

Revised

# Beta Test Checklist

Please complete and score each task and note any comments you may have regarding each task.



Credit Union Name: Alabama Law Enforcement CU

Primary Contact Name: LaVelle Noblitt

Primary Contact Phone Number: 205-583-4632

Rate each item on a scale of 1-5.  
(5 = highest, 1 = lowest)

- 5 Extremely
- 4 Very
- 3 Somewhat
- 2 Slightly
- 1 Not at all
- N/A Not applicable

Did you complete the task?  
Y/N

How easy was the task?  
1-5

Are you satisfied with the results you received?  
1-5

How helpful will the task be to staff?  
1-5

How likely are you to perform the task after beta?  
1-5

Comments/  
Explanation of Rating

Tool Task

NAVIGATING IN CU*BASE							
Sample	Sample task	Y	3	2	4	5	Example: "This feature will help us to xxx" or "We wish this feature was xxx"
General navigation	Use the new home page to navigate to your CU*BASE tools	y	5	5	5	5	Wish we had more color choices for personalization
Finding tools	Use the Sort, Search and Filter features to locate and arrange tools	y	4	4	5	5	Assists in narrowing the available tools
Launching tools	Launch tools using both the Tool # and Shortcut methods	Y	4	5	5	5	Much easier than the MN shortcuts
Favorites	Set up a few tools as Favorites; change your preferences to show Favorites as your default view; try selecting color themes and other Preferences settings the log off/back on to ensure the selected theme and other settings are retained	Y	5	5	5	5	Keeps my home page clean
SECURITY ADMINISTRATION							
Conversion	Review the conversion report and verify the tool assignments for your employees	Y	5	4	4	5	There were a few assignments that did not refresh, but we got that fixed.

Rate each item on a scale of 1-5.

(5 = highest, 1 = lowest)

5 Extremely

4 Very

3 Somewhat

2 Slightly

1 Not at all

N/A Not applicable

Did you complete the task?

Y/N

How easy was the task?

1-5

Are you satisfied with the results you received?

1-5

How helpful will the task be to staff?

1-5

How likely are you to perform the task after beta?

1-5

Comments/  
Explanation of Rating

Tool Task

Tool	Task	Did you complete the task?	How easy was the task?	Are you satisfied with the results you received?	How helpful will the task be to staff?	How likely are you to perform the task after beta?	Comments/ Explanation of Rating
		Y/N	1-5	1-5	1-5	1-5	
Employee Profile	Experiment with the sort and search features on the main Employee Security Maintenance screen (Tool #327). Adjust one or more employee profiles to populate the new fields (start date, email address, NMLSR #).	Y	5	5	5	5	These features are easy to navigate. Like the information being in the system
Job Classifications	Assign one of the Job Classification codes to at least one of your employees. Use the "Assign Tools to This Employee" feature for that employee and use the "Show..." toggle to compare the employees assignments to the recommended list. Ask that employee to test the "Recommended Tools" button on the home page. (Remember a user must log off/back on to see changes you've made to their security settings.)	Y	5	5	5	5	Job classifications were easy to navigate; no issues
Other Employee Security Features	Access all of the other options on the main Employee Security Maintenance screen to verify that all buttons work and screens appear as expected.	Y	5	5	5	5	Did not have any issues with these options
Assign Tools to Multiple Employees	Use the "All Tool Assignments" feature to assign multiple employees to a tool. Page Up and Down and make sure that the # Employees counts appear as expected.	Y	5	5	5	5	Verified employee counts were accurate; no issues
Assign Tools to Single Employee	Select an employee ID and use "Assign Tools to this Employee" to adjust access to tools for that employee. Page Up and Down and make sure that the # Employees and This Employee columns appear as expected.	Y	5	5	5	5	There were no new issues with this since the beginning of BETA
Security Maintenance File	Use the "View Maintenance" feature (from the main Employee Security Maintenance screen) to verify the maintenance you've performed using the new tools.	Y	5	4	4	5	Changes were reflected properly
Reports	Run the Employee Security Audit Reports (Tool #357) and verify the reports generate as expected and data is accurate, especially on the Assigned Tools Audit Report.	Y	5	5	5	5	Reports were accurate and assisted in adding tools where needed.

