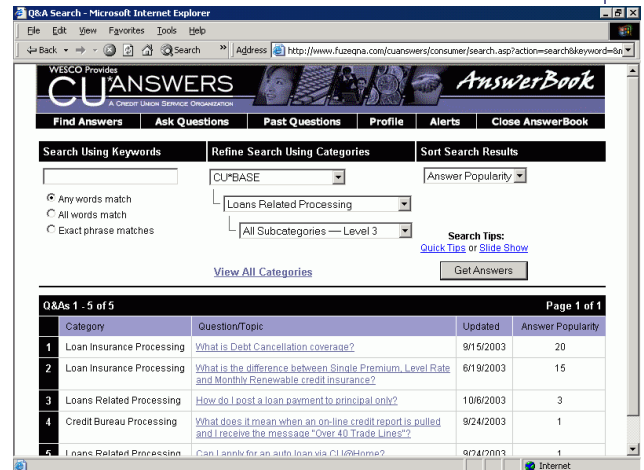


# Answer Book

October 2003

You've seen how the introduction of online help for CU\*BASE GOLD has made your staff more productive and shortened the learning curve for new employees. Now we are pleased to present another tool with those same goals in mind. The CU\*Answers **Answer Book** is designed to help you get quick answers to your questions, anytime, anywhere via the web.

This comprehensive Q&A database, or "knowledge base," is part of our effort to make sure that every credit union employee has direct access to the information they need to serve your members. Not only can you scan multiple categories for the most commonly-asked and answered questions, you can also submit your own questions to be answered by a CU\*Answers expert.

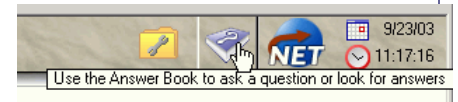


The Answer Book already contains over a hundred of your most commonly-asked questions, and the knowledge in this database will grow and change on a daily basis. Client Service Reps also enter all of your questions into the Answer Book as they work with you over the phone.

## Opening the Answer Book

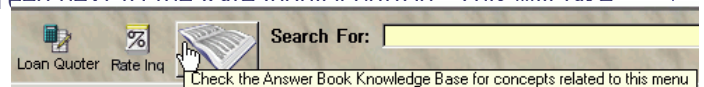
The next time you have a question, before you pick up the phone, take a look at the Answer Book first:

- ◆ In CU\*BASE GOLD, click the new Answer Book icon located just to the left of the NET button in the upper right corner of any CU\*BASE screen.



OR

- ◆ If you are working on a CU\*BASE menu, you will also see a new Answer Book button at the bottom of the screen next to the Data Inquiry button. This will take you to a category in the Answer Book related to the menu you are working on.



OR

- ◆ From several different areas of our web site at [www.cuanswers.com](http://www.cuanswers.com).

(Continued)

OPENING THE ANSWER BOOK

FINDING ANSWERS

ASKING QUESTIONS

REVIEWING YOUR PAST QUESTIONS

GETTING ALERTS

TRACKING HELP DESK ACTIVITY

## Find Answers

## Finding Answers

After opening the Answer Book, use the Search features to locate an existing answer fast.

The screenshot shows the search interface with three main sections: **Search Using Keywords**, **Refine Search Using Categories**, and **Sort Search Results**. Callouts provide instructions: 'Click [View All Categories](#) to see a list of all of the areas where answers have been grouped.' points to the 'View All Categories' link; 'Click [Quick Tips](#) or [Slide Show](#) to learn how to use all of the search features.' points to the 'Search Tips' link; and 'After entering keywords and/or choosing categories, click **Get Answers** to perform the search.' points to the 'Get Answers' button.

- ◆ **Search Using Keywords**—In this section you can search for specific key words or phrases to locate similar answers.

*For example, if you entered the text **Tiered Service** and chose **All words match**, the Answer Book would display all questions where the words **Tiered** and **Service** both appeared in either the question or the answer.*

- ◆ **Refine Search Using Categories**—whether or not you use keywords, the category section lets you look at all questions that relate to a similar topic. There are three levels: in the first drop-down list, choose a main category, then use the other two lists to select from various sub-categories. This is a great way just to scan the knowledge base for an area of interest.

