

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

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

MEMBER FACING		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 tool</i>	<i>Sample task</i>	Y	3	2	4	5	<i>This feature will really make processing much easier for tellers.</i>
Its Me 247 Desktop	Please have your employees help you test the text banking feature. From online banking via desktop, see the new button called Transfer Commands. Click this button to set up your text transfers.	Y	5	5	5	5	
Its Me 247 Mobile	Please have your employees help you test the text banking feature. From online banking via mobile, see the new button called Transfer Commands. Click this button to set up your text transfers.	Y	5	5	5	5	
Text banking	Please have your employees help you test out the new commands to transfer from one account to another	Y	5	5	5	5	
It's Me 247	If you have allowed any loan category to make principal only payments in online banking, please have someone try the new functionality from only banking. If not, please have someone try making a payment and verify that it post as expected.						We do not allow principal only payments.

Tool**Task**

Rate each item on a scale of 1-5.

(5 = highest, 1 = lowest)

5 Extremely

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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****E F T****L E N D I N G**

E F T							
L E N D I N G							
476	Review the enhancement to allow a toggle between open and closed date on written off loans. Try out the sort feature by both of these selections as well.	Y	5	5	3	3	
2	Review the option to see the math behind the expense/income ratios in the loan app. Verify that the data displays as expected	Y	5	5	5	4	Nice to see the difference between percentage and dollar amount
476	Check out the written off loan dashboard where you can now toggle and sort by either open or closed date	N	5	4	3	3	Helpful in knowing where our losses are calculated
249	Check the new screen for escrow payee information that shows address and phone on the listing						
249	Enter a payee to see the new flag to automatically advance the policy expiration date. Verify that this is set to Y as the release will default this flag on to advance dates						
570	Check the new address information that now appears on the disbursement screen. If there are multiple collateral records, it will state this instead of the particular address. Confirm that accuracy of this data.						
570	Take this option on an insurance escrow record and verify the new visibility of the flag. Verify that if the flag is checked to advance, it will not allow a date change unless you unlock the field.						

Rate each item on a scale of 1-5.

(5 = highest, 1 = lowest)

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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**

Y/N

1-5

1-5

1-5

1-5

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	
570	Post escrow disbursements and verify that the applicable expiration dates in the escrow and collateral records update appropriately as configured by the new flag						
458	In loan category configuration, view the new “allow principal only payments’ button in the Audio/online banking tab. If possible, choose a category that you will allow members to make principal only payments						We do not offer principal only payments.
458	If you currently offer an Interest Only Line of Credit Product, in loan category definition confirm that Check Box to Switch to principal & Interest Pmt Calc type is presented in the Additional Information, Interest Only Loans- Scheduled Payment Calculation section.						We do not offer interest only line of credit products
465	See the new provider option in the insurance/debt protection configuration. Add the provider information here to allow for more visibility and better analysis options. Note the additional look for this screen as well to give you more information on the first screen.	Y	5	5	5	5	
1996	To configure the new Refi opportunity triggers, use this tool to configure which product you would like to cross sell for each type of trade line	Y	5	5	5	5	
2/53	When processing loan applications review the debt tab to confirm that the Refinance Opportunity Highlight is appearing correctly. The highlight should only appear if the qualifying rate for the linked product is lower than the estimate interest rate of the tradeline.	Y	4	2	5	5	Great resource to use to help members and see what we can offer with our interest rate; Love this

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Are you satisfied with the results you received?
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How likely are you to perform the task after beta?
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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
2/53	When processing loan applications click the 'Calculate the Refi' button and work the calculations. Change Product Codes, confirm that the New Interest Rate returned is correct. Notate an offer made if applicable. Confirm offer is flagged on debt tab.	Y	5	5	5	5	Nice to help members with talking to them on a better rate we can offer if applicable
T E L L E R / M E M B E R S E R V I C E							
Inquiry/Phone	If CU*A processes your checks, view images of cleared checks directly from transaction history! Go to the transaction history, then the additional information screen on the check. Take the new button to display the image desired.	Y	5	5	5	5	Image not clear, would like to be able to print check; would like to have an option to enlarge
Timeout window	Look at the changes in the Spooled report screen. Use the various options to view, delete and move reports to desired location. Use both the individual and multiple selection options	Y	5	4	4	4	
Phone	Review the new phone transfer option to allow payment matrix overrides. If possible, try out the new features and verify the posting results for both principal only payments or those with adjustments to the payment matrix. Verify that the appropriate edits apply to assure that the amounts equal the payment amount selected.	Y	5	5	5	2	
15	If you have a member with a last name longer than the normal field, add the information into the new field on membership maintenance. If you don't have a member with this information, see if there is an account that you can temporarily use to test this functionality along with the steps below.	Y	5	5	5	5	Nice feature but do not run into this issue very often

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Comments/
Explanation of Rating

