

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				*	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	Y	N	Y	N	*	*	*	*	*	*	*
B2 JOHN A TELLER	Y	N	Y	N				*	Y	N	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.

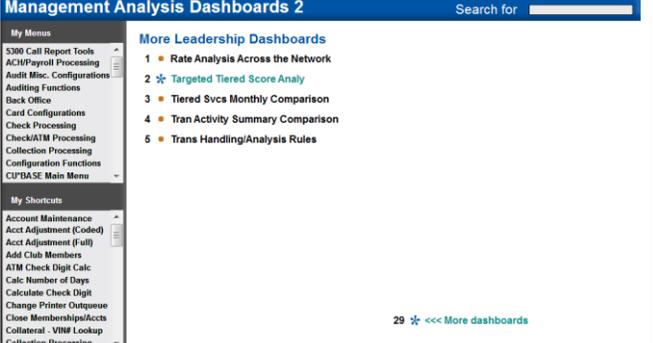
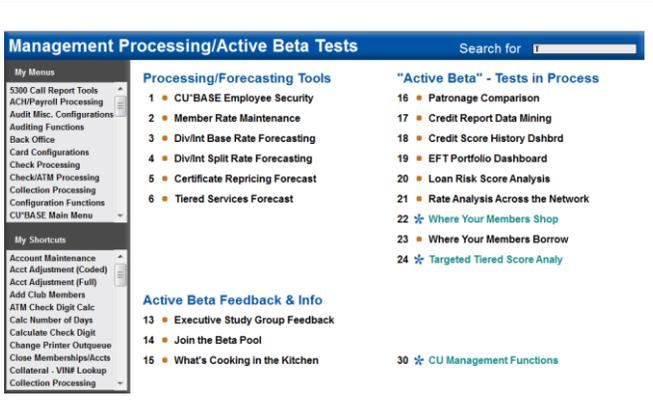
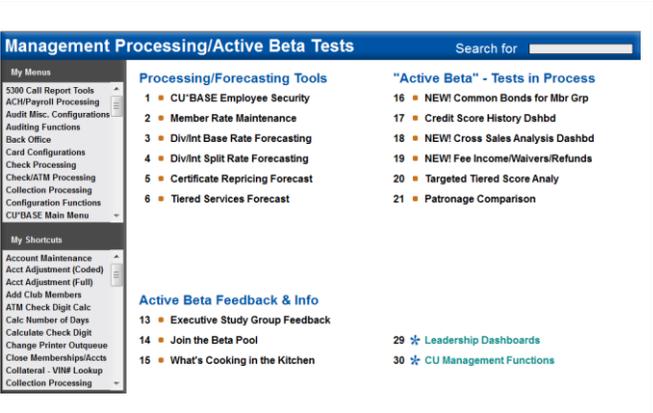
1. From the Management Processing/Active Beta Tests menu (MNMGMT), choose "CU*BASE Employee Security"
2. Use "Menu Security" to access the Update Menu Security screen
3. Use "Alternate View" to sort the list by menu name
4. Type the menu name and use Enter to display all users who currently have access 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

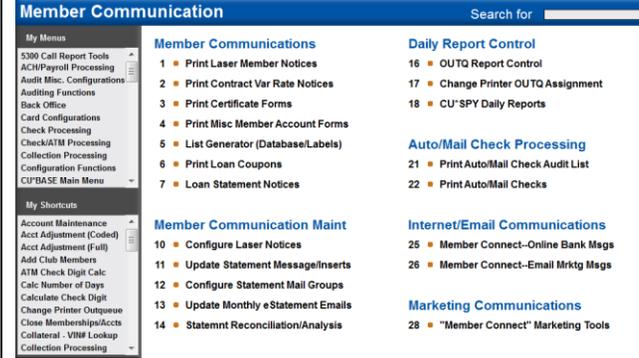
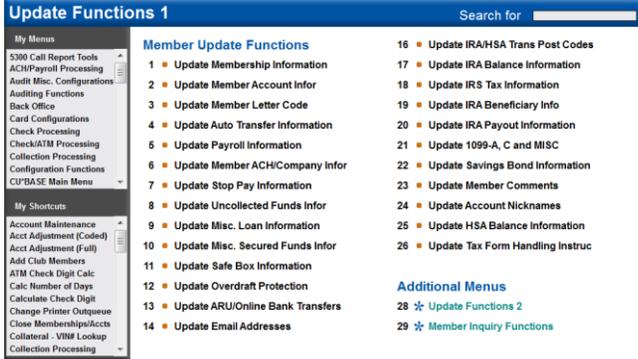
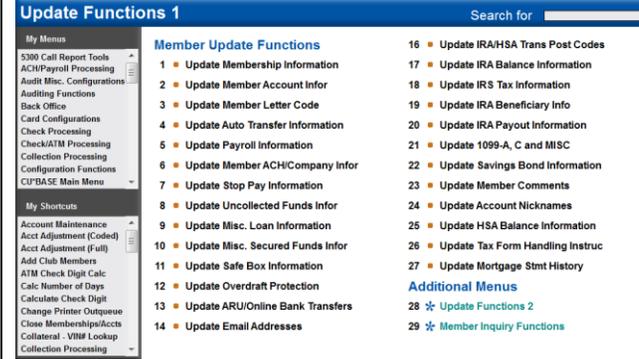
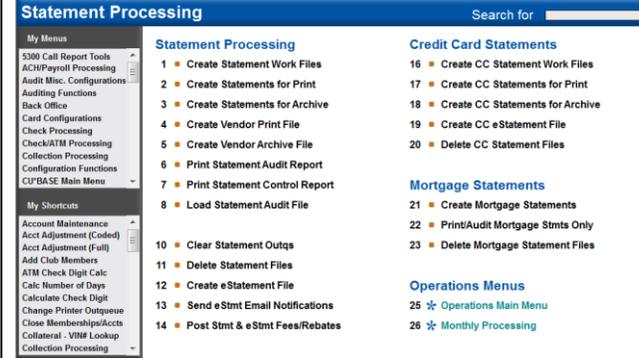
Remember that if a person already had access to the commands on a particular menu, new commands added to that menu will be set up to allow access (checked) for that person automatically.

Menu Changes

Menu Name	Old Menu	New Menu	Comments
MN5300	<p>5300 Call Report Tools Search for _____</p> <p>My Menus</p> <ul style="list-style-type: none"> 5300 Call Report Tools ACH/Payroll Processing Audit Misc. Configurations Auditing Functions Back Office Card Configurations Check Processing Check/ATM Processing Collection Processing Configuration Functions CU*BASE Main Menu <p>My Shortcuts</p> <ul style="list-style-type: none"> Account Maintenance Acct Adjustment (Coded) Acct Adjustment (Full) Add Club Members ATM Check Digit Calc Calc Number of Days Calculate Check Digit Change Printer Outqueue Close Memberships/Accts Collateral - VINI Lookup Collection Processing <p>NCUA 5300 Call Reports</p> <ul style="list-style-type: none"> 1 Enter 5300 Call Report Data 2 5300 Call Report Inquiry <p>5300 Call Report Analysis</p> <ul style="list-style-type: none"> 16 Call Report Ratios Dashboard <p>Reports</p> <ul style="list-style-type: none"> 9 Qtrly Call Report Data Listing 10 Call Report Configuration Rpt <p>Additional Menus</p> <ul style="list-style-type: none"> 29 CU Management Functions 	<p>5300 Call Report Tools Search for _____</p> <p>My Menus</p> <ul style="list-style-type: none"> 5300 Call Report Tools ACH/Payroll Processing Audit Misc. Configurations Auditing Functions Back Office Card Configurations Check Processing Check/ATM Processing Collection Processing Configuration Functions CU*BASE Main Menu <p>My Shortcuts</p> <ul style="list-style-type: none"> Account Maintenance Acct Adjustment (Coded) Acct Adjustment (Full) Add Club Members ATM Check Digit Calc Calc Number of Days Calculate Check Digit Change Printer Outqueue Close Memberships/Accts Collateral - VINI Lookup Collection Processing <p>NCUA 5300 Call Reports</p> <ul style="list-style-type: none"> 1 Enter 5300 Call Report Data 2 5300 Call Report Inquiry 3 Qtrly Call Report Data Listing 4 Call Report Configuration Rpt 5 Call Report Ratios Dashboard <p>15 Membership Analysis</p> <ul style="list-style-type: none"> 16 NCUA Share Insurance Report 17 