

New CU*BASE Menu System

New screenshots
as of 7/7/2016



- Serve the Google generation – searching is the new norm
- Adopt an “it’s me” focus (“show me only what I need, the way I like to see it”)
- Show users only the tools they can actually use
- Help users find tools faster
- Shorten the new user learning curve
- Better use of available screen space in the GUI
- We’ve hit the limits of our infrastructure (30 items per menu)
- Reduce the pain of menu changes for CU Security Officers
- Move towards more mouse-driven functionality that is faster and more intuitive
- Eliminate constant updates to doc, online help, Operator Run Sheets by assigning permanent tool numbers that will never change
- Allow keyboarders to assign their own numbering scheme

1,012
FUN FACT: There are ~~956~~ menu options and 51 speed sequences on CU*BASE menus

<http://www.cuanswers.com/resources/kitchen/revamping-the-cubase-menu-system/>

**Targeted for beta by the end of the year
and a special release early in 2017**

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Coming early 2017!

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Session 2 GOLD - Setting Up Your Tools

Welcome!

Please let us know who you are so we can gather your tools and favorites!

Employee ID

Password

Signoff



Session 5 CU*BASE GOLD -

File Edit Tools Help

CU*BASE Tools

All My Tools

Welcome, DAWN MOORE TESTING REALLY LONG! What would you like to do today?

My Follow-Ups

My Favorite Tools

Tool # Shortcut

All My Tools

Search for

Recommended Tools

All Available Tools

Action	Tool #	Title	Shortcut
	1850	Go! Mail/Direct Member Posting	
	1860	Go! Member Acct Adjustment (Coded)	ADJ
	1930	Go! Member Personal Banker	
	1830	Go! Member Skip-Pay Program Opt-in	SKIP
	1840	Go! Member Starter/Replacement Checks	
	840	Go! Monthly GL Balance File Analysis	
	2880	Go! Net Relationships Dashboard	
	1700	Go! Open/Maintain Memberships/Accts	OPEN
	310	Go! Paper Bill Inventory Report	
	1910	Go! Post Wire Transfer to Member Account	WIREP
	1410	Go! Print CU Financials	
	1420	Go! Print Financial Report Configuration	
	1390	Go! Print GL Chart of Accounts	
	1430	Go! Print GL History (daily)	
	1400	Go! Print GL Trial Balance (monthly)	
	1420	Go! Print Loan Coupons	
	1800	Go! Print Member Certificate Form	

Total # of tools: 75

Auto-security is ON



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Shortcut

EN
REP

FR (6021)

Total # of tools: 75 Auto-security is ON

FR (6023) 7/07/16

Session 5 CU*BASE GOLD - About This Tool

Title **Open/Maintain Memberships/Accts** Tool # **1700** [Save As Favorite](#)

Shortcut **OPEN** [Remove Favorite](#)

Description

The starting point for opening memberships (accounts) or sub-accounts or for making changes to existing memberships. Selections that are presented when opening memberships are controlled by the credit union workflow controls. While opening memberships, you can run DFAC scans, ID Checks and Blocked Persons scans on the members. You can also update member information, including overdraft protection, e-statement enrollment, joint owner information, household information and marketing clubs.

[Launch Now!](#)

Program **UMBRCTL** Open/Maintain Memberships/Accts [My Access to This Tool](#)

Categories **Lending/Loan Account Tools, Member Service Tools** [Full Access](#)

Tool types **Maintenance & Posting Programs**

Job classifications **Teller / Member Service Representative**