



Technical Updates

November 2010

UNDER MANUAL BUILDER

General Updates

1. Clicking on “Manual Builder” will now take you directly to the Working Manual. Note: The “Rename” function has moved and is addressed below in item #2 and item # 18
2. You can rename the entire manual once you have opened the Working Manual. This function is available directly above the “Getting Started” documents when you first enter Working Manual. You can also get to this area by clicking on the “Manual Administration” folder. The name of the manual is no longer tied to the name of the published manual document (see item #18)
3. There is now a Search feature available within the Working Manual, the Master Manual, and the Archive. The search is located at the top of the navigation for each section. When you search, only those policies containing the search word(s) will show in the navigation. Note: If you do any work on a policy from the search results, the search results will clear and the full navigation will return. You will need to do the search again to see the results again.
4. A Editor’s Note field has been added below the content area. Editing notes can be added to help user’s know what has been customized and by whom. When notes are saved, the notes show below and include the Note, the User Name and the Date/Time the note was added. The 5 most recent editing notes will be shown. Additional information: Notes are only available for policies in the Working Manual. If a policy is removed from the manual, the notes are also removed . If a policy is archived, the notes are not archived with the policy.

Content Editor Updates

5. Fonts are now show in standard pixel size (i.e 10pt, 12pt) rather than Small/Medium/Large.
6. The standard PASTE icon has been removed. PASTE PLAIN TEXT and PASTE WORD are still available. When pasting using CTRL+V or right clicking to paste will default to PASTE AS PLAIN TEXT. This will eliminate many of the formatting issues that come from pasting from other sources (Word, etc).
7. The Toolbar area has been cleaned up. “Archive” is now below the content screen. “Revised Date” field automatically pops up a calendar if clicked. “Remove Date” button has been replaced by an X to save space.
8. The Key Fields area only shows below the content if there are Key Fields in that content. The color has changed from bright yellow to blue.

9. The issue with the “content may not be saved” message showing up too frequently has been resolved. This message now only appears when content truly has been changed but not saved.
10. For each top level Chapter page, custom code can be added to the page which will automatically generate the Table of Contents for that chapter, which will exclude all policies within the chapter that are currently set to DO NOT PUBLISH. This will allow a custom TOC to be created at the chapter level when creating mini-manuals. This code must be manually inserted into each chapter page in order to take effect (it only needs to be added once to take effect from this point forward).
11. A BOARD APPROVED DATE field has been added
12. A REVIEWED DATE field has been added

Manual Section Management Updates

13. Under MANUAL TOOLS, in the ADD/REMOVE section has been changed to ADD SECTION (the REMOVE section function is no longer available in this section). To remove a policy, clients will use the MULTI-DELETE UTILITY, even to remove a single policy.
14. In the ADD SECTION area, you can now create multiple policies at one time.

Published Manual Area
15. In Published Manuals (and in Preview mode), the word “Section” will now read “Chapter” at the Chapter level, and “Policy” at the Policy level. This will only apply to published manuals from this point forward. Any previously published manuals will contain the old verbiage.
16. Published manuals can now be deleted in bulk instead of one at a time under a new section – DELETE PUBLISHED MANUALS
17. The “Manage Published Manuals” link has been renamed “View and Post Published Manuals”. Users can now select multiple manuals at one time to show (or be removed) from the home page under “Manager” or “Employee” manuals.

At the point of publishing the user now has the following options:

18. The Published manual document can now be named at the point the manual is published. It is no longer tied to what the manual itself is named, although the manual name will by default pre-fill the Published Document Name Field.

19. Credit Unions can add a CU logo (in the Administration area) and choose if it should display on the title page of the published manual.
20. Additional verbiage can now be added on the title page.
21. Policies can now be ordered within the chapter by the policy number or alphabetical by policy title.
22. CUs can now choose if the policy number prints on the published manual or not. The policy title will always print.
23. CUs can now choose if the main chapter page will print or not print within a particular published manual.. This page must be available for any policy within the chapter to be available for publishing, but CUs do not always desire for this page itself to appear in the published manual. This options gives the user the choice. This option does not suppress any policies within a chapter from printing (that must still be done within the DO NOT PUBLISH options), it simply determines if the chapter page(s) print or not.

Master Manual/Archive Updates

24. When displaying content in the Master Manual or Archive, the policy number now shows in the title.
25. A Multi-delete function has been added to Archive to allow deletion of multiple policies at one time. It is the last item in the navigation. When viewing the list of items that can be deleted, the sort order is by archive date, in descending order.
26. The policies in the Archive can now be sorted by policy name, policy number or archive date. The default sort is by archive date.

Key Fields Updates

27. When entering Key Fields from a within a policy, the form now closes automatically once the Key Field has been updated. Users will still need to refresh the screen (click SAVE) to see the key field content appear.
28. The Key Field entry form has been updated to with clearer titles and more consistent spacing
29. The Key Fields Database found under MANUAL SECTION MANAGEMENT now allows for multiple key fields to be viewed and edited at one time

New Area – Reports – Update

30. A new section has been added in the Working Manual area for reports.
31. The Key Fields Report has been moved to the REPORTS section. It can now be sorted by Key Field Number, Key Field Description, or Key Field Content.
32. A new report called “Working Manual Report” has been added to the REPORTS section. This report will show all policies in the Working Manual, when each policy was Last Updated (this is based on the last time the SAVE button was pushed), and Revised Date (this is based on a date in the REVISED DATE field). If your credit unions currently does not use the REVISED DATE field to track Revised Date, this field may show as NONE. Additional Information: This report now also shows last updated date, board approved date, and date that the policy was added to the Working from the Master. Please note that “Last Saved” and “Added to Working from Master” dates were not previously tracked so any policies saved or moved to working from master prior to November 24, 2010 will not have a date available. These dates will only apply for items saved or moved to working from master from this point forward.
33. A new report is available showing if the Working Manual content matches or does not match the Master content. If there is a difference, the report cannot determine what is different, only that a difference exists. It will also report if a policy exists that is not part of the Master.
34. A new report is available showing all NOTES for all policies is now available in the REPORTS section.

STORAGE AREA

1. Documents in the Storage area are now sorted by default by the document title. Note: The sort order is Unix sort, which can give slightly different results than traditional alpha sorts. Character/numbers are first, then upper case alpha, then lower case alpha. Items posted to the home page will always be sorted (Unix sort) by document title.
2. Documents in the Storage can now be also be sorted by size or last updated date. Note: Changing the sort is temporary. When you add something new, the list will resort alphabetically.

3. When changing the name of a file in Storage, the file type extension is automatically added in, which will eliminate any issues of the system being unable to associate the correct program to open the file.
4. Users now have the ability to upload multiple files at one time

ADMINISTRATION AREA

1. Passwords have been encrypted so they are no longer visible to users in the Admin area. Admins can still change passwords for other users.
2. All users can now change their own passwords. This is a new feature available from the home page.
3. Password requirements have been strengthened. Passwords are required to have 6 characters, including one capital letter and one number. Existing passwords will not be affected, however, if a user decides to change their password, the new requirements would then be enforced.
4. "Email" has been added to the ADD USER Form.

LIBRARY

1. A second instance of the system documentation (User's Guide, Key Fields, etc) has been added to the Library under a folder called SYSTEM DOCUMENTATION. This just makes it easier for users to access this information. It is still available in the Working Manual when the user is clicked directly on the MANUAL ADMINISTRATION folder.