

Setting Up Your Training Library

Steps for setting up and maintaining a CU*BASE training library

INTRODUCTION

This booklet describes tools that make it easy for a self-processing credit union client to set up a separate set of member files that your staff can use when they are learning CU*BASE, with a *copy* of your actual accounts so that staff can experiment, open and close memberships and sub-accounts, post some test transactions, and basically play around without risk to your live member data.



SELF PROCESSOR CHECKLIST: Initial setup needs to be done only **once**. Refresh the files **periodically** or as often as needed. Run the daily routine **every day** to prep files for that day's training.

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Revision date: April 8, 2014

OVERVIEW

In a nutshell, you will use an option on the On-Demand Processing menu (OPER > #7) to automatically:

- Make a copy of your member files from an EOD backup,
- Set up the new library with a unique name of FILE99,
- Update the processing date properly,
- Clean up history files to use disk space most efficiently,
- Set up a set of login IDs, and
- Pare down the Employee ID configurations to be unique to a training environment.

...all in just a few easy automated steps, with fewer opportunities for error compared to manually copying and cleaning up the files yourself. Not only does the process reduce the risk to your live member data, it also makes it easy to periodically refresh your training library and increase its use as a training tool for staff.

Don't be intimidated by the length of the instructions below; several of the steps only need to be done once, the first time you set up a file. From that point on, you'll find it will only take a few minutes to get a fresh set of files as needed.

***IMPORTANT:** This feature is designed for **self processing credit unions only**, not service bureaus like our *cuasterisk.com* partners who serve multiple credit unions from the same System *i*. The process allows for **one training library per System *i* system**. (If your staff serves members of more than one CU, they can still be given access to this one central training library, of course.)*

FAQs

Q: How often should I refresh my training files?

A: As often as you like. Really, there is no right schedule for refreshing files. A lot depends on how frequently they are used, for what purposes, how much maintenance is done during training, and how often you change major configurations (i.e., adding new products and services, changing fees, etc.) that would affect how the system works during training.

Another thing to keep in mind: If the Employee IDs that are in your FILE99 library aren't used frequently, you might forget what the passwords are! Refreshing the files forces you to copy in current IDs and set up training IDs so that passwords are relatively recent. And doing the daily prep task ensures that your TRAIN User ID and password gets used regularly, too.

Q: What if I already set up a training library the "old" way?

A: In the past the instructions for setting up a training library used a different (and rather confusing) naming convention for the library, and there was also a special job description that was used for setting up System *i* User IDs. If you would like to start fresh with this new system, please contact a CU*Answers Client Service Representative and we can make arrangements

to help you clean up your old training files, make sure you have the proper Job Description for new user profiles, and verify that all of your settings are ready to use the new method.

We can even run the refresh process for you the first time and help you set up your first User ID(s), retain any needed device configurations from your previous training library, reset any existing profiles so they point to the new file name, and generally provide any other assistance you might need to get off to a clean start.

SECURITY ALERT!

Remember that this procedure makes a copy of your live files. While this makes it easier for staff to learn, since they can experiment with the same configuration settings and familiar accounts they use every day, there is an important factor to consider from a security standpoint: **The training files will contain private member information!** The same guidelines and procedures that you have in place to protect this critical information from being divulged to inappropriate parties must also be in place for your training files.

This includes not only things like the ability to download files, but also the user ID/password access itself. What is your policy for when an employee leaves the CU? **If they were using a shared User ID for test files, that password should be changed immediately.**

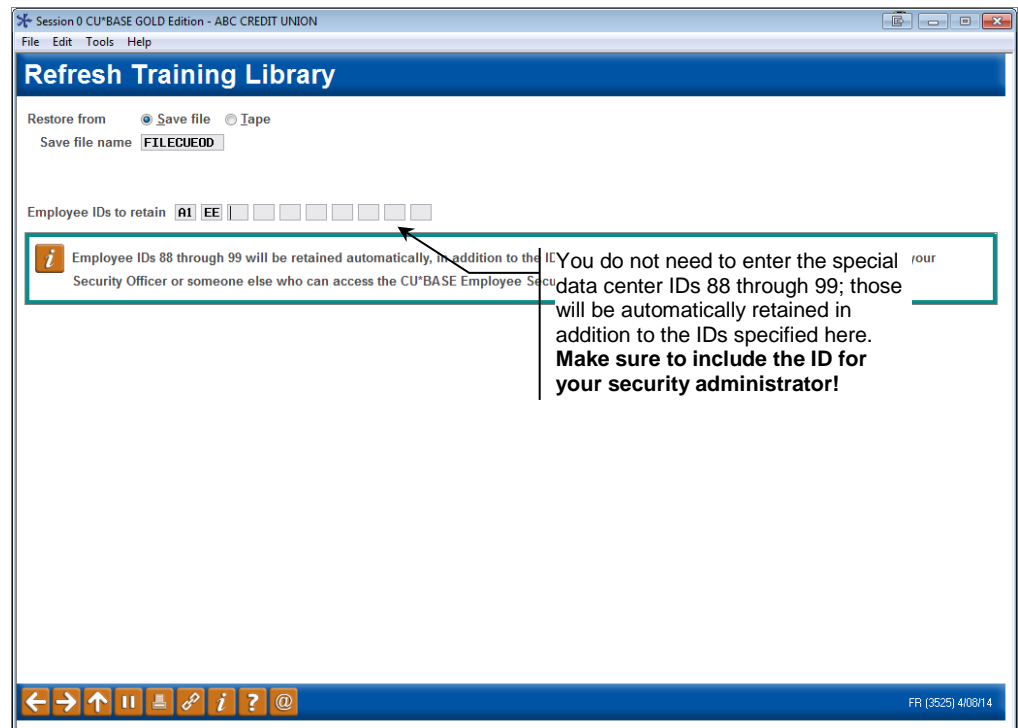
SETTING UP THE TRAINING DATA: STEP BY STEP

