CUPolicyPro

Overview of Changes:
New vs. Old System

Overview of CU PolicyPro Changes: New vs. Old System

Welcome to the new CU PolicyPro!

To help make the transition to the new platform as easy as possible, we have created this document which compares the location and function of popular features found in the new and old CU PolicyPro systems.

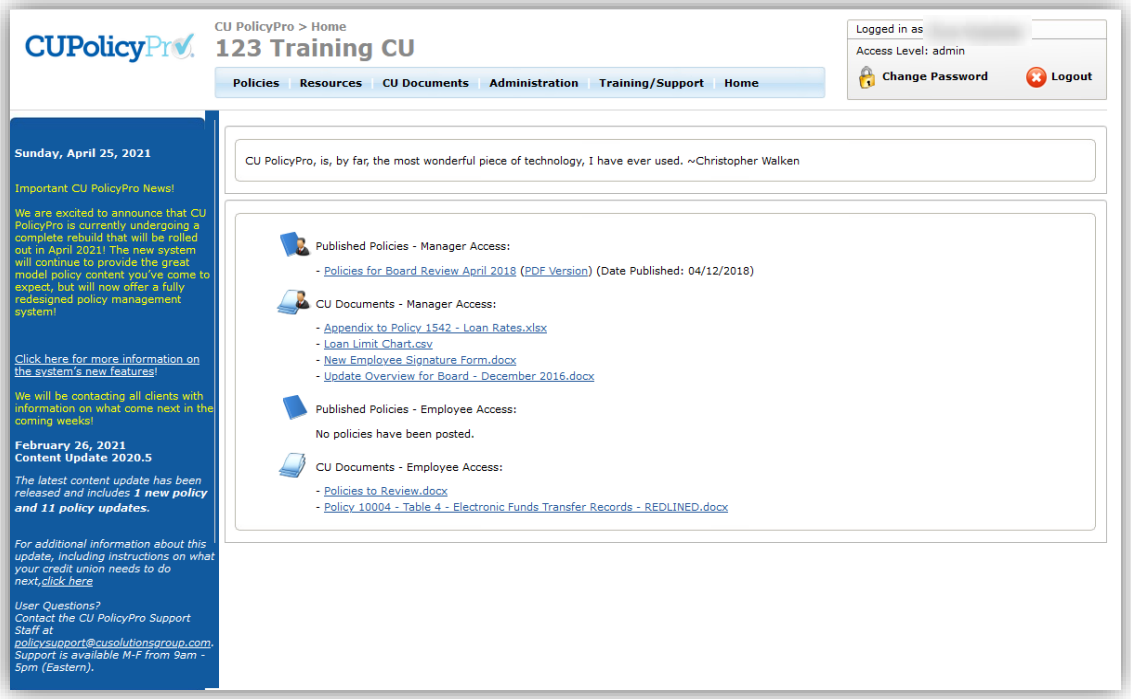
Notes:

- The old system images and descriptions are always on the left side of the screen; new on the right.
- All screenshots are showing Admin-level user access. If you have a different level of access, you may not see all of the features and tools shown.
- This document is not meant as an instruction manual for how to use the features and functions highlighted. For detailed instructions, please refer to the Quick Guides in the Support area of CU PolicyPro.
- Look for this symbol

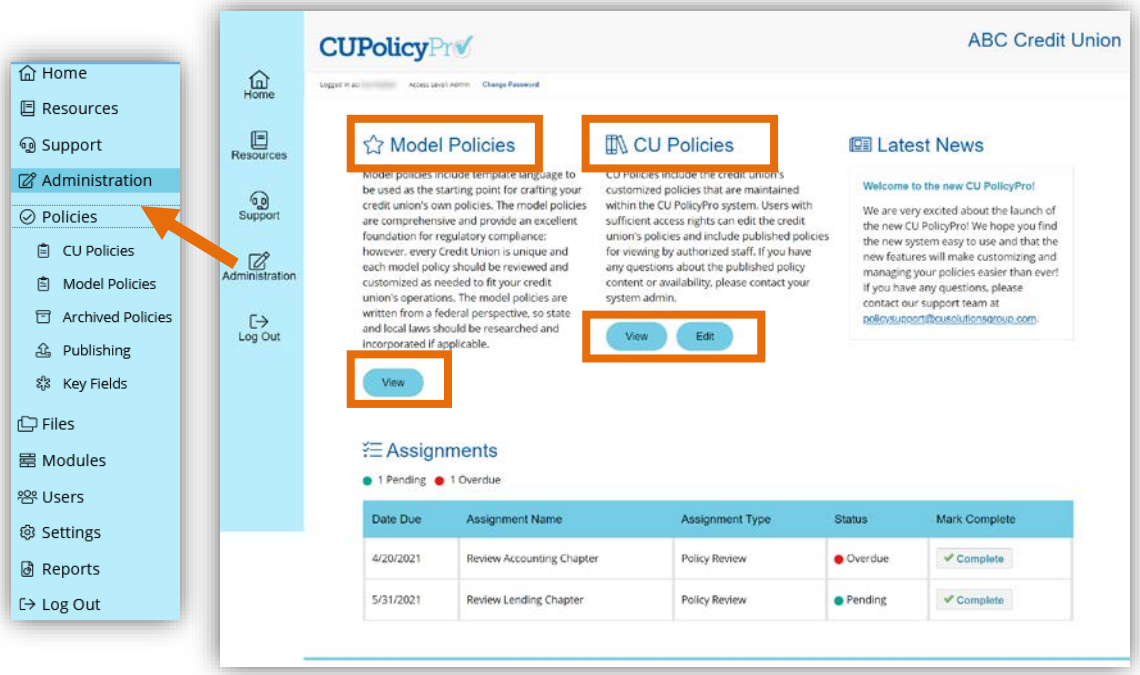
next to descriptions of features that are new or enhanced in the new CU PolicyPro system.

Home Page and Navigation

- Site navigation on the top of the screen
- News and announcements displayed on the left side of the screen



- Site navigation on the left side of the screen
- News and announcements displayed more prominently on the right side of the screen
- Text defining model policies and CU policies to highlight the differences between the 2 manuals
- Quick access to view model polices and published manuals and to edit CU policies
- List of current assignments for the user
- Additional navigation options are available in the Administration area

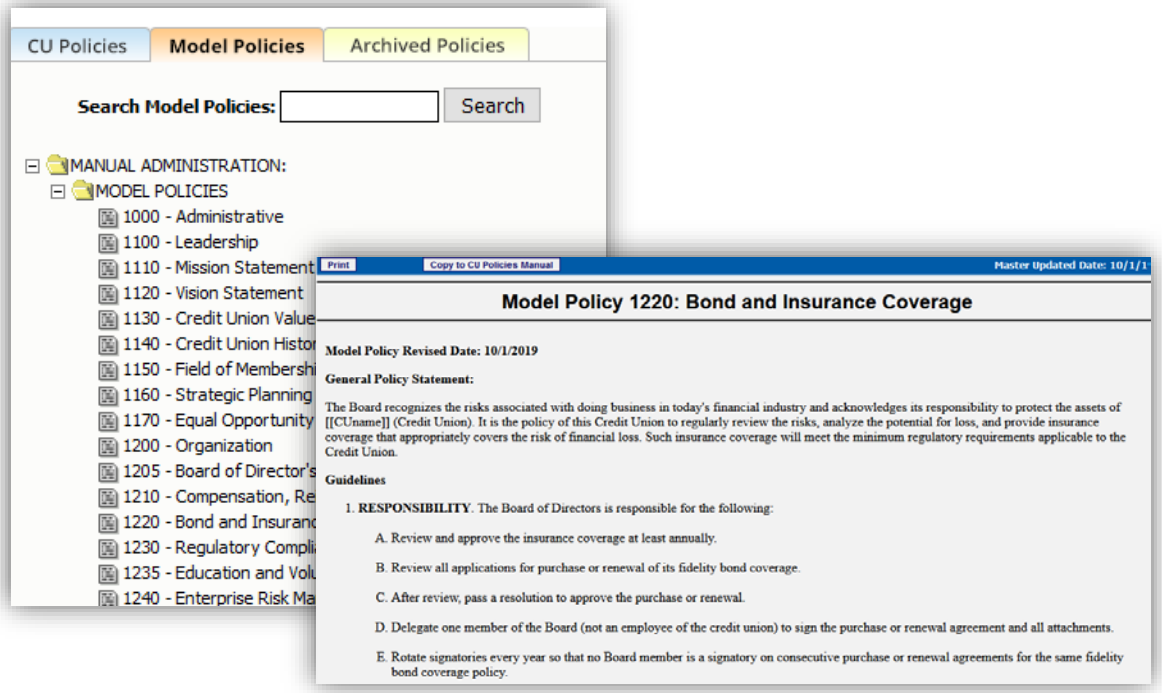


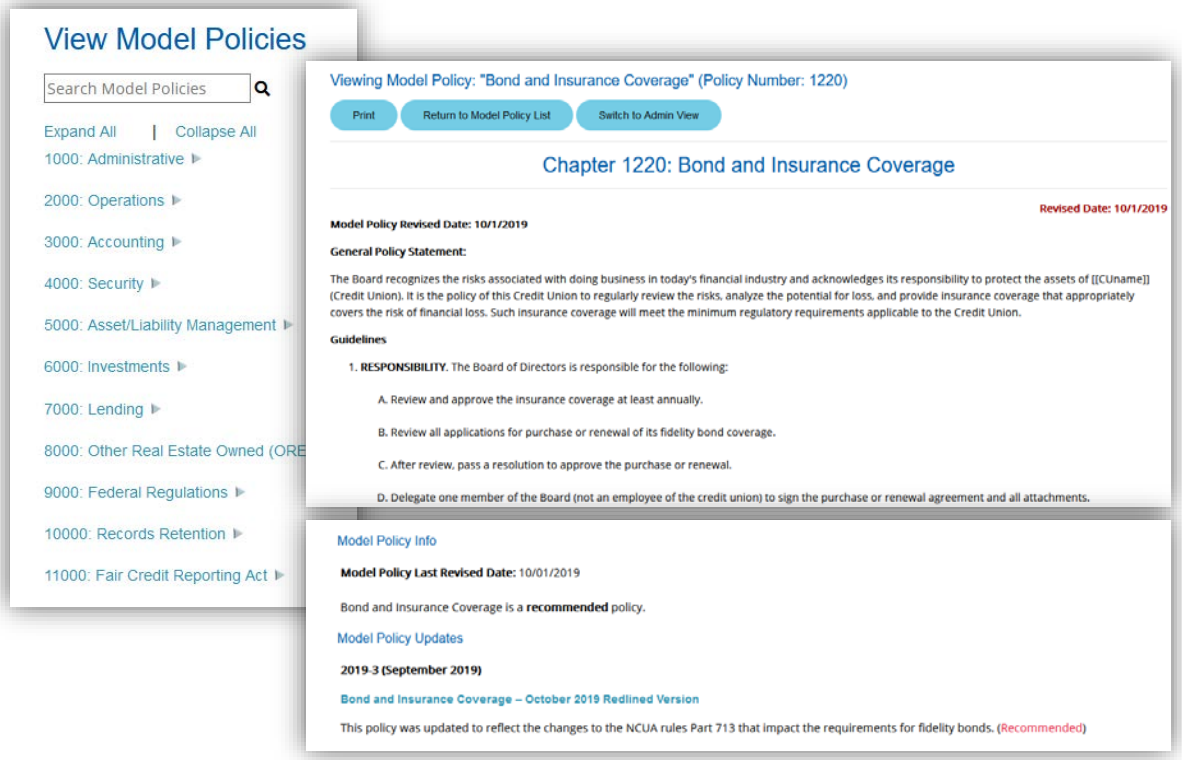
Accessing Model Policies

- Users must have access to the entire “Policies” area to view model polices
- One long listing of model policies
- Users can search only the policy text

- Model policies are available to all users from the Home page
- Model policy listing is collapsible by chapter
- Users can search both policy number and policy text
- Quick access to switch to “Admin View” to add model polices to the CU Policies manual
- Additional information about each model policy, including whether it is recommended/required/etc., helpful links/forms, and redlined versions of the policy from each update.

