

Product:	Version #:	To be released to:	On date:
CU*BASE® GOLD	17.03	Online CUs	March 19, 2017
		Site-Four	March 19, 2017
		Self-Processors	March 20-21, 2017





Updated booklets will be posted on our website no later than:

May 17, 2017























This release includes changes to key database tables (files). **You must update your automated Queries** prior to their next scheduled run date!

See the separate Database Changes announcement for instructions.

Key to the symbols:

-  You'll see it immediately
-  You'll need to activate it
-  You'll need to work with a CSR to set it up
-  There may be related fees; contact a CSR

INCLUDED IN THIS RELEASE

All Employees – New Home Page	2
 A New Day-to-Day Experience for CU*BASE Users and Much More!	2
 The CU*BASE Home Page - Designed for the “Search Generation”	3
 A Personalized Experience Based on Your Employee ID	4
 View Only Tools Assigned to You or Dig In to Change the Tools You See	4
 Activate ProDOC Launch and Auto Security on the “Preferences” Screen	5
 Permanent Tool Numbers That Never Change – Even with a New Release	5
 “It’s Me” Approach Lets You Create Your Own Personalized Tool Listing	5
 Learn More About the Tools Right From the Home Page	6
 Transition Materials Available in the Kitchen and Online Help	6
Security/Auditing	7
 Easier Management of Employee Security	7
 Streamlined Employee Security Screens with Many New Features	8
 Easily Assign Tools with the Employee Security Dashboard	9
 See Which Employees Are Assigned to a Tool (And How Many Employees)	9
 Audit Your Tool Assignments at 17.03 Release Implementation	10
 New On Demand Report for Auditing Your Security Settings	10
 Understanding the Changes to Auto Security	11
 New Job Classification Feature	11
 Audit Link Can Assist You with Your Security Audit	12
Additional Account Security Added	12
 Account Security Added to More Tools	12
Sunset of a Few Outdated Features	13
 Good-bye to WMail and WCalendar...and others	13
Self Processor Credit Unions	13
 Accessing the Operations Edition from the New Home Page	13
 New Method to Assign Operations Commands to Employees	13

All Employees – New Home Page

✓ A New Day-to-Day Experience for CU*BASE Users and Much More!

The 17.03 release represents more than a pretty new home screen. Under the hood is a completely new infrastructure on which the network can build for years to come.

Beyond that we looked deep to provide a great user experience. The new CU*BASE navigation mimics trends in the marketplace: the Google generation where searching is the norm and the “it’s me” public, that desires a customized experience set up the way they like it.

When evaluating the delivery of the new “tools” instead of “options/menu” experience, we researched better ways to assist both front-end users and employees concerned with the increasing emphasis on auditing and security.



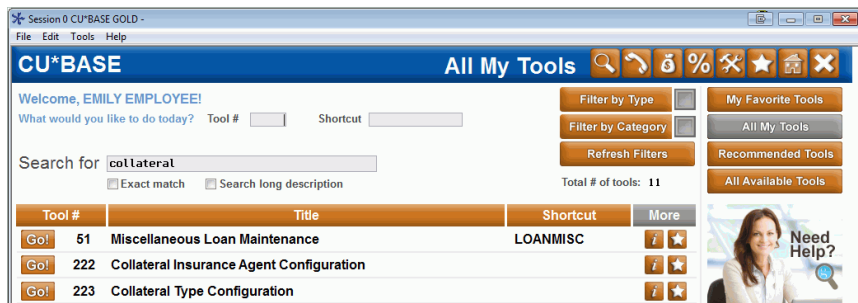
- While analyzing the over 1,000 tools in our system *we researched the top fifty most frequently-used options and made them the first fifty tools on the list.*
- These tools *never change tool number*, significantly assisting security officers with the implementation of new releases and for reference in release summaries and to keep our doc up to date.
- The design of the home page allows you to sort your list the way you like and *even to set up favorites with your own number*, the way you like them.
- *We've added 90 new shortcuts on day one!* Access to the tool means access to the shortcut. Now there are shortcuts for “stop” (stop check payment), “skip” (skip a payment on a consumer loan) and “loanq” to access the loan queue, often referenced as MNLOAN #8.
- The learning curve for new users will be faster *in a way that is designed for both keyboard and mouse users*. Employees can see only the tools they use, or they can dig deeper to see ones to which they don’t have access.
- There are all kinds of cool new tools for data analysis and auditors too, *including embedded tools explaining program names.*

Once you select a tool and leave the new **Home Page**, *your experience will be the same as it is today.* For example, **Tool #1: Teller Line Posting** (Shortcut: teller) still takes you directly to the Teller Processing screen where you enter the account number to which you want to post a transaction.


