



Documentation: Tricks of the Trade

September Top Picks—Tricks of the Trade Gems

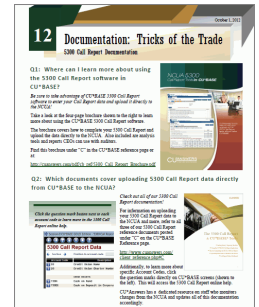
Issue #22

Be sure to attend our upcoming Tricks of the Trade webinar on September 17th from 3:30-4:00 PM ET. Watch for an invitation via email. During the training, we will review the Tricks of the Trade Webpage and some newsletters posted prior to 2012 that we think you should check out!

Pick #1: [Tricks of the Trade #12: 5300 Call Report documentation](#)

Working on your 5300 Call Report? Check out our twelfth issue! This Tricks of the Trade newsletter features documentation tools that help you use the CU*BASE 5300 Call Report software. Be sure to check out the link to the GOLD help topic on Page 2 that provides a checklist of CU*BASE reports you can use to gather data for your 5300 Call Report.

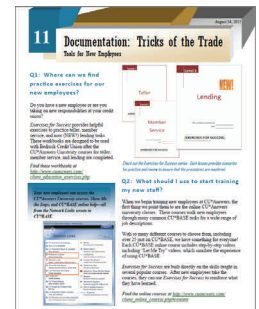
[Check out this issue of Tricks of the Trade.](#)



Pick #2: [Tricks of the Trade #11: Tools for new employees](#)

Thinking about hiring new employees this fall or next year? Check out the eleventh issue of Tricks of the Trade for tools to train them on CU*BASE. Included are links to the *Exercises for Success* series that CU*Answers uses to train its new staff. Also included is a tip for having instructions published to our Show Me the Steps site so that you can simply refer new staff to the site instead of having to explain the steps each time you have as new staff member. Also this benefits the entire network!

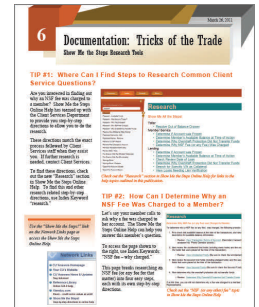
[Check out this issue of Tricks of the Trade.](#)



Pick #3: [Tricks of the Trade #6: Show Me the Steps research tools](#)

Determining why an NSF fee has been charged to a member is a process that involves several steps. We partnered with the Client Services department on this particular issue to provide you with tips on how to research this and other commonly performed CU*BASE tasks. Check out the Show Me the Step topic that was the result of this collaboration.

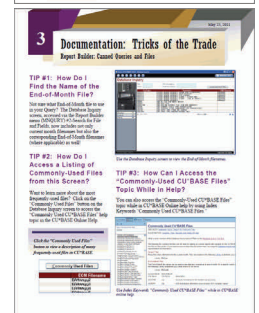
[Check out this issue of Tricks of the Trade.](#)



Pick #4: [Tricks of the Trade #3: Report Builder: Canned Queries and files](#)

Our third Tricks of the Trade newsletter covers using Report Builder. There is a wealth of information in CU*BASE online help about commonly used files, as well as tips on using canned Queries. This Tricks of the Trade newsletter covers how to quickly access this information.

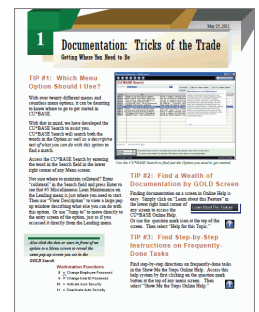
[Check out this issue of Tricks of the Trade.](#)



Pick #5: [Tricks of the Trade #1: Getting where you need to be](#)

The first Tricks of the Trade takes you back to the beginning days of series. Included in this issue are tips from our Writing Team on how to use CU*BASE online help. Have a screenshot and want to find the help for it? Have a report and want to access the screen that generates it? Check out this issue for helpful tips on how to do this and more.

[Check out this issue of Tricks of the Trade.](#)



Refer to the [Tricks of the Trade Newsletter Series page](#) for all issues: