CU*BASE 15.0

Menu Changes

Attention: CU*BASE Employee Security Officers

Online CUs	Site-Four	Self-Processing CUs
April 19, 2015	**April 19, 2015**	**May 11-12, 2015**

To Do BEFORE the Release

During the week *prior* to the release, print a report showing your current employee menu security settings. This will make it much easier to know whose security will need to be adjusted once the release goes in.

1. From the Auditing Functions menu (MNAUDT), choose "Employee Security Audit Report"

2. Choose Menu Security Audit Report and pick a printer (use HOLDxx if you don't need a hard copy)

3. Use Enter, then on the next screen enter a menu name (use the list of menus on the following pages as a guide)

4. If only one option on that menu will be changing, enter that option #; otherwise leave the *Menu option* field blank and the report will include all options on that menu, as follows:

```
 4/09/10  14:07:54                        TEST CREDIT UNION                        LEMPAU10        PAGE     1
    RUN ON   4/09/10                 EMPLOYEE SECURITY AUDIT REPORT                               USER DAWNM
                                            AS OF 4/09/10
*** MENU SECURITY -  MNGELE   General Ledger
EMP                            MENU OPTIONS Y = ENABLED, BLANK = ENABLED, N = NOT AUTHORIZED, * = NOT A MENU OPTION
ID                             01 02 03 04 05 06 07 08 09 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29
AA  ANNIE ANSWERS              N  N  Y  N     N  N  *  Y  N  N  N  N  *  *  N  N  N  N  Y  Y  N  *  *  *  *  *  *  *
BB  BETSY EMPLOYEE             Y  N     N        *  N  N     N  N  *  *  N  Y     N  Y  Y  N  *  *  *  *  *  *  *
BR  BILL TESTING               N  N  N  N     N  *  Y  N     N  N  *  *  N  Y     N  N  Y  N  *  *  *  *  *  *  *
B1  JANE VANPERSON             Y  N     N        *  N  N     N  Y  *  *  N  Y  Y  Y  N  Y  N  *  *  *  *  *  *  *
B2  JOHN A TELLER              Y  N  Y  N        *  Y  N     N  N  *  *  N  N  N  N  N  N  N  *  *  *  *  *  *  *
CH  CARRIE HELPER              Y  N  N  Y     N  *  N  N  N  N  Y  *  *  N  N  N  Y  N  N  N  *  *  *  *  *  *  *
```

