

## 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:

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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 <u>allow</u> access (checked) for that person automatically.

## Menu Changes

Menu Name	Old Menu		New Menu	Comments		
MN5300	Status Call Report Tools  Number of the status of the sta	Search for 5300 Call Report Analysis 16 • Call Report Ratios Dashboard Additional Menus 29 * CU Management Functions	5300 Call Report Tools     Search for       State Report Tools     NCUA 5300 Call Report Data     15 • Membership Analysis       Add CHP prof Processing Auditing Functions Back Office     1 • Enter 5300 Call Report Data     16 • NCUA Share Insurance Report       2 • 5300 Call Report Inquiry     3 • GdtY Call Report Data     16 • NCUA Share Insurance Report       3 • GdtY Call Report Configurations Dack/ALI Processing Carl Configurations Check/ALI Processing Configuration Report     1 • Enter 5300 Call Report Data     19 • Print CU Financiais       4 • Call Report Reios Dashboard     0 • Print Loan Classification Report     20 • Print Loan Classification Report       Vb Stotzer     9 • ARUIOnline Banking Stats Dashboard     0 • Print Loan Classification Report       4 · Cub Report Reios     9 • ARUIOnline Banking Stats Dashboard     2 • Trial Balance Select Information       9 · ACI Algumment (Full Act Algumment (Full Calcular Check Digit Classific Configurations Change Printer Congressing Calcular Check Digit Classific Loan Classific Configuration     9 • ARUIOnline Banking Stats Dashbord       10 • CD Maturity Analysis     12 • Loan Purpose Analysis     13 • Loan Security Code Analysis       13 • Loan Security Code Analysis     2 • ½ CU Management Functions       29 * CU Management Functions     29 * CU Management Functions	<ul> <li>Added the "Tools for Gathering 5300 Data" section (all of these reports already exist on other menus)</li> <li>Rearranged other existing items (#9-10, 16) to #3-5 as shown</li> </ul>		
MNCNFD	State         Marketing Configuration           State         State           State         State           Auditing Functions         Auditing Functions           Auditing Functions         Image: Second Sec	Search for 15 • Deposit Item Fee Configuration 16 • Cashed Check Fee Configuration 17 • CU Printed Check Fee Configuration 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 Additional Menus 25 ½ Internet/Email Marketing 27 ½ Internet/Email Marketing 27 ½ Internet/Email Marketing 27 ½ Internet/Lemair Services Config 28 ∯ General Configuration 1	Search for         Search for           Vision         Marketing Configuration         15         Deposit Item Fee Configuration           Station Foreigner         1         Tered Service Level Config         16         Cashed Check Fee Configuration           Auditing Functions Card Configuration Check/AIM Processing Collection Processing Collection Processing Configured for the Survey Configuration         15         Deposit Item Fee Configuration           A Marking Functions Check/AIM Processing Collection Processing Collection Processing Configured for Survey Configuration         19         Phone Transfer Fee Configuration           Account Minimance Acct dipatments (Code Minimance Cack Ison Brok Call Cack Is	<ul> <li>Changed #11 Fee Income/Waiver Analysis to jump to the enhanced dashboard on the Active Beta Tests menu (MNMGMT)</li> </ul>		
MNCNFE	Internet Member Services Config           Vs Menue           State Repert Reek Actifier your Configuration Auditing Functions Back Office Card Configurations Check/AIT Wrossening Collection Processing Configuration Revenue (Check/AIT Wrossening Configuration Revenue Configuration Revenue (Check/AIT Wrossening Configuration Revenue (Check/AIT	Search for Bill Payment Configuration 17 • EavyPay Service Charge Cnfg 18 • EavyPay Marketing Message Printed Statement Styles 21 • Config Styles Available to Mbrs Additional Menus 25 ½ Share Products Configuration 26 ½ Loan Products Configuration 27 ½ General Configuration 1 28 ½ General Configuration 1 29 ½ Rate Maintenance/Mgmt Functions 30 ½ Internet/Email Communications	Internet Member Services Config         Search for           VMmus         Solid Repet Tool, Actify prof Porcessing Actify prof Porcessing Card Configuration Back Office Card Configuration Check/AIT Processing Configuration Revealed Configuration Check/AIT Processing Configuration Revealed Configuration Check/AIT Processing Configuration Revealed Configuration Revealed Config Cub Revealed Config Cub Revealed Config Cub Revealed Configuration Revealed Config	<ul> <li>Added new #10 Config Monthly eStatement Emails</li> <li>Added new #11 Config CU FROM Email Addresses</li> <li>Changed verbiage only on #1</li> </ul>		

