

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

NEW^g NAVIGATION

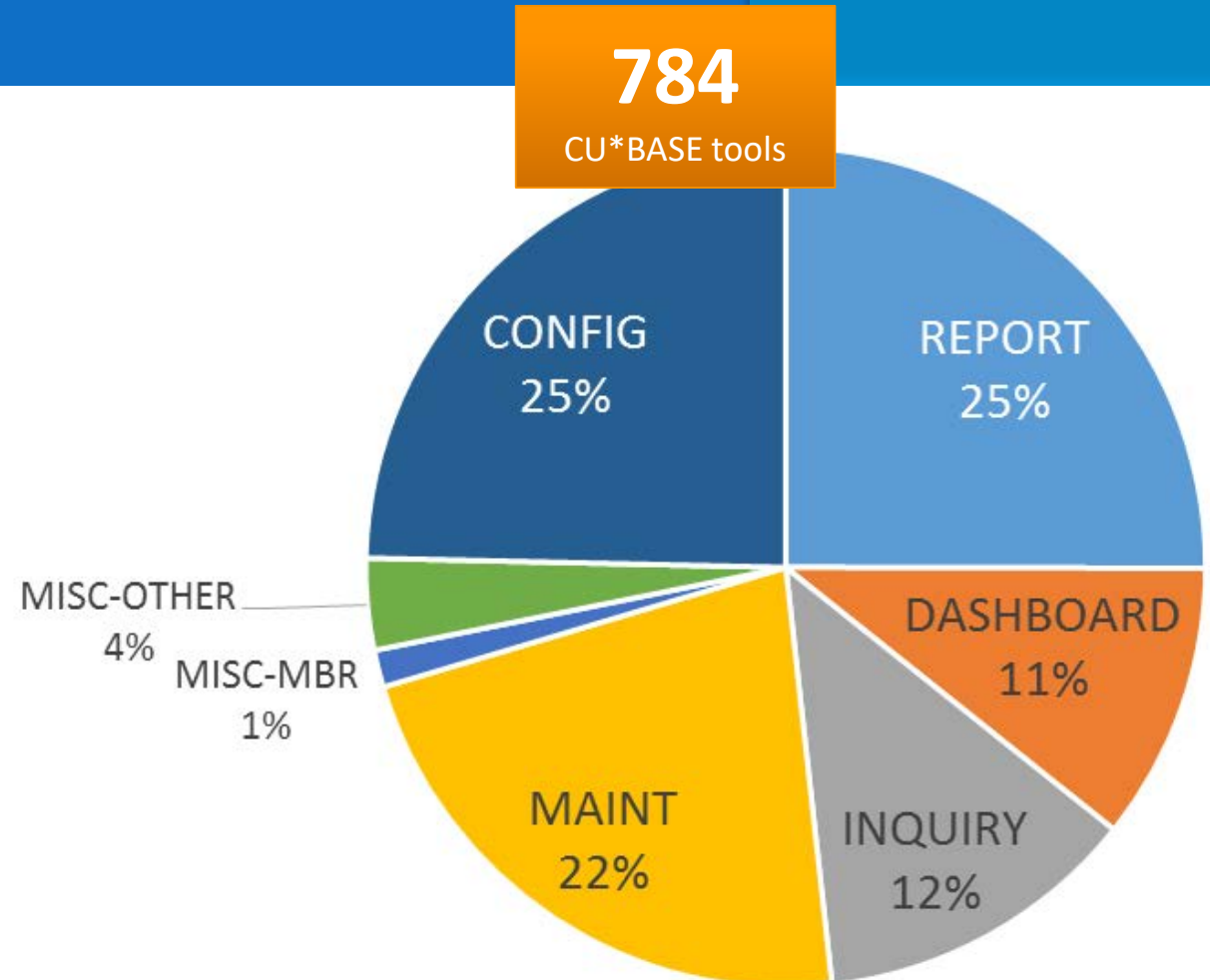
COMING
MARCH 2017



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- ❑ Permanent tool #s we can reference in our help doc and release summaries – *no more outdated references*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

Coming in March!

Session 0 CU*BASE GOLD -
File Edit Tools Help

CU*BASE

All Available Tools

Welcome, DAWN TESTING!
What would you like to do today? Tool # Shortcut

Search for
☐ Exact match ☐ Search long description

Filter by Type
Filter by Category
Refresh Filters
Total # of tools: 765

My Favorite Tools
All My Tools
Recommended Tools
All Available Tools

Tool #	Tool Description	Shortcut	More
Go! 1	Teller Line Posting	TELLER	i ★
Go! 2	Work/View Loan Application Status	LOANQ	i ★
Go! 3	Open/Maintain Memberships/Accounts	OPEN	i ★
Go! 4	View My Cross Sales Status	MYXSALES	i ★
Go! 5	Work with Member Follow-ups	TRACKERS	i ★
Go! 6	Member Inquiry	INQ	i ★
Go! 7	Phone Operator / Call Center Tools	PHONE	i ★
Go! 10	Member Starter/Replacement Checks	STARTER	i ★
Go! 11	ATM/Debit Card Maintenance	CARD	i ★
Go! 12	Update/Order Online Credit Cards	CC	i ★
Go! 13	Work Online Banking Apps/Requests	ONLINE	i ★
Go! 14	Member Personal Banker	PB	i ★

Auto-security is ON for employee ID DM

CU*BASE gold edition

TR (6139) 1/12/17

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**
- ❑ Driven by a powerful new search engine
 - Shorter learning curve for new users



Session 0 CU*BASE GOLD -
File Edit Tools Help

CU*BASE

All Available Tools

Welcome, DAWN TESTING!
What would you like to do today? Tool # Shortcut

Search for
☐ Exact match ☐ Search long description

Filter by Type ☐
Filter by Category ☐
Refresh Filters

Total # of tools: 765

My Favorite Tools
All My Tools
Recommended Tools
All Available Tools

Need Help?
New navigation how-to video >
Navigating the home page
See what's new >
Work My Follow-Ups

Tool #	Tool Description	Shortcut	More
Go! 1	Teller Line Posting		i ★
Go! 2	Work/View Loan Application Sta		i ★
Go! 3	Open/Maintain Memberships/Acc		i ★
Go! 4	View My Cross Sales Status	MYXSALES	i ★
Go! 5	Work with Member Follow-ups	TRACKERS	i ★
Go! 6	Member Inquiry	INQ	i ★
Go! 7	Phone Operator / Call Center Tools	PHONE	i ★
Go! 10	Member Starter/Replacement Checks	STARTER	i ★
Go! 11	ATM/Debit Card Maintenance	CARD	i ★
Go! 12	Update/Order Online Credit Cards	CC	i ★
Go! 13	Work Online Banking Apps/Requests	ONLINE	i ★
Go! 14	Member Personal Banker	PB	i ★

Auto-security is ON for employee ID DM

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Search tools built right into the home page

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**
- ❑ Driven by a powerful new search engine
 - Shorter learning curve for new users



Session 0 CU*BASE GOLD -

File Edit Tools Help

CU*BASE

All Available Tools

Welcome, DAWN TESTING!