✓ The CU*BASE Home Page - Designed for the “Search Generation”

Learn more: [online help](#).

With the 17.03 release the CU*BASE menu-driven navigation system is being replaced by the new **Home Page**. From this entry screen you will find a *faster and more intuitive search engine*, and a shorter learning curve for new users. Search by tool number, shortcut, and by the tool description (partial or full wording). All the search and filter features are there – right when you log into CU*BASE.



This search mechanism is not exactly like the popularity-based Google search, but rather a more consistent tool with hard-coded key words to assist you with finding just what you need.

- Enter a tool number in the **Tool #** field to go directly to that tool.
- Enter a word or word phrase in the **Search for** field. If you need to dig down deeper, use the **Exact match** to find the words in the exact order you type them, or use the **Search long description** to search a longer description that is also found by using the **Information** button .

In the example above you can see how the search term “collateral” returns **Tool 51: Miscellaneous Loan Maintenance** (Shortcut: loanmisc), the tool used to edit collateral records on a loan, even though that word “collateral” is not found in the tool name.)

We’ve also the short report names of many on demand CU*BASE reports to the Search keywords. Enter a short report name (such as LAUDT1 or FLMLOG) in the Search field to view the tool that generates that report!


Let us know if you have trouble getting a search to work as we can add keywords easily!

- The **Shortcut** field allows you to enter not only shortcuts, but current short menu names as well, *so enter MNSERV in this field to find all the options on the current Member Service menu.*

We have taken this release as a good time to update the old COMENT shortcut to the new COMMENT and the old TRAKR shortcut to the new TRACKERS. As noted before, be sure to check out the 90 new shortcuts, including “stop,” “skip,” and “loanq”).

- Filter by **Type** and **Category** to hone down your search further.

Filter by “Reports” in Type and “G/L” in “Category” to find only the General Ledger reports. (Category is our new way of grouping similar tools, for example, now use the new Auditing category to find tools currently on the Auditing Functions 1 (MNAUDT) and Auditing Functions 2 (MNAUD2) menus.)

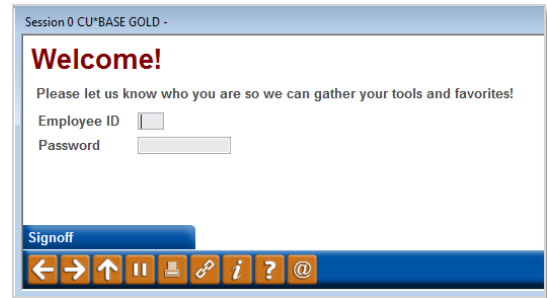
- Credit union custom tools will be listed alongside all of the tools. To see only your credit union custom tools, use the **Custom** button . Then click the button again to toggle back to view all your tools.

✓ A Personalized Experience Based on Your Employee ID

Learn more: [online help](#).

Every time you log on to CU*BASE, you will be presented with a new **Welcome** window. This is so CU*BASE knows who is using the workstation and can personalize your experience just for your access privileges and favorite settings.

Enter your Employee ID and password, and the **Home Page** will default to show only tools you to which you have access.
(More on seeing all the tools in a moment).



With the implementation of the 17.03 release *your personalized settings (whether ProDOC launches when you access CU*BASE, whether auto security is activated, and even your color theme selection) are tied to your employee ID.*

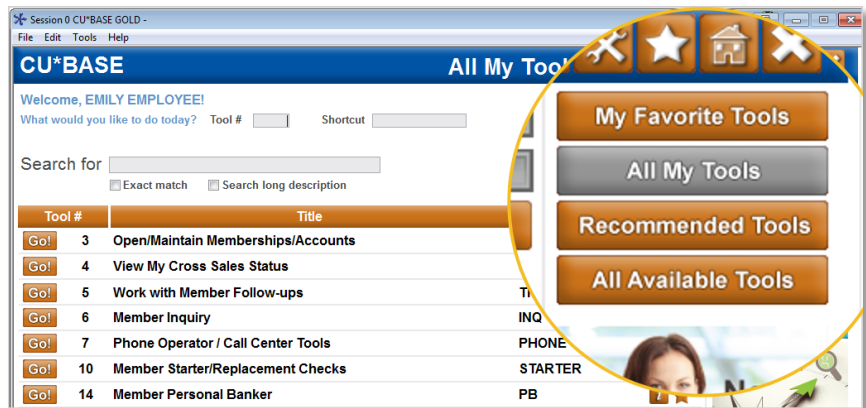
This means that CU*BASE session will look the same every time you log in, regardless of the computer you use!