Menu Name	Old Menu	New Menu	Comments			
MNCNFF	NEW	Collections Configuration       Search for         Notest       Solution         Solution       - Loan Classification Code Config         Autinity Functions       - Loan Classification Code Config         Autinity Functions       - Loan Fines Configuration         Card Configurations       - Loan Fines Configuration         Check/Processing       - Loan Fines Configuration         Concent Maintenance       - Collection Parameter Config         Concent Maintenance       -         Act Adjustment (Code)       -         Add Lub Members       -         Alt Check Digit Calls       -         Card Maintener (Full)       -         Add Chab Members       -         Alt Check Digit Calls       -         Context Maintener (Full)       -         Context Maintener (Full)       -         Context Multicons       -         Callection Processing       -         Callection Processing       -	<ul> <li>This new menu contains items that were formally on the Loan Products config menu MNCNFB</li> <li>Added new #5 Write- off/Charge-off Code Config</li> </ul>			
MNCOLL	Standard       Standard         Standard       Daily Collection Processing       19       Print Functions         Auditing Functions       0       Voltanding Follow-ups       19       Print Collection Delinquency         Auditing Functions       0       Classified Loan Review       19       Print Collection Delinquency         Card Configurations       0       Classified Loan Review       19       Print Collection Delinquency         Check/AIR Meme       7       Collection Processing       20       Print Miscellaneous Checks         Collection Processing       7       Collection Processing       19       Print Collection Delinquency         Conduction Processing       7       Loan Classification Update       20       Print Misc Member Account Forms         Account Ministenance       0       Nember Skip-Pay Program Config Inquiry       Additional Member Account Forms         Act Adjustment (Coder       0       Skip-Pay Program Config Inquiry       Additional Menus         Alt Check Differ Coder       0       Collections Processing       21       4         Calculate Check Namber Gorge       13       Charge Off Savings/Checking       24       4         Calculate Check Namber Gorge       15       AcctAdjustment Trans Override       24       4 <th>Dily Collection Processing       Dearch for         Notext       Dily Collection Processing       1 - Vork Collections         Auditing Processing       - Vork Collections       16 - Print Miscellaneous Checks         Auditing Processing       - Collections Dashboard       19 - Print Collection Beinguency         Check Processing       - Collections Dashboard       19 - Print Collection Beinguency         Orthow Foreigner       - Collections Dashboard       20 - Print Miscellaneous Checks         Notext       - Collections Dashboard       19 - Print Collection Beinguency         Nations Foreigner       - Collections Dashboard       20 - Print Miscellaneous Checks         Nations Foreigner       - Collections Dashboard       20 - Print Miscellaneous Checks         Nations Foreigner       - Collection Processing       20 - Print Miscellaneous Checks         Nations Collections Processing       - Collections Processing       20 - Print Miscellaneous Checks         Nations Collections Processing       - Skip-Pay Program Config Inquiry       22 - Print Nethod B Delinquency Rpt         Act Adjustment (Field)       - Skip-Pay Program Config Inquiry       Additional Menus         Scatuate Kon Wild Collections Processing       - Additional Menus       24 * Member Inquiry Functions         13 - Charge Off Saving Checking       - Skip-Pay Corgram Config Inquiry       24 * Member</th> <th><ul> <li>Changed verbiage on #14 as shown</li> </ul></th>	Dily Collection Processing       Dearch for         Notext       Dily Collection Processing       1 - Vork Collections         Auditing Processing       - Vork Collections       16 - Print Miscellaneous Checks         Auditing Processing       - Collections Dashboard       19 - Print Collection Beinguency         Check Processing       - Collections Dashboard       19 - Print Collection Beinguency         Orthow Foreigner       - Collections Dashboard       20 - Print Miscellaneous Checks         Notext       - Collections Dashboard       19 - Print Collection Beinguency         Nations Foreigner       - Collections Dashboard       20 - Print Miscellaneous Checks         Nations Foreigner       - Collections Dashboard       20 - Print Miscellaneous Checks         Nations Foreigner       - Collection Processing       20 - Print Miscellaneous Checks         Nations Collections Processing       - Collections Processing       20 - Print Miscellaneous Checks         Nations Collections Processing       - Skip-Pay Program Config Inquiry       22 - Print Nethod B Delinquency Rpt         Act Adjustment (Field)       - Skip-Pay Program Config Inquiry       Additional Menus         Scatuate Kon Wild Collections Processing       - Additional Menus       24 * Member Inquiry Functions         13 - Charge Off Saving Checking       - Skip-Pay Corgram Config Inquiry       24 * Member	<ul> <li>Changed verbiage on #14 as shown</li> </ul>			
MNMGMA	Image: State of the second s	Wream         Search for           SM0 Call Report Tools And this configuration Configuration Check Processing Configuration Check Processing Configuration Check Processing Configuration Check Processing Configuration Check Processing Configuration Check Processing Configuration	<ul> <li>Changed #5 and #6 to launch the tools instead of jumping to the Active Beta Tests menu</li> </ul>			