What would you like to do today? Tool # Shortcut

Search for

☐ Exact match ☐ Search long description

Filter by Type ☐ Filter by Category ☐ Refresh Filters

Total # of tools: 11

Tool #	Tool Description	Shortcut	More
Go! 51	Miscellaneous Loan Maintenance	LOANMISC	i ★
Go! 222	Collateral Insurance Agent Configuration		i ★
Go! 223	Collateral Type Configuration		i ★
Go! 224	Collateral/VIN# Lookup (CLML)	VININQ	i ★
Go! 490	Medallion Collateral Configuration		i ★
Go! 491	Medallion Collateral Inquiry		i ★
Go! 587	Pledged Collateral Information Report		i ★
Go! 713	Re-Price Medallion Collateral		i ★
Go! 826	Stock Secured Information Report		i ★
Go! 827	Stock Type Configuration		i ★
Go! 828	Stock/LOC Disbursement Value Adjustment		i ★

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Need Help?

New navigation how-to video >

Navigating the home page

See what's new >

Work My Follow-Ups

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A new way to navigate to CU*BASE tools

- Flexible interface with an “it’s me” approach – organize your tools the way you like

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

Coming in March!

Session 0 CU*BASE GOLD -
File Edit Tools Help

CU*BASE

All Available Tools

Welcome, DAWN TESTING!
What would you like to do today? Tool # Shortcut

Search for
☐ Exact match ☐ Search long description

Filter by Type ☐
Filter by Category ☐
Refresh Filters

Total # of tools: 765

My Favorite Tools
All My Tools
Recommended Tools
All Available Tools

Tool #	Tool Description	Shortcut	More
Go! 1	Teller Line Posting	TELLER	i ★
Go! 2	Work/View Loan Application Status	LOANQ	
Go! 3	Open/Maintain Memberships/Accounts	OPEN	
Go! 4	View My Cross Sales Status	MYXSALES	
Go! 5	Work with Member Follow-ups	TRACKERS	
Go! 6	Member Inquiry	INQ	i ★
Go! 7	Phone Operator / Call Center Tools	PHONE	i ★
Go! 10	Member Starter/Replacement Checks	STARTER	i ★
Go! 11	ATM/Debit Card Maintenance	CARD	i ★
Go! 12	Update/Order Online Credit Cards	CC	i ★
Go! 13	Work Online Banking Apps/Requests	ONLINE	i ★
Go! 14	Member Personal Banker	PB	i ★

Security is ON for employee ID DM

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Show just the tools you want to see...

A new way to navigate to CU*BASE tools

- Flexible interface with an “it’s me” approach – organize your tools the way you like

...see how those grayed-out ones disappeared?

Coming in March!

Session 0 CU*BASE GOLD -

File Edit Tools Help

CU*BASE

All My Tools

Welcome, DAWN TESTING!

What would you like to do today? Tool # Shortcut

Search for

☐ Exact match ☐ Search long description

Filter by Type ☐ Filter by Category ☐ Refresh Filters

My Favorite Tools

All My Tools

Recommended Tools

Total # of tools: 20

Tool #	Tool Description	Shortcut	
Go! 1	Teller Line Posting	TELLER	i ★
Go! 2	Work/View Loan Application Status	LOANQ	i ★
Go! 3	Open/Maintain Memberships/Accounts	OPEN	i ★
Go! 4	View My Cross Sales Status	MYXSALES	i ★
Go! 5	Work with Member Follow-ups	TRACKERS	i ★
Go! 6	Member Inquiry	INQ	i ★
Go! 7	Phone Operator / Call Center Tools	PHONE	i ★
Go! 10	Member Starter/Replacement Checks	STARTER	i ★
Go! 13	Work Online Banking Apps/Requests	ONLINE	i ★
Go! 14	Member Personal Banker	PB	i ★
Go! 15	Update Membership Information	UMBR	i ★
Go! 20	Update Account Information	ACCT	i ★

Auto-security is ON for employee ID DM [✎](#)

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Need Help?

New navigation how-to video >

Navigating the home page

See what's new >

Work My Follow-Ups

So if I switch to “All My Tools”...

A new way to navigate to CU*BASE tools

- Flexible interface with an “it’s me” approach – organize your tools the way you like

Permanent tool #s that we can refer to in doc

More shortcuts than ever for your keyboard power users

Click to sort by any column

Coming in March!

Session 0 CU*BASE GOLD -
File Edit Tools Help

CU*BASE

All Available Tools

Welcome, DAWN TESTING!
What would you like to do today? Tool # Shortcut

Search for
☐ Exact match ☐ Search long description

Filter by Type ☐
Filter by Category ☐
Refresh Filters

Total # of tools: 765

My Favorite Tools
All My Tools
Recommended Tools
All Available Tools

Tool #	Tool Description	Shortcut	More
Go! 1	Teller Line Posting	TELLER	i ★
Go! 2	Work/View Loan Application Status		i ★
Go! 3	Open/Maintain Memberships/Accounts		i ★
Go! 4	View My Cross Sales Status	CROSSSALES	i ★
Go! 5	Work with Member Follow-ups	TRACKERS	i ★
Go! 6	Member Inquiry	INQ	i ★
Go! 7	Phone Operator / Call Center Tools	PHONE	i ★
Go! 10	Member Starter/Replacement Checks	STARTER	i ★
Go! 11	ATM/Debit Card Maintenance	CARD	i ★
Go! 12	Update/Order	CC	i ★
Go! 13	Work On	ONLINE	i ★
Go! 14	Member P	PB	i ★

Auto-security is ON for employee ID Dm

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A new way to navigate to CU*BASE tools

- Flexible interface with an “it’s me” approach – organize your tools the way you like

Coming in March!