5. Repeat for all menus that are changing with this release

To Do AFTER the Release

Compare the menu changes on the following pages to your report, looking for which employees previously had access to those options. If necessary, after the release goes in use the "CU*BASE Employee Security" feature to adjust employee access to these commands.
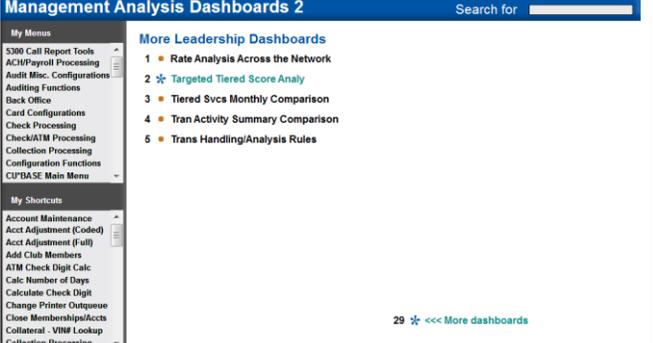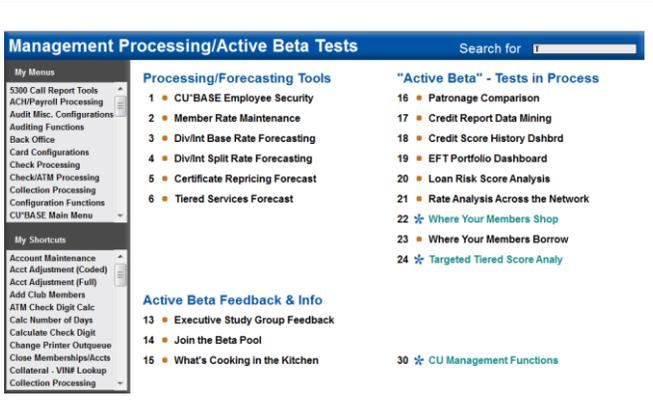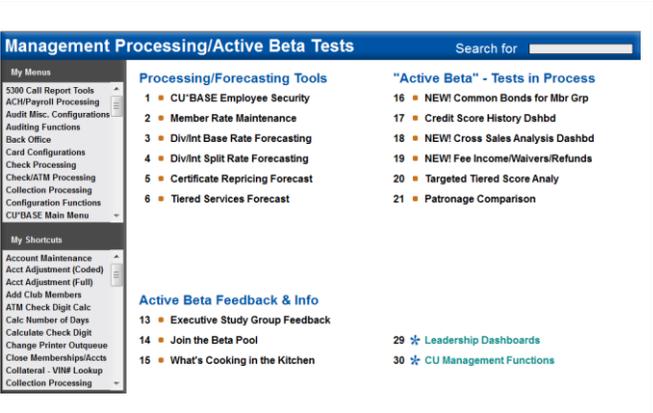
1. From the Management Processing/Active Beta Tests menu (MNMGMT), choose "CU*BASE Employee Security"

2. Use "Menu Security" to access the Update Menu Security screen

3. Use "Alternate View" to sort the list by menu name

4. Type the menu name and use Enter to display all users who currently have access to that menu

5. Select one or more users in the list (hold Ctrl and click to select multiple names), then use Edit to adjust access to individual menu commands
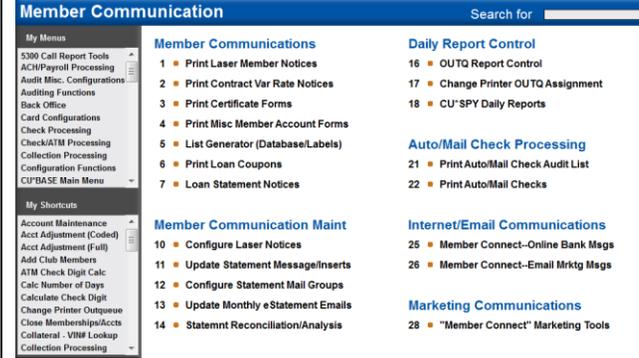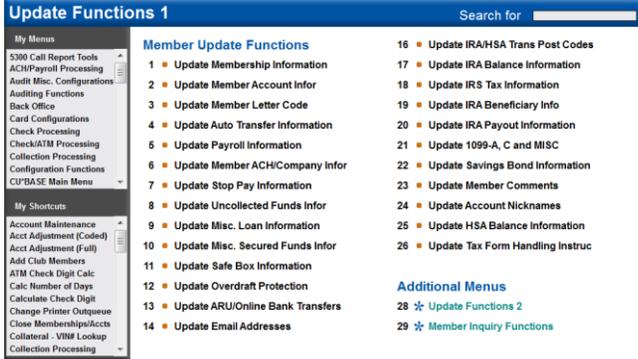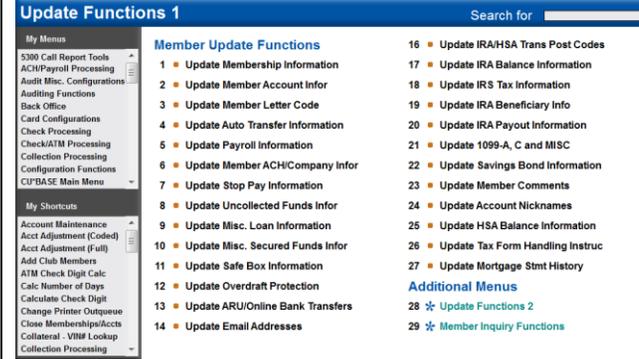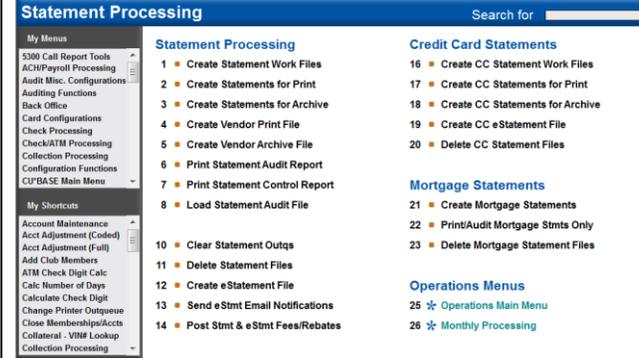
Remember that if a person already had access to the commands on a particular menu, new commands added to that menu will be set up to allow access (checked) for that person automatically.

