December 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 December.

EFT Modifications

- 45307   Corrected CO-OP Closed card status records from being sent in the card maint file for Debit and Credit status changes.
- 46410   Added two new incoming status codes related to suspected fraud CO-OP clients.
- 42484   Update to capture and write the NETWORK ID for ATM/Debit/Credit online messages from FIS.
- 45059   Update to require credit card emboss names to include caret name separators for individual accounts.
- 45419   Updated the ATM Debit Card Maintenance to allow the first name to be 14 characters long.

Internal Modifications

- 46079   Updated the CTE Create/Refresh process to delete CTR libraries vs. clear to reduce replications load and improve replication speed.
- 46587   Beginning of year reports now route correctly to the QUERYxx/NIGHTxx outq as they are running in Robot as part of EDBD.

Warranty Modification/Adjustment

- 45853   Days/Months Option correctly appears when configuring CU Defined Transfer Frequency Codes and specifying Days vs Months.
- 46249   When joint owner notices are generated, they are now correctly coded with page 1 for the print vendor.
- 46327   Updated the multiple selection in the investment activity report to allow selection of more than 100 investment IDs.
- 46179   Updated new account creation to display Custom Fields properly in the workflow.
- 46579   Corrected field name in CTR program and corrected format for

- cash in/out fields for individual accounts.
- 46583   Modified the indirect lending process to have a new call to credit score history program in order to prevent persistent file locks.
- 46555   Update to allow only collateral records with collateral types defined as Real Estate to be used for Form 1098 data.
- 46571   Updated the G/L Purge program to correctly retain the 'Resulting Balance' from the last GLBALA record purged in order for the Journal History Inquiry to perform correctly.
- 45463   Update to nav database maintenance – when assigning a custom tool to a CUID, it is no longer deleting records if there isn't a matching CUID.
- 46381   When creating a CFT, the expired alternate address is no longer displayed in the address field.
- 46420   Updated account payable paid history report to retrieve results when a 4-digit vendor number is selected.
- 46208   Updated transaction type to write multiple selections on the CTR file when appropriate.
- 46407   Eliminated program message when writing off a loan.
- 46468   Modified CUFMAINT records to correctly display negative values and eliminated duplicate records when adding an investment.
- 46659   Corrected budget issues when there are multiple CORPIDs or multiple GL selections.
- 46719   When updating the investment work file, the credit portion of the J/E entry now writes properly with the changes.

Enhancements

- 41205   Expanded the date captured in CU*Base from integrated partners.
- 43273   Created a view that combines dividend application configuration fields from SYSCTL.
- 43324   Added new table for stand-in programs to eliminate file locks that occur occasionally during the end Stand-In Jobs.
- 44315   Enhancements and corrections to the Tax File Comparison Dashboard.
- 44986   Enhanced programs that update HSA and IRA limits at beginning of year.
- 45495   Updated budget software to allow asset/liability projections for Non-CU*Base Products.
- 45587   Added "Last 10 Accounts" lookup to Tool #919 - Update Uncollected Funds Information.
- 45591   IRA and HSA Contribution Limit Enhancement – populate catch-

up contribution limits during BOY processing based on member age.

- 45600   Enhancement to incorporate the information for tax verification now done by query into the tax dashboard.
- 45828   Created programs for resend of Kasasa Files Similar to Resend of Bancvue files.
- 45863   Added Print Envelope feature to Closed Member inquiry screen.

Modifications

- 43432   Modified the AFT logic to not take AFT payments early when running skipped days for credit unions running AFT at end-of-day.
- 45350   Update to not include zero in work ext. phone # for online membership opening (MOP).
- 45388   Updated tables COMMLN and COMMNT to add a line sequence number.
- 45423   Added "shared branching field (Y/N)" and a few verbiage changes to the CTR Form input screen to allow for future requirements.
- 45559   Added option to 'Include written-off loans' to Relationship Analysis Dashboard.
- 45599   Added entries to Smart Operator for Data Center Tax Processing.
- 45731   Change to debt protection to handle members over 999 days delinquent properly.
- 45882   Adjusted the toggle on the 'Package Loans to be Sold' Dashboard to also display the Open Date for the loan account.
- 46107   Modified the loan delivery channel and credit pull type tables to support the future Experian decision model and credit pull project.
- 46150   Updated generic RegV Price You Pay for Credit Forms for all FICO Models.
- 46165   Added the Escrow payment amount to the Magic Writer Loan Xpress file.
- 46275   Modified the wrap up table in end-of-day to reduce run time.
- 46437   Added changes to the DIVAPL screen in preparation of allowing a link for qualified dividends to share products.
- 46210   Added the total for loan payments on the TCUNAD reports.
- 45070   Employees are no longer able to view credit reports if not authorized to do so.
- 45850   Update to allow deletion of a start date in employee profile

- maintenance.
- 45347   Added an edit to prevent a loan product to be deleted if there is an application attached to it.
- 46185   Update to prevent EOD process to eliminate potential error with file naming.
- 46576   Eliminated lock on the MEMBERx file while performing an Auto Funds Transfer.
- 45475   Changed the amortization program to handle zero values in the total payments and number of payments left fields in the MEMBER record.
- 46276   "Block from skip-pay programs" is now defaulting in as 'N' when creating a membership from indirect loans.
- 46656   Corrected Date format for Indirect Loans Auto Approval.
- 46422   Updated CUFMAINT Inquiry to allow for more than 12 retained monthend files.
- 46517   Updated the Amount Paid Year to Date field in the Accounts Payable Vendor Maintenance to display consistently.

GOLD Modifications

- 46334   Added field over screen ID for help presentation.
- 46359   Eliminated error message in Tool 759.
- 46377   Removed charts from GOLD Panels & PDF Exports.
- 46444   Updated the warning message text on GOLD Panel 2746 regarding Club Processing from MNCNFA – Opt 6, to Tool #238.
- 46523   Corrected Dashboard exports in Tiered Services (only demographics view).
- 46526   Modified Audio/PC Banking Processing within Loan Category Definition to accommodate Interest Calc Type 360/Post.
- 46528   Date Fields for Unique Data Management are displaying correctly in GOLD.
- 46539   Added Use Contact for IRS to Accounting Misc Tab.

Architectural Change

- 45705   New Configuration Maintenance Tool for DEX.

Updates for Self-Processors

- 40592   Changed Site-Four TNB OTB from manual PC SFTP to standard GOAnywhere like CU*Answers.

Web Modifications

- 46332   It's Me 247 Desktop: Updated iPay SSO hand off in It's Me 247
- 46333   It's Me 247 Desktop: Update to display transaction history for OTB loans.
- 46347   It's Me 247 Desktop: Update to remove standard desktop link when bypassing OBC is enabled.
- 46348   It's Me 247 Desktop: Created a new error/timeout page for SSO billpay when bypassing OBC is enabled.
- 46408   It's Me 247 Desktop: Removed hyperlinked account references in header of messages from the message center.
- 46537   It's Me 247 Desktop: Update to change the way Payveris API calls are made when a member is not yet enrolled.
- 46647   It's Me 247 Desktop: Modification to Smart Messages and gallery images to prevent improper redirect error.
- 46727   It's My Biz adjustment to correct user agreement process.