



# May 2022 Monthly Recap

The Owner's View Monthly 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 Owner's View Monthly Recap covers programming changes implemented during the month of May.

## Architectural Changes

- 58573 Improved user experience with application tuning.

## EFT Modifications

- 57773 Mandate: STAR is requiring minimum daily spend limits on AFT's for Cash Apps. Removed these transactions from daily limit checking.
- 57983 Modified the call program for batch maintenance for new APBatch4 format to be separated out by vendor.
- 58746 Corrected the limit being placed on APBatch4 Maintenance build file for both CO-OP and PaymentsOne.
- 58355 When issuing a credit card from CU\*BASE ensure the default stock code carries through the stock code and card class code. This affects only Fiserv clients.
- 58830 Changed the library the CO-OP shared branching data queues reside in.
- 57195 Modified the 1port management tools to start port jobs as user ISOOPER vs iSeries user's profile requesting the program.
- 58479 ISOCUVND was modified to ensure that newly converted credit unions do not have zeros for last maintenance date as this causes batch maintenance to be sent for up an entire month.

## Enhancements

- 53110 Nav 3.0, moved OPER menus to new tool database.
- 53111 Nav 4.0, moved Ops menu to a new Ops Center tools database.
- 53396 Allow maintenance to online banking membership promotion code.
- 54396 Added activation flag to CU bill pay product configuration.

- 54487 & 55637 Updated the CU\*BASE/GOLD login process to populate API identifiers on a CU\*BASE screen for GOLD to show recent contact information (trackers).
- 54536 Added large size loan request/application screens.
- 54946 New Maximum Earnings Sweep BizLink Product.
- 55229 New Share Secured Loans in Online Banking.
- 55272 ISO File Utilization – New MCC groups analysis Dashboard.
- 55515 Added Tracking Recoveries on Written-Off Loans.
- 55599 Card Optics Lite Dashboard.
- 56445 Xpress Teller – New teller limits.
- 57048 Membership Designation controls for Currently serving primary member.
- 57120 Created new program to send statement (Member, Credit Card, or Mortgage) to SAGE.

## GOLD Screen Modifications

- 55918 Loan Recap Screen Design Changes: GOLD-only layout changes to accommodate future integrations expansion.
- 57669 GOLD adjustments on Potential Loans to be Sold panel.
- 57685 Removed Select Buttons for Dealer and Loan category fields from the Work/View Dealer Member Loans Screen in Member Inquiry.
- 57804 GOLD adjustment on the Check Processing Stats screen to shown highlight from host screen.
- 57895 Added "View U/W Limits" label to appropriate button in **Tool #458: Loan Category Configuration** and its View-Only counterpart, **Tool #953: View Loan Category Configuration**.
- 57921 Teller Drawer Control error message indicators are now visible on GOLD panel fields.
- 57969 Adjustment to allow employee to utilize New Application button after coming out of Phone Operator.
- 57991 Adjusted color in GOLD loan app queue - Decision/Action column.
- 58092 Updated URL Script for OPER Online Help.
- 58117 Corrected GOLD Panel 3852 where the word 'business banking' is cut off for the 'allow multi-logon business banking' option and where the default check box is not aligned for the 'allow single-logon business banking' option.
- 58159 Corrected the GOLD button for Add/update on the mortgage BOY balance maintenance program to the correct function in CU\*BASE.
- 58192 Removed Xtend Shared Branching link on the GOLD Network

