

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 March.

Modifications

- 45619 Check fee box is no longer appearing when check fees are turned off in Xtend Shared Branching.
- 45689 Eliminated duplicate record error in reference file when creating a new membership.
- 46736 Update to allow changes to the remitter line of an accounts payable check when edit is selected.
- 47223 In Loan Category Maintenance, updated to not allow Send 1098 tax form box to be checked when Process Type = S or P (student loan).
- 47606 Update to the display of PIB update flags for members in online banking.
- 47006 Added a message to user when teller control record is already in use by someone.
- 47154 Added an edit message in the Assigned Tiered Services Points Levels screen to clarify then the tiered fields are not set correctly.
- 47683 Eliminated error for new credit unions in the Where Your Members Shop Dashboard.
- 47475 Analytics Booth: Dashboard data collection for Tiered Services was moved to the 4th of the month.
- 47195 Analytics Booth: Removed error when updating the email address for a member under the Member Management – Manage Members screen.
- 47321 Analytics Booth: Corrected the value for total membership on the Learn-From-Peer page of the Tiered Services Comparison Dashboard.
- 44426 Adjusted the report for the Standard Bonus Dividend Simulation to better identify calculations for accrued dividends.
- 43569 Eliminated bill pay messages that are transmitted between CU*Answers and Payveris.
- 44527 Creation of purge program for the Vendor Notice table
- 45505 Adjustments on tool security to appropriately display options where menu security does not apply.

- 45597 Increased the size of count field in credit score soft pull.
- 45816 Altered the uncollected funds maintenance to not lock MEMBER record.
- 46087 Updated account limits for Tool #979 – Where your members shop.
- 46138 Switched the GoAnywhere Transmission of Member list sent to SerTech to be generic instead of CU Specific.
- 46285 Added a toggle to include 'Invoice Due Date' on the paid items history for accounts payable vendors.
- 46813 Modified the account adjustment program to only lock MEMBER when updating the table.
- 46859 Update to prevent Non Member Maintenance from accessing Master Alternative Address Maintenance.
- 46875 Duplicate screen ID project – updated to assist with display of help – IFABDV-01.
- 46884 Duplicate screen ID project – updated to assist with display of help – IGOLD-03.
- 46975 Update to make the recording of phone optics data independent of the wrap up code configuration.
- 47149 Losing the Love Dashboard: Option 1 – when selecting different data to view, update to not re-sequence file.
- 47410 Created a database view over the new online banking security tables that can be used in place of the PCMBRCFG file for analysis.
- 46900, 46901, 46903, 46919, 46916, 46918, & 46925 Duplicate screen ID project to display help as expected.
- 47523 Updated the BancVue program for online banking security changes with the 18.03 release.
- 47297 Analytics Booth: Update to rearrange processing order of Analytics Booth Trends/Alerts data collection.
- 47255 Performance improvements with DAON Authentication during new logins.

Enhancements

- 45866 Analytics Booth: Ten Year Trends Dashboard – Update to display forecasted values for the current year.
- 46148 Analytics Booth: Created an executive trend line to existing trend graphics.
- 46459 Analytics Booth: Update to receive daily member counts.
- 46973 Analytics Booth: Updated the trends graph to include the year in

- 46974 the heading of the graph tooltip.
Analytics Booth: Updated the Loan/Savings/Certificate portfolio dashboard graphs to include the year in the heading of the graph tooltips.
- 47329 Analytics Booth: Updated the Loan/Savings/Certificate portfolio dashboards to change the default "View" selection.
- 41907 Updated credential security to match data security standards.
- 42403 OTB Total Look – creation of a new table view that combines OTB loan and MEMBER5/6 files for CU Query purposes.
- 43307 Update to allow 'Temp to Perm' Card processing for Vantiv.
- 44266 Changed the online application membership creation flow to allow an account number to be manually assigned.
- 45114 Enhanced the It's Me 247 "See" functionality to allow CUs to choose to display only accounts with an ownership records by SSN.
- 45321 Integration of Authentication API into It's Me 247 Desktop and Mobile Web.
- 45341 It's Me 247 Transfer Control Enhancements: Adding Account Suffices to Transfer Controls.
- 45365 Created an option to restore ACH warehouse files from archival backups.
- 45710 Created a new library space utilization dashboard to be used to monitor the size of libraries.
- 46480 Created an API for PIB Geolocation.

EFT Modifications

- 43331 MANDATE Visa DPS: no longer using Merchant Type to determine an incremental.
- 46460 Corrected how a member name appears when ordering debit cards for organizational accounts.
- 46764 Corrected card screen so the design/image code does not carry over to the next record being worked.
- 46792 Updated compromised card files to have expiration dates of 01/01/71 so that they are not purged as part of the monthly QUERYxx purge process.
- 45418 Updated COOP Shared Branching Issuer to correctly delete holds on check deposits that are reversed.

