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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.

CU*BASE 11.5 Software Upgrade

Online CUIS CU/NorthWest CU/Smith Self Processing CUIS

December 4, 2011 December 11, 2011 December 12-13, 2011

Updated bulletins will be maintained in the summary will be available on our website for one year from December 2, 2011. Access the CU*BASE Reference Page by clicking on the "CU*BASE Reference Page" link in the "CU*BASE Home Page" menu. To access the CU*BASE Reference Page, log in to CU*BASE using a Client from www.northwestcu.com/cu. Once in Information, then On My Business. Documentation will be available on the CU*BASE Reference Page. Click on the "CU*BASE Reference Page" link in the "CU*BASE Home Page" menu. Documentation will be included when you receive the releases.

Adverse Action Form Updates:

- New Credit Score Action Code and Credit Score History
- Instant Card Issue Errors
- EasyPay for Pay Now A
- Start Direct Deposit
- Inactive User ID Inquiry A
- End of Month File Name A
- Send Reports Directly to
- "Learn from a Peer" CD F
- Coming Soon! Money Order
- Mobilecheck

Credit Score Infomation:

- Two regulatory chart
- CU*BASE Credit Score Infomation
- First prequalified to receive credit score
- You will no longer be
- Co-Borrower Form
- Setting up a co-borrower Advert
- A new feature in the P44 Print Detail M
- change of the P44 Print Detail M
- change of the P44 Print Detail M
- If it's possible print both the

To Do BEFORE the Release:

During the week leading to the release, print a report capturing current options for your institution. This will make it much easier to know what security will need to be acquired once the release goes in.

- From the MAINMENU menu, choose Employee Security Audit Report
- Choose 2 -Menu Security Audit Report and print a printer (use HOLBox if you don't need to hard copy)
- Paste this into the CU*BASE menu
- If any option on that menu will be changing, enter the option; otherwise, leave the New option field blank and the report will include all options on the menu, as follows

To Do AFTER the Release:

Compare the new feature to:

- From
- User
- User R
- In the current
- Enter option

File Changes:

Release Date: December 4, 2011
CU/NorthWest CU/Smith December 11, 2011
Self Processor December 12-13, 2011

The following file changes will be implemented with the 11.5 release. It is provided for our credit unions to make any necessary changes to their custom Queries, and for our self processing credit unions who need to monitor the changes made to their CU*BASE system. If you have any questions, please contact your CU*BASE representative.

Running Your Custom Queries:

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

- MAINMENU, select "File Changes" and run Query
- From the Report Builder - Main Menu, select "Choose File"
- Type in the name, identify through the tree screen until you're back to the Report Builder - Main Menu
- Select P5-Exit
- Select Save Session and "Logout" (not Logout)

Note: Please note changes from a numeric to an alpha-numeric field, you will need to add single quotes around the Selection Criteria.

New File Being Added to CU*BASE:

Name	Description
USRPRFLLOG	User Profile Change Log
USRPRFLW	User Profile Work File
WORKRPTM	LPC CO Rate Analysis Workfile
WORKRPTSL	LPC CO Rate Analysis Workfile

Files Being Changed in CU*BASE:

Name	Description
CUIS	CUIS Configuration Repository
DNWRPS	Data application for jsp pages
LIGHT2	Non-Consumer Mortgage file
NONCONM	CUIS Configuration Repository
NSACT	NCLCA SSO CU Report CU Configuration
NSACTT	NCLCA SSO CU Report CU Totals Configuration
NSFOR	NCLCA SSO CU Report Authorization Modules

Contents Index Search Glossary

Type in the word(s) to search for:
CTR **GO**

(Archive) GOLD 11.3 September 2011

Bank Secrecy Act Monitoring Configuration
Bank Secrecy Act Report
Bank Secrecy Act Verification Inquiry
Bank Secrecy Act Verification Inquiry (1)
Bank Secrecy Act Verification Inquiry (2)
Completing a CTR Form (1)
Completing a CTR Form (2)
Completing a CTR Form (3)
Comprehensive Project List
Creating a New CTR Form
Opening or Updating a Membership Account
Opening or Updating a Membership: Misc. Info
Working with CTR Forms

(Archive) GOLD 11.3 September 2011

New GOLD Search and Menu Options

Full Featured "GOLD Search"

Previously, when you used the "Search for" field in the CU*BASE Online Help, and this sometimes meant you did not find what you were looking for. "Collateral," your results did not show "Miscellaneous" topics.

Now, when you enter "collateral" in the "Search for" field, you can do with each option. (And the option to maintain a large pop-up appears explaining what you can do.)

Find Out What CU*BASE Does – Before You Select

Find out what CU*BASE menu option in CU*BASE does with the CU*BASE Search descriptive pop up, which explains the tool for investigating if you want to get or give security information.

CTR Forms Direct from CU*BASE

We have enhanced the teller system to replace the CTR (Customer Transaction Request) to be completed. Instead of just telling the teller to complete the CTR, the fields are pre-populated from the transaction and CU*BASE will automatically complete the CTR.

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.

Off Trial Balance (OTB) Enhancements

- Immediate Effect
- Must be Activated
- Team Implementation

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

Members Can Now View OTB Information Online

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

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).

"It's Me 247" Reference Resources Page

CU*BASE Reference Materials

This section lists topical reference brochures, each covering a specific area of the CU*BASE system. In addition to the information that's in our online help, these documents are another great way to get up to speed on a new CU*BASE tool or application.

Attention Self Processors

Open the working copy of our Self Processing Operational Guide.

What's New

A Quick Summary of Changes with the Latest CU*BASE GOLD Upgrade
(Click [here](#) for summaries from previous releases)

Release Date: December 4, 2011 (CU*Answers Online)
December 11, 2011 (CU*NorthWest/CU*South)
December 12-13, 2011 (Self Processors)

Release Type: GOLD Release

Version: 11.5

Adverse Action Form Updates

Two regulatory changes initiated changes to the Adverse Action form that members receive when they are denied a loan. (These changes also affect the membership Adverse Action form.)

Credit Score Information Appears Directly on Printed Form

First (preceded by the Dodd Frank Act), the credit score, credit score range, and the denial reason codes related to the borrower's credit score will now appear on the denial form printed directly from CU*BASE. You will no longer need to use the PDF created for this purpose.

Co-Borrower Form Prints with Borrower Form

Second, this credit score information will print on both the Borrower Adverse Action Form and now also a co-borrower Adverse Action form, if a Social Security number is provided for the co-applicant. If a co-applicant form is generated, you can only print the forms from the co-applicant's perspective. This is to prevent the co-applicant from receiving a copy of the co-applicant's credit score.

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What Does My Lending Manager Need to Do?

Lending Managers, you have a "To Do" for this release. For the credit score ranges in new fields included on the Credit Bureau and Regulatory Notices Agencies Configuration. Otherwise the new text will appear is generated.

Deposit Calculator

New Credit Score Action Code and Credit Score History Data

Conversion of Credit Score History Data to New Credit Score

Release Summaries 2011

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

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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