CUPolicyPro

We are pleased to announce several new features that have been added to CU PolicyPro!

Multi-Delete Option
In the Multi-Sections Functions tab, a new option for Delete Policies has been added to each system.

Things to note:
- If you choose to delete content that has sub-items (example: a chapter that has policies, or a policy with sub-policies) the system will automatically also include the sub-items for deletion. This prevents any "orphaned content" in the system.
  - If you want to retain one or more of the sub-items, they will need to move the sub-items (to another chapter or to another policy that is not being deleted)
- If multiple items are deleted, they all can be recovered in the "Restore Deleted" area of the archives

Assignments Updates
Based on multiple user requests, the Assignments area has been updated with the following features:
- Assignments can now be made for published manuals and uploaded documents
- Multiple items (policies, published manuals, or documents) can be selected as part of one assignment
- Multiple users can be selected as part of one assignment
- The assignment "notes" are now available to view on a user's assignment dashboard

Things to note:
- Assignments can only be made for one content type at a time (policies, published manuals, or documents), although multiple items may be selected from that content type
- To assign an uploaded file(s), the file must reside in the "Resources" area of the File Manager
- The assignment status will not change to "completed" until all users have completed an assignment* (this includes Recurring Assignments, which do not generate the next instance of recurrence until all users have completed the assignment)
  - The "notice of completion" email is only delivered once all users have completed the assignment (there are not separate email notices as each individual user completes the assignment)
  - *The admin (or user with "Assignment" rights) can mark the assignment as "complete" for all users if they want to close an individual assignment or generate the next recurrence of a recurring assignment.
    - The assignment status will show as complete, but the assignment listing will still indicate which users did not actually mark the assignment complete on their own.
    - An "assignment completed" email is not generated in this instance
- Assigning policies/published manuals/documents does not automatically give the user rights to view those items. The user's access rights must be set properly for the items being assigned to them.
  - If users try to access content from an assignment but do not have access to that content, they will receive an error message letting them know they need to contact an administrator to adjust their access rights.
- When an assignment for multiple users is created, only the admin (or user with assignment rights) can see all users assigned, the completion dates for each user, and any notes submitted by each user.
  - Individual users will not see information on any other users assigned

New Structure and Numbering Options
You can now create multiple levels of content, rather than the previous two-level structure (*Chapter > Policy*). You can also number the content using alpha, numeric, and dashes and periods. For instance, 1001-1, 1001A, 1001.32, R2D2, etc. are all OK.

Level 1 → Administrative (Chapter 1000)

Level 2 → Credit Union Background (Policy 1100)

Level 3 → Equal Opportunity Statement (Appendix 15)
Level 3 → Organization (Appendix 1100.2)

Numbering is now more flexible

Content Labels

Another new feature is the addition of a ***Content Label,*** which allows you to determine how any section will be named. Instead of being limited to the *Chapter* and *Policy* labels, you can now choose your own labels such as *Procedure*, *Appendix*, *Methodology*, etc. You can also choose to have no label.

The Content Label will show as part of the page heading when printing or publishing:

To help you easily update your label preferences, there is a new *Multi-Policy Function* where you can choose multiple sections and update the content label all at one time.

Frequently Asked Questions

Are there reports for the Assignments? While there is no Assignment report available at this time, information about the assignments is available in the Assignments area. There are several different filters to help you tailor the Assignment view to the information you want to see.

Can I assign files that are not in the Resources area of the File Manager? No. Any document that is assigned must reside under the Resources folder in the File Manager. Keep in mind that assigning a document(s) to a user from the Resources folder does not automatically give the user rights to view that document(s). The user's access rights must be set properly for the items being assigned to them.

I want to assign a published manual and a document to my board. Can I do that in one assignment?
No, only one content type can be selected for an individual assignment. You will have to create two separate assignments, or alternatively, you could export the published manual to PDF and upload it to the Resources area so both could be assigned as Files Review assignment.

When I am creating a File Review assignment, why do I see all of the system documentation and not just my credit union's uploaded documents?
Many credit unions require their users to review the training materials in the CU PolicyPro system. Having the system documentation (such as the Quick Guides) available allows the credit union to assign and track specific training that they require of their users.

I want my staff to review just a few policies. Is it better to assign a Policy Review or a Published Manual Review?
If a user does not have access to the CU Policies in the Administration area (basic-level or limited-level users), assigning a published manual would be the best option. If the user has access to the assigned policies in the CU Policies Manual, either choice could be utilized. Creating the assignment as a Policy Review will give the user access to any editor notes and any update information, which may be useful. Also, if they have editing rights, they could make their suggested changes directly in the policy, using the tracked changes and editor notes features to document their recommendations. Creating the assignment as a published manual will give them a single document to review, which may be convenient if the user will not be editing the policy, but only providing feedback.

I have created an assignment for multiple users, but a few people have not completed it yet. Is there a way I can close out the assignment myself?

Yes, as an admin (or a user with Assignment access), you can force the assignment status to be "completed." To do this, go into the Administration area of the system, and view the assignment listing. Click the "Complete" button (the green checkmark) next to the assignment you want to complete. If you view the list of users for that assignment, those users who did not complete the assigned will not have a "completed date" listed, and the "Completed/Assigned" column will only reflect the number of people who actually marked the assignment as complete.

I created an assignment for a user, but when they click on the link to view the content, it says they do not have access. Why don't they have access?

Assigning policies/published manuals/documents does not automatically give the user rights to view those items. The user's access rights must be set properly for the items being assigned to them. If users try to access content from an assignment but do not have access to that content, they will receive an error message letting them know they need to contact an administrator to adjust their access rights.

Now that we can change the content type, will "CU Policies" be named something else since some of the content may not be a policy?

No, we will continue to refer to the credit union's customized content as "CU Policies" or "the CU Policies Manual" as the majority of the content for most clients will still be policies.

When referring to individual sections of content, "policy," "section," and "content" may be used interchangeably.

If I duplicate a section, will the copy retain the Content Label?

Yes.

If I restore a previous version of content from the archive, what happens to the Content Label?

The Content Label will revert to whatever text was in the field at the time the content was archived. For any content that was archived prior to this update, that means the field will return to being blank and will need to be customized again.

How do I make an existing policy a sub-section of another policy?

Click on the "Move Policies" tab and choose the policy you want to move and where you want to move it. If you move a policy that already has sub-sections, the sub-sections will move with that policy. See the *Moving and Reordering Policies in the CU Policies Manual* Quick Guide for more detailed instructions.

Is there an easy way to change the numbering style of multiple policies?

Unfortunately, no. The Multi-Policy functions apply the same change to multiple policies at one time, so this would not work with numbering individual policies. This change would need to be made individually on each policy.

Is there an easy way to publish all my procedures at one time?

While there is not an automatic way to select sections with a particular content label, the content label will show when selecting the sections to include in a published manual, so you can easily pick any content with the "Procedures" label.