Rate each item on a scale of 1-5.  
(5 = highest, 1 = lowest)

5 Extremely

4 Very

3 Somewhat

2 Slightly

1 Not at all

N/A Not applicable

Did you complete the task?

Y/N

How easy was the task?

1-5

Are you satisfied with the results you received?

1-5

How helpful will the task be to staff?

1-5

How likely are you to perform the task after beta?

1-5

Comments/  
Explanation of Rating

Tool Task

M I S C E L L A N E O U S

Account Security

Find an account that has account security restrictions on it – specifically an account that blocks one or more employees via the “maintenance” flag. Then test to ensure that an unauthorized employee cannot access that account via all of the maintenance options listed on pages 12-13 of the release summary.

Y

5

5

5

5

Navigated restricted accounts with no problem; was able to add and remove restrictions with ease

G E N E R A L C O M M E N T S

Revised

# Beta Test Checklist

Please complete and score each task and note any comments you may have regarding each task.



Credit Union Name: Aneca Federal Credit Union

Primary Contact Name: Susan McClure

Primary Contact Phone Number: (318) 698-6341

Rate each item on a scale of 1-5.  
(5 = highest, 1 = lowest)

- 5 Extremely
- 4 Very
- 3 Somewhat
- 2 Slightly
- 1 Not at all
- N/A Not applicable

Did you complete the task?  
Y/N

How easy was the task?  
1-5

Are you satisfied with the results you received?  
1-5

How helpful will the task be to staff?  
1-5

How likely are you to perform the task after beta?  
1-5

Comments/  
Explanation of Rating

Tool Task

NAVIGATING IN CU*BASE							
Sample	Sample task	Y	3	2	4	5	Example: "This feature will help us to xxx" or "We wish this feature was xxx"
General navigation	Use the new home page to navigate to your CU*BASE tools	Y	5	5	5	5	This feature allows users to see their assigned tools easily and not have a bunch of options they can't get into.
Finding tools	Use the Sort, Search and Filter features to locate and arrange tools	Y	5	5	5	5	This is an awesome feature and it has been enhanced to make finding something easier. Instead of a whole page full of duplicate information you get a few things that are prevalent to what you are looking for.
Launching tools	Launch tools using both the Tool # and Shortcut methods	Y	5	4	4	5	This feature allows us to use what we are comfortable with. Whether it's a menu name or the tool number.

Rate each item on a scale of 1-5.

(5 = highest, 1 = lowest)

5 Extremely

4 Very

3 Somewhat

2 Slightly

1 Not at all

N/A Not applicable

Did you complete the task?  
Y/N

How easy was the task?  
1-5

Are you satisfied with the results you received?  
1-5

How helpful will the task be to staff?  
1-5

How likely are you to perform the task after beta?  
1-5

Comments/  
Explanation of Rating

Tool Task

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
Favorites	Set up a few tools as Favorites; change your preferences to show Favorites as your default view; try selecting color themes and other Preferences settings the log off/back on to ensure the selected theme and other settings are retained	Y	4	4	3	3	Setting favorites was easy. Being able to select your favorites makes it easier to complete your repeated daily tasks.  We wish when selecting a new favorite there was an option to select next available instead of manually assigning favorites. This would come in handy when added responsibility is given to an employee or a new employee comes on board.
<b>S E C U R I T Y   A D M I N I S T R A T I O N</b>							
Conversion	Review the conversion report and verify the tool assignments for your employees	Y	4	4	3	3	Tool assignments did not come over as clean as we would have liked, however I must compliment the CUA team for working with us to get it corrected.
Employee Profile	Experiment with the sort and search features on the main Employee Security Maintenance screen (Tool #327). Adjust one or more employee profiles to populate the new fields (start date, email address, NMLSR #).	Y	4	4	2	3	We will use this to add new employees. This function is mainly for our security officer so it wouldn't be used by any other staff.
Job Classifications	Assign one of the Job Classification codes to at least one of your employees. Use the "Assign Tools to This Employee" feature for that employee and use the "Show..." toggle to compare the employees assignments to the recommended list. Ask that employee to test the "Recommended Tools" button on the home page. (Remember a user must log off/back on to see changes you've made to their security settings.)	Y	4	4	5	3	This feature will allow curious employees to look at tools recommended for their job.