Menu Changes

Menu Name	Old Menu	New Menu	Comments
MN5300			▪ Added the "Tools for Gathering 5300 Data" section (all of these reports already exist on other menus) ▪ Rearranged other existing items (#9-10, 16) to #3-5 as shown
MNCNFD			▪ Changed #11 Fee Income/Waiver Analysis to jump to the enhanced dashboard on the Active Beta Tests menu (MNMGMT)
MNCNFE			▪ Added new #10 Config Monthly eStatement Emails ▪ Added new #11 Config CU FROM Email Addresses ▪ Changed verbiage only on #1

Menu Name	Old Menu	New Menu	Comments
MNCNFF	NEW		▪ This new menu contains items that were formally on the Loan Products config menu MNCNFB ▪ Added new #5 Write-off/Charge-off Code Config
MNCOLL			▪ Changed verbiage on #14 as shown
MNMGMA			▪ Changed #5 and #6 to launch the tools instead of jumping to the Active Beta Tests menu

Menu Name	Old Menu	New Menu	Comments
MNMGMD	**Management Analysis Dashboards** — Search for **Leadership Dashboards** 1 5300 Call Report Ratios Dashbrd 2 Patronage Comparison 3 ARU/Online Banking Stats Dashbrd 4 ATM Network/Terminal Activity 5 Budget Review/Analysis 6 Check Processing Stats Dashboard 7 Collections Dashboard/Summary 8 Contingent Liability Analysis 9 Credit Report Data Mining 10 Credit Score History Dshbrd 11 EFT Portfolio Dashboard 12 Fee Income/Waiver Dashboard 13 Financial Statement Review 14 Loan App Monthly Stats Comparisn 15 Loan Concentration Risk by Mbr 16 Ln Portfolio Concentration Risk 17 Loan Queue Activity Tracking 18 Loan Risk Score Analysis 19 Loan/Share Trial Bal. Review 20 Membership Summary Comparison 21 All Accounts Analysis Dashboard 22 All Memberships Analysis Dshbrd 23 NSF Statistics Dashboard 24 Package Loans to be Sold 25 Rate Analysis Across the Network 26 Targeted Tiered Score Analy 27 Tiered Svcs Monthly Comparison 28 Tran Activity Summary Comparison 29 Trans Handling/Analysis Rules	**Management Analysis Dashboards 1** — Search for **Leadership Dashboards** 1 5300 Call Report Ratios Dashbrd 2 All Accounts Analysis Dashboard 3 All Memberships Analysis Dashbrd 4 ARU/Online Banking Stats Dashbrd 5 ATM Network/Terminal Activity 6 Budget Review/Analysis 7 Check Processing Stats Dashboard 8 Collections Dashboard/Summary 9 Common Bonds for Any Mbr Group 10 Contingent Liability Analysis 11 Credit Report Data Mining 12 Credit Score History Dshbrd 13 Cross Sales Analysis Dashboard 14 EFT Portfolio Dashboard 15 Fee Income/Waiver/Refund Dashbrd 16 Financial Statement Review 17 Ln Portfolio Concentration Risk 18 Ln Write-off/Charge-off History 19 Loan App Monthly Stats Comparisn 20 Loan Concentration Risk by Mbr 21 Loan Queue Activity Tracking 22 Loan Risk Score Analysis 23 Loan/Share Trial Bal. Review 24 Membership Summary Comparison 25 NSF Statistics Dashboard 26 Package Loans to be Sold 27 Patronage Comparison 29 More dashboards >>>	▪ Reorganized all commands to re-alphabetize ▪ Changed several items to launch the tools instead of jumping to the Active Beta Tests menu ▪ Added new Active Beta items ▪ Created a second Dashboards menu MNMGME for overflow
