



cte custom training edition

Custom Training Edition (CTE)

User Guide

INSIDE THIS GUIDE:

This guide includes details about how files are set up, answers to frequently asked questions, and guidelines about using the CTE for a credit union's day-to-day training needs.

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The CU*Answers Education team is here to assist at any time. Find us, contact us, and learn more via [The Store](#) | [The Website](#) | [Email](#)

Getting Started

[Find information about pricing, processes, and the form to sign up in the CTE Overview.](#)

[Read more about CTE and the back office, lending/collections, and member services.](#)

[Request a \(free!\) demo from the Client Services and Education team.](#)

Glossary: CTE Basics

<i>Term</i>	<i>Description</i>
File Library	CUTEA# where A# is the assigned CTE library ID (A1, A2, A3, A4, etc.)
Credit Union #s	Will be assigned in increments of 1 starting at 7600 (7600, 7601, 7602, etc.)
Credit Union Name	Will add “CTE” to the beginning of the credit union’s actual name, such as: CTE Success Community Credit Union
Username	CTExx01 through 04 , where xx is the actual CUID of the credit union purchasing the custom training edition (for example, if the credit union’s CUID is CJ, then their usernames would be CTECJ01, CTECJ02, CTECJ03, and CTECJ04)
Employee IDs	01, 02, 03, and 04 Security for these IDs will be based on the “ST” employee ID template also used by the Bedrock CCU training library AD is reserved for CSR administration support 90, 91, and 92 are reserved for Operations and Programming support Employee ID 89 will NOT be retained in the CTE library. Someone aliased to 92 will be recruited to help create the initial “AD” ID so that it can be used to build the others.

To access the CTE, the user must log in using the special username (such as CTExx01) which is set up to point only to the CTE files.

*NOTE: This tool adds CTE support to a workstation that **already has CBX installed**, and it will use the same branch and terminal ID as that workstation. Also, it will work only for CTE libraries that have been set up already on our end. You will be advised when the tool is ready for your use.*

FAQs

Will passwords expire?

Username used to log in to CBX will expire with the same frequency as all other user IDs and can be changed in the same way via **Tool #199 Change User Name/Login Password**.

Employee IDs will be governed by the same policy that the credit union uses for their own employees, as of the time when the CTE files are originally set up. (This is because we will be copying their security master files, which includes the password expiration settings.)

Will we be able to reset our own passwords, or do I need to contact a CSR?

Credit union users will not have the ability to reset passwords for usernames nor employee IDs, so they will need to contact a member of the Client Services and Education Team to reset a password as needed. This will be done using the special “AD” administrator employee ID.

How will support be handled for the CTE? Will a CSR be able to access my CTE environment, in case I have a question or need support working with the training files?

The Client Services and Education team will handle all support for CTEs. CSRs will have their own administrator login and employee ID on CTEs to use for support purposes.

What should I do if I get an error message while working in the CTE?

Call Client Services just like when working in your own files. Make sure to tell the CSR that you are working in your CTE library.

Do standard issues have priority over CTE issues?

Yes, normal live production issues will always take priority over any CTE issue.

Will the CTE actually contain my member information?

Yes, your CTE library is an exact duplicate of your membership’s files, along with all your products and services, but without your employee security, and minus any employee/board member accounts.

Will CU employees have the ability to look at others employee accounts in the CTE library?

No. Memberships that are flagged with an Insider/Employee Type Code other than 00 will *not* be copied to the CTE library.

IMPORTANT: If your credit union does not currently flag employee, board member, and family memberships with these codes, this must be done before the initial file setup to avoid bringing over this sensitive data into your training library.

Why does the CTE only retain current month and one-month prior data when the free Bedrock CCU training service retains current and 3 months prior?

This is really due to managing how much space we use on our production system. Since all our clients share the same Bedrock library, that is just one library, and it is therefore practical to retain more history. CTE libraries that are purchased by credit unions must also all reside on the same production system, so to save resources we are limiting prior month history to a single month per credit union.

Are we able to request more or less data scrubbing during the quarterly CTE refresh?