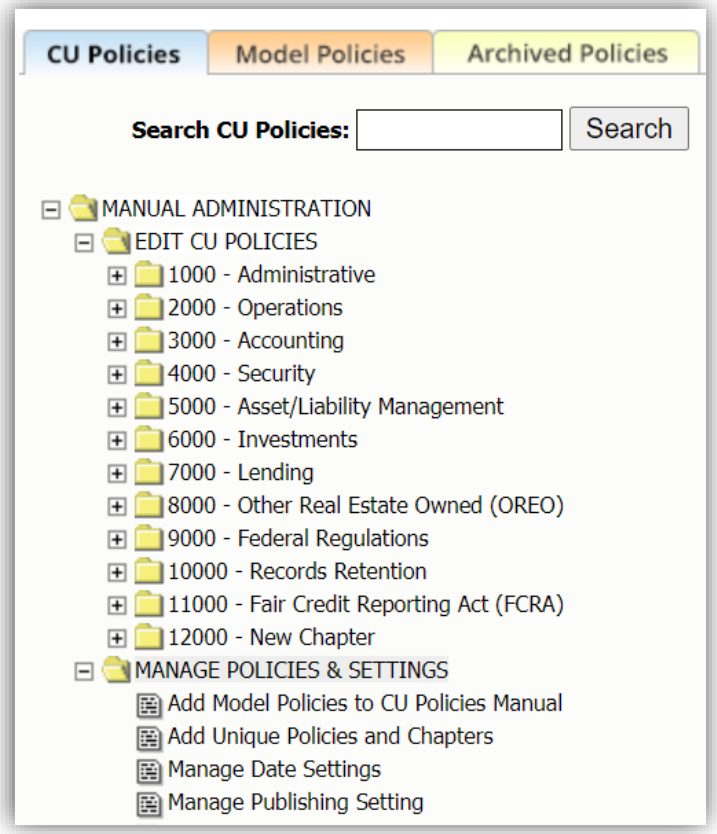
NEW!



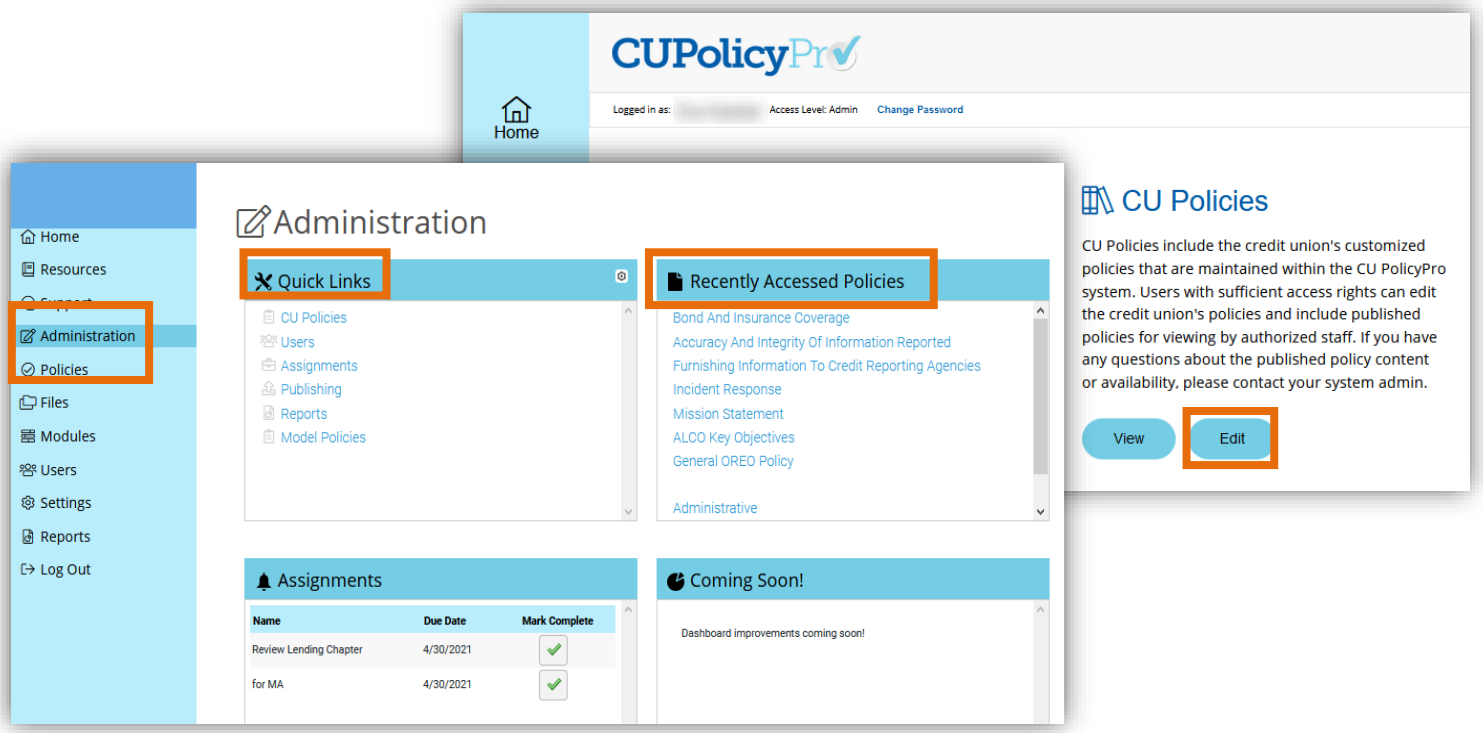


Accessing CU Policies

- CU polices are accessed in the Policies area



- CU Policies can be accessed through the Administration link on the left navigation menu or from the Edit button on the Home page
- Dashboard allows users to create quick links to the various areas under Administration and easily pick up where they left off previously with the last ten policies accessed

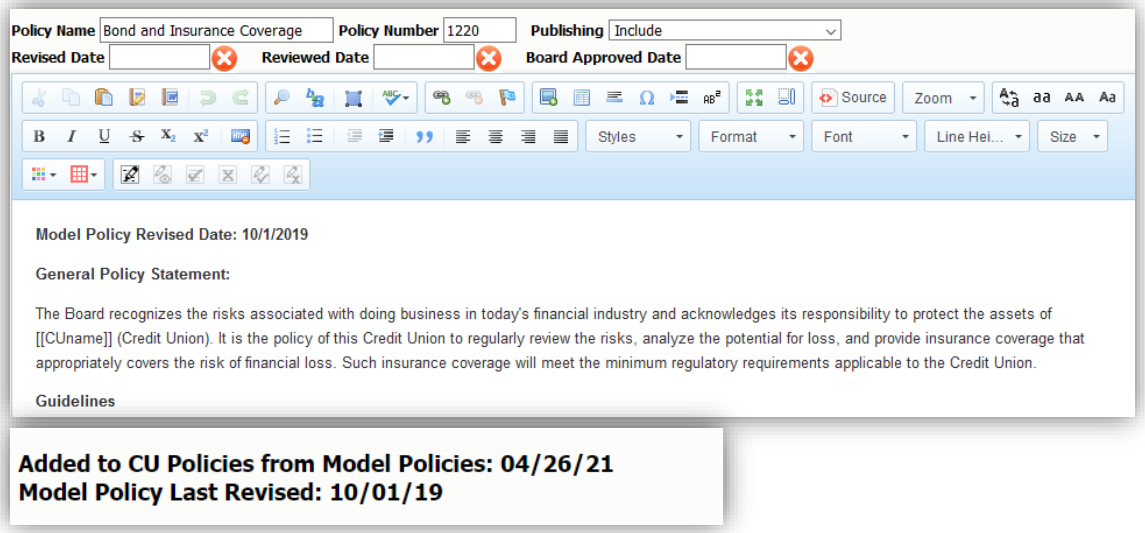


Editing CU Policies

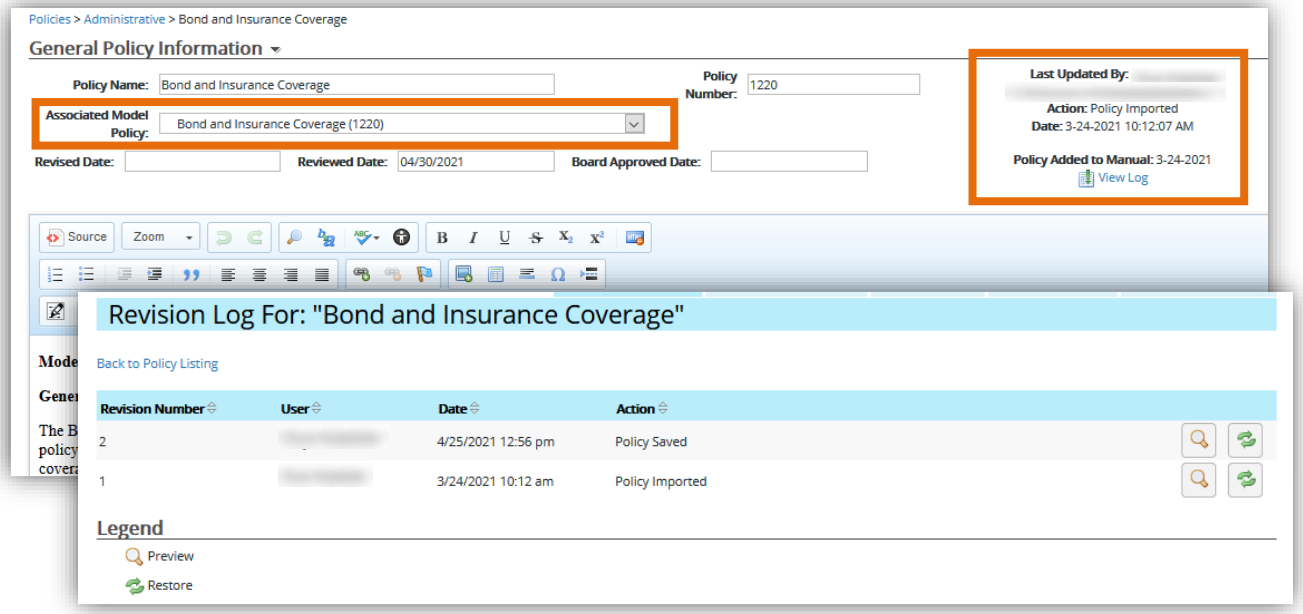
- Date policy was added to manual is found below policy content
- Policy number alone associated the model policies to the CU Policies. Changing a policy number disrupted this association.
- Users can be assigned rights to view all polices or to edit all policies

- Date policy was added to manual is above policy content
- Associated model policy allows users to change the name and/or number of the CU policy while maintaining association with the original model policy, or to add model policy association to a unique policy
- Viewing and/or editing rights for CU policies can be assigned down the policy level
- Shows who made the last update to the policy and when
- Activity Log allows users to view the history of activity on each policy and view/restore previous policy versions

NEW!

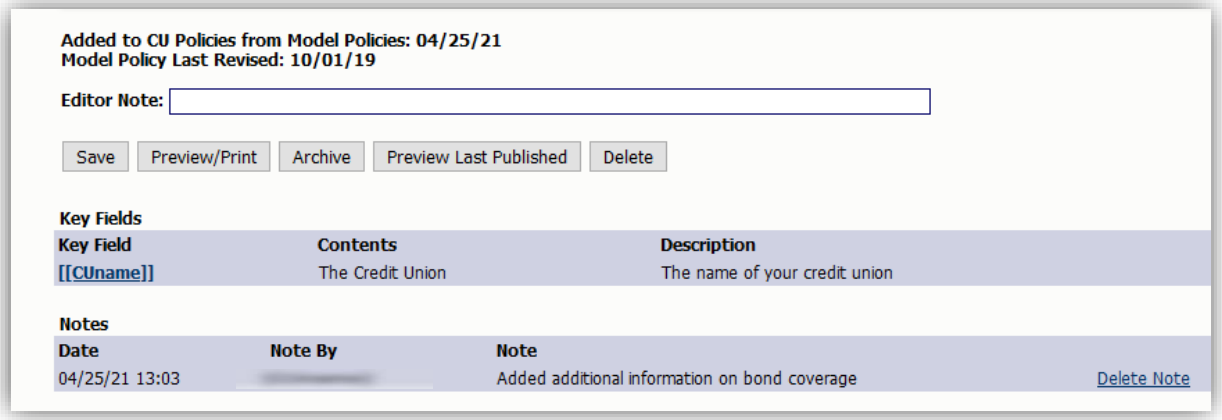


Added to CU Policies from Model Policies: 04/26/21
Model Policy Last Revised: 10/01/19

