

\$400 monthly
value* **FREE**
to all online
clients!

A Simulated Training Environment: Bedrock CCU

Bedrock Community Credit Union is a shared training resource that lets credit union employees practice using CU*BASE features, without risk to live credit union data. Available to all online credit unions free of charge, Bedrock can be accessed by logging in via special CU*BASE user profiles.

Bedrock is set up just like a real credit union, but without links to outside vendors. As a shared resource across all CU*Answers online clients, "members" can be added, modified, and used for practice transactions by any credit union employee. Configurations are generic, using settings typical to most of our clients, and access is limited to basic member service, lending, and accounting functions.

Whether introducing new employees to CU*BASE or helping existing employees practice new skills, the Bedrock Community CU training environment is perfect for keeping your team up to speed on the tools they'll use every day to serve your members.

**Compared to normal monthly and start-up fees for the Custom Training Edition; see separate brochure for details.*

Getting Started

6000 28th Street
Grand Rapids, MI 49546

(800) 327-3478 x255

cuanswers.com



Supported Features

Using a special login ID that will be provided to your credit union, employees can practice using CU*BASE tools in the following areas:

- Teller and Member Services (including opening and closing memberships and accounts, teller posting, account adjustments, transfers, and related features)
- Member Inquiry, Phone Operator, and membership and account maintenance functions
- Loan Processing (including all loan application functions and disbursements)
- Collections Processing (including Tracker setup and maintenance)
- General ledger and other accounting functions (including ACH and payroll maintenance, subsidiaries and investments)
- ReportBuilder and most management dashboards

CU*Answers reserves the right to restrict access to any configuration or other feature deemed necessary to protect data or avoid conflicts with specific software functionality. Restrictions and limitations are outlined elsewhere in this brochure.

Unsupported Features

Because Bedrock is shared by all online CUs, there is potential for an employee to inadvertently enter some real member information into the database. Therefore, the environment is strictly limited to protect all data from external exposure:

- No 3rd-party integrations or file exchanges (such as ATM, ACH, bill pay, etc.)
- No ordering of ATM/debit or credit cards
- No bill pay enrollment
- No processing of draft or ACH returns
- No credit report pulls or indirect lending
- No data downloads or uploads
- No shared branching
- No Member Reach emails
- No access to **It's Me 247** or CU*Talk
- No printing of receipts, notices, loan forms or checks
- No custom forms
- No access to OPER menus
- No integration with ProDOC
- No data backups or Disaster Recovery services
- No access to employee security controls
- No access to any configuration functions



Understanding the Simulated Training Environment

Keep these things in mind when deciding how you will use Bedrock CCU in your training efforts:

- **Shared database** - The same training library is shared by all online credit unions; any accounts your credit union sets up will be visible to other credit unions. Please do not use real names, Social Security numbers, addresses, phone numbers, or other data that could identify a real person. You may choose to use a unique naming convention or reference number to help identify your own accounts if you wish.
- **Generic product configuration** - Because the library can be used by everyone, share, certificate, and loan products are set up to mirror typical configurations; they may not exactly match your own credit union's product offerings.
- **Printing and imaging** - Printing and image archival/retrieval features are not supported. Any reports that are generated are sent to a temporary output queue that will be cleared each day.
- **Daily and monthly processing** - Just as with our live credit union files, normal daily (EOD and BOD) and monthly (EOM) processes will be run on the Bedrock Community Credit Union files, strictly for the purpose of keeping dates in synch, handling teller drawer closings, and to handle other routine processing requirements. Reports generated by daily/monthly processes will not be retained.
- **No backup or disaster recovery** - No daily backup is made of training files and Bedrock is not included in our normal disaster recovery procedures. Although it is rare in practice, CU*Answers reserves the right to refresh Bedrock CCU data at any time without warning.
- **Month-end files for dashboards** - Just like our production libraries, Bedrock retains the current month plus three previous month-end files.
- **External connections** - Third-party vendor interfaces and outside communications channels (such as email, online banking, audio response, etc.) are blocked.

Security and Employee Access

Access to Bedrock CCU is controlled through the use of two special CU*BASE user profiles (such as TRAINxx1 and TRAINxx2, where xx is your CUID) assigned to your credit union. Employees will launch the same CU*BASE GOLD icon they use for their regular work, then log in using one of the special IDs. Once logged in, employees will use one of two specific Employee IDs to access CU*BASE menu options and features. These special IDs have limited access; no configuration settings or other parameters can be changed.

Third-party vendor interfaces and outside communications channels (such as email, online banking, etc.) are blocked. Printing and image archival/retrieval features are not supported. Any reports that are generated are sent to a temporary output queue that will be cleared each day.



Perfect Partners

Exercises for Success Workbooks

Designed for use with Bedrock Community Credit Union, this workbook series provides additional practice for performing common CU*BASE functions and is a great way to reinforce CU*BASE training among new staff. For more information on our Exercises for Success workbooks, visit www.cuanswers.com/resources/edu/simulated-training-environment/

Online Banking Practice Accounts

To experiment with **It's Me 247** online banking or mobile web features in a safe, shared demo environment, visit www.cuanswers.com/resources/doc/its-me-247-reference/ and click the "Access a practice account online" link.

Client Support Services

Getting Started

To access Bedrock, an employee simply launches CU*BASE as usual and logs in with one of the special training IDs assigned to your credit union. Contact anyone on the Client Services & Education team and ask about what IDs your credit union should use.

Beyond Bedrock: The CU*BASE Custom Training Edition

Want a more private environment, just for your team? For a fee, you can have a copy of your own membership data set up as a training environment, available only to your employees. For details about the CU*BASE Custom Training Edition (CTE), including a chart comparing CTE features to Bedrock, see the separate flyer.

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