

10/13

CU*BASE® Monthly Monitor Recap

October 2013

Your credit union is part of the CU*Answers collaborative network, your network. Even during the File Expansion Project (FEP), we remain responsive to your needs and continue to implement a significant amount of programming each month. The CU*BASE Monthly Monitor Recap is designed to keep you informed in an ongoing basis of feature improvements, vendor enhancements, and other miscellaneous changes to CU*BASE and our other core software products.

This specific Monthly Monitor Recap covers programming changes implemented during the month of October.

To learn more about all projects in the pipeline, refer to the Monitor website at <http://monitor.cuanswers.com/>

Enhancements

- The Metro 2 Credit Bureau reporting file will be adjusted to include reporting for organizational accounts. This will provide the opportunity for organizational accounts that have individual guarantors to build a credit file to report to the bureau.
- Updated MNGELE, option 8 to report based on delinquency days using a 30 day month calculation – Release 13.3 will be phase 2 to change the screen selection to be for #days
- Phase II of CC / ATM / Debit Card Encryption - Clean up and adding better handling for encryption errors, address backup/archival files, bins and other data that cross between credit cards, and OTB cards
- Service charge rewrite - handling custom fee requests; post on loan accounts, additional option for running annually on anniversary month, etc.
- Tiered Services/Marketing Clubs additions; points for ACH loan payments, valid email address, e-Notices/e-Alerts, Mobile Web/Text, Marketing Opt In, Reg E, etc.
- Enhancements to freezes – differentiate manual vs system generated
- Developed the Instant Card Issue feature for online credit card processing for new and replacement cards.
- Targeted Tiered Score Analysis dashboard (new front-end filters)
- Enhancements to ICI error messaging for ATM/Debit/Credit
- Updated date 1 and date 2 options on the Loan/Share Trial Bal. Review to ensure the dates remain consistent throughout the analysis.
- Changed draft summary stats to emulate the process verification program
- Added Function Key to Inquiry/Phone Operator for CPI History Information
- OUTQ Routing Control changes to support new pricing structure for CU*Archives (effective Oct 1, 2013)
- WCUL - Generic Form Fixes to Adverse Action - Modified form to populate a co-borrower if attached as well as the borrower's information/name in the top right hand corner.
- WCUL - 6 New Generic Share form creations
- Form change for marital status (GMAP form) - GOLD screen change enhancement
- Update statement program for closed accounts and joints/comakers
- Enhanced Legacy Check Ordering Process to include Joint Owner/Phone Number

Internal Enhancements

- Added *NOMAX to printer file override to allow loan information report to run without getting error message.
- Added local date and time to matching criteria to Visa messages on Site4 to prevent false duplicates.
- Created a new service charge billing report for use in billing as a result of the service charge rewrite
- Eliminated payroll program from locking the MEMBER file
- TCD Processing - Created a file (or add to the SVJRNL file) that will log the error messages information received in teller posting.
- Created a program that will allow operations staff to select a set of EOM files to be deleted.
- Updated Toolbox Library Creation Naming
- Updated order of bringing up and down ISOxxx subsystems and ISOPOST and ISOMSG
- MNINQY, #7 screen is no longer dropping to green on both ING and GOLD
- Eliminated LBDLN and LATTR from BOD as part of the archive pricing, and outq routing changes

Miscellaneous

- Programs that can post transactions to credit cards have been updated to more accurately analyze available interest rate buckets for each member and assign the transactions to the correct interest rate.
- Updated the credit card maintenance process to remove the Scorecard Rewards flag from the member record after the card maintenance file has been generated.
- Eliminated error message received when updating statuses on accounts both closed and open end loans in MNCOLL, option 7
- Eliminated bad data error when transaction is a savings type (S), amount is greater than 100,000.00, and origin = 08 in MNGELE, option 21
- 'Predefined comment' for a member via audio/home banking comment is now updating properly from MNUPDT, option 23
- Eliminated error when verifying the AIRESLN file, it is no longer dropping the cents off the balance in MNFILE, option 16 and 1.
- Eliminated error message when running reports from the Loan Portfolio Concentration Risk screen, MNAUDT, option 16 when calculation includes negative balances.
- Statement style fees are now posting with the correct tran code when config is set to something other than SH, SD, IR, or TX
- Correction made to global search so that last four digits of card look up is now properly pulling up accounts that have loans other than a credit card loan.
- The PLEGACY program is now setting the correct indicator to display joint name on screen when the secondary name is a non-member.
- Loan concentration analysis is now properly showing credit scores for all members with scores.
- Eliminated error where secondary and authorized user emboss requests for credit card reorders were not being sent to PEMCO for all cardholders on a credit card. Embossing requests are now being sent and the cardholder names will now appear.
- Eliminated overriding error of "Y" in the Order PIN Flag when a credit card is ordered if the client unselected the PIN Mailer, or when the default configuration was not to order a PIN Mailer.
- Eliminated MICR line error when posting a draft file on a different day than when the file was received.
- Information for the report on the Calc/Post Adjustment for delinquent loans is now consistent with the screen display when loan categories contain both MEMBER5 and MEMER6 records.
- Eliminated error in card maintenance process to prevent new card orders to be sent if the card status is other than ACTIVE at the time the file is created.

- Updated '# Loans' tab within Where Your Members Borrow Dashboard to display graphical information
- Changed command key from Cmd5/-Confirm/Update to Cmd/5-Confirm/Update to work with ING scripting.
- Max disbursement limit are now displayed as whole dollars in GOLD
- Removed '0 for none' note in the Credit Card Number Presentation window
- In MNCNFA #5, when changing the loan account details for a form, you are now allowed to uncheck options so they are removed from the form
- When exporting to excel from Gold in MNMGMT, option 21, the information is now displaying correctly.
- Auto Approval and Review Decision buttons are now properly showing in GOLD
- Membership Designations exclusions are now enforced for the ballot software in MNCNFE, option 15
- GOLD Change - Formatting for Rate after maturity field was adjusted to XXX.XX to match host
- Process dates are now recognized properly when entering date in GOLD utilizing Loan Maturity Analysis
- Eliminated error message in MNCNFB, option 14 to re-price medallion.
- Restricted account number entry to 9 characters to avoid getting screen drop in GOLD
- Eliminated invalid characters in the joint owner field when CUSC/FSCC shared branching transactions are being performed to prevent error messages.
- Eliminated error when deleting nicknames on account suffixes in ItsMe247.