
The CU*BASE Custom Training Edition

Initial Setup, FAQs and End-User Guidelines, and Details about the Quarterly File Refresh Routines



INTRODUCTION

This document is a companion to the overview brochure for the CU*BASE Custom Training Edition (CTE), and includes details about how files are set up, answers to frequently-asked questions, and guidelines about using the CTE for a credit union's day-to-day training needs.

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For an updated copy of this booklet, check out the Reference Materials page of our website:
http://www.cuanswers.com/client_reference.php
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GETTING STARTED

Start by reviewing the program details and pricing in the CU*BASE CTE overview brochure.

2015 Pilot Program!

We are currently looking for credit unions to participate in our 2015 pilot program, helping us field-test the CTE program and contributing to the evolution of its design for other network credit unions.

Keep in mind that the purpose of this pilot program is to verify the file setup and workstation settings in the real-world environment. Enhancements or changes to the program will be considered only after successful completion of the pilot program.




1. Contact Laura Welch-Vilker at 1.800.327.3478 x 144, or via email at lwelch-vilker@cuanswers.com and ask to be part of our 2015 pilot program.
2. Submit a signed copy of the “CUSTOM TRAINING EDITION TERMS & CONDITIONS” agreement. This is a one-year subscription commitment.
3. We will contact you with a target launch date. A minimum of 4 weeks will be required for us to set up your initial CTE environment, copy the files and configure them.
4. Technicians will arrange a remote desktop connection to show your system administrator how to set up launch icons and assist with initial setup on your training workstations.
5. Web-based training sessions will be arranged with your training coordinator or other representatives to explain how users will access the CTE and answer your questions. You will be provided with four login IDs and four employee IDs and passwords for use with the CTE.

GLOSSARY: CTE BASICS

File library	CUTE A# where A# is the assigned CTE library ID (A1, A2, A3, A4, etc.)
Credit union #s	Will be assigned in increments of 1 starting at 7600 (7600, 7601, 7602, etc.)
Credit union name	Will add “CTE” to the beginning of the credit union’s actual name, such as: CTE Success Community Credit Union
User names	CTExx01 through 04 , where xx is the actual CUID of the credit union purchasing the custom training edition (for example, if the credit union’s CUID is CJ, then their user names would be CTECJ01, CTECJ02, CTECJ03, and CTECJ04)
Employee IDs	<p>01, 02, 03, and 04</p> <p>Security for these IDs will be based on the “ST” employee ID template also used by the Bedrock CCU training library</p> <p>AD is reserved for CSR administration support 90, 91, and 92 are reserved for Operations and Programming support</p> <p>Employee ID 89 will NOT be retained in the CTE library. Someone aliased to 92 will be recruited to help create the initial “AD” ID so that it can be used to build the others. <i>(Then someday we’ll automate the process as part of the CTE file creation.)</i></p>

MISCELLANEOUS TIPS

- For workstations used for training purposes, a special CU*BASE CTE icon will be added to the desktop. This icon simply launches CU*BASE GOLD (the same version of the software that your other workstations launch via the usual GOLD icon). To access the CTE, the user must log in using the special user name (such as CTExx01) which is set up to point only to the CTE files.
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- For each training workstation, a CU*BASE CTE icon needs to be pointed to an **XML launch file** that has the alpha ID of the CU that’s been configured for CTE (such as A1, A2, etc.). Use the GOLD Update support link on the Network Links window in CU*BASE, or this URL: <http://updates.cubase.org/files/tools/install/addcte.exe>

*NOTE: This tool adds CTE support to a workstation that **already has GOLD installed**, and it will use the same branch and terminal ID as that workstation. Also, it will work only for CTE libraries that have been set up already on our end. You will be advised when the tool is ready for your use.*

- Every time a new CTE client is added, they will need to receive a new **cusettings.xml** GOLD file in addition to the new icon. This file holds settings for every client, including which CUSO they use and which edition of GOLD they use. GOLD won't work correctly if this file isn't kept updated. The file is keyed by CU ID, and the addition of a new CTE client is essentially the same as adding a new conversion since it adds a CU ID to the file.

FAQs

Will passwords expire?

User names used to log in to CU*BASE will expire with the same frequency as all other user IDs, and can be changed in the same way via the “Change User Name/Login Password” command on the CU*BASE Main Menu (MNMAST).

Employee IDs will be governed by the same policy that the credit union uses for their own employees, as of the time when the CTE files are originally set up. (This is because we will be copying their security master files, which includes the password expiration settings.)

Will we be able to reset our own passwords, or do I need to contact a CSR?

Credit union users will not have the ability to reset passwords for user names nor employee IDs, so they will need to contact a member of the Client Services and Education Team to reset a password as needed. This will be done using the special “AD” administrator employee ID.

Will a CSR be able to access my CTE environment, in case I have a question or need support working with the training files?

Yes, CSRs will have their own administrator login and employee ID to use for support purposes.

What should I do if I get an error message while working in the CTE?