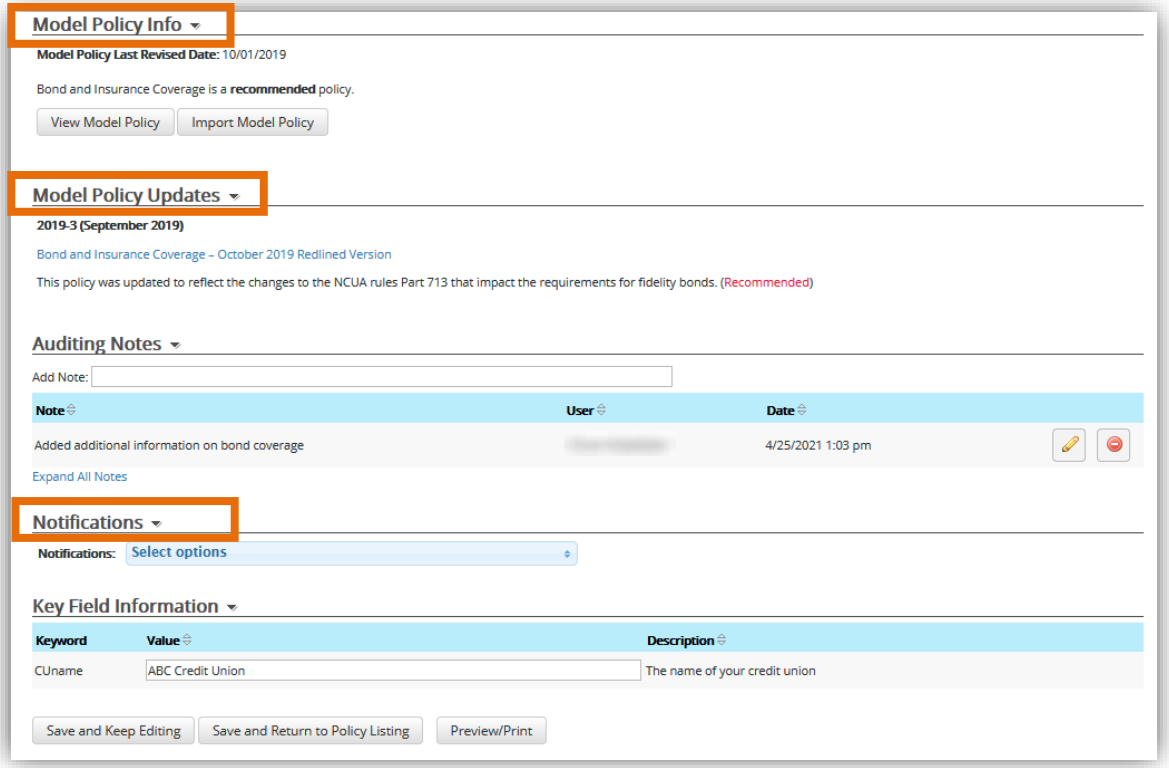


Additional Information in CU Policies

- Editor Notes can be deleted
- Key Fields can be viewed, defined, and edited in a pop-up box

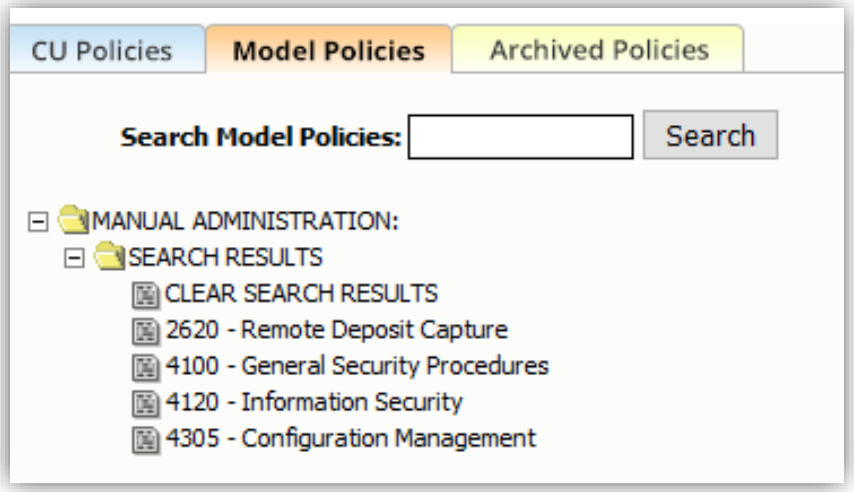


- Auditor Notes can be deleted and edited
- Key Fields can be viewed, defined, and edited directly on the screen
- Includes information about associated model policy, including whether it is recommended/required/etc., helpful links/forms, and redlined versions of the policy from each update
- Users can subscribe to receive email notifications each time the CU policy is saved

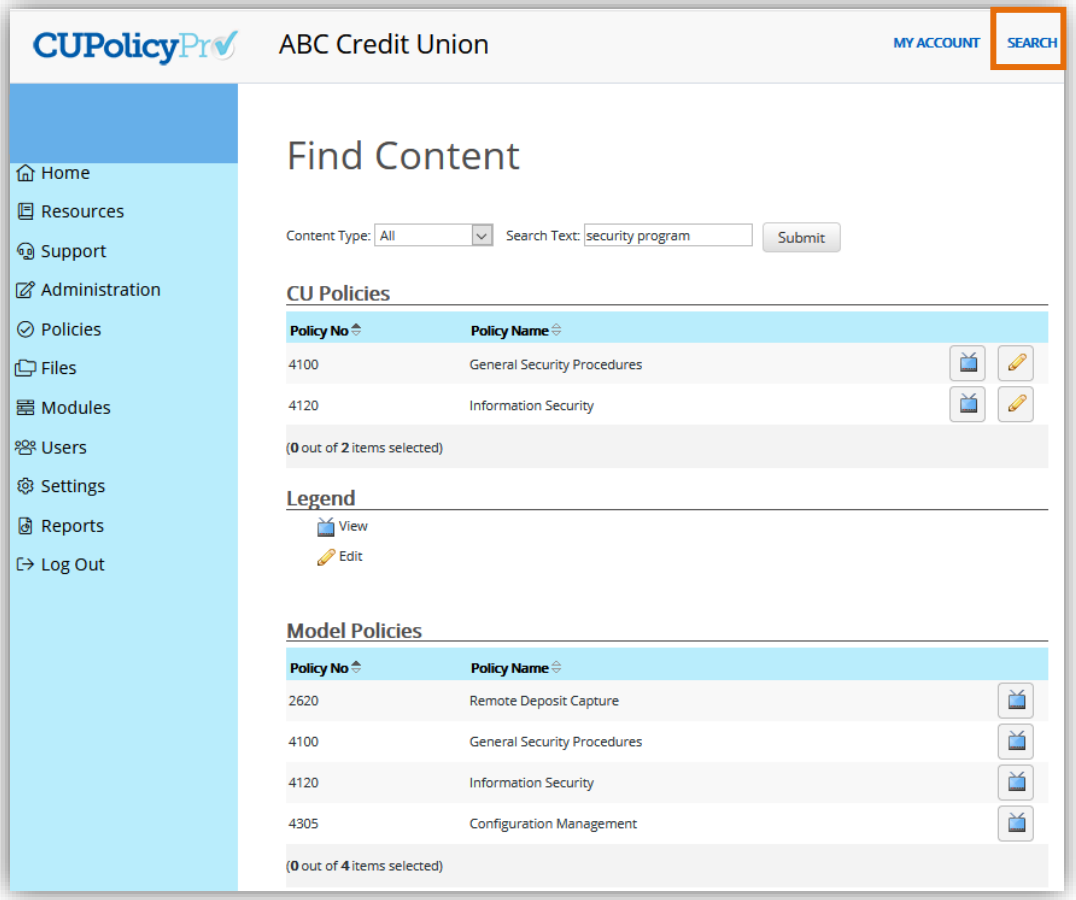


Searching Policies

- Each manual must be searched separately
- Users can search the policy text

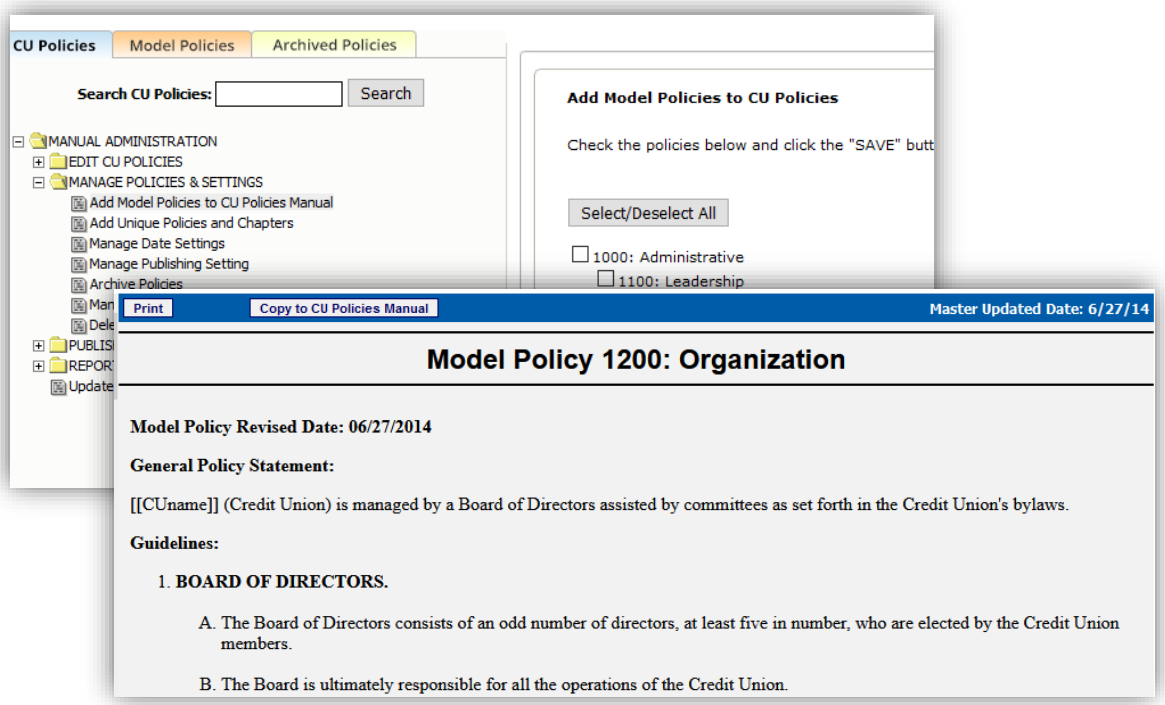


- The Search option in the Administration area allows users to search both model policies and CU policies at once
- The Search option on the Home page allows users to search model policies only (restricting access to view CU policies)
- Users can search the policy number and the text

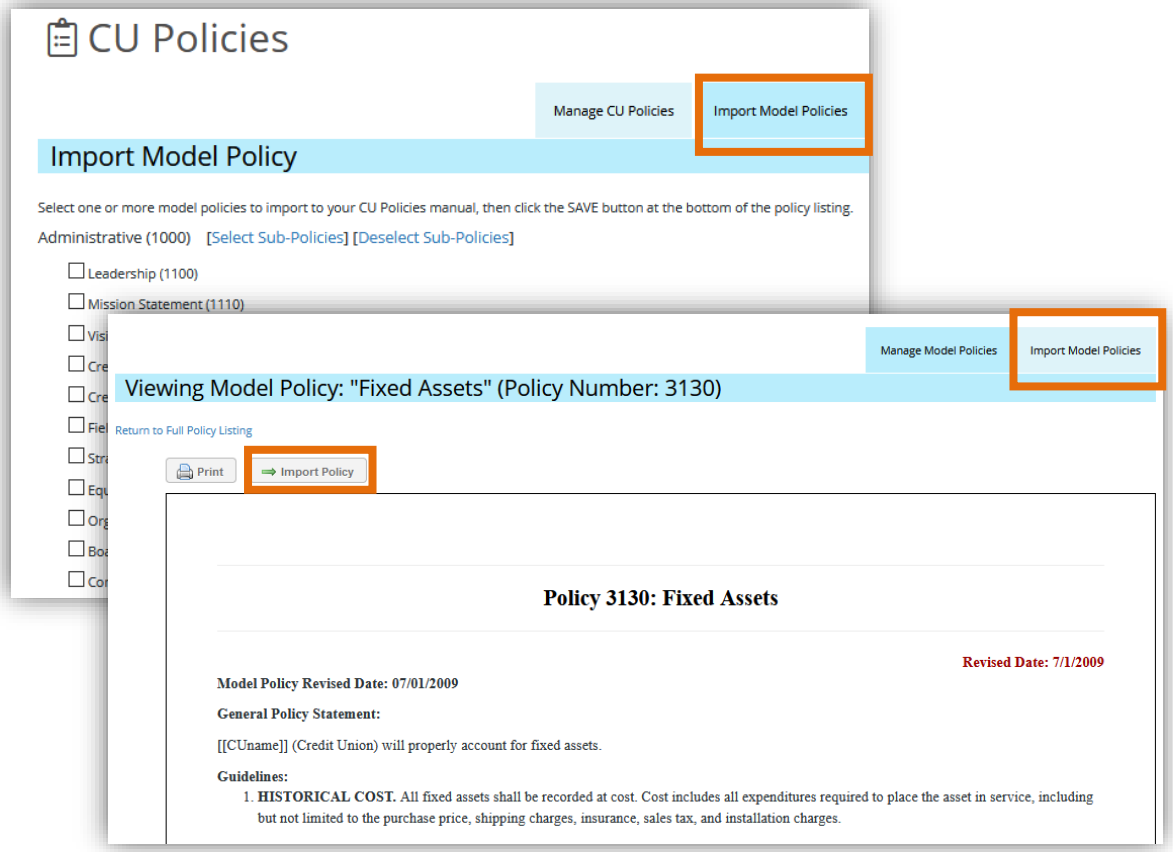


Adding Model Policies to the CU Policies Manual

- Users can add a single policy when viewing individual model polices
- Users can add multiple policies at once in the CU Policies settings



