December 7, 2010

Introduction to CU*SPY e-Statements and Daily Reports

The CU*SPY Online Report and e-Statement Retrieval system makes viewing member statements and credit union reports easy and flexible for both your staff and your members.

This Internet browser-based tool is simple to learn and use — and the graphical interface produces a high-quality visual of your reports. Member statements are easy for the member to read and include the credit union logo.

CU*SPY e-Reports

Access for reports is available via options on the CU*BASE Time-Out window, on menus MNRPTA and MNRPTC, and via the Speed Sequence SPYRT. These commands will launch your computer's Internet browser and move to our secure CU*SPY archive to launch the initial screen. From there you can use the Search tools to narrow the results to the specific desired report, and then either view the report online or print the report.

Reports are stored online for a period of 90 days.

CU*SPY e-Statements

Access to member statements is via the F20-Statements key in CU*BASE Phone and Inquiry software. Members who are enrolled in e-Statements can access them through the e-Statements ic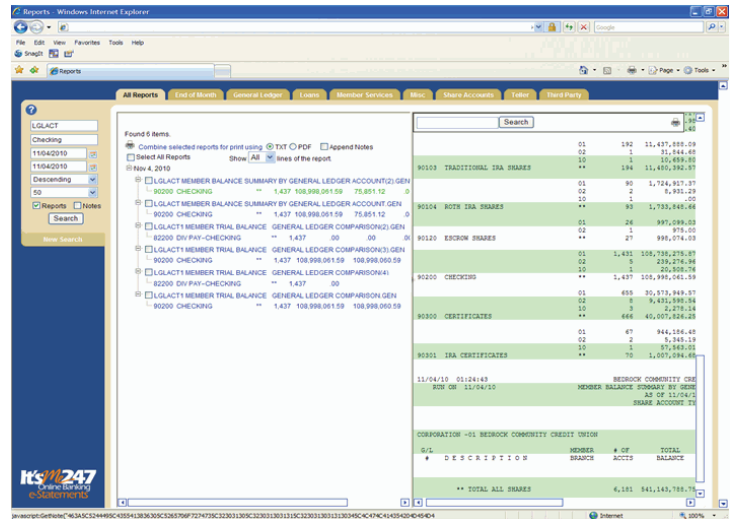on across the top of the main bar in **It's Me 247** online banking. The initial jump screen for members displays the types of documents that can be viewed by the member (standard account statement, credit card statement, or teller receipt analysis). Credit union employees will move directly to view all statements.

Statements are retained online for a period for eighteen months.

Special points of interest:

- The CU*SPY vault archives both daily reports and e-Statements

- CU*SPY Reports has great search, notation and printing features

- CU*SPY e-Statements includes versions great for printing and for data reconciliation

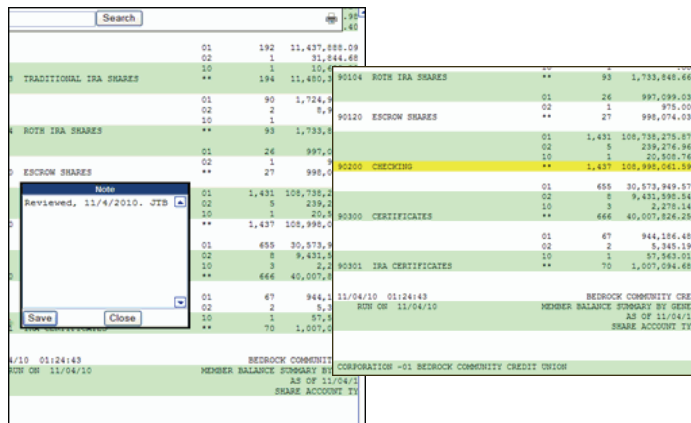## Search for Your Report Data — Down To the Specific Line

CU*SPY Reports has handy search options to allow you to hone in on the specific report or report term you are looking for. The specific lines with the term will be listed in the results to the left.

You can also use the Search feature in the right page to search for a term within the search results.
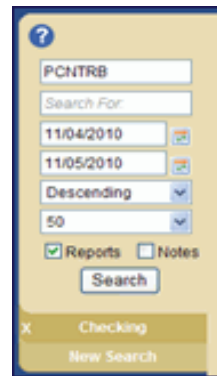

CU*SPY Reports search results show on the left pane. Select a result line to view the associated report in the right pane.

