

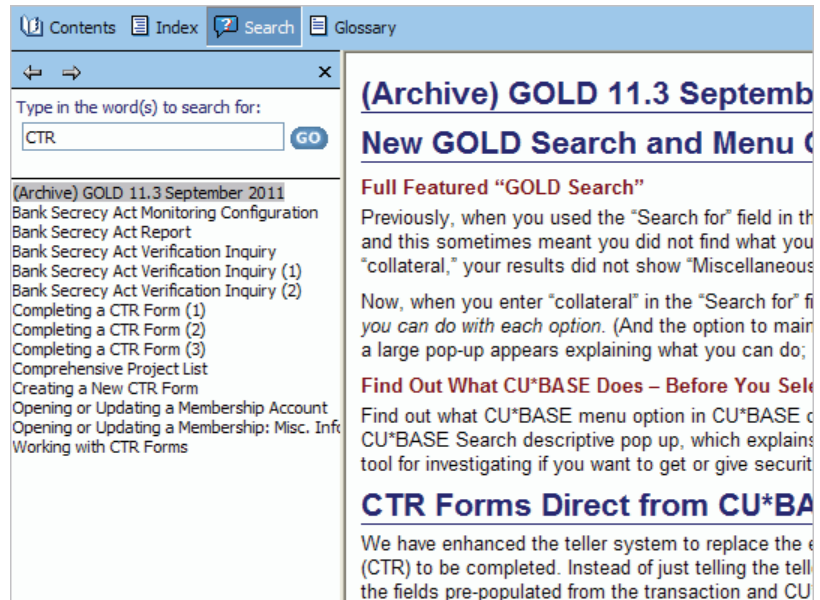
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Documentation: Tricks of the Trade

Release Documentation

TIP #1: I am interested in the details of an old release. Where can I go to quickly find information?

All of the Release Summaries are archived in the CU*BASE Online Help. You can identify these topics since they are all named “(Archive) GOLD.” Search for specific topics, such as “CTR” (shown to the right), or find them all with Index Keyword, “Archive.” From these topics you can jump to the reference materials and other screens’ topics to learn more.



Use the GOLD Online Help Search feature to search for information on projects from previous releases.

TIP #2: What is the point of each of the three release documents? Where are they posted online?

In addition to the **Training Announcement**, you receive three documents about two or three weeks ahead of the release. Each has a different reason for publication.

The **CU*BASE Release Summary** covers all of the content of the release. Check out the first page for a handy Table of Contents. This is available online on the Release Summaries page, shown on the back page of this document.

The **Menu Changes** document is helpful to your security officers when they are planning for the menu changes with each release. Included are directions on running a report to capture your current settings prior to the release. The **File Changes** document outlines the major file changes with the release to assist you with, among other things, keeping your Queries up to date. Both are posted on the News Page (the entry “I am a Client” page).

CU*BASE 11.5 Software Upgrade

Online CU*	CU*NorthWest/CU*South	Self-Processing CU*
December 4, 2011	December 11, 2011	December 12-13, 2011

Contents

- Adverse Action Form Updates...
- New Credit Score Action Code and Credit Score History...
- Instant Card Issue Enhancements...
- EasyPay for iPay (New A)...
- End-of-Month File Name...
- Send Reports Directly to...
- Learn From a Peer? CTR...
- Coming Soon! Money De...
- Miscellaneous...

CU*BASE 11.5 Menu Changes

Attention: CU*BASE Employee Security Officers

Online CU*	CU*NorthWest/CU*South	Self-Processing CU*
Dec. 4, 2011	Dec. 11, 2011	Dec. 12-13, 2011

To Do BEFORE the Release

During the week prior to the release, print a report showing your current employee menu security settings. This will ensure that you have the correct menu security settings to be applied once the release goes live.