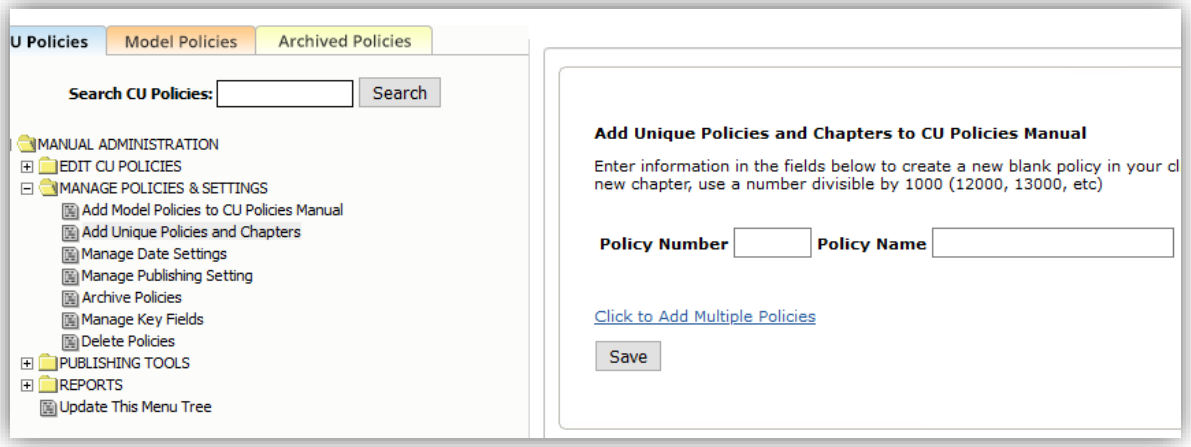
- Users can add a single policy when viewing individual model policies
- Users can add multiple policies at once under the “Import Model Policies” tab

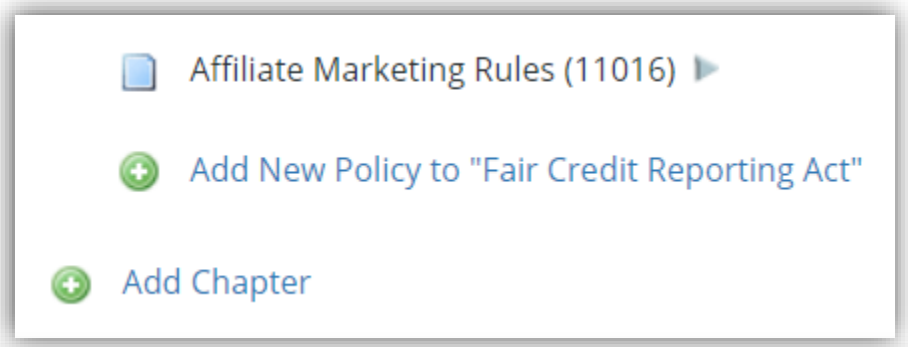


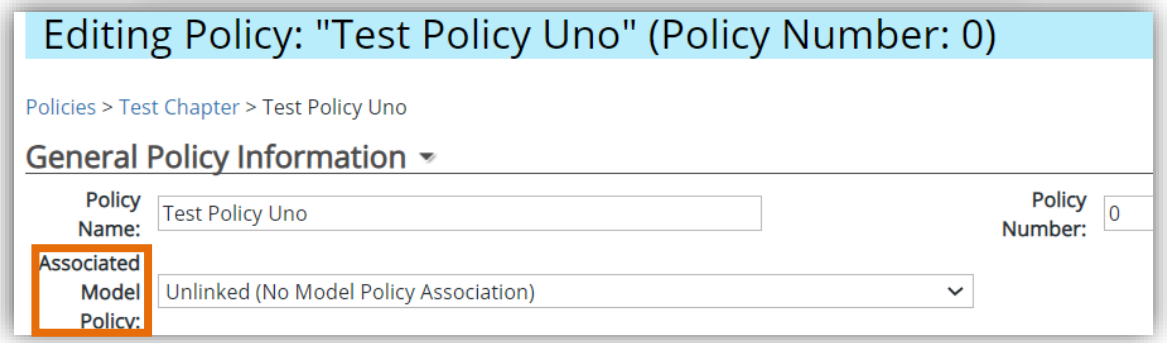
Adding Unique Policies to the CU Policies Manual

- New policies and chapters are added in the “Add Unique Policies and Chapters” utility.
- Policy number required upon creation of policy
- Policy placement is determined by the policy number

- New policies and chapters are added using the link at the end of the respective listing
- Policy or chapter number can be added when editing
- Number does not have to determine the order or placement of a policy or chapter
- Unique policies can be associated with a corresponding model policy to link additional model policy information to the unique policy



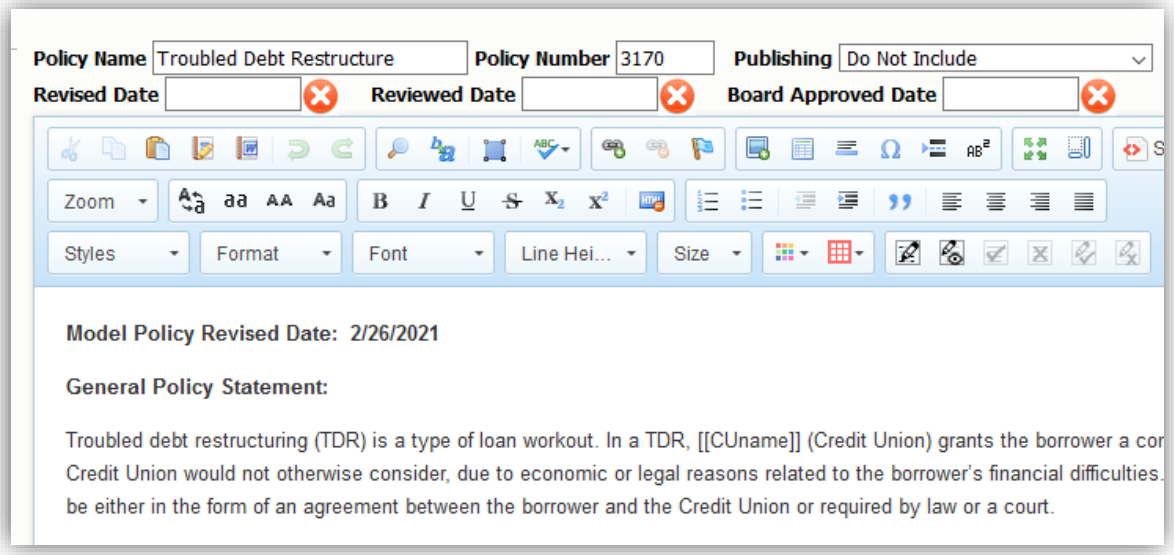


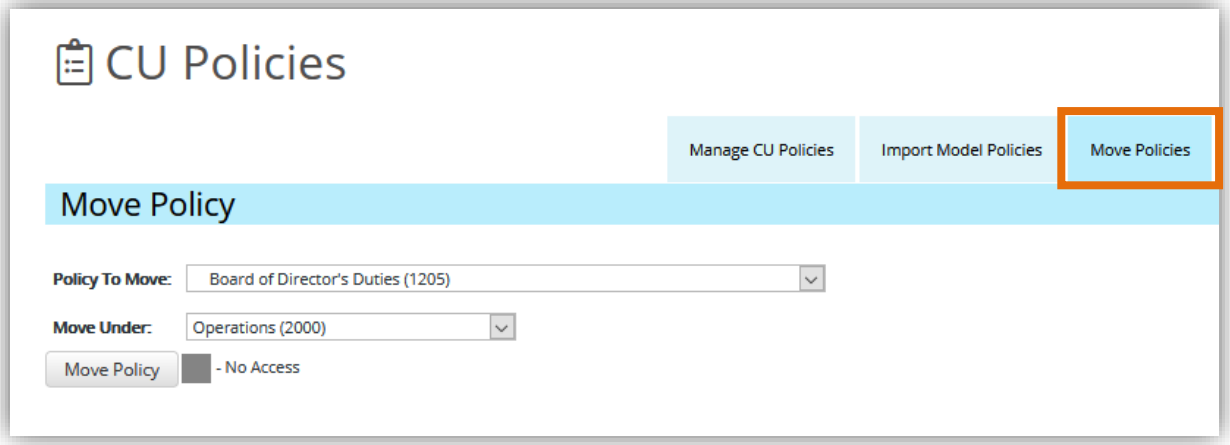


Moving CU Policies

- CU policies can only be moved between chapters by changing the policy number, which can break the association with the original model policy

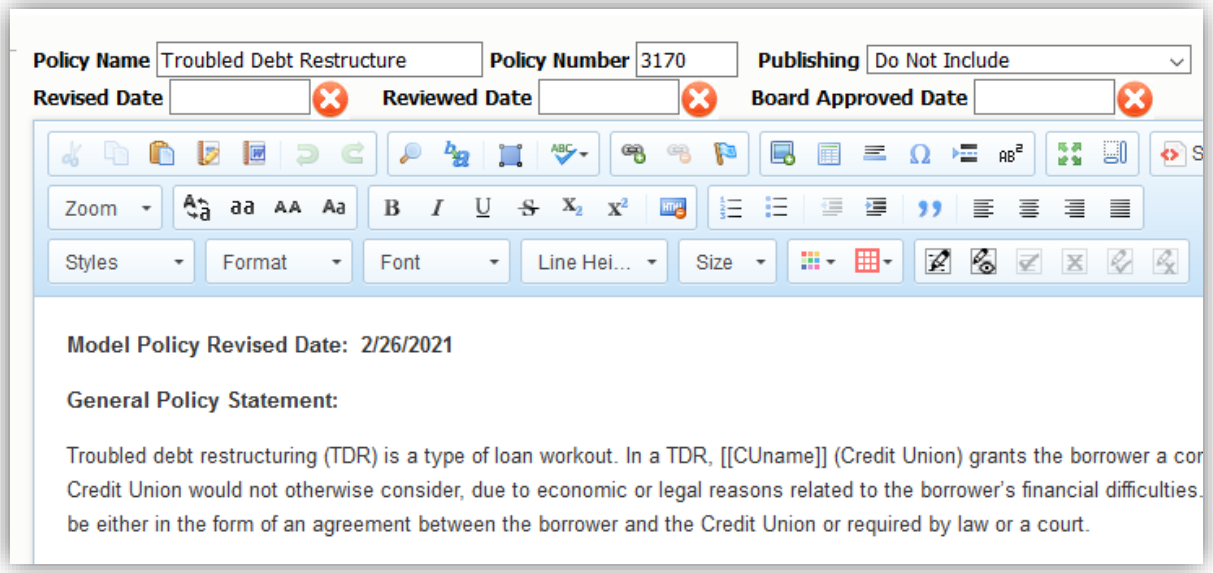
- CU policies can be moved between chapters in the “Move Policies” tab
- Moving a policy does not require a change to the policy number (although the number can be changed when editing, if desired, and the system will maintain the association with the original model policy)



