New Tools

Product:	Version #:	To be released to:	On date:
CU*BASE® GOLD	17.10	Online CUs	**October 22, 2017**
		Site-Four	**October 22, 2017**
		Self-Processors	**November 13-14, 2017**

ATTENTION CREDIT UNION SECURITY ADMINISTRATORS

With the new navigation and employee security introduced in the 17.03 release, your responsibilities for a new release have changed significantly. Now you only need to take a look at the brand-new tools being introduced with each new release and assign them to the appropriate employees once the release goes live.

To find the new tools introduced in the most recent release:

From the Home Page:

1. Click Filter by Category
2. Choose **_NEWTOOLS**
3. Click Select or ➡

TIP: Remember you won't see them listed under "My Tools" until you've been assigned access to them!

In Employee Security:

1. Launch **Tool #327 CU*BASE Employee Security**
2. Click **All Tool Assignments**
3. Click the Categories Select button
4. Choose **_NEWTOOLS**
5. Click Select or ➡

NEW TOOLS IN THIS RELEASE

Tool #	Tool Title	Recommended For
1075	Reassign Collector on Accounts	Collections team, member service supervisors, loan officers
1105	Bill Pay Payments Analysis Dashbd	CU management, member service supervisors, branch managers, head tellers
1106	Bill Pay Subscriber Profile Dashbd	CU management, member service supervisors, branch managers, head tellers
1900	Workflow Controls: Accounts Payable	Branch managers, accounting teams
1910	AP 2: Organize AP Invoices for Processing	Branch managers, accounting teams, accounts payable team
1920	Approve Accounts Payable Invoices	Branch managers, accounting teams, accounts payable team
1961	AP 3: Process Accounts Payable Payments **NOTE:** This tool replaces **Tool #787** *Select Invoices for Payment*. While the functionality of the former tool exists in the new tool, there are additional abilities in the new tool that may not apply to employees who previously had security. Please review your security to Tool #787 prior to the release as it pertains to re-assigning authority.	Branch managers, accounting teams, accounts payable team
1962	Build Compromised Card File	EFT team, member service supervisors

1970	Post Investment Payments	Branch managers, head tellers, accounting teams
1975	Identify Mbrs Close to Next Tier Lvl	Marketing leaders, member service supervisors, branch managers, head tellers
1980	Library Dashboard	Database administrators, CU management
1981	Library Authority Management	Database administrators, CU management

MENU CHANGES: CU*BASE OPERATOR EDITION

For self-processing credit union clients only.

To adjust access to these commands:
1. Navigate to OPER, go to MNOP12 and launch **#23 Employee Security for OPER Cmds**
2. Use **Oper Menu Security** (F2)
3. Use **Alternate View** to sort the list by menu name
4. Type the menu name and use Enter to display all users who currently have access to that menu
5. Select one or more users in the list (hold Ctrl and click to select multiple names), then use **Edit** to adjust access to individual menu commands

Remember that if a person already had access to the commands on a particular menu, new commands added to that menu will be set up to *allow* access (checked) for that person automatically.

Menu Name	Old Menu	New Menu
MNOP07 ☐ Added option **#27** to go to new menu MNOPTS (see below)		
MNOP08 ☐ New label only for option **#2**		

Menu Name	Old Menu	New Menu
MNOP21 ☐ New label only for option **#29** ☐ Added new option **#17 Upd Svc Charge Lookup Descriptns** *(used by CU*Answers to update file/field descriptions shown when configuring Service Charge codes)*	**Miscellaneous CSR/Programmer Tools** — MNOP21 Tools for CSRs/Programmers ONLY 1 Flood e-Stmt Mbrs for e-Notices 2 Flood Mail Code to Opt Out Flag 3 Credit CARD Act–Flood Due Dates 4 Gender Generator 5 Open End Contract Flood 6 Network Community Controls 7 View EOMFILES Config 8 Run Service Charge Audit/Test 9 Credit Score Soft Pull - Upload 10 Process Date Tracking 11 Purge Susp Dormant Rcds (DIMAST) 12 Transaction Re-sequence 13 TCD/TCR Error Log Inquiry 16 Resend BP Post File After Recvry *** CONVERSION TRAINING ONLY ** 18 Update Processing Date 19 Run Teller Beginning of Day Misc Online CU Usage Reports 21 PIB Usage Statistics 22 5300 Usage Stats 23 5300 Accounts Using Auto-pops 24 CUs Using 5300 Upload to NCUA 25 QUERYxx Analysis Report Beta/Limited Release Projects 29 MyCUToday Warehouse: Master List 30 Post RDC File from Cachet	**Miscellaneous CSR/Programmer Tools** — MNOP21 Tools for CSRs/Programmers ONLY 1 Flood e-Stmt Mbrs for e-Notices 2 Flood Mail Code to Opt Out Flag 3 Credit CARD Act–Flood Due Dates 4 Gender Generator 5 Open End Contract Flood 6 Network Community Controls 7 View EOMFILES Config 8 Run Service Charge Audit/Test 9 Credit Score Soft Pull - Upload 10 Process Date Tracking 11 Purge Susp Dormant Rcds (DIMAST) 12 Transaction Re-sequence 13 TCD/TCR Error Log Inquiry 16 Resend BP Post File After Recvry 17 Upd Svc Charge Cfg Lookup Desc *** CONVERSION TRAINING ONLY ** 18 Update Processing Date 19 Run Teller Beginning of Day Misc Online CU Usage Reports 21 PIB Usage Statistics 22 5300 Usage Stats 23 5300 Accounts Using Auto-pops 24 CUs Using 5300 Upload to NCUA 25 QUERYxx Analysis Report Beta/Limited Release Projects 29 Analytics Booth: Master List 30 Post RDC File from Cachet
MNOPBV ☐ Added new options **#11** and **#12** for receiving and posting insurance files from Combined Insurance	**Miscellaneous Vendor Processing** — MNOPBV BancVue Processing 1 Send Current File 2 Receive Monthly BancVue Files 3 Apply BancVue Pass/Fail File 4 Post BancVue Transaction File 5 Resend Prior-Day Files Dealer Track 8 Create/Send (FDI) Daily File	**Miscellaneous Vendor Processing** — MNOPBV BancVue Processing 1 Send Current File 2 Receive Monthly BancVue Files 3 Apply BancVue Pass/Fail File 4 Post BancVue Transaction File 5 Resend Prior-Day Files Dealer Track 8 Create/Send (FDI) Daily File Combined Insurance 11 Receive Combined Insurance File 12 Post Combined Insurance File
MNOPTS ☐ New menu for transmitting statement files to vendors *(replaces programs previously on CU Custom menus)*	NEW MENU	**Transmit Statement Files** — MNOPTS Regular Member Statements 1 API 2 Bridgestone 3 Diamond Marketing 4 Harland Clarke 5 LKCS 6 OSG 7 Qualified Presort Credit Card Statements 16 LKCS 17 OSG 18 Qualified Presort Mortgage Statements 25 Qualified Presort

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