- From the MAIN/UD menu, choose "Employee Security Audit/Report"
- Choose 2=Menu Security Audit/Report and click on the "Go" button. You will need to read the report.
- Press Enter; then on the next screen enter a menu name. Use the list of menus on the following pages as a guide.
- If only one option on that menu will be changing, enter the option to change. Use the menu option field to enter the report will include all options on that menu, as follows:

CU*BASE 11.5 File Changes

Release Date: **Online: December 4, 2011**
CU*NorthWest/CU*South: December 11
Self-Processor: December 12 or 13, 2011

The following file changes will be implemented with the 11.5 release. We provide for our credit unions to make any necessary changes to their custom Queries, and to our self-processing credit unions who need to monitor the changes for custom programming or other reasons such as high-visibility file replication.

Running Your Custom Queries

If a file in this listing is included in any of your credit union defined Queries, you will need to retest the Query.

- In INQUIRY #1, select "Change" and your Query.
- From the Report Builder - Main Menu, select "Change Filter"
- To retest the file, simply enter through the screen until you're back to the Report Builder - Main Menu.
- Select "Save" and "Run Interactively"

NOTE: If the file changes from a numeric to an alpha-numeric field, you will need to add single quotes around the Selection Criteria.

New Files Being Added to CU*BASE

Name	Description
USRRP_FLO	User Profile Changes List
USRRP	User Profile View File
WORKSTAT	WFO-CC Rates Report - monthly
WORKSTAT	WFO-CC Rates Report - weekly

Files Being Changed in CU*BASE

Name	Description
CBRA	Credit Bureau & regulatory agencies
CBARS	Credit Bureau for agencies
CVG012	Non-Consumer Mortgage File
NCUNAS	Check application for names - Nonmembers
NSACT	NCCA 800 Call Report Configuration
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TIP #3: What do the three different icons in the Release Summary mean?

Each item in the Release Summary is preceded by an icon, indicating whether the project is implemented immediately, needs to be activated, or requires help from our experts. The key is on the first page of the Release Summary.

Off Trial Balance (OTB) Enhancements

Have another financial institution handling your account release opens new options for credit unions using OT

Members Can Now View OTB Information On

Now credit unions can select to have members view t banking. Members will view the accounts on their Su account in an Account Details page. Credit unions ca

TIP #4: I can't send all my staff to release training, but I want everyone trained. What's an inexpensive way to do this?

Send your credit union Training Coordinator and other key people to our release training, which we offer with every major release (and some minor ones). After we lead our initial release training, we post the PowerPoint we use to train it. It even has mouse pointer icons to help you navigate through the presentation like a pro! Look for the PowerPoint on the **Release Summaries** page ("I am a Client" > Docs & Information > Release Summaries).

Release Summaries 2011

- **CU*BASE Release 11.5**
 - December 5, 2011 - 7 pages
 - CU*BASE Release 11.4 and 11.5 Release Training (PowerPoint Presentation)
 - CU*BASE Release 11.4 and 11.5 Training (NOTE: This is a large file and make take some time to download.)
- **CU*BASE Release 11.4**
 - November 20, 2011 - 4 pages
- **CU*BASE Release 11.3**
 - September 18, 2011 - 15 pages
 - CU*BASE Release 11.3 Training (PowerPoint Presentation)
 - CU*BASE Release 11.3 Training (NOTE: This is a large file and make take some time to download.)

The screenshot shows the CU*ANSWERS website interface. The top navigation bar includes "HOME", "DOCUMENTATION", and "REFERENCE MATERIALS". A search bar is present. The main content area is titled "It's Me 247" Reference Resources Page" and lists "Help Systems" and "Main Introductory Brochure". Below this, there's a section for "CU*BASE Reference Materials" with a search bar and filters. A "What's New" section highlights a "Quick Summary of Changes with the Latest CU*BASE GOLD Upgrade" from December 4, 2011. Other sections include "Adverse Action Form Updates" and "Credit Score Information Appears Directly on Printed Form". A "Deposit Calculator" is visible in the bottom right corner.

TIPS #5-999: What are other ways can I keep up to date on the release?

For more information on the releases, check out all our documentation resources, including:

- CU*BASE Online Help "What's New" topic (a repeat of the Release Summary)
- CU*BASE Reference Page
- It's Me 247 Reference Page
- "Learn about this Feature" link in CU*BASE.

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