PLI Trial Balance 18 Print CU Financials 19 Print Investment Maturity Report 20 Print Loan Classification Report 21 Selective Loan Information Rpt 22 Trial Balance Select Information <p>Tools for Gathering 5300 Data</p> <ul style="list-style-type: none"> 9 ARU/Online Banking Stats Dashbrd 10 CD Maturity Analysis 11 Contingent Liability Analysis 12 Loan Purpose Analysis 13 Loan Security Code Analysis 14 Member TB Summary by GL Account <p>Additional Menus</p> <ul style="list-style-type: none"> 29 CU Management Functions 	<ul style="list-style-type: none"> 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	<p>General Configuration 2 Search for _____</p> <p>My Menus</p> <ul style="list-style-type: none"> 5300 Call Report Tools ACH/Payroll Processing Audit Misc. Configurations Auditing Functions Back Office Card Configurations Check Processing Check/ATM Processing Collection Processing Configuration Functions CU*BASE Main Menu <p>My Shortcuts</p> <ul style="list-style-type: none"> Account Maintenance Acct Adjustment (Coded) Acct Adjustment (Full) Add Club Members ATM Check Digit Calc Calc Number of Days Calculate Check Digit Change Printer Outqueue Close Memberships/Accts Collateral - VINI Lookup Collection Processing <p>Marketing Configuration</p> <ul style="list-style-type: none"> 1 Tiered Service Level Config 2 SEG/Sponsor Configuration 3 Cross Selling Task List Config 4 Marketing Club Configuration 5 Member Survey Configuration 6 New/Closed Reason Codes/Comments 7 Configure Misc Mbr Acct Forms 8 Member in Good Standing Config <p>15 Deposit Item Fee Configuration</p> <ul style="list-style-type: none"> 16 Cashed Check Fee Configuration 17 CU Printed Check Fee Config 18 CU Printed Money Order Fee Conf 19 Phone Transfer Fee Configuration 20 Electronic Deposit Hold Config 21 Trans Handling/Analysis Rules 22 Teller Check Holds Configuration 23 Configure CU Non-Business Days 24 Configure Sales Tax on Srvc Fees <p>CU Pricing/Value Configuration</p> <ul style="list-style-type: none"> 11 Fee Income/Waiver Analysis 12 Service Charge Configuration 13 NSF/OD Transfer Configuration 14 Misc Member Fee Totals/Update <p>Additional Menus</p> <ul style="list-style-type: none"> 26 Internet/Email Marketing 27 Internet Member Services Config 28 General Configuration 1 	<p>General Configuration 2 Search for _____</p> <p>My Menus</p> <ul style="list-style-type: none"> 5300 Call Report Tools ACH/Payroll Processing Audit Misc. Configurations Auditing Functions Back Office Card Configurations Check Processing Check/ATM Processing Collection Processing Configuration Functions CU*BASE Main Menu <p>My Shortcuts</p> <ul style="list-style-type: none"> Account Maintenance Acct Adjustment (Coded) Acct Adjustment (Full) Add Club Members ATM Check Digit Calc Calc Number of Days Calculate Check Digit Change Printer Outqueue Close Memberships/Accts Collateral - VINI Lookup Collection Processing <p>Marketing Configuration</p> <ul style="list-style-type: none"> 1 Tiered Service Level Config 2 SEG/Sponsor Configuration 3 Cross Selling Task List Config 4 Marketing Club Configuration 5 Member