

This list shows major projects in the pipeline for upcoming releases. Most releases will also contain a number of smaller program mods and fixes not outlined here. All release dates and projects listed are tentative and subject to change, and we reserve the right to delay slated projects based on QC test results.

## 2012 Releases

11.8	Determine Final Release Makeup	Beta	Online CUs	CU* Partners	Self Processors	Misc Notes
		--	<b>April 22</b>	April 22	With 12.0	
Beta Clients:	n/a					

Proj#	Description
26811	Change notice printing to skip bad addresses
29830	Highlight for below par value or negative balance shares
30463	Add selection buttons for Money Movement Analysis
30669	Add toggle for disbursement limit on New/Closed Account dashboard
30909	Add detail/summary selection option on Participation Trial Balance
31398	Add test run option for existing service charge program
31424	Fix to have phone fee description used from the fee configuration
31433	Change to NCUA share ins report to separate neg balance amounts
31533	Add auto security to inquiry and phone
31557	Add ATM/debit card search in global search
	Misc changes for new edits and screen standards

CU* Spy	QC	Beta	Online CUs	CU* Partners	Self Processors	Misc Notes
	March 19	April 17	<b>May 7*</b>	May 7*	May 7*	CU*Spy
Beta Clients:	Cumberland (in-house), Frankenmuth (CU*Spy), Sentinel Fed (CU*Spy), Western Districts					

Proj#	Description
30198	CU*Spy e-Statement presentation enhancements/rewrite

\*Actual release date for in-house eDOC clients will be scheduled with each individual CU.

11.8.??	Determine Final Release Makeup	Beta	Online CUs	CU* Partners	Self Processors	Misc Notes
	--	--	<b>May 20</b>	?	With 12.0	GOLD update
Beta Clients:	--					

Proj#	Description
30296	CPI for SWBC and Allied – release on demand/live beta
?	Internal CUSC/FSCC shared branch adjustments

12.0	Determine Final Release Makeup	Beta	Online CUs	CU* Partners	Self Processors	Misc Notes
	May 1	June 24	<b>July 22</b>	July 29	August 13-14	CUBASEPTF→ CUBASE
Beta Clients:	TBD					

Proj#	Description
13120	Recurring billing
26700	Duplicate item detection for incoming share draft files
27412	New Data Center Employee Security report
28026	Allow check or transfers on dividends to base share
28152	Smart Messaging for <b>It's Me 247</b>
28980	New inquiry/report to review enrolled/suspended Marketing Club members
29176	Adding Mobile Web Stats to the ARU/Online Banking Dashboard
29178	(was 24407) Create "No Notice Printed" option for Courtesy pay notices
29231	Loan Dashboard Enhancements (add Business Unit & Participation Loan

	portion breakdowns to Loan/Share Trial Bal Review and Collections Dashboard)
29286	New programs to purge instant issue log message
29453	Learn from Peer – Loan Rates analysis
29556	Early Warning Bulletin (EWB) and card status enhancements for ATM/debit/credit
29557	Automating CU reports and Queries
29572	Abnormal Activity Monitoring
29661	Enhance tax maintenance screens for new TAX structure
29705	My Other Accounts (“See/Jump” for CU*BASE)
29767	“Permanent” Underwriting Comments
29966	Processing credit reports to CU*Spy (change to handle adds/deletes sequentially)
29905	Enhancement to configuration for collateral type (allowing overlapping years for incoming Dealer Track products)
30272	App Check
30384	Membership Retention/Age Group Analysis Dashboard
30418	Concentration Risk
30536	Expand Loan App for unlimited employment/income sources
30611	ATM Activity Dashboard
30777	Account Retention/Age Group Analysis Dashboard
30778	Minor verbiage changes to CU master profile screen
30866	Additional fixes for User Profile deletions
30888	Mortgage Payoff Calculator
30984	ANR/NSF Fee options: Available vs Current Balance
31095	Retain multiple iterations of EOM files
31304	New YTD Dividends/Interest Report
31356	Add confirmation for suspending a statement format
31384	Add ability to select 1 or 2 backup tapes – Ops project for self-processors
31573	ATM Hold maintenance (release batches of holds based on ATM deposits)
31696	Tiered Services analysis dashboard enhancements part 1 (auto-select last four months, add column totals, remove zero-score members)

## CFS

	QC	Beta	Online CUs	CU* Partners	Self Processors	Misc Notes
		Aug 1	<b>With 12.1</b>	With 12.1	With 12.1	Early beta for Day Air and others
Beta Clients:	Day Air, TBA, Community					

Proj#	Description
30513	SSO for CFS (CUSO Financial Services)
31230	CFS OTB integration (for Day Air CU)

## 12.1

	Determine Final Release Makeup	Beta	Online CUs	CU* Partners	Self Processors	Misc Notes
	Sept 1	Oct 21	<b>Nov 18</b>	Nov 25	With 12.2	
Beta Clients:	TBD – no shared branch CUs					

Proj#	Description
24042	Standard Bonus/Rebate
25932	<b>ID Types (foreign ID handling)</b>
28764	Transaction date terminology
29032	General Transaction Register Enhancements (for monitoring Reg E)
29254	Add ID type to APVEND for 1099 reporting
29259	Add column for branch to the BSA/SAR report
29261	Change Decision Matrix active period from months to days
29548	Add closed seq# to MASTRL
29789	Synchronize ID flag in GOLD when photo ID is scanned (ProDOC integration enhancement)