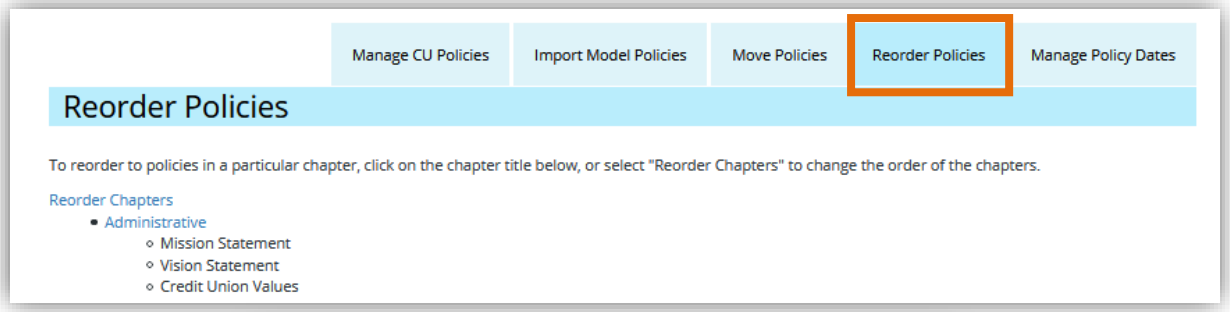


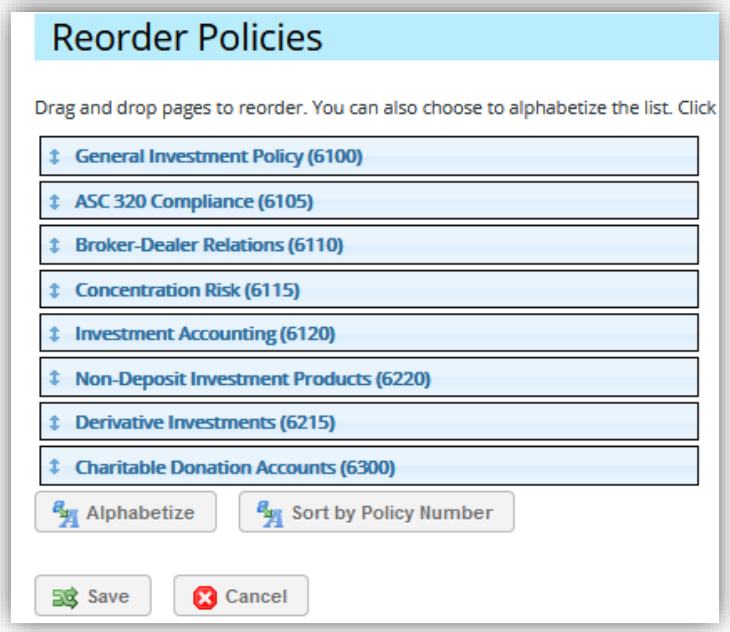
Reordering CU Policies

- CU policies can only be reordered by changing the policy number, which can break the association with the original model policy



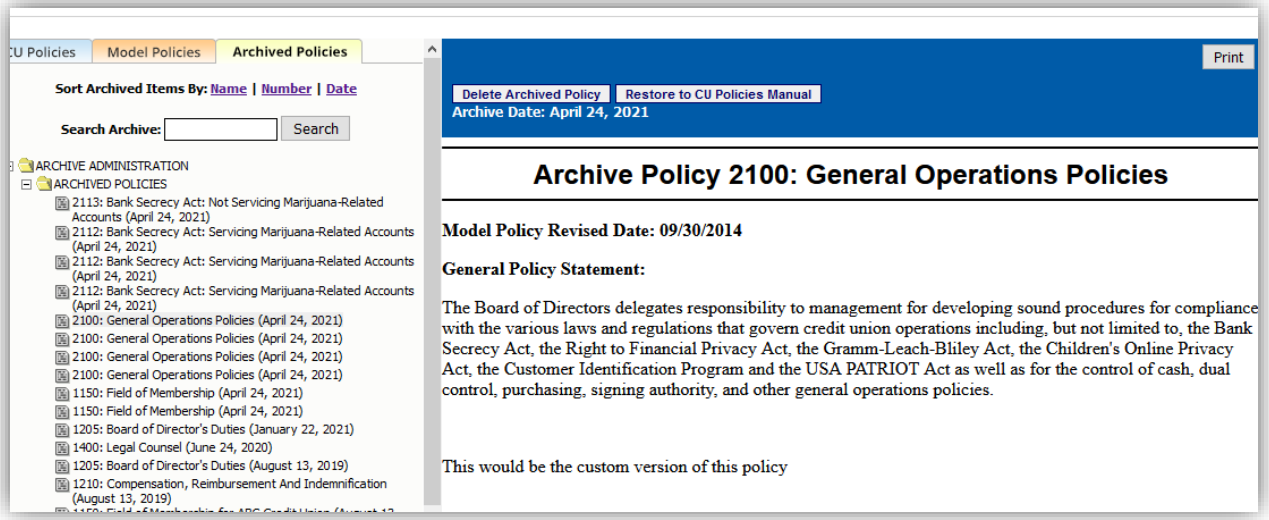
- CU policies and chapters can be reordered in the "Reorder Policies" tab
- Policies and chapters can be ordered numerically, alphabetically, or in a specific order chosen by the user



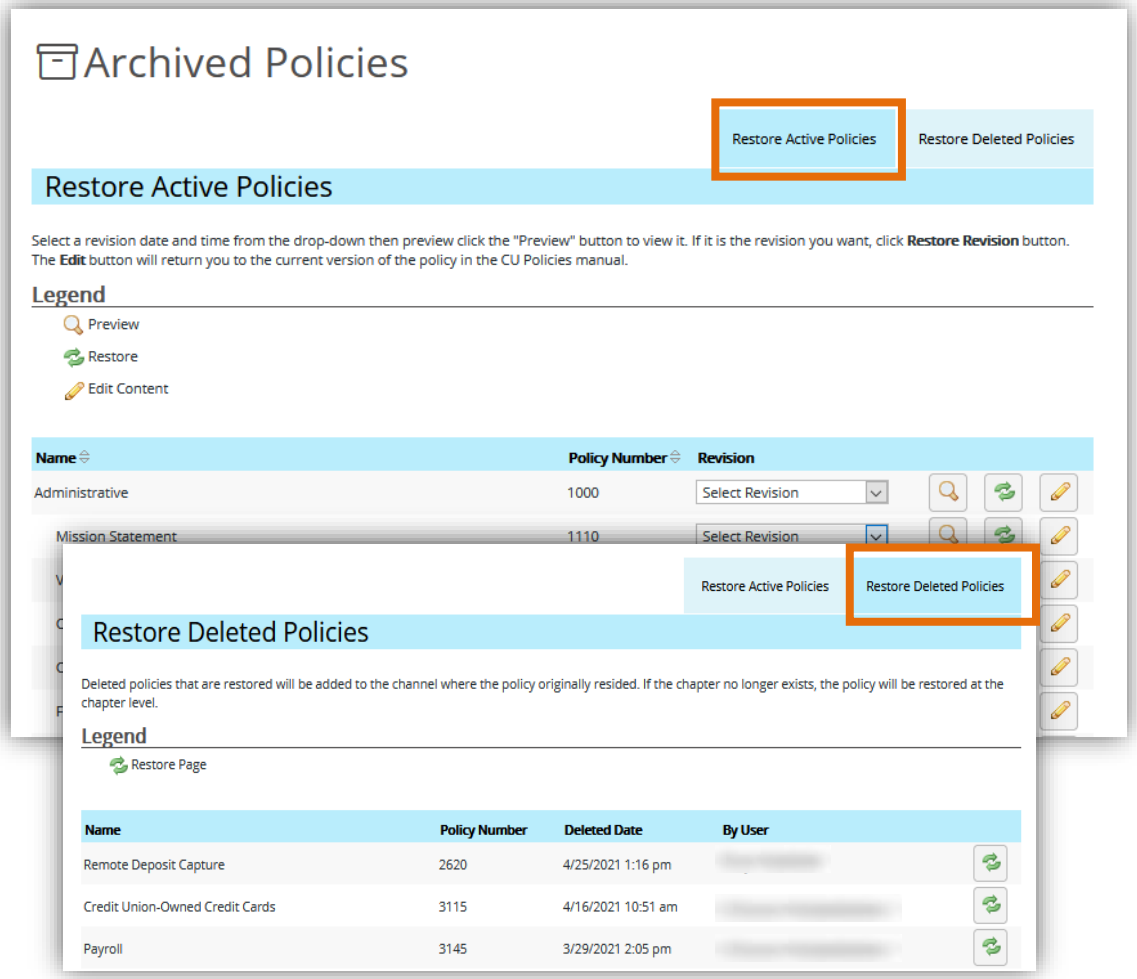


Archived Policies and Restoring Active and Deleted Policies

- Users must choose to archive a policy in order to store it in the Archive
- Archived policies can be viewed and restored
- Users must contact support to restore a deleted policy or get information on who deleted a policy

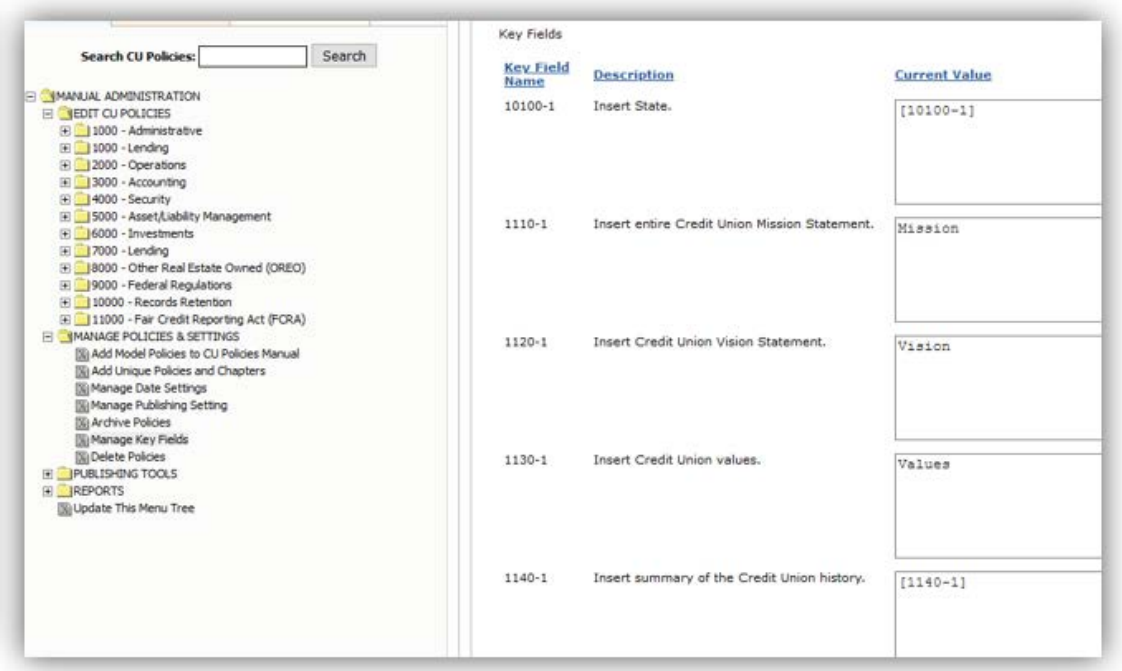


- Policy revisions are captured automatically in the Archive
- Archived policies can be viewed and restored
- Users can restore deleted policies and view who deleted the policy and when

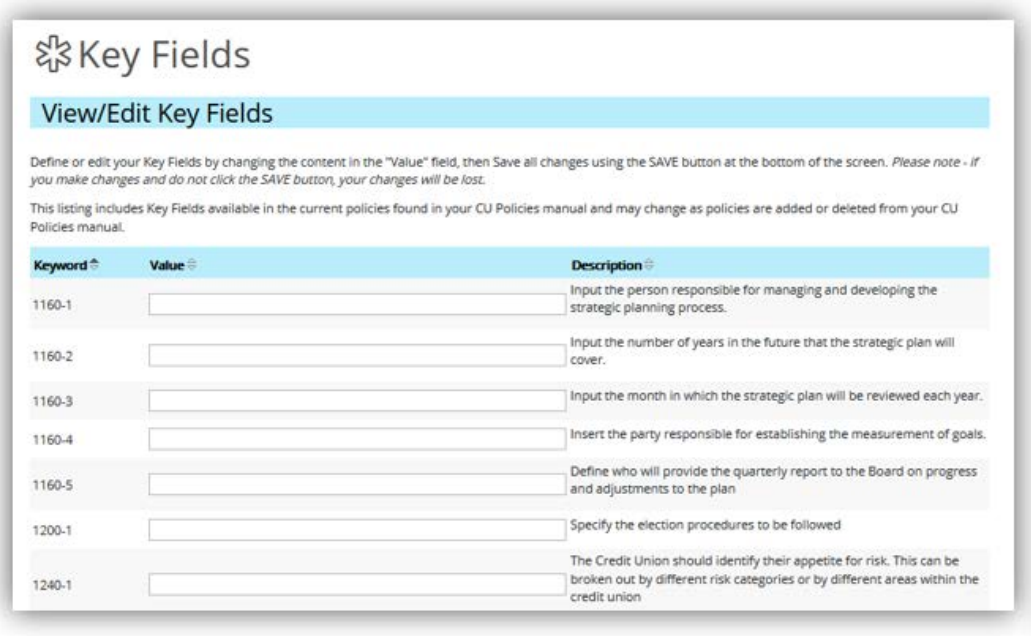


Key Fields

- Key fields can be managed at the policy level, and at the policy level only the key fields present in the policy will show
- Users can access the Key Fields database to view/edit all key fields in one place
- The Key Fields database displays all key fields available for any model policy

