



FEP is arriving soon!

The File Expansion Project (FEP) update, which will ramp up your account limits from a million to a billion dollars, will be similar to a regular CU*BASE release. The update does not require that your IT team do anything except the normal verifications you do when you get any other GOLD update. On the morning of your release date, your members will experience some brief interruptions in **It's Me 247** online banking and CU*Talk audio response. (Note: It will not be possible to present a splash page, so you may want to post a note on your website.) But unlike a regular release, there are some steps you'll need to take prior to the FEP update.

Step 1: Get Your Teams Ready

- ▶ Learn about FEP at <http://www.cuanswers.com/kitchen/feping.php>.
- ▶ Watch the FEP video at the above Web address. Choose at least one person, preferably someone who knows a little about your credit union's custom Query reports, to watch this 52-minute training session.
- ▶ Read the FEP FAQs at the above Web address.



Step 2: Get Your Queries Ready

The most visible impact FEP will have at your credit union will be the adjustments you'll need to make to some of your custom Queries. Although the changes cannot be made until after the FEP release, you can start preparing for these adjustments now to make your life a lot easier after FEP arrives.

- ▶ **View a list of all your Queries so you can decide which ones to keep and adjust after the release and which ones to discard.** You can view this list on the Query Analysis Report, which can be printed using the *Print List of Custom Rpts/Inqs* option on the CU*BASE Report Builder 1 (MNQURY) menu. In your HOLDxx OUTQ,



look for QPQUPRFL in the “File” column and QUERYXX (where XX is your CUID) in the “User Data” column.

- What does the “Last Use Date” on this report mean? (Search for Question 3994 in AnswerBook.)
- What does the “Change Date” on this report mean? (AnswerBook Question 3995)

▶ **Decide which Queries you no longer need and delete them.**

- What’s the easiest way to delete a batch of Query definitions? (AnswerBook Question 4035)

▶ **Decide which Queries you’d like to keep and print a Query definition report for each one.** (IMPORTANT: Although the Query adjustments cannot be made until after the release, the Query definition reports must be printed prior to the release. After the release, you will no longer be able to see the original configuration of your custom Queries.) We’ve published some tips in AnswerBook for the best way to organize the list of remaining Queries, to see which ones might need attention, and of those, which ones should be tackled first to avoid problems. You might find, like our beta credit unions, that you only have a handful of items that actually need any work.

- What kinds of adjustments will my Queries typically need? (AnswerBook Question 4013)
- How can I tell which Queries might be affected? (AnswerBook Question 3996)
- How should I prioritize which Queries need attention? (AnswerBook Question 4000)
- What’s the best way to print a batch of Query Definition Reports? (AnswerBook Question 3998)
- Need a refresher on Query? Sign up for Query training at <http://cuanswers.com/education/syllabi/?course=4.20>.

Step 3: Get Your Vendors Ready

▶ **ALM vendor:**

- **Model, Expert, or Compass files:** If you use any of these three file formats to download from CU*BASE to your ALM vendor, give your ALM vendor this document regarding file changes which can be found at http://www.cuanswers.com/pdf/kitchen/ALMDownloads_FileChanges.pdf.
- **McQueen files:** We’re taking care of this vendor ourselves.
- **AIRES files:** AIRES files are not changing with FEP.



▶ **Other vendors:** If you have any custom Queries that produce a database file that you transmit to a third-party vendor yourself (not things that our Operations team does for you) and if your Query uses fields from the expanded files, you’ll need to let your vendor know about balance and transaction dollar amounts that will be expanding, or dates that may be in a new format.

- Prioritizing Queries that produce files for outside vendors (AnswerBook Question 4010)
- My vendor wants file samples before I go to FEP. Can I do that? (AnswerBook Question 4011)
- What is the FEP effect on file uploads into CU*BASE? (AnswerBook Question 4012)

Learn more at <http://www.cuanswers.com/kitchen/feping.php>.