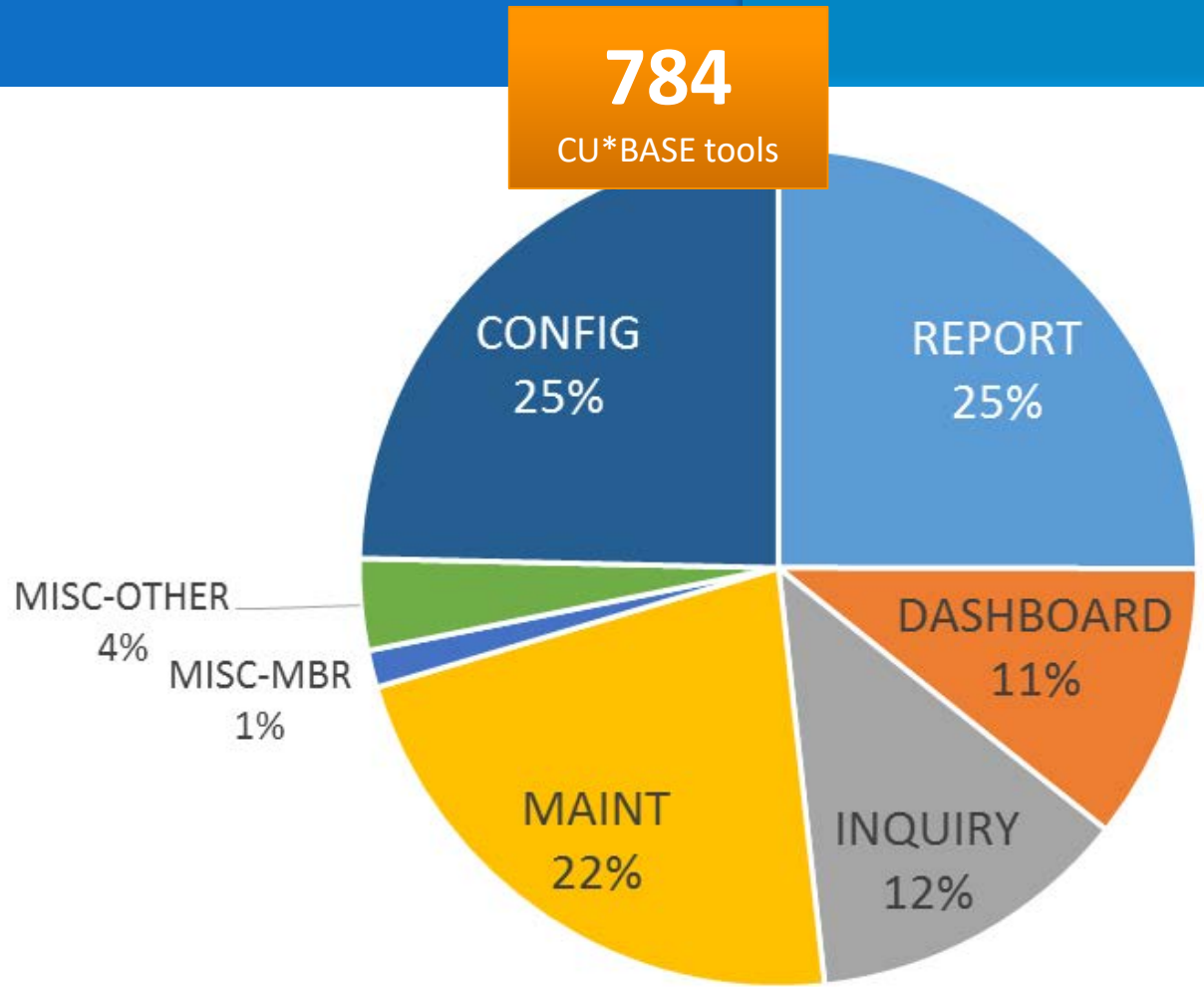
A New Way to Get Around in CU*BASE gold edition

Revised: January 27, 2017

A New Day-to-Day Experience for CU*BASE Users

COMING IN MARCH 2017

- When it comes to the employee experience, it doesn't get much closer to home than the way users navigate CU*BASE
- Serving the Google generation – searching is the new norm
- Serving the "it's me" generation – set things up the way you like to work
- More than just a pretty new face – this project is a completely new infrastructure on which we can build for years to come



“But I liked it the way it was before!”

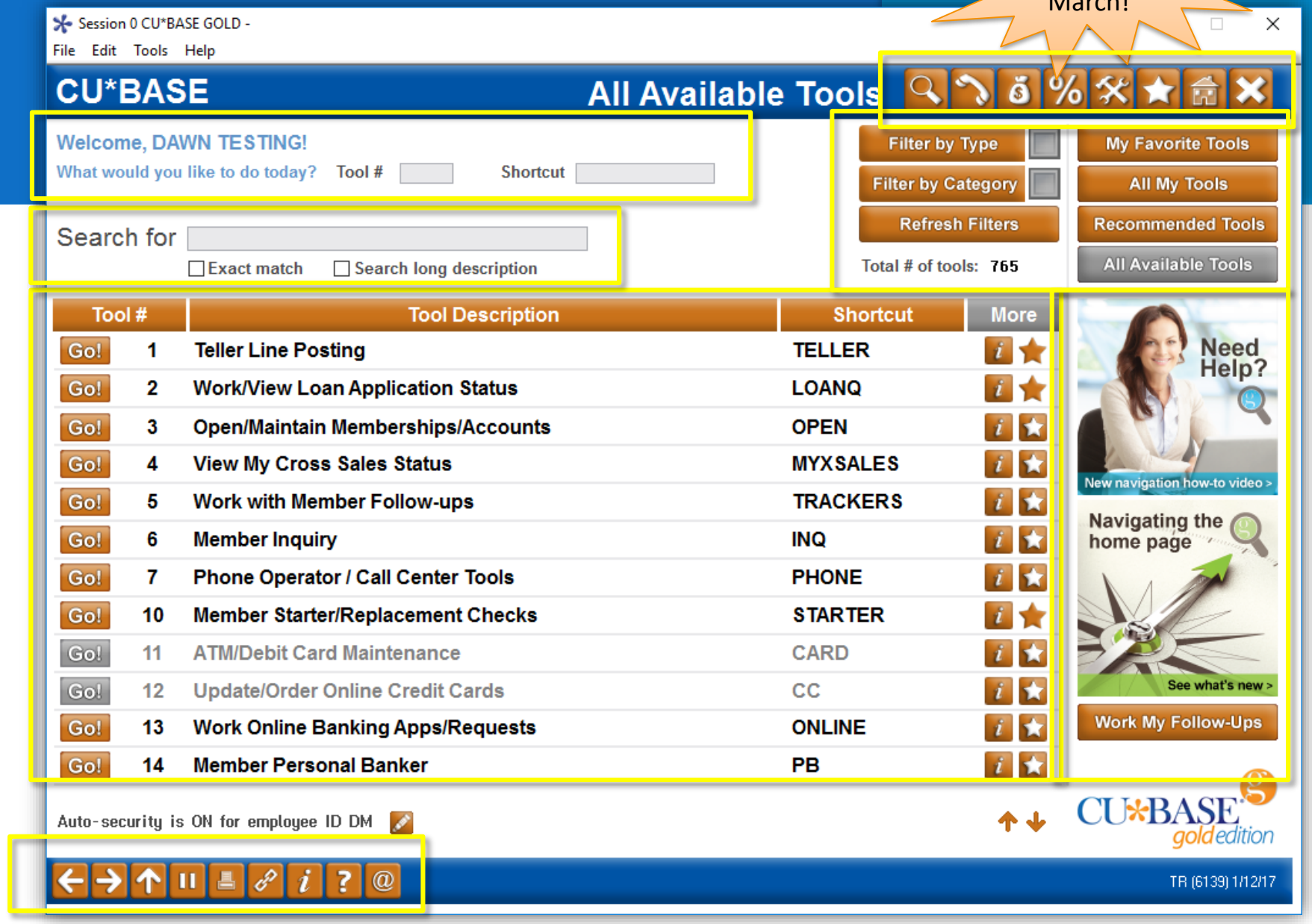
GO-TO POINTS SO YOU CAN BE A CHEERLEADER FOR THE NEW NAVIGATION

- Search right from the home page – *faster and more intuitive search engine*
- Sort your list the way you like
- Set up your favorites and assign your own option number – *your tools in the order you like them*
- Favorites are by employee ID, not workstation – *use them anywhere you’re working*
- Permanent tool #s we can reference in our help doc and release summaries – *no more outdated references*
- Shortcuts for any tool – *no extra security settings needed*

  90 new shortcuts on day one!
- See only the tools you can use – *but you can still get curious about new tools to explore*
- Old MNXXXX shortcuts are still available to help with the transition – *we haven’t forgotten about our current power users!*
- Much faster learning curve for new users – *designed for both mouse and keyboard users*
- Cool stuff for data analysis and auditors, too – *embedded tools to explain program names*

A new way to navigate to CU*BASE tools

- The CU*BASE menu-driven navigation system is being replaced by the new **CU*BASE Tools home page**



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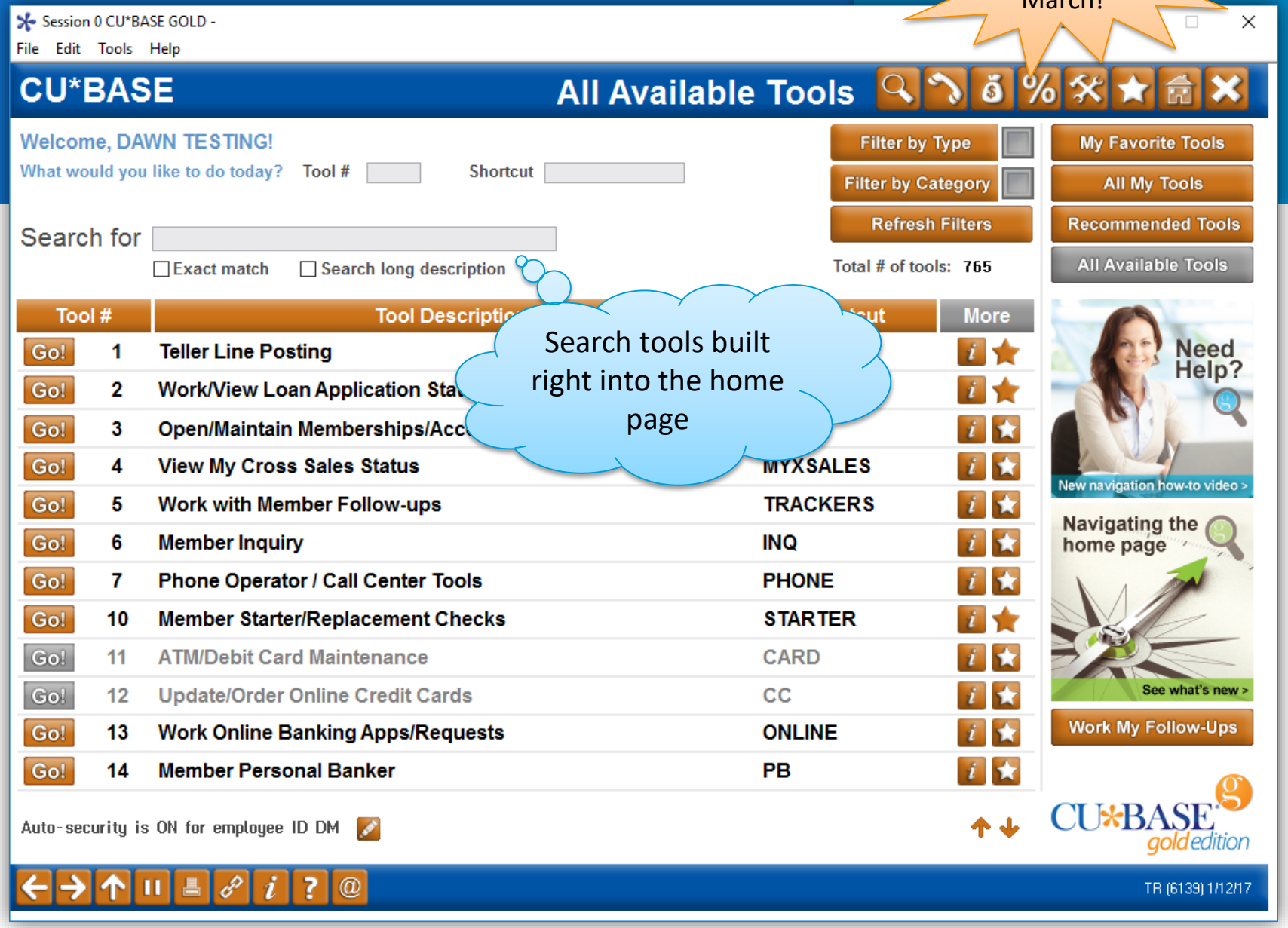