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		Y/N	1-5	1-5	1-5	1-5	
3	When opening new memberships, add long names into the new field as you're creating the account.	Y	5	5	5	5	Nice to have in case of longer names and we don't have to abbreviate
Inquiry	Inquire on a member that has a long last name entered. Verify that the name is highlighted and that the button allows you to display the full information	Y	5	5	5	5	
Phone	Inquire on a member that has a long last name entered. Verify that the name is highlighted and that the button allows you to display the full information	Y	5	5	5	5	
Teller	Enter a member that has a long last name entered and review the verify ID window. Verify that the name is highlighted and that the button allows you to display the full information	Y	5	5	5	5	
Teller, Misc Advance	Enter a member that has a long last name entered and review the verify ID window. Verify that the name is highlighted and that the button allows you to display the full information	Y	5	5	5	5	
Teller, transfer	Enter a member that has a long last name entered and review the verify ID window. Verify that the name is highlighted and that the button allows you to display the full information	Y	5	5	5	5	

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Tool

Task

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		Y/N	1-5	1-5	1-5	1-5	
1035	For those responsible for tracker cleanup, this is a new tool to mark a batch of follow-ups complete. If possible try out this new feature to allow to clean up old trackers that are no longer needed (most likely sales trackers). Also choose the report option and verify your results. Note: See the management section for another item for cleaning up tracker records	Y	5	3	3	3	If multiple trackers received in one day – transfer option would be to only 1 employee ID – would be nice to be able to transfer from tool #5 and select each one as an option
20	Review the maintenance screen for a credit card account and notice the new flag to turn on credit card rewards. With no program configured, please make sure that it will now allow you to check this feature on an account						We offer credit card rewards through a different system
158	Users will notice a new supplemental Vault type of M for TCM on various supplemental vault screens (we don't want you to build M type vaults, just be aware of this option) Please pay attention to any issues you see when working with existing supplemental vaults especially when adding, editing, or using existing machines.						
Phone	After on-demand ACH posting is activated, use phone operator to move to the pending ACH screen and post a pending ACH credit item for a member. Verify the fee shows as configured and verify that it allows a waiver or not as configured. Review the transaction after posting to make sure it posts as expected with any additional transaction description needed. Verify the fee posting as well.	Y	5	5	5	2	
Phone	Post an ACH credit and waive the fee (if applicable, waiving the fee is a configurable option). Make sure no fees are charged to the members and that the ACH posts correctly.	Y	5	5	5	2	The waived fee report does not have a title on that page that explains what the page details. The other pages all had "Dormancy Fee", "Stop Payment Fee", "Printed Check Fee", etc.

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Explanation of Rating

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
Phone	If possible, post and ACH credit that has distributions set up. Make sure all distributions post as expected	Y	5	5	5	2	
Phone	When posting an ACH item, use the fee lookup to find an account type to post the fee to. Make sure the current and available balances are correct for the account.	Y	5	5	5	2	The verbiage appears to say that the fee is being deposited into a share. I believe the verbiage should be "from" not "to"
Phone	Post an ACH item and charge a fee. Add an optional secondary description for the fee and verify that the description is added to the members account.	Y	5	5	5	2	
M A N A G E M E N T							
271	See the new options for statement style fee waivers based on combined savings/loan balances. If possible, adjust your waivers based on desired selection criteria and verify fees after statement processing.						
777	If you would like to restrict certain products for certain membership designations, go to the new function key in the share account setup to set up restricted membership designations. Once completed, have your staff try opening under those designations to verify that the proper edits are working as expected. Note: Only products not allowed for online purchase will be able to have restriction placed. This can be turned off in Tool 506 if necessary						

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705	To allow cleanup of old tracker notes, take this new option to purge any items that are no longer needed. Even if you do not want to purge records, take the audit option so that you can review and verify the results of your selection. Note: see the member service function for another cleanup option	Y	4	4	4	2	
277	Take a look at the new retention information that shows on the tracker type definition. The actual purge will be rolled out gradually and Asterisk Intelligence will be connection with clients for archival options if desired. However, please review the defaulted retention periods and start thinking about how you might want to manage your retention to ready yourself for this new functionality	Y					
569	Go to online banking configuration and choose the online banking password and security settings. These have now been moved to your access to allow you to control your settings without the need to contact CU*A. Check your settings here to see how they are currently working. If you want to make adjustments, you can do so here.	Y					
569	Go to the text banking configuration to turn on transfers via text banking	Y	5	5	5	3	
777 and 458	When text banking is turned on, configure those DIVAPLS and loan categories where you would like to allow transfers visa this method	Y	5	5	5	3	

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How helpful will the task be to staff?
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Explanation of Rating

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
OPER	Contact CU*A to setup the option to Allow pending ACH items to be posted for individual members.						
569	Once the option to allow pending ACH items to be posted is configured, Setup a fee (it can be 0.00), description, and general ledger for ACH On-Demand Posting. The ACH items will be posted through phone operator						
A U D I T							
1700	Check out the new Teller Audit Analysis Dashboard. This new tool gives the user the ability to see teller transactions for the previous business day up to 3 months without accessing the teller control option! Check out the sorts and filter options to audit transactions in general and search for specific transactions.	Y	5	5	5	5	
369	After month end, review the fee income/waivers dashboard for the new Fee Type of ACHFEE. Verify that the totals charged and waived are reasonable.	Y	5	5	5	3	
B A C K O F F I C E							