29965	ALM for McQueen
30022	Vendor/Vendor services configuration and cross reference (for Ops/CSRs)
30406	Expand AUDICC for more tracking detail (internal architecture project)
30912	PLI Trial Balance enhancements (select multiple categories)
30941	5300 – Add section headings to the Call Report Data screen
31194	Toolbox updates for programmers/other data center staff
31171	5300 – Allow multiple automation routines to a single Account Code
31312	Allow custom tracker descriptions
31494	5300 – Updates to Loan Classification Report
31537	Teller Currently Serving – print name of person served on teller receipts
31814	Loan to Value Report Enhancements

<b>It's Me Nav-1</b> Beta Clients:	QC	Beta	Online CUs	CU* Partners	Self Processors	Misc Notes

Proj#	Description
30512	New navigation and infrastructure for <b>It's Me 247</b> online banking
31571	Update Fiserv SIS file to support Mobile Web Easy Pay
30706	Mobile Web bill pay via Fiserv

<b>12.2</b> Beta Clients:	Determine Final Release Makeup	Beta	Online CUs	CU* Partners	Self Processors	Misc Notes
		None	<b>Dec 9</b>	Dec 16	Dec 17-18	Tax <u>only!!!</u>

Proj#	Description
	Tax file changes/IRS mandates

## 2013 Releases

<b>12.3</b> Beta Clients:	Determine Final Release Makeup	Beta	Online CUs	CU* Partners	Self Processors	Misc Notes
		n/a	<b>?? Jan/Feb</b>	??	With 13.0	GOLD update only

Beta Clients: CANNOT HAVE A BETA FOR THIS (FSCC/CUSC PROJECTS)

Proj#	Description
27620	Amend FSCC program to report transactions by branch
30832	Clean up FSCC & CUSC shared branch config
31490	Create a way to link to the Open/Closed accounts dashboard analysis from other dashboards (infrastructure only)

<b>13.0</b> Beta Clients:	Determine Final Release Makeup	Beta	Online CUs	CU* Partners	Self Processors	Misc Notes
		February 1	March 10	<b>April 14</b>	April 21	May 12 <b>(Sunday?!)</b>

Proj#	Description
27094	Service Charge Rewrite (handling custom fee requests; post on loan accts, add'l options for running annually on anniversary month, etc.)
28429	Promise-to-pay collections enhancement
29034	Marketing Club aggregate balance requirements by product
29907	TCD/TCR fix for auto mix – calculate “remaining” amount after a change
30021	Collections revamp to solve problem of missing Last Contact Dates
30104	ATM/Debit limit checking / trans counters

30150	Skip Pay for consumer loans
30241	Credit Card fine handling change
30731	Promise Deposits (online deposits honor system for <b>It's Me 247</b> )
31154	Interface to Legacy check printer
31210	Change the contract variable rate payment recalculation
31232	ANR fee caps
31700	Tiered Service analysis dashboard enhancements part 2 (new front-end filters)

## 13.1

Determine Final Release Makeup	Beta	Online CUs	CU* Partners	Self Processors	Misc Notes
May 12	n/a	<b>June 16</b>	June 23	With 13.2	GOLD update only if needed
Beta Clients: n/a					

Proj#	Description
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## 13.2

Determine Final Release Makeup	Beta	Online CUs	CU* Partners	Self Processors	Misc Notes
July 1	August 11	<b>Sept 15</b>	Sept 22	Oct 13 (Sunday)	
Beta Clients: TBD					

Proj#	Description
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- 25885 Loan coupons via **It's Me 247**
- 26585 Architectural project: handling 9999 notes on Trackers
- 30533 Improvements to "Show All Codes" window in lending queue
- 30569 Enhance freeze processing to differentiate between manual and system freeze
- 30575 Collection Notice expansion (for mortgages/credit cards)
- 30580 ANR notices for joint owners
- 31536 Enhanced Tools for Written Off Loans
- 30996 Associated Apps for Wisconsin

## 13.3

Determine Final Release Makeup	Beta	Online CUs	CU* Partners	Self Processors	Misc Notes
Beta Clients:					

Proj#	Description
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### In the Pipeline But Not Yet Slated for a Release

Proj#	Description
24601	Bring invalid e-mails back to CU*BASE
27808	PIB re-design
27216	Add more return email addresses (e-statements separate from Member Reach messages, for example)
27993	Tiered Services/Marketing Clubs additions: points for ACH loan payments, valid email address, e-Notices/e-Alerts, Mobile Web/Text, etc.
28675	Enhanced certificate redemption options
29134	Dividend Disbursements via ACH
29597	Allow for a menu option to balance corporate drafts/money orders
29872	Expand Fixed Assets subsidiary for Personal Property Tax Schedule IDs

<b>29875</b>	Creating PDF from spool file
<b>30344</b>	File Upload/Downloads (new technique not requiring Client Access) – was 28446
<b>30587</b>	Loan Workflow Styles
<b>30887</b>	LOC disbursement controls
<b>31134</b>	Develop instant card issue feature for online credit card processing
<b>31191</b>	AFT change to synch up transfer date and day
<b>31248</b>	OTBFT – payments to OTB accounts via recurring AFT
<b>31249</b>	A2AFT – recurring A2A transfers
<b>31292</b>	Add Blocked Persons warning to loan application process
<b>31305</b>	Add access to print Misc Member Account forms from Name/Address maintenance
<b>31551</b>	Option to resequence member transactions (OPER access only)
<b>31590</b>	Add config for showing the “hint” for Name ID verification
<b>31611</b>	Who Was Served - enhancements to Teller Currently Serving & It’s Me 247 Jump (includes consolidating “Trans History” in Inquiry & Phone Op)
<b>31673</b>	ProDOC v.6.0.4.28
<b>TBD</b>	Electronic filing of CTRs
<b>TBD</b>	Other projects to beef up the Toolbox and eliminate command line access for programmers/data center staff