

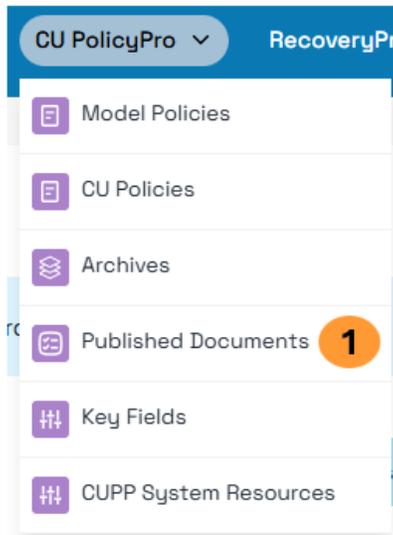
Publish and Distribute Content

Publishing is the process of selecting specific content sections to be aggregated into one printable document. Published documents can be used to distribute the credit union's policies and procedures, and/or the BCP Plan to staff, board, or examiners.

This process works the same way for both CU PolicyPro and RecoveryPro. CU PolicyPro will be used in the screenshots of this User Guide for illustrative purposes.

Create a Published Document

1. From the product's navigation menu, choose the Published Documents option.



2. Click the "Create New" button – a form will open for you to customize various options for the published document.
3. **Published Document Name:** the title for the published document. This cannot be changed once the document is published. The title **cannot** be changed once the document is published.
Tip: use a descriptive name to easily identify what content is in each document
4. Additional options used to customize the published document:
 - A. Add Logo to title page
Note: The option to add your logo will not show unless the logo graphic has been added to the Settings area (found under Admin > Settings).
 - B. Add Organization Name to title page

- C. Add Published Date to title page (recommended)
- D. Include Section Numbers in the Published Document
- E. Additional Text on Title Page

5. **Roles Authorized for Viewing:** Use the dropdown to select which Roles can view this published document. Role selection can be changed after the content has been published.

To allow all users with access to a particular product to view the published document, choose the "Any Logged-in CU PolicyPro User" or "Any Logged-in RecoveryPro User" role.

If no roles are selected, the published document will only be visible to Admin-level users and users with "Editor" or "Reviewer" role for that product

6. **Select Content to Include:** Click the " Select Content" button to open a pop-up screen and select the specific sections of content to be included in this published document. The selected content **cannot** be changed once the document is published.

Use the checkboxes to select specific sections of content or use the “Select All” options to choose all available content, or all sub-content for a chapter or sub-section.

Select Content

Select one or more content sections to include in the published document. If a section is in Draft mode and also has a previously published version, please choose which one should be included in this published document.

Select All

Chapter 1000 : Administrative All Sub-Content

Policy 1100 : Credit Union Culture and Governance | Select a Version All Sub-Content

1100.10 : Organization

1100.12 : Board of Director's Duties

1100.13 : Compensation, Reimbursement, and Indemnification

1100.14 : Bond and Insurance Coverage

1100.15 : Education and Volunteer Training Guidelines

1100.16 : Strategic Planning

1100.17 : Audits

Note: Publishing typically includes the current content found in the editor of CU Policies or CU BCP. However, content set to DRAFT mode will include an option to choose the DRAFT content (which includes the content currently in the content

editor) or the *Previously Published Content*, if available, (which includes content from the last published version instead of the current content in the editor).

Typically, the *DRAFT* setting is selected when a particular section of content needs to be included in a published document, but the content currently in the editor is not yet finalized. Content must be set to *DRAFT* in the editing area prior to publishing in order to see this option.

Important! After content has been selected, you must scroll to the bottom of the pop-up box and click the "Done" button. This will save your selections and close the pop-up screen.

7. **Status:** "Active" documents will be available to authorized users to view. "Inactive" documents are only available to Admins, Editors, Reviewers, or users who have been given full Publishing access to view.
8. Click "Publish."

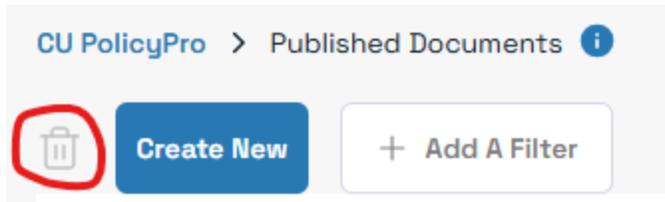
Manage Published Documents

In the Published Document listing there are five action icons for each document:

1. **Edit:** Change Role access or Status (Active/Inactive) for the published document.
Note: The document must be re-published to make any content or title changes.
2. **Assignment:** Create an assignment for users to review this published document.
3. **Word:** Download a Word version of the published document.
4. **PDF:** Download a PDF version of the published document.
5. **View:** View and Print the published document.
6. **Delete:** Delete the published document. Deleted documents can be recovered under the "Deleted Published Documents" tab.

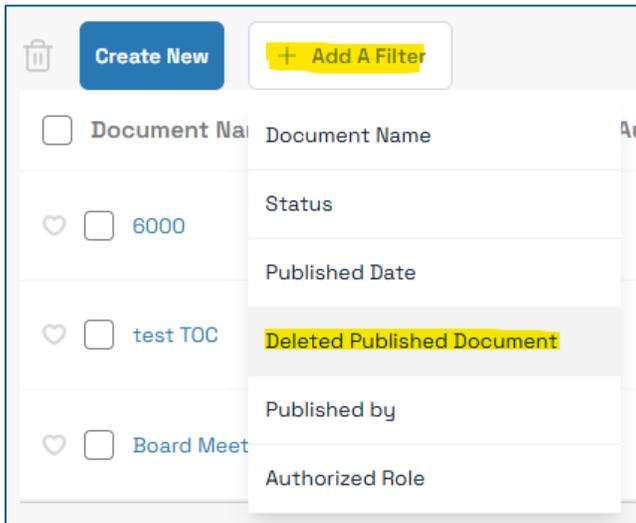


Note: Multiple published documents can be deleted at one time by selecting the checkbox next to the applicable documents and clicking the "delete" icon in the upper left side of the screen.



Restore Deleted Published Documents

1. In the Publishing area, use the Filter option to select “Deleted Published Document”



2. From the list of Deleted Published Documents, click the “Restore” icon