Survey Configuration 6 New/Closed Reason Codes/Comments 7 Configure Misc Mbr Acct Forms 8 Member in Good Standing Config <p>15 Deposit Item Fee Configuration</p> <ul style="list-style-type: none"> 16 Cashed Check Fee Configuration 17 CU Printed Check Fee Config 18 CU Printed Money Order Fee Conf 19 Phone Transfer Fee Configuration 20 Electronic Deposit Hold Config 21 Trans Handling/Analysis Rules 22 Teller Check Holds Configuration 23 Configure CU Non-Business Days 24 Configure Sales Tax on Srvc Fees <p>CU Pricing/Value Configuration</p> <ul style="list-style-type: none"> 11 Fee Income/Waiver/Refund Analysis 12 Service Charge Configuration 13 NSF/OD Transfer Configuration 14 Misc Member Fee Totals/Update <p>Additional Menus</p> <ul style="list-style-type: none"> 26 Internet/Email Marketing 27 Internet Member Services Config 28 General Configuration 1 	<ul style="list-style-type: none"> Changed #11 Fee Income/Waiver Analysis to jump to the enhanced dashboard on the Active Beta Tests menu (MNMGMT)
MNCNFE	<p>Internet Member Services Config Search for _____</p> <p>My Menus</p> <ul style="list-style-type: none"> 5300 Call Report Tools ACH/Payroll Processing Audit Misc. Configurations Auditing Functions Back Office Card Configurations Check Processing Check/ATM Processing Collection Processing Configuration Functions CU*BASE Main Menu <p>My Shortcuts</p> <ul style="list-style-type: none"> Account Maintenance Acct Adjustment (Coded) Acct Adjustment (Full) Add Club Members ATM Check Digit Calc Calc Number of Days Calculate Check Digit Change Printer Outqueue Close Memberships/Accts Collateral - VINI Lookup Collection Processing <p>Online Banking Configuration</p> <ul style="list-style-type: none"> 1 Online Banking VMS Configuration 3 Self-Service Fee Configuration 4 Online App Loan Officer Config 5 Flood PIB Default Profile Chngs 6 Config PIN/PW Reset Reason Codes 7 Config New User Promo Campaign <p>Bill Payment Configuration</p> <ul style="list-style-type: none"> 17 EasyPay Service Charge Cnfg 18 EasyPay Marketing Message <p>Printed Statement Styles</p> <ul style="list-style-type: none"> 21 Config Styles Available to Mbrs <p>eStatements Configuration</p> <ul style="list-style-type: none"> 9 Configure eStatements / Fees <p>Online Ballot/Survey</p> <ul style="list-style-type: none"> 14 Online Ballot Config/Results Rpt 15 Record Mbr Vote (Online Ballot) <p>Additional Menus</p> <ul style="list-style-type: none"> 26 Share Products Configuration 27 Loan Products Configuration 27 General Configuration 1 28 General Configuration 2 29 Rate Maintenance/Mgmt Functions 30 Internet/Email Communications 	<p>Internet Member Services Config Search for _____</p> <p>My Menus</p> <ul style="list-style-type: none"> 5300 Call Report Tools ACH/Payroll Processing Audit Misc. Configurations Auditing Functions Back Office Card Configurations Check Processing Check/ATM Processing Collection Processing Configuration Functions CU*BASE Main Menu <p>My Shortcuts</p> <ul style="list-style-type: none"> Account Maintenance Acct Adjustment (Coded) Acct Adjustment (Full) Add Club Members