✓ View Only Tools Assigned to You or Dig In to Change the Tools You See

Learn more: [online help](#).

The tools listed on your Home Page will change based on the button you select in the upper right hand side of the screen.

- Want to see your custom list of tools? Select **My Favorite Tools**. *(Read more about how you can make your own list and how you can even make this your default setting in just a minute!)*
- Interested in seeing just the tools you have access to? Make sure that **All My Tools** is selected. *This is the default at your first login and is shown in this example.)*



- The **Recommended Tools** feature gives you suggestions on what tools you might want to use based on your job description. *(There is more about setting up this feature in the security section of this document.)*
- Interested in learning more? Select **All Available Tools** to see a list all tools available (minus a few we use for maintenance of the system). If the tool name is shaded grey, this means the tool is not assigned to you.

Not seeing a tool you expect to see in your listing? Check the buttons covered in this section. You may just be looking at the wrong toolset!

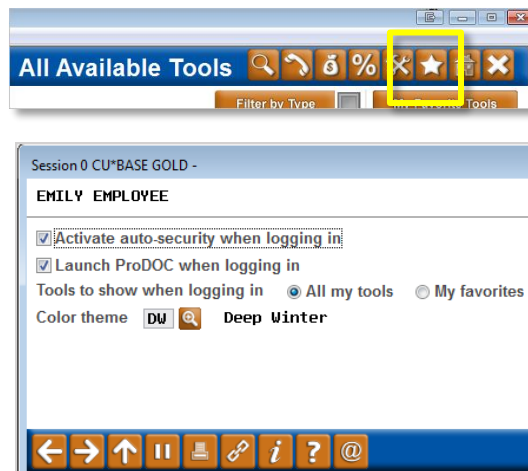
✓ Activate ProDOC Launch and Auto Security on the “Preferences” Screen

Learn more: [online help](#).

At implementation of the 17.03 release you will need to activate the settings for ProDOC and auto security to launch at login. No preferences will be converted to the new system.

To access the **Preferences** screen, click the large orange **Preferences** star in the top bar of the CU*BASE Home Page (as shown above).

In the sample **Preferences** screen shown to the right we have activated auto security and ProDOC to launch at login. With this setting after you enter your employee ID on the **Welcome** window, the auto security window will appear asking you to reenter your employee ID and password. *(More details on auto security in the Security section of this document.)* We have also selected the “Deep Winter” theme for a different CU*BASE coloring.



Remember, these settings are attached to your employee ID so these selections will follow you wherever you go so regardless of the computer you log into, your CU*BASE experience will be the same.

✓ Permanent Tool Numbers That Never Change – Even with a New Release

Learn more: [online help](#).

Security officers and documentation writers (and readers) will be excited that original tool numbers will never change. Once documentation is written, it will keep the same number. Once an employee is assigned a tool, it will always stay the same tool number. When new tools are added, they will simply be given a number not in use.

Tools #1-100 were numbered based on frequency of use. When we analyzed five of our busiest credit unions, the top 50 list came out pretty much the same! After the top fifty, the remaining tools were ordered more or less alphabetically by description, but are essentially randomly assigned and will not follow any pattern in the future. The important thing to remember is that the numbers will never change, even as we change our software in the future.

✓ “It’s Me” Approach Lets You Create Your Own Personalized Tool Listing

Learn more: [online help](#).

The new navigation lets you select your favorite tools and make your own custom listing.

- Interested in having your tools listed in a specific order?
- Want to make a short list of the tools you use most frequently?
- Think it would be handy to assign your own number that is easier to remember to a tool you use frequently?



The **My Favorite Tools** version of the Home Page is designed with you in mind!


To make a tool a favorite click the Star icon to the right of the tool. A window will appear allowing you to give it your own tool number. To see your customized tool list, click on the **My Favorite Tools** button.

When viewing the **My Favorite Tools** toolset on the **Home Page**, the label “My #” is used, since this is your own tool number. If you are viewing a different toolset (for example **All My Tools**), the star next to the tool will be colored, to indicate you have selected it as a favorite.

While you are on your **Preferences** screen, you can even set the “My Favorite Tools” view to be your default when you login!