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Explanation of Rating

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
986, maintenance	When working with draft exceptions, use the new view check feature to verify your maintenance of the exception item	Y	5	5	5	4	
406 and 993	Access these investment tools to review the new analysis feature on your investment portfolio. Use the various lookups and graphical information for the different data elements.						
S E C U R I T Y A D M I N I S T R A T O R							
D A T A B A S E A D M I N I S T R T O R							
758	Check out the updates screen in the Report Automation for Custom Reports and Files that now compares the saved query definition to the current query definition. Just click/select one of the queries in the list and then click View. If the current query definition differs from the saved definition, you will see a side by side comparison showing you the differences between the two.	Y	5	5	5	2	

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Comments/
Explanation of Rating

Tool

Task

		Y/N	1-5	1-5	1-5	1-5	
1210	Check out the two new types of flood options. Payment/Delinquent Control Option Flood and the Variable Rate Code (Closed End Loans) and Variable Rate Code (Line of Credit Loan). Consult with the Analytics Team before flooding members.						
1980	Review this dashboard to see the new search features and information on file authority. Try out the new Query Table feature to view the table.	Y	5	5	5	2	
1980	Review this option to see the enhancements for more specific information on the size of your libraries. Use the Change scale feature to see the information in all scales	Y	5	5	5	1	
1310	Review this option to see the enhancements for more specific information on the size of your libraries. Use the Change scale feature to see the information in all scales						
817	Review the changes to the skip payment history dashboard. Toggle between interest paid and payment amount. Verify data.	Y	4	4	3	4	Good information to see
1730	Plan out how you would like to track fraud information. Go to this tool to configure the "types" of fraud that you would like to track for analysis						

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Did you complete the task?
Y/N

How easy was the task?
1-5

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

Comments/
Explanation of Rating

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
1720	Plan out how you would like to track fraud information. Go to this tool to configure what statuses you would like to use						
1715	Use this tool to start adding incidents of fraud, either historical or current. This will allow you to keep this data on hand for future analysis						
1710	Use this tool to view all the information on fraud entered in the system.						

GENERAL COMMENTS

Beta Test Checklist

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

Credit Union Name: Pathway Financial

Primary Contact Name: J. K. Thomas

Primary Contact Phone Number: 644-416-7544 x 1230



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(5 = highest, 1 = lowest)

- 5 Extremely
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N/A Not applicable

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How easy was the task?
1-5

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1-5

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

Comments/
Explanation of Rating

MEMBER FACING	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
	Sample tool	Sample task	Y	3	2	4	5	This feature will really make processing much easier for tellers.
	Its Me 247 Desktop	Please have your employees help you test the text banking feature. From online banking via desktop, see the new button called Transfer Commands. Click this button to set up your text transfers.	Y	4	5	4	5	Very cool
	Its Me 247 Mobile	Please have your employees help you test the text banking feature. From online banking via mobile, see the new button called Transfer Commands. Click this button to set up your text transfers.	Y	4	5	4	5	
	Text banking	Please have your employees help you test out the new commands to transfer from one account to another	Y	4	4	5	4	
	It's Me 247	If you have allowed any loan category to make principal only payments in online banking, please have someone try the new functionality from only banking. If not, please have someone try making a payment and verify that it post as expected.						N/A

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1-5

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1-5

How helpful will the task be to staff?

1-5

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1-5

Comments/
Explanation of Rating

Tool

Task

E F T

L E N D I N G

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
476	Review the enhancement to allow a toggle between open and closed date on written off loans. Try out the sort feature by both of these selections as well.	Y	3	4	5	5	
2	Review the option to see the math behind the expense/income ratios in the loan app. Verify that the data displays as expected						N/A - use Mordam link
476	Check out the written off loan dashboard where you can now toggle and sort by either open or closed date	Y	4	5	4	5	Very cool since Ann did it
249	Check the new screen for escrow payee information that shows address and phone on the listing	Y	3	5	4	4	
249	Enter a payee to see the new flag to automatically advance the policy expiration date. Verify that this is set to Y as the release will default this flag on to advance dates	Y	5	5	4	5	
570	Check the new address information that now appears on the disbursement screen. If there are multiple collateral records, it will state this instead of the particular address. Confirm that accuracy of this data.	Y	4	5	5	4	
570	Take this option on an insurance escrow record and verify the new visibility of the flag. Verify that if the flag is checked to advance, it will not allow a date change unless you unlock the field.	Y	4	4	5	4	

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		Y/N	1-5	1-5	1-5	1-5	
570	Post escrow disbursements and verify that the applicable expiration dates in the escrow and collateral records update appropriately as configured by the new flag						Didn't work
458	In loan category configuration, view the new "allow principal only payments" button in the Audio/online banking tab. If possible, choose a category that you will allow members to make principal only payments	Y	4	5	4	5	
458	If you currently offer an Interest Only Line of Credit Product, in loan category definition confirm that Check Box to Switch to principal & Interest Pmt Calc type is presented in the Additional Information, Interest Only Loans- Scheduled Payment Calculation section.	Y	5	4	5	4	
465	See the new provider option in the insurance/debt protection configuration. Add the provider information here to allow for more visibility and better analysis options. Note the additional look for this screen as well to give you more information on the first screen.						
1996	To configure the new Refi opportunity triggers, use this tool to configure which product you would like to cross sell for each type of trade line	Y	4	3	4	4	ML
2/53	When processing loan applications review the debt tab to confirm that the Refinance Opportunity Highlight is appearing correctly. The highlight should only appear if the qualifying rate for the linked product is lower than the estimate interest rate of the tradeline.						N/A

