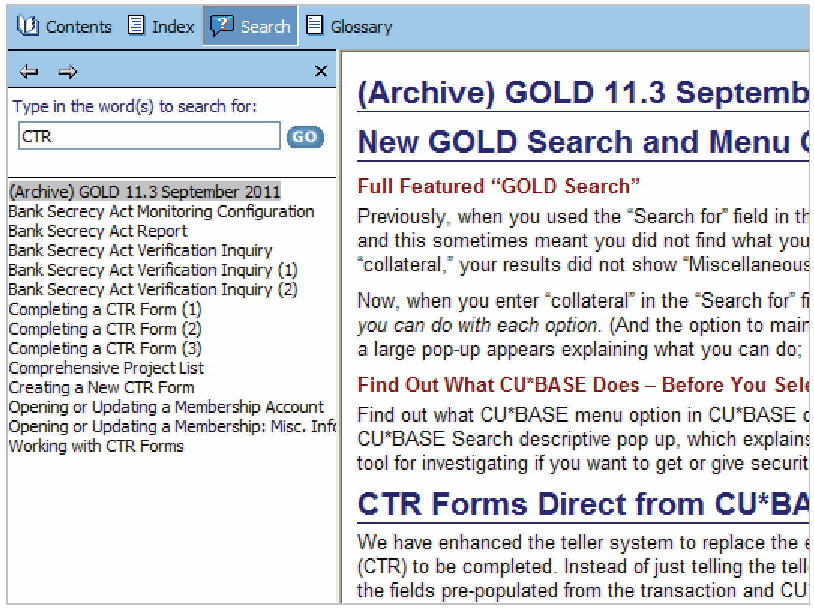
5

Documentation: Tricks of the Trade

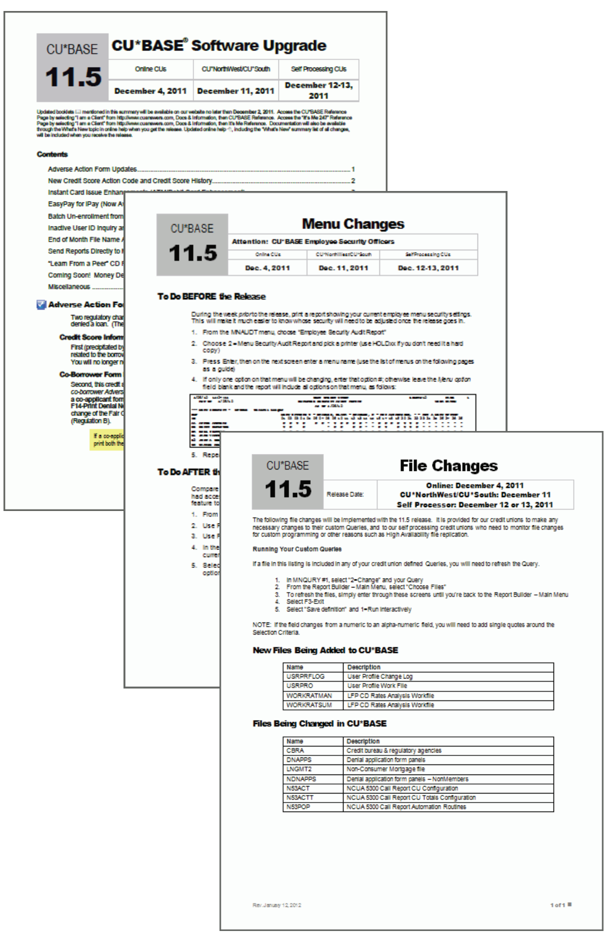
Release Documentation

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?

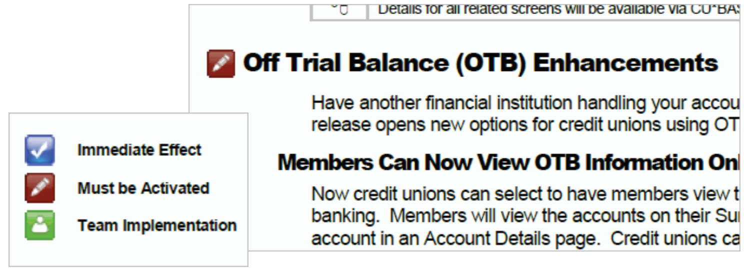
In addition to the **Training Announcement**, you receive three documents about two or three weeks ahead of the release. Each has a different reason for publication.

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).

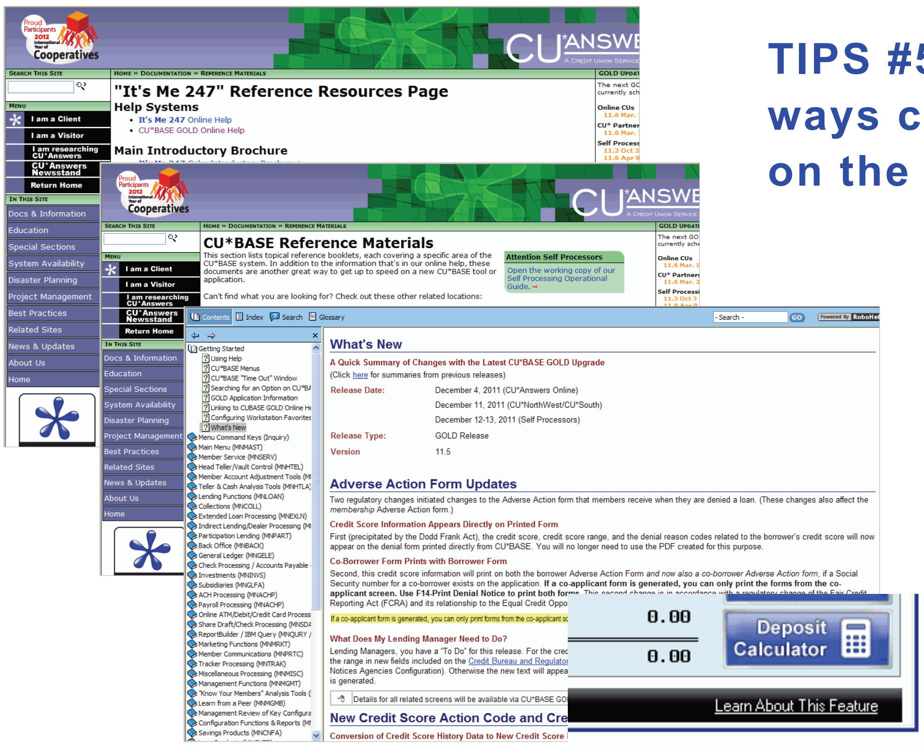
TIP #3: What do the three different icons in the Release Summary mean?

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.



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).



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.

CU*ANSWERS
A Credit Union Service Organization
6000 28th Street, SE
Grand Rapids, Michigan 49546
http://www.cuanswers.com 616-285-5711