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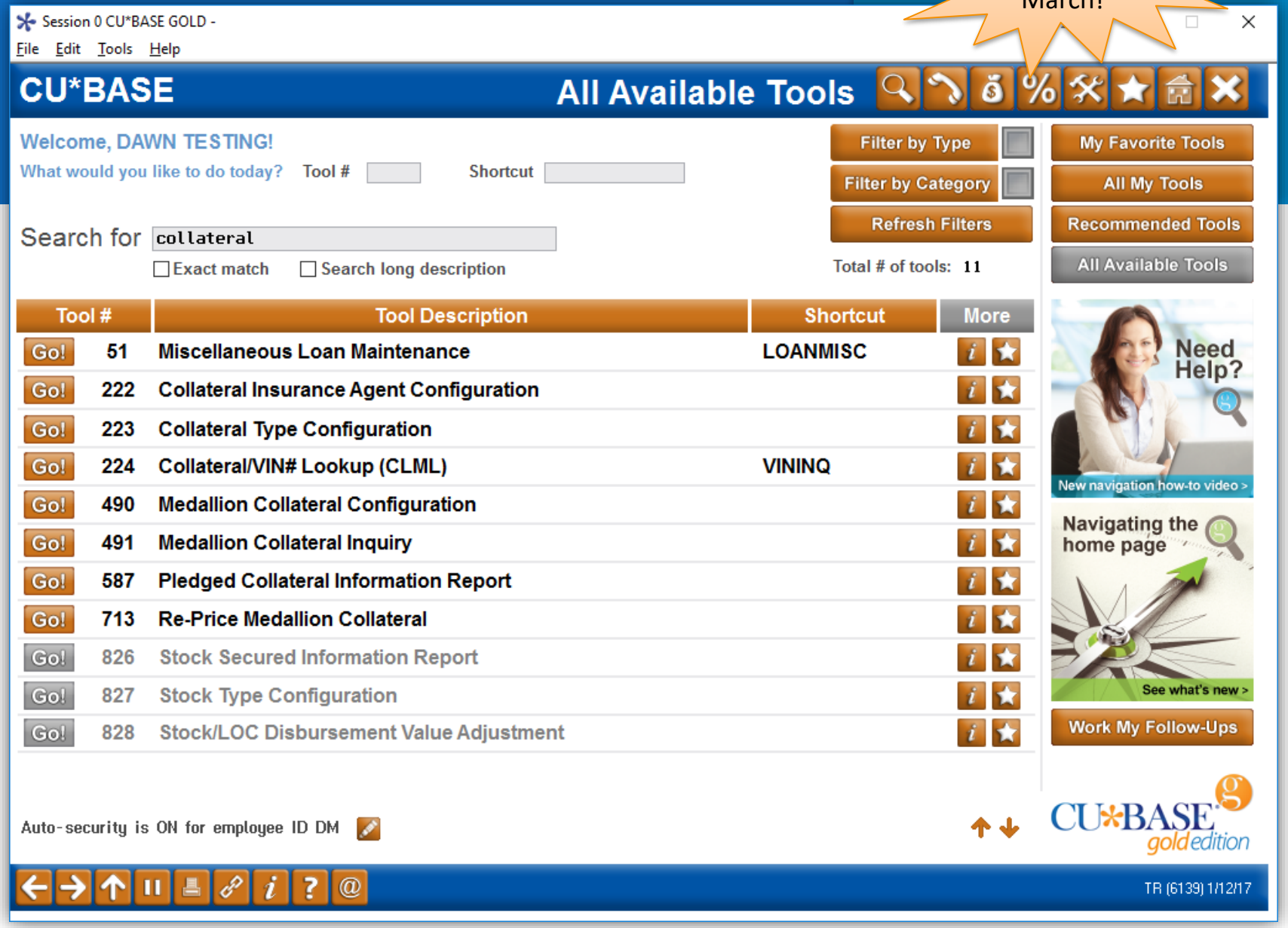

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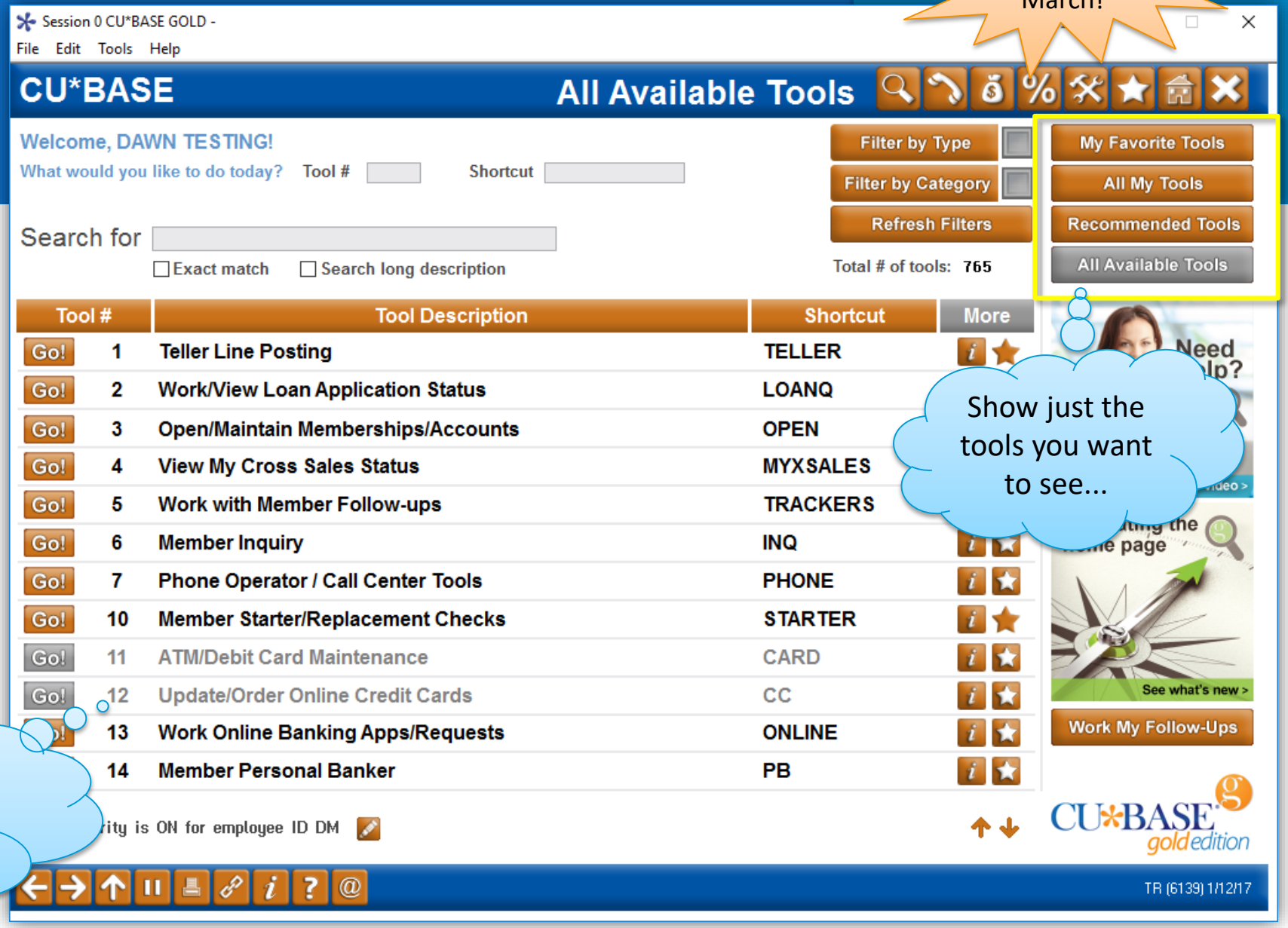

Show just the tools you want to see...

...to control whether or not you see options you can’t access

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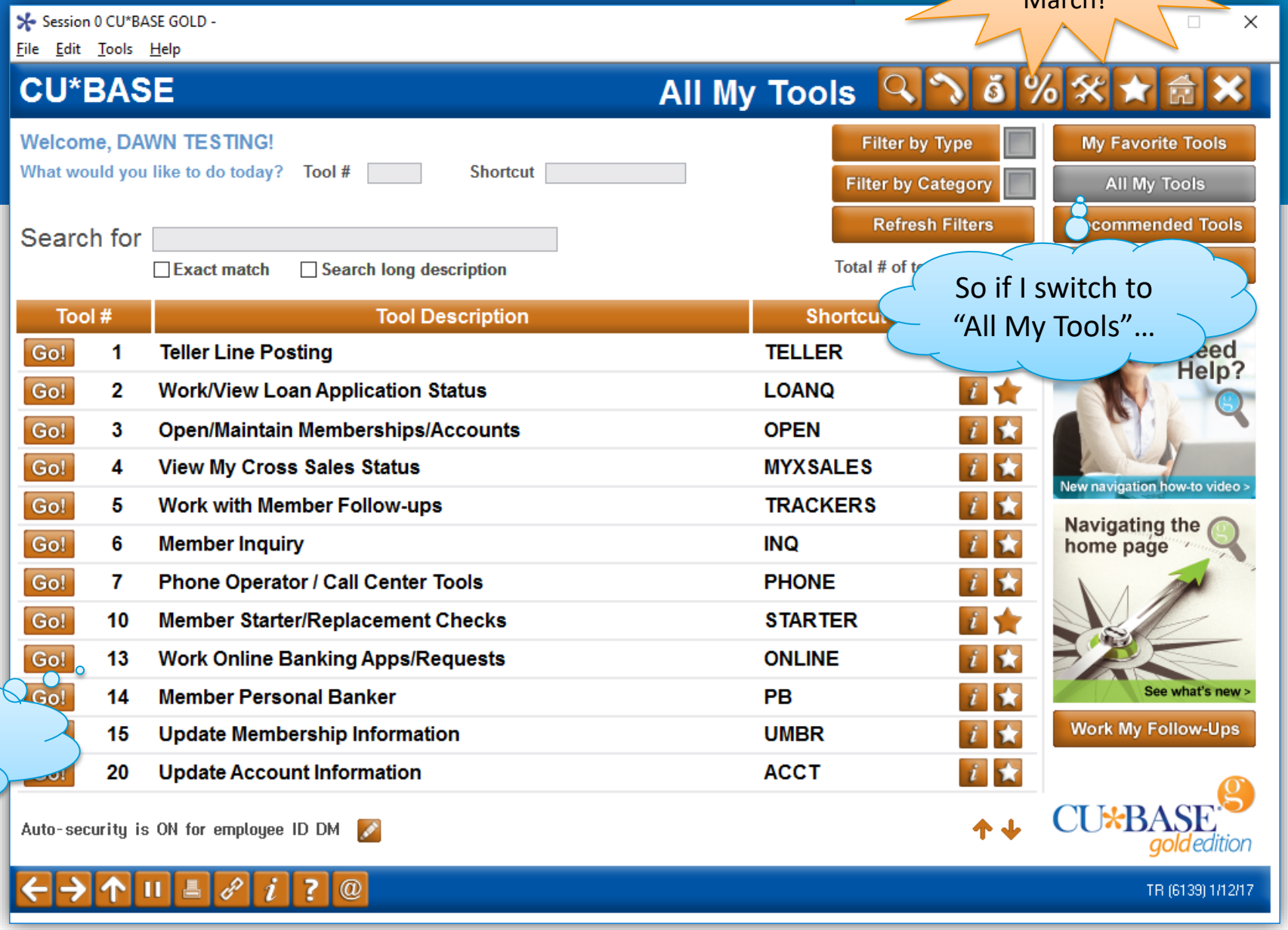

…see how those grayed-out ones disappeared?