Session 0 CU*BASE GOLD -
File Edit Tools Help

CU*BASE

All Available Tools

Welcome, DAWN TESTING!
What would you like to do today? Tool # Shortcut

Search for
☐ Exact match ☐ Search long description

Filter by Type ☐
Filter by Category ☐
Refresh Filters

of tools: 765

Tool #	Tool Description	More
Go! 1	Teller Line Posting	i ★
Go! 2	Work/View Loan Application Status	i ★
Go! 3	Open/Maintain Memberships/Accounts	i ★
Go! 4	View My Cross Sales Status	i ★
Go! 5	Work with Member Follow-ups	i ★
Go! 6	Member Inquiry	i ★
Go! 7	Phone Operator / Call Center Tools	i ★
Go! 10	Member Starter/Replacement Checks	i ★
Go! 11	ATM/Debit Card Maintenance	i ★
Go! 12	Update/Order Online Credit Cards	i ★
Go! 13	Work Online Banking Apps/Requests	i ★
Go! 14	Member Personal Banker	i ★

Flag your favorites and make your own custom “menu”

Auto-security is ON for employee ID DM [i](#)

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A new way to navigate to CU*BASE tools

- Flexible interface with an “it’s me” approach – organize your tools the way you like



Session 0 CU*BASE GOLD -

File Edit Tools Help

CU*BASE

My Favorite Tools

Welcome, DAWN TESTING!
What would you like to do today? My # Shortcut

Search for

☐ Exact match ☐ Search long description

Total # of tools: 4

My #	Tool Description	Shortcut	More
Go! 1	Work/View Loan Application Status	LOANQ	i ★
Go! 2	Member Starter/Replacement Checks	STARTER	i ★
Go! 3	Teller Line Posting	TELLER	i ★
Go! 4	Print Loan Forms	FORMS	i ★

Filter by Type

Filter by Category

Refresh Filters

My Favorite Tools

All My Tools

Recommended Tools

All Available Tools

Need Help?

New navigation how-to video >

Navigating the home page

See what's new >

Work My Follow-Ups

Auto-security is OFF for employee ID DM

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A new way to find what you need

- Search by key word
- OR
- Filter by Category



Session 0 CU*BASE GOLD -
File Edit Tools Help

CU*BASE

All Available Tools

Welcome, DAWN TESTING!
What would you like to do today? Tool # Shortcut

Search for
☐ Exact match ☐ Search long description

Filter by Type ☐
Filter by Category ☐
Refresh Filters

Total # of tools: 765

My Favorite Tools
All My Tools
Recommended Tools
All Available Tools

Need Help?
New navigation how-to video >
Navigating the home page
See what's new >
Work My Follow-Ups

Tool #	Tool Description	Shortcut	More
Go! 1	Teller Line Posting	TELLER	i ★
Go! 2	Work/View Loan Application Status	LOANQ	i ★
Go! 3	Open/Maintain Memberships/Accounts	OPEN	i ★
Go! 4	View My Cross Sales Status	MYXSALES	i ★
Go! 5	Work with Member Follow-ups	TRACKERS	i ★
Go! 6	Member Inquiry	INQ	i ★
Go! 7	Phone Operator / Call Center Tools	PHONE	i ★
Go! 10	Member Starter/Replacement Checks	STARTER	i ★
Go! 11	ATM/Debit Card Maintenance	CARD	i ★
Go! 12	Update/Order Online Credit Cards	CC	i ★
Go! 13	Work Online Banking Apps/Requests	ONLINE	i ★
Go! 14	Member Personal Banker	PB	i ★

Auto-security is ON for employee ID DM

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A new way to find what you need

□ Search by key word

OR

□ Filter by Category



Session 0 CU*BASE GOLD -

File Edit Tools Help

CU*BASE

All Available Tools

Welcome, DAWN TESTING!

What would you like to do today? Tool # Shortcut

Search for

☐ Exact match ☐ Search long description

Filter by Type ☐ Filter by Category ☐ Refresh Filters

Total # of tools: 765

My Favorite Tools

All My Tools

Recommended Tools

All Available Tools

Need Help?

New navigation how-to video >

Navigating the home page

See what's new >

Work My Follow-Ups

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Filters to see all related

Session 0 CU*BASE GOLD - Tool Category Code Selection

Jump to description starting with

Jump to code starting with

Search for description containing

Code	Description
INDIRECT	Indirect Lending/Dealer Processing Tools
INVEST	Investment Subsidiary Processing Tools
KNOWMBR	Know-Your-Member Analysis Tools
LFP	Learn From a Peer/Network Analysis Tools
LOANS	Lending/Loan Account Tools
MARKETING	Marketing Processing & Analysis Tools
MBRINQ	Member Inquiries/Lookups
MBRSRV	Member Service Tools
OFAC	OFAC Data Match Tools
OFFICE	General Office & Workstation Functions
ONLINEBANK	Online/Mobile Banking Tools & Analyses
PART	Participation Loan Processing Tools
PAYROLL	Payroll Processing Tools

Select

Select All Unselect All

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A new way to find what you need

□ Search by key word

OR

□ Filter by Category



Session 0 CU*BASE GOLD -

File Edit Tools Help

CU*BASE

All Available Tools

Welcome, DAWN TESTING!

What would you like to do today? Tool # Shortcut

Search for

☐ Exact match ☐ Search long description

Total # of tools: 45

Filter by Type ☐ Filter by Category ☒ Refresh Filters

My Favorite Tools
All My Tools
Recommended Tools
All Available Tools

Tool #	Tool Description	Shortcut	More
Go! 1	Teller Line Posting	TELLER	i ★
Go! 3	Open/Maintain Memberships/Accounts	OPEN	i ★
Go! 7	Phone Operator / Call Center Tools	PHONE	i ★
Go! 10	Member Starter/Replacement Checks	STARTER	i ★
Go! 13	Work Online Banking Apps/Requests	ONLINE	i ★
Go! 14	Member Personal Banker	PB	i ★
Go! 21	Print Misc Member Account Forms	TIS	i ★
Go! 22	Close Memberships/Accounts	CLOSE	i ★
Go! 30	Member Account Adjustment (Coded)	ADJ	i ★
Go! 31	Reverse Tran/Adjust Drawer (Same Day)	REVTLR	i ★
Go! 33	Teller Drawer Control/Inquiry	TLRCTL	i ★
Go! 71	Stop Payment on Member Check/Draft	STOP	i ★

Auto-security is ON for employee ID DM

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Need Help?
New navigation how-to video >
Navigating the home page
See what's new >
Work My Follow-Ups

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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

Coming in March!