✓ Learn More About the Tools Right From the Home Page

Learn more: [online help](#).

On the Home Page you can click on the Information button  next to any tool to learn more about it on the **About this Tool** screen (shown below). This can be especially handy if you don't have access to a tool yet but want to learn more about it.

The **About This Tool** screen includes a short description of the tool, the permanent tool number, and much, much more. Be sure to check out this handy resource!

Additionally the large graphics on the Home Page (shown surrounded in a yellow box) will give you access to an introductory video and additional training materials. Be sure to the **Need Help?** and **Navigating the home page** buttons for assistance once you log in!

✓ Transition Materials Available in the Kitchen and Online Help

Interested in some additional assistance with the transition? Check out the Kitchen page devoted to the new CU*BASE navigation <https://www.cuanswers.com/resources/kitchen/revamping-the-cubase-menu-system/> and look in the **Cross Reference Tools** and **Other Reference Materials** sections. There you will find:

- **Cross Reference Guide: Old Menu to New Tool #**, which provides an Excel spreadsheet cross reference of old menu/option #/description to new tool number/description.
- **Online Help Topic: Old CU*BASE Menus** topic, which shows pictures of 58 of the more popular menus. (Also find this help topic by searching for “menu” in the CU*BASE Online Help.) Access this directly at http://help.cubase.org/cubase/cubase.htm#CUBASE_Menu_List.htm
- **Cross Reference Guide: MNXXXX to Category**, which also provides pictures of the menus with explanations of the categories their options are now grouped by. Access this directly at https://www.cuanswers.com/wp-content/uploads/Cross-Ref_MNXXXXtoCategory.pdf
- **Brochure introducing key features on the new Home Page** – handy reference guide for the first week of the implementation. Access directly at https://www.cuanswers.com/wp-content/uploads/cubase_newnav.pdf



Security/Auditing

There is one group that won't need much cheerleading. Your security officers will definitely appreciate many new enhancements we have made to security features in CU*BASE, conversion reports, and so much more!

✓ Easier Management of Employee Security

Learn more: [online help](#).

10/27/16 14:09:28 CREDIT UNION LEMPAU10 PAGE 3
 RUN ON 10/27/16 EMPLOYEE SECURITY AUDIT REPORT USER DAWNM
 AS OF 10/27/16

*** MENU SECURITY - MNGELE General Ledger

EMP MENU OPTIONS Y = ENABLED, BLANK = ENABLED, N = NOT AUTHORIZED, * = NOT A MENU OPTION

ID	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29
AA AUDI	N	N	*	N	N	N	N	N	N	Y	N	N	N	*	*	N	N	N	N	N	*	*	*	*	*	*	*	*	*
AB ANDf	Y	N	*	N	N	N	N	N	N	N	N	N	*	*	N	N	N	N	N	N	*	*	N	N	*	*	*	*	*
AE AMF	Y	N	*	N	N	N	N	N	N	N	N	N	*	*	N	N	N	N	N	N	*	*	*	*	*	*	*	*	*
AF AMY	Y	N	*	N	N	N	N	N	N	Y	N	N	N	*	*	N	N	N	N	N	*	*	*	*	*	*	*	*	*
AG AMA	Y	N	*	N	N	N	N	N	N	N	N	N	*	*	N	N	N	N	N	N	*	*	*	*	*	*	*	*	*
AH AN	N	N	*	N	N	N	N	N	N	N	N	N	*	*	N	N	N	N	N	N	*	*	*	*	*	*	*	*	*

VS.

The first thing that your security officers will cheer about is the sunset of the employee security report with cryptic Ys and Ns (shown above) and the introduction of a new interactive dashboard (shown below).

Other things big ticket items to cheer include:

- Releases will no longer change anyone's security settings – as noted earlier *tool #s and tool assignments are now permanent!*
- A “_NEWTOOLS” category will make it a breeze to see only the tools added in the most recent release.
- Currently if a new option is assigned to a menu and the employee has access to a menu option, they are granted access to the new option. This goes away with the 17.03 release and employees will only get access to a tool if it is assigned.