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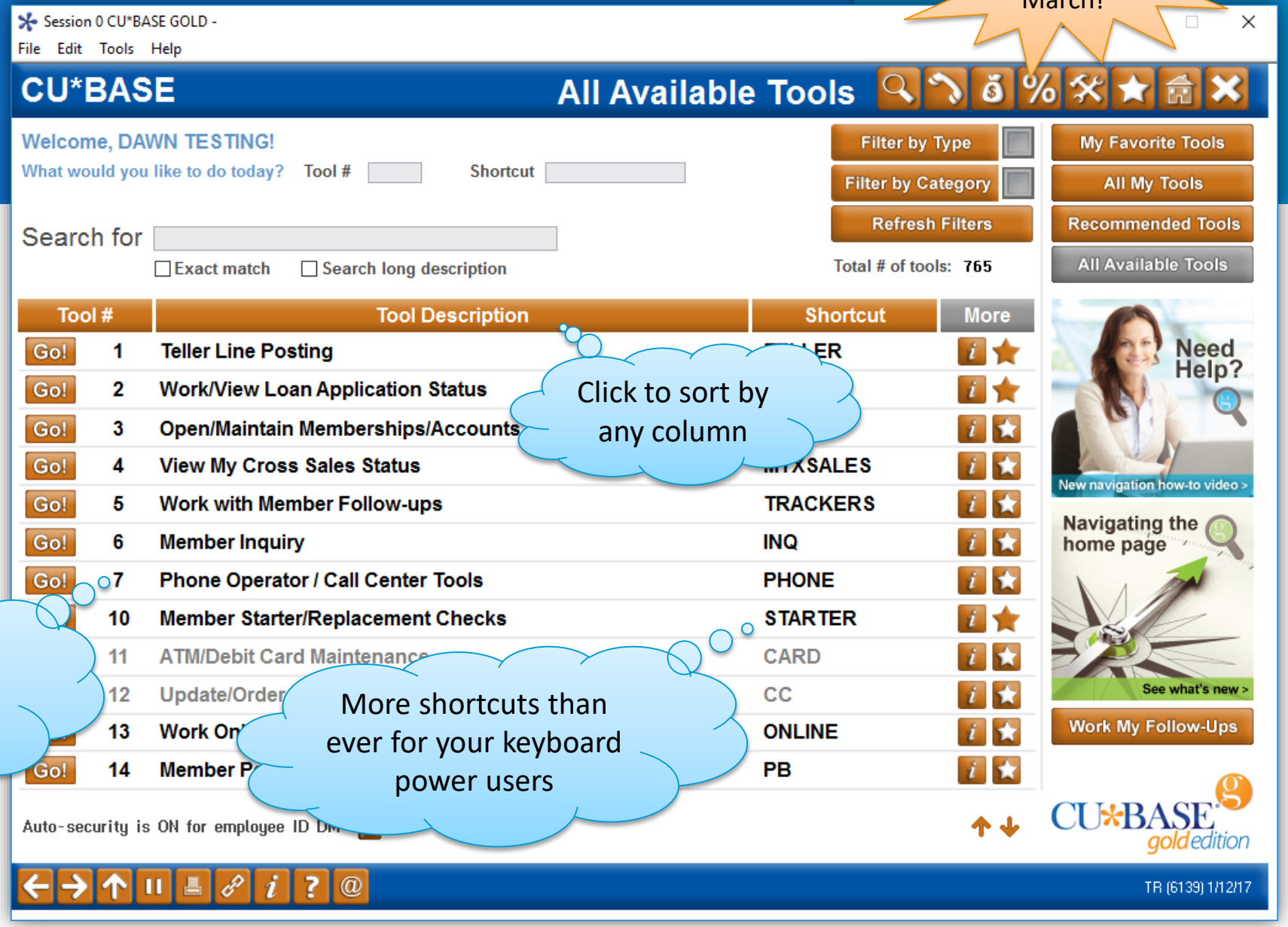

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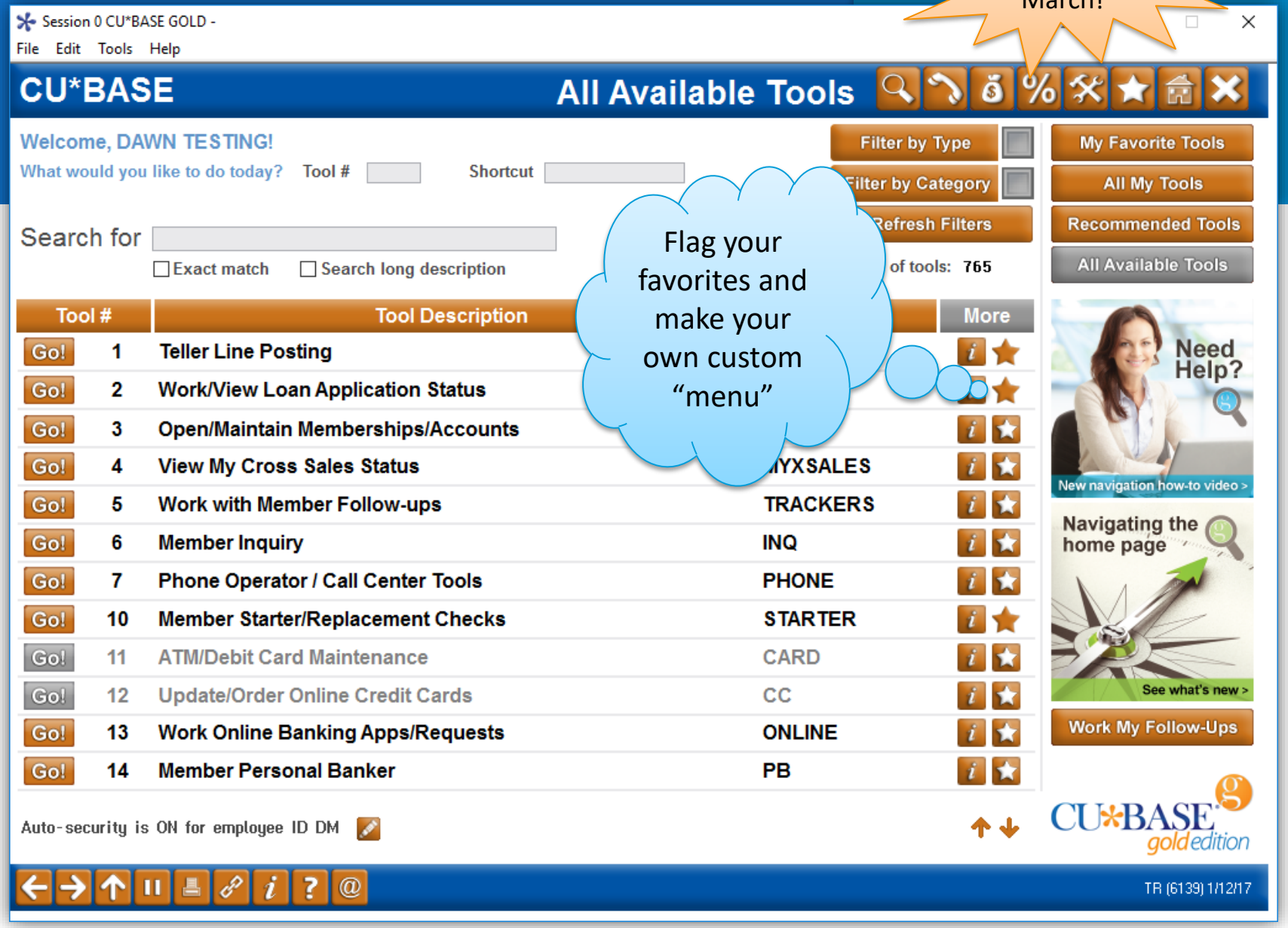

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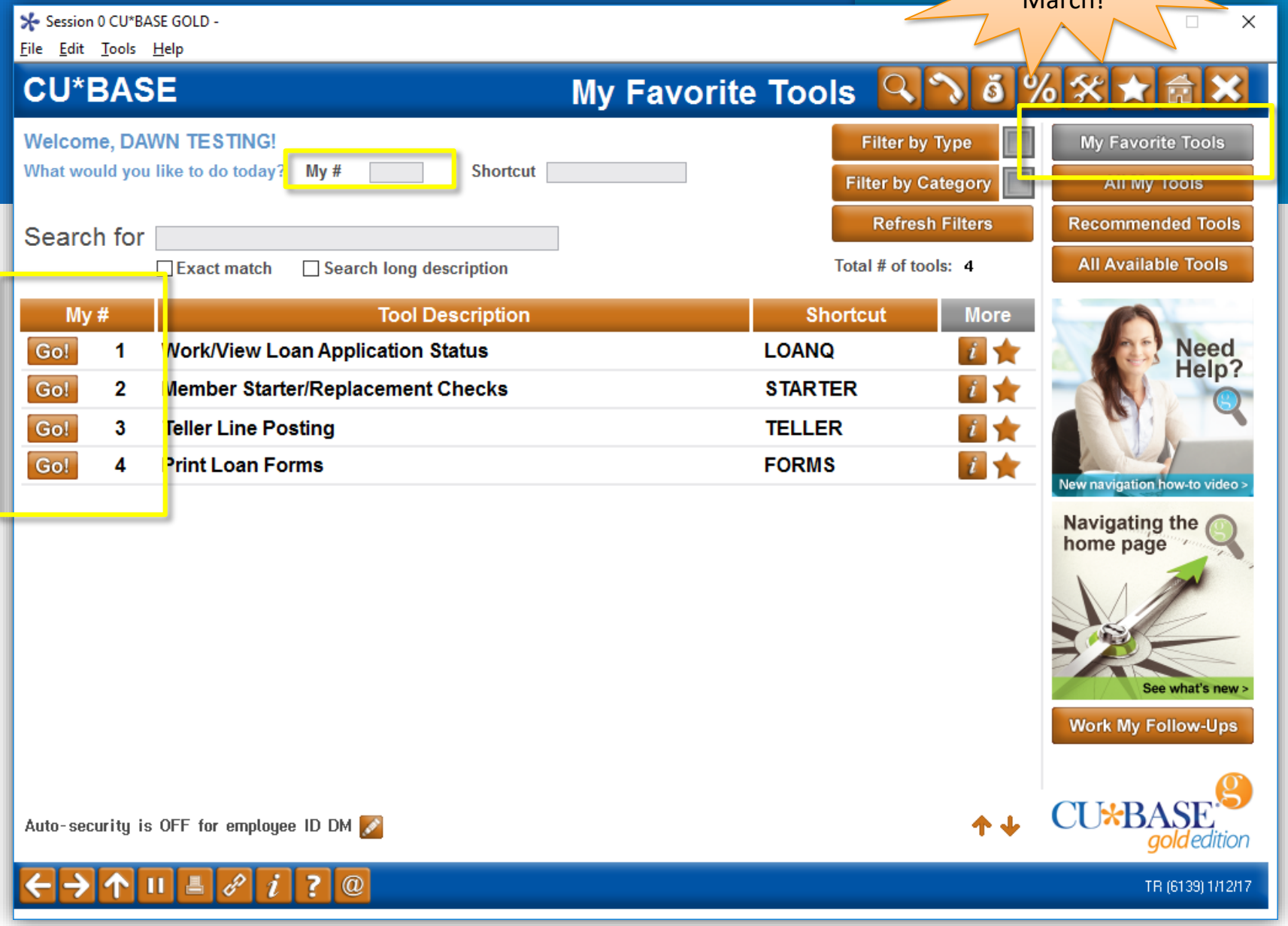
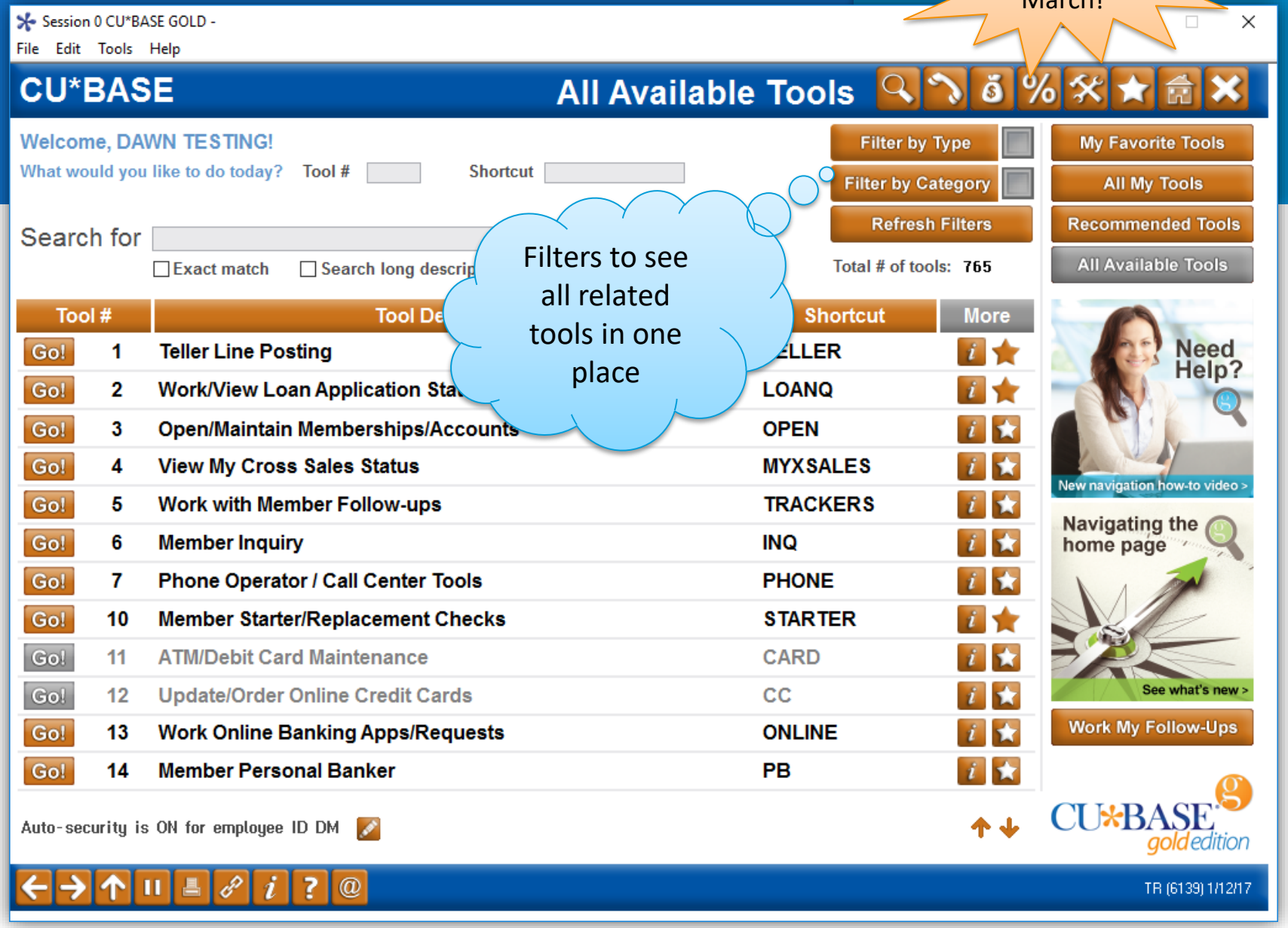