Rate each item on a scale of 1-5.

(5 = highest, 1 = lowest)

5 Extremely

4 Very

3 Somewhat

2 Slightly

1 Not at all

N/A Not applicable

Did you complete the task?  
Y/N

How easy was the task?  
1-5

Are you satisfied with the results you received?  
1-5

How helpful will the task be to staff?  
1-5

How likely are you to perform the task after beta?  
1-5

Comments/  
Explanation of Rating

Tool Task

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
Other Employee Security Features	Access all of the other options on the main Employee Security Maintenance screen to verify that all buttons work and screens appear as expected.	Y	4	3	3	4	This function is great if you have a new employee starting. It would be great if there was an option to remove all permission from a user or an archive user for them to be reused. It would also be great if when coping one profile to the next if the employee has more access than the selected to copy from that it automatically removes any access not being copied.
Assign Tools to Multiple Employees	Use the "All Tool Assignments" feature to assign multiple employees to a tool. Page Up and Down and make sure that the # Employees counts appear as expected.	Y	5	5	2	3	This is a great feature and will help us quickly assign new tools to multiple employees quickly.
Assign Tools to Single Employee	Select an employee ID and use "Assign Tools to this Employee" to adjust access to tools for that employee. Page Up and Down and make sure that the # Employees and This Employee columns appear as expected.	Y	5	4	3	2	This is an easy way to assign one employee certain tools needed.
Security Maintenance File	Use the "View Maintenance" feature (from the main Employee Security Maintenance screen) to verify the maintenance you've performed using the new tools.	Y	5	5	3	3	This will help us easily pin point any maintenance changes that were no authorized.
Reports	Run the Employee Security Audit Reports (Tool #357) and verify the reports generate as expected and data is accurate, especially on the Assigned Tools Audit Report.	Y	5	4	3	3	This functioned as expected. Assignments for employees are correct.

M I S C E L L A N E O U S

Rate each item on a scale of 1-5.

(5 = highest, 1 = lowest)

5 Extremely

4 Very

3 Somewhat

2 Slightly

1 Not at all

N/A Not applicable

Did you complete the task?

How easy was the task?

Are you satisfied with the results you received?

How helpful will the task be to staff?

How likely are you to perform the task after beta?

Comments/  
Explanation of Rating

Tool Task

Y/N

1-5

1-5

1-5

1-5

Account Security

Find an account that has account security restrictions on it – specifically an account that blocks one or more employees via the “maintenance” flag. Then test to ensure that an unauthorized employee cannot access that account via all of the maintenance options listed on pages 12-13 of the release summary.

Y

5

5

2

2

This worked as expected. Accounts coded as employee accounts can be accessed by those who should have access.

GENERAL COMMENTS

- When adding a Favorite having the number auto assign would be great. The system in place for adding subsidiaries is a great program and maybe the favorites can be modeled after that.
- The “let us know who you are” is a great addition to the system. It makes it easier for employees who may have to work at a different workstation or even a different branch. It makes the temporary change easier to cope with.
- The Learn more about this tool feature is great to have a short description of what that tool does.
- The search feature is amazing when looking for a specific tool. Makes finding tools a lot easier and there aren’t a million other ways to get to it.
- At the same time we started Beta testing, we also implemented Phone op wrap up codes. The buttons moving from the bottom to the top of the screen has been instrumental in training employees to only use phone operator when on the phone with a member.
- Overall BETA testing was an awesome experience and the team there is amazing and easy to work with. We look forward to working with everyone again!



# Beta Test Checklist

Please complete and score each task and note any comments you may have regarding each task.