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		Y/N	1-5	1-5	1-5	1-5	
2/53	When processing loan applications click the 'Calculate the Refi' button and work the calculations. Change Product Codes, confirm that the New Interest Rate returned is correct. Notate an offer made if applicable. Confirm offer is flagged on debt tab.						
T E L L E R / M E M B E R S E R V I C E							
Inquiry/Phone	If CU*A processes your checks, view images of cleared checks directly from transaction history! Go to the transaction history, then the additional information screen on the check. Take the new button to display the image desired.						N/A
Timeout window	Look at the changes in the Spooled report screen. Use the various options to view, delete and move reports to desired location. Use both the individual and multiple selection options	Y	4	5	5	5	Much needed
Phone	Review the new phone transfer option to allow payment matrix overrides. If possible, try out the new features and verify the posting results for both principal only payments or those with adjustments to the payment matrix. Verify that the appropriate edits apply to assure that the amounts equal the payment amount selected.	Y	5	4	5	4	We don't get a lot of these requests
15	If you have a member with a last name longer than the normal field, add the information into the new field on membership maintenance. If you don't have a member with this information, see if there is an account that you can temporarily use to test this functionality along with the steps below.	Y	5	5	5	5	People hate typing their NAME

Rate each item on a scale of 1-5.

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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	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	
3	When opening new memberships, add long names into the new field as you're creating the account.	Y	5	5	5	5	I got 15 errors
Inquiry	Inquire on a member that has a long last name entered. Verify that the name is highlighted and that the button allows you to display the full information	Y	5	5	5	5	Shows correct
Phone	Inquire on a member that has a long last name entered. Verify that the name is highlighted and that the button allows you to display the full information	Y	5	5	5	5	
Teller	Enter a member that has a long last name entered and review the verify ID window. Verify that the name is highlighted and that the button allows you to display the full information	Y	4	5	4	5	
Teller, Misc Advance	Enter a member that has a long last name entered and review the verify ID window. Verify that the name is highlighted and that the button allows you to display the full information	Y	4	5	4	5	
Teller, transfer	Enter a member that has a long last name entered and review the verify ID window. Verify that the name is highlighted and that the button allows you to display the full information	Y	4	5	4	5	

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	Comments/ Explanation of Rating
1035	For those responsible for tracker cleanup, this is a new tool to mark a batch of follow-ups complete. If possible try out this new feature to allow to clean up old trackers that are no longer needed (most likely sales trackers). Also choose the report option and verify your results. Note: See the management section for another item for cleaning up tracker records	Y	4	5	3	5	Not a big hurdle step but the way too confusing
20	Review the maintenance screen for a credit card account and notice the new flag to turn on credit card rewards. With no program configured, please make sure that it will now allow you to check this feature on an account	Y	4	5	5	4	This will be nice but it leaves 100% redemption NO breakage
158	Users will notice a new supplemental Vault type of M for TCM on various supplemental vault screens (we don't want you to build M type vaults, just be aware of this option) Please pay attention to any issues you see when working with existing supplemental vaults especially when adding, editing, or using existing machines.						Notes
Phone	After on-demand ACH posting is activated, use phone operator to move to the pending ACH screen and post a pending ACH credit item for a member. Verify the fee shows as configured and verify that it allows a waiver or not as configured. Review the transaction after posting to make sure it posts as expected with any additional transaction description needed. Verify the fee posting as well.	Y	5	5	5	5	This is awesome will be great w/ B
Phone	Post an ACH credit and waive the fee (if applicable, waiving the fee is a configurable option). Make sure no fees are charged to the members and that the ACH posts correctly.	Y	4	4	5	4	

*NO Penalty
MHT*

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	1-5	Comments/ Explanation of Rating
Phone	If possible, post and ACH credit that has distributions set up. Make sure all distributions post as expected	Y	5	4	4	5		<i>None</i>
Phone	When posting an ACH item, use the fee lookup to find an account type to post the fee to. Make sure the current and available balances are correct for the account.	Y	4	4	4	4		
Phone	Post an ACH item and charge a fee. Add an optional secondary description for the fee and verify that the description is added to the members account.							
M A N A G E M E N T								
271	See the new options for statement style fee waivers based on combined savings/loan balances. If possible, adjust your waivers based on desired selection criteria and verify fees after statement processing.	N	5	5	4	5		<i>still not changing how paper posting that way</i>
777	If you would like to restrict certain products for certain membership designations, go to the new function key in the share account setup to set up restricted membership designations. Once completed, have your staff try opening under those designations to verify that the proper edits are working as expected. Note: Only products not allowed for online purchase will be able to have restriction placed. This can be turned off in Tool 506 if necessary	Y	4	3	4	3		

