ANALYTICS BOOTH Features and Services Upgrade

Release	Release Audience	Release Date	Publication Date
AB_20.02	All Subscribers	February 23, 2020	February 7, 2020

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Exploring the Release with Josh Peacock

Asterisk Intelligence Product Development Manager/Business Development



This release has two significant areas worth noting. First, we put a lot of focus into the integration of the Executive Level Data Points. As a result, this information has a much more prominent position in both the Trends and Alerts areas of Analytics Booth.

The second area worth noting due to its significance is our first round of major visual changes taking place in 2020. Each of the three planned Analytics Booth releases in 2020 will have a visual impact on the website. Piece by piece, we are

aiming for a website redesign. When we first launched Analytics Booth in early 2015, we started with the Trends and Alerts product lines. In 2017 we released our third element, Dashboards. This means the look of these products have gone relatively unchanged since their inception! With that in mind, we think it's the right time to give the site a visual makeover and introduce some more modern behind the scenes technology to help support future development efforts, as well as be able to provide more detailed help and additional goodies on the web. With all this in mind, we're very excited about the initiatives we have in the works for 2020.

Training and Information Sessions

Join the Asterisk Intelligence team for a web-hosted release review

Wednesday, February 19 @ 3:00 – 4:00 PM ET Wednesday, February 26 @ 4:00 – 5:00 PM ET

Register Today

cuanswers.com/resources/edu/courses/syllabi/?course=AB%2020.02



Reminder: Updated Terms of Service

The first time you log in to Analytics Booth following the AB_20.02 release, you will be presented with the Terms of Service, which you will need to accept in order to proceed. After you've accepted, you will no longer be presented with the Terms of Service window, however, you can review the TOS at any time by selecting the Terms of Service link from the bottom of any page. This enhancement is a result of the documented changes to the pricing model for Analytics Booth, effective October 1, 2019.

In This Release

The Executive Summary: The Data You Want, Right at Your Fingertips

Executive Summary: Trends

This release brings the data you need directly to you, fast. We've reconfigured the Trends page so that upon entry, the first item you see in the Additional Trends column is the Executive Summary information, queued up and ready for your click. No more drilling down within the graphs

ADDITIONAL TRENDS	0
Executive Summary Data	Show/Hide
Credit Union Total (#) Accounts	VIEW TREND
Credit Union Total (#) SSN	VIEW TREND
Total Loans (#) Accounts	VIEW TREND
Total Loans (\$) Balance	VIEW TREND
Total Savings (#) Accounts	VIEW TREND
Total Savings (\$) Balance	VIEW TREND

to access these data points; this improvement places the data most utilized by analysts within the first few clicks of the morning.

Aside from selecting these data points within the Additional Trends segment, the Executive Summary Data has been moved to the top of the mini-graph Trend selection when using the drop down on any applicable main graph, so whichever way you prefer, the data is at the ready.

Most importantly, the pre-defined Executive Summary package has not changed – they are still the Trends that you have come to depend on for quick information on the health and balance of your credit union.

Create a New Alert					
Credit Union					
Send an alert for*	Data Report				
If it changes by*					
Compared to	Executive Summary Data				
at the following branches	Credit Union Total (#) SSN Total Loans (#) Accounts Total Loans (\$) Balance				
Alert delivery address	Total Savings (#) Accounts				
Also send this alert to	Total Savings (\$) Balance Balance Data Shares (#) Accounts Shares (\$) Balance Shares Average Balance Checking (#) Accounts Checking (\$) Balance v				

Executive Summary: Alerts

In addition to highlighting the Executive Summary within the Trends, this release harnesses the power of the Executive Summary within the Alerts feature as well. The Executive Summary data points are situated right on top of the data point list when configuring a new alert, allowing you to easily create Alerts based on the pre-configured Executive Summary data points package.

Easily Download Data to .CSV with the New CSV Download Button

Have you ever wished to export multiple Trend line opportunities to combine them for your own custom analysis? Or, have the full listing of data to back up the Trend graphs you're presenting your board? Now, from within the Trends, the new CSV Export option allows you to quickly export data for custom or combination analysis within Excel!

Updated User Interface for Graphing Options in Trends

In our ongoing efforts to utilize smart web design across the Analytics Booth site, we've targeted the Trends graphing options for this release, and we're excited to share the optimized new look with you.

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\$5.1M - \$5M - \$4.9M -	Combined	ng (\$) Balance Total for all Branches			E# 🖉 🚯	
\$4.8M - \$4.7M - \$4.6M -	Branch:	Combined Total for all Branches	Primary Data Point: Checking (\$) I	Balance Additional Data Point: Se	Graphing Preference	es
\$4.5M - \$4.4M - \$4.3M -		Show	Annotations	Peers	Show Days	
\$4.2M - \$4.1M - \$4M -		Trend Avg.	Public	Single Graph * Manage Peers	Sun V Mon V Tue V Wed V	
\$3.9M Aug 01					Thu 🛩 Fri 🖌	
	Dates:	Last 180 Days 🔻 - or - 2019-08-	01 🗰 2020-01-22 📾		Sat 🖌	

This comparison shows the current graphing options with the new look laid over top. Visually refreshed with a modern color palette, the new look dismantles the tabbed options into an easily readable common page that allows all preferences to be selected at one time, without flipping through tabs to navigate. The date filter criteria shows the calendar icon for ease of use, and all options are displayed prominently and organized with the data analyst user in mind. Simply set your preferences and select to show the graph or use the arrow to open and close the preferences window.

"Average" Data Point Visual Enhancement

We've also made a minor improvement on the visual display of the Average indicator over top of the Trend line graph, by enhancing the text background and allowing the data point to be more easily read when selected to view on screen. This enhancement also applies when downloading the image for use in additional materials.