Credit Union Name: Element FCU

Primary Contact Name: Linda Bodie

Primary Contact Phone Number: 304-721-4145 ext 77

Rate each item on a scale of 1-5.  
(5 = highest, 1 = lowest)

- 5 Extremely
- 4 Very
- 3 Somewhat
- 2 Slightly
- 1 Not at all
- N/A Not applicable

Did you complete the task? Y/N

How easy was the task? 1-5

Are you satisfied with the results you received? 1-5

How helpful will the task be to staff? 1-5

How likely are you to perform the task after beta? 1-5

Comments/  
Explanation of  
Rating

NAVIGATING IN CU*BASE							
Tool	Task	Did you complete the task?	How easy was the task?	Are you satisfied with the results you received?	How helpful will the task be to staff?	How likely are you to perform the task after beta?	Comments/Explanation of Rating
<i>Sample</i>	<i>Sample task</i>	<i>Y</i>	<i>3</i>	<i>2</i>	<i>4</i>	<i>5</i>	<i>Example: "This feature will help us to xxx" or "We wish this feature was xxx"</i>
General navigation	Use the new home page to navigate to your CU*BASE tools	Y	5	5	5	5	
Finding tools	Use the Sort, Search and Filter features to locate and arrange tools	Y	5	5	5	5	
Launching tools	Launch tools using both the Tool # and Shortcut methods	Y	5	5	5	5	



**Tool Task**

Rate each item on a scale of 1-5.  
(5 = highest, 1 = lowest)

5 **Extremely**  
 4 **Very**  
 3 **Somewhat**  
 2 **Slightly**  
 1 **Not at all**  
 N/A **Not applicable**

Did you complete the task? Y/N

How easy was the task? 1-5

Are you satisfied with the results you received? 1-5

How helpful will the task be to staff? 1-5

How likely are you to perform the task after beta? 1-5

**Comments/ Explanation of Rating**

Favorites	Set up a few tools as Favorites; change your preferences to show Favorites as your default view; try selecting color themes and other Preferences settings the log off/back on to ensure the selected theme and other settings are retained	Y	5	5	5	5	
<b>SECURITY ADMINISTRATION</b>							
Conversion	Review the conversion report and verify the tool assignments for your employees						
Employee Profile	Experiment with the sort and search features on the main Employee Security Maintenance screen (Tool #327). Adjust one or more employee profiles to populate the new fields (start date, email address, NMLSR #).						
Job Classifications	Assign one of the Job Classification codes to at least one of your employees. Use the “Assign Tools to This Employee” feature for that employee and use the “Show...” toggle to compare the employees assignments to the recommended list. Ask that employee to test the “Recommended Tools” button on the home page. (Remember a user must log off/back on to see changes you’ve made to their security settings.)						
Other Employee Security Features	Access all of the other options on the main Employee Security Maintenance screen to verify that all buttons work and screens appear as expected.						

Rate each item on a scale of 1-5.  
(5 = highest, 1 = lowest)

- 5 **Extremely**
- 4 **Very**
- 3 **Somewhat**
- 2 **Slightly**
- 1 **Not at all**
- N/A **Not applicable**

Did you complete the task?

Y/N

How easy was the task?

1-5

Are you satisfied with the results you received?

1-5

How helpful will the task be to staff?

1-5

How likely are you to perform the task after beta?

1-5

**Comments/  
Explanation of  
Rating**

**Tool Task**

Tool	Task	Did you complete the task?	How easy was the task?	Are you satisfied with the results you received?	How helpful will the task be to staff?	How likely are you to perform the task after beta?	Comments/ Explanation of Rating
		Y/N	1-5	1-5	1-5	1-5	
Assign Tools to Multiple Employees	Use the “All Tool Assignments” feature to assign multiple employees to a tool. Page Up and Down and make sure that the # <i>Employees</i> counts appear as expected.						
Assign Tools to Single Employee	Select an employee ID and use “Assign Tools to this Employee” to adjust access to tools for that employee. Page Up and Down and make sure that the # <i>Employees</i> and <i>This Employee</i> columns appear as expected.						
Security Maintenance File	Use the “View Maintenance” feature (from the main Employee Security Maintenance screen) to verify the maintenance you’ve performed using the new tools.						
Reports	Run the Employee Security Audit Reports (Tool #357) and verify the reports generate as expected and data is accurate, especially on the Assigned Tools Audit Report.						
<b>M I S C E L L A N E O U S</b>							
Account Security	Find an account that has account security restrictions on it - specifically an account that blocks one or more employees via the “maintenance” flag. Then test to ensure that an unauthorized employee cannot access that account via all of the maintenance options listed on pages 12-13 of the release summary.						