A new way to find what you need

- Search by key word

OR

- Filter by Category



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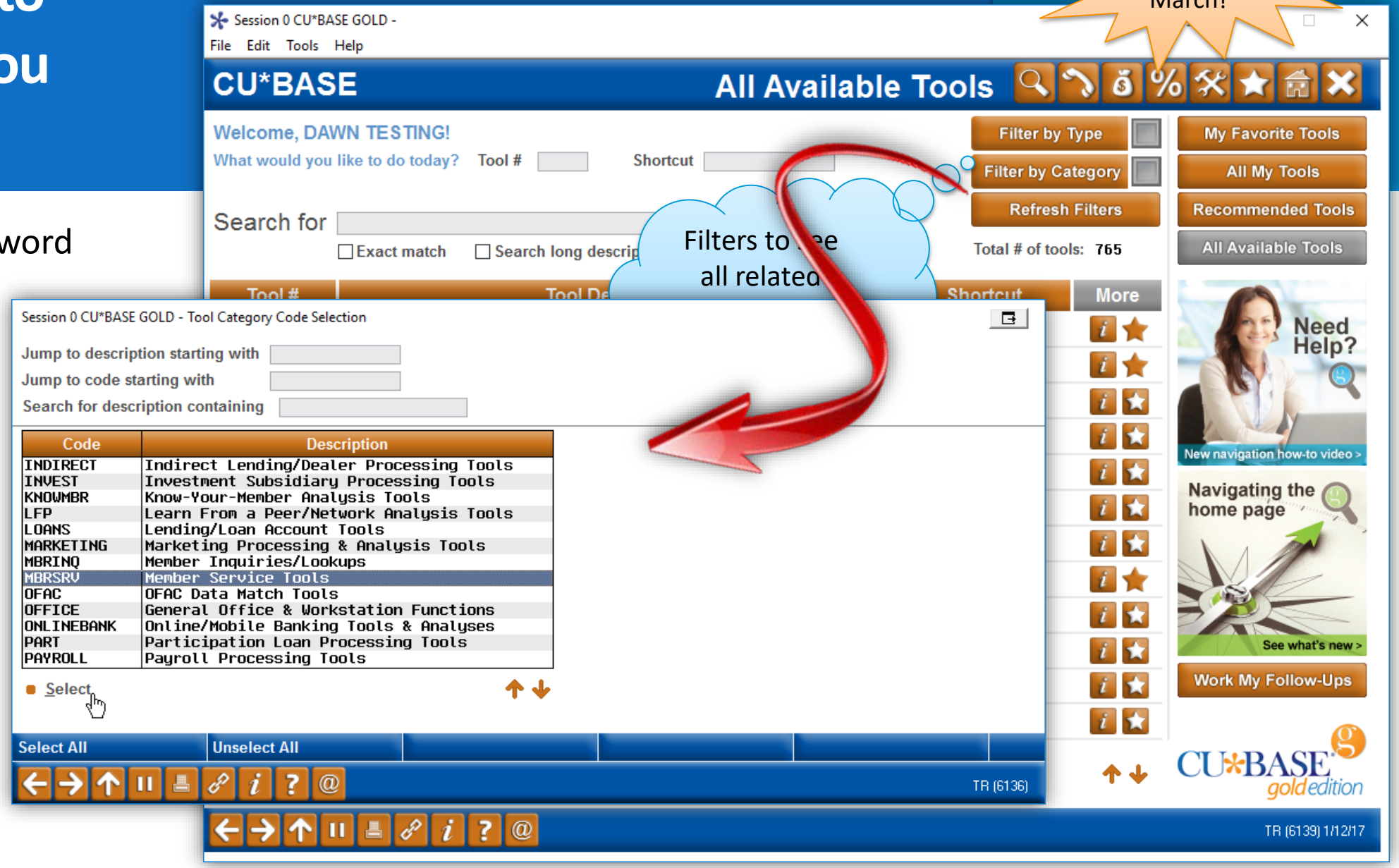

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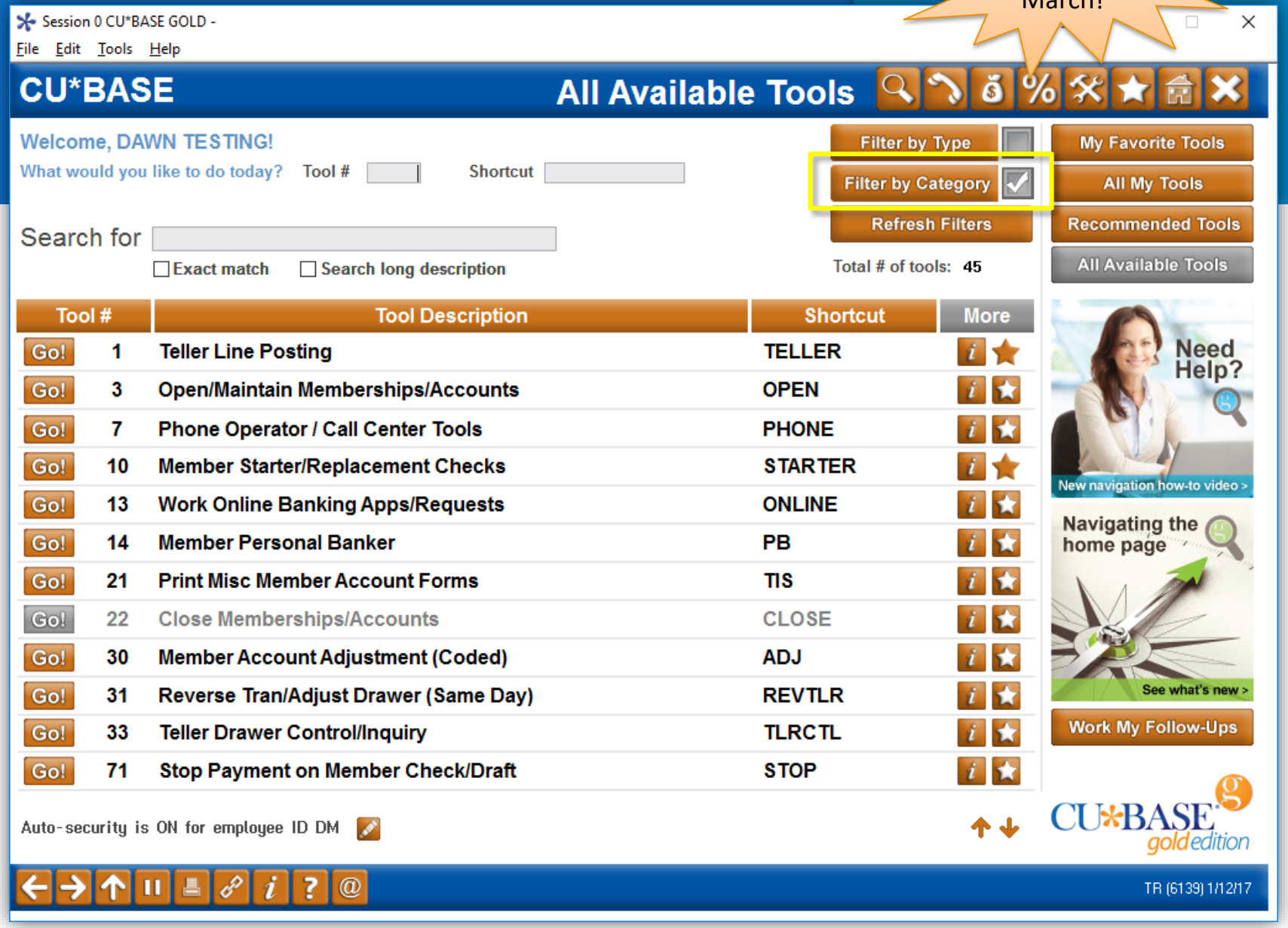
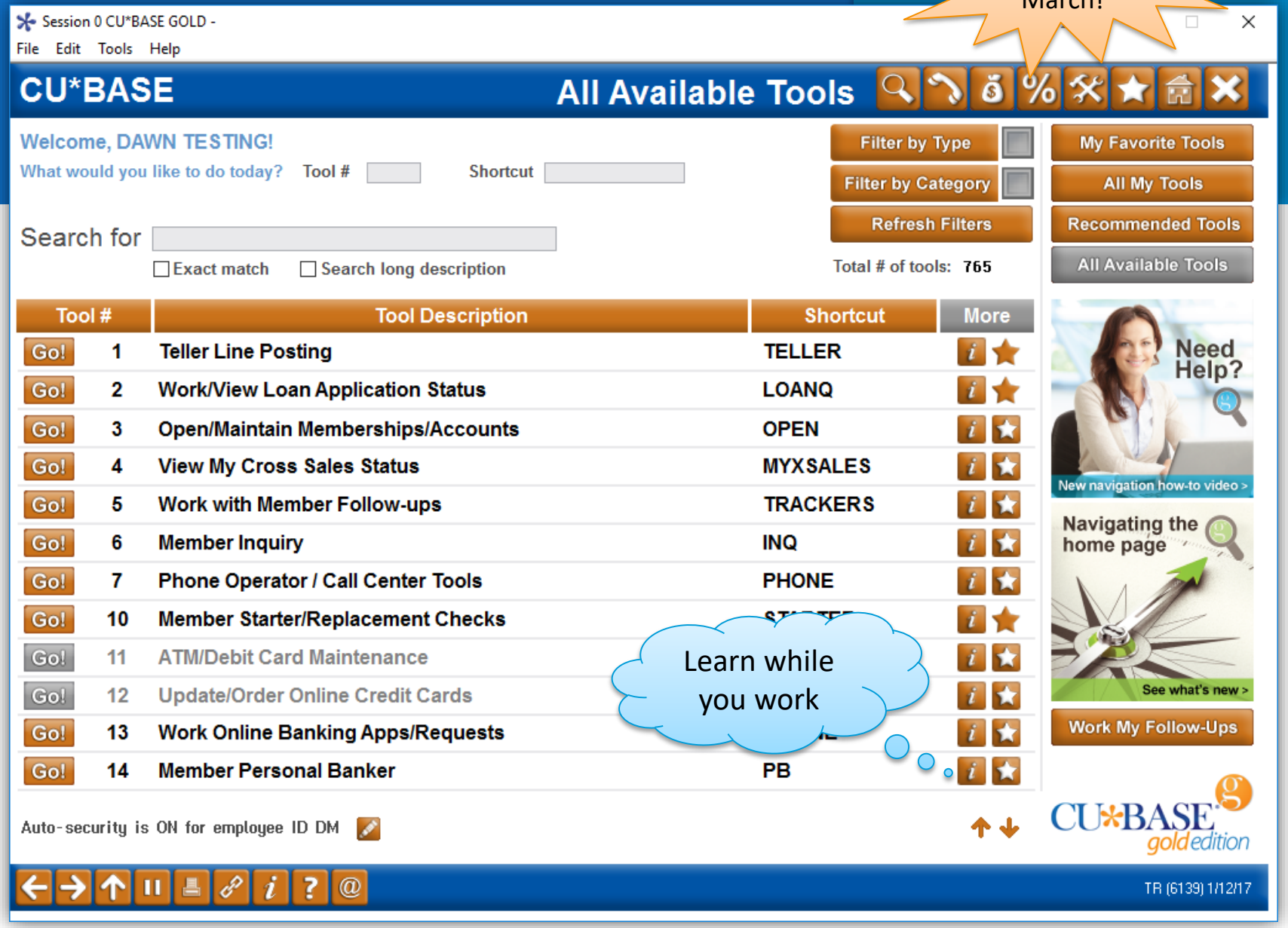


A new way to learn about CU*BASE tools

- Employees, managers, and security officers will have ready access to details about what the tool does and who should be using it