- Links window.
- 58263 Corrected the "Membership Designations and Related Procedures" Icon in Member Inquiry/Phone Operator for CTE Credit Unions.
- 58312 Correction to one of the Nostradamus config panels.
- 58361 Remapped back arrow on the share dividend details pop-up window in Rate Inquiry.
- 58439 Corrected Tiered Services Peer Analysis summary screen in Gold.
- 58571 Corrected the Large and X-Large screen formats in **Tool #2: Work/View Loan App Status** to not replicate the loan queue.
- 58577 Adjusted the Default printer field causing an error when running **Tool #606: Post Corp Draft Recon**.
- 58596 Updated URL for the CU Online University link in the Network Links button.
- 58659 Corrected GOLD visibility on the Loan Category config screen for the "Apply stepdown" flag.
- 58737 Corrected the Chart Analysis Displays in **Tool#1670** to accurately depict "Selected Loan Count" figures.
- 58760 Eliminated duplicate 'Verify My ID' button when accessing Phone Operator via Teller Processing for an Xtend Shared Branch Account.
- 58872 GOLD will now show correct CU ID at lower right of panel even if the CU config is missing.
- 58883 New CTE Library Build.
- 58912 Modified **Tool #697: Products & Services Per Member** to Accurately Display April's Data for Products Per Member.
- 58913 Develop GOLD over the screen used by conversions to reset teller files.
- 58930 Corrected GOLD error when accessing powerline and web version.
- 58973 Updated Remaining CU\*BASE Links to New Help URLs.
- 58980 Change OPER/Ops home page GOLD panels to default to size S in cases where no size indicator exists on host.
- 58983 GOLD "Credit Report Summary Exists" warning uses X/Blank checkboxes instead of Y/N.
- 58985 Changed the button on the inquiry for balloon loans to call the balloon information rather than the delinquency info on the loan.
- 58987 Removed "Invalid array dimension" error in script "PHONEKEY" in GOLD Phone Op panel.
- 58989 Corrected the GOLD panel on the 'Assets' tab on a Loan Application for a single borrower to not display the 'Show Co-Applicant' button. This is for large size panel only.
- 58990 Corrected the GOLD Panel for the Collateral Identification Screen

for Collateral Types using the 'Real estate' type where the screen IDs are UNCLA-B.

- 58994 Updated the 'Change Employee Password' screen to include the messaging to the user.
- 59001 Adjusted the display in the large screen to pick up any records on the second page of the subfile on the host screen.
- 59002 Eliminated potential GOLD script collision when displaying tools on Ops Home or Ops Production Center Home.

## Modifications

- 57809 Added flood zone indicator to the State National CPI file extract.
- 56633 Updated Tool programs to allow for libraries to be named TRAIxx.
- 57315 Eliminated error when first Payment date is in the future where it had a pivot date issue.
- 57391 Eliminated error in posting of Patronage Dividend.
- 57938 Expanded the summary fields in the Loan Skip Payment report to eliminate error messages when fee total exceeded maximum allowed
- 58112 Removed the state exceptions from printing on a report for 1099/1098 and 5498 programs.
- 58414 Program modification to check for and stop the display of duplicate TCL accounts with joint owners.
- 58608 Corrected GA parms on programs.
- 58744 Modified card status controls to allow member activation for additional different reason codes with FISERV.
- 52913 Updated table descriptions on multiple tables including MEMBER and TRANS table.
- 54621 Expanded loan purpose and security code to alpha-numeric to allow more codes.
- 55171 Changed the Counter Offer Exchange URL to be configurable.
- 55770 Enhancement to wrap-up code to allow standard tracker note Content.
- 56515 Added visibility of print trial balance on "Subsidiary Trial Balance" screen.
- 56823 Changed verbiage in loan account listing from charge-off to written-off loans.
- 56830 Added internal maintenance tool for GL configuration for vendor clearing.
- 56863 Updated the Application Type screen to list valid options for Dividend Calc Type, First Div Pymt, and Div Pymt Freq.
- 57293 Removed vendor/processor fields from credit card screens.