**Tool**      **Task**

Rate each item on a scale of 1-5.  
(5 = highest, 1 = lowest)

5	<b>Extremely</b>
4	<b>Very</b>
3	<b>Somewhat</b>
2	<b>Slightly</b>
1	<b>Not at all</b>
N/A	<b>Not applicable</b>

Did you complete the task?	How easy was the task?	Are you satisfied with the results you received?	How helpful will the task be to staff?	How likely are you to perform the task after beta?
Y/N	1-5	1-5	1-5	1-5

**Comments/  
Explanation of  
Rating**

**GENERAL COMMENTS**

Revised

# Beta Test Checklist

Please complete and score each task and note any comments you may have regarding each task.



Credit Union Name: Glacier Hills Credit Union

Primary Contact Name: Kara C Guse

Primary Contact Phone Number: 262-338-2141

Rate each item on a scale of 1-5.  
(5 = highest, 1 = lowest)

- 5 Extremely
- 4 Very
- 3 Somewhat
- 2 Slightly
- 1 Not at all
- N/A Not applicable

Did you complete the task?  
Y/N

How easy was the task?  
1-5

Are you satisfied with the results you received?  
1-5

How helpful will the task be to staff?  
1-5

How likely are you to perform the task after beta?  
1-5

Comments/  
Explanation of Rating

Tool Task

NAVIGATING IN CU*BASE							
Sample	Sample task	Y	3	2	4	5	Example: "This feature will help us to xxx" or "We wish this feature was xxx"
General navigation	Use the new home page to navigate to your CU*BASE tools	Y	5	5	5	5	Love the point & click feature
Finding tools	Use the Sort, Search and Filter features to locate and arrange tools	Y	3	3	3	5	Took a little bit but did reference the "menus" and attached to my favorites
Launching tools	Launch tools using both the Tool # and Shortcut methods	Y	5	5	5	5	Very easy if you know the tool #
Favorites	Set up a few tools as Favorites; change your preferences to show Favorites as your default view; try selecting color themes and other Preferences settings the log off/back on to ensure the selected theme and other settings are retained	Y	5	5	5	5	A lot easier to just point and click
SECURITY ADMINISTRATION							
Conversion	Review the conversion report and verify the tool assignments for your employees	Y	3	3	NA	NA	I had cleaned up the system, but with all the updates on the users, I am waiting to make sure all is well before I clean it up

Rate each item on a scale of 1-5.

(5 = highest, 1 = lowest)

5 Extremely

4 Very

3 Somewhat

2 Slightly

1 Not at all

N/A Not applicable

Did you complete the task?

How easy was the task?

Are you satisfied with the results you received?

How helpful will the task be to staff?

How likely are you to perform the task after beta?

Comments/  
Explanation of Rating

Tool Task

Tool	Task	Did you complete the task?	How easy was the task?	Are you satisfied with the results you received?	How helpful will the task be to staff?	How likely are you to perform the task after beta?	Comments/ Explanation of Rating
		Y/N	1-5	1-5	1-5	1-5	
Employee Profile	Experiment with the sort and search features on the main Employee Security Maintenance screen (Tool #327). Adjust one or more employee profiles to populate the new fields (start date, email address, NMLSR #).	Y	5	5	Na	5	I really like this feature
Job Classifications	Assign one of the Job Classification codes to at least one of your employees. Use the "Assign Tools to This Employee" feature for that employee and use the "Show..." toggle to compare the employees assignments to the recommended list. Ask that employee to test the "Recommended Tools" button on the home page. (Remember a user must log off/back on to see changes you've made to their security settings.)	Y	5	5	NA	5	So easy to assign tools to a group, remove from a group, assign to an individual, etc. Love it!
Other Employee Security Features	Access all of the other options on the main Employee Security Maintenance screen to verify that all buttons work and screens appear as expected.	Y	5	5	Na	5	
Assign Tools to Multiple Employees	Use the "All Tool Assignments" feature to assign multiple employees to a tool. Page Up and Down and make sure that the # <i>Employees</i> counts appear as expected.	Y	5	5	Na	5	Works well. Much better than the old version.
Assign Tools to Single Employee	Select an employee ID and use "Assign Tools to this Employee" to adjust access to tools for that employee. Page Up and Down and make sure that the # <i>Employees</i> and <i>This Employee</i> columns appear as expected.	Y	5	5	Na	5	Works well. Much better than the old version.
Security Maintenance File	Use the "View Maintenance" feature (from the main Employee Security Maintenance screen) to verify the maintenance you've performed using the new tools.	Y	5	5	Na	5	
Reports	Run the Employee Security Audit Reports (Tool #357) and verify the reports generate as expected and data is accurate, especially on the Assigned Tools Audit Report.	Y	5	5	Na	5	Still working on this.