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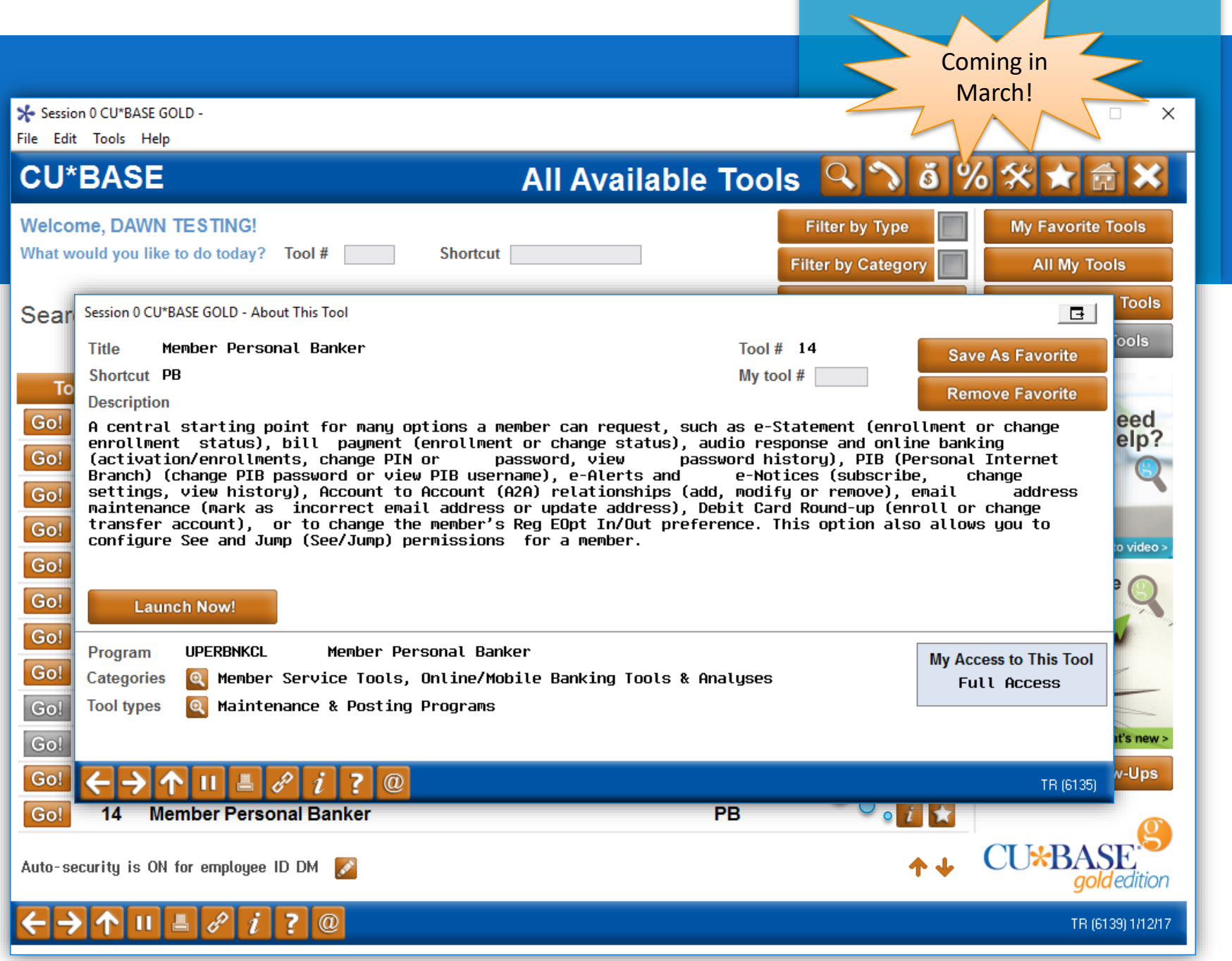