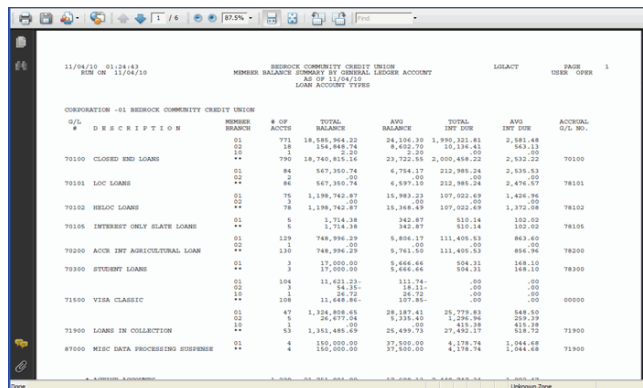## Add Online Notes to Mark Specific Data

Click any line to add a note. Once saved, the line is highlighted in yellow to indicate existence of note.

Enter a variety of search terms including report name, report term and date range. Click "New Search" to save these terms for future use.
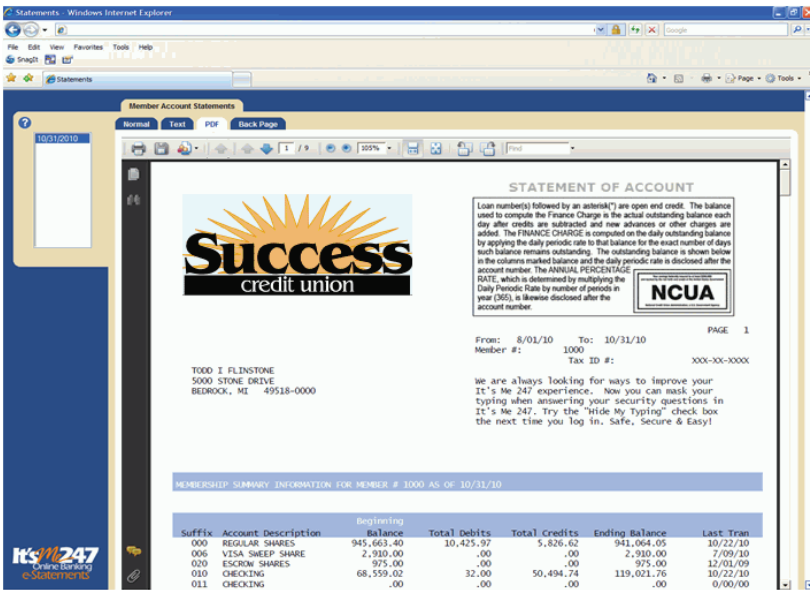
Combine Reports to a Single PDF for Searching or Printing

Want quickly print or search multiple reports? First enter the search terms for the reports and select the reports from the results. Then use the "Combine reports using PDF" feature to create one combined PDF. Easily highlight each term using the Find feature.

The "Combine Reports Using PDF" feature allows you to easily search or print your results.

Members and Employees Can View Statements Online

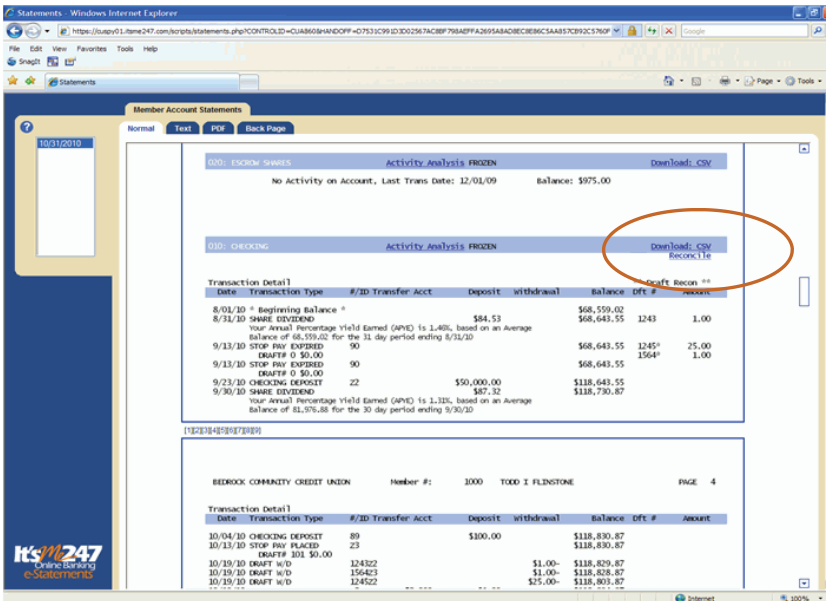The PDF view includes the credit union logo and is optimized for best printing.