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	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	
705	To allow cleanup of old tracker notes, take this new option to purge any items that are no longer needed. Even if you do not want to purge records, take the audit option so that you can review and verify the results of your selection. Note: see the member service function for another cleanup option						
277	Take a look at the new retention information that shows on the tracker type definition. The actual purge will be rolled out gradually and Asterisk Intelligence will be connection with clients for archival options if desired. However, please review the defaulted retention periods and start thinking about how you might want to manage your retention to ready yourself for this new functionality						
569	Go to online banking configuration and choose the online banking password and security settings. These have now been moved to your access to allow you to control your settings without the need to contact CU*A. Check your settings here to see how they are currently working. If you want to make adjustments, you can do so here.	Y	5	4	5	5	
569	Go to the text banking configuration to turn on transfers via text banking	Y	4	5	4	5	Low IT.
777 and 458	When text banking is turned on, configure those DIVAPLS and loan categories where you would like to allow transfers via this method	Y	5	4	5	5	Ready To Rollout.

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	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	
OPER	Contact CU*A to setup the option to Allow pending ACH items to be posted for individual members.	Y	5	5	5	5	Set up PFLU key from to Post early!
569	Once the option to allow pending ACH items to be posted is configured, Setup a fee (it can be 0.00), description, and general ledger for ACH On-Demand Posting. The ACH items will be posted through phone operator						
A U D I T							
1700	Check out the new Teller Audit Analysis Dashboard. This new tool gives the user the ability to see teller transactions for the previous business day up to 3 months without accessing the teller control option! Check out the sorts and filter options to audit transactions in general and search for specific transactions.	Y	4	5	5	4	- Like it
369	After month end, review the fee income/waivers dashboard for the new Fee Type of ACHFE. Verify that the totals charged and waived are reasonable.						

BACK OFFICE

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	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	
986, maintenance	When working with draft exceptions, use the new view check feature to verify your maintenance of the exception item	Y					No check m type
406 and 993	Access these investment tools to review the new analysis feature on your investment portfolio. Use the various lookups and graphical information for the different data elements.	Y	4	4	5	3	Sharon Bly train for some return
SECURITY ADMINISTRATOR							
DATABASE ADMINISTRATOR							
758	Check out the updates screen in the Report Automation for Custom Reports and Files that now compares the saved query definition to the current query definition. Just click/select one of the queries in the list and then click View. If the current query definition differs from the saved definition, you will see a side by side comparison showing you the differences between the two.	Y	4	4	4	4	Handy

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	Comments/ Explanation of Rating
1210	Check out the two new types of flood options. Payment/Delinquent Control Option Flood and the Variable Rate Code (Closed End Loans) and Variable Rate Code (Line of Credit Loan). Consult with the Analytics Team before flooding members.	Y	4	5	5	5	Hope we get more fields
1980	Review this dashboard to see the new search features and information on file authority. Try out the new Query Table feature to view the table.	Y	5	5	5	5	Woot Woot New Fun from Mr. Shitt
1980	Review this option to see the enhancements for more specific information on the size of your libraries. Use the Change scale feature to see the information in all scales	Y	5	5	5	4	
1310	Review this option to see the enhancements for more specific information on the size of your libraries. Use the Change scale feature to see the information in all scales	Y	4	3	4	4	ARE Limits coming?
817	Review the changes to the skip payment history dashboard. Toggle between interest paid and payment amount. Verify data.	Y	4	5	4	4	good step Review
1730	Plan out how you would like to track fraud information. Go to this tool to configure the "types" of fraud that you would like to track for analysis	Y	5	5	5	5	was he going to use this tool

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	1-5	Comments/ Explanation of Rating
1720	Plan out how you would like to track fraud information. Go to this tool to configure what statuses you would like to use	4	5	5	5	5	5	In process of delivery
1715	Use this tool to start adding incidents of fraud, either historical or current. This will allow you to keep this data on hand for future analysis	4	4	4	5	5	5	Have a group meeting to discuss before using
1710	Use this tool to view all the information on fraud entered in the system.	4	5	5	5	5	5	

GENERAL COMMENTS

Beta Test Checklist

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

Credit Union Name: Shoreline Credit Union

Primary Contact Name: Nathan Grossenbach/Steve Haensgen

Primary Contact Phone Number: 920-482-3765,920-482-3700



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

MEMBER FACING	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 tool</i>	<i>Sample task</i>	Y	3	2	4	5	<i>This feature will really make processing much easier for tellers.</i>
	Its Me 247 Desktop Tyler & Slim	Please have your employees help you test the text banking feature. From online banking via desktop, see the new button called Transfer Commands. Click this button to set up your text transfers.	Y	4	5	3	3	While the idea is convenient and easy, there could be more direction on the site itself. It was easy to set up commands, but if someone did not know the previous general commands, it may be hard for them to figure out how to text with the custom command. (I needed slims help) I feel there may be miscommunication.
	Its Me 247 Mobile Tyler & Slim	Please have your employees help you test the text banking feature. From online banking via mobile, see the new button called Transfer Commands. Click this button to set up your text transfers.	Y	5	5	5	5	After doing the desktop version first, I knew how to do it and it was easy to get it set up and it worked well on mobile.
	Text banking Tyler & Slim	Please have your employees help you test out the new commands to transfer from one account to another	Y	5	5	5	5	While it is easy to use, I am unsure that this will be beneficial to roll out to the members. I do not know that it will be used enough. Especially with our app.