Rate each item on a scale of 1-5.

(5 = highest, 1 = lowest)

5 Extremely

4 Very

3 Somewhat

2 Slightly

1 Not at all

N/A Not applicable

Did you complete the task?  
Y/N

How easy was the task?  
1-5

Are you satisfied with the results you received?  
1-5

How helpful will the task be to staff?  
1-5

How likely are you to perform the task after beta?  
1-5

Comments/  
Explanation of Rating

Tool Task

M I S C E L L A N E O U S							
Account Security	Find an account that has account security restrictions on it – specifically an account that blocks one or more employees via the “maintenance” flag. Then test to ensure that an unauthorized employee cannot access that account via all of the maintenance options listed on pages 12-13 of the release summary.	Y	5	5	Na	5	Yes. Confirmed.
G E N E R A L C O M M E N T S							

**Additional Notes:**

NEW NOTES from 2<sup>nd</sup> part of Beta Testing:

1. When searching for a screen, you enter in the criteria, locate your screen and proceed. However, when you back out of the screens you were working in, it takes you back to your search criteria. It would be great if it would clear out the search criteria box and bring you back to your main list. Without clearing it out, it adds additional clicks to our process...and takes longer.
2. When performing a transaction, there is a brief glance of the database page just before a prodoc screen pops up to print a receipt.

It would be nice if there was a home button at the bottom of every screen to take you back to the Tool Page with one click.



**Additional Staff Input**

N A V I G A T I N G I N C U * B A S E							
<i>Sample</i>	<i>Sample task</i>	<i>Y</i>	<i>3</i>	<i>2</i>	<i>4</i>	<i>5</i>	<i>Example: "This feature will help us to xxx" or "We wish this feature was xxx"</i>
General navigation	Use the new home page to navigate to your CU*BASE tools	Y	4	5	5	4	
Finding tools	Use the Sort, Search and Filter features to locate and arrange tools	Y	4	5	5	4	
Launching tools	Launch tools using both the Tool # and Shortcut methods	Y	4	5	5	4	
Favorites	Set up a few tools as Favorites; change your preferences to show Favorites as your default view; try selecting color themes and other Preferences settings the log off/back on to ensure the selected theme and other settings are retained	Y	4	5	5	4	

N A V I G A T I N G I N C U * B A S E							
<i>Sample</i>	<i>Sample task</i>	<i>Y</i>	<i>3</i>	<i>2</i>	<i>4</i>	<i>5</i>	<i>Example: "This feature will help us to xxx" or "We wish this feature was xxx"</i>
General navigation	Use the new home page to navigate to your CU*BASE tools	Y	4	4	4	5	
Finding tools	Use the Sort, Search and Filter features to locate and arrange tools	Y	5	4	4	4	
Launching tools	Launch tools using both the Tool # and Shortcut methods	Y	4	4	4	4	
Favorites	Set up a few tools as Favorites; change your preferences to show Favorites as your default view; try selecting color themes and other Preferences settings the log off/back on to ensure the selected theme and other settings are retained	Y	4	5	5	4	



