CU*BASE® Leadership Dashboards

Tools that provide a window on your credit union's day-to-day operations...
Tools that every credit union leader should be familiar with

CU*BASE dashboards let you keep a close eye on every area of your credit union's operations, and they do it with robust graphical tools that help to clarify your message and give it punch.

CU*BASE export features allow you to get the most from your data! Use the ⬛PDF tool to generate a high-quality PDF summary of the dashboard contents, ready to present to your Board or other team members. *(Special PDF export software is required; contact a CSR for information about purchasing this inexpensive software for your CEO's workstation.)*

Use the ⬛ tool to export the dashboard contents for use with a spreadsheet application. Use ⬛ for a .csv (comma-separated value) export.

Management Analysis Dashboards 1 Menu (MNMGMD)

10-Year Trends by GL Account (Also accessed via the Budgeting Tools menu.)	Get a big-picture view of how your G/L balances have been trending over a 10-year period. Learn more.
3-Year GL Acct Balance Comparison (Also accessed via the Budgeting Tools menu.)	Analyze the history of a single G/L account performance over time or for a group of similar accounts. Learn more.
5300 Call Report Ratios PDF ⬛ ⬛ (Exports on second screen.)	Analyze 5300 Call Report ratios for the period entered. Learn more.
ADB Analysis (Savings & Loans) PDF ⬛ ⬛	Calculate the average daily balance for your Member Trial Balance G/L accounts. Learn more.
All Accounts Analysis PDF ⬛ ⬛ (Exports available on all of the Analysis screens.)	Analyze your account data in over 35 ways and the members who own them. Learn more.
All Memberships Analysis PDF ⬛ ⬛ (Exports available on all of the Analysis screens.)	Analyze your memberships in over 50 different ways to use as a springboard to evaluate credit union policy. Learn more.
ARU/Online Banking Stats Dashbrd PDF ⬛ ⬛ (Exports available on all screens.)	View statistical information about your members' online and audio banking usage, including mobile web and mobile text usage. Learn more.
ATM Network/Terminal Activity PDF ⬛ ⬛ (Exports available on the Network dashboard.)	View the activity of your ATM terminals and networks to determine usage. Learn more.
Check Processing Statistics PDF ⬛ ⬛	Analyze all transmission batches of checks/drafts which have been posted to member accounts. Learn more.
Collections Dashboard/Summary PDF ⬛ ⬛ (Also accessed via the Collections Functions menu.)	Review a complete collections dashboard that displays your delinquency pipeline. Learn more.
Common Bonds for Any Mbr Group	Use the files generated from dashboards and analyze them based on what they have in common. Learn more.
Contingent Liability Analysis PDF ⬛ ⬛	Use this trending tool to expand opportunities and track loan-disbursement progress. Learn more.
Credit Card Portfolio Analysis PDF ⬛ ⬛ (Currently found on the Management Processing/Active Beta Tests menu.)	Analyze your credit card plastics portfolio by loan category, BIN, rates, transactions, and balances. Any loan with process type "V" can be included in this analysis. Learn more.
Credit Report Data Mining	Analyze your members' credit score data (by all credit scores and most recent score). Learn more.

Management Analysis Dashboards 1 Menu (MNMGMD) (continued)

Credit Score History Analysis PDF 🗎 💾 (Exports available on the Analysis screen. Currently found on the Management Processing/Active Beta Tests menu.)	Use this to create a segment of members to contact based on credit score history and to analyze all members to see what percentage of scores are improving, worsening, and more. Learn more.
Cross Sales Analysis Dashboard PDF 🗎 💾	Use this dashboard to monitor Cross Sales and follow ups by employee, branch, group, or type, as well as track incentives. Learn more.
EFT Portfolio Dashboard PDF 🗎 💾 (Exports are also available on the EFT Transaction Analysis and Unused Cards Analysis, accessed from the entry screen.)	Analyze your credit card data for active and inactive credit cards. Then drill down further to see trends for selected members. Learn more.
Fee Income/Waiver Analysis PDF 🗎 💾 (Currently found on the Management Processing/Active Beta Tests menu.)	Analyze your month-to-month member service fee income and frequency of your opportunities to earn. Learn more.
Fee Refunds History by Employee (Currently found on the Management Processing/Active Beta Tests menu.)	Review and evaluate which employees are waiving the most fees and for whom they're performing the waivers. Learn more.
Fee Waivers History by Employee (Currently found on the Management Processing/Active Beta Tests menu.)	Review and evaluate which employees are refunding the most fees and for whom they're performing the refunds. Learn more.
Financial Statement Review	This feature is ideal for employees who simply need to view the results of financial statements already run. Learn more.
Journal History Inquiry	View debits and credits for the selected G/Ls (already posted or not posted) beginning with the date entered. Learn more.
Loan Portfolio Concentration Risk PDF 🗎 💾 (Exports on the Listing, Summary, Product, Membership, and Collateral analysis screens.)	Analyze risk across your entire loan portfolio – Do you have the right number of eggs, in the right baskets? Learn more.
Loan Write-off/Charge-off History	Analyze data collected when a loan is written off or charged off. Learn more.
Loan App Monthly Stats Comparison PDF 🗎 💾 (Also accessed via "Loan App Statistics" on Loan Products menu.)	View how many and what type of loan applications you processed through the year or during a specific time period. Learn more.
Loan Concentration Risk by Member (Export button available.)	Find your top borrowers and analyze concentration risk one member at a time. Learn more.

