



CU*BASE

10.6

CU*BASE[®] Software Upgrade

Online CUs	CU*NorthWest/CU*South	Self Processing CUs
February 13, 2011	February 20, 2011	February 21-22, 2011

Updated booklets  mentioned in this summary will be available on our website no later than **February 11, 2011**. Access the CU*BASE Reference Page by selecting "I am a Client" from <http://www.cuanswers.com>, Docs & Information, then CU*BASE Reference. Access the "It's Me 247" Reference Page by selecting "I am a Client" from <http://www.cuanswers.com>, Docs & Information, then It's Me Reference. Documentation will also be available through the What's New topic in online help when you get the release. Updated online help , including the "What's New" summary list of all changes, will be included when you receive the release.

File Changes for Loan Category Expansion

With the natural growth of our network, and as we increasingly have credit unions with more complex portfolios, we have found that our current two-digit loan category code system does not meet the needs of our clients. This is a limitation we have wanted to overcome, so we are moving to an alpha-numeric loan category code, effectively expanding the number of codes available from 99 to over 1,200.

With this release we have accomplished Step 1 of this process – making the file changes necessary for the expansion. This sounds like a simple change, but in fact it is quite a major undertaking since it required that we make changes to many CU*BASE files. In fact *over 841 CU*BASE and over 1,600 custom programs* were touched with this release! As you can see, this release was a mammoth effort!

You won't actually see any changes with this release (meaning don't try to create alphabetic codes *just yet*), but this will set the stage for the remaining changes that you will see in the upcoming 11.0 release.

This is just in time for our credit unions who had exhausted all their options for category codes, but it is good news for all credit unions...we intend to take full advantage of this change to beef up many of our most heavily-used reports. Look in the upcoming 11.0 Release for modifications of many reports and dashboards to add features such as Business Unit selection, breakdown of data based on who owns the loan, and more of the new standardized technique allowing the unlimited selection of codes (such as loan category, branch, etc.). *Watch for this all in the next release!*

Miscellaneous

- **FSCC Shared Branching Transaction Receipts Now Reformatted with Masking and for ProDOC** –FSCC receipts are now standardized to match our CU*BASE receipt format. This reformatting allows us to mask the member's account number on these receipts, just as with other receipts printed from our system. (Carswell Printers: When an FSCC account has a non-standard 10-digit account number, the same number of digits will be masked; one extra digit will appear unmasked).
- **OFAC Scan Run on Loan Disbursement Check Payees** - With the 10.3 Release, we introduced OFAC scans on payees of corporate checks printed via Phone Operator. With this release, we have expanded this feature and will also run OFAC scans on payees of loan disbursement checks printed via Lending Menu (MNLOAN) #2-Disburse Member Loan Funds.
- **OFAC and Blocked Person Scans on Members Added via Pre-Member Lending** – CU*BASE will now run OFAC and Blocked Person scans on all non-members added during pre-member lending. The scans will follow new membership workflow controls and occur directly after the non-member information is entered.
- **Save Button Moved When Adding a Tracker Conversation** – Tracker users take notice! Based on a special request by the members of our Collections Round Table, the F5-Save/Continue button has turned blue and is now in the lower right hand corner of the Member Tracker Entry screen

(next to where you view previous conversation text). While this is not a change in functionality for keyboard users, this enhancement should assist mouse-users in accurately selecting the Save button. (The old position put the Save button directly next to the Backup button, making it a bit too easy to lose all of the text you just typed.)

- **Origin Code of Reversed Transactions Changed to 08** – Transaction reversals will now be indicated by an Origin Code of 08.
- **Changes to Loan Security Code Analysis Report** – The credit card sections of the Loan Security Code (Reports D Menu (MNRPTD) #3- Loan Security Code Analysis) are now broken down by member accounts (by security code), rather than the previous breakdown by credit card detail (by bucket). Additionally, loans with a zero-dollar balance will no longer appear in the results.



Immediate Effect

Changes automatically in place on the day the release is implemented; no additional configuration required.



Must be Activated

Your CU must make a decision either to activate it or modify configuration parameters. Sometimes requires contacting a CSR.



Team Implementation

Work with a CU*BASE Client Service Representative before implementation.