Menu Name	Old Menu	New Menu	Comments
MNMGMD	Management Analysis Dashboards         Search for           Store	Imanagement Analysis Dashboards 1         Image in Rink       Image in Rink         King       Actification in Rink         Autil Mine: Configurations       1         Autil Mine: Configurations       1         Autil Mine: Configurations       1         Autil Mine: Configurations       1         Check Processing       2         Add the Member Processing       2         Mathematic Fund Analysis       2         Add Che Member Processing       2         Add Che Member Processing       2         Add Che Member Processing       2         Add Che Mem	<ul> <li>Reorganized all commands to really alphabetize</li> <li>Changed several items to launch the tools instead of jumping to the Active Beta Tests menu</li> <li>Added new Active Beta items</li> <li>Created a second Dashboards several items</li> </ul>
MNMGME	NEW	Management Analysis Dashboards 2         Vy Num         Sty Mark         Mark Sty Sty Mark         Cale Configuration Functions         My Shoricute         Act Alguatement (Codel)         Act Alguatement (Codel)         Act Alguatement (Codel)         Act Alguatement (Codel)         Cale Knewherd Days         Cale Knewherd Days         Cale Knewherd Days         Cale Knewherd Days         Cale Knewherd Processing         Cale Knewherd Days	<ul> <li>New menu for the overflow of dashboards from the Management Analysis Dashboards 1 menu (MNMGMD)</li> </ul>
MNMGMT	Management Processing/Active Beta Tests         Search for           Stylematic         Processing/Forecasting Tools         "Active Beta" - Tests in           Stylematic              • CU'BASE Employee Security               • Active Beta" - Tests in            Stylematic              • Cu'BASE Employee Security               • Cedit Report Tools               • Cu'BASE Employee Security            Addriding: Configuration             Check/AH Missioner             Check/AH Missioner             Check/AH Missioner             Califyeration             Check/AH Missioner             Active Beta Forecasting             • Divint Base Rate Forecasting             • Certificate Repricing Forecast             • Tered Services Forecast             • Tered Services Forecast             • Tered Services Forecast             • Targeted Tiered Score Alaguat             Calculate Code             vitif Lookup             Calculate Code             prime Code             vitif Lookup             Calculate Code             vitif Lookup             Calculate Code             vitif Lookup             Calculate Code             vitif Lookup             Code Missioner             Code Missioner             Code Missioner             Calculate Code             vitif Lookup             Code Missioner             Code Missioner	Management Processing/Active Beta Tests         Process       Processing/Sorecasting Tools       "Active B         g       300 call Report Tools Actifier processing bird       1 - CU'BASE Employee Security       16 - NEW 1 - CU'BASE Employee Security       16 - NEW 1 - CU'BASE Employee Security         a       Divint Base Rate Forecasting       18 - NEW 2 - Member Rate Maintenance       17 - Credit 3 - Divint Base Rate Forecasting       18 - NEW 2 - Member Rate Maintenance         a       Divint Base Rate Forecasting       18 - NEW 2 - Certificate Repricing Forecast       20 - Targe 2 - Cartificate Repricing Forecast       20 - Targe 2 - Targe         op       W Soloctus       - Cortificate Repricing Forecast       21 - Patron         Acc Adjustment (Code) Acc Adjustment (Code) Calculate Cleb Digit Change Printer Ourgewore Collection Processing       29 - X Leade         ns       Collection Processing Collection Processing       29 - X Leade         ns       Collection Processing       29 - X Leade	<ul> <li>Returned several of the Active Beta Tests items to their original locations on MNMGMD and MNMGMD and MNMGMA</li> <li>Added new #16 Analyze Common Bonds for Mbr Grp</li> <li>Added new #18 Cross Sales Analysis Dashboards</li> <li>Added new #18 Cross Sales Analysis Dashboard</li> <li>Added new #19 Fee Income/Waivers/ Refunds</li> </ul>