Call Client Services just like when working in your own files. Make sure to tell the CSR that you are working in your CTE library.

How will support be handled for the CTE? Are we able to contact Client Services with questions specific to this product?

The Client Services and Education team will handle all support for CTEs. We will build an Administrative login on each CTE so we can control it.

Do standard issues have a priority over CTE issues?

Yes, normal live production issues will always take priority over any CTE issue.

Will the CTE training environment actually contain my member information?

Yes, your CTE library is an exact duplicate of your memberships files, along with all your products and services, but without your employee security, and minus any employee/board member accounts.

Will CU employees have the ability to look at others employee accounts on this duplicate library?

No. Memberships that are flagged with an Insider/Employee Type Code other than 00 will *not* be copied to the CTE library.

IMPORTANT If your credit union does not currently flag employee, board member and family memberships with these codes, this must be done before the initial file setup to avoid bringing over this sensitive data into your training library.

Why does the CTE only retain current month and one month prior data when the free Bedrock CCU training service retains current and 3 months prior?

This is really due to managing how much space we use on our production system. Since all of our clients share the same Bedrock library, that is just one library and it is therefore practical to retain more history. CTE libraries that are purchased by credit unions must also all reside on the same production system, so to save resources we are limiting prior month history to a single month per credit union.

Are we able to request more or less data scrubbing during the quarterly refresh? For example, if we would like for security settings to be retained, is this possible?

Credit unions will not have access to any security controls for their CTE; these are controlled entirely by CU*Answers. When we refresh the files each quarter, security settings for the 4 employee IDs will be saved off, then after the refresh those settings will be restored so we don't have to set them up from scratch every time.

Having said that, special arrangements may be available for an additional fee. Please contact a Client Services and Education team representative and request a quote. Restrictions apply and we reserve the right to restrict any access deemed necessary to protect data or avoid conflicts with specific software functionality.

Can these be refreshed more often than quarterly?

Yes, but a special request is required and additional fees will be charged. Contact a CSR for a quote. A minimum of 5 weeks notice is required for an unscheduled refresh.

During the quarterly refresh, are changes made in the CTE environment always overwritten with the updated data? Or is it possible to merge data?

Data will be overwritten with exactly what is on the credit union's live files at the time of the refresh.

During the quarterly refresh, if we have changed configurations or added new products, will those show up in the CTE, too?

Yes. Any new products set up in your credit union's "live" library will be copied over to the CTE during the refresh.

Can a CU have both access to Bedrock and CTE?

Yes, but CUs who are paying for a CTE are generally discouraged from maintaining Bedrock logins as well.

Are there any other advantages to CTE beyond having your own member data and products?

We have future plans to expand access to some product configurations, so that credit unions can practice setting up new products and services in a training environment prior to setting them up in their live library. Stay tuned for more details following completion of the pilot program.

Because Bedrock doesn't have real members who make normal "loan" payments, there are a lot of delinquent accounts in that training library. Will that also be true on my CTE?

Since normal daily processing is done on the CTE, it is inevitable that loan accounts that don't receive any payments will eventually start appearing as past due. However, because of the quarterly refresh this will be minimized and hopefully less obvious, especially during the first month or so following the refresh.

Of course any loans that are already delinquent as of the time the data is refreshed from live files will show also past due on the CTE.

With not being able to "order" ATM/debit cards will we still have functionality to go through the process and practice setting those up?

No. Access to those commands will be blocked for your protection.

Will we have access to work ACH exceptions for training purposes after a refresh?

Yes, assuming there were exceptions waiting to be worked when your files were copied, then you will be able to access the ACH exception file after a

refresh. Just remember that once that file is gone, there will not be another until your next file refresh.

Why can't we have 2 digit IDs set up for every one of the credit union's employees at the credit union?

To protect the data in this file and any potential complications from interactions with other production libraries, we are strictly controlling the security access to configurations and other features on the CTE. Therefore our CSRs must handle all security-related tasks. The limited number of user and employee IDs is necessary to make this maintenance manageable and as automated as possible.

Is Bedrock going away?

No. All online credit unions will now have the choice of continuing to use Bedrock CCU, or purchasing a CTE of their own.

Since the member accounts will be the same, how will a user be able to keep track of which files they are working in? We don't want a teller to post their live transactions to the training library by accident.

We recommend that the special CTE icons be placed only on your credit union's training workstations. A user must use a special login ID and employee ID to access these files. Auto Security will be disabled, thus forcing a user to enter the special employee ID for every transaction. This helps to reinforce to the user that they are in a different environment.

Users can also take advantage of the integrated color themes (available under the "Preferences" feature on the CU*BASE main menu) to visually differentiate the CU*BASE screens while working in these files.

What is the \$250 monthly maintenance fee for?

Lots of behind the scenes work by numerous teams, including Client Services and Operations, as well as for the use of the additional space on the production box.

How do software updates work for CTE?

Since your CTE is on the production system and uses the same production-level CU*BASE GOLD software, these workstations will receive updates at the same time and via the same method as all your other workstations. You do not need to do anything special other than close the session and re-launch after an update is deployed.

