# CU\*BASE\*

# October 2017

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 October.

# **EFT Modifications**

- 45033 Modified the RECON matching process to use a different field to identify the true settlement date for STAR Access Network.
   41423 Eliminated duplicates for ATM/Debit/Credit cards that are sent in
- compromised card files using the compromise card program.
  45415 Update to only send Card Activation Flag to Coop for card
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## **Internal Modifications**

- 45129 Update to PACHTOT to only call the ACH total verification when ran from ROBOT and to display CU debit and credit totals if not ran from ROBOT.
- 45501 Update to expand device names for UDEVID.
- 45969 Update to program that includes credit cards for loan payment processing to Magic Wrighter to use the snapshot library.
- 45723 Upgraded MySQL and PHP to latest supported versions.
- 46057 When updating the 'More Info' text in the Database Search Assistant program, the new data is correctly saved.

### Program Modifications

• 45252 Eliminated error message from the member list generator view when running multiple items.

### Warranty Modification/Adjustment

- 46016 Adjusted It's Me 247 Desktop and Mobile Web clients to send the correct host when a member enrolls a mobile device for text banking.
- 45116 Update to prevent invalid HSA records from being created when Xtend Shared Branching is used.
- 42023 Eliminated error in payroll receiving.
- 43129 Update to the Teller Activity Screen to show correct name on miscellaneous receipts.

- 44431 Updated the credit card dashboard to count cards, loans, and members correctly.
- 45390 Update to created tracker notes to include the account suffix when dormancy is suspended or deleted.
- 45613 Eliminated program message from displaying when accessing Analysis on the Debt Screen in Loan Application.
- 45980 Modified the credentials API logic to allow stale members who have the CU reset their passwords to login when they're not part of an active promo.
- 46123 When running the option to post Payveris Bill Payments, the user is no longer able to post if they have exited the printer selection screen during the validation process.
- 45949 When maintaining sub accounts on more than one member, the 2<sup>nd</sup> membership entered now displays all subaccounts.
- 46221 Eliminated pointer error when taking tool 51 and entering an account number.
- 46245 Expanded the check number field length for processing accounts payable checks.
- 46149 Updated the Export of budget to contain the correct G/L account numbers.
- 46226 Updated the Charge Off option to allow the account number to carry over correctly to the final closing screen.
- 46232 Added a default for Branch 00 in the accounts payable workflow controls to eliminate a confusing edit.
- 46237 Added an edit to no longer allow symbols or punctuation in the purchase order field.
- 46293 Expanded the check number field length from 6 to 9 for processing accounts payable checks to avoid a system error.
- 46291 Updated the GL box to no longer disappear after entering an invalid GL in the investment screen.

# Enhancements

- 45402 Added the ability to break out participation loans from the Loan Portfolio Dashboard in Analytics Booth.
- 32390 Added ACH and approval functionality for Accounts Payable.
- 33097 Enhancement to the file maintenance data to allow better research and allow tracking of changes to critical data.
- 36555 Created a warning message on It's Me 247 for Reg D excess transactions.
- 37615 Added Dealer ID as a filter on the Loan Risk Score Analysis.
- 37724 Investment System Enhancements change to a dashboard

format, enhanced maintenance and added an investment payment process.

- 38640 Added the option to print copies of miscellaneous member account forms for additional signers/owners.
- 38269 Added the ability to change collector id's when adding a new client.
- 41288 Added a supplemental Vault Type of 'Other'.
- 41424 Created a tool that can create a compromised card file that credit unions can use to market to their members.
- 41491 Added the account security function to the direct mail process.
- 41971 Addition of more Smart Links for AP Invoices.
- 42028 Added the ability to create Promise Deposits in It's Me 247 Mobile Web.
- 42152 Changes to Credit Score in It's Me 247.
- 42518 Dashboard enhancements: Added a new analysis & filter tools to various dashboards.
- 42561 Added date opened range and multiple investor selection to the Participation Loan Analysis Report.
- 42569 Addition of configurable hold for Mail/Direct Deposit for RDC.
- 42633 Added the option to allow CU to move balance at the old rate when changing loan categories on credit cards.
- 42652 Dashboard enhancements Added a new analysis & filter tools to multiple dashboards.
- 42783 Added 'Post Negative Option' to ACH Exceptions Processing.
- 42849 Moved Co-Op online credit cards over to Phase II for their card status codes.
- 42938 Added report automation to the BSA/SAR Activity Report.
- 42968 Added the display of membership designation to the currently serving window.
- 43134 Addition of Same Day Corporate Check Reversals.
- 43165 Changed credit card maintenance to allow manual update of the credit card expiration dates.
- 43245 Created a view that combines data from MASTER and MEMBER 1-6.
- 43247 Created a view that combines data from MSHIST and ACHIST 1-6.
- 43379 Creation of Payveris dashboard.
- 43442 Created a web-based application of targeted tiered score analysis.
- 43697 Update to write maintenance updates to the CUFMNT table for the NSF/Overdraft Transfer Configuration.
- 43930 Changed the toggle options and added a search field for the

journal entry "Batch Label".