STEP 1: REFRESH DATA

This step can be done any time you want to make a fresh copy of your member data to be used as training files (FILE99). This step copies a recent EOD backup, either from a save file or from a backup tape.

To prevent problems it's best to make sure everyone is logged out of the training library before proceeding.

- 1) Sign on using your own, personal User ID (you must have administrator privileges so that you can copy files)
- 2) From any CU*BASE menu, use speed sequence OPER to access the Operations menus
- 3) Select option 7, On-Demand Processing
- 4) Select option 12, Refresh Training Library to display the following screen:



- 5) Complete the fields as described below:

Field Name	Description
Restore from	Choose one: Save File (S) (backup is stored on disk) Tape (T) (backup is coming from a tape) NOTE: If restoring from a backup tape, the system will check to see if your credit union is set up to use

Field Name	Description
	Defense MD for encryption, and will automatically restore accordingly.
Save file name	Appears only if you are restoring from a Save File. Enter FILExxEOD where xx is your credit union ID.
Tape device	Appears only if you are restoring from a backup Tape. Enter the name of the tape device where the backup files are stored. If your credit union uses Defense MD for encryption of backup tapes, the DMDRSTLIB command prompt screen will appear next to let you define additional parameters such as date, sequence number, etc. The “Restore to library” setting should be FILE99 in this case. Refer to the Defense MD booklet for help.
Encryption ID	Appears only if you are restoring from a backup Tape. This field is used only if your credit union uses Defense MD for encryption of backup tapes. Without an encryption product code, files cannot be decrypted. Refer to the separate Defense MD booklet for more information.
Employee IDs to retain	When files are copied, the system will automatically strip out ALL employee IDs from the Employee Security master file, except for the following: <ul style="list-style-type: none"> 88 through 99, which are specially-designated data center and automated processing IDs. Up to 10 individual employee IDs you specify here. <p>Be sure to retain at least the ID of your Security Administrator or someone with authority to access the Employee Security feature (MNMGMT #1) and set up new training IDs.</p>

- 6) Press Enter to set up your training files. The following will be done automatically:
- Will copy the FILExx library (where xx is your credit union ID) to a new file called **FILE99**. (If FILE99 already existed from a previous refresh, it will first be deleted, after saving out the printer/workstation device configurations.)
 - Will create a new blank file called FILE99E.

To save disk space, history from your FILExxE library is not copied over; however, a blank FILE99E must exist so you do not risk your real library if someone uses the command to update a transaction description or modify an IRA posting code, etc.)
 - If necessary, will create a 99 entry in your CU Master Profile file CUMSTRPF (OPER > 10 > 3). This only needs to be done once. NOTE: The *Available for processing* flag should always be set to **X = Never** on this entry.

Available for processing



- Will refresh all bank IDs to use account # and R&T # 999999999. That way you can practice producing checks but they won't be valid.
- Will delete all employee IDs and related security settings, *except* for 88-99 and those you specified on the selection screen,
- Will remove unnecessary files from the new FILE99 library, such as statement work files (S.*) and ATM month-to-date files.
- Changes the credit union name (in both Chart of Accounts configuration and Master CU Parameters configuration) to **TRAINING LIBRARY**.
- Device configurations: If FILE99 already existed, the system will retain the terminal and printer device configuration files from the previous copy and reapply them to the refreshed files. If running this process for the first time, follow the instructions below to clean up your device configurations.

STEP 2: CLEAN UP DEVICE CONFIGURATIONS (1ST TIME ONLY)

This step needs to be done the very first time you set up your training files, because the first time the FILE99 library is created, all of your existing workstation and printer devices are also copied.

It is generally recommended that the training environment be restricted to only a few select workstations within your credit union. Any workstations that are configured in the training library should be directed at one specific report, check and receipt printer.

- 7) From any CU*BASE menu, select speed sequence MNCNFC.
- 8) Choose **CU Hardware Configuration**.
- 9) Either delete or modify both printer and workstation devices so that workstations used for training are directed to printers where the output won't accidentally get confused with live production.