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

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
It's Me 247 Kal & Slim	If you have allowed any loan category to make principal only payments in online banking, please have someone try the new functionality from only banking. If not, please have someone try making a payment and verify that it post as expected.	y	5	5	N/A	1	Not going to allow this.
E F T							
L E N D I N G							
476 Kal/Denece	Review the enhancement to allow a toggle between open and closed date on written off loans. Try out the sort feature by both of these selections as well.	y	5	4	3	3	
2 Kal/CLs	Review the option to see the math behind the expense/income ratios in the loan app. Verify that the data displays as expected	y	5	5	4	4	
476 Kal/Denece	Check out the written off loan dashboard where you can now toggle and sort by either open or closed date	y	5	5	5	4	
249 Kal/Linda/Desi	Check the new screen for escrow payee information that shows address and phone on the listing	Y	5	5	3	4	
249 Kal/Linda	Enter a payee to see the new flag to automatically advance the policy expiration date. Verify that this is set to Y as the release will default this flag on to advance dates	Y	5	5	2	2	
570 Kal/Kay?/Desi?	Check the new address information that now appears on the disbursement screen. If there are multiple collateral records, it will state this instead of the particular address. Confirm that accuracy of this data.	Y	5	5	4	4	

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

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
570 Kal/Linda	Take this option on an insurance escrow record and verify the new visibility of the flag. Verify that if the flag is checked to advance, it will not allow a date change unless you unlock the	Y	4	4	3	4	
570 Kal/Linda	Post escrow disbursements and verify that the applicable expiration dates in the escrow and collateral records update appropriately as configured by the new flag	Y	5	4	3	4	
458 Kal/Slim	In loan category configuration, view the new "allow principal only payments" button in the Audio/online banking tab. If possible, choose a category that you will allow members to make principal only payments	Y	5	5	2	2	Don't want to turn on as I feel it will create more headaches than it will solve.
458 N/A	If you currently offer an Interest Only Line of Credit Product, in loan category definition confirm that Check Box to Switch to principal & Interest Pmt Calc type is presented in the Additional Information, Interest Only Loans- Scheduled Payment Calculation section.	NA					Do something similar for lines so we can set up a draw period and payment and a repayment period and payment.
465 Kal/linda	See the new provider option in the insurance/debt protection configuration. Add the provider information here to allow for more visibility and better analysis options. Note the additional look for this screen as well to give you more information on the first screen.	Y	5	5	2	4	All our coverages are with one provider. If we ever add a new or 2 nd provider then this might be handy.
1996 Kal/Linda	To configure the new Refi opportunity triggers, use this tool to configure which product you would like to cross sell for each type of trade line	Y	5	5	5	5	Setup and tried on existing loan. Have not yet actually tried to create the new refi loan. I have asked my LO's to do so.
2/53 Kal/Linda	When processing loan applications review the debt tab to confirm that the Refinance Opportunity Highlight is appearing correctly. The highlight should only appear if the qualifying rate for the linked product is lower than the estimate interest rate of the tradeline.	Y	5	5	5	5	I like it.

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

2/53 Kal/Linda	When processing loan applications click the 'Calculate the Refi' button and work the calculations. Change Product Codes, confirm that the New Interest Rate returned is correct. Notate an offer made if applicable. Confirm offer is flagged on debt tab.	Y	5	5	5	5	Set up and tried. See 1996 above.
T E L L E R / M E M B E R S E R V I C E							
Inquiry/Phone N/A	If CU*A processes your checks, view images of cleared checks directly from transaction history! Go to the transaction history, then the additional information screen on the check. Take the new button to display the image desired.	N/A					Our Processor is Associated Bank
Timeout window Nathan/Slim	Look at the changes in the Spooled report screen. Use the various options to view, delete and move reports to desired location. Use both the individual and multiple selection options	Y	3	5	2	5	The spools are limited to one or two employees at the credit union, as the process is still relatively complex. BUT the layout makes the process so much easier, and the sort option is so nice to have
Phone Lisa/Sheng	Review the new phone transfer option to allow payment matrix overrides. If possible, try out the new features and verify the posting results for both principal only payments or those with adjustments to the payment matrix. Verify that the appropriate edits apply to assure that the amounts equal the payment amount selected.	Y	3	4	5	4	Instructions weren't very clear. You need to enter transaction info before new features pop up.
15 Lisa/Kelly/Brandon/Rhonda Ever/Steph	If you have a member with a last name longer than the normal field, add the information into the new field on membership maintenance. If you don't have a member with this information, see if there is an account that you can temporarily use to test this functionality along with the steps below.	Y	4	4	4	5	Indicator did not show up via phone operator