ATM Check Digit Calc Calc Number of Days Calculate Check Digit Change Printer Outqueue Close Memberships/Accts Collateral - VINI Lookup Collection Processing <p>Online/Mobile Services Config</p> <ul style="list-style-type: none"> 1 Online/Mobile Banking VMS Config 2 Self-Service Fee Configuration 3 Online App Loan Officer Config 4 Flood PIB Default Profile Chngs 5 Config PIN/PW Reset Reason Codes 6 Config New User Promo Campaign <p>Bill Payment Configuration</p> <ul style="list-style-type: none"> 17 EasyPay Service Charge Cnfg 18 EasyPay Marketing Message <p>Printed Statement Styles</p> <ul style="list-style-type: none"> 21 Config Styles Available to Mbrs <p>Member Communications Configs</p> <ul style="list-style-type: none"> 9 Configure eStatements / Fees 10 Config Monthly eStatement Emails 11 Config CU FROM Email Addresses 14 Online Ballot Config/Results Rpt 15 Record Mbr Vote (Online Ballot) <p>Additional Menus</p> <ul style="list-style-type: none"> 26 Share Products Configuration 27 Loan Products Configuration 27 General Configuration 1 28 General Configuration 2 29 Rate Maintenance/Mgmt Functions 30 Internet/Email Communications 	<ul style="list-style-type: none"> 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		<ul style="list-style-type: none"> 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			<ul style="list-style-type: none"> Changed verbiage on #14 as shown
MNMGMA			<ul style="list-style-type: none"> Changed #5 and #6 to launch the tools instead of jumping to the Active Beta Tests menu

Menu Name	Old Menu	New Menu	Comments
MNMGM	 <p>Management Analysis Dashboards</p> <p>Leadership Dashboards</p> <ol style="list-style-type: none"> 5300 Call Report Ratios Dashbrd Patronage Comparison ARU/Online Banking Stats Dashbrd ATM Network/Terminal Activity Budget Review/Analysis Check Processing Stats Dashboard Collections Dashboard/Summary Contingent Liability Analysis Credit Report Data Mining Credit Score History Dshbrd EFT Portfolio Dashboard Fee Income/Waiver Dashboard Financial Statement Review Loan App Monthly Stats Comparian <p>Loan Concentration Risk by Mbr</p> <p>Ln Portfolio Concentration Risk</p> <p>Loan Queue Activity Tracking</p> <p>Loan Risk Score Analysis</p> <p>Loan/Share Trial Bal. Review</p> <p>Membership Summary Comparison</p> <p>All Accounts Analysis Dashboard</p> <p>All Memberships Analysis Dshbrd</p> <p>NSF Statistics Dashboard</p> <p>Package Loans to be Sold</p> <p>Rate Analysis Across the Network</p> <p>Targeted Tiered Score Analy</p> <p>Tiered Svcs Monthly Comparison</p> <p>Tran Activity Summary Comparison</p> <p>Trans Handling/Analysis Rules</p>	 <p>Management Analysis Dashboards 1</p> <p>Leadership Dashboards</p> <ol style="list-style-type: none"> 5300 Call Report Ratios Dashbrd All Accounts Analysis Dashboard All Memberships Analysis Dashbrd ARU/Online Banking Stats Dashboard ATM Network/Terminal Activity Budget Review/Analysis Check Processing Stats Dashboard Collections Dashboard/Summary Common Bonds for Any Mbr Group Contingent Liability Analysis Credit Report Data Mining Credit Score History Dshbrd Cross