**N A V I G A T I N G   I N   C U \* B A S E**

<i>Sample</i>	<i>Sample task</i>	<i>Y</i>	<i>3</i>	<i>2</i>	<i>4</i>	<i>5</i>	<i>Example: "This feature will help us to xxx" or "We wish this feature was xxx"</i>
General navigation	Use the new home page to navigate to your CU*BASE tools	Y	4	5	5	5	
Finding tools	Use the Sort, Search and Filter features to locate and arrange tools	Y	5	5	5	5	
Launching tools	Launch tools using both the Tool # and Shortcut methods	Y	4	5	3	5	Works great for me. Staff would need to know shortcuts.
Favorites	Set up a few tools as Favorites; change your preferences to show Favorites as your default view; try selecting color themes and other Preferences settings the log off/back on to ensure the selected theme and other settings are retained	Y	5	5	5	5	Enjoy that favorites follow to each workstation.

**N A V I G A T I N G   I N   C U \* B A S E**

<i>Sample</i>	<i>Sample task</i>	<i>Y</i>	<i>3</i>	<i>2</i>	<i>4</i>	<i>5</i>	<i>Example: "This feature will help us to xxx" or "We wish this feature was xxx"</i>
General navigation	Use the new home page to navigate to your CU*BASE tools	Y	4	4	4	4	Most tools I need are in my available tools which is nice.
Finding tools	Use the Sort, Search and Filter features to locate and arrange tools	Y	5	4	4	5	Helpful to find tool and old shortcuts
Launching tools	Launch tools using both the Tool # and Shortcut methods	Y	4	4	4	3	There are a lot of tool numbers to remember.
Favorites	Set up a few tools as Favorites; change your preferences to show Favorites as your default view; try selecting color themes and other Preferences settings the log off/back on to ensure the selected theme and other settings are retained	Y	4	3	4	4	Favorites section is very handy. I wish I didn't have to click back on all available tools when I go to search for something else. I forgot when I am in my favorite tools.

N A V I G A T I N G I N C U \* B A S E

<i>Sample</i>	<i>Sample task</i>	<i>Y</i>	<i>3</i>	<i>2</i>	<i>4</i>	<i>5</i>	<i>Example: "This feature will help us to xxx" or "We wish this feature was xxx"</i>
General navigation	Use the new home page to navigate to your CU*BASE tools	Y	4	4	4	5	
Finding tools	Use the Sort, Search and Filter features to locate and arrange tools	Y	4	4	4	5	
Launching tools	Launch tools using both the Tool # and Shortcut methods	Y	5	5	5	5	
Favorites	Set up a few tools as Favorites; change your preferences to show Favorites as your default view; try selecting color themes and other Preferences settings the log off/back on to ensure the selected theme and other settings are retained	Y	5	5	5	5	

**N A V I G A T I N G   I N   C U \* B A S E**

<i>Sample</i>	<i>Sample task</i>	<i>Y</i>	<i>3</i>	<i>2</i>	<i>4</i>	<i>5</i>	<i>Example: "This feature will help us to xxx" or "We wish this feature was xxx"</i>
General navigation	Use the new home page to navigate to your CU*BASE tools	Y	5	5	5	5	Love the new home page, it is so much more concise to each job. All your
Finding tools	Use the Sort, Search and Filter features to locate and arrange tools	Y	5	5	5	5	Love this too! The only thing is that I wish the search field would clear when switching to a different Tool Box.
Launching tools	Launch tools using both the Tool # and Shortcut methods	Y	5	5	5	5	I already find myself typing in the tool number because I am a key board over mouse user.
Favorites	Set up a few tools as Favorites; change your preferences to show Favorites as your default view; try selecting color themes and other Preferences settings the log off/back on to ensure the selected theme and other settings are retained	Y	5	5	5	5	Default to my Favorites is great! I like the option to scroll through my favorites and find what I want if I don't have the tool number memorized. Color schemes and all other options I tried worked fine.

Revised

# Beta Test Checklist

Please complete and score each task and note any comments you may have regarding each task.



