

The CU*BASE Monthly Monitor Recap is designed to keep you informed on 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 July.

Enhancement

- 42136 Updated Payveris Bill Pay to retain transactions in a new history file as well as created a purge process
- 37338 Updated the backup and cancel functionality on the variable rate screen in loan creation when an update variable rate is attached to the loan
- 38730 Verbiage change to the export windows used by various dashboards to better explain the results
- 40582 Added ability to assign check holds in direct mail posting
- 41267 Added export to PDF/Excel/CSV options to the 2 new Cross Sales Dashboards
- 36701 Updated Loan Risk Analysis report on MNRSK1 #1 to allow for breaking on the loan category

Internal Enhancement

- 42008 Added active and inactive member counts to internal billing for Payveris
- 40735 Created a single generic draft receive screen with options for in balance not in balance to assist Operations
- 41381 Automated the manual process of getting an IRS test file to operations for upload to IRS (used for sending test files to the IRS)
- 41890 Added "Last Receive Date" to AFLAC screen option to the unlock and edit field when necessary
- 42161 Added warning message when AFLAC configuration file is empty in CPI receive and post programs
- 42239 Created a MY CU TODAY recovery application to ensure all daily data transmissions are accounted for
- 42559 Modified the Clear EOD and BOD save files option so the cancel option can be used accurately
- 42614 Revised the A2A polling program to check for stand-in flag within the CUMSTRPF file

Presentation Changes

- 41838 When requesting a credit report, the 2nd 4 digit zip code field displays correctly in the requested area
- 42113 Updated MNSERV, #1 to correctly identify and highlight the currently serving person's information if it is not the primary member on the account

- 42166 Restricted GOLD from attempting to draw charts before data is displayed in dashboards
- 42173 Updated the Smart Links Configuration Dashboard column headers to refresh based on the selection criteria
- 42178 Changed the function key label on the draft receive screen to make sure that all warning conditions display in GOLD
- 42272 Added GOLD to the CTE creation and refresh process
- 42363 The Next Suggested Product 'alert' in Phone Operator is now formatted to how it's set up in MNTRAK #13
- 42440 Added an edit message on the pop-up window of the personal banker screen when the account is not found
- 42531 Update GOLD panel for repetitive queries for HOLDXX output to correctly pass data to the host
- 42584 Added the refresh function on the GOLD screen (F8) which appears in Member and Account retention programs

EFT Modifications

- 40897 MANDATE – Shazam Original Credit Card Transactions (OCT) are now identified so funds are immediately posted instead of following the ATM/Debit hold process.
- 37927 Vantiv clients with PSCS processing ID ONLY: End Of Day processing will now be deleting expired card records from the OTBMST2 file.
- 40864 Cleared communication buffer on both the Vendor program and Server program on a communication interruption
- 40892 Included Segment CH19B in Name Change Requests for COOP batch maintenance to prevent card maintenance rejections at COOP
- 41448 PANCARD and CCCTGDAT will now display the first 6-digits of the BIN number a card is attached to
- 42307 JHA clients only. If the PIN and the SIG vendor are the same vendor within PANBIN, the PANMNT file will be cleared out correctly after ATM/Debit Batch Maintenance is performed
- 42381 Upgraded the Card Wizard software (Instant Card Issue) to version 6.3

Web Modifications

- 42218 Updated the smart message graphics used for credit scores
- 42429 When choosing color themes in It's Me 247, the My Documents tab is displayed correctly on the screen
- 42604 Removed Username/Account and Password boxes from the online loan app snippet for CU*BASE SE

Internal Modifications

- 42517 Changed the magic writer polling program to softly shut down during stand IN before the call to TAR2

- 41273 Eliminated objects taking up space in QUERYxx libraries when running the Trial Balance report where selection yielded no results.
- 42560 Modified Learn from Peer self processor file transfer to delete files in operator before the copy file command
- 42612 Email updates to the GOA projects and the Payveris operations program
- 41618 Added an object lock check to the save EOM files program
- 42315 Changed tracker files to start reusing deleted records and to eliminate the month end re-organization of the files

Update to Avoid User Error

- 42167 Added warning prompt when configuring a call type or primary subject code for the phone operator wrap up tool when user attempts to create a "blank" record

