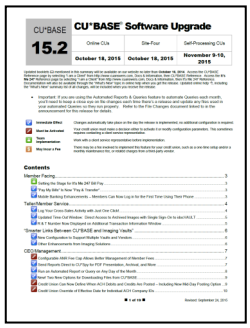
CU*ANSWERS
The Writing Team

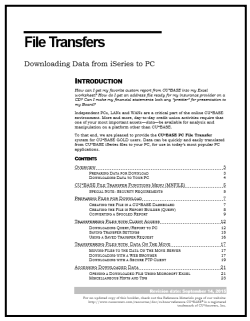
Writing Team: Tricks of the Trade

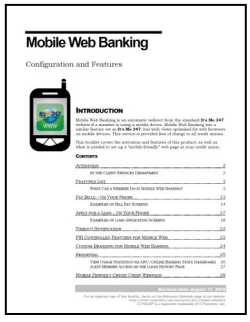
October Top Picks: 15.2 Release Documentation #1

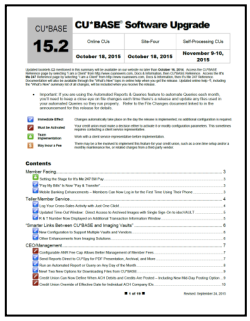
Issue 47

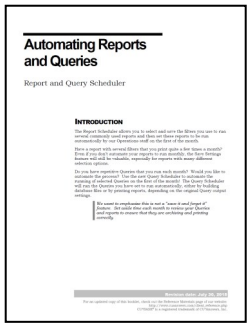
Be sure to attend the upcoming Tricks of the Trade webinar on October 27 from 3:30-4:00 PM ET. Watch for an invitation via email. Learn about new features implemented with the 15.2 CU*BASE release. This is a two-part series, so be sure to also attend the November webinar to learn even more about documentation for the release.











Pick #1: Where can I find out about enhancements in the 15.2 CU*BASE release?

As with every larger release, we have provided you with the 15.2 CU*BASE Release Summary, which covers all of the major changes with the release. Organized by job description, this document not only explains the new features at a higher level, but also includes the names of the booklets you can read to learn more detailed information.

The 15.2 CU*BASE Release Summary is posted on the Release Summaries page. On this page you can also find the release summaries from previous releases.

Pick #2: Where can I learn more about the new file download feature? Where is the form that I use to set up access?

With 15.2, you are now be able to download files from CU*BASE to our "Data on the Move" server. From there, you can either use a web browser (best for small files) or secure FTP client (best for large files) to complete the file transfer.

Learn more in the File Transfers: Downloading Data from iSeries to PC booklet, available under "F" on the CU*BASE Reference page.

You will need to submit the updated iShield Security Access Request for CU*BASE Uploads/Downloads form to receive the new download privileges. Find the form on the Special Interest Publications page.

Pick #2: With 15.2, my members can log into online banking for the first time on their phone using mobile banking. Where can I go to see what they see?

Now when you start a new member at your credit union, you can have them use their phone to complete their initial enrollment in **It's Me 247** using mobile banking. See pictures of what the members see on their phone as well as pictures of the other new features in the Mobile Web Banking booklet, available under "M" on the CU*BASE Reference page.

Pick #4: Where can I go to learn more about sending reports directly to CU*Spy so I can convert them into PDFs and archive them?

The 15.2 CU*BASE Release Summary does an excellent job of summarizing the new "Instant Reports" feature, which allows you to send reports directly to CU*Spy for archiving. Enter INSTANTxx in the printer queue, and a few minutes later they will appear in CU*Spy, where you can generate a PDF for your next board report.

Pick #5: Where can I learn more about scheduling a report multiple times in the month?

You can now schedule your automated reports and Queries for a specific day of the month. For more information, refer to the Automated Reports and Queries booklet, available under "A" on the CU*BASE Reference page.

***Refer to the Tricks of the Trade Newsletter Series page* to review previous Tricks of the Trade newsletters.**