

Team	Release #	To be released to:	On date:
Asterisk Intelligence	18.11	Online CUs Self-Processors	November 11, 2018 December 10-11, 2018



cuanswers.com/solutions/asterisk-intelligence/

Feature Availability Key

- You'll see it immediately
- You'll need to activate it
- There may be related fees

Client Access and LegaSuite Reminder!

You **MUST** complete the LegaSuite and Client Access upgrades on your workstation by November 11, 2018. If these updates are not completed, 18.11 will not work. Most importantly, a workstation running the old version of the software **WILL NOT** be able to log on the morning of November 12! Talk to your IT teams today to ensure you will be able to work and use these new tools when they are released. **Additionally, please note that with these upgrades, once a user opens one print session and signs in, any other print sessions the user opens will sign in automatically.**

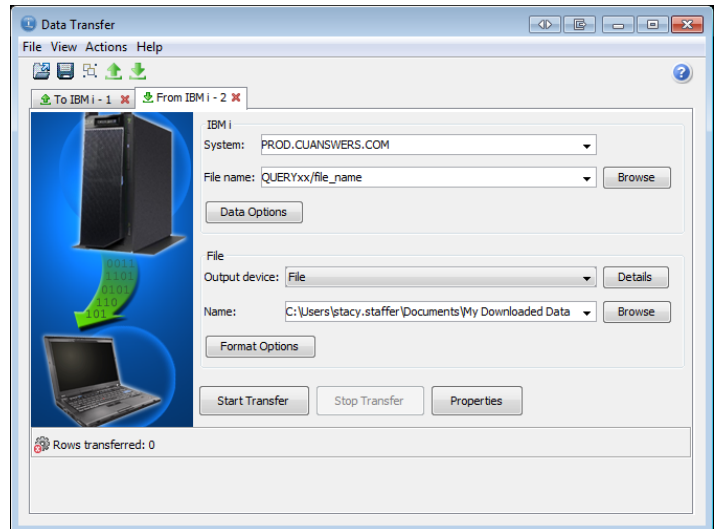
For more information, visit cuanswers.com/2018/10/remember-to-complete-your-client-access-upgrades-by-november-11/

In This Release

A New All-in-One Tool with Upgraded Data Transfer Capabilities

Learn more: [online help](#).

After extensive research and testing, we're excited to finally introduce this gem to the wild! The new IBM Data Transfer tool offers users a new interface with big benefits. New download capabilities allow for saving your CU*BASE data file directly to a .CSV file or an Excel workbook – no more raw text files to fiddle with, just data that is ready and workable, right in the format you want it. The download experience ends with a cleaner workspace, as the pesky .fdf file is no longer automatically downloaded, but instead can be selected per download (or manually generated after the fact).



Something we're very excited about is the option to include field titles or descriptions with each file download; too often we've questioned what a column may mean when reviewing our files, but now the header is displayed, allowing the spreadsheet to be ready for use faster than ever before; simply select your options using the "Details" selection for each file and you're on your way.

Regular users of the previous data transfer wizard can rejoice, as the option to "Convert CCSID" is defaulted, saving that extra step each time. Admittedly, we're most excited about this enhancement!

This all in one tool and new CU*BASE option, **Tool #1375 Data Transfers (Upload or Download)** contains what you need for both uploads and downloads! The interface allows you to stay in the same window and work with all downloads at once.

A Word about Upload/Download Authority

With this new tool, the iSeries permissions will not change. Any staff member that has permissions to upload, download, or both, will still have the same permissions. Your security officer will want to give all people with any authority access to this new tool, however, if a person with download authority only attempts to make an upload in the data transfer tool, it will not work. Tool authority does not override iSeries authority!

To review who has what download/upload authority at your credit union, review the *LSECAUDITM* report each month.

To review what data has been downloaded, monitor the *LSECAUD* report each month.