Session 0 CU*BASE GOLD -

File Edit Tools Help

Assign Tools to Employees

All Available Tools

For all employees # employees 239 A highlighted row indicates a custom program

Search for Exact ☐ Description ☐ Tool #

Categories Types

Tool Description	View Only	Categories	# Employees
Abnormal Activity Monitoring Config		CONFIGS	7
Account Balance Analysis Report		REPORTS, MARKETING, CASH	40
Account Retention by Age Group		KNOWMR, ANALYSIS	4
Account Retention by Year Opened		KNOWMR, ANALYSIS	4
Account Suffix Configuration		CONFIGS	5
Accounts Payable Vendor Inquiry	Y	AP, REVIEW	7
Accrue Interest for 360 Partic. Loans		PART	6
Accrued Dividend Summary Rpt - CDs		REPORTS, GL, TAX	10
ACH Fed Transmission Summary Inq (ACHSM)		ACH, CANNEDORY	17
ACH Member Inquiry		ACH, MBRING	146
ACH Posting Controls Config		CONFIGS	5
ADB Calculator (Savings & Loans)		ANALYSIS, BUDGETING	3
Add Manual ACH File to Warehouse		ACH	6
Add-on Additional Funds to Student Loan		STUDENTLNS	13
Adjust Teller Drawer/Audit Keys		ACCTADJ	37
Age Distribution Analysis Report		REPORTS, MARKETING, MBRING	40
AIRIS - Create Files		AIRIS	7
AIRIS - Delete Files		AIRIS	7
AIRIS - Print File List		AIRIS	6

Assign to Employee About This Tool Show Assigned Employees

Show Assigned

Print

After making changes to an employee's Job Classification or Tool Assignments, instruct the employee to log off and back on again. This will ensure that the employee's home page display will correctly reflect the underlying security settings.

TR (616) 2/21/17

But that is far from all that your security officers will cheer about with this release. Turn the page for more exciting employee security enhancements.

✓ Streamlined Employee Security Screens with Many New Features

Learn more: [online help](#).

Before looking at the new things with 17.03, let's first look at how we have made the existing tools even better. First stop is the current **Employee Security** option on the Management/Active Beta Tests menu, now **Tool #327: CU*BASE Employee Security** (Shortcut: security).

At first glance you can see we have added quite a few new features to both the entry **Employee Security Maintenance** and **Employee Profile** screens.

On the entry **Employee Security Maintenance** screen:

- See all your comments and notes at a glance
- Search for employee IDs by name
- Jump to an ID in the list
- Sort your list the way you like (using asterisks in end dates makes it easy to sort by this information)
- Assign many tools to a single employee/Assign many employees to the same tool (more on that on the next page)
- View the primary vault (a plus sign indicates that additional vaults are assigned)

ID	Name	Job Class	Team	Teller	Comments	Primary Vault	Start Date
AA TE		TELLER	AU	V		01	
AB AN		COLLECT	TL	V		01	Dec 15, 2014
AD AU		LENDER	LN	V		01	
AE EM		TELLER	TL	V		01	Jun 02, 2015
AF AN		TELLER	TL	V		01	Jun 02, 2016
AG AN		ASSTNGR		V	**END DATE 01/15/2017**	01	Jan 01, 2001
AH AN		TELLER	TL	V		01	Sep 03, 2013
AL AS		CALLCENTER	VL	V	**END DATE 12/15/2015**	01	Nov 02, 2015
AO AN		TELLER	TL	V		01	Aug 27, 2013
AR AN		TELLER	TL	V		01	Jul 01, 2013
AS AL		TELLER	TL	V	**ON TEMP LEAVE**	23	Aug 01, 2014
AW AN		TELLER	TL	V		01	May 13, 2015
AI AN		MARKETING	NK	V		01	Jan 04, 2016
BA BA		TELLER	TL	V		05	
BB BR						01	
BC BL						23	
BE BE						04	Aug 01, 2014
BG BE							

The **Employee Security Maintenance** screen even refreshes without your needing to exit and re-enter it!

New features on the **Employee Profile** screen include:

- Record all employee start dates; then sort the entry list (shown above) by this date.
- As before, the **Team** feature (formerly called Job Category) still lets you create templates and copy settings from one ID to another.
- Record the NMLSR# for all employees – ready for your next custom form updates! (NOTE: NMLSR# won't appear on forms until you make a change to your form and we re-program it.)
- There is even a space for the employee email addresses for use with future CU*BASE tools (watch for the first enhancement coming in a future release).

Introducing a New Feature: Job Classifications

This will allow us to make recommendations to security officers about which tools should be assigned, based on job responsibilities (*more on these in a moment...*)

✓ Easily Assign Tools with the Employee Security Dashboard

Learn more: [Employee Security booklet](#) and [online help](#).