- 57305 Expanded VAU display for old card number to show more than nine card numbers.
- 57321 Correction to save function on misc. household details.
- 57376 Added option to sort subsidiary trial balance by branch.
- 57394 Added screen ID to assist with help on Accounts Payable Invoice Detail screen.
- 57426 Added long last name field to name/address maintenance screen.
- 57484 1Click Credit Card processing is no longer writing an interest rate to the MEMBER6 table.
- 57858 Changed program that maintains member comments to stop locking record that interrupt other processes.
- 57925 In **Tool #458: Loan Category Configuration**, added an edit when initially configuring a loan category if 'Business Unit' is selected to say 'Save Business Unit Before Configuring'.
- 57933 Updated tax file utility program to include file IR1099NC01.
- 58015 Xpress Teller Enhancement: Added IRA/HSA Post Codes for Checks and Money Orders.
- 58095 On the receive of the FiServ Memo Post file, combined multiple incoming files in the GA project and not the CL program.
- 58116 Total fields on tax dashboard were expanded for CUs that have a lot of mortgages.
- 58423 Updated ISOCTL3 Configuration to allow entry of 8-digit BIN length.
- 58441 Changed the A2AFT transactions to populate PPD or WEB depending on the source of the transaction and adjust stand-in programs to recognize the appropriate status of the transaction.
- 58579 Correction to aggregate adjustment field on closing disclosure forms.
- 58660 Created a new wrapper program to handle the daily prep for pre-conversion CU training libraries.
- 58771 Created monthly process to delete Kasasa monthly Nonqual and Credits files from the Kasasa server.
- 58798 Modified powerline and web version buttons to show improved marketing content.
- 58875 Programmed CU\*Answers IP share draft and ACH translates.
- 57428 Adjusted the suffixes displayed on the teller audit analysis dashboard to reflect properly for those audit keys not assigned to a particular suffix.
- 57530 Added an edit to ANR config screen to ensure trans description is not left blank.
- 57781 Fee waiver record is now writing out the account type when processing a money order in teller processing.

- 58786 Refunded interest from Payrailz will now display on the exception report.
- 58971 Monitor added for hyphenated long last name in Member First Loan OTB information file.

## Warranty Modification/Adjustment

- 57526 Adjusted single/joint file insurance so that maximum loan term will not prevent subsequent election for coverage of eligible loans.
- 58609 Corrected display of Non-Member credit scores in loan application summary screen.
- 58773 Restored purged loan request records.
- 57377 Change to allow months remaining to be zero when adding new subsidiaries with a salvage value.
- 58774 Updated loan request purge to include CU ID# and only show 1Click offers to member if all records needed are in place.
- 55263 Adjusted display of score factors for Vantage on credit report screen.
- 57544 Added Co-Applicant Comments function back to the Miscellaneous/Comments screen in **Tool#2: Work/View Loan Application Status**.
- 56241 Updated Xtend Shared Branching to display the correct debit card detail within Card Activity and Maintenance screens.
- 56553 Change to utilize 6-digit codes for list format in self-directed flood program.
- 57051 Updated UDM Floods to make existing option 'Pull from my table' functional on UDM date fields.
- 57087 Eliminated a possible issue with Audit key for CASH BACK timestamp.
- 57333 Added warning message when processing a money order over \$1,000.00 in Xpress Teller.
- 57553 Prevented duplicate records from appearing on **Tool#477: Loan-to-Value Analysis Report**.
- 57583 Changed the phone misc. receipt posting to write the business date properly to the transaction file.
- 57607 Corrected **Tool #574: Package Loans to be Sold** to Avoid Program Errors When Selecting Packages.
- 58007 New Member Online Banking Use Report will now list new members if their Open Date and PC Indemn Date are the same date.
- 58035 Corrected Delete process in the tax order maintenance program

- 56681 to perform deletion of CUs at Site-Four.  
Corrected how monthly expense calculates when building pre-existing prepaid subsidiaries.
- 57527 Adjusted Xpress teller to eliminate an edit message if the teller default does not equal the vault configured on their workstation.
- 58082 Data is no longer ghosting from previous records when filtering by name in the accounts payable vendor tool.
- 58356 Adjusted logic to assure that mortgages opened and closed in the same tax year report correctly for 1098 reporting.
- 58440 Maintenance performed to the REG E Opt in/out changes via online banking will no longer report under the Red Flag Processing.
- 58832 Verify offer cross reference records exist for 1Click offers during offer acceptance.
- 58975 Corrected display of CU# on the new OPER home page when working with a Site-4 credit union.