To request permission changes for additional staff, use the appropriate form:

https://www.cuanswers.com/wp-content/uploads/iShieldRequestForm_Upload.pdf

https://www.cuanswers.com/wp-content/uploads/iShieldRequestForm_Download.pdf

Of course, we aren't making the previous upload and download tools obsolete right out of the gate. Though Tool #1375 will be the tool that takes over as the best solution for facilitating data transfers between CU*BASE and your PC, we want you to get to know this new tool, use it concurrently with the previous data transfer wizard, and most importantly, move forward with a seamless transition to this tool.

The new tool includes a solution for easily converting existing saved transfer requests, however, we suggest taking the time to recreate your transfer requests and saving them. Out with the old and in with the new, to create clean new data. Power users may have a task ahead of them to sort transfer requests and generate new requests and procedures before the old tools are made obsolete next year!

Interested in learning more about the capabilities and features of the new tool?

Join the Asterisk Intelligence team for an informational webinar on Tuesday, November 20! Watch your mailbox for Client News with more details and a registration link.

Focused on Data: Views in CU*BASE Report Builder

Laser Focus: Views Save Time and Effort, and Expertly Deliver Data

Learn more: [online help](#).

What is a View?

It's no secret in the last few releases that we've been promoting the heck out of Views in CU*BASE. So, what exactly is a "View"? A View is an alternative way of representing the data stored in tables. It is not an actual table and it does not have any permanent storage. A View provides a way of looking at the data in one or more tables. A View can combine data from different base tables, summarize data, streamline and update formats in existing tables, use built in selection criteria to only show certain portions of the data, and add clarity to a complex database.

Check out Annalyn Hawkes' take on Views and their future in her blog, [Making a Data Point](https://makingadatapoint.com/query-tips/114/) (<https://makingadatapoint.com/query-tips/114/>)

Why Views?

Views open new doors to understanding data using business logic in ways that simple query cannot. Views can use summary math calculations, use either/or criteria to generate tables, and add additional indicators and labels for better understanding.

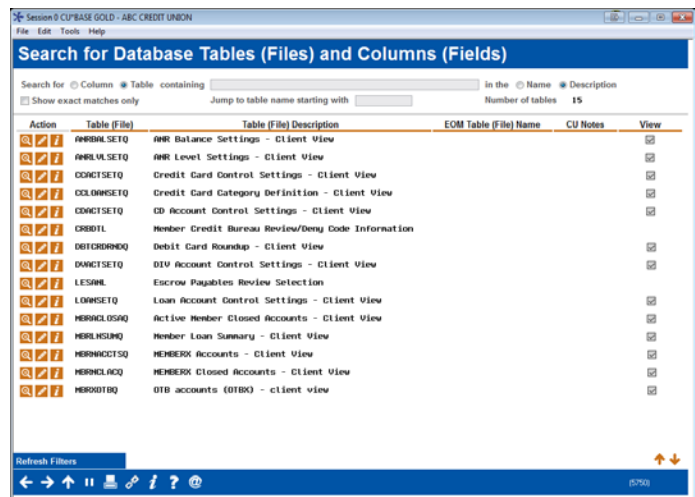
Though Views do the work of heavy string queries, they are far from a fancy query join. They are a selective and intricate software enhancement that we're undergoing at CU*Answers, following the SDLC to deliver desired views that not only assist our internal teams in data usage, but provide solutions to credit unions all the same. Some Views may even require adjustments to programs in order to refine core data. So, suffice to say, we're taking these enhancements seriously.

What Makes a View?

Deciding what data will eventually become a View is a twofold process. We create Views for internal efficiencies; to facilitate APIs, large CU*BASE projects such as the menu rewrite, and behind the scenes reasons to solve technical problems. We also create Views for Data Analysts; creating Views for things that are impossible or very difficult to do with Query, things that are done frequently by many CUs for many reasons, Views that can solve multiple problems, and Views over tables that are particularly confusing or may have unrelated data elements. Essentially, we want to edit our world to work for us in the best way possible.

How Can I See Existing Views?

Tool #332 Database Search Assistant is the perfect tool to see the Views already in use. You can simply sort by the column marked "View" to see all of the checked boxes indicating the table is a view. Check them out!



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