MNMGME	NEW	**Management Analysis Dashboards 2** — Search for **More Leadership Dashboards** 1 Rate Analysis Across the Network 2 Targeted Tiered Score Analy 3 Tiered Svcs Monthly Comparison 4 Tran Activity Summary Comparison 5 Trans Handling/Analysis Rules 29 <<< More dashboards	▪ New menu for the overflow of dashboards from the Management Analysis Dashboards 1 menu (MNMGMD)
MNMGMT	**Management Processing/Active Beta Tests** — Search for **Processing/Forecasting Tools** 1 CU*BASE Employee Security 2 Member Rate Maintenance 3 Div/Int Base Rate Forecasting 4 Div/Int Split Rate Forecasting 5 Certificate Repricing Forecast 6 Tiered Services Forecast **Active Beta Feedback & Info** 13 Executive Study Group Feedback 14 Join the Beta Pool 15 What's Cooking in the Kitchen **"Active Beta" - Tests in Process** 16 Patronage Comparison 17 Credit Report Data Mining 18 Credit Score History Dshbrd 19 EFT Portfolio Dashboard 20 Loan Risk Score Analysis 21 Rate Analysis Across the Network 22 Where Your Members Shop 23 Where Your Members Borrow 24 Targeted Tiered Score Analy 30 CU Management Functions	**Management Processing/Active Beta Tests** — Search for **Processing/Forecasting Tools** 1 CU*BASE Employee Security 2 Member Rate Maintenance 3 Div/Int Base Rate Forecasting 4 Div/Int Split Rate Forecasting 5 Certificate Repricing Forecast 6 Tiered Services Forecast **Active Beta Feedback & Info** 13 Executive Study Group Feedback 14 Join the Beta Pool 15 What's Cooking in the Kitchen **"Active Beta" - Tests in Process** 16 NEW! Common Bonds for Mbr Grp 17 Credit Score History Dshbd 18 NEW! Cross Sales Analysis Dashbd 19 NEW! Fee Income/Waivers/Refunds 20 Targeted Tiered Score Analy 21 Patronage Comparison 29 Leadership Dashboards 30 CU Management Functions	▪ Returned several of the Active Beta Tests items to their original locations on MNMGMD and MNMGMA ▪ Added new #16 Analyze Common Bonds for Mbr Grp ▪ Added new #18 Cross Sales Analysis Dashboard ▪ Added new #19 Fee Income/Waivers/ Refunds

Menu Name	Old Menu	New Menu	Comments
MNPRTC			▪ Changed #13 (this program now only allows updates to the email notification messages, not the eStatement config as before)
MNUPDT			▪ Added new #27 Update Mortgage Stmt History **SPECIAL NOTE:** Credit unions participating in the mid-month mortgage statements beta test that had this feature on their Custom menus will now be directed here for this command.
MNOP07 (OPER > #6) *(For self processors only)*			▪ Added new #23 Delete Mortgage Statement Files