Session 0 CU*BASE GOLD -
File Edit Tools Help

CU*BASE

All Available Tools

Welcome, DAWN TESTING!
What would you like to do today? Tool # Shortcut

Search for
☐ Exact match ☐ Search long description

Filter by Type ☐
Filter by Category ☐
Refresh Filters

Total # of tools: 765

My Favorite Tools
All My Tools
Recommended Tools
All Available Tools

Tool #	Tool Description	Shortcut	More
Go! 1	Teller Line Posting	TELLER	i ★
Go! 2	Work/View Loan Application Status	LOANQ	i ★
Go! 3	Open/Maintain Memberships/Accounts	OPEN	i ★
Go! 4	View My Cross Sales Status	MYXSALES	i ★
Go! 5	Work with Member Follow-ups	TRACKERS	i ★
Go! 6	Member Inquiry	INQ	i ★
Go! 7	Phone Operator / Call Center Tools	PHONE	i ★
Go! 10	Member Starter/Replacement Checks	STRT	i ★
Go! 11	ATM/Debit Card Maintenance		i ★
Go! 12	Update/Order Online Credit Cards		i ★
Go! 13	Work Online Banking Apps/Requests		i ★
Go! 14	Member Personal Banker	PB	i ★

Auto-security is ON for employee ID DM

Learn while you work

Need Help?
New navigation how-to video >
Navigating the home page
See what's new >
Work My Follow-Ups

CU*BASE gold edition

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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



Session 0 CU*BASE GOLD -

File Edit Tools Help

CU*BASE

All Available Tools

Welcome, DAWN TESTING!

What would you like to do today? Tool # Shortcut

Filter by Type ☐ My Favorite Tools

Filter by Category ☐ All My Tools

Search

Session 0 CU*BASE GOLD - About This Tool

Title Member Personal Banker Tool # 14

Shortcut PB My tool #

Description

A central starting point for many options a member can request, such as e-Statement (enrollment or change enrollment status), bill payment (enrollment or change status), audio response and online banking (activation/enrollments, change PIN or password, view password history), PIB (Personal Internet Branch) (change PIB password or view PIB username), e-Alerts and e-Notices (subscribe, change settings, view history), Account to Account (A2A) relationships (add, modify or remove), email address maintenance (mark as incorrect email address or update address), Debit Card Round-up (enroll or change transfer account), or to change the member's Reg E Opt In/Out preference. This option also allows you to configure See and Jump (See/Jump) permissions for a member.

Launch Now!

Program UPERBNKCL Member Personal Banker

Categories Member Service Tools, Online/Mobile Banking Tools & Analyses

Tool types Maintenance & Posting Programs

My Access to This Tool Full Access

14 Member Personal Banker PB

Auto-security is ON for employee ID DM

CU*BASE gold edition

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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

```
*...+...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 DAWN M
AS OF 10/27/16

*** MENU SECURITY - MNGELE General Ledger
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 * * * * *
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 N N N N N N N N * * N N N N N N * * * * *
AG AMA Y N * N N N N N N N N N N * * N N N N N N * * * * *
AH AN N N * N N N N N N N N N N * * N N N N N N * * * * *
```



* 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 Types

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
Add or Additional Funds to Student Loan		STUDENT LNS	13	Full Access

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

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

Session 0 CU*BASE GOLD - File Edit Tools Help

Employee Security Maintenance

Jump to ID Search for name containing Show only job classification

ID	Name	Job Class	Team	Teller	Comments	Primary Vault	Start Date
AA	TE		AU	Y		01	
AB	AN	TELLER	TL	Y	12/15/2014	01 +	
AC	AL					01	
AD	AL	LENDER	LN			01	
AE	AN	TELLER	TL	Y	06/02/2015	01 +	
AF	AN	TELLER	TL	Y	06/02/2015	01 +	
AG	AN	ASSTGR		Y	te	01 +	Jan 01, 2001
AH	AN	TELLER	TL	Y		01 +	
AL	AS		YL			01	
AO	AN	TELLER	TL	Y		01 +	
AR	AN	TELLER	TL	Y		01 +	
AS	AL	TELLER	TL	Y	8/17/2015 (3/16/16)	23 +	
AW	AN	TELLER	TL	Y	NEW HIRE 5-13-15	01	
A1	AN	MARKETING	MK	Y	01/04/2016	01	
BA	BF					01	
BB	BF	TELLER	TL	Y	ESSEXVILLE	05 +	
BC	BL					01	
BE	BE		TL	Y	08/01/2014 BETHEL	23 +	
BG	BE		TL	Y		04 +	

☐ Employee Profile ☐ Copy ☐ Delete ☐ View Profile ☐ Account Security
☐ Special Security ☐ Assign Tools to this Employee

All Tool Assignments
 Add Employee
 CU Options
 Data Center Employees
 View Maintenance

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TR (6184) 1/09/17

Improvements for security officers and auditors

- Streamlining the CU*BASE Employee Security tools



Session 0 CU*BASE GOLD -
File Edit Tools Help

Employee Security Maintenance

Jump to ID Search for name containing Show only job classification

ID	Name	Job Class	Team	Teller	Comments	Primary Vault	Start Date
AA	TE		AU	Y		01	
AB	AN	TELLER	TL	Y		01 +	Dec 15, 2014
AC	AU					01	
AD	AU	LENDER	LN			01	
AE	AM	TELLER	TL	Y		01 +	Jun 02, 2015
AF	AM	TELLER	TL	Y		01 +	Jun 02, 2016
AG	AN	ASSTMGR		Y	**END DATE 01/15/2017**	01 +	Jan 01, 2001
AH	AN	TELLER	TL	Y		01 +	Sep 03, 2013
AL	AS		YL		**END DATE 12/15/2015**	01	Nov 02, 2015
AO	AN	TELLER	TL	Y		01 +	Aug 27, 2013
AR	AM	TELLER	TL	Y		01 +	Jul 01, 2013
AS	AL	TELLER	TL	Y	**ON TEMP LEAVE**	23 +	Aug 01, 2014
AW	AN	TELLER	TL	Y		01	May 13, 2015
A1	AN	MARKETING	MK	Y		01	Jan 04, 2016
BA	BA					01	
BB	BR	TELLER	TL	Y	ESSEXVILLE	05 +	
BC	BL					01	
BE	BE		TL	Y	BETHEL	23 +	Aug 01, 2014
BG	BE		TL	Y		04 +	

Employee Profile Copy Delete View Profile Account Security
Special Security Assign Tools to this Employee

All Tool Assignments
Add Employee
CU Options
Data Center Employees
View Maintenance

See all your comments and notes at a glance

← → ↑ || 🖨️ 🔗 ⓘ ? @

TR (6184) 1/12/17

Improvements for security officers and auditors

- Streamlining the CU*BASE Employee Security tools

Coming in March!

