

Documentation: Tricks of the Trade

Check out this informational series!

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Getting Where You Need to Be

TIP #1: Which Menu Option Should I Use?

With over twenty different menus and countless menu options, it can be daunting to know where to go to get started in CU*BASE.

With that in mind, we have developed the CU*BASE Search to assist you. CU*BASE Search will search both the words in the Option as well as a descriptive text of what you can do with this option to find a match.



Use the CU*BASE Search to find just the Option you need to get started.

TIP #2: Find a Wealth of Documentation by GOLD Screen

Finding documentation on a screen in Online Help is easy. Simply click on "Learn about this Feature" in the lower right hand corner of the screen to access the CU*BASE Online Help.

TIP #3: Find Step-by-Step Instructions on Frequently-Done Tasks

Find step-by-step directions on frequently-done tasks in the Show Me the Steps Online Help. Access this help system by first clicking on the question mark button at the top of any menu screen. Then select "Show Me the Steps Online Help."

Also click the dots or stars to print or save an option in a Menu screen to reveal the same pop-up screen you see in the GOLD Screen.

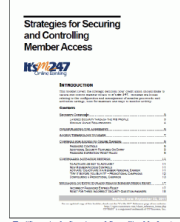
- Workstation Functions
 - Change Employee Password
 - Change User ID Password
 - Activate Auto Security
 - Deactivate Auto Security

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It's Me 247 Documentation

TIP #1: Where Do I Find More About Security Features in It's Me 247?

Interested in learning more about security features in It's Me 247? We recommend you review the booklet "Strategies for Securing and Controlling Member Access to It's Me 247."



The "Strategies for Securing and Controlling Member Access" booklet may assist you with documentation for your next audit.

TIP #2: What Document Has a Complete List of Features Available in It's Me 247?

The It's Me 247 Features List and Overview located in the It's Me 247 Reference Page contains a comprehensive list of the features offered in online banking. Not sure if you have fully implemented the online features available to your credit union? Check out this booklet.

To access this booklet look under "F" or "T" on the It's Me 247 Reference Page. Access this page is shown on the left.

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Report Builder: Canned Queries and Files

TIP #1: How Do I Find the Name of the End-of-Month File?

Not sure what End-of-Month file to use in your Query? The Database Inquiry screen, accessed via the Report Builder screen, accessed via the Query Builder for File and Fields, lists include not only current month filenames but also the corresponding End-of-Month filenames (where applicable) as well!



Use the Database Inquiry screen to view the End-of-Month filenames.

TIP #2: How Do I Access a Listing of Commonly-Used Files from this Screen?

Want to learn more about the most frequently-used files? Click on the "Commonly Used File" button on the Database Inquiry screen to access the "Commonly Used CU*BASE File" help topic in the CU*BASE Online Help.

TIP #3: How Can I Access the "Commonly-Used CU*BASE Files" Topic While in Help?

You can also access the "Commonly-Used CU*BASE Files" topic while in CU*BASE Online help by using Index Keywords "Commonly Used CU*BASE Files."



Use Index Keyword "Commonly Used CU*BASE File" while in CU*BASE.

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CU*BASE Dashboards

TIP #1: Where Can I Find a Listing of the CU*BASE Dashboards?

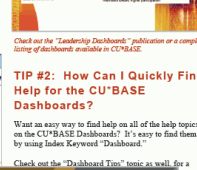
We are introducing more and more dashboards in CU*BASE—so many that we have updated our "Leadership Dashboards" publication. In it you will find a listing of all of our dashboards, grouped by menu and listed by menu option. The right column includes a brief explanation of how you can immediately get this dashboard to live on your system.



Find the 4-page "Leadership Dashboards" under "D" on the CU*BASE Reference Page. Go directly to this publication via http://managers.com/pdf/ch_ref/LeadershipDashboards.pdf

TIP #2: How Can I Quickly Find Help for the CU*BASE Dashboards?

Want an easy way to find help for all of the help topics on the CU*BASE Dashboards? It's easy to find topics by using Index Keyword "Dashboard."



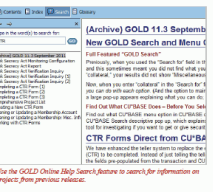
Check out the "Dashboard Tips" topic as well, for a...