Changes to Employee Security

There is one group that won't need much cheerleading…

THINGS JUST GOT ABOUT A THOUSAND PERCENT BETTER FOR YOUR SECURITY OFFICERS

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*...+....1....+....2....+....3....+....4....+....5....+....6....+....7....+....8....+....9....+....0....+....1....+....2....+....3
10/27/16  14:09:28                          CREDIT UNION                          LEMPAU10        PAGE
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EMP                                  MENU OPTIONS Y = ENABLED, BLANK = ENABLED, N = NOT AUTHORIZED, * = NOT A MENU OPTION
ID                                   01 02 03 04 05 06 07 08 09 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29
AA  AUDJ                              N  N  *  N  N  N  N  N  N  Y  N  N  N  *  *  N  N  N  N  N  N     *        *  *  *  *
AB  ANDF                              Y  N  *  N  N  N  N  N  N     N  N  N  *  *  N     N  N  N  N  N  *  N  N  *  *  *  *
AE  AMF                               Y  N  *  N  N  N  N  N  N     N  N  N  *  *  N  N  N  N  N  N  N  *        *  *  *  *
AF  AMY                               Y  N  *  N  N
AG  AMA                               Y  N  *  N  N
AH  AN                                N  N  *  N  N
```

VS.

Session 0 CU*BASE GOLD -

POP1 POP2 File Edit Tools Help

Assign Tools to Employees

All Available Tools

Employee DM DAWN TESTING # employees 239

A highlighted row indicates a custom program

Search for ☐ Exact ☐ Description Tool #

Categories Select Types Select

Tool Description	View Only	Categories	# Employees	This Employee
Abnormal Activity Monitoring Config		CONFIGS	7	None
Account Balance Analysis Report		REPORTS, MARKETING	40	None
Account Retention by Age Group		KNOWMBR, ANALYSIS	4	None
Account Retention by Year Opened		KNOWMBR, ANALYSIS	4	None
Account Suffix Configuration		CONFIGS	5	None
Accounts Payable Vendor Inquiry	Y	AP, REVIEW	7	None
Accrue Interest for 360 Partic. Loans		PART	6	Full Access
Accrued Dividend Summary Rpt - CDs		REPORTS	9	None
ACH Extract/Post		ACH	5	None
ACH Fed Transmission Summary Inq (ACHSM)		ACH, CANNEDQRY	17	None
ACH Member Inquiry		ACH, MBRINQ	147	Full Access
ACH Posting Controls Config		CONFIGS	5	None
ADB Calculator (Savings & Loans)		ANALYSIS, BUDGETING	3	Full Access
Add Manual ACH File to Warehouse		ACH	6	None

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THINGS JUST GOT ABOUT A THOUSAND PERCENT BETTER FOR YOUR SECURITY OFFICERS

- Releases will no longer change anyone's security settings – *tool #s and tool assignments are now permanent!*
- New programs added in CU*BASE releases will no longer be automatically assigned to any employees
  - "NEW" category will make it a breeze to see only the tools added in the most recent release
- "Dashboard" view to see who can do what, and who can't – *no more reports with cryptic columns of Ys and Ns*
- Search for employee IDs by name
- Jump to an ID in the list
- Sort your list the way you like
- Assign many tools to a single employee
- Assign many employees to the same tool
- Record start date, email address, and NMLSR# for all employees – *ready for your next custom form updates!*

Improvements for security officers and auditors

- Streamlining the CU*BASE Employee Security tools

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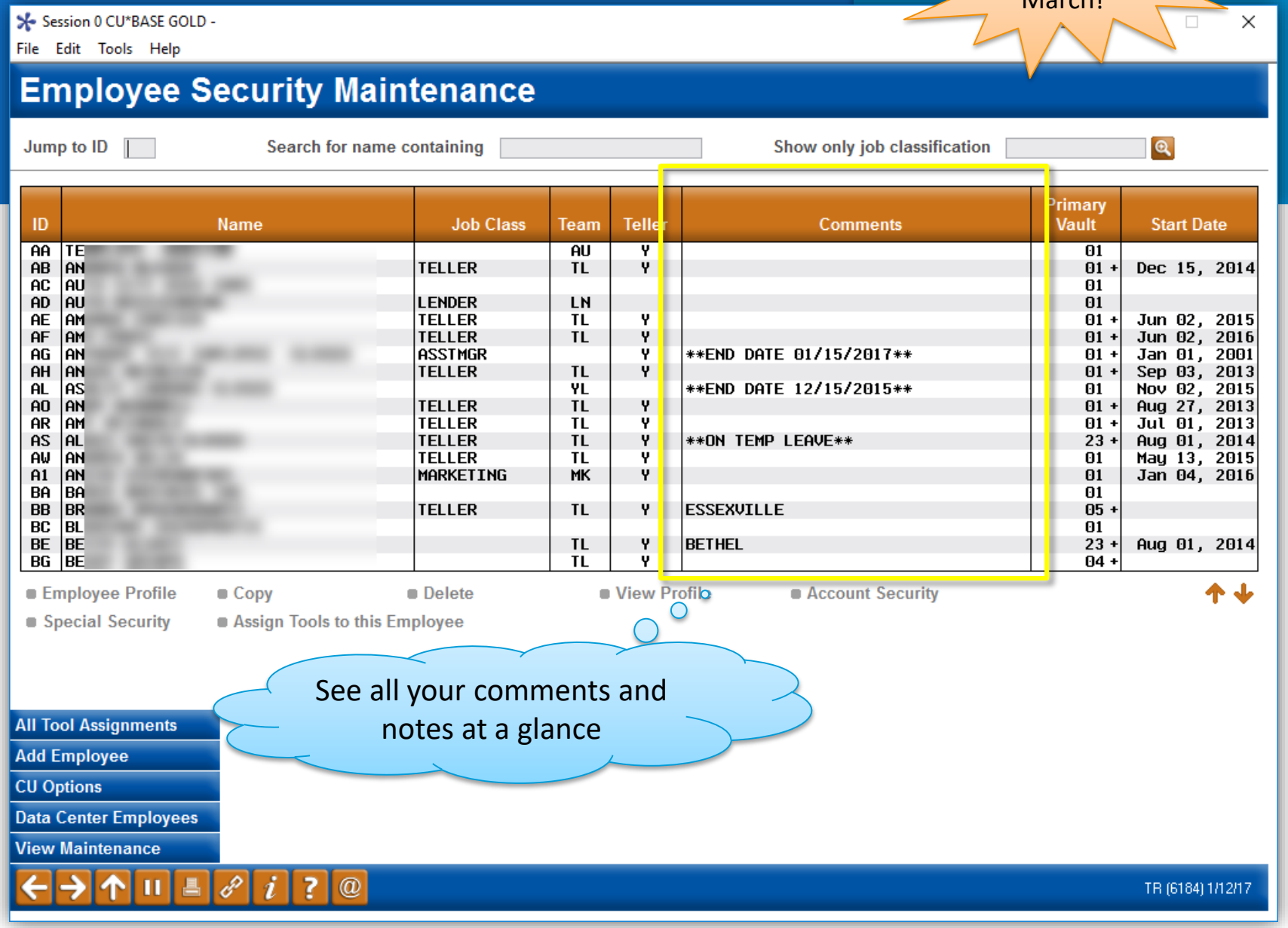

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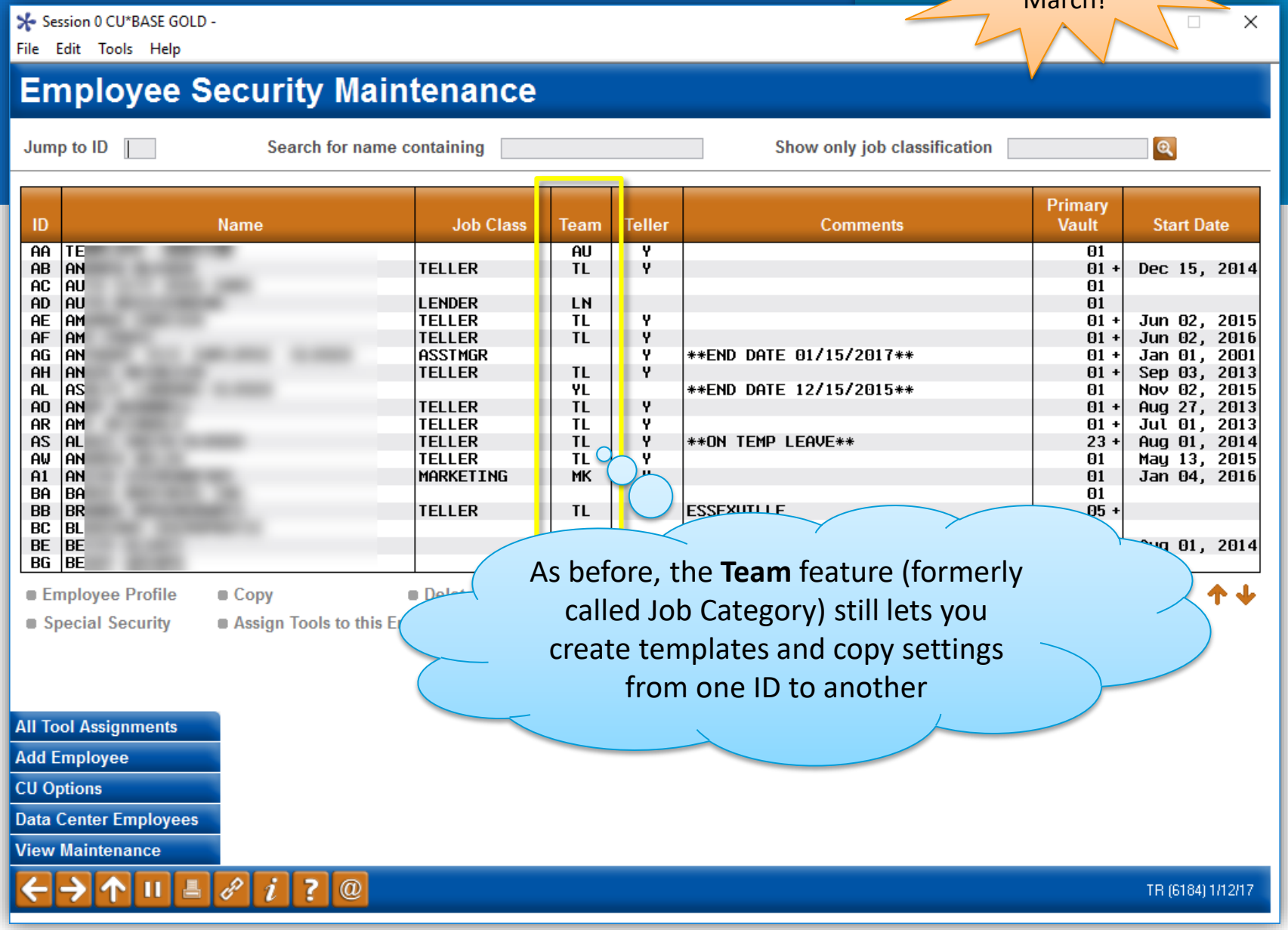

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NEW FEATURE!

Job Classifications will allow us to make recommendations to security officers about which tools should be assigned, based on job responsibilities *(more on these in a moment...)*

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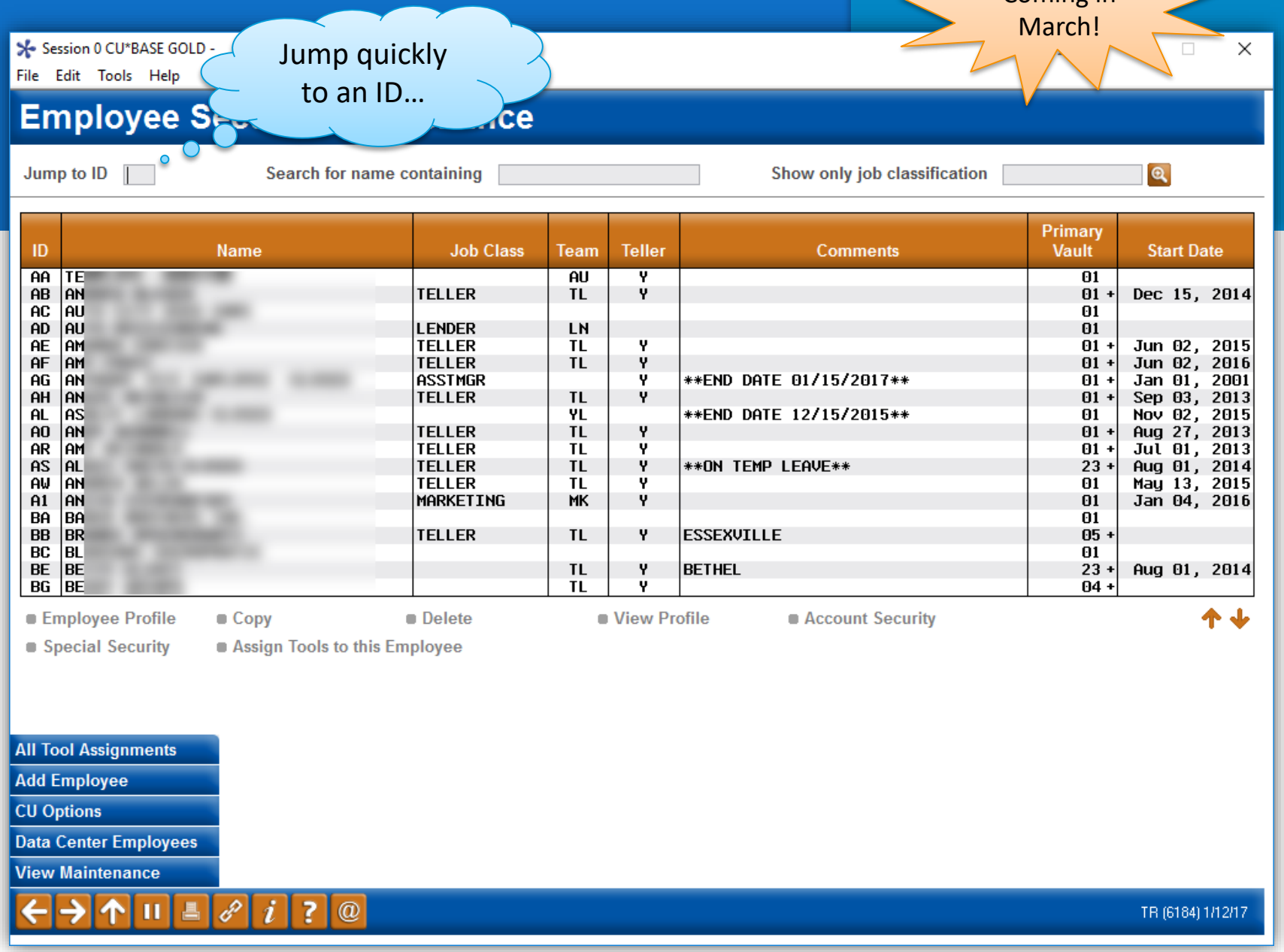

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- Streamlining the CU*BASE Employee Security tools

Coming in March!

Now let's take a look at the new data you can now record for this employee

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- More data about your employees

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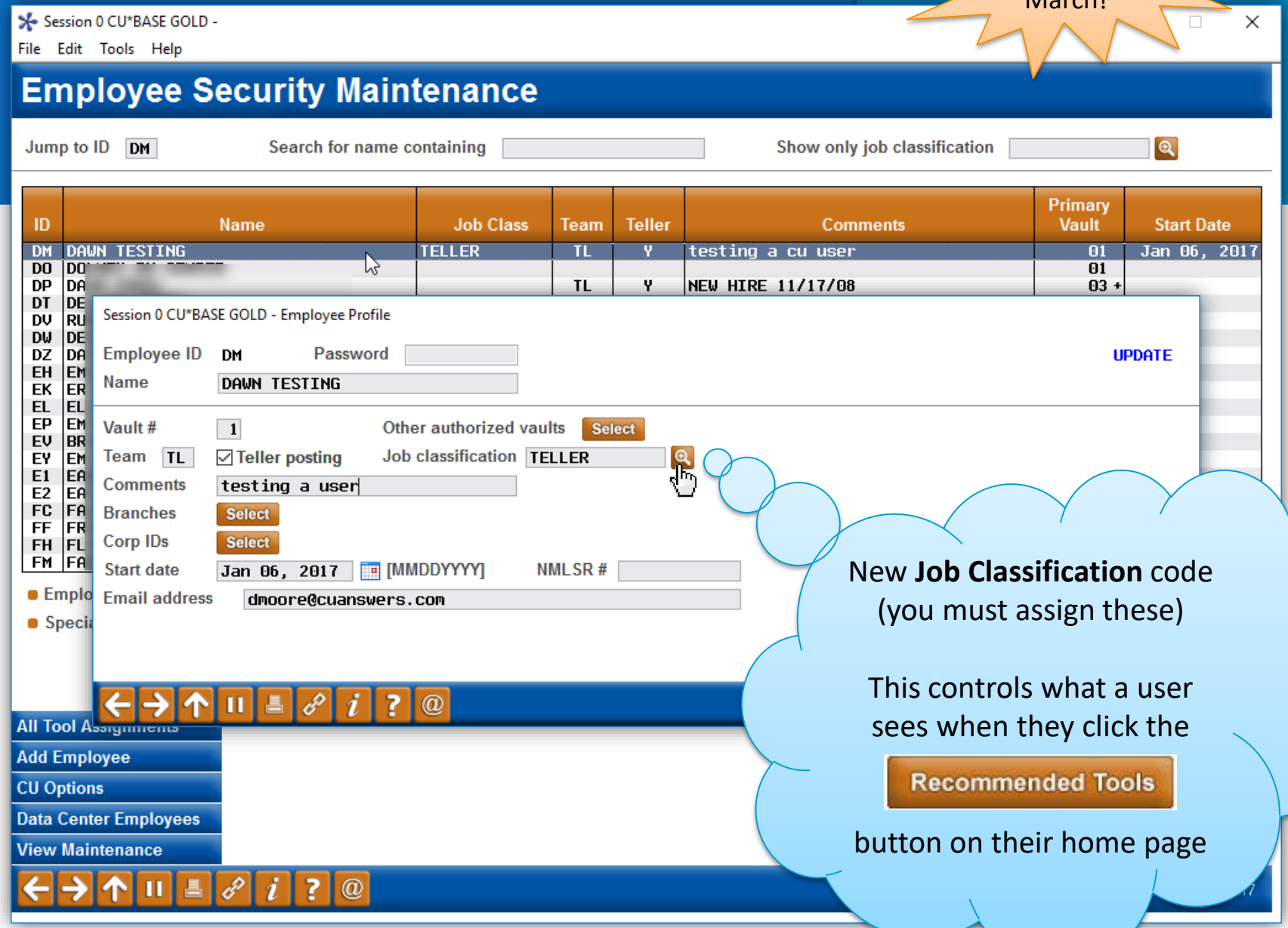

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- More da
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Coming in