Session 0 CU*BASE GOLD -

File Edit Tools Help

Employee Security Maintenance

Jump to ID

Search for name containing

Show only job classification

ID	Name	Job Class	Team	Teller	Comments	Primary Vault	Start Date
AA	TE		AU	Y		01	
AB	AN	TELLER	TL	Y		01 +	Dec 15, 2014
AC	AU					01	
AD	AU	LENDER	LN			01	
AE	AM	TELLER	TL	Y		01 +	Jun 02, 2015
AF	AM	TELLER	TL	Y		01 +	Jun 02, 2016
AG	AN	ASSTMGR		Y	**END DATE 01/15/2017**	01 +	Jan 01, 2001
AH	AN	TELLER	TL	Y		01 +	Sep 03, 2013
AL	AS		YL		**END DATE 12/15/2015**	01	Nov 02, 2015
AO	AN	TELLER	TL	Y		01 +	Aug 27, 2013
AR	AM	TELLER	TL	Y		01 +	Jul 01, 2013
AS	AL	TELLER	TL	Y	**ON TEMP LEAVE**	23 +	Aug 01, 2014
AW	AN	TELLER	TL	Y		01	May 13, 2015
A1	AN	MARKETING	MK	Y		01	Jan 04, 2016
BA	BA					01	
BB	BR	TELLER	TL	Y	ESSEXVILLE	01	
BC	BL					01	
BE	BE		TL	Y	BETHEL	01 +	Aug 01, 2014
BG	BE		TL	Y		+	

Employee Profile

Copy

Delete

View Profile

Account

Special Security

Assign Tools to this Employee

All Tool Assignments

Add Employee

CU Options

Data Center Employees

View Maintenance

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TR (6184) 1/12/17

NEW FEATURE!

Record all employee start dates; sort the list by this date

Improvements for security officers and auditors

- Streamlining the CU*BASE Employee Security tools



Session 0 CU*BASE GOLD -
File Edit Tools Help

Employee Security Maintenance

Jump to ID Search for name containing Show only job classification

ID	Name	Job Class	Team	Teller	Comments	Primary Vault	Start Date
AA	TE		AU	Y		01	
AB	AN	TELLER	TL	Y		01 +	Dec 15, 2014
AC	AU					01	
AD	AU	LENDER	LN			01	
AE	AM	TELLER	TL	Y		01 +	Jun 02, 2015
AF	AM	TELLER	TL	Y		01 +	Jun 02, 2016
AG	AN	ASSTMGR		Y	**END DATE 01/15/2017**	01 +	Jan 01, 2001
AH	AN	TELLER	TL	Y		01 +	Sep 03, 2013
AL	AS		YL		**END DATE 12/15/2015**	01	Nov 02, 2015
AO	AN	TELLER	TL	Y		01 +	Aug 27, 2013
AR	AM	TELLER	TL	Y		01 +	Jul 01, 2013
AS	AL	TELLER	TL	Y	**ON TEMP LEAVE**	23 +	Aug 01, 2014
AW	AN	TELLER	TL	Y		01	May 13, 2015
A1	AN	MARKETING	MK			01	Jan 04, 2016
BA	BA					01	
BB	BR	TELLER	TL		ESSEXVILLE	05 +	
BC	BL						
BE	BE						
BG	BE						

Employee Profile Copy
Special Security Assign Tools to this E

All Tool Assignments
Add Employee
CU Options
Data Center Employees
View Maintenance

As before, the **Team** feature (formerly called Job Category) still lets you create templates and copy settings from one ID to another

TR (6184) 1/12/17

Improvements for security officers and auditors

- Streamlining the CU*BASE Employee Security tools



Session 0 CU*BASE GOLD -
File Edit Tools Help

Employee Security Maintenance

Jump to ID

Search for name containing

Show only job classification

ID	Name	Job Class	Team	Teller	Comments	Primary Vault	Start Date
AA	TE		AU	Y		01	
AB	AN	TELLER	TL	Y		01 +	Dec 15, 2014
AC	AU					01	
AD	AU	LENDER	LN			01	
AE	AM	TELLER	TL	Y		01 +	Jun 02, 2015
AF	AM	TELLER	TL	Y		01 +	Jun 02, 2016
AG	AN	ASSTMGR		Y	**END DATE 01/15/2017**	01 +	Jan 01, 2001
AH	AN	TELLER	TL	Y		01 +	Sep 03, 2013
AL	AS		YL		**END DATE 12/15/2015**	01	Nov 02, 2015
AO	AN	TELLER	TL	Y		01 +	Aug 27, 2013
AR	AM	TELLER	TL	Y		01 +	Jul 01, 2013
AS	AL	TELLER	TL	Y	**ON TEMP LEAVE**	23 +	Aug 01, 2014
AW	AN	TELLER	TL	Y		01	May 13, 2015
A1	AN	MARKETING	MK	Y		01	Jan 04, 2016
BA	BA					01	
BB	BR	TELLER	TL	Y	ESSEXVILLE	05 +	
BC	BL					01	
BE	BE		TL	Y	DEUEL	23 +	Aug 01, 2014
BG	BE					04 +	

Employee Profile

Copy

Special Security

Assign

All Tool Assignments

Add Employee

CU Options

Data Center Employees

View Maintenance

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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...)

TR (6184) 1/12/17

Improvements for security officers and auditors

- Streamlining the CU*BASE Employee Security tools

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

Coming in March!