*For example, if you left the keyword blank, then chose **CU\*BASE** as the main category and **Loan Related Processing** as the level 2 sub-category, the Answer Book would display any existing items related to loan processing in CU\*BASE.*

- ◆ **Sort Search Results**—You can even sort the results by answer popularity, newness, user rating, or category. The “answer popularity” sort is good for checking out what your colleagues have been asking. The “newness” sort is particularly helpful for keeping up with the latest information added to the knowledge base, since the Answer Book will be changing every day!

## Ask Questions

## Asking Questions

If you can't find your answer among the existing Knowledge Base items, you can submit a question of your own via the Answer Book.

You will be required to fill in some basic contact information so that we can get back to you with an answer and track your other questions in the future. The most important piece of information that we need is a unique email address. **If you have your own email address, just enter that.**

However, if you do not have access to your own email, do not enter someone else's email address (such as a shared email your credit union uses for all incoming email). Instead, create a "pretend" email that is unique to you, using this format:

**nameX@123.tmp**

Substitute your first name, last name initial, and credit union number. For example, if your name is John Smith at credit union #200, your pretend email would be:

**johns@200.tmp**

After you enter the question and click Submit, your question will be routed to the proper "expert" here at CU\*Answers, and you will receive a direct answer via email or phone (you can also ask just for a phone call if you like). The question will then be added to the database so that others can benefit from that same knowledge.

Remember that registration is only needed for viewing past questions. You do not need to register in order to search the knowledge base for answers or to ask a question!

### Past Questions

## Reviewing Your Past Questions

Every question you ask is saved and tracked according to the email address you entered when you submitted the question in the Answer Book. That's why it is important to enter a unique email address when you submit your first question, and use that same address for all future questions.

### Registering and Logging In

If you want to review a list of your past questions, you will need to be registered so that you can log in using that email address and a password. (Registration is only needed for viewing past questions; you do NOT need to register in order to find answers or ask a question!)

If you have not registered before, a link is available that you can use to register on line. You will need to fill out your email address, define a password, and enter your name and credit union name. You'll also be asked to provide a response to a "Password Security question" that will be used if you forget your password and need a reminder later.

[New User? Click to Register.](#)

### Looking at Past Questions

Once you have registered, any time you want you can click the "Past Questions" button, log in, and look at list of questions you have asked in the past.

If the status reads "Closed," you should already have received a response to your inquiry, either via email or phone, and no further action needs to be taken.

### Changing and Resubmitting a Question

Click the View Details button to read more about any item. Use the fields provided to change the text of the question if you want to clarify it further, then resubmit it for additional help. The status will be changed to "Open" and you will be contacted with additional information.

The screenshot shows a web browser window displaying the CU\*Answers website. The page title is "WESCO Provides CU\*ANSWERS A CREDIT UNION SERVICE ORGANIZATION AnswerBook". The navigation menu includes "Find Answers", "Ask Questions", "Past Questions", "Profile", "Alerts", and "Close AnswerBook". Below the menu, there is a search bar for "Search All Company Related Past Questions" with fields for "Email" (angie@500.tmp) and "Name" (Angie Douglas). A table titled "Number of Questions : 395" displays a list of questions with columns for "Date Submitted", "Inquiry#", "Question and Answer", and "Status".

	Date Submitted	Inquiry#	Question and Answer	Status
1	10/6/2003	194224	Q: How should the new Miscellaneous Advances work in relation to the teller drawer.	Closed View Details
2	10/6/2003	194212	Q: Posting transaction - received an error message and teller now has a right to left error. A: Verified right to left error updated teller P4 drawer totals. Checks total of \$205,121.20.	Closed View Details
3	10/6/2003	194135	Q: Verify that the Branch issue for the outside check sweep is resolved. A: They are all set.	Closed View Details
4	10/2/2003	194098	Q: ...	Closed