Special arrangements may be available for an additional fee. Please contact a Client Services and Education team representative and request a quote. Restrictions apply, and we reserve the right to restrict any access deemed necessary to protect data or avoid conflicts with specific software functionality.

NOTE: When we refresh the files each quarter, security settings for the 4 employee IDs will be saved and restored after the refresh. Credit unions will not have access to any security controls for their custom training environment.

Can these be refreshed more often than quarterly?

Yes, but a special request is required, and additional fees will be charged. Contact a CSR for a quote. A minimum of 5 weeks’ notice is required for an unscheduled refresh.

During the quarterly refresh, are changes made in the CTE environment always overwritten with the updated data? Or is it possible to merge data?

Data will be overwritten with exactly what is on the credit union’s live files at the time of the refresh.

During the quarterly refresh, if we have changed configurations or added new products, will those show up in the CTE, too?

Yes. Any new products set up in your credit union’s “live” library will be copied over to the CTE during the refresh.

Is CTE a replacement for Bedrock CCU?

No. All online credit unions have the choice of continuing to use Bedrock CCU or purchasing a CTE of their own.

A CU can access both Bedrock CCU and their custom training environment; however, CUs with a CTE are generally discouraged from maintaining Bedrock logins as well.

Will there be a lot of delinquent loan accounts in my CTE, similar to Bedrock?

Bedrock doesn’t have real members who make normal loan payments, so there are a lot of delinquent accounts in that training library.

Your custom training environment library uses a snapshot of your real members’ data. Since normal daily processing is done on the CTE, it is inevitable that loan accounts not receiving payments will eventually start appearing as past due. However, because of the quarterly refresh, this will be minimized and hopefully less obvious, especially during the first month or so following the refresh.

Of course, any loans that are already delinquent as of the time the data is refreshed with live files will show as past due on the CTE.

With not being able to “order” ATM/debit cards will we still have functionality to go through the process and practice setting those up?

No. Access to those commands will be blocked for your protection.

Will we have access to work ACH exceptions for training purposes after a refresh?

Yes, assuming there were exceptions waiting to be worked when your files were copied, then you will be able to access the ACH exception file after a refresh. Just remember that once that file is gone, there will not be another until your next file refresh.

Why can’t we have 2-digit IDs set up for every one of the employees at the credit union?

To protect the data in this file and any potential complications from interactions with other production libraries, we are strictly controlling the security access to configurations and other features on the CTE. Therefore, our CSRs must handle all security-related tasks. The limited number of user and employee IDs is necessary to make this maintenance manageable and as automated as possible.

Since the member accounts will be the same in our CTE, how will a user be able to keep track of which files they are working in?

We recommend that the special CTE icons be placed only on your credit union’s training workstations. A user must use a special login ID and employee ID to access these files. Auto Security will be disabled, thus forcing the user to enter the special employee ID for every transaction. This helps reinforce to the user that they are in the custom training environment.

How is the CTE's monthly maintenance fee used?

The custom training environment monthly maintenance fee covers lots of behind the scenes work by numerous teams, including Client Services and Operations, as well as the use of the additional space on the production box.

How do software updates work for CTE?

Since your CTE is on the production system and uses the same production-level CBX software, these workstations will receive updates at the same time and via the same method as all your other workstations. You do not need to do anything special other than close the session and re-launch after an update is deployed.

Can I train on producing e-receipts and capturing electronic signatures on forms on the CTE?

No. For security reasons and to avoid added complexity, we do not support printing or archiving from the custom training environment.

Can I use Report Builder while in the CTE?

Yes. Any definitions or database files you create will be saved to a special QUERYxx library (where xx is your CTE ID, such as A1, A2, etc.). QUERYxx will be cleared automatically during each quarterly refresh.

Will I be able to control which tools employee IDs can access in CTE? Can I access security controls?

No. These settings are controlled by CU*Answers and cannot be changed by your credit union. CU*Answers CSRs will be responsible for updating these security settings as changes are made with CBX releases.

In order to keep up with new tools as they are added or changed over time, we will automatically take a snapshot of the current status for the 4 IDs (plus the special administrator ID) and retain those after the files have been refreshed and your employee data cleared out of the CTE each quarter.

