

Converting GOLD IDs

Introduction

Expanding CU*BASE device names is one of those projects that occur after years of doing something one way, but over time and with an ever growing number of credit unions in our network and the pure increased size of some credit unions, and now a new device naming method is needed. CU*Answers has established a new device naming methodology that all credit unions will convert to during 2016/2017. The new standard is CCBBXNN where:

- CC is the CU ID
- BB is the branch location
- X is the device type
- NN is a sequence number

As everyone knows, CU*BASE is a parameter driven system, where credit unions can define different settings to dictate how their CU processes. There is a global parameter for each CU that indicates the length of device names for their CU. What this means is that when we change the device names for a given credit union, every device must be re-named at the same time. This obviously means that there must be good planning and communications with each credit union to ensure a smooth transition to the new device naming standard.

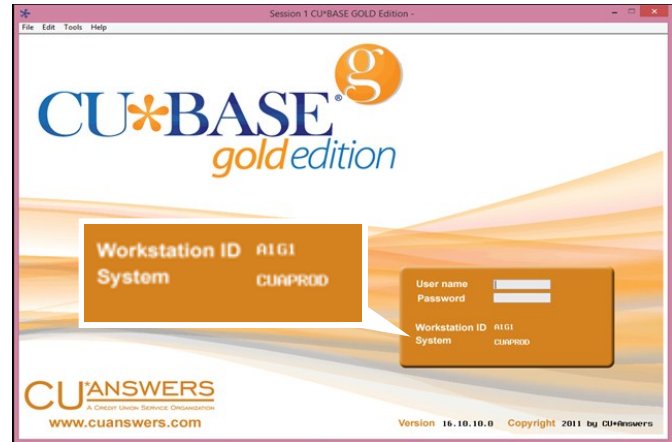
CU*Answers will work with each CU to prepare them for the conversion process. On the morning of each credit union's scheduled changeover, we will run the actual process to create and convert the new expanded device configurations in CU*BASE and to update the GOLD information at each workstation. Then the following steps need to be performed on every workstation and printer prior to the devices being used. These steps are relatively easy and must be shared with all staff so they know how to prepare the workstation prior to going to work that day.

Reboot your workstation

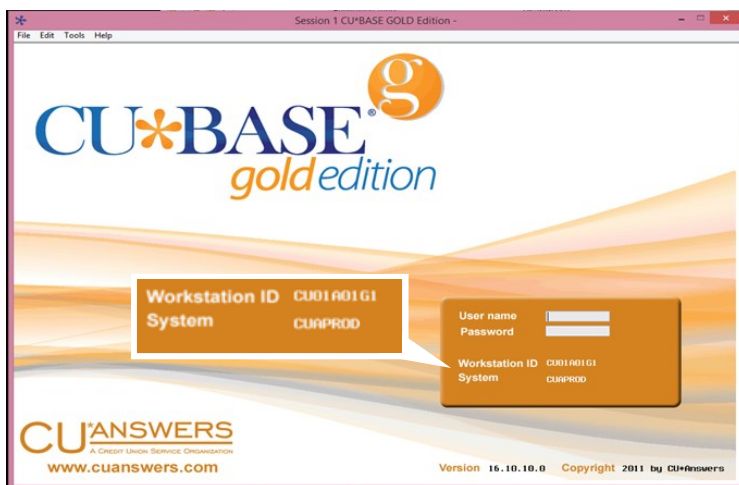
- 1) To ensure that no instances of GOLD or Print sessions are running on the workstation, first reboot the workstation.

Launch GOLD

- 2) The first time you open GOLD after the update you will likely see it update and then load up the Login Screen. The "Workstation ID" will still reflect the old shorter device name.
- 3) Once here, exit your GOLD session completely and then re-launch it. This time you should see a command prompt flash briefly on the screen once you are at the login screen. DO NOT login at this point just yet. Close out of GOLD one more time.

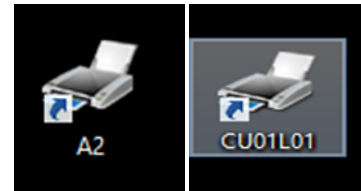


- 4) Launch GOLD for the final time and you should now see a 7 Digit Workstation ID on the login screen as shown below:



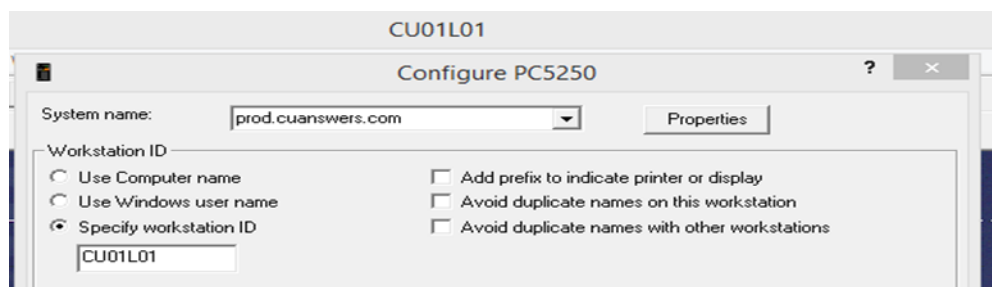
Verify Print Sessions

- 5) During the conversion, you might have noticed that any print session icons on the desktop have been renamed:



NOTE: If the print session icons were labeled something other than just the print session ID, then the icons will not be renamed. It is recommended that you do this manually by right-clicking the icon and selecting the rename option.

- 6) As mentioned above, it is possible that the Icon name was not changed if someone had renamed it at some point to anything longer than 2 characters. You can verify that the print session ID has changed by launching the print session and checking the title bar or by looking in the Communications > Configuration menu:



- a) If for some reason the Print Sessions weren't converted, please call the Network Services Help Desk for assistance. We can either manually convert the ID or help create a new print session with the correct 7 Digit ID.

Testing

- 7) Once the IDs have been converted, test logging into GOLD and all print sessions, and verify that they all connect correctly.
- 8) Test printing receipts, reports and loan forms.
- 9) Once testing is completed, we recommend replacing any labels you might have on workstations or printers to reflect the devices' new 7-digit ID.

Troubleshooting

10) Things to look for if the conversion tool isn't working:

- a) Is your workstation looking for updates from the right Guapple? Check the cubase_launcher.xml file located in the C:\Cubase directory and verify that the IP address in the <Guapple> entry is correct. If you are unsure of what the IP Address should be for this entry you can find this information at <https://updates.cubase.org>. Simply find your credit union in the list provided when you first visit the page, then note the IP address associated with your current branch or location:

Main

(GUAPPLE, 192.168.1.14)

CU*BASE Install: [Click here](#)

IBM System i Install: [Click here](#)

- b) Is there a file called customflatXX (XX being your Alpha ID) under the C:\cubase\cubase\resources folder? This file is used by the converter tool and is crucial for it to work. If it is missing then you likely haven't received the right GOLD updates just yet. Reboot the workstation and verify the Guapple settings mentioned in the step above.

- 11) If the cubase_launcher file is configured correctly, the customflatXX file is present, you have closed out of GOLD and opened it multiple times, the workstation has been rebooted multiple times and it still hasn't converted the workstation to 7 digits you can try manually running the converter tool. This can be done by double-clicking on the 5to7Project.exe file located in the C:\cubase\cubase\resources folder. (Note: The name of the file is the same if you are converting from either 2 or 5 digit IDs.)

If after running through all of these troubleshooting steps the workstations are not updated or you are having any issues, please give us a call at 800-327-3478 x266 and we can assist with converting the workstation and printer IDs to 7 characters.