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Release Documentation

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

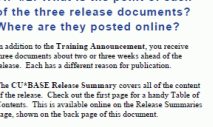
All of the Release Summaries are archived in the CU*BASE Online Help. You can identify these topics since they are all named "(Archive)GOLD" search for specific topics, such as "CTR" (shows to the right) or find them all with Index Keyword "Archive." From these topics you can jump to the release materials and other screen's topics to learn more.



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

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

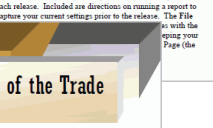
In addition to the Training Announcement, you receive three documents about new releases: a release, a release summary, and a release fact sheet. Each has a different reason for publication.



The 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 in the Release Summary page, shown on the back page of this document.

TIP #3: How Can I Find All the Documentation on e-Documents?

Find all the documents listed in this brochure and more on the CU*Answers eDocuments Strategies website. <http://edocs.cuanswers.com>



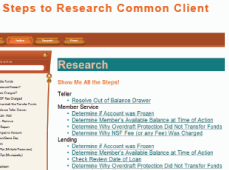
Read the "Going Green" publication to learn more about planning for a more paperless environment.

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Show Me the Steps Research Tools

TIP #1: Where Can I Find Steps to Research Common Client Service Questions?

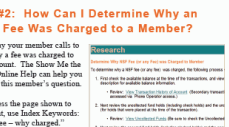
Are you interested in finding out why an NSF fee was charged to a member? Show Me the Steps Online Help has teamed up with the Client Services Department to provide you step-by-step directions to allow you to do the research.



Check out the "Research" section in Show Me the Steps Online Help for links to the help topics related to this question.

TIP #2: How Can I Determine Why an NSF Fee Was Charged to a Member?

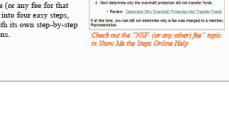
Let's say your member calls to ask why a fee was charged to her account. The Show Me the Steps Online Help can help you answer this member's question.



To access the page shown to the right, use Index Keyword: "NSF fee - why charged?"

TIP #3: What Does it Mean to "Go Paperless"?

The "Going Green: Best Practices for Eliminating Paper" brochure discusses many frequently-asked questions on this subject. This introduction to the subject discusses the process of "going green" from many different angles, giving the reader some insight into the complexities of this subject.



Find this document at edocs.cuanswers.com on the eDocuments section of the Special Interest Docs Page.

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EFT Documentation Tools

TIP #1: Where Can I Find Examples of Credit Card Account Adjustments?

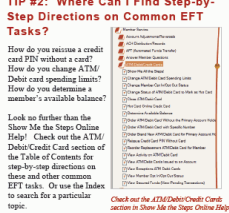
Look no further than the CU*BASE Online Help for examples of credit card account adjustments. These examples have been copied directly from the "Credit Card User Guide" directly to the help topic of the screen you view when making the adjustment.



Examples of credit card adjustments are included right in help. Use Index keywords: credit card adjustment.

TIP #2: Where Can I Find Step-by-Step Directions on Common EFT Tasks?

How do you initiate a credit card PDI without a card? How do you change ATM/Debit card spending limits? How do you determine a member's available balance?



Look no further than the Show Me the Steps Online Help! Check out the ATM/Debit Card section of the Table of Contents for step-by-step directions on these and other common EFT tasks. Or use the Index to search for a particular topic.

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Electronic Document Management Tools

TIP #1: We Don't Currently Have an Electronic Vault? What Can I Read to Learn More?

Are you still considering which vault to choose for your credit union? Want to read more about your choices? Look no further than the "Electronic Document Solutions" brochure shown to the right. In it you will find side-by-side comparisons of the three vault choices to help you determine which is the right choice for your credit union's electronic document strategy.



Are you part of the 10% of credit unions without a vault? Check out this document to find out which electronic document vault is right for your credit union.

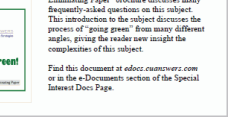
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Q: How can you find out more about the wealth of documentation provided by CU*Answers?

A: Look no further than the monthly Tips and Tricks email series! Find previous issues under "D" on the Reference Page. http://www.cuanswers.com/client_reference.php#D



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