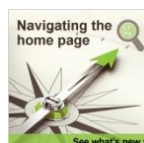
From the new **Employee Security Dashboard** (shown to the right), you can easily assign tools to one employee. Now it is very easy to adjust your Teller templates or to add new tool to an employee who just took on new responsibilities! Filtering and sorting allow you to easily find just the tool you want to assign.

Now when you assign a tool to an employee, they automatically get access to the shortcut as well!

Tools to Learn More!

After you log into CU*BASE be sure to click the **Navigating the home page** button on the **Home Page** for the following step by step directions:

- Assign a tool or multiple tools to an employee
- Assign a tool to multiple employees
- Remove a tool assigned to an employee
- View tools assigned to an employee



✓ See Which Employees Are Assigned to a Tool (And How Many Employees)

Learn more: [online help](#).

These two new features are ones we are sure you will appreciate.

Now right from the **Employee Security Dashboard** (see above) you can find out all employees who have access to a particular tool. This will be very helpful in assisting you with proofing your work when adding a new tool to a group of members or to research which employees have access to a tool. Just select the tool and then **Show Assigned Employees** and a window will appear with a list!

You might find you have employees with access to full account adjustment when coded account adjustment will do, for example. With this new dashboard it is very easy to make a change to access permissions. Directions will be supplied at release. (See note above.)

Interested in the total *number of employees* who have access to a tool? Check out the **Employee Security Dashboard** for this information as well. Find this analysis in the **# Employees** column. (See above for an example.)

Audit Your Tool Assignments at 17.03 Release Implementation

Before the implementation of the release, we recommend you run your employee security reports as a record of the permissions granted to your employees. On the day of the release, we will place an Employee Security Conversion Report in your **HOLDxx output queue**. All existing permissions will be translated to the new structure for you to review. Use this with the new Employee Security Dashboard and on demand report to more easily review your employee security and to find out who has access to which tool. You may find a few that you want to adjust.

1 2 3 4 5 6 7 8 9 10 11 12 13												
1/04/17 9:56:27 UPDATE						CREDIT UNION				PAGE		
Run On 1/04/17						EMPLOYEE SECURITY CONVERSION REPORT				CNV37579ES USER BRENDAB		
OLD Menu: MNACCK		Option#: 01		Program: URAPOPCL		OLD Desc: Work With Outstanding Invoices				Parm: NEW TOOL #: 998		
Assigned to: Employee ID		Name				NEW Desc: Work With Outstanding Invoices						
JF		JEF										
05		DON										
16		GRE										
19		KAR										
37		LIS										
89		CU*										
9H		XTE										
92		CU*										
OLD Menu: MNACCK		Option#: 02		Program: PAPSEFNC		OLD Desc: Select Invoices For Payment				Parm: NEW TOOL #: 787		
Assigned to: Employee ID		Name				NEW Desc: Select Invoices For Payment						
JF		JEF										
NA		BRA										
05		DON										
16		GRE										
19		KAR										

If you want your conversion report routed to CU*Spy, you can move it to MONTHxx or another OUTQ that is archived.

 New On Demand Report for Auditing Your Security Settings

Learn more: [online help](#).

In addition to the new Employee Security Dashboard, you will now have a new **Assigned Tools Audit Report** which is replacing the menu security report. Access this on demand report by selecting **Tool #357: Employee Security Audit Report**, currently **Employee Security Reports** on the Audition Functions 2 (MNAUD2) menu. With the redesign there are no more Ys and Ns!

2/10/17 15:44:38 RELEASE CONTROL CREDIT UNION LEMPAU01 PAGE

Run On 2/10/17 ASSIGNED TOOLS AUDIT REPORT USER

Tool

Number	Title	Shortcut
1	Teller Line Posting	TELLER
	Employee ID Name Job Classification	
	05 DE	
	16 GI	
	89 CI	
	92 CI	ASSTNGR
	DM DI	HEADTELLER
	RG RI	ASSTNGR
2	Work/View Loan Application Status	LORNO
	Employee ID Name Job Classification	
	RG RI	TELLER
	RO RI	TELLER
	RR RI	TELLER
	BB BI	TELLER
	BE BI	

Session 0 CU*BASE GOLD Edition - Security Audit Reports

Report Options Response

Security audit report

Employee security audit report

Employee security audit report

Assigned tools audit report

Employee security maintenance report


✓ Understanding the Changes to Auto Security

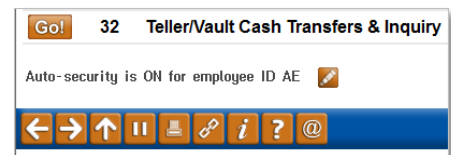
Learn more: [online help](#).