Management Analysis Dashboards Menu 2 (MNMGME)

Loan Queue Activity Tracking PDF 🗎 💾 (Also accessed via "Loan App Activity Tracking" on Loan Products menu.)	Get a team-wide awareness of your lending goals and how fast you are moving toward them. Learn more.
Loan Payments Analysis PDF 🗎 💾 (Currently found on the Management Processing/Active Beta Tests menu.)	Compare payments received versus those anticipated to analyze how loan payments are flowing through the system. Learn more.
Loan Risk Score Analysis PDF 🗎 💾	Compare the performance of your risk-based pricing with your loan performance. Learn more.

Management Analysis Dashboards Menu 2 (MNMGME) (continued)

Loan/Share Trial Balance Review 📄🗎💾	Analyze the Member Trial Balance for key components including product applications and loan-to-share ratios. Learn more.
Look-to-Book Analysis	Analyze the amount of time it takes for a loan application to be processed. Learn more.
Losing the Love/Member Patterns	Analyze your closed members to find patterns to alert you that current members may be leaving. Learn more.
Membership Summary Comparison 📄🗎💾	Graphically compare membership data for two months. Learn more.
Net Relationship Dashboard (Currently found on the Management Processing/Active Beta Tests menu.)	Analyze your entire membership (or a segment of it) to see how many net savers and net borrowers there are. Learn more.
Network Password Reset Activity (Currently found on the Management Processing/Active Beta Tests menu.)	View key analytics online banking including enrollment, active online banking users, and password history change data. Learn more.
NSF/ANR Management Summary 📄🗎💾 (Use "NSF Statistics Dashboard")	View a full picture of the NSF and Courtesy Pay income credit union wide for an entire year. Learn more.
Package Loans to be Sold	Use this when you sell a portion of your loan portfolio or to segment a portion of your loan portfolio for concentration risk analysis. Learn more.
Patronage Comparison 📄🗎💾 (Exports are on the second screen. Currently found on the Management Processing/Active Beta Tests menu.)	Use this to compare two segments of your membership to see how they measure up to each other with respect to their activity and patronage. Learn more.
Portfolio Analysis – CDs (Also accessed via the Budgeting Tools menu.)	View a snapshot of your entire certificate portfolio to get a picture of your rates across member certificates. Learn more.
Portfolio Analysis – Loans (Also accessed via the Budgeting Tools menu.)	View a snapshot of your entire loan portfolio to get a picture of your rates across all loans. Learn more.
Portfolio Analysis – Savings (Also accessed via the Budgeting Tools menu.)	View a quick a snapshot of your entire savings portfolio, including shares and IRAs, checking, and escrow savings. Learn more.
Rate Analysis Across the Network	Compare savings/checking, certificate, and loan rates side-by-side against the network and with the top five credit unions. Learn more.
Skip-Pay History Dashboard	Analyze your consumer skip-payment programs to determine their effectiveness. Learn more.
Targeted Tiered Score Analysis 📄🗎💾	View a side-by-side comparison of how a selected group of members score in Tiered Services versus your general membership. (Includes filters for your employees/insiders!) Learn more.
Tiered Service Monthly Comparison 📄🗎💾 (Also accessed on the Marketing Functions menu.)	View Tiered Service scores side-by-side from multiple months to track your program and how it is motivating members toward higher participation. Learn more.
Transaction Activity Summary Comparison 📄🗎💾	Use this to assist you in developing your transaction ranges for abnormal transaction activity. Learn more.