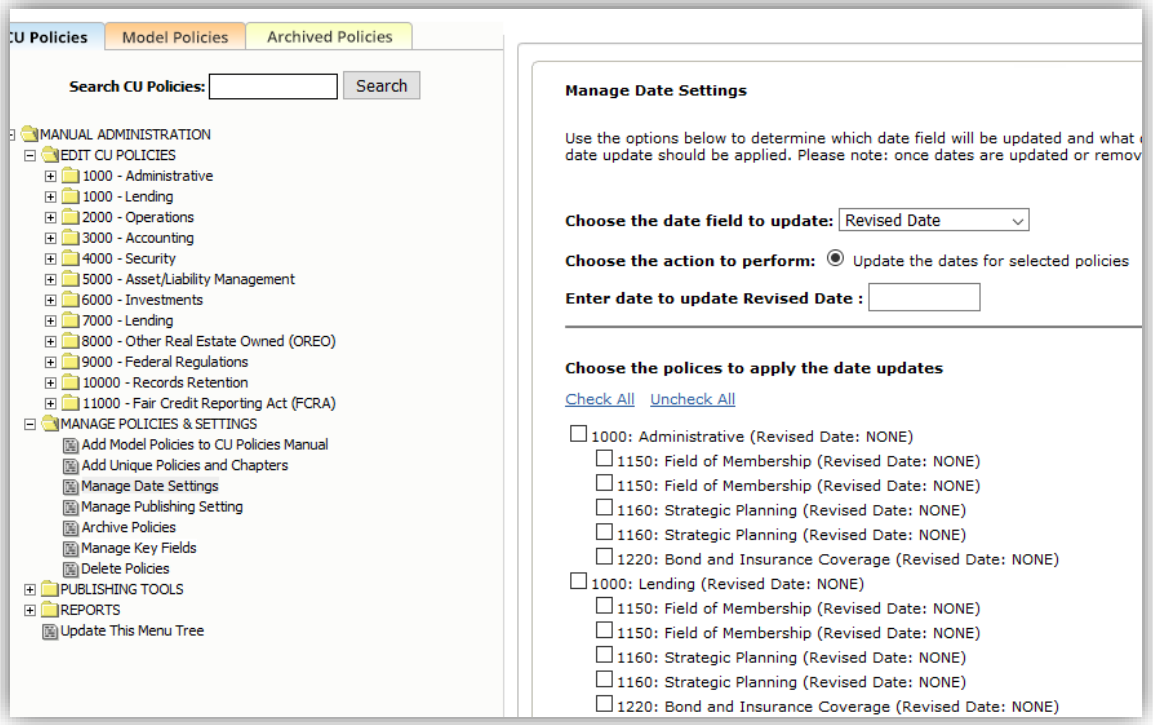


- Key fields can be managed at the policy level, and at the policy level only the key fields present in the policy will show
- Users can access the Key Fields area to view/edit all key fields in one place
- The Key Fields area only displays those key fields in use in the current CU Policies manual

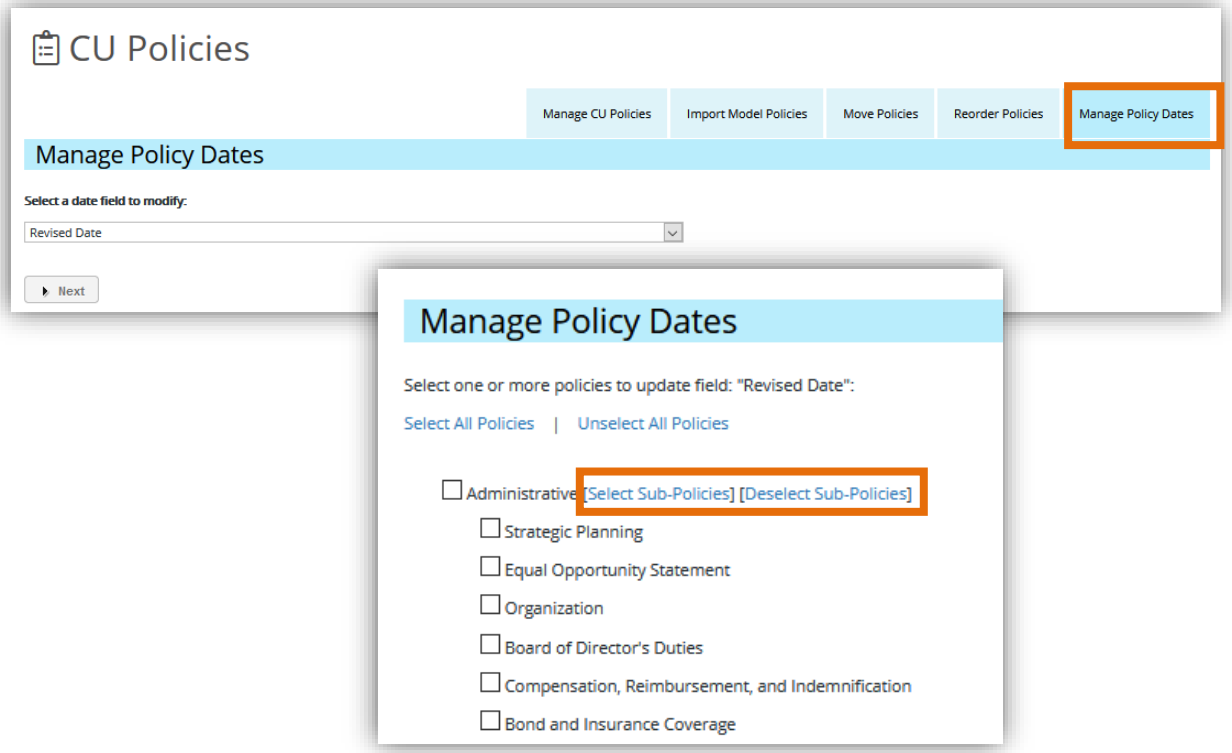


Managing Dates

- Dates can be managed for multiple policies at once in the “Manage Date Settings” utility
- All policies can be selected at once

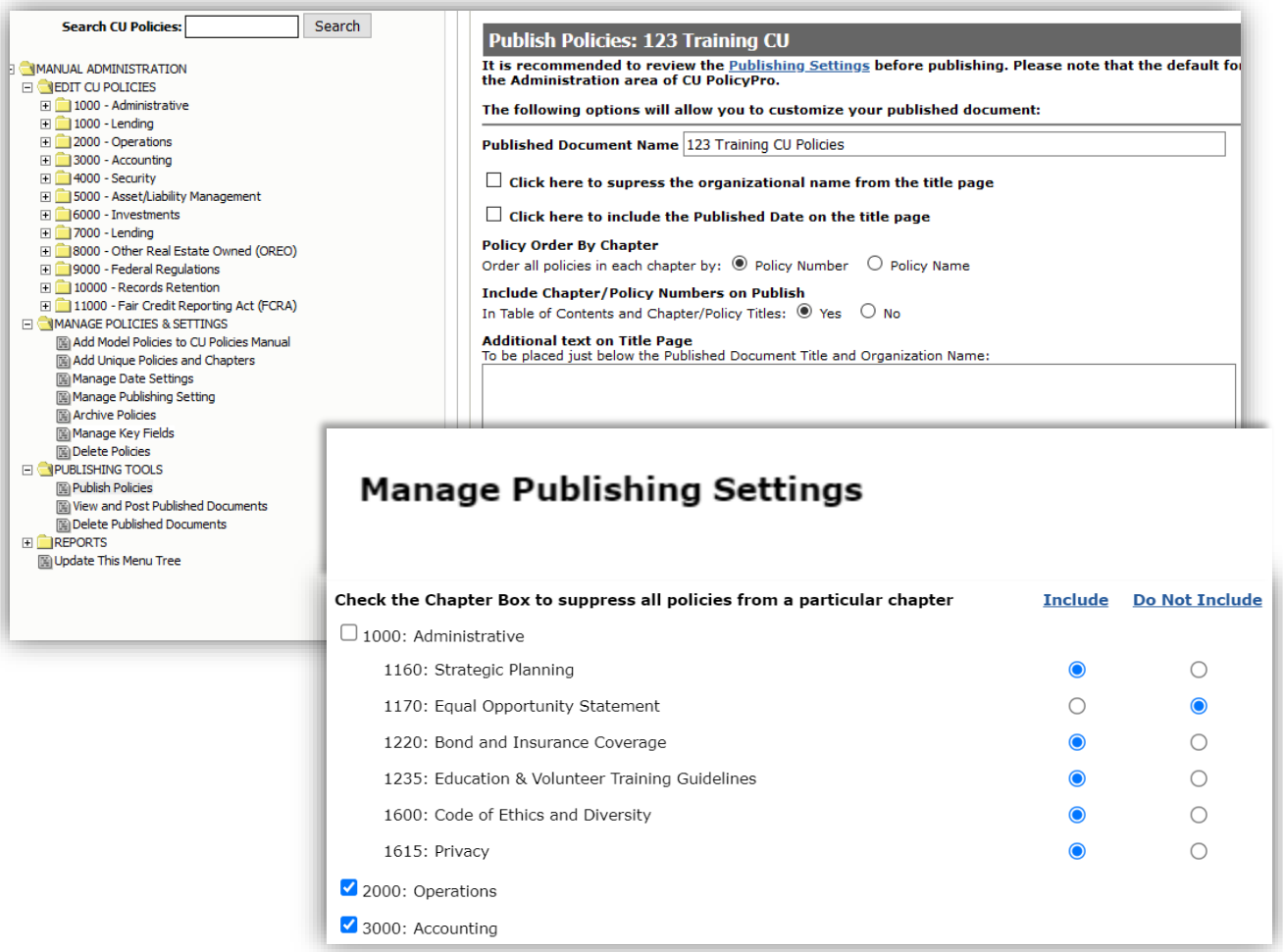


- Dates can be managed for multiple policies at once under the “Manage Policy Settings” tab
- All policies can be selected at once and all policies in a single chapter can be selected at once

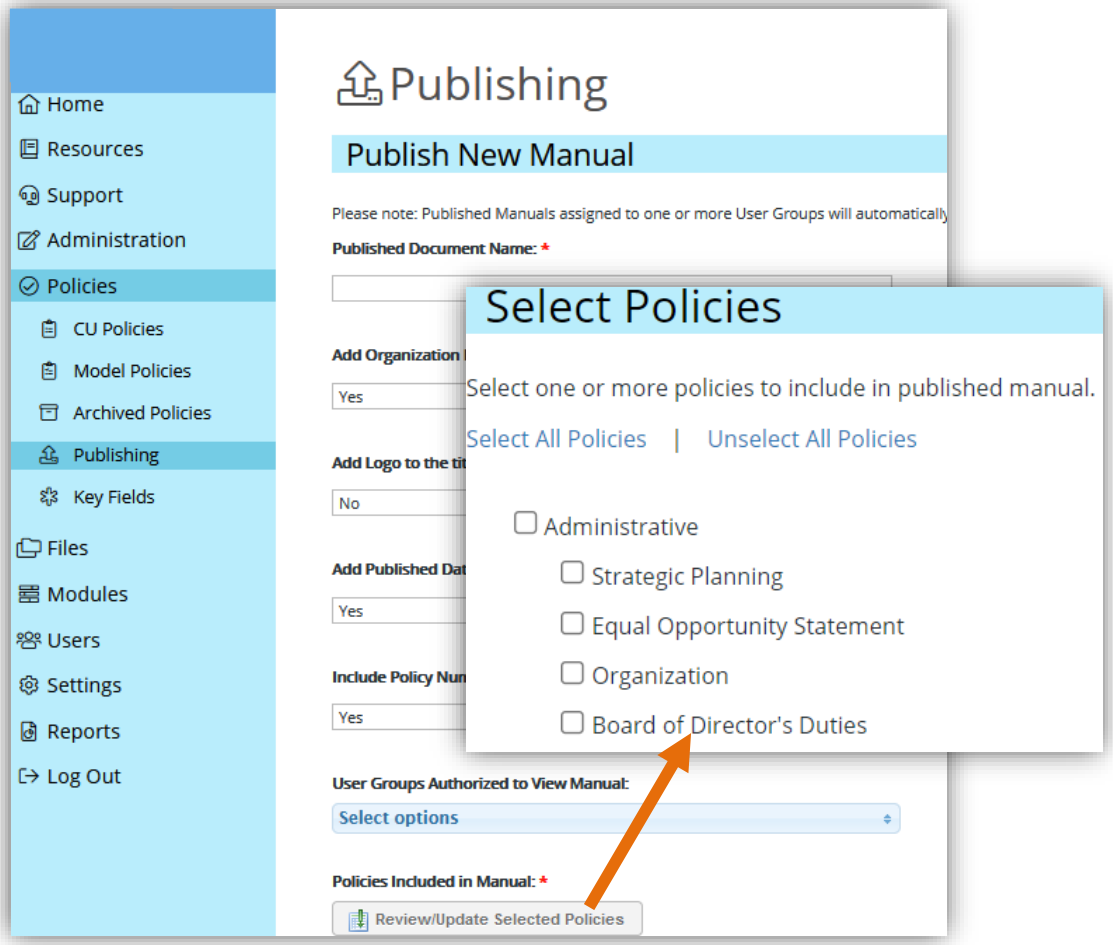


Publishing

- Publishing a manual creates a printable point-in-time document of selected policies
- Users must go to a separate “Publishing Settings” area to choose policies to be included