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

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
3 Lisa (etc.)	When opening new memberships, add long names into the new field as you're creating the account.	Y	4	4	4	5	Great improvement
Inquiry Lisa	Inquire on a member that has a long last name entered. Verify that the name is highlighted and that the button allows you to display the full information	Y	4	4	4	5	Worked great
Phone Lisa	Inquire on a member that has a long last name entered. Verify that the name is highlighted and that the button allows you to display the full information	Y	4	1	4	5	Did not work in phone operator
Teller Kelly/Brandon	Enter a member that has a long last name entered and review the verify ID window. Verify that the name is highlighted and that the button allows you to display the full information	Y	4	4	4	4	Worked great
Teller, Misc Advance Kelly/Brandon	Enter a member that has a long last name entered and review the verify ID window. Verify that the name is highlighted and that the button allows you to display the full information	Y	4	4	4	4	Worked great
Teller, transfer Kelly/Brandon	Enter a member that has a long last name entered and review the verify ID window. Verify that the name is highlighted and that the button allows you to display the full information	Y	4	4	4	4	Worked great

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

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
1035 Nathan	For those responsible for tracker cleanup, this is a new tool to mark a batch of follow-ups complete. If possible try out this new feature to allow to clean up old trackers that are no longer needed (most likely sales trackers). Also choose the report option and verify your results. Note: See the management section for another item for cleaning up tracker records	Y	5	5	5	5	Very cool! Great for terminated lenders. Nice idea!
20 Kal/Kay	Review the maintenance screen for a credit card account and notice the new flag to turn on credit card rewards. With no program configured, please make sure that it will now allow you to check this feature on an account	Na					This is all handled in PSCU and not in CUA.
158 Nathan/Lisa	Users will notice a new supplemental Vault type of M for TCM on various supplemental vault screens (we don't want you to build M type vaults, just be aware of this option) Please pay attention to any issues you see when working with existing supplemental vaults especially when adding, editing, or using existing	Yes	5	5	5	5	All good, no issues with supplemental's – we have several existing TCR/TCD's.
Phone Slim/Brad	After on-demand ACH posting is activated, use phone operator to move to the pending ACH screen and post a pending ACH credit item for a member. Verify the fee shows as configured and verify that it allows a waiver or not as configured. Review the transaction after posting to make sure it posts as expected with any additional transaction description needed. Verify the fee posting as well.	Y	5	4	3	3	All screens were as expected. Pending transaction was allowed to post on demand, fee amount appeared as set up and posted accordingly.
Phone Slim/Brad	Post an ACH credit and waive the fee (if applicable, waiving the fee is a configurable option). Make sure no fees are charged to the members and that the ACH posts correctly.	Y	5	3	3	3	Checking the "waive fee" box alone did not waive it. Had to check box and hit enter before posting.

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

Phone Slim/Brad	If possible, post and ACH credit that has distributions set up. Make sure all distributions post as expected	Y	5	5	3	3	All distributions were successful
Phone Slim/Brad	When posting an ACH item, use the fee lookup to find an account type to post the fee to. Make sure the current and available balances are correct for the account.	Y	5	5	3	3	The lookup feature allowed the selection of any suffix under that account. Defaulted to the 0000, can it be defaulted to the suffix of deposit?
Phone Slim?Brad	Post an ACH item and charge a fee. Add an optional secondary description for the fee and verify that the description is added to the members account.	Y	5	5	3	3	Test successful
M A N A G E M E N T							
271 Nathan/N/A	See the new options for statement style fee waivers based on combined savings/loan balances. If possible, adjust your waivers based on desired selection criteria and verify fees after statement processing.	Y	5	3	1	1	We do not currently charge for printed statements, but this will be a good thing to keep in mind for the future to weed out the lower-use members.
777 Sara	If you would like to restrict certain products for certain membership designations, go to the new function key in the share account setup to set up restricted membership designations. Once completed, have your staff try opening under those designations to verify that the proper edits are working as expected. Note: Only products not allowed for online purchase will be able to have restriction placed. This can be turned off in Tool 506 if necessary	Y	5	5	5	5	I like the tool as we will be able to limit the products offered to specific membership designations. However, wish it would be able to work for products offered online as well.

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

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
705 Nathan	To allow cleanup of old tracker notes, take this new option to purge any items that are no longer needed. Even if you do not want to purge records, take the audit option so that you can review and verify the results of your selection. Note: see the member service function for another cleanup option	Y	5	5	5	5	I use this tool often for cross sales next suggested product. This cleanup will make it easier to ensure I am doing what is needed with the audit function. Great idea.
277 Nathan	Take a look at the new retention information that shows on the tracker type definition. The actual purge will be rolled out gradually and Asterisk Intelligence will be connection with clients for archival options if desired. However, please review the defaulted retention periods and start thinking about how you might want to manage your retention to ready yourself for this new functionality	Y	5	5	5	5+	Retention of trackers has been a big point of contention for us. I'm not sure if this was a function before, but now that I know of it, it's awesome.
569 Nathan	Go to online banking configuration and choose the online banking password and security settings. These have now been moved to your access to allow you to control your settings without the need to contact CU*A. Check your settings here to see how they are currently working. If you want to make adjustments, you can do so here.	Y	5	5	5	5	Great to see this for the member-side... but when will see this for employees? We've been written up several exams in a row because of the default x1234!
569 Nathan (ASAP)	Go to the text banking configuration to turn on transfers via text banking	Y	5	5	3	4	Members aren't heavy users of text banking, so this won't be a priority right off the bat. Plus most of our members are 60+, and probably wouldn't understand the concept of custom instructions. <i>Very cool tool for those who</i>
777 and 458 Nathan (ASAP)	When text banking is turned on, configure those DIVAPLS and loan categories where you would like to allow transfers visa this method	Y	5	5	5	4	Same as above.