"Knowing Your Member" Analysis Tools Menu (MNMGMA)

Transaction Analysis Tools PDF 🗴 💾 *(Exports are on the four secondary screens.)*	Use this to view four dashboards: an analysis of transaction cost/weigh factors, a transaction reversal cross-reference, and two analyses by your Reg D transaction policy. <u>Learn more.</u>
Trial Balance G/L Verification *(Also accessed on the General Ledger menu.)*	Compare your credit union Member Trial Balance totals to the appropriate General Ledger accounts to see where the two are out of balance. <u>Learn more.</u>
Channel Activity by Member Age Group PDF 🗴 💾	Segment members by age group; then analyze up to five key areas where these members are interacting with your credit union delivery channels. <u>Learn more.</u>
Transaction by Delivery Channel PDF 🗴 💾 *(Use "Sample Trans by Delivery Channel," select a channel, and the "Summary Compare" button to view the exports.)*	Analyze transactions posted during a selected month to view the most significant origins or delivery channels. <u>Learn more.</u>
Transaction Activity by Branch PDF 🗴 💾	View a snapshot of transaction activity between your branches to see activity for specific transaction origins. <u>Learn more.</u>
Member Transaction Label Analysis PDF 🗴 💾 *(Use "Members Trans Label Analysis.")*	View an aggregate listing of all transaction labels for your entire membership to see how the majority of your members interact with the credit union. <u>Learn more.</u>
Where Your Members Borrow PDF 🗴 💾	Rank competitor financial institutions that are also doing business with your members and co-borrowers. <u>Learn more.</u>
Where Your Members Shop *(To export data select a merchant and then the "Export" option.)*	Analyze by transaction description and retailer name where your members spend their money. *(Includes payments via ACH, too)* <u>Learn more.</u>
Where Your Members Branch *(Also accessed via "Shared Branch Activity Analysis" on the Teller & Cash Analysis Tools menu.)*	View shared branching data on your members and on members of other credit unions. <u>Learn more.</u>
Relationship Analysis PDF 🗴 💾	View a breakdown of your member and non-member data by age and gender; also view the average age of members at your credit union. <u>Learn more.</u>
Sample Checking Account Activity	View transaction history for members who had checking account activity for the previous month and analyze this data in 13 different ways. <u>Learn more.</u>
Sample Transaction Activity by Delivery Channel PDF 🗴 💾 *(Use "Sample Trans by Delivery Channel," select a channel, then a member, and "Select" to view the exports.)*	Analyze members maximizing delivery channels to look for trends/demographics, improve member services, increase revenues, and lower expenses. <u>Learn more.</u>
Member Demographics PDF 🗴 💾 *(Use "Where Your Members Live.")*	Use this to compare member addresses to locations of credit union branches and ATMs. A fee is required for this service. <u>Learn more.</u>
Money Movement Analysis PDF 🗴 💾	Analyze the movement of money from any point in time to another, highlighting the members who need your attention. <u>Learn more.</u>

"Knowing Your Member" Analysis Tools Menu (MNMGMA) (continued)

Products & Services Per Member PDF ✖ 💾	View the average PPM and SPM figures from your Tiered Services scoring files to analyze what this means to your credit union. Learn more.
Membership Retention by Age Group PDF ✖ 💾	View the ages of your members when they joined the credit union, as well retention data of these members. Learn more.
Membership Retention by Year Opened PDF ✖ 💾	View retention data on memberships by the year the memberships were opened. Learn more.
Account Retention by Age Group PDF ✖ 💾	View the ages of your members when they opened accounts, as well retention data of these accounts. Learn more.
Account Retention by Year Opened PDF ✖ 💾	View account retention data by the year the account was opened. Learn more.

Teller & Cash Analysis Tools Menu (MNHTLA)

Teller Activity by Time of Day PDF ✖ 💾	View a quick visual of when the bulk of your teller activity occurs during a typical day. Learn more.
Teller Activity by Day of the Week PDF ✖ 💾	View teller activity by day of week to search for trends and make plans for scheduling. Learn more.
Teller Activity by Day of the Month PDF ✖ 💾	View transaction counts for each day within the month to see trends, avoid negative situations, and recreate positive ones. Learn more.
Teller Activity by Transaction Type PDF ✖ 💾	View a breakdown of activities processed by your tellers for a more well-rounded view of your lobby activity. Learn more.
Shared Branch Activity Analysis PDF ✖ 💾 (Also accessed via "Where Your Members Branch" on the "Knowing Your Member" Analysis Tools menu.)	View shared branching data on your members and on members of other credit unions. Learn more.
Cash Activity Analysis Inquiry PDF ✖ 💾	Verify the activity of cash flowing in and out of branches and the types of checks coming across your counters. Learn more.