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Improvements for security officers and auditors

- A whole new way to assign tools to your employees

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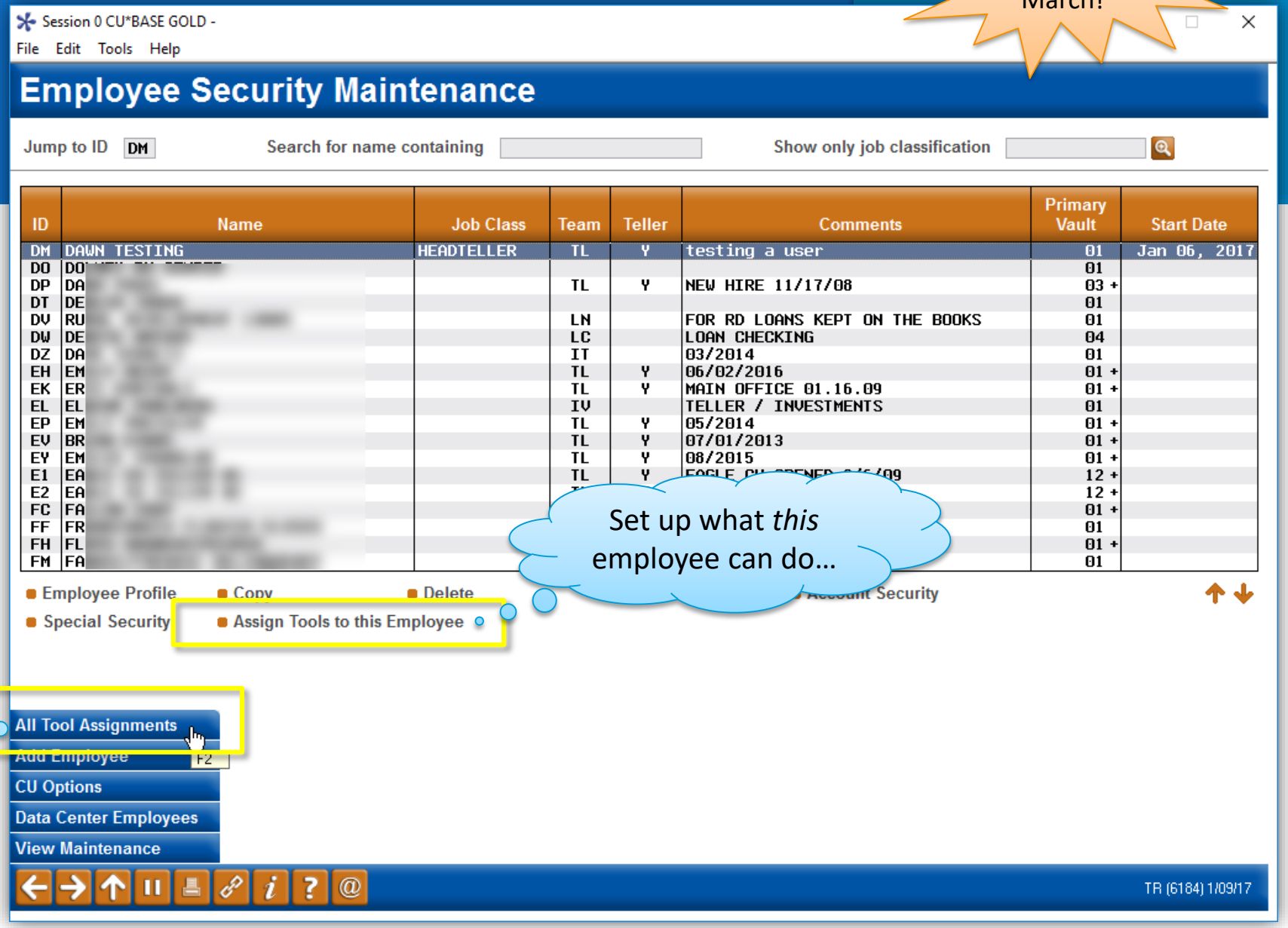
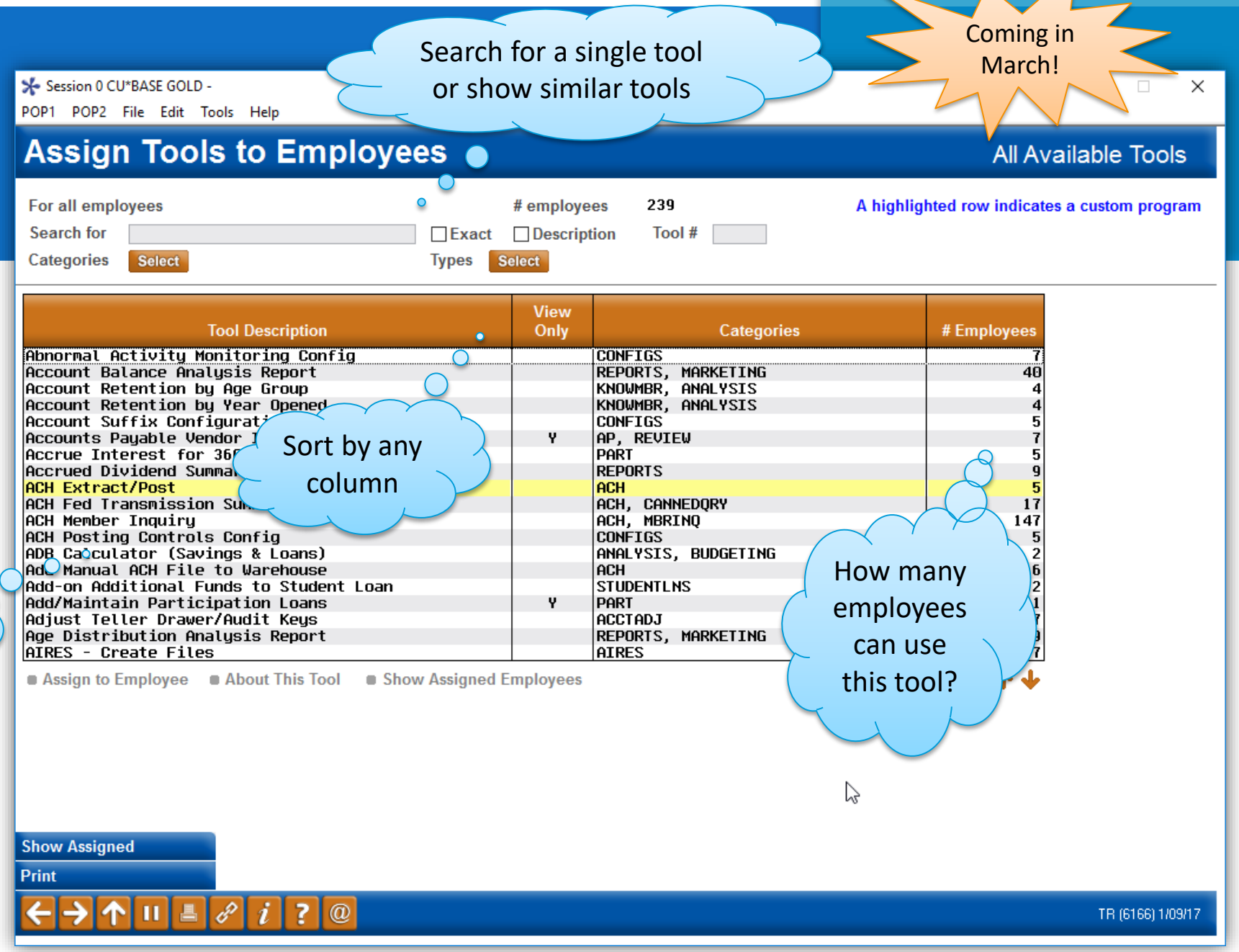


Set up what *this* employee can do…

…or work with what *all* your employees can do (let's try this one)

Assigning tools to your employees

- A whole new way to assign tools to your employees



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- More visibility of who can use your tools

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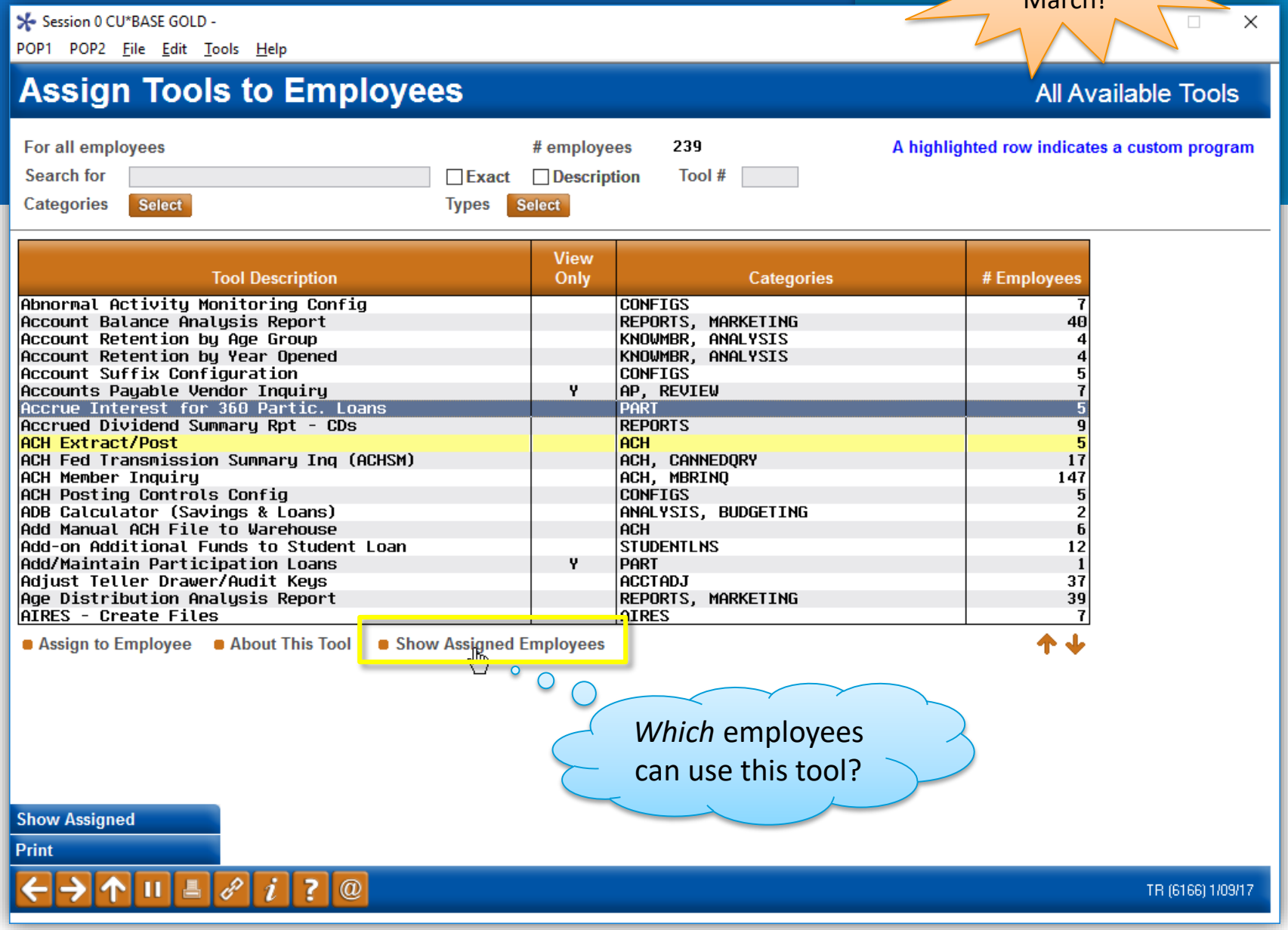

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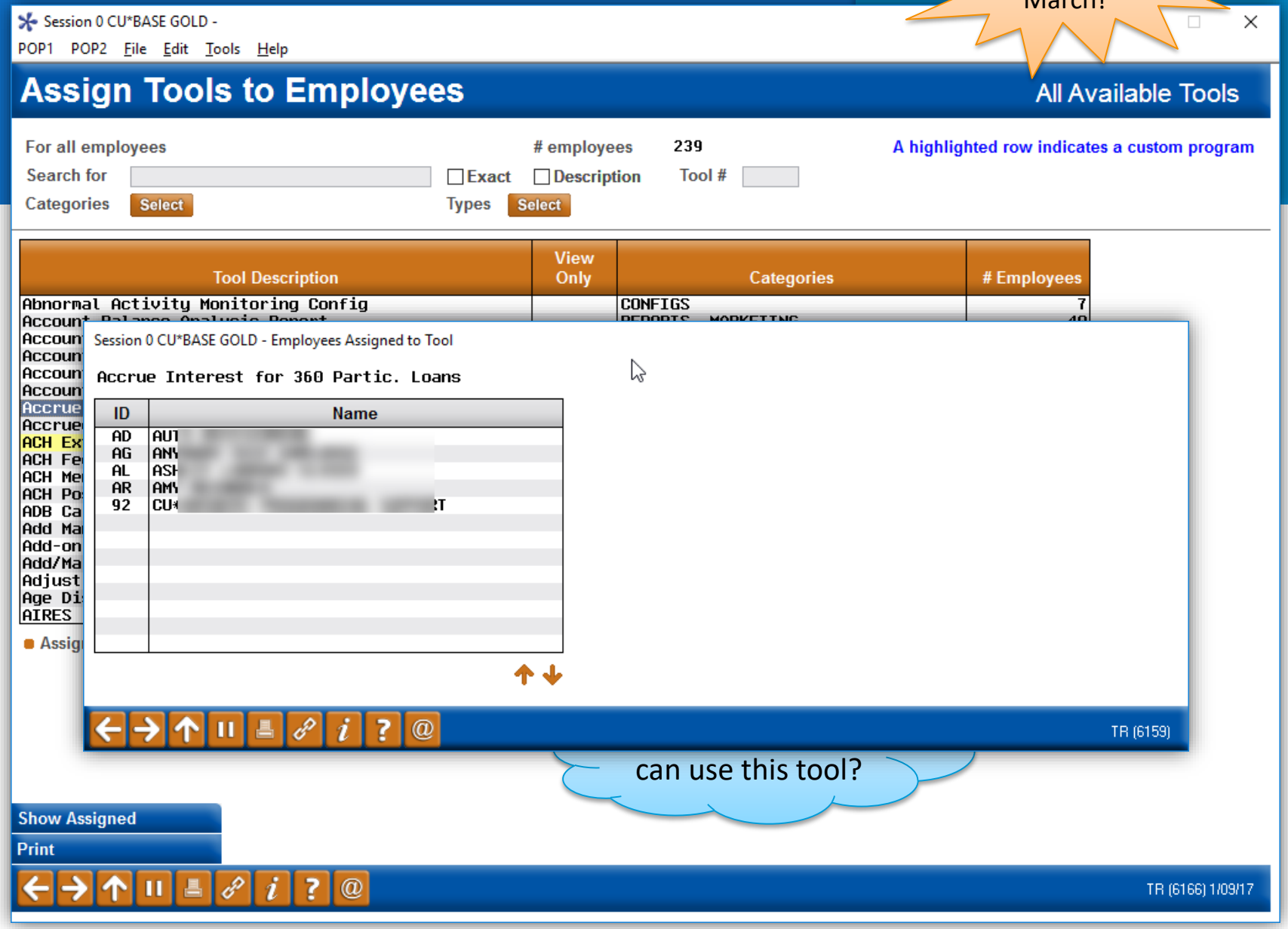
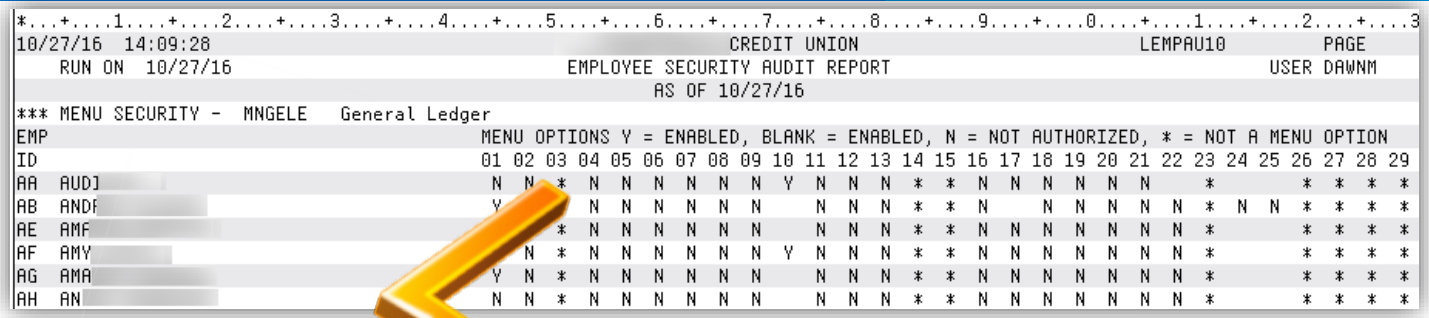


New Reports for Auditing your Security Settings

BEYOND THE DASHBOARD



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*...+....1....+....2....+....3....+....4....+....5....+....6....+....7....+....8....+....9....+....0....+....1....+....2....+....3
10/27/16  14:09:28                          CREDIT UNION                          LEMPAU10        PAGE
    RUN ON  10/27/16                  EMPLOYEE SECURITY AUDIT REPORT                            USER DAWNM
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*** MENU SECURITY -  MNGELE   General Ledger
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AA  AUDJ                              N  N  *  N  N  N  N  N  N  Y  N  N  N  *  *  N  N  N  N  N  N     *        *  *  *  *
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AF  AMY                                  N  *  N  N  N  N  N  N  Y  N  N  N  *  *  N  N  N  N  N  N  N  *        *  *  *  *
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AH  AN                                   N  N  *  N  N  N  N  N  N     N  N  N  *  *  N  N  N  N  N  N  N  *        *  *  *  *
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*...+....1....+....2....+....3....+....4....+....5....+....6....+....7....+....8....+....0....+....1....+....2....+....3
 12/05/16 17:12:06                    RELEASE CONTROL CREDIT UNION                    LEMPAU01              PAGE
     Run On 12/05/16                   ASSIGNED TOOLS AUDIT REPORT                                    USER DAWNM
Category:  GL          General Ledger Inquiry & Posting Tools
Tool
Number  Title                                        Shortcut
   60   GL Journal History Inquiry                   GLINQ
        Employee ID   Name                               Job Classification
             DM       DAWN MOORE TESTING LONG (DM)       AUDITOR
             92       CU*ANSWERS PROGRAMMING SUPPORT     TELLER/MSR
             DX       DAWN'S SECOND ID TESTING DX        MANAGER
             MX       MIKE WARREN TESTING
             89       CU*ANSWERS CLIENT SUPPORT          MANAGER
             AA       AMY TESTPERSON                     AUDITOR
             AB       AMANDA TELLER                      TELLER/MSR
   61   Create/Post GL Journal Entries               GLPOST
        Employee ID   Name                               Job Classification
             DM       DAWN MOORE TESTING LONG (DM)       AUDITOR
             DX       DAWN'S SECOND ID TESTING DX        MANAGER
             MX       MIKE WARREN TESTING
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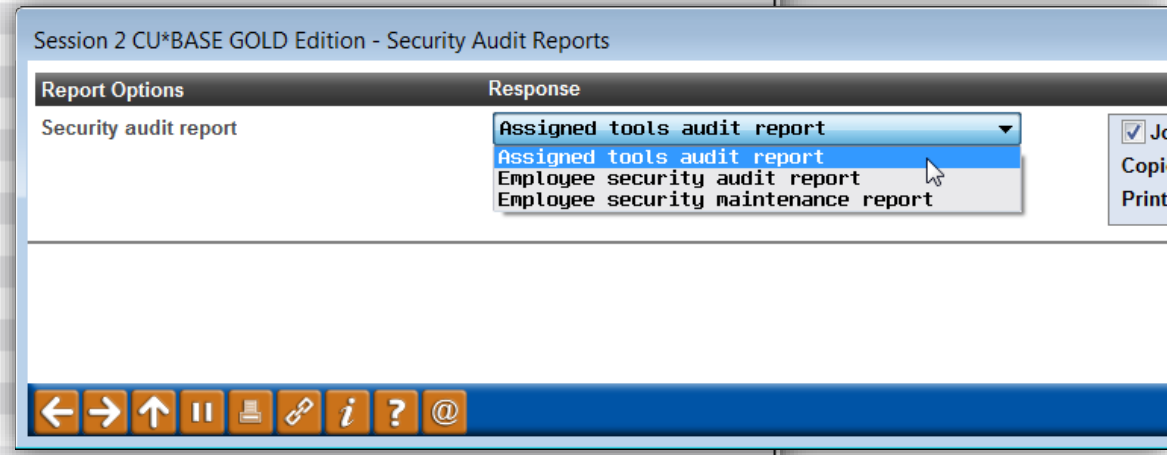
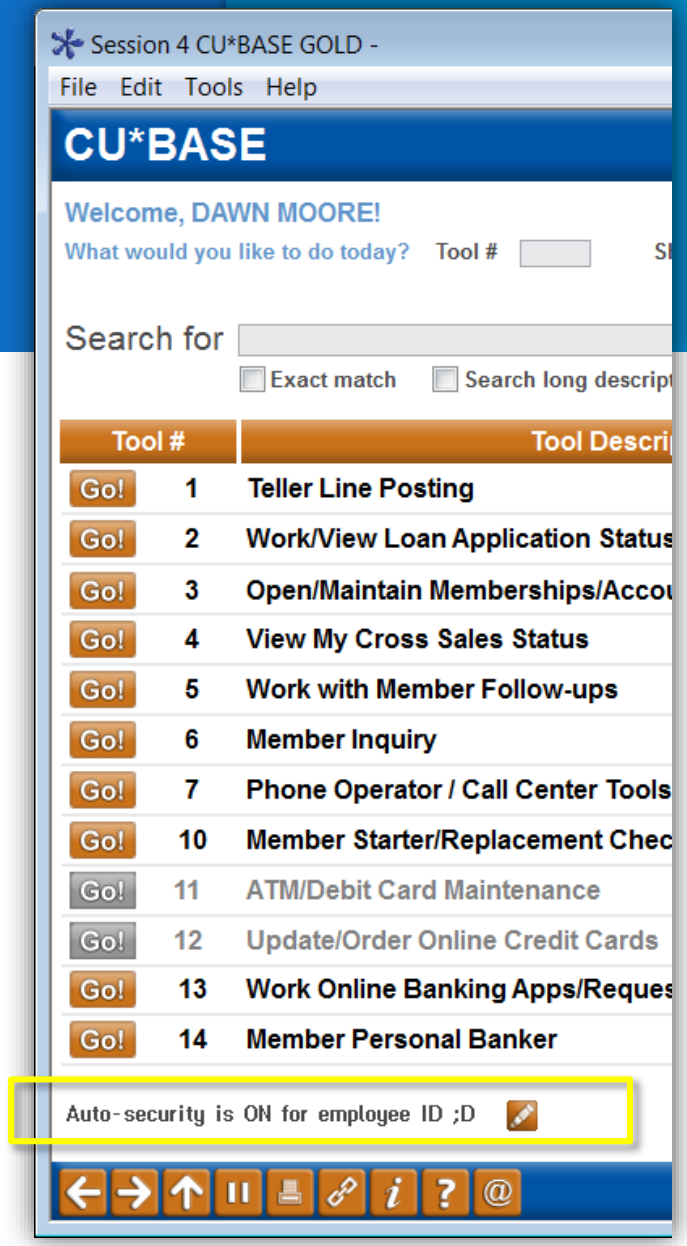


Understanding the Changes to Auto Security

- The auto-security feature is now controlled via a button on the home page
  - If it's on, you don't have to enter your ID and password over and over every time you launch a tool
  - **CU*BASE still checks against your access privileges, though!**
- Employees can still set Preferences to activate auto-security automatically after logging in
- Auto-security will be available to all employees, unless you deactivate it (for *everyone*) in CU*BASE Employee Security (CU Options)



Changes to Employee Security

Converting Your Existing Access Settings

Converting your existing security settings

YOU'LL BE READY TO GO ON RELEASE DAY

- This report will be in your **HOLDxx output queue** on the day of the release
  - If you want it routed to CU*Spy, you can move this report to MONTHxx or another OUTQ

All existing your permissions will be translated to the new structure for you