Credit Union Name: MidUSA Credit Union

Primary Contact Name: Lauri Roy

Primary Contact Phone Number: 513-420-5827 (office) or 513-839-0276 (cell)

Rate each item on a scale of 1-5.  
(5 = highest, 1 = lowest)

- 5 Extremely
- 4 Very
- 3 Somewhat
- 2 Slightly
- 1 Not at all
- N/A Not applicable

Did you complete the task?  
Y/N

How easy was the task?  
1-5

Are you satisfied with the results you received?  
1-5

How helpful will the task be to staff?  
1-5

How likely are you to perform the task after beta?  
1-5

Comments/  
Explanation of Rating

Tool Task

NAVIGATING IN CU*BASE							
Sample	Sample task	Y	3	2	4	5	Example: "This feature will help us to xxx" or "We wish this feature was xxx"
General navigation	Use the new home page to navigate to your CU*BASE tools						
Finding tools	Use the Sort, Search and Filter features to locate and arrange tools						
Launching tools	Launch tools using both the Tool # and Shortcut methods						
Favorites	Set up a few tools as Favorites; change your preferences to show Favorites as your default view; try selecting color themes and other Preferences settings the log off/back on to ensure the selected theme and other settings are retained						

**Tool Task**

Rate each item on a scale of 1-5.

(5 = highest, 1 = lowest)

- 5 Extremely
- 4 Very
- 3 Somewhat
- 2 Slightly
- 1 Not at all
- N/A Not applicable

Did you complete the task?  
Y/N

How easy was the task?  
1-5

Are you satisfied with the results you received?  
1-5

How helpful will the task be to staff?  
1-5

How likely are you to perform the task after beta?  
1-5

**Comments/ Explanation of Rating**

SECURITY ADMINISTRATION							
Conversion	Review the conversion report and verify the tool assignments for your employees						
Employee Profile	Experiment with the sort and search features on the main Employee Security Maintenance screen (Tool #327). Adjust one or more employee profiles to populate the new fields (start date, email address, NMLSR #).						
Job Classifications	Assign one of the Job Classification codes to at least one of your employees. Use the "Assign Tools to This Employee" feature for that employee and use the "Show..." toggle to compare the employees assignments to the recommended list. Ask that employee to test the "Recommended Tools" button on the home page. (Remember a user must log off/back on to see changes you've made to their security settings.)	Y					I am not sure exactly what I am supposed to look for when I use the "Assign Tools to This Employee" but all I see is the list of all tools, not the ones suggested with the job classification. Should I only be seeing the ones that a job classification recommends for that employee or all of the tools?
Other Employee Security Features	Access all of the other options on the main Employee Security Maintenance screen to verify that all buttons work and screens appear as expected.						
Assign Tools to Multiple Employees	Use the "All Tool Assignments" feature to assign multiple employees to a tool. Page Up and Down and make sure that the # Employees counts appear as expected.						
Assign Tools to Single Employee	Select an employee ID and use "Assign Tools to this Employee" to adjust access to tools for that employee. Page Up and Down and make sure that the # Employees and This Employee columns appear as expected.						
Security Maintenance File	Use the "View Maintenance" feature (from the main Employee Security Maintenance screen) to verify the maintenance you've performed using the new tools.						

Rate each item on a scale of 1-5.

(5 = highest, 1 = lowest)

5 Extremely

4 Very

3 Somewhat

2 Slightly

1 Not at all

N/A Not applicable

**Tool Task**

Did you complete the task?

How easy was the task?

Are you satisfied with the results you received?

How helpful will the task be to staff?

How likely are you to perform the task after beta?

**Comments/  
Explanation of Rating**

Reports

Run the Employee Security Audit Reports (Tool #357) and verify the reports generate as expected and data is accurate, especially on the Assigned Tools Audit Report.

Y/N

1-5

1-5

1-5

1-5

**M I S C E L L A N E O U S**

Account Security

Find an account that has account security restrictions on it – specifically an account that blocks one or more employees via the “maintenance” flag. Then test to ensure that an unauthorized employee cannot access that account via all of the maintenance options listed on pages 12-13 of the release summary.

Y

5

5

5

5

Would not allow me to maintenance my account for any of the options on those pages.

**G E N E R A L C O M M E N T S**