Remember that regardless of whether auto security is activated or not, CU*BASE still checks against access privileges to be sure you have access to a tool when you select it. When auto security is activated, it simply does not require you to enter your employee ID and password each time you select a tool.

At implementation of the 17.03 release, your employee ID will controls what tools you see on the home page and your preferences, not just security access. If you then activate auto security by entering your employee ID and password on the **Auto Security** screen, you will not have to enter your employee ID and password each time you access an option to which you have permission granted.

As mentioned earlier in this document, you can elect to launch the auto security screen each time you login by setting it as your preference on the **Preferences** screen. If auto security is not activated, you will need to enter your employee ID and password each time you access a tool.

With 17.03 release your **Home Page** will now indicate of the status of auto security. If the **Auto Security** window does not automatically launch when you log in (for example the first time you log in) you can launch the window with the edit button . This feature also allows you to turn off auto security which can be helpful, for example, when there are multiple people using the same workstation.



Remember that Teller Posting also has workstation security and can be set up in your Workflow Controls to require a second entry of employee ID and password every time the feature is used. Also remember that regardless of whether you use Auto Security or not, the tool list on the Home Page will still display according to the employee ID of the person who initially logged in. If users share a workstation, unless their access privileges are identical this could cause confusion as to which tools are shown as accessible and which are not on the Home Page.

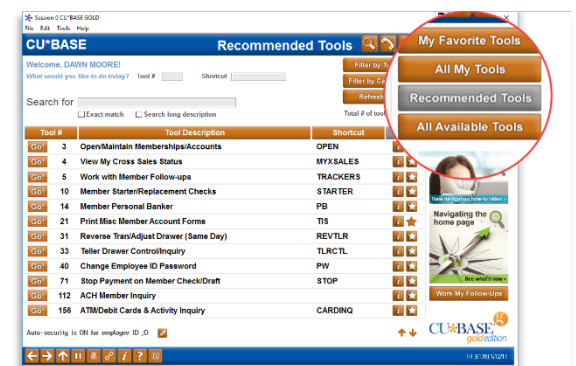
Beginning with the 17.03 release, all employees will be able to activate auto-security unless you deactivate it (for *everyone*) in CU*BASE Employee Security. Refer to the “Auto Security” topic in CU*BASE Online Help for more information.

✓ New Job Classification Feature

Learn more: [online help](#).

On the Home Page the **Recommended Tools** toolset button lets users see how their access privileges match up to the access recommended by our AuditLink security consultants. There is also a similar feature to compared recommended tools to an employee’s actual tool assignments in the CU*BASE Employee Security feature already described.

This feature is completely optional. In order for these recommendations to be visible, your security officers must first assign one of the standard job classification codes to each employee profile. This can be done on the **Employee Profile** screen accessed via **Tool #327: CU*BASE Employee Security** (Shortcut: security). Until this is done, employees who click the Recommended Tools button will see no tools listed.



The Job Classification feature is just the first phase of what we hope will become a powerful feature for helping you audit and adjust your security policies based on job responsibilities. The first step is getting employees assigned to the classifications, then we can start inventing more features that will use these recommendations in new ways. We welcome your feedback and ideas about how this feature should evolve!

Audit Link Can Assist You with Your Security Audit

One of the most painstaking tasks a security officer performs is the review of all employee access points to the CU*BASE platform. In many cases it is just an issue of finding the dedicated time to sit down and review every menu option each employee has been granted and adjust according to job description, risk, and segregation of duty. AuditLink can help. AuditLink has performed reviews for credit unions for over 5 years and can help you systematically review, evaluate, and update your security with a constant theme of risk mitigation and employee efficiency. Depending upon the size of the credit union these sessions last between four and eight hours. No travel is required as they are completed via web conference.



Visit AuditLink online at: www.auditlinksuite.com to learn more about their offered products and services, or call 800-327-3478 and ask to speak with an AuditLink Advisor today!

Additional Account Security Added

Account Security Added to More Tools

Learn more: [online help](#).

Account security is an existing employee security feature that controls whether an employee can do maintenance, inquiry, or post to special accounts, such as employee accounts. With this release we are adding the following 23 tools to account security.

These new tools include options that currently exist on the **Update Functions 1** menu (MNUPDT), **Update Functions 2** (MNUPDA), and the transaction reversal and transaction override options on the **Member Account Adjustment Tools** (MNADJ) menu. (For your reference, the following tables includes both the current menu/option number and the corresponding new tool number.)

