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Documentation: Tricks of the Trade CEO Edition

TIP #1: What Monthly Communication Provides Tips on Documentation Resources?

Are you sharing the monthly “Documentation Tips and Tricks” email with your employees?

CU*Answers provides a wealth of education and documentation tools. This quick read will keep you and your staff informed about some of the key resources available. This will help you to encourage a culture of continued learning at your credit union.

Find all nine editions posted under “D” on the CU*BASE Reference page.

http://www.cuanswers.com/client_reference.php#D

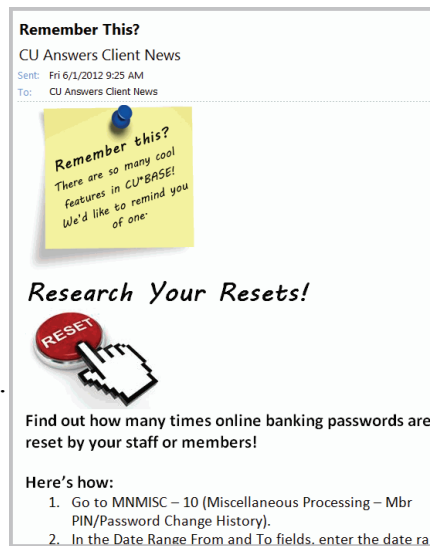
*Are you sharing the monthly Documentation Tips and Tricks series with your staff? Find all nine editions posted under “D” on the CU*BASE Reference Page.*



TIP #2: What Monthly Email Provides Ongoing Training on Features Already in CU*BASE?

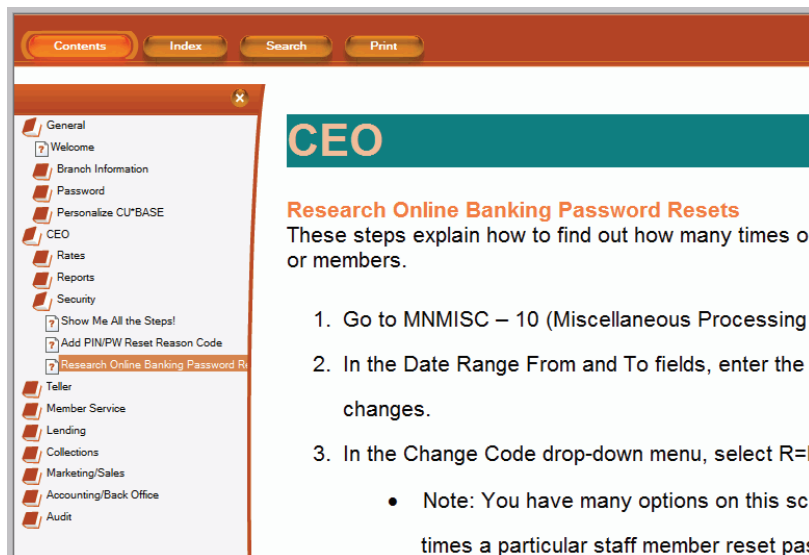
Be sure to check out the “Remember This?” series! Each email provides quick reminders of existing features in CU*BASE with step-by-step directions. This allows you to immediately put it into practice at your credit union.

Also find these directions in the Show Me the Steps Online help!



TIP #3: Where Can I Find Step-by-Step Directions Just for CEOs?

Introducing Show Me the Steps—CEO! Watch this new and growing area of the help system full of helpful step-by-step directions designed just for CEOs.



TIP #4: What Communication Provides Quick Tips Specifically Designed for CEOs?

Be sure to subscribe to the CEO Tickler! Each email includes questions designed to get you thinking of new ways to drive business using dashboards, configurations, etc. in CU*BASE. A second tickler follows and includes menu options needed to access these options.

Use this communication to stay informed about new and existing features in CU*BASE that affect you as a CEO.

Subscribe to this listserv via http://www.cuanswers.com/ceo_ticklers/
You can also view previous Ticklers and their answers on this page.

CEO Tickler May 2012

CU*Answers

Online Banking Password Know

*Nowhere is security more important than in online banking, where financial information is a potential gold mine for hackers. That's very important that you and your staff know the ins and outs of password online banking. Test your own and your team's security knowledge, find these tools in CU*BASE.*

This screen allows you to create a report that shows members have inactive or disabled online banking passwords.

A resource for dormancy monitoring, the report generated from this screen allows you to monitor stale or expired online banking passwords.

This screen helps you find out the number of times you reset member passwords.

Your auditors will love the report generated from this screen!

This tool helps you figure out why members keep having their passwords.

TIP #5: Where Can I Find Detailed Information about CEO-Related Screens in CU*BASE?

Use “Learn about this feature” to access the CU*BASE Online Help. Check out the Management Functions and “Know Your Members” Analysis Tool in the Table of Contents. Not only does each page provide helpful information on using each dashboard – the “TIPS for CEOs” links take you right to tips from Randy Karnes.

Contents Index Search Glossary

Channel Activity by Member Age Group

Screen ID: ICHSUM-01
Screen Title: Channel Activity Summary
Panel Number: 118
Data Source: MACKASUM
Snap Shot: As of Month End Right Now

Ask a Question

Access this screen by selecting MNMGMA #1-Channel Activity by Mbr Age Grp.

- NOTE: Because this dashboard uses End-of-Month data, activity during the current month will not be included.

[TIPS for CEOs](#)
[Go to Examples](#)
[Create full-color PDFs of the data and charts on the screen - PDF Exports](#)
[Learn about downloading data to Excel or a comma-delimited file](#)

TIP #6: Where Can I Find Out More About Upcoming Development That Will Affect My Credit Union?

The CU*Answers Kitchen lists information on key development projects for CU*BASE and **It's Me 247**. This resource is a must read for CEOs interested in what will be included in upcoming releases.

Access this page by clicking “CU*Answers Kitchen” in the green box on the CU*Answers News page (the entry I am a Client page).

In the CU*Answers Kitchen

We're always cooking up new ideas here in the CU*Answers Kitchen and we'd like to share some of our current recipes with you. These are some of the large topic projects that are currently in varying phases of development. These 'recipes' are not designed to show you the nitty-gritty specifics but rather showcase the general ingredients involved and the 'chef' who is your point person if you do want more information.

Click through and check out what's cooking now and check back later to see how the menu changes.

Please note: All targeted implementation dates shown on these pages are subject to change without notice. For the most recent list of projects in the pipeline (updated every week), visit our [Release Planning](#) page.

Bon Appétit!

Recipe	Last Updated
ANR and NSF Fee Enhancements	02/01/2012
ATM/Debit Platform	07/21/2011

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