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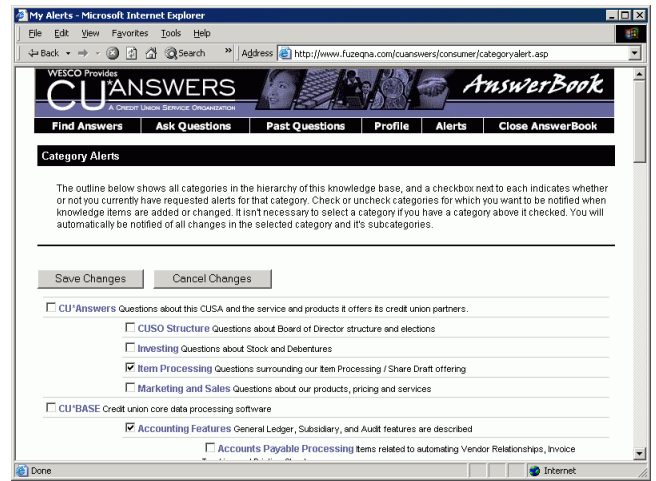
**Alerts**

## Getting Alerts

One of the most exciting features available in the Answer Book is the ability to request an email alert whenever something of interest to you changes in the knowledge base. For example, if you are the lending manager, you might want to be notified any time a new item is posted or a change is made in the Loan-Related Processing category.

You'll just need to be registered using a valid email address to which the alerts can be sent. Click the Alerts button (you will need to log in) then click Modify Category Alerts. Place a checkmark on any category or sub-category that is of interest to you, then click Save Changes.

If changes are made to any items within your selected categories, a single email will be sent listing all of the items that were changed that day. The next time you access the Alerts page you will see any updated items for your review.

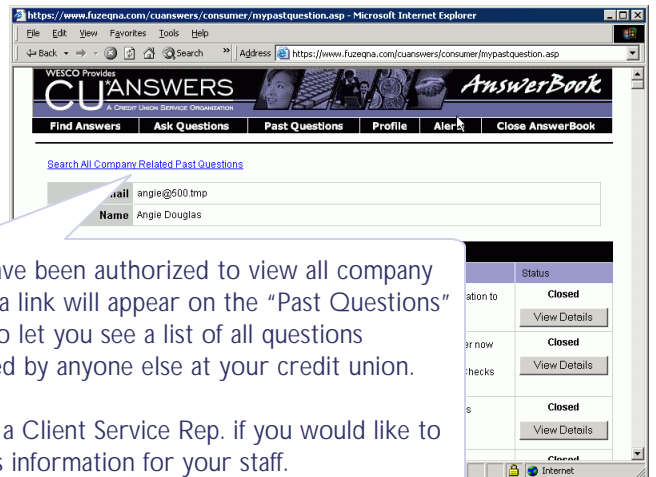


**Past Questions**

## Tracking Credit Union Help Desk Activity

The Answer Book is even more than just a great Q&A tool. Because we can track who asks each question, we can also keep track of all of the inquiries entered by everyone at your credit union. This can be a very valuable tool for credit union managers, supervisors and training coordinators, to help pinpoint areas where your staff may need additional support or education.

Because the Answer Book is via the web, call activity is available for both online and self processing credit unions. Credit union leaders can get a complete picture of all of the contacts between your staff and CU\*Answers Client Services. Questions that are submitted via the Answer Book will be included, as well as all phone contacts added by our Client Service staff as they work with you over the phone.



If you have been authorized to view all company activity, a link will appear on the "Past Questions" screen to let you see a list of all questions submitted by anyone else at your credit union.

Contact a Client Service Rep. if you would like to view this information for your staff.

The Answer Book "Past Questions" feature will replace the existing Help Desk Tracking feature that was formerly available from MNMAST Option #6. (That command will now be used only to display your client profile information.)

Because this will replace the help desk software previously available through CU\*BASE, your credit union's call list from the old database will be imported into the Answer Book list, starting with data from January 1, 2003. (Keep in mind that questions asked prior to October 27, 2003, will look different and will not contain as much detail, since they were entered on the old system.)