For a current overview of Insider/Employee Type codes, refer to the following CU*BASE Online Help topic: <http://help.cubase.org/cubase/cubase.htm#EmpTypeCodesOverview.htm>

The following tools follow the “Allow Posting” setting.

Member Account Adjustment Tools (MNADJ)

Option #	Option Name	New Tool #	New Title
13	Transaction Reversal	869	Transaction Reversal
19	Perform Transaction Override	585	Perform Transaction Override

The following tools follow the “Allow Maintenance” setting.

Update Functions 1 (MNUPDT)

Option #	Option Name	New Tool #	New Title
4	Update Auto Transfer Information	884	Update Auto Transfer Information
5	Update Payroll Information	995	Work With Member Payroll Detail
6	Update Member ACH/Company Infor.	989	Work With ACH Members/Companies
9	Update Misc. Loan Information	51	Miscellaneous Loan Maintenance
10	Update Misc. Secured Funds Infor	903	Update Misc. Secured Funds Information
12	Update Overdraft Protection	908	Update Overdraft Protection
13	Update ARU/Online Bank Transfers	883	Update ARU/Online Banking Transfer Ctrl
14	Update Email Addresses	890	Update Email Addresses
16	Update IRA/HSA Trans Post Codes	918	Update Trans Desc & IRA/HSA Post Codes
17	Update IRA Balance Information	896	Update IRA Balance Information

18	Update IRS Tax Information	899	Update IRS Tax Information
19	Update IRA Beneficiary Info	897	Update IRA Beneficiary Information
20	Update IRA Payout Information	898	Update IRA Payout Information
22	Update Savings Bond Information	913	Update Savings Bond Information
23	Update Member Comments	70	Enter General Member Comments/Messages
27	Update Mortgage Stmt History	904	Update Mortgage Statement History

Update Functions 2 (MNUPDA)

Option #	Option Name	New Tool #	New Title
1	Update Closed Membership Infor.	888	Update Closed Membership Information
4	Update Mbrship/Acct Reason Codes	902	Update Membership/Account Reason Codes
9	Update Dormancy	985	Work Dormant Members
12	Update NSF Stats / Reg DD Fees	906	Update NSF Stats / Reg DD Fees
13	Update Loan Classification Code	900	Update Loan Classification Code on Acct

Sunset of a Few Outdated Features

✓ Good-bye to WMail and WCalendar...and others

As announced already, we are sunsetting the WMail and WCalendar features with this release. With the availability of online and software tools designed for communication and scheduling, this moved seemed to be a timely one. We also sunset the Employee Register report and a few other tools that had very low usage or were not relevant with the new architecture.

The new infrastructure we built to support the new navigation will give us better insight than ever into which other tools have outlived their usefulness. In the coming months don't be surprised to see many more functions pulled out of service, particularly old reports, as we continue to streamline CU*BASE tools for the way our credit unions work today.

Self Processor Credit Unions

✓ Accessing the Operations Edition from the New Home Page

Once the release is implemented, you will use **Tool #571: Operations Menu** to you to access the Operations Edition from the new **Home Page**. All employees with access to an Operations command will be assigned this tool at conversion. (All other Operation command assignments will also convert with the 17.03 release.)

To jump from the **Home Page** to the Operations Edition type "oper" in the **Shortcut** field.

✓ New Method to Assign Operations Commands to Employees

Learn more: [Employee Security booklet](#) and [online help](#).

With this release the method for assigning security access to Oper commands has moved to the **Credit Union Configurations 1 (MNOP12)** menu. Select the new **#23: Employee Security for OPER Cmds**, and you will enter the screens that function in a similar manner as the Employee Security menu screens currently in use.

This is because the tools that appear on the OPER menus (MNOPxx) are still governed by the old menu-style security controls. While we do expect to pull all of these into the new navigation in the future, for now this means that if you need to add or adjust employee profile information, special security, account security, and access to the tools available via the CU*BASE home page, you'll use CU*BASE Employee Security (Tool #327). If you need to adjust any employee's access to commands on OPER menus, you'll need to use the OPER shortcut then navigate to the MNOP12 menu and access the new command.

At the implementation of the release all employees at Self Processing credit unions that have access to the ***CU*BASE Employee Security*** on the Management Processing/ Active Beta Tests menu (MNMGMT) will be granted access to both **Tool #571** (the OPER shortcut) and the new command on MNOP12 listed above. (You will need to grant access to both for any new employee who needs to assign Operations commands.)