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Documentation: Tricks of the Trade

TIP #1: Which Menu Option Should I Use?

With over twenty different menus and countless menu options, it can be daunting to know where to go to get started in CU*BASE.


With that in mind, we have developed the CU*BASE Search to assist you. CU*BASE Search will search both the words in the Option *as well as a descriptive text of what you can do with this option* to find a match.

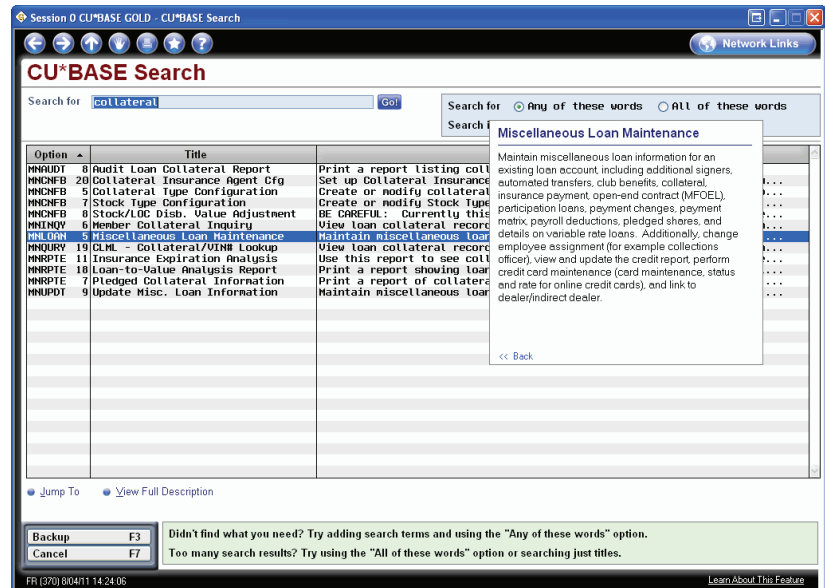
Access the CU*BASE Search by entering the word in the Search field in the lower right corner of any Menu screen.

Not sure where to maintain collateral? Enter “collateral” in the Search field and press Enter to see that #5 Miscellaneous Loan Maintenance on the Lending menu is just where you need to start. Then use “View Description” to view a large pop up window describing what else you can do with this option. Or use “Jump to” to move directly to the entry screen of the option, just as if you accessed it directly from the Lending menu.

Also click the dots or stars in front of an option to a Menu screen to reveal the same pop-up screen you see in the GOLD Search

Workstation Functions

- 8  Change Employee Password
- 9  Change User ID Password
- 10  Activate Auto Security
- 11  Deactivate Auto Security



*Use the CU*BASE Search to find just the Option you need to get started.*

TIP #2: Find a Wealth of Documentation by GOLD Screen

Finding documentation on a screen in Online Help is easy. Simply click on “Learn about this Feature” in the lower right hand corner of any screen to access the CU*BASE Online Help.

Or use the question mark icon at the top of the screen. Then select “Help for this Topic.”

[Learn About This Feature](#)



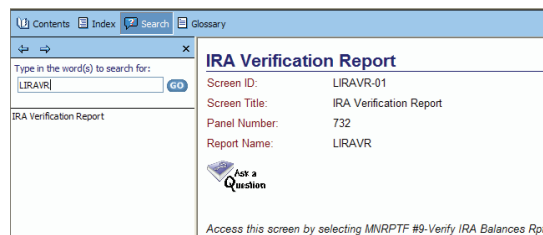
TIP #3: Find Step-by-Step Instructions on Frequently-Done Tasks

Find step-by-step directions on frequently-done tasks in the Show Me the Steps Online Help. Access this help system by first clicking on the question mark button at the top of any menu screen. Then select “Show Me the Steps Online Help.”

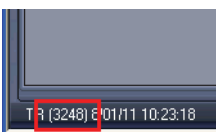


TIP #4: Find How to Print a Report—Even When You Only Have the Printed Report

You have a printed CU*BASE report, but have no idea which option was used to create it. Find out how to print it using the CU*BASE Online Help. Enter the short report name (for example LIRAVR) in the Index and click the GO button. The top of the topic lists how to print the report. The topic even includes a sample of the report.



TIP #5: Find More About a GOLD Screen – Even When All You Have is a Print Out of the Screen



Each GOLD screen has a number in the lower left corner. Enter this number in Search field of the CU*BASE Online Help and click the GO button. Select from the “hits” on the left column to see the help topic for that screen.

TIP #6: Use GOLD Online Help Table of Contents, Index, and Search Features to Find Just the Information You Need

The Table of Contents of the GOLD Online Help is organized by menu. Many GOLD screen titles, as well as other key words are entries in the Index. The Search feature searches the entire topic for the word you enter in this field. Use these tools to narrow your results.

TIP #7—#999: Check Out the CU*BASE Reference Page for More Documentation

The CU*BASE Reference Page is your go-to location for all documentation about CU*BASE. Access this page via “I am a Client,” then “Docs & Information,” then “CU*BASE Reference.

At the top of the page are links to:

- “Special Interest Publications” — Documentation written on many specialized products.
- “Our Favorite Reports” — Overview and tips for frequently-used CU*BASE Reports written by our experts. Also included is booklet with examples of all CU*SPY Daily Reports.
- “Exercises for Success” — Practice exercises for use with Bedrock Credit Union.

Following are over 150 booklets and brochures on specific CU*BASE Features.



6000 28th Street, SE
Grand Rapids, Michigan 49546
<http://www.cuanswers.com> 616-285-5711