For example, we do not recommend that you print test teller receipts using a printer at the teller line during normal business hours because a test receipt may accidentally wind up in a member's hands.

The next time you refresh your training files, the modified devices will be copied off then reapplied to the fresh copy of your files, so this cleanup only needs to be done once.

STEP 3: SET UP USER IDS (1ST TIME ONLY)

In order for an employee to work with the training files, they will need to log on to CU*BASE using a different USERID and password than they use for day-to-day work.

We recommend that you create at least one special ID, usually designated as **TRAIN**, but you can create additional ones as needed. In any case, **be sure to use a different naming convention** than your normal USERIDs, such as TRAIN1, TRAIN2, etc., to help differentiate them.

This step only needs to be done once, as your User IDs are unaffected when you refresh your training library in the future.

Security Reminder: If someone who knows this ID and password leaves your employ, protect the private information that is stored in these files by **immediately changing the password** for this shared User ID. Depending on how you've set up your Employee IDs (see below), you may also need to change other passwords or delete IDs to which that employee had access on the training library.

- 10) Log on to CU*BASE using your own, personal USERID (must have authority to create new users) and get to a command line
- 11) Creating User Profiles as usual, making sure to set the following parameters:
 - On screen 1, be sure to assign a name for the new user profile that clearly differentiates it from your regular IDs, such as TRAIN or TRAIN1, TRAIN2, etc. Also use the description to specify that this is a special ID used only for training purposes.
 - On screen 2 (Additional Parameters), the **Job description** must be set to **TR99**. If you do not have this job description, contact CU*Answers for assistance getting this set up. **This step is critical, as this is what points the profile to the FILE99 training library instead of your live files.**
 - Other parameters should be the same as these types of employees would normally have set up. For example, if your new tellers and MSRs will be using this ID, then the remaining parameters should mirror how your regular teller and MSR IDs are configured.

If you are unsure of these steps, or if you already have a TRAIN profile and are not sure if it is pointing to the correct library, please contact a member of the CU*Answers System i Support Team for assistance.

STEP 4: ADJUST EMPLOYEE IDS

The only employee IDs that will exist in the refreshed training library are 88 through 99 and any that you specified to retain when refreshing the files. Therefore you may need to create at least one training Employee ID that employees can use to access various menu options.

The number of IDs and their configuration will depend on how you wish the training files to be used. For example, you might want to use training files only for Teller Posting and other basic member functions, in which case you might create an ID or two that have access to options on the Member Service (MNSERV) menu and very little else.

*CU*TIP: To help employees keep straight which file library they are in while training, we recommend you do NOT assign the same IDs that they will use for routine work. The only person who will use the same ID in both libraries should be your security administrator or other person authorized to maintain IDs for other employees.*

Each time you refresh files the following steps must be repeated*:

- 12) Log in to the training files by **using a designated training User ID** (NOT your personal User ID) so that you are pointing to the FILE99 library
- 13) From any CU*BASE menu, select speed sequence MNMGMT
- 14) Select **CU*BASE Employee Security**

Remember that in order to access this command you will need to use one of the Employee IDs that were retained when refreshing the files.

- 15) Create employee IDs as usual; refer to online help for instructions and tips

***CU*TIP:** If you refresh your training files often, you could create training IDs in your live files but deactivate them by removing the password. Then enter those IDs into the selection screen when refreshing the files. Then all you need to do is enter a new password for these IDs after the files have been refreshed.

NEW DAILY ROUTINE: PREPARING FILES FOR TODAY'S TRAINING

After the above steps have been done and the training libraries are ready to go, the only thing left to do is add a new task to your credit union's daily routine.

This process mimics some critical steps that are normally completed during your EOD / BOD processes. But since you won't be running EOD and BOD on your training files, at the minimum certain steps such as updating the processing date and initializing the teller system need to be done so that employees can post transactions to the training accounts.

Although it's not absolutely required that this option be run for all training tasks your employees might need to do, there are a few options where warning messages (such as "invalid processing date") might cause confusion for your staff. Therefore, we recommend this process be completed any working day where training files are going to be needed, usually early in the morning before anyone needs to log on.

- 1) Log in to the training files by **using a designated training User ID** (NOT your personal User ID) so that you are pointing to the FILE99 library

NOTE: This option will not run if you are in your live files accidentally. If that happens, you'll see the message: "This option only available on the Training Library."

- 2) From any CU*BASE menu, use speed sequence OPER to access the Operations menus
- 3) Select option 7, On-Demand Processing
- 4) Select option 13, Prep Training Lib for Daily Use
- 5) Press Enter to begin; the following procedures will be completed on your FILE99 training files:
 - Initialize the teller system so posting can be done (clears teller work files from a previous day's work, similar to what it done during normal BOD Teller processing).
 - Reset the processing date and update the date file to the correct date (this avoids error messages on various commands that rely on these to be in synch).