

## Checklist for Certifying a new Operating System for use with CU\*BASE™ GOLD

Revised November 8, 2021

### Purpose

This document outlines a typical set of procedures used to evaluate a new Microsoft Windows operating system for use with CU\*BASE GOLD and its related software tools.

### A Message From Dave Wordhouse, CU\*Answers EVP Technology

When is it safe to buy a PC with a non-CU\*Answers certified Windows operating system? Define “safe.”

With most new operating system versions, there are always early adopters among credit unions and even our own staff at CU\*Answers that are using the new O/S ahead of any formal certification process. In most cases these new PCs work just fine. But that’s not the same thing as being “certified” for every function that CU\*BASE solutions require.

So we always have a disclaimer when a credit union purchases ahead of formal certification: some element of the new operating system may need to be addressed, since potential conflicts have not yet been ruled out.



In many cases it’s not CU\*BASE functionality you need to be the most concerned about, so think it through. What other software does your team use every day, with or without CU\*BASE? For example, have you validated with eDOC or CU\*Answers Image Solutions that your imaging solutions are ready for the new operating system? You also need to consider things like drivers for your printers and other ancillary devices.

Does that make you feel unsafe in buying some trial machines and testing it for yourself? If your answer is yes, then wait for a certification. If you’re not bothered by that, then move forward with an in-the-field certification of your own...and let us know what you find!

### Testing Checklist

*This list is intended to illustrate the scope of all the areas that need to be reviewed when evaluating a new operating system. It is based on testing from prior upgrades and may not be a complete listing of verifications that would actually be completed during certification of any given upgrade in the future.*

Pass/Fail	Testing Task
	Located on all screens
	Back Arrow
	Forward Arrow
	Cancel
	Timeout
	Print
	Network Links
	Online Help

 Help
 Answer Book
On the CU*BASE Home Page
Inquiry
Custom Menu
Loan Quoter
Main Menu
Phone Operator
Preferences
Rate Inquiry
Sign Off
Member Service Tools
Posting
Credit union look up
Dollar amounts formatting correctly
Last ten accounts
Function keys
Printing forms correctly
Viewing credit reports
Run member through the blocked persons database
Pop Ups
Dollar amounts formatting correctly
Miscellaneous
Accessing CU*Answers Website from login screen
Page up/down buttons on multiple screens
Color schemes match
Email address links
URL Links
Security
Exporting reports to QUERYXX library, for Member Connect
Graphs on analysis dashboards
Exporting to Excel
PDF exports
Printing
Checks
Notices
Misc. Member Account Forms
Loan Statement Notices
Loan Coupons
Print auto/mail checks
Reports/Queries
Member Connect

Master library of Talking Points, procedures, sales info...
eStatement enrollment
Pulling credit reports
CU*Spy reports, statements, and other documents
<b>Operations Tools</b>
Postings for ACH, Checking, Payroll
CU Configurations
On-Demand Processing
Statement Processing
BOD/EOD/EOM
Changing of process date
<b>Custom Loan Forms</b>
Verify Custom Screens
<b>Print Forms</b>
Loan – Letter
Loan – Legal
Application – Letter
Application – Legal
Member (share) – Letter
Member (share) – Legal
WCUL forms
CU*BASE Application
CU*BASE Worksheet
Blank forms
<b>SearchLink (fetching archived document images)</b>
Verify ID
Inquiry
Teller
Phone Op
e-Receipts
Inquiry
Phone Op
Teller Audit
<b>iDocVault (accessing the document archive)</b>
Retrieve IDs
View IDs
Retrieve Receipts
View Receipts
Print Receipt
<b>ProDOC (scanning document images)</b>

	Receipts
	Signature
	Fields display on left
	Correct data in fields
	Print
	Print with signatures
	Print without signatures
	Print original files
	Masking
	Logo
	Signature
	Imaging Solutions Forms
	Print
	Pending
	Save
	Cancel
	Signatures

## Related Materials

Following are related Best Practices that should also be reviewed. All are available via <http://www.cuanswers.com/resources/best-practices/>.

- [CU\\*BASE Network, Hardware, and Training Specifications](#)