Menu Name	Old Menu		New Menu	Comments
MNPRTC	Member Communication           Vy Numu           S20 Call Report Tools, Auditing Functions Back Office         1 = Print Laser Member Notices           Auditing Functions Back Office         2 = Print Contract Var Rate Notices           Card Configurations Check/XII Processing Collection Processing Configurations Check/XII Processing Configurations Corr Data Materia         1 = Print Laser Member Account Forms           Check/XII Processing Configurations Corr Data Materia         1 = Print Loan Coupons           Configurations Corr Data Materia         1 = Oring Labores Labels)           Configurations Corr Data Materia         1 = Oring Labores Labels)           Configurations Corr Data Materia         1 = Update Statement Notices           Add Club Member Ath Check Digit Calc Calc Number Oring Colleater Unit Loang Colleater Company Colleater Company	Daily Report Control         19       OUTO Report Control         17       Change Printer OUTO Assignment         18       CU*SPY Daily Reports         Auto/Mail Check Processing       1         21       Print Auto/Mail Check Audit List         22       Print Auto/Mail Check Audit List         23       Remoter Connect-Online Bank Mags         26       Member Connect-Chilling Mags         28       Marketing Communications         28       "Member Connect" Marketing Tools	Member Communication         Search for           VMemu         State for           State Repert Took Act/Pryority Processing Auditing Functions Date Average Statement Main Configurations Check/AII Processing Collection Processing Collection Processing Configurations (Full Act Algumment Full Act Configurations Configurations (Full Act Algumment Full Act Algumment Full Act Algumment Full Act Algumment Full Act Algumment Full Act Configurations Collection Processing Collection Processing Collectio	<ul> <li>Changed #13 (this program now only allows updates to the email notification messages, not the eStatement config as before)</li> </ul>
MNUPDT	Update Functions 1           Notes         Member Update Functions           State Report Took, Auditing Functions Back Office         1         Update Member Account Infor 3         2         Update Member Account Infor 4         2         Update Member Active Company Infor 4         2         Update Member Active Company Infor 4         2         Update Member Active Company Infor 4         2         Update Misc. Loan Information 4         2         Update Misc. Loan Information 4         2         Update Misc. Secured Funds Infor 4         2         Update Set Box Information 4         2         Update Set Box Information 4         2         Update ARWOrdinie Bank Transfers 4         2         Update Set Email Addresses	Search for 16 • Update IRAHSA Trans Post Codes 17 • Update IRA Balance Information 18 • Update IRA Beneficiary Info 20 • Update IRA Beneficiary Info 20 • Update IRA Beneficiary Info 20 • Update IRA Beneficiary Info 21 • Update IRA Peryout Information 22 • Update IRA Beneficiary Info 23 • Update IRA Beneficiary Info 24 • Update IRA Beneficiary Info 25 • Update IRA Beneficiary Info 26 • Update IRA Beneficiary Info 27 • Update IRA Beneficiary Info 28 • Update IRA Beneficiary Info 29 • Update Info 29 • Update Functions 2	Update Functions 1         Search for           Swear         Swear <th><ul> <li>Added new #27 Update Mortgage Stmt History</li> <li>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.</li> </ul></th>	<ul> <li>Added new #27 Update Mortgage Stmt History</li> <li>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.</li> </ul>
MNOP07 (OPER > #6) (For self processors only)	Statement Processing           Styde Call Report Tool Actifyrenol Processing         Statement Processing           1         Create Statements for Print           Andf Mic. Comparison         2         Create Statements for Archive           And Mic. Concessing         2         Create Statements for Archive           CheckXIT Processing         2         Create Statement Audit Report           Configuration introduces         2         Create Vendor Print File           Configuration introduces         2         Create Vendor Print File           Configuration introduces         2         Create Vendor Print File           Configuration introduces         2         Print Statement Audit Report           CUPBASE Main Memu         2         Create Vendor Archive File           Configuration introduces         2         Oreate Statement Audit Report           Acct Adjustmeet (Full)         2         Create Statement File           Acct Adjustmeet (Full)         2         Create e-Statement File           Calcular Check Bigli         2         Statement File           Calcular Stock Bigli         2         Statement File           Calcular Check Bigli         3         Send e-Statement File           Calcular Stock Bigli         Poat Statement Audit Reparts         4	Search for Create CC Statements Work Files Create CC Statements for Print Create CC Statements for Archive Create CC Statement File Create CC Statement File Deteite CC Statement Files Deteite	Statement Processing         Search for           Statement Processing         Credit Card Statements           Statement Processing         1 = Create Statement Work Files           Auft Mic. Configuration         2 = Create Statements for Print           Auft Mic. Configuration         3 = Create Statements for Print           Check/XIP Nocessing         2 = Create Statement Audit Report           Check/XIP Nocessing         5 = Create Vendor Print File           Configuration inclustor         5 = Create Vendor Print File           Configuration inclustor         6 = Print Statement Audit Report           Check/XIP Nocessing         7 = Print Statement Audit Report           Check/XIP Notessing         7 = Print Statement Audit Report           Account Minimance field         1 = Delete Statement Files           Chib Members         2 = Create Statement Files           Att Chib Members         1 = Delete Statement Files           Chib Members         2 = Create Statement Files           Chib Members         2 = Create Statement Files           Chib Members         2 = Oreate Statement Files           Chib Member <td< th=""><th><ul> <li>Added new #23 Delete Mortgage Statement Files</li> </ul></th></td<>	<ul> <li>Added new #23 Delete Mortgage Statement Files</li> </ul>