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

OPER Slim/Brad (ASAP)	Contact CU*A to setup the option to Allow pending ACH items to be posted for individual members.	Y	5	5	3	3	Done
569 Slim/Brad (ASAP)	Once the option to allow pending ACH items to be posted is configured, Setup a fee (it can be 0.00), description, and general ledger for ACH On-Demand Posting. The ACH items will be posted through phone operator	Y	5	5	3	3	Done
A U D I T							
1700 Lisa/Sara/Brandon/Kelly	Check out the new Teller Audit Analysis Dashboard. This new tool gives the user the ability to see teller transactions for the previous business day up to 3 months without accessing the teller control option! Check out the sorts and filter options to audit transactions in general and search for specific transactions.	Y	4	5	5	5	Directions need to be more clear to fill in date range if teller didn't run transactions on previous day. Would love this tool to work for current day transactions
369 Slim/Brad	After month end, review the fee income/waivers dashboard for the new Fee Type of ACHFE. Verify that the totals charged and waived are reasonable.	N					Will need to wait until after close of April to review.
B A C K O F F I C E							

Rate each item on a scale of 1-5.
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- 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
986, maintenance N/A	When working with draft exceptions, use the new view check feature to verify your maintenance of the exception item	N/A					Our Processor is Associated Bank
406 and 993 Slim/Brad	Access these investment tools to review the new analysis feature on your investment portfolio. Use the various lookups and graphical information for the different data elements.	Y	5	3	1	1	We currently have 60+ investments, it would take a significant amount of time to create these. If there were an Import from excel feature we would be more inclined to use this.
S E C U R I T Y A D M I N I S T R A T O R							
D A T A B A S E A D M I N I S T R A T O R							
758 Nathan	Check out the updates screen in the Report Automation for Custom Reports and Files that now compares the saved query definition to the current query definition. Just click/select one of the queries in the list and then click View. If the current query definition differs from the saved definition, you will see a side by side comparison showing you the differences between the two.	Y	3	2	2	5	I would like a little more info on this, as I don't fully understand what is being shown here. Based on the narrative on this checklist, it sounds like it will be helpful... but I'm just not noticing any difference.

Tool

Task

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Did you complete the task?
Y/N

How easy was the task?
1-5

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Comments/ Explanation of Rating

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
1210 Kal	Check out the two new types of flood options. Payment/Delinquent Control Option Flood and the Variable Rate Code (Closed End Loans) and Variable Rate Code (Line of Credit Loan). Consult with the Analytics Team before flooding members.	NA					
1980 Nathan	Review this dashboard to see the new search features and information on file authority. Try out the new Query Table feature to view the table.	Y	5	5	4	5	Limited use tool, but it is great to view the file, the date last used in one screen. I wasn't sure of a way to do this before, if it even was possible.
1980 Nathan	Review this option to see the enhancements for more specific information on the size of your libraries. Use the Change scale feature to see the information in all scales	Y	5	5	4	5	Great tool for me to use, or maybe our IT tech. Best part is being able to view and delete right from this screen those larger, unused files.
1310 Nathan	Review this option to see the enhancements for more specific information on the size of your libraries. Use the Change scale feature to see the information in all scales	Y	5	5	2	3	It's good info to manage, but I'm not sure what the applicability is. Do we have limits on how much storage we can have? Does the larger size impact the
817 Kal	Review the changes to the skip payment history dashboard. Toggle between interest paid and payment amount. Verify data.	NA					We have not allowed this as of yet.
1730 Lisa/Slim	Plan out how you would like to track fraud information. Go to this tool to configure the "types" of fraud that you would like to track for analysis	Y	5	5	5	5	Easy to Create Types of Fraud

Tool

Task

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N/A	Not applicable

Did you complete the task?
Y/N

How easy was the task?
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1720 Slim/Lisa	Plan out how you would like to track fraud information. Go to this tool to configure what statuses you would like to use	Y	5	5	5	5	Will be useful in tracking stages of each fraud case
1715 Slim/Lisa	Use this tool to start adding incidents of fraud, either historical or current. This will allow you to keep this data on hand for future analysis	Y	5	5	3	3	Interesting tool, will take time to build the parameters and what not around it. But, could definitely see this being used.
1710 Slim/Lisa	Use this tool to view all the information on fraud entered in the system.	Y	5	5	3	3	See above, future need for sure!

GENERAL COMMENTS