Members selecting to view their e-Statements will first be presented this "jump page" to select the desired statement.

CU*SPY e-Statements allows members to quickly view their e-Statements online. Members will first select which statement they wish to view from a graphical "jump page" shown above.

Employees researching a member's statement via CU*BASE will not view this jump screen, but will instead move directly to view all statements.
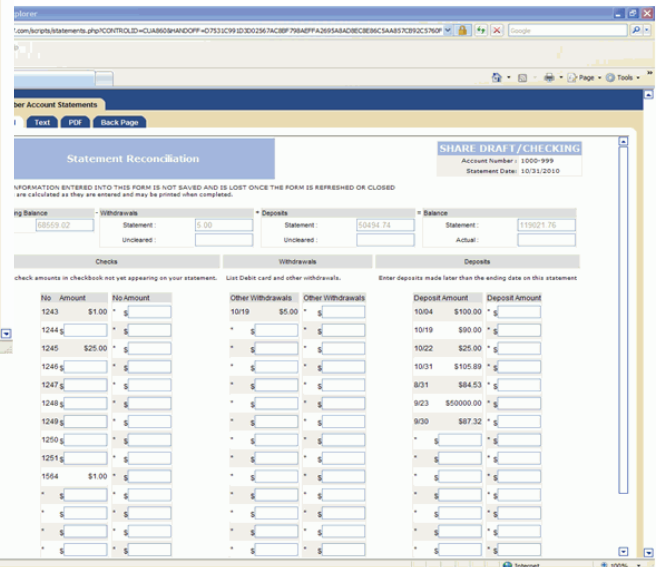
Download Your Data to CSV or Reconcile Online

The Normal view includes additional features to allow members to manage their financial data.

Members can reconcile their data online using the Reconcile page.

The Normal view of the statement has the powerful "Download to CSV" and "Reconcile" options, allowing members to either manage their finances using a spreadsheet application, such as Microsoft Excel, or to reconcile their data online using the Reconcile page.
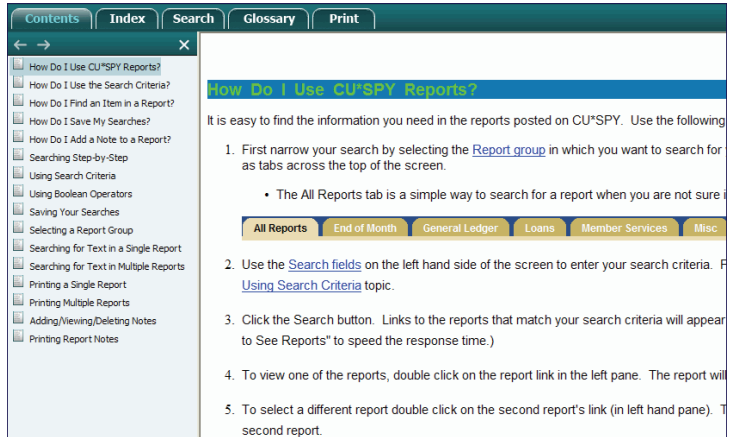
CU*SPY Online Help — for CU*SPY e-Statements and Reports

While working in CU*SPY, you may click the Help icon in the upper-right corner of any screen to display an online help system. Separate help systems covers viewing reports and statements in CU*SPY.

Both employees and members will find special hints about searching for reports as well as printing reports and statement copies.
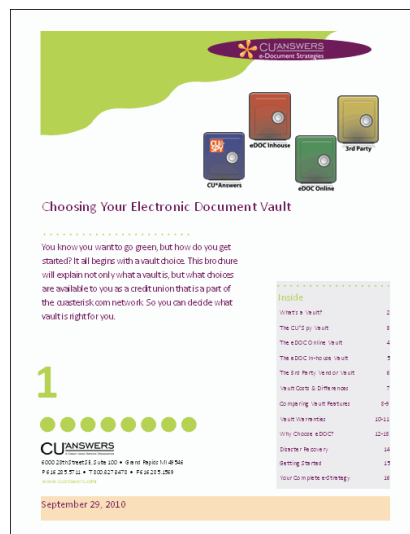
Be sure to check it out!

Learn More about e-Documents Strategies with CU*SPY

In addition to reports and statements, credit unions can leverage the CU*SPY online vault to archive e-Receipts, Photo IDs, e-Loan Forms, and supported Membership Forms. For more information on CU*SPY and other e-Document solutions available to you, refer to the first in our e-Document brochure series, "Choosing Your Electronic Vault."

Refer to:
http://www.cuanswers.com/pdf/cb_ref/ChoosingYourVault_book1.pdf