Can I train on producing e-receipts and capturing electronic signatures on forms, that sort of thing?

No. For security reasons and to avoid added complexity we will not be supporting printing or archiving from the CTE.

Can I use Report Builder while in the CTE?

Yes. Any definitions or database files you create will be saved to a special QUERYxx library (where xx is your CTE ID, such as A1, A2, etc.). QUERYxx will be cleared automatically during each quarterly refresh.

Will I be able to control which software features the 4 designated employee IDs can access?

No. These settings are controlled by CU*Answers and cannot be changed by your credit union. CU*Answers CSRs will be responsible for updating these security settings as changes are made with CU*BASE releases.

In order to keep up with new menu options as they are added or changed over time, we will automatically take a snapshot of the current status for the 4 IDs (plus the special administrator ID) and retain those after the files have been refreshed and your employee data cleared out of the CTE each quarter.

COPYING CREDIT UNION FILES TO THE CTE

This section documents the steps that are taken when the special “CTE refresh” routines are run, either to perform the initial setup of a new CTE library, or to refresh it from live files each quarter.

INITIAL FILE CREATION

1. Saves current live credit union to save file
2. Restores live credit union from save file to CUTExx where xx = A1, or A2, etc.
3. Object authority is granted to CUTExx library
4. Clears the CU*BASE printer configuration file
5. Creates the CUTExx printer/output queue
6. Clears the credit bureau history files
7. Clears the online credit report files including decision files, if used
8. Clears the tracker files
9. Clears the shared branching files including national shared branching
10. Cleans up the ATM/debit/credit card BIN configuration file (PANBIN) to deactivate card maintenance functionality and other features
11. Makes all email addresses invalid
12. Changes the CU name in CU*BASE to have “CTE” in front of the regular CU name
13. Removes the online credit report pull configuration from CU*BASE
14. Changes the retention of transactions to 1 month for all types
15. Changes the bank id to all 9s (an invalid number)
16. Changes the R/T to all 9s (an invalid number)
17. Removes all CU*BASE employee IDs except 90, 91, and 92
18. Removes all CU*BASE employee IDs from menu security in CU*BASE – except 90, 91, and 92 (*includes data in files SECMASST, SECMENU, ACTSEC and ACCLIST*)
19. Creates the CUTExx printer in the CU*BASE printer configuration file – this is the only one in the file
20. Updates all terminal configurations to have the CUTExx printer as the printer for everything
21. Removes all memberships and accounts where the employee type is greater than zero (0)

22. Copies over the latest EOM files to the CUTExxE library
23. Runs the standard CU*BASE transaction purges to have just one month of transactions
24. Adds entry to the CUMSTRPF master file so it can be seen on the Credit Union Navigation Screen used by CU*A staff
25. Create an empty QUERYxx library (where xx is A1, A2, etc.)
26. Clears any supplemental vault configurations

QUARTERLY FILE REFRESH

These steps are performed near the beginning of each calendar quarter to refresh CTE files from current credit union libraries. This process can also be run at other times based on special credit union request (a fee will apply).

1. Saves CU*BASE terminal configuration file in the CTE library
2. Saves CU*BASE printer configuration file in the CTE library
3. Saves CU*BASE security configuration file in the CTE library
4. Save CU*BASE menu security file in the CTE library
5. Deletes the CUTExx custom training library
6. Saves current live credit union to save file
7. Restores live credit union from save file to CUTExx where xx = A1, or A2, etc.
8. Object authority is granted to CUTExx library
9. Restores the saved CU*BASE terminal configuration file
10. Restores the saved CU*BASE printer configuration file
11. Restores the saved CU*BASE security file
12. Restores the saved CU*BASE menu security file
13. Clears the credit bureau history files
14. Clears the online credit report files including decision files, if used
15. Clears the tracker files
16. Clears the shared branching files including national shared branching
17. Cleans up the ATM/debit/credit card BIN configuration file (PANBIN) to deactivate card maintenance functionality and other features
18. Makes all email addresses invalid
19. Changes the CU name in CU*BASE to have "CTE" in front of the regular CU name
20. Removes the online credit report pull configuration from CU*BASE
21. Changes the retention of transactions to 1 month for all types

22. Changes the bank id to all 9s (an invalid number)
23. Changes the R/T to all 9s (an invalid number)
24. Removes all CU*BASE employee IDs except 90, 91, and 92
25. Removes all CU*BASE employee IDs from menu security in CU*BASE – except 90, 91, and 92
26. Creates the CUTExx printer in the CU*BASE printer configuration file – this is the only one in the file
27. Updates all terminal configurations to have the CUTExx printer as the printer for everything
28. Removes all memberships and accounts where the employee type is greater than zero (0)
29. Copies over the latest EOM files to the CUTExxE library
30. Runs the standard CU*BASE transaction purges to have just one month of transactions
31. Clear all files and query definitions from QUERYxx
32. Clears any supplemental vault configurations