Tool Changes

Revised May 1, 2023
*Added new obsolete tools || Added RDC tools moved from OPER to CU*BASE*

Product:	Version #:	To be released to:	On date:
CU*BASE® GOLD	**23.05**	Online CUs	**May 7, 2023**
		Self-Processors	**May 21, 2023**

ATTENTION CREDIT UNION SECURITY ADMINISTRATORS

With each new release, take a look at the brand-new tools being introduced and assign them to the appropriate employees once the release goes live. To find the new tools introduced in the most recent release:

From the Home Page:

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

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

In Employee Security:

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

NEW TOOLS IN THIS RELEASE

Tool #	Tool Title	Short Description
1033	My CU's Vendors and Services	View processors and services specific to your CU
1874	Work ACH Suspense (Invalid Accounts)	Work PACHSU exceptions
1032	Expense Credit Card Pymts to AP Vendors	AP tool specifically for internal CC payments
1784	Corporate ID Maintenance	Maintain corporate IDs
1783	Maintain GL Budget Groups	GL Budget Groups now separate from Chart of Accounts Maintenance
1026	Bill Pay/P2P Vendor GL Configuration	Separate bill pay and P2P GLs
1027	View Bill Pay/P2P Vendor GL Config	View the bill pay and P2P GL configuration
1655	RDC Enrollment Configuration	Manage RDC enrollment configurations *These tools will be available for your credit union now, but will only be used once RDC auto-enrollment is activated for your CU.*
1656	View RDC Enrollment Configuration	View RDC enrollment configurations *These tools will be available for your credit union now, but will only be used once RDC auto-enrollment is activated for your CU.*

TOOL CHANGES IN THIS RELEASE

Tool #	Tool Title	Change Made
2305	What's New in CU*BASE?	Updated tool # to current release
176	Branch Office Description/Modeling Ctrls	New name: **Branch Office Configuration**
297	Create Escrow Analysis	New name: **Create/Preview Escrow Analysis**
974	View/Audit Promise Deposits Activity	Tool obsoleted
987	Work Pending Promise Deposits	Tool obsoleted
367	Executive Study Group Feedback	Tool obsoleted

TOOL CHANGES: CU*BASE OPERATOR EDITION

For self-processing credit union clients only.

To adjust access to these tools:
1. Navigate to OPER, and use **Tool #5608 Assign OPER Tools to DC Employees**
2. Use the *Search for* field or enter the *Tool #* in the respective areas.
3. Select the tool and then use *Assign to Employee* to select which employees should be assigned the tool.

NEW TOOLS IN THIS RELEASE

Tool #	Tool Title
5491	Bill Pay Product Conversion
5492	P2P Product Conversion
5490	Configure CUs for Consolidated Reporting

END