Internal Modifications

- 47284 Split out 5498/5498-SA forms from 5498-ESA forms to allow for

- a difference in reporting deadlines.
- 47567 Performance enhancements to member and account information capture to BancVue.
- 47472 Added a routine to check space utilization when restoring libraries to stop process when disk space is over 78%.
- 45876 Update to remove system i devices description and OUTQ when deleting workstations or printers when in Device Configuration Maintenance.
- 46416 Deleted orphaned records in household auxiliary files.
- 47562 Created traditional programs for new credit unions at Site 4 that moved to APIs.
- 47594 Changed format on the General Ledger Account field in CSV going to Analytics Booth.
- 44585 Modification to allow for batch reversals of CPI insurance postings.
- 47373 Eliminated error when receiving ACH transactions using the MidAtlantic server.

Internal Enhancements

- 45265 Update to allow member and corporate check posting to run in ROBOT for CU*Answers and Site-Four like ACH posting.

Warranty Modification/Adjustment

- 46995 Analytics Booth: Updated the info button on the portfolio to reflect new times for PROD and Site-Four data collection, and added supported devices.
- 47114 Corrected how the COOP Recon Receive program is getting its number of copies.
- 47271 Now including the escrow amount in the payments for loans reported to the credit bureau.
- 47358 When closing investments in Tool 993, the market value is now correctly changing to zero.
- 47071 Eliminated error on override transaction register if too many options are selected.
- 47303 Updated the descriptions to correctly align with the investment ID number on the Investment Activity Report.
- 40602 Updated the patronage div config screen to correctly default values and screen text to avoid processing errors.
- 46066 Updated the printing general credit union data for tool #689 to pull in the correct data.

- 46493 Updated the accounts payable check credit voucher information to display correctly in vendor inquiry.
- 47529 Updated UPIN to allow new memberships created within CU*BASE to create Online Banking login information.
- 46580 Updated the backup withholding report to show records for closed accounts in a chosen year.
- 47546 Modified the standalone loan app to prevent port messages when members use multiple single-browser sessions.
- 47556 Updated near time alerts to check for a blank CU ID before trying to update the library list.
- 47359 Corrected posting of loan payments extracted from an external file to properly collect delinquency fines when due.
- 47554 Analytics Booth: The Ten Year Trends dashboard no longer fails to load when a credit union only has January data for that dashboard in the database.
- 47563 Updated the Last Login process to properly record the Date/Time of login for first time It's Me 247 users.
- 47566 Cleaned out extraneous PIB profiles to eliminate issues when some members try to log into online banking.
- 47607 Eliminated issue with login when credit union user activates online banking and resets PIN at the same time.
- 46368 Corrected the blocked card exclusion on the credit card skip pay program.
- 46509 Updated credit bureau reporting to report high balance for open end loans in MEMBER5.
- 47527 INSTANTXX queue is now working properly for various tool numbers.
- 47538 The employee menu security report is now accurately reporting tool access for functions where security is not required.
- 47012 Changed the accrual data build programming to point to FILExx libraries instead of snapshot libraries.
- 47597 CU name on OTB Balance and Status Reports is now printing correctly.

Web Modifications

- 46231 It's Me 247 Desktop: Changed web chat in It's Me 247 to open in a new tab.
- 46538 It's Me 247 Mobile: Changed user experience for mobile bill pay when iPay doesn't return a valid token.
- 46566 Update to make email address a required field within the It's Me 247 Online Banking – Loan Application.

- 46851 It's Me 247 Desktop & Mobile (API Authentication): Created input validation for authenticating and changing passwords to notify members when they exceed the number of allowed characters.
- 47153 It's Me 247 Desktop & Mobile: Provided handling for Payveris P2P history for transactions where member sub accounts have been deleted.
- 47161 It's Me 247 Loan Application: Modified HTML to improve accessibility tools (ADA).
- 47602 Changed how the direct login widget interacts with the PIB flags to consistently show Manage My Security when the user has PIB credentials.
- 47611 Corrected the 'forgot password' link in the It's Me 247 Flex Login widget.

Screen Modifications

- 46582 Eliminated erroneous text within the GOLD panel on the Channel Activity by Member Age Group.
- 46606 When adding an application comment, the screen is no longer appearing without the input box.
- 46649 Update button to correctly map to F3 on the Customer Master Inquiry Screen.
- 46753 Updated the joint owner information to properly transmit to Checks for Less when ordering.
- 46707 Implemented GOLD Chart API infrastructure & added charts to Top 5 Dashboards.
- 46899 Updated missing field over the screen ID in the OFAC Scan.
- 47037 Update to show all underwriting comments pages in GOLD Screen.
- 47256 The Filter by Type button is no longer missing in the CTE color scheme.
- 47261 Added Charts to GOLD Dashboards for AI Priorities 6-10.
- 47308 GOLD Charts: Group 3.
- 47323 Updated missing field over the screen ID in tool #316.
- 47346 Updated missing field over the screen ID in tool #652.
- 47342 When a data center employee moves from on CU to another via network communities, the CU Name and Alpha CUID are correctly updated.