Session 0 CU*BASE GOLD -
File Edit Tools Help

Employee Security Maintenance

Jump to ID

Search for name containing

Show only job classification

ID	Name	Job Class	Team	Teller	Comments	Primary Vault	Start Date
DM	DAWN TESTING	TELLER	TL	Y	testing a cu user	01	Jan 06, 2017
DO	DO					01	
DP	DA		TL	Y	NEW HIRE 11/17/08	03 +	
DT	DE					01	
DV	RU				FOR RD LOANS KEPT ON THE BOOKS	01	
DW	DE				LOAN CHECKING	04	
DZ	DA				03/2014	01	
EH	EM				06/02/2016	01 +	
EK	ER				MAIN OFFICE 01.16.09	01 +	
EL	EL				TELLER / INVESTMENTS	01	
EP	EM				05/2014	01 +	
EV	BR			Y	07/01/2013	01 +	
EY	EM			Y	08/2015	01 +	
E1	EA		TL	Y	EAGLE CU OPENED 2/6/09	12 +	
E2	EA		TL	Y	EAGLE CU OPENED 2/6/09	12 +	
FC	FA		TL	Y	09/03/2013	01 +	
FF	FR		TL			01	
FH	FL		TL	Y	MAIN OFFICE TELLER	01 +	
FM	FA		CL		11/1/11 COLLECTOR ID	01	

Employee Profile

Special Security

Copy

Assign Tools to this Employee

Delete

View Profile

Account Security

All Tool Assignments

Add Employee

CU Options

Data Center Employees

View Maintenance

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TR (6184) 1/09/17

...and it comes to the top of the list

Improvements for security officers and auditors

- More data about your employees

Coming in March!

Session 0 CU*BASE GOLD -
File Edit Tools Help

Employee Security Maintenance

Jump to ID **DM** Search for name containing Show only job classification

ID	Name	Job Class	Team	Teller	Comments	Primary Vault	Start Date
DM	DAWN TESTING	TELLER	TL	Y	testing a cu user	01	Jan 06, 2017
DO						01	
DP			TL	Y	NEW HIRE 11/17/08	03 +	

Session 0 CU*BASE GOLD - Employee Profile

Employee ID **DM** Password

Name **DAWN TESTING**

Vault # **1** Other authorized vaults

Team **TL** ☒ Teller posting Job classification **TELLER**

Comments **testing a user**

Branches

Corp IDs

Start date **Jan 06, 2017** [MMDDYYYY] NMLSR #

Email address **dmoore@cuanswers.com**

All Tool Assignments

- Add Employee
- CU Options
- Data Center Employees
- View Maintenance

TR (6180) 1/09/17

Start date

Email address for use with new CU*BASE tools

NMLSR # for custom loan form programming

Improvements for security officers and auditors

- More data about your employees

Coming in March!

Session 0 CU*BASE GOLD -

File Edit Tools Help

Employee Security Maintenance

Jump to ID

DM

Search for name containing

Show only job classification

ID	Name	Job Class	Team	Teller	Comments	Primary Vault	Start Date
DM	DAWN TESTING	TELLER	TL	Y	testing a cu user	01	Jan 06, 2017
DO						01	
DP			TL	Y	NEW HIRE 11/17/08	03 +	

Session 0 CU*BASE GOLD - Employee Profile

Employee ID

DM

Password

UPDATE

Name

DAWN TESTING

Vault #

1

Other authorized vaults

Select

Team

TL

☒ Teller posting

Job classification

TELLER

Comments

testing a user

Branches

Select

Corp IDs

Select

Start date

Jan 06, 2017

[MMDDYYYY]

NMLSR #

Email address

dmoore@cuanswers.com

All Tool Assignments

Add Employee

CU Options

Data Center Employees

View Maintenance

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New Job Classification code (you must assign these)

This controls what a user sees when they click the

Recommended Tools

button on their home page

Improvements for security officers and auditors

- More data about your employees

Coming in March!

Session 0 CU*BASE GOLD -
File Edit Tools Help

Employee Security Maintenance

Jump to ID DM

Search for name containing

Show only job classification

ID	Name	Job Class	Team	Teller	Comments	Primary Vault	Start Date
DM	DAWN TESTING	TELLER	TL	Y	testing a cu user	01	Jan 06, 2017
DO	DO					01	
DP	DP		TL	Y	NEW HIRE 11/17/08	03 +	
DT	DT						
DV	DV						
DW	DW						
DZ	DZ						
EH	EH						
EK	EK						
EL	EL						
EP	EP						
EV	EV						
EY	EY						
E1	E1						
E2	E2						
FC	FC						
FF	FF						
FH	FH						
FM	FM						

Session 0 CU*BASE GOLD - Select Job Class Code - One Only

Select Job Class Code - One Only

Job Class	Description
ACCOUNTING	Accounting
ASSTMGR	Assistant Branch Manager
BRANCHMGR	Branch Manager
CALLCENTER	Call Center
COLLECT	Collections
HEADTELLER	Head Teller
HR	Human Resources
IT	Information Technology
LENDER	Consumer Loan Officer
MARKETING	Marketing

Employ

Special

Select

← → ↑ || ⏏ 🔗 i ? @

TR (6183)

All Tool Assignments

Add Employee

CU Options

Data Center Employees

View Maintenance

← → ↑ || ⏏ 🔗 i ? @

TR (6184) 1/09/17

Job Class codes let us give security officers our recommendations for tool assignments

Improvements for security and audit

- More data for employee

Session 0 CU*BASE GOLD -

File Edit Tools Help

CU*BASE Recommended Tools

Welcome, DAWN MOORE!

What would you like to do today? Tool # Shortcut

Search for

☐ Exact match ☐ Search long description

Tool #	Tool Description	
Go! 3	Open/Maintain Membership	i ★
Go! 4	View My Cross Sales Sta	i ★
Go! 5	Work with Member P	i ★
Go! 10	Member Starter/Re	i ★
Go! 14	Member Personal Ba	i ★
Go! 21	Print Misc Member A	i ★
Go! 31	Reverse Tran/Adjust Drawer	i ★
Go! 33	Teller Drawer Control/Inquiry	TLRCTL i ★
Go! 40	Change Employee ID Password	PW i ★
Go! 71	Stop Payment on Member Check/Draft	STOP i ★
Go! 112	ACH Member Inquiry	i ★
Go! 156	ATM/Debit Cards & Activity Inquiry	CARDINQ i ★

Auto-security is ON for employee ID ;D

TR (6139) 1/12/17

My Favorite Tools

All My Tools

Recommended Tools

All Available Tools

Filter by Ty

Filter by Ca

Refresh

Total # of tool

New navigation how-to video >

Navigating the home page

See what's new >

Work My Follow-Ups

CU*BASE gold edition

TR (6184) 1/09/17

After you've assign a job class, the employee will be able to click this button to see which tools we recommended for them

Coming in Search!

Improvements for security officers and auditors

- A whole new way to assign tools to your employees

Coming in March!