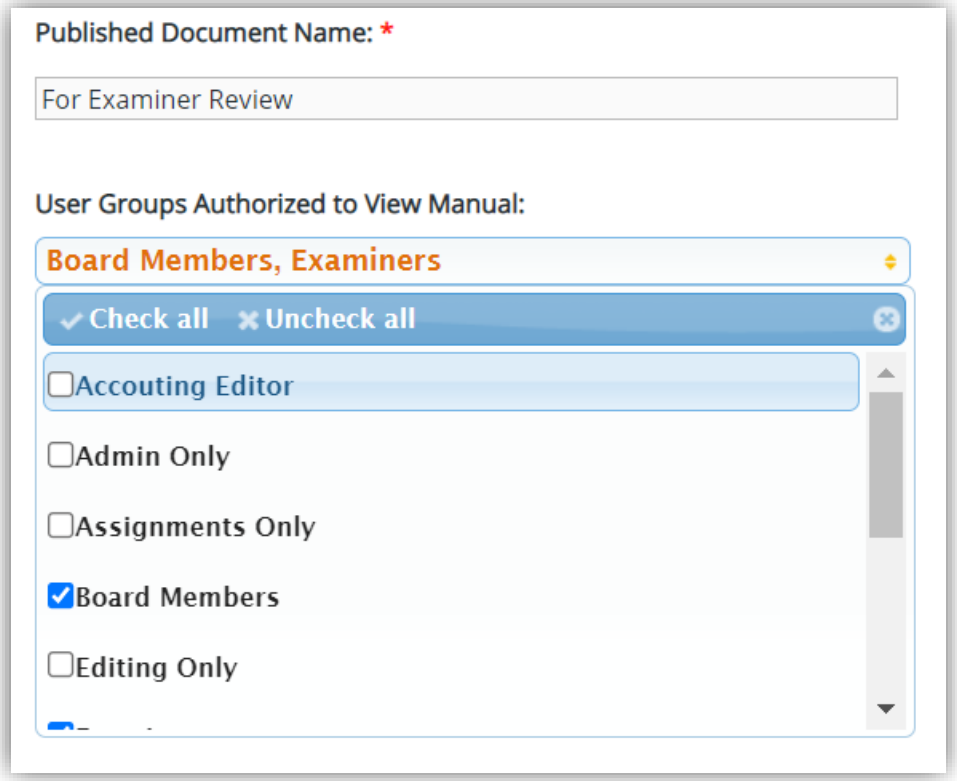
- Publishing a manual creates a printable point-in-time document of selected policies
- Policies to be included in a published manual are chosen at the time of publishing



Posting Published Manuals

- Access to view published manuals is determined by the user's access level – there are two pre-defined access levels
- Published manuals can be viewed from the Home page and users can see all published manuals under "Employee Access," as well as those under "Manager Access," if they have access

- Access to view published manuals is determined by the user's access level and/or associated security groups defined by the credit union – there are four pre-defined access levels and unlimited groups can be created.
- Published manuals can be viewed from the Home page and users can only see the published manuals listed that they have access to (if any)

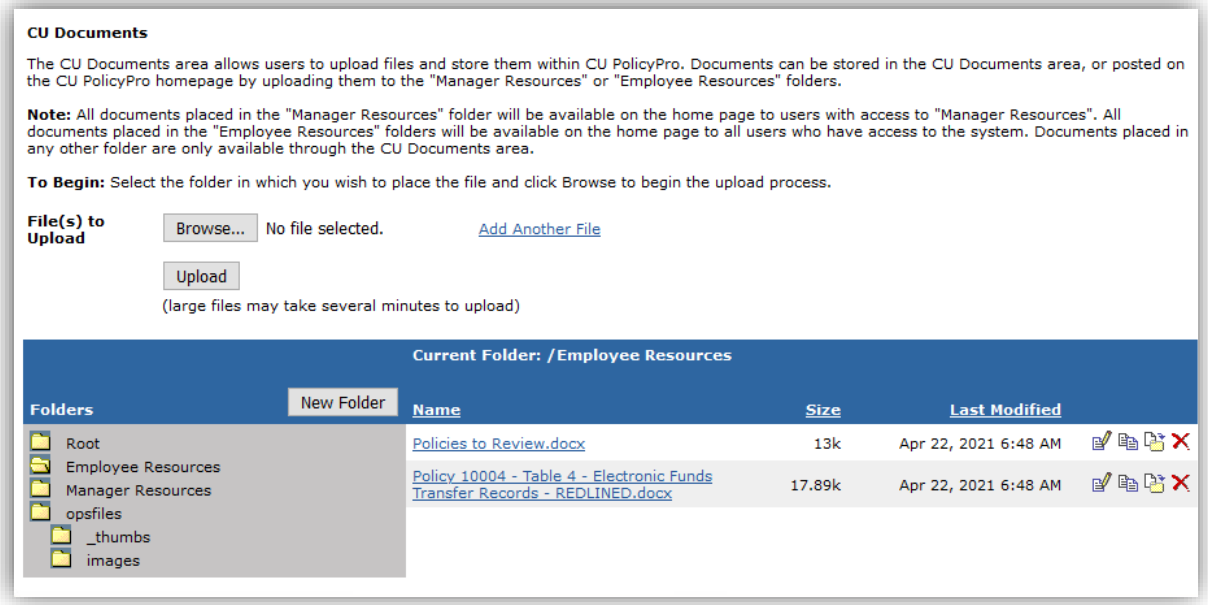


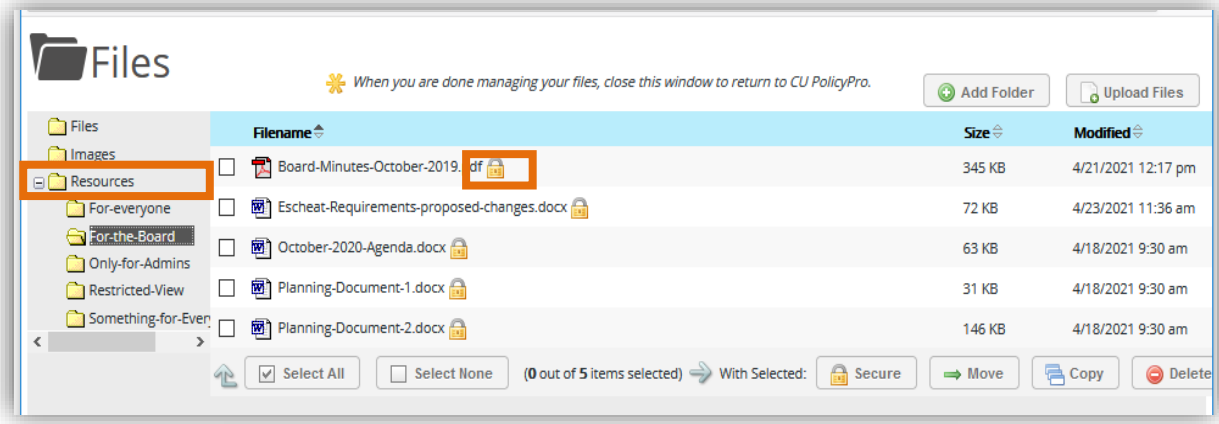
Uploading Documents

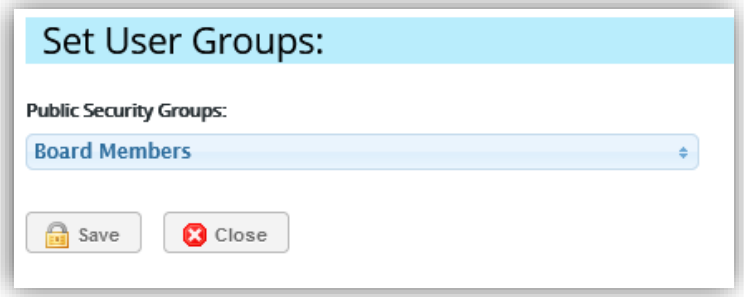
- Documents are uploaded in the “CU Documents” area and housed in the “Root” folder, which is only available from CU Documents, or in the “Employee” or “Manager Resources” folders, which are visible from the Home page

NEW!

- Documents are uploaded in the “Files” area and housed in the “Files” folder, which is only available from the Administration area, or in the “Resources” folder, which is visible from the Resources page
- Access to folders or files posted by the credit union in Resources can be restricted to specific users by Security Groups, either at the folder level or the document level

