



Documentation: Tricks of the Trade

November Top Picks – Quick Reads and Year-End

Issue #24

Be sure to attend the upcoming Tricks of the Trade webinar on November 19 from 3:30-4:00 PM ET. Watch for an invitation via email. During the training, we will highlight several brochures that are “quick reads” to learn more about features in CU*BASE. We’ll also cover year-end materials.

Pick #1: [Where can I find a list of all the CU*BASE dashboards?](#)

CU*BASE allows you to not only analyze a specific area of your operations, but to do so with some of the most robust graphical tools on the market today. Check out this comprehensive list our trainers use when they explain our analytics dashboards to clients.

The four-page [CU*BASE Leadership Dashboards brochure](#) is grouped by CU*BASE menu and includes not only the option name, but a short description of the purpose of each dashboard.



Pick #2: [How do I get started with PDF Export?](#)

With a single click, the PDF Export feature lets you create data and charts in a format that’s ready to print and distribute to your board and management staff. This feature is explained in the introductory [PDF Export brochure](#), which also provides full-color examples of the charts and graphs you can create.

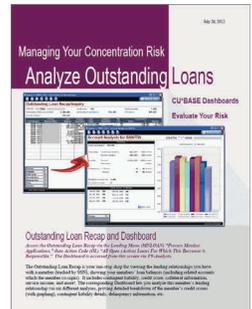
Also check out the [CU*BASE help topic](#) for more information on how this feature works and for details on the software licensing required. Use Search words “PDF Export.”



Pick #3: [I want to manage my concentration risk. How do I learn about the “Packaging Loans for Sale” feature?](#)

Packaging Loans for Sale is more than just a feature your credit unions can use when considering if you would like to participate or sell a portion of your loan portfolio. This feature also allows management to segment a portion of your loan portfolio for concentration risk analysis, including viewing servicing income and yield analysis.

Check out the [Packaging Loans for Sale brochure](#) for a quick overview of this feature.



Pick #4: [I want to manage my concentration risk. How do I analyze my outstanding loans on a dashboard?](#)

The Outstanding Loan Recap is your one-stop shop for viewing the lending relationships you have with a member (tracked by SSN), showing your members’ loan balances (including related accounts which the member co-signs). This tool includes contingent liability, credit score, collateral information, service income, and more! The corresponding dashboard lets you analyze this member’s lending relationship via six different analyses, proving a detailed breakdown of the member’s credit scores (with graphing), contingent liability details, delinquency information, etc.

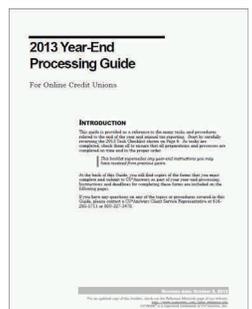
Check out the [Outstanding Loan Recap Dashboard brochure](#) for a quick overview of this feature.



Pick #5: [Where can I find a list of my credit unions year-end responsibilities?](#)

Online credit unions should check out the [2013 Year-End Processing Guide for Online Credit Unions](#) as a reference to the many tasks and procedures related to the end of the year and annual tax reporting. Self processing credit unions should check out the [2013 Year-End Processing Guide for Self Processing Credit Unions](#).

Sign up for the [Year-End Training for Online Credit Unions](#) (12/3 and 12/5 from 11 AM ET to 12 PM ET) or the [Year-End Training for Self-Processors](#) (12/3 and 12/5 from 1:30 PM ET to 3 PM ET).



Refer to the Tricks of the Trade Newsletter Series page for all issues:

http://www.cuanswers.com/tricks_of_trade.php