```
*...+....1....+....2....+....3....+....4....+....5....+....6....+....7....+....8....+....9....+....1....+....3
 1/04/17  9:56:27      UPDATE                          CREDIT UNION                  CNV37579ES            PAGE
    Run On  1/04/17                          EMPLOYEE SECURITY CONVERSION REPORT                          USER BRENDAB
OLD Menu: MNACCK  Option#: 01  Program: UAPOPCL          OLD Desc: Work With Outstanding Invoices          Parm:
Assigned to: Employee ID  Name                           NEW Desc: Work With Outstanding Invoices          NEW TOOL #:   998
                   JF     JEF
                   05     DON
                   16     GRE
                   19     KAR
                   37     LIS
                   89     CU*
                   9H     XTE
                   92     CU*
OLD Menu: MNACCK  Option#: 02  Program: PAPSEFMCL        OLD Desc: Select Invoices For Payment             Parm:
Assigned to: Employee ID  Name                           NEW Desc: Select Invoices For Payment             NEW TOOL #:   787
                   JF     JEF
                   MA     BRA
                   05     DON
                   16     GRE
                   19     KAR
```

Converting your existing security settings

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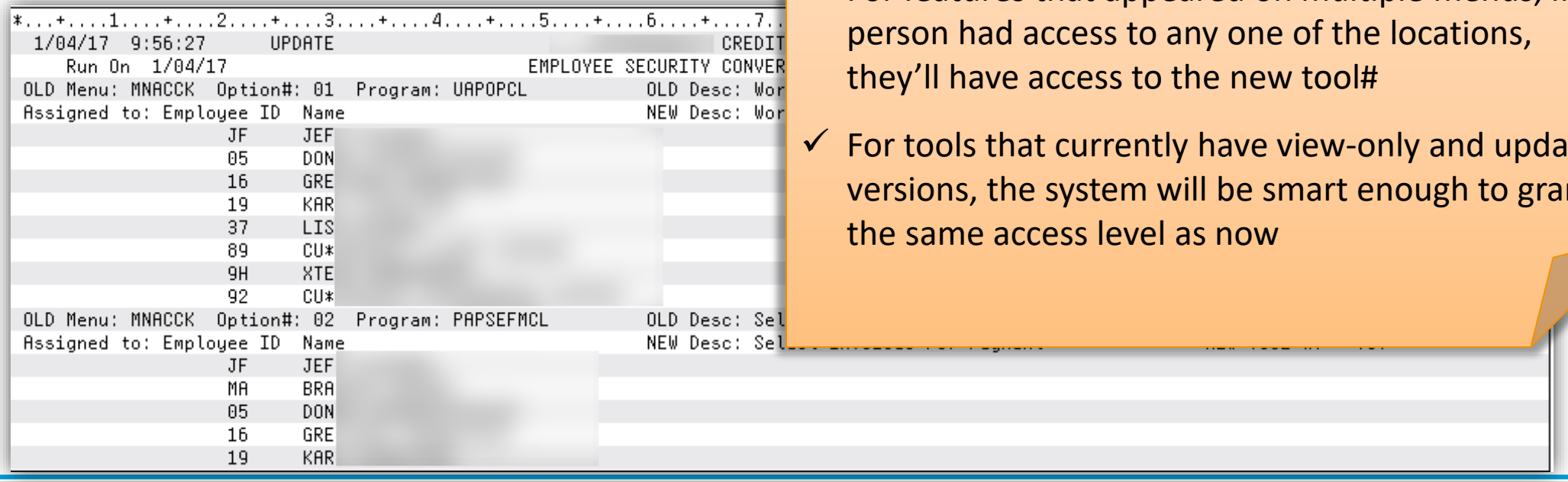

Tips:

- ✓ If a person had access to either the speed sequence OR the menu option, they'll have access to the new tool# *(remember, this automatically gives them access to the shortcut, too!)*
- ✓ For features that appeared on multiple menus, if a person had access to any one of the locations, they'll have access to the new tool#
- ✓ For tools that currently have view-only and update versions, the system will be smart enough to grant the same access level as now

Keeping up with news about the rollout…

https://www.cuanswers.com/resources/kitchen/

Ask us about an Employee CU*BASE Security Review for your credit union!

AuditLink

auditlink.cuanswers.com