May 25, 2012

4

Documentation: Tricks of the Trade

CU*BASE Dashboards

TIP #1: Where Can I Find A Listing of the CU*BASE Dashboards?

We are introducing more and more dashboards in CU*BASE—so many that we have updated our “Leadership Dashboards” publication. In it you will now find a listing of all of our dashboards, grouped by menu and listed by menu option. The right column includes a brief explanation of how you can immediately put this dashboard to good use.

Find the 4-page “Leadership Dashboards” under “D” on the CU*BASE Reference Page. Go directly to this publications via:

http://cuanswers.com/pdf/cb_ref/LeadershipDashboards.pdf


CU*BASE® Leadership Dashboards

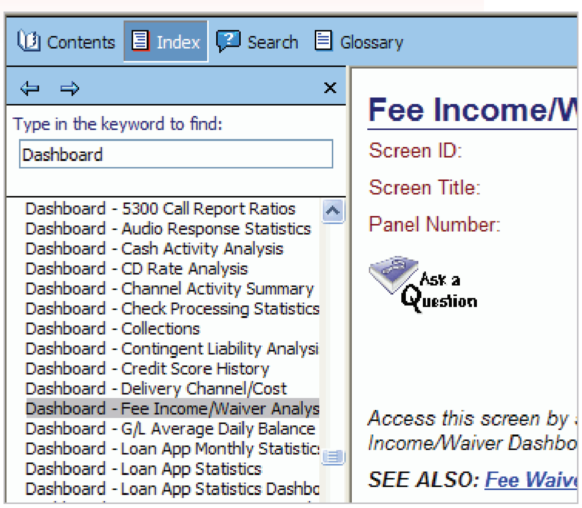
Tools that provide a window on your credit union's day-to-day operations...tools that every credit union leader should know.

January 2012

Management Processing/Dashboards Menu (MNMGMT)	
5300 Call Report Ratios	Analyze 5300 Call Report ratios for the period entered
Check Processing Statistics	Analyze all transmission batches of checks/drafts which have been posted to member accounts
Collections Dashboard/Summary (also accessed via MNCOLL)	Review a complete collections dashboard, displaying your delinquency pipeline
Contingent Liability Analysis	Use this trending tool to expand opportunities and track loan disbursement progress
Fee Income/Waiver Analysis	View and analyze your month-to-month member service fee income and frequency of your opportunities to earn
G/L Average Daily Balance Calculator ("Loan/Share Trial Bal. Review" > F9-ADB Calc)	Calculate the average daily balance for your Member Trial Balance G/L accounts
Loan App Monthly Stats Comparison (also "Loan App Statistics" on MNLOAN)	View how many and what type of loan applications you processed – through the year or during a specific time period
Loan Queue Activity Tracking (also "Loan App Activity Tracking" on MNLOAN)	Get a team-wide awareness of your lending goals and how fast you are moving toward them
Loan/Share Trial Balance Review	Analyze the Member Trial Balance for key components including product applications and Loan-to-Share ratios
New/Closed Account Dashboard	Analyze data on the accounts at your credit union and the members who own them in over 35 different ways
New/Closed Membership Dashboard	Analyze your credit union memberships in over 50 different ways to use as a springboard to evaluate credit union policy
NSF/ANR Management Summary ("NSF Statistics Dashboard")	View a full picture of the NSF and Courtesy Pay income credit-union wide for an entire year
Online Banking/Audio Response Statistics ("ARU/Online Banking Stats Dashbrd")	View statistical information about your members' online and audio banking usage
Tiered Service Monthly Comparison (also on MNMRKT)	View Tiered Service scores side-by-side from multiple months to track your program and how it is motivating members toward higher participation

*Check out the “Leadership Dashboards” publication or a complete listing of dashboards available in CU*BASE.*

Use Index Keyword “Dashboard” to find help topics for the CU*BASE Dashboard screens.



TIP #2: How Can I Quickly Find Help for the CU*BASE Dashboards?

Want an easy way to find help on all of the help topics on the CU*BASE Dashboards? It’s easy to find them by using Index Keyword “Dashboard.”

Check out the “Dashboard Tips” topic as well, for a discussion of questions to ask when comparing one dashboard to another dashboard or report.

TIP #3: What Kind of Information about Dashboards Can I Find in the CU*BASE Online Help?

Check out the CU*BASE Online Help for all kinds of tips on using the CU*BASE Dashboards.

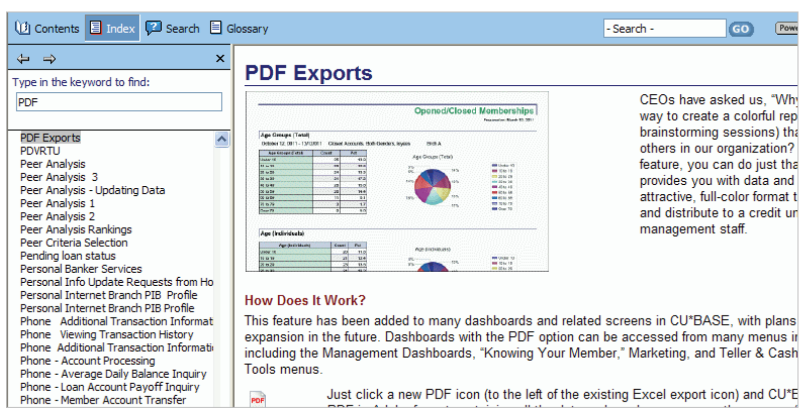
The first sentence lets you know what menu and option to use to get to the dashboard.

Included also are links to topics on creating full color PDFs of the dashboard data, as well as the "Dashboard tips" topic with questions to ask when comparing a dashboard to another dashboard or report.

Some topics also list additional helpful information, such as the Data Source and whether the dashboard is as of a snapshot in time (As of Month End) or current data (Right Now). And that is only the top of the topic!

TIP #4: Where Can I Learn More About the PDF Export Feature?

Use Index Keyword "PDF Export" to learn more about the feature that allows you to create attractive full-color PDFs of your dashboard data and charts—ready for your Board Reports! The "PDF Export" topic provides information on this feature, as well as directions for the purchase and installation of the iText Sharp software required for this feature.



CU*ANSWERS
A Credit Union Service Organization

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