Modifications

- 38137 Updated Current Rate and Current APY on Misc Member Account Forms to print rates that are 0.00% instead of appearing blank
- 38529 Updated the Transfer option from the skip pay function on MNSERV, #26 to no longer require account to be flagged to allow shared branching
- 40484 Added support in the new Links project for getting the member base when the SSN is known and vice versa
- 40698 Updated automated query processing to capture level check errors and include the exceptions on the Audit Report
- 41750 Updated the dormancy fee program to determine the priority of the accounts to fee to use the DIVAPL code rather than the suffix range
- 42124 Added safeguards to the Payveris good funds posting file
- 42314 Eliminated error when changing the printer ID in loan app if no form entries are listed and attempting to print standard apps
- 41078 When processing an in-house check the tracker review is now properly displaying the depositing account
- 38780 Eliminated maximum number of records for share insurance report to allow for large volumes of data
- 41878 Updated the loan application to display aggregate collateral to the amount pledged when there is more than one piece of collateral
- 42308 Modified Learn-from-Peer Online Bank Security Activity to display CU data when using Compare to my CU
- 42471 Eliminated error message when displaying a closed account with a death date prior to 1941
- 34743 Changed automated credit pull type 10 to honor the retention period in decision to determine if new report should be pulled
- 38257 Eliminated lock on files when charging off savings accounts
- 38855 The Loan Maturity Analysis Report is now selecting balloon loans from the correct field and including loans with suspended loan categories.
- 42143 Updated the Transfer Funds Maint Screen to retain the Transfer from or transfer to account number after adding or editing an AFT/CFT record

- 42376 Updated the option "Update Misc Secured Funds Info" to display the last 4 digits of the PAN instead of the last 4 digits of the encrypted PAN or instead of a fully masked field
- 42592 Member Branch Adjustment report is now displaying the correct accrued G/L for loan products
- 42379 Updated the loan risk score analysis report to pull loan office information from the approval ID in the MEMBER file.
- 42507 Added a purge of GL TR audit (breadcrumbs) file to the program that purges the GL history file
- 42521 Eliminated processing error in Associated Banks draft returns
- 37013 Adjusted the Total and Net CU Part % on the Participation Loan Analysis screen to exclude closed records
- 37364 Modified the TBCDTB1 report to include the CD dividends when the total dividend withdrawals are greater than the total dividends paid
- 40792 Moved "loan officer" field from acct info update to misc loan maintenance so all four emp IDs are in one place
- 40894 Corrected the ADD option for automated query config to pull in only the files defined in the query
- 41577 Reorganized columns on the Loan Payments Analysis Dashboard to make it easier to understand
- 41817 Added a field that specifies if the Fannie Mae reporting Surf file includes all loans in MNPART #10 to prepare for Feb 2017 reporting changes
- 41954 Updated the Skip Pay program to recognize all setup programs correctly
- 42097 Improved the save feature when activating debit card round up via Member Personal Banker
- 42172 Added screen IDs to OPER screens to allow online help
- 42420 Updated Closed Master Maintenance to show correct year of death when prior to 1940
- 42458 Updated the file archive process to grant all users authority to all files created by the process
- 42572 Eliminated error in EOD when closing CD accounts with alpha CD types
- 42591 Modified the Learn From Peer Online Banking Security password settings screen to allow column sorting
- 42640 Budgeting History is now displaying data for the most recent budget year
- 42681 Corrected error with 4 digit CU entry in table configuring credit union soft pulls
- 42498 Change to stand-in process when changes are made to MASTER to assure that the status of files are changed back appropriately. Also changed close process to only move MASTER records with a closed status to MSHIST
- 42577 Updated the open payables report to pull the proper number of copies into the selection.
- 42056 Modification to check blocked persons database when approving online membership applications
- 42695 Modified the online banking programs where they determine stand-in status.

- 38003 Will now allow enrollment for eNotices in personal banker even when membership designation is configured to hide the 000 share account
- 40027 Cleared G/L off-ages when using Proc Code T in national shared branching
- 40103 Created a program that will clear file GLUNPOWF at EOD to prevent the user from getting erroneous error when maintaining general ledger entries
- 42387 Corrected the "contract loan interest this period" value in the summary section of statements to show dollars and cents instead of whole dollars
- 42251 Corrected the Payveris posting program to not reverse and fee a credit transaction when the account is negative
- 41891 Corrected error message when attempting to 'Save Settings' for MNRPTB 1 report while 'Export to file' is checked
- 36120 Created a purge program that will delete records from OFACNOTE that are more than 5 years old