Sales Analysis Dashboard EFT Portfolio Dashboard <p>Fee Income/Waiver/Refund Dashbrd</p> <p>Financial Statement Review</p> <p>Ln Portfolio Concentration Risk</p> <p>Ln Write-off/Charge-off History</p> <p>Loan App Monthly Stats Comparian</p> <p>Loan Concentration Risk by Mbr</p> <p>Loan Queue Activity Tracking</p> <p>Loan Risk Score Analysis</p> <p>Loan/Share Trial Bal. Review</p> <p>Membership Summary Comparison</p> <p>NSF Statistics Dashboard</p> <p>Package Loans to be Sold</p> <p>Patronage Comparison</p> <p>More dashboards >>></p>	<ul style="list-style-type: none"> 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	 <p>Management Analysis Dashboards 2</p> <p>More Leadership Dashboards</p> <ol style="list-style-type: none"> Rate Analysis Across the Network Targeted Tiered Score Analy Tiered Svcs Monthly Comparison Tran Activity Summary Comparison Trans Handling/Analysis Rules <p><<< More dashboards</p>	<ul style="list-style-type: none"> New menu for the overflow of dashboards from the Management Analysis Dashboards 1 menu (MNMGM)
MNMGMT	 <p>Management Processing/Active Beta Tests</p> <p>Processing/Forecasting Tools</p> <ol style="list-style-type: none"> CU*BASE Employee Security Member Rate Maintenance Divlnt Base Rate Forecasting Divlnt Split Rate Forecasting Certificate Repricing Forecast Tiered Services Forecast <p>"Active Beta" - Tests in Process</p> <ol style="list-style-type: none"> Patronage Comparison Credit Report Data Mining Credit Score History Dshbrd EFT Portfolio Dashboard Loan Risk Score Analysis Rate Analysis Across the Network Where Your Members Shop Where Your Members Borrow Targeted Tiered Score Analy <p>Active Beta Feedback & Info</p> <ol style="list-style-type: none"> Executive Study Group Feedback Join the Beta Pool What's Cooking in the Kitchen <p>CU Management Functions</p>	 <p>Management Processing/Active Beta Tests</p> <p>Processing/Forecasting Tools</p> <ol style="list-style-type: none"> CU*BASE Employee Security Member Rate Maintenance Divlnt Base Rate Forecasting Divlnt Split Rate Forecasting Certificate Repricing Forecast Tiered Services Forecast <p>"Active Beta" - Tests in Process</p> <ol style="list-style-type: none"> NEW! Common Bonds for Mbr Grp Credit Score History Dshbrd NEW! Cross Sales Analysis Dashbrd NEW! Fee Income/Waivers/Refunds Targeted Tiered Score Analy Patronage Comparison <p>Active Beta Feedback & Info</p> <ol style="list-style-type: none"> Executive Study Group Feedback Join the Beta Pool What's Cooking in the Kitchen <p>Leadership Dashboards</p> <p>CU Management Functions</p>	<ul style="list-style-type: none"> 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			<ul style="list-style-type: none"> Changed #13 (this program now only allows updates to the email notification messages, not the eStatement config as before)
MNUPDT			<ul style="list-style-type: none"> Added new #27 Update Mortgage Stmt History <p>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.</p>
MNOP07 (OPER > #6) <i>(For self processors only)</i>			<ul style="list-style-type: none"> Added new #23 Delete Mortgage Statement Files