Copying Credit Union Files to the CTE

This section documents the steps that are taken when the special "CTE refresh" routines are run, either to perform the initial setup of a new CTE library or to refresh it from live files each quarter.

Initial File Creation

1. Saves current live credit union to save file.
2. Restores live credit union from save file to CUTExx (where xx = A1, or A2, etc.).
3. Grants object authority to CUTExx library.
4. Clears the CBX printer configuration file.
5. Creates the CUTExx printer/output queue.
6. Clears the credit bureau history files.
7. Clears the online credit report files including decision files, if used.
8. Clears the tracker files.

9. Clears the shared branching files including national shared branching.
10. Cleans up the ATM/debit/credit card BIN configuration file (PANBIN) to deactivate card maintenance functionality and other features.
11. Makes all email addresses invalid.
12. Changes the CU name in CBX to have “CTE” in front of the regular CU name.
13. Removes the online credit report pull configuration from CBX.
14. Changes the retention of transactions to 1 month for all types.
15. Changes the bank id to all 9s (an invalid number).
16. Changes the R/T to all 9s (an invalid number).
17. Removes all CBX employee IDs except 90, 91, and 92.
18. Removes all CBX employee IDs from menu security in CBX – except 90, 91, and 92 (*includes data in files SECMAS, SECMENU, ACTSEC and ACCLIST*).
19. Creates the CUTExx printer in the CBX printer configuration file – this is the only one in the file.
20. Updates all terminal configurations to have the CUTExx printer as the printer for everything.
21. Removes all memberships and accounts where the employee type is greater than zero (0).
22. Copies over the latest EOM files to the CUTExxE library.
23. Runs the standard CBX transaction purges to have just one month of transactions.
24. Adds entry to the CUMSTRPF master file so it can be seen on the Credit Union Navigation Screen used by CU*A staff.
25. Creates an empty QUERYxx library (where xx is A1, A2, etc.).
26. Clears any supplemental vault configurations.

Quarterly File Refresh

These steps are performed near the beginning of each calendar quarter to refresh CTE files from current credit union libraries. This process can also be run at other times based on special credit union requests (a fee will apply).

1. Saves CBX terminal configuration file in the CTE library.
2. Saves CBX printer configuration file in the CTE library.
3. Saves CBX security configuration file in the CTE library.
4. Save CBX menu security file in the CTE library.
5. Deletes the CUTExx custom training library.
6. Saves current live credit union to save file.
7. Restores live credit union from save file to CUTExx (where xx = A1, or A2, etc.).
8. Grants object authority to CUTExx library.

9. Restores the saved CBX terminal configuration file.
10. Restores the saved CBX printer configuration file.
11. Restores the saved CBX security file.
12. Restores the saved CBX menu security file.
13. Clears the credit bureau history files.
14. Clears the online credit report files including decision files, if used.
15. Clears the tracker files.
16. Clears the shared branching files including national shared branching.
17. Cleans up the ATM/debit/credit card BIN configuration file (PANBIN) to deactivate card maintenance functionality and other features.
18. Makes all email addresses invalid.
19. Changes the CU name in CBX to have “CTE” in front of the regular CU name.
20. Removes the online credit report pull configuration from CBX.
21. Changes the retention of transactions to 1 month for all types.
22. Changes the bank id to all 9s (an invalid number).
23. Changes the R/T to all 9s (an invalid number).
24. Removes all CBX employee IDs except 90, 91, and 92.
25. Removes all CBX employee IDs from menu security in CBX – except 90, 91, and 92.
26. Creates the CUTExx printer in the CBX printer configuration file – this is the only one in the file.
27. Updates all terminal configurations to have the CUTExx printer as the printer for everything.
28. Removes all memberships and accounts where the employee type is greater than zero (0).
29. Copies over the latest EOM files to the CUTExxE library.
30. Runs the standard CBX transaction purges to have just one month of transactions.
31. Clears all files and query definitions from QUERYxx.
32. Clears any supplemental vault configurations.