Learn From a Peer Menu (MNMGMB)

Fee Comparisons (Several) PDF ✖ 💾 (The Check Printing Fee Comparison has exports.)	Compare your credit union fees side-by-side with those of other credit unions. Learn more.
Tiered Services Peer Analysis PDF ✖ 💾	Compare statistics of your credit union's Tiered Service Program side-by-side with statistics of other credit unions. Learn more.
Tiered Services Program Config PDF ✖ 💾 (Use the "Learn from a Peer" button to view the dashboard and the Exports.)	Compare your Tiered Service configuration, including levels and points given, side-by-side with configurations of other credit unions. Learn more.
CD Rate Analysis Dashboard PDF ✖ 💾	Compare your certificate rates side-by-side with those of other credit unions. Learn more.
Share Rate Analysis Dashboard PDF ✖ 💾	Compare your savings, IRA, checking, and escrow rates side-by-side with those of other credit unions. Learn more.
Loan Rate Analysis Dashboard PDF ✖ 💾	Compare your loan rates (credit card and non-credit card) side-by-side with those of other credit unions. Learn more.

Rate Analysis Across the Network [PDF] [XLS] [SAVE]	Analyze your savings, certificate, and loan rates and compare them against the top five credit unions in the network. Learn more.
Network Password Reset Activity	Analyze online banking users activity, including password history change data across the network. Learn more.
Peer Net Relationship Analysis	Compare net savers and net borrowers across the network. Learn more.

Lending Functions Menu (MNLOAN)

Credit Score History Dashboard [PDF] [XLS] [SAVE] (Accessed via Action Code "CH." Also accessed via "Credit Score History Dshbrd" on the Management Dashboards 1 menu. Exports are on the Analysis screen,.	View all credit scores pulled for your membership. Then analyze the scores for a selected Social Security number. Learn more.
Loan App Activity Tracking [PDF] [XLS] [SAVE] (Also accessed via "Loan Queue Activity Tracking" on the Management Dashboards 1 menu.)	Get a team-wide awareness of your lending goals and how fast you are moving toward them. Learn more.
Loan App Statistics [PDF] [XLS] [SAVE] (Also accessed via "Loan App Monthly Stats Comparisn" on the Management Dashboards 1 menu.)	View how many and what type of loan applications you processed through the year or during a selected time period. Learn more.

Marketing Functions Menu (MNMRKT)

Member Household Statistics [PDF] [XLS] [SAVE] (Access via "Work with Household database," enter a membership, select a member on the list, and use the "Member Stats" option. To view the exports drill down to the "Credit Union Analysis" detail.	View several dashboards that provide detailed statistics about a single household member. Access the exports on the analysis showing account balances, number of accounts, and average balance for that member. Learn more.
Combined Household Statistics [PDF] [XLS] [SAVE] (Access via "Work with Household database," enter a membership, and use "View Statistics for Combined Household" button. To view the exports drill down to the "Credit Union Product Analysis" detail.	View several dashboards that provide detailed statistics about the members of an entire household. Access the exports the analysis showing account balances, number of accounts, and average balance for that household. Learn more.
Membership Analysis Inquiry [PDF] [XLS] [SAVE] (Exports are on the second screen.)	View key statistics on your membership, from a breakdown on individual versus organization memberships to an analysis of membership ages. Learn more.
Tiered Service Monthly Comparison [PDF] [XLS] [SAVE] (Also accessed on the Management Dashboards 2 menu.)	View Tiered Service scores side-by-side from multiple months to track your program and how it is motivating members toward higher participation. Learn more.

General Ledger Menu (MNGELE)

Trial Balance G/L Verification (Also accessed on the Management Dashboards 2 menu.)	Compare your credit union Member Trial Balance totals to the appropriate General Ledger accounts to see where the two are out of balance. Learn more.
Vault G/L Verification	Compare the Change Fund G/L from the teller system to the general ledger for verification. Learn more.
Smart Operator: Daily Ops Log	View a record of electronic activity that is posted daily to your member accounts to verify this critical activity is being handled as expected every day. Learn more.

Reports E (MNRPTE)

247 Lender Performance PDF ☒ 💾

(Exports are on the second screen.)

Get a mile-high view of loans as they run through your loan factory and how the 247 Lender Decision Model is being used to approve or deny those loans. Learn more.

Back Office (MNBACK)

GOLD Release/Hardware Inquiry PDF ☒ 💾

(Exports are on entry screen and also on Hardware dashboard.)

View hardware and software statistics of your workstations including their operating system, processing speed, and available memory. Learn more.

Learn more about these and other CU*BASE tools:

http://www.cuanswers.com/resources/doc/cubase-reference/

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A Credit Union Service Organization