

Team	Release #	To be released to:	On date:
Asterisk Intelligence	AB_19.06	Subscribers	June 9, 2019






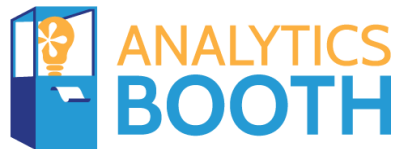
ai@cuanswers.com

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cuanswers.com/solutions/asterisk-intelligence/

Feature Availability Key

-  You'll see it immediately
-  You'll need to activate it
-  There may be related fees



Powered by Asterisk Intelligence

The Asterisk Intelligence team is excited to present these Analytics Booth enhancements. All Analytics Booth subscribers will receive the entirety of this release on June 9, 2019.

Not an Analytics Booth subscriber?

Visit the store: <https://store.cuanswers.com/store/asterisk-intelligence/analytics-booth/>

Interested in Learning More About This Release?

Join the Asterisk Intelligence team for a training webinar!

Tuesday, June 11

3:00 – 4:00 PM ET

[Register Today](#)

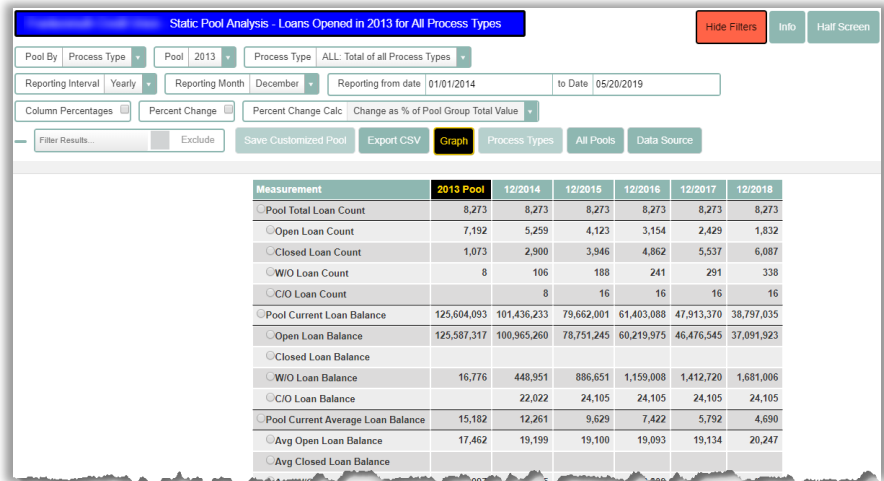
<https://www.cuanswers.com/resources/edu/courses/syllabi/?course=SE.2018.12>

In This Release

✔ New Static Pool Analysis Dashboard Helps Boost Future Forecasting

This new feature helps you analyze and manage your loan pools, track pool performance, losses, and yields, all within Analytics Booth.

You can create your loan pools by loan category, purpose code, or security code, as well as process type and GL account, whichever method you prefer to support your pooling strategy! From there, you can align your reporting periods with your operations (such as



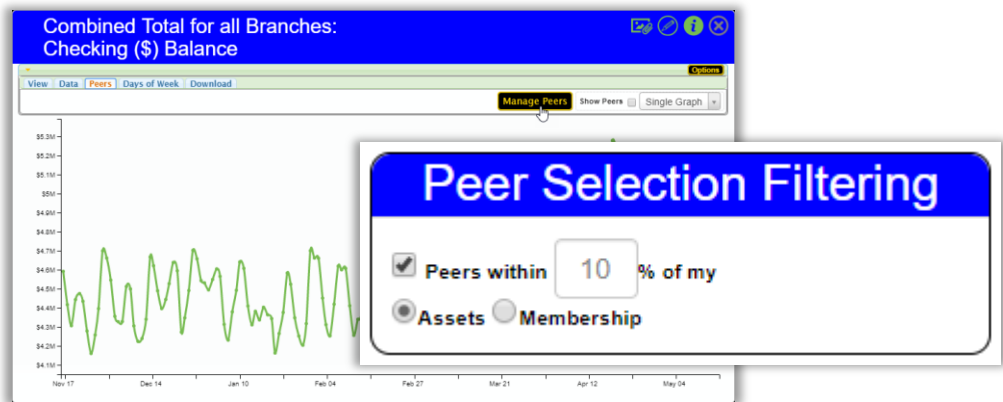
setting them to your fiscal year) and enjoy full control in reporting frequency. This tool can help you review your pool performance and status period to period, quantifying balance changes, losses, and delinquency. You can track and trend pool characteristics through loan maturity, and analyze balance changes, write offs, and loan collateral, period to period. And of course, if you're eager to dig deeper using your own tools and techniques, export the data into a CSV and dive in.

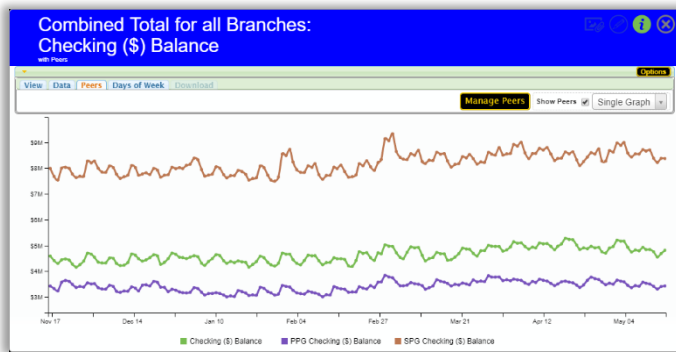
Loan pool data is available beginning with 2013 (if your credit union converted to CU*BASE after 2013, your loan data will begin at conversion date). These loan summary files include all the loan history dating needed to use for analyzing future trends and help forecast your credit union's CECL (Current Expected Credit Losses) calculations.