Session 0 CU*BASE GOLD -
File Edit Tools Help

Employee Security Maintenance

Jump to ID Search for name containing Show only job classification

ID	Name	Job Class	Team	Teller	Comments	Primary Vault	Start Date
DM	DAWN TESTING	HEADTELLER	TL	Y	testing a user	01	Jan 06, 2017
DO	DO					01	
DP	DA		TL	Y	NEW HIRE 11/17/08	03 +	
DT	DE					01	
DV	RU		LN		FOR RD LOANS KEPT ON THE BOOKS	01	
DW	DE		LC		LOAN CHECKING	04	
DZ	DA		IT		03/2014	01	
EH	EM		TL	Y	06/02/2016	01 +	
EK	ER		TL	Y	MAIN OFFICE 01.16.09	01 +	
EL	EL		IV		TELLER / INVESTMENTS	01	
EP	EM		TL	Y	05/2014	01 +	
EV	BR		TL	Y	07/01/2013	01 +	
EY	EM		TL	Y	08/2015	01 +	
E1	EA		TL	Y	EAGLE CH OPENED 8/16/09	12 +	
E2	EA					12 +	
FC	FA					01 +	
FF	FR					01	
FH	FL					01 +	
FM	FA					01	

Employee Profile

Special Security

Conv

Assign Tools to this Employee

Delete

All Tool Assignments

Add Employee

CU Options

Data Center Employees

View Maintenance

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TR (6184) 1/09/17

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

Set up what *this* employee can do...

Assigning tools to your employees

- A whole new way to assign tools to your employees

All tools in one place

Search for a single tool or show similar tools

Coming in March!

Session 0 CU*BASE GOLD - POP1 POP2 File Edit Tools Help

Assign Tools to Employees

All Available Tools

For all employees ☒ # employees 239

Search for ☐ Exact ☐ Description Tool #

Categories Types

A highlighted row indicates a custom program

Tool Description	View Only	Categories	# Employees
Abnormal Activity Monitoring Config		CONFIGS	7
Account Balance Analysis Report		REPORTS, MARKETING	40
Account Retention by Age Group		KNOWMBR, ANALYSIS	4
Account Retention by Year Opened		KNOWMBR, ANALYSIS	4
Account Suffix Configuration		CONFIGS	5
Accounts Payable Vendor I	Y	AP, REVIEW	7
Accrue Interest for 360		PART	5
Accrued Dividend Summa		REPORTS	9
ACH Extract/Post		ACH	5
ACH Fed Transmission Sum		ACH, CANNEDQRY	17
ACH Member Inquiry		ACH, MBRINQ	147
ACH Posting Controls Config		CONFIGS	5
ADB Calculator (Savings & Loans)		ANALYSIS, BUDGETING	2
Add Manual ACH File to Warehouse		ACH	6
Add-on Additional Funds to Student Loan		STUDENTLNS	2
Add/Maintain Participation Loans	Y	PART	1
Adjust Teller Drawer/Audit Keys		ACCTADJ	7
Age Distribution Analysis Report		REPORTS, MARKETING	9
AIRES - Create Files		AIRES	7

Sort by any column

How many employees can use this tool?

Assigning tools to your employees

- More visibility of who can use your tools



Session 0 CU*BASE GOLD - POP1 POP2 File Edit Tools Help

Assign Tools to Employees

All Available Tools

For all employees # employees 239

Search for ☐ Exact ☐ Description Tool #

Categories Types

A highlighted row indicates a custom program

Tool Description	View Only	Categories	# Employees
Abnormal Activity Monitoring Config		CONFIGS	7
Account Balance Analysis Report		REPORTS, MARKETING	40
Account Retention by Age Group		KNOWMBR, ANALYSIS	4
Account Retention by Year Opened		KNOWMBR, ANALYSIS	4
Account Suffix Configuration		CONFIGS	5
Accounts Payable Vendor Inquiry	Y	AP, REVIEW	7
Accrue Interest for 360 Partic. Loans		PART	5
Accrued Dividend Summary Rpt - CDs		REPORTS	9
ACH Extract/Post		ACH	5
ACH Fed Transmission Summary Inq (ACHSM)		ACH, CANNEDQRY	17
ACH Member Inquiry		ACH, MBRINQ	147
ACH Posting Controls Config		CONFIGS	5
ADB Calculator (Savings & Loans)		ANALYSIS, BUDGETING	2
Add Manual ACH File to Warehouse		ACH	6
Add-on Additional Funds to Student Loan		STUDENTLNS	12
Add/Maintain Participation Loans	Y	PART	1
Adjust Teller Drawer/Audit Keys		ACCTADJ	37
Age Distribution Analysis Report		REPORTS, MARKETING	39
AIRES - Create Files		AIRES	7

Which employees can use this tool?

Show Assigned

Print

Navigation icons: back, forward, up, down, home, search, help, etc.

Assigning tools to your employees

- More visibility of who can use your tools



Session 0 CU*BASE GOLD - POP1 POP2 File Edit Tools Help

Assign Tools to Employees

All Available Tools

For all employees # employees 239

Search for ☐ Exact ☐ Description Tool #

Categories Types

A highlighted row indicates a custom program

Tool Description	View Only	Categories	# Employees
Abnormal Activity Monitoring Config		CONFIGS	7
Account Balance Analysis Report		REPORTS MARKETING	48
Account			
Account			
Account			
Account			
Accrue			
Accrue			
ACH Ex			
ACH Fe			
ACH Me			
ACH Po			
ADB Ca			
Add Ma			
Add-on			
Add/Ma			
Adjust			
Age Di			
AIRES			

Session 0 CU*BASE GOLD - Employees Assigned to Tool

Accrue Interest for 360 Partic. Loans

ID	Name
AD	AUT
AG	ANY
AL	ASH
AR	ANY
92	CU*

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TR (6159)

can use this tool?