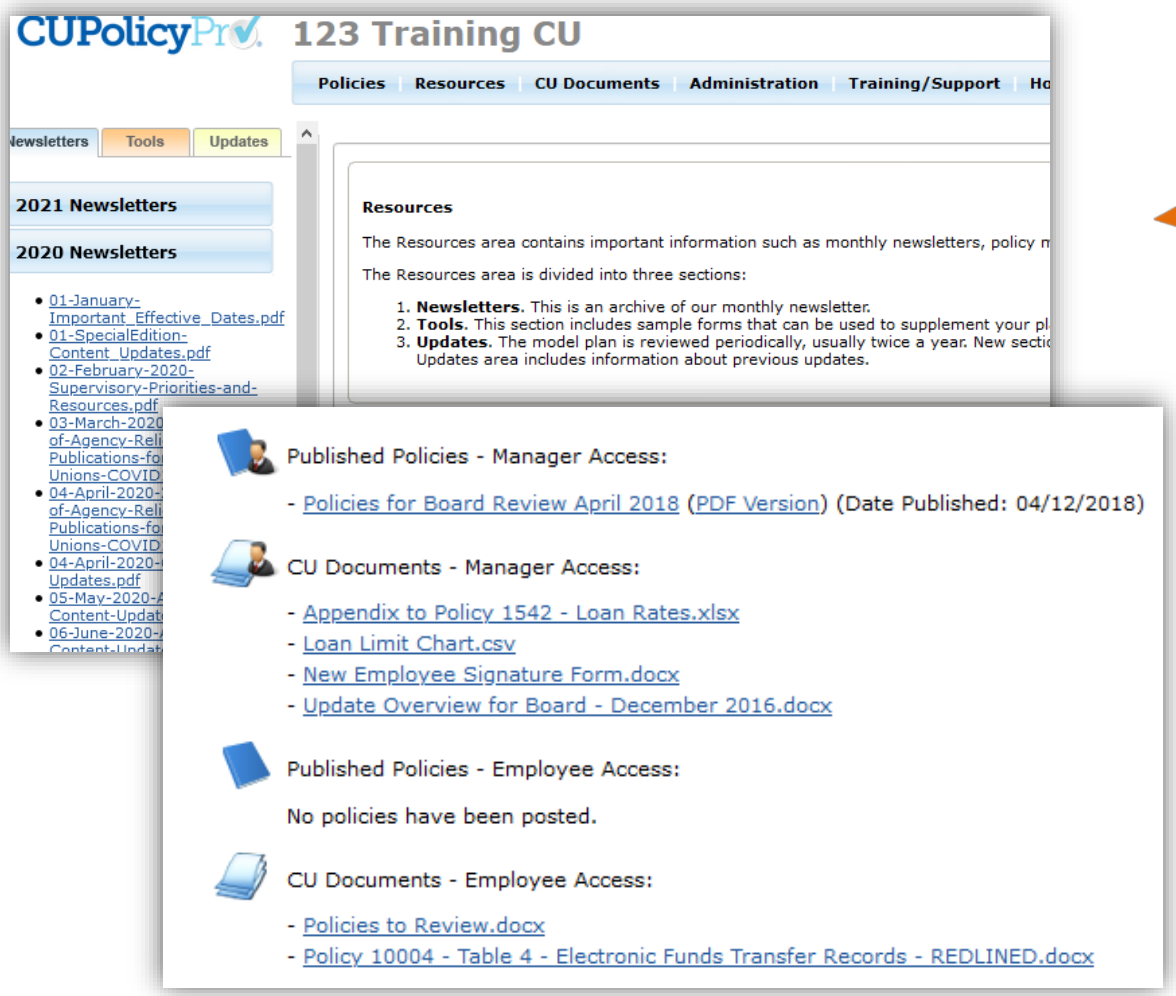






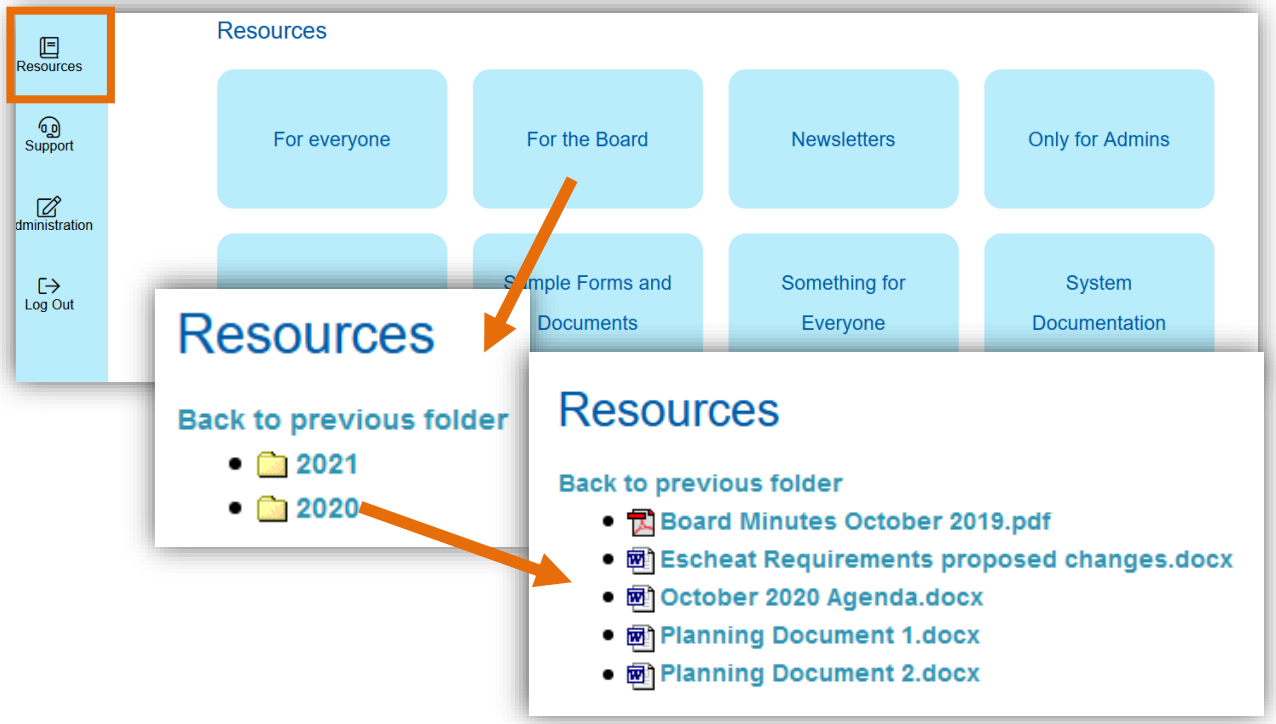
Viewing Resources

- Posted documents are found on the Home page and system documents posted by CU PolicyPro staff are available in the Resources area



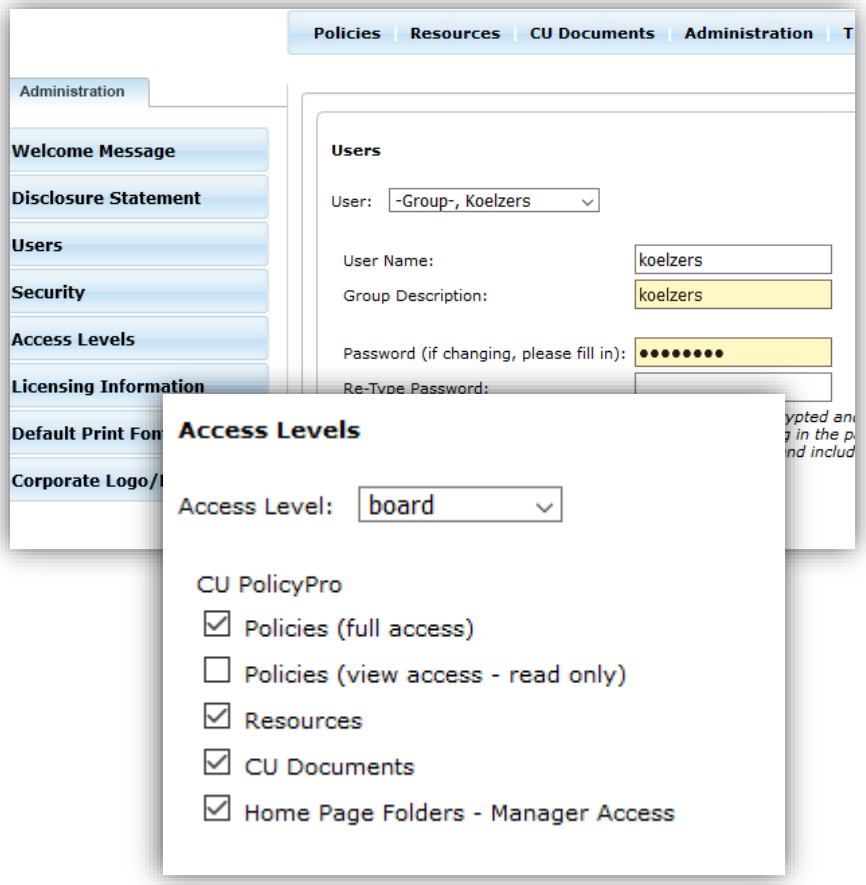
- Uploaded files and folders created under the “Resources” folder in the Files area are visible on the Resources page and available to users with appropriate access
- System documents posted by CU PolicyPro staff are found on the Resources page and are available for all users
- Posted documents can be organized in sub-folders

NEW!



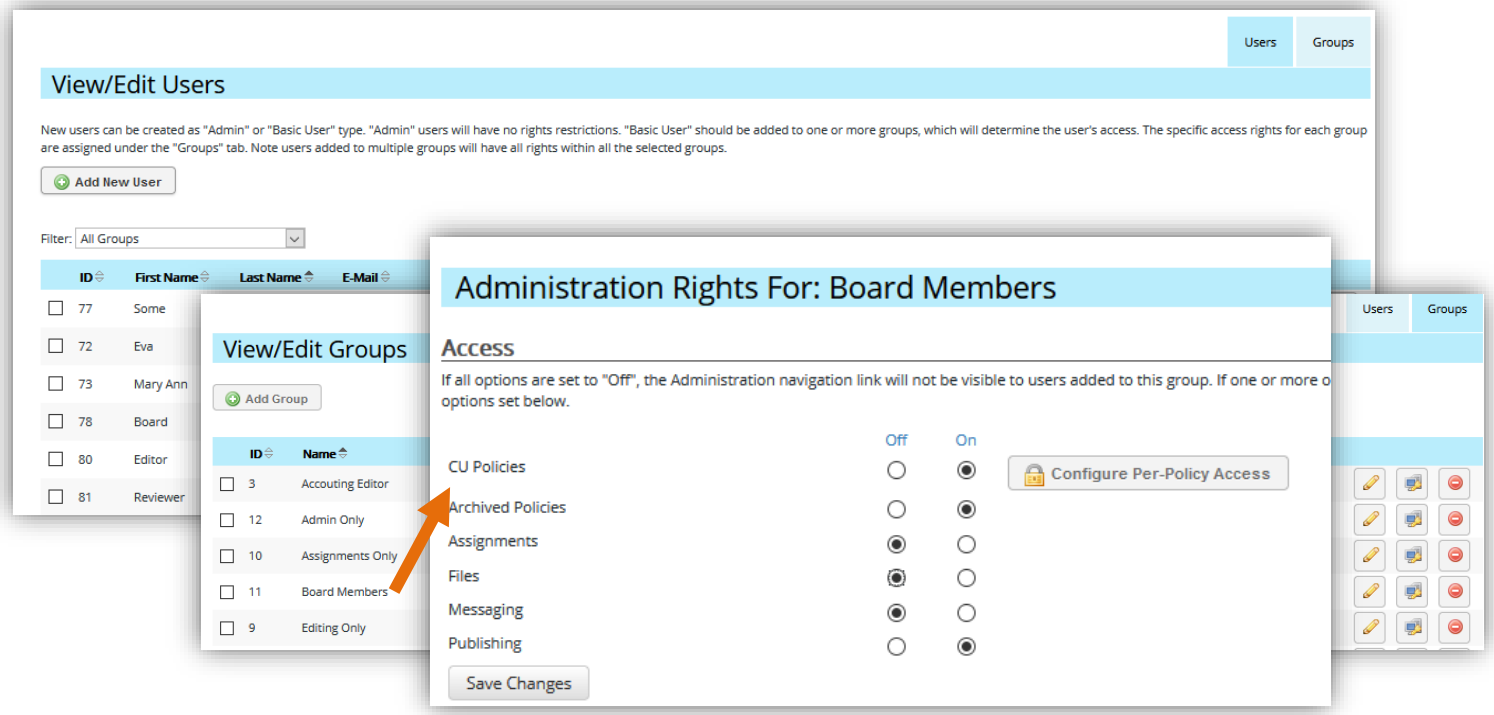
User Access

- Two default access levels (Admin and Employee)
- Custom access levels are created to assign user rights, including access to CU Documents
- Users either have access to all policies and policy functions or view-only access to all CU policies

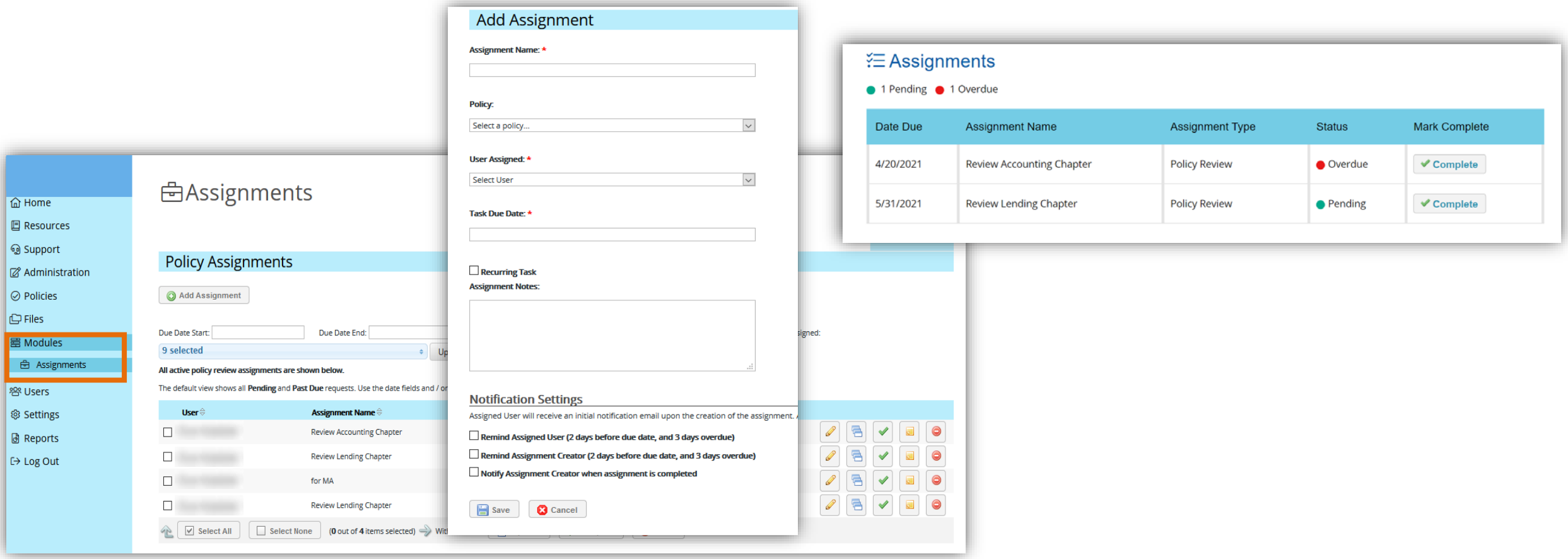


NEW!

- Four default access levels (Admin, Editor, Reviewer, Basic)
- Security Groups are used to give additional rights to non-Admin users, including access to:
  - Publish and/or use the Archive for all CU policies
  - View/edit/delete CU policies (determined down to the individual policy level)
  - View uploaded files on the Resources page



Assignments

In the new system there is a new feature that allows users to be assigned policy reviews.

- An email notification is sent to the person assigned the review, and additional notifications can be set to send notifications 2 days before and 3 days after the due date, and/or to send a notification when the assignment is completed
- A user's own assignments are displayed on the Home page