- 43943 Creation of operations dashboard.
- 44317 Added item count and duplicate percentage to IPAY Potential Duplicates screen.
- 44330 Wrap up code enhancements added ability to choose which employees are required to use wrap-up codes.
- 44434 Added the ability to look at custom fields from Closed account inquiry.
- 44454 Created new Login Widgets that bypass the OBC page.
- 44501 Creation of storage for Online Banking activity.
- 44697 Added a warning message when posting to a suspended branch.
- 44705 Added an option to allow a credit union to block a specific member from using any type of skip-pay program.
- 44715 Enhancement to the Participation Loan Trial Balance to include closed loans.
- 44810 Created a Library Dashboard for FILExxDW and QUERYxx.
- 44811 Created a Library Authority Management tool used to define date warehouse users at the credit union.
- 44818 Added the ability to add account nicknames when sub accounts are created in CU\*Base.
- 45175 Changed the Cross Sales button on the Verify Member pop-up window (Teller and Transfers) to conditionally switch the Pre-Approvals like it does in Phone/Inquiry.

# **GOLD Screen Modifications**

- 42040 Creation of theme-agnostic CU\*Base GOLD design for panels shared between editions (GOLD, Operator Edition, SE, etc.)
- 45260 Eliminated GOLD scripting error in GOLD OPER edition for Site-Four.
- 45730 Update to GOLD screens for OPER Edition RDC options.
- 45752 Update in GOLD to correct display of Escrow Payee Code.
- 45759 Corrected decimal place location in the Update Account Information tool when adding debt protection.
- 45915 Analytics Booth rebranded menu option and underlying program to Analytics Booth.
- 45973 Eliminated spelling error.
- 45982 Modified GOLD presentation of the TCR error screen so that it handles the URL presentation from the CFM's.
- 46010 Update to Tool 553 analysis to bring over 'average age' when the PDF option is taken.
- 46082 Update to GOLD panel for the Operation menu security

#### maintenance.

#### Web Modifications

- 38385 Update to Theme Name Process in Online Banking.
- 44686 Updated Business Name to display without spaces in It's Me 247.
- 45958 Modified how It's Me 247 creates check requests for Deluxe so that it uses our production web server IPs and no the member IP.
- 46118 It's Me 247 Loan App: Updated 'Your Loan' section to be more generic to handle credit applications where collateral is not required for unsecured loan types.

#### **Modifications**

- 42753 Update to Raddon Check Activity File to allow for more than 999 ACH transactions per member.
- 44836 Updated the check activity file sent to Raddon for expanding files and adding additional fields.
- 44888 Corrected the record written for Trackers logged on re-opened account bases to write on the active account rather than the closed account.
- 40811 Updated data upload for EFT summary dashboard to use the business date instead of the system date.
- 45374 Email addresses are now correctly saving when updating the SSN on Online Membership Applications.
- 45675 Updated posting from stand-in to use the system date for activity date.
- 45256 Added payment totals to the TCUNAS report.
- 45605 The "View All Accounts To Which This Member Has Access" is now filtering records bases on Master Type.
- 46029 Corrected the priority code within the Statement Flat File so Michigan Credit Unions are identified properly.
- 45955 Modified budget group change to add maintenance date.
- 32167 Added sales tax option for A2A fees.
- 34808 Update to ECOA codes available in CU\*Base to the Metro II reporting guide.
- 38563 Update to ensure that an IRA payout with withholding is properly posting for AFT payouts where the account balance is insufficient for the full payout amount.
- 40537 Enlarged fields for cash advance fees for credit cards are

handled when requested via self-service programs. • 43887 Added an unlock function and cancel function to loan maintenance. • 44231 Modified the member notice program to enhance the layout when multiple notices are generated for the same member but each notice does not have a co-signer. 44290 Update to restrict update ability to OTB accounts via inquiry. • 44504 Adjusted the Authentication API steps so Answering Security Questions is the second step. • 44576 Updated the parm list in all programs that use IBM 'Send' stored procedure. Update to blank forms list to display options on the 2nd column. 44899 Added table sections to allow updates to payer information • 44909 screen for ASCENSUS. • 44984 Removed 'Skip Card Order' function in the Authorized User List screen for new credit card orders. 45125 Eliminated conditional screen text issue in the Loan Category for Interest Only/Line of Credit. • 45187 Modified the warning message when creating a loan with the same suffix as one closed earlier in the same calendar year. • 45197 Eliminated program message when using toggle options in the new/closed/all accounts dashboard. 45372 Updated the OTB/Cards button in Phone Inquiry to use consistent color codes with inquiry. • 45568 Expanded the search feature on the home page to also look for tool numbers, shortcut names, and program calls. Updated custom field dollar and percentage inputs to work 45639 properly in GOLD. 45724 Added a printer selection to the Close Accounts and Close Memberships screens in Tool #22. • 45834 Added eDOCSignature updates to ProDOC. • 45874 Updated variable lengths to match between online banking programs so that message center sequence numbers don't get corrupted when writing message center notifications. 45958 Modified how It's Me 247 creates check requests for Deluxe so that it uses the correct production web service IPs. • 45703 Updated the G/L Purge program to correctly purge records with a Post Century not equal to '20'. • 45792 Modified FICOR (SWBC) receive program to no longer bypass any error and correct creation of CPISBRCV file.