✔ Peer Group Trend Graphing Feature Added to Over 225 Trends!

We have added the familiar apples to apples comparison of learning from a peer in this easy to use peer group filtering and analysis, available for all Trends in Analytics Booth.

This feature allows a user to define a *Primary Peer Group* consisting of 3-5 credit unions within the specified assets or membership range, and a *Secondary Peer Group* consisting of 3-20 credit unions within the specified range. While within the peer selection, simply enter your filtering ranges and use the + key to add credit unions.





Once you've defined your Peer Groups, selecting the "Show Peers" checkbox on the **Peers** tab of the trend graph options will generate a graph that shows the value for the selected measurement for your credit union as well as the average value for each of your configured peer groups! Select from a Single Graph (pictured), a Triple Graph with stacked trend lines, or an indexed graph.

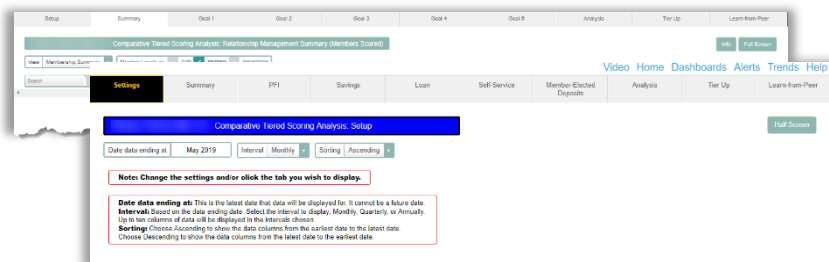
As we realize that individual credit unions have different configurations that may

skew the trend graph, we've provided the ability to configure which days of the week you'd like to view within your graph. Use the Days of Week tab within the trend line options and select or deselect which days you'd like to view, such as excluding weekend days you may not be open.

✔ Comparative Tiered Scoring Analysis Gets a Makeover

You know the comparative tiered scoring analysis; an awesome tool that can trend member product and service engagement over customizable intervals (monthly, quarterly, annually), easily show penetration statistics over time, and offer the Learn-From-Peer feature to analyze market position. This tool is a real gem when it comes to benchmarking your operations to that of your peers!

With that said, the functionality of this tool remains the same, but we've revamped the Comparative Tiered Scoring Analysis to get more bang for your buck. Seamlessly update your settings on the Settings tab while staying within the analysis with simple drop-down filter selections. Coast through the tabs with confidence as each goal is clearly labeled within each tab – your data is still all there, but easier to flow through than ever without backtracking. You may also notice some new color schemes within the dashboards; we're experimenting with colors to find that right aesthetic niche...feel free to reach out and let us know what you think!

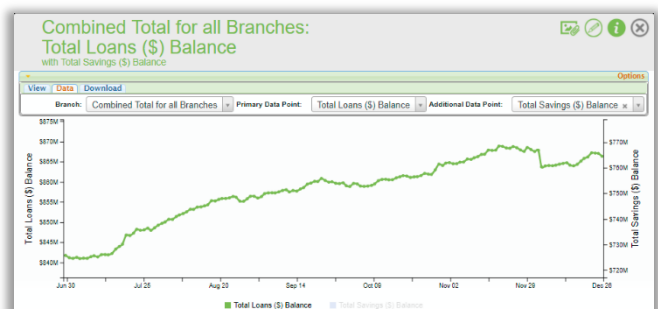


Noticing blank lines in your data? Turn those services on for maximum impact! Tiered Services criteria can be configured using **CU*BASE Tool #853 Tiered Service Levels Program Config**. Note that changes in configurations will not be applied retroactively.

✔ A Powerful Wave: More Power Lines Buttons

As previously announced in [CU*BASE Release 19.05](#), additional Power Lines integrations have been completed!

Using the Trend lines built for you each day in Analytics Booth, Power Lines is a CU*BASE button that will launch a trend-line graph in Analytics Booth to help you better understand your data.



Previously released are new Power Lines function for these tools:

- **Tool #2 *Work/View Loan Application Status***
- **Tool #218 *Closed Membership Report***
- **Tool #229 *Collections Dashboard/Summary***
- **Tool #455 *Loan App Statistics Inquiry***
- **Tool #468 *Loan Payments Analysis***
- **Tool #484 *Look-to-Book Ratio Analysis***
- **Tool #553 *New/Closed All Memberships Dashboard***
- **Tool #591 *Portfolio Analysis - CDs***
- **Tool #596 *Portfolio Analysis - Savings***
- **Tool #979 *Where Your Members Shop***

Take Up Space: Dashboards Now Default Full Screen with Hidden Filters

There's a lot of data awaiting you in Analytics Booth, and we want to show you as much of it as we can! Break free of the screen size limitations within CU*BASE when viewing your dashboard; we've maximized the screen real estate in a few new ways. Now, when selecting a dashboard, the default display is full screen, instead of the previous half page. Additionally, filters will automatically be hidden. Do you like your data a bit smaller in stature? No biggie – you can easily toggle half/full screen and view/hide filters with a click of a button.

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