Show Assigned

Print

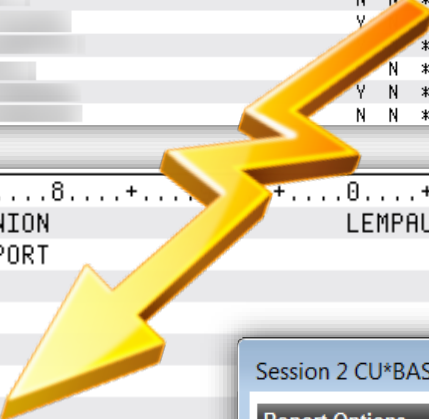
← → ↑ || ⏏ 🔗 ⓘ ? @

TR (6166) 1/09/17

New Reports for Auditing your Security Settings

BEYOND THE DASHBOARD

*...+...1...+...2...+...3...+...4...+...5...+...6...+...7...+...8...+...9...+...0...+...1...+...2...+...3																																						
10/27/16 14:09:28										CREDIT UNION										LEMPAU10																		
RUN ON 10/27/16										EMPLOYEE SECURITY AUDIT REPORT										PAGE																		
										AS OF 10/27/16										USER DAWNM																		
*** MENU SECURITY - MNGELE General Ledger																																						
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	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										*	N	N	N	N	N	N	N	N		N	N	N	*	*	N	N	N	N	N	N	N	*		*	*	*	*
AF	AMY										N	*	N	N	N	N	N	N	N	Y	N	N	N	*	*	N	N	N	N	N	N	N	*		*	*	*	*
AG	AMA									Y	N	*	N	N	N	N	N	N	N		N	N	N	*	*	N	N	N	N	N	N	N	*		*	*	*	*
AH	AN										N	N	*	N	N	N	N	N	N		N	N	N	*	*	N	N	N	N	N	N	N	*		*	*	*	*



*...+...1...+...2...+...3...+...4...+...5...+...6...+...7...+...8...+...9...+...0...+...1...+...2...+...3																															
12/05/16 17:12:06										RELEASE CONTROL CREDIT UNION										LEMPAU01											
Run On 12/05/16										ASSIGNED TOOLS AUDIT REPORT										PAGE											
Category: GL										General Ledger Inquiry & Posting Tools										USER DAWNM											
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																													

Session 2 CU*BASE GOLD Edition - Security Audit Reports

Report Options	Response
Security audit report	Assigned tools audit re Assigned tools audit re Employee security audit Employee security maint

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Session 2 CU*BASE GOLD Edition - Security Audit Reports

Report Options	Response
Security audit report	<div>Assigned tools audit report</div> <div>Assigned tools audit report</div> <div>Employee security audit report</div> <div>Employee security maintenance report</div>

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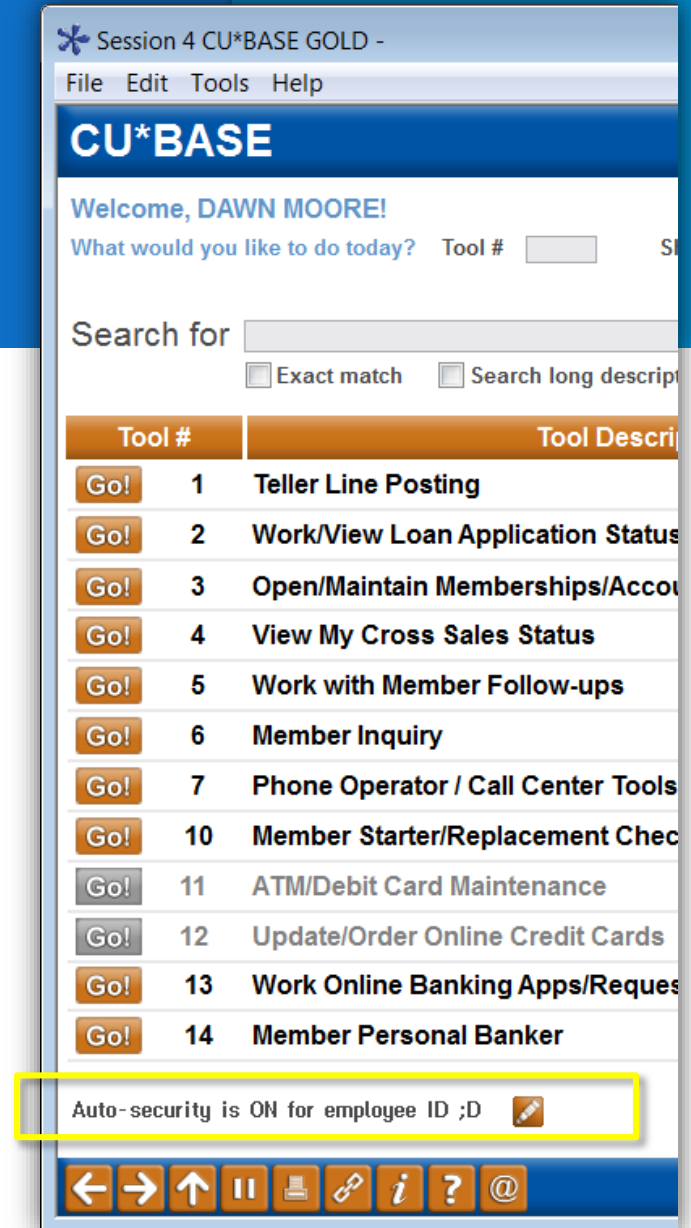
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☒ J Copi Print

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

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

*...+....1....+....2....+....3....+....4....+....5....+....6....+....7...			
1/04/17	9:56:27	UPDATE	CREDIT
Run On	1/04/17	EMPLOYEE SECURITY CONVER	
OLD Menu: MNACCK	Option#: 01	Program: UAPOPCL	OLD Desc: Wor
Assigned to: Employee ID	Name	NEW Desc: Wor	
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: Sel
Assigned to: Employee ID	Name	NEW Desc: Sel	
JF	JEF		
MA	BRA		
05	DON		
16	GRE		
19	KAR		

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

The screenshot displays the CU*ANSWERS website. At the top is a navigation bar with the CU*ANSWERS logo and links for Products, Solutions, Resources, Events, and About. The main header features the title 'In the Kitchen: Revamping the CU*BASE Menu System'. Below this is a large image of a kitchen with the text 'What's cooking in the kitchen?'. A text box on the left states: 'some of the large topic projects that are currently in varying phases of development.' Below the kitchen image is a section titled 'What's cooking?' with a sub-header 'In the Kitchen' and the main title 'Revamping the CU*BASE Menu System'. A 'Read More' link is visible. Below this is a 'Latest News' section with a date of 1/5/2017, announcing a new release date for the 17.03 release, scheduled for March 19, 2017. It includes a 'Release Planning' link and a list of links to watch videos about the new navigation, tools, button bars, and toolset controls. On the right side of the page is a 'In This Section' sidebar with a list of links: In the Kitchen, Name Truncation for Credit/Debit Ca, M-Up, Revamping the CU*BASE Menu System (highlighted), Bill Payment Integrations: A New Fu, Phone Number Database Expansion, TotalLook, and API Development Update and Appr.