ANALYTICS BOOTH — Features and Services Upgrade

Release	Release Audience	Release Date	Publication Date
AB_20.06	All Subscribers	June 28, 2020	June 19, 2020

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Exploring the Release with Josh Peacock
Asterisk Intelligence Product Development Manager/Business Development

A sharp focus on data, analyzing impacts, preparing for an uncertain future, and using our tools to secure the best possible outcomes for our staff, members, and communities is of the utmost importance this year in particular, and our hope is that the new features within this release provide clarity and further precision in analyzing key data points for your credit union activity. We are very proud to deliver this release to subscribers to assist in these efforts.

This release continues our 2020 plan to update the visual appeal of the website; a tighter top navigation optimizes screen real estate, and updated fonts and minor palette changes spread throughout. We've used this release as an opportunity to refine the language in the Analytics Booth lexicon as well as the power behind it; while configuring All Alert notifications, take note that you are now selecting what *Reporting* is delivered to you. A highlight of the release is when configuring single Alerts, Analytics Booth now provides three new configurable metrics to enhance the reporting flexibility to give you the information that really matters. Additionally, you'll find requested upgrades that we are sure will simplify the daily flow. We hope to see you in an information session so that we can share our enthusiasm and plans for our continued collaborative successes.

Training and Information Sessions
Join the Asterisk Intelligence team for a web-hosted release review

Thursday, June 25 @ *3:00 – 4:00 PM ET*
Thursday, July 9 @ *4:00 – 5:00 PM ET*

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New Ways to Finesse Reporting in the Upgraded Alerts Interface

All Alerts Reporting Made More Granular

The Alerts feature sure got a makeover this release! Currently, the option to receive All Alerts delivers exactly that – all applicable alerts for all data points for every day of every month for your selected branches. While we respect the all-in attitude, we think most users will appreciate a more refined experience.

After release implementation, you will see that when selecting All Alerts, new branding indicates that you are curating a Report based on the available criteria, which is displayed as fast click-select options to quickly and easily configure the specific frequencies you wish to see. We are excited to bring this change to drill down into the ethers of "everything" reporting to provide a clearer scope of your credit union activity.

New Methods of Tracking Changes

With this release, we are introducing new ways to track your credit union's activity and further refine the notifications that you receive. While Alerts were designed to notify users when data points changed, we knew there were data experts who always want the immediate reflection of *particular* points of data in relation to *specific* movement. To assist the data wizards in truly homing in on their information, the new comparative criteria will allow you to track if the value you are monitoring,

- changes by X
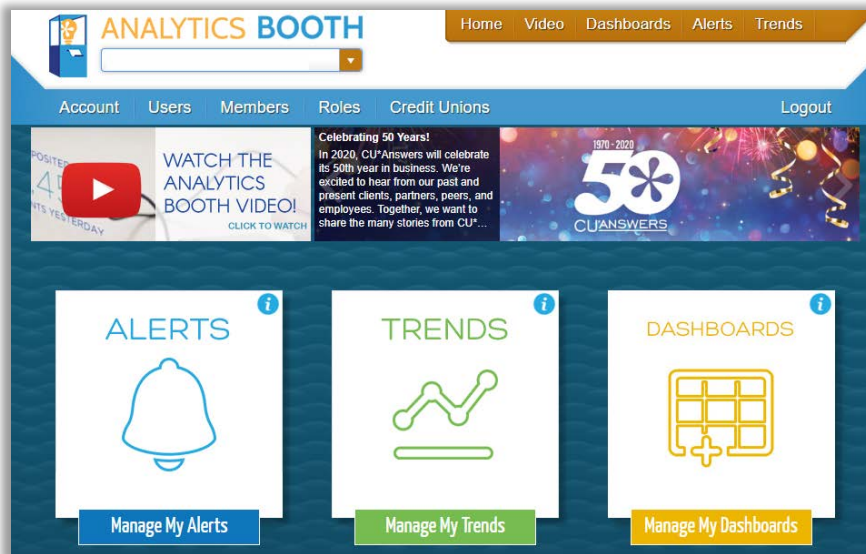- increases by X
- decreases by X
- reaches X

with X being the same configurable monetary, numerical, or percentage goals as always. These options allow the data the tell your story; are you looking for upward movements? Dips in the Trend? Specific milestones in which to celebrate or enact emergency plans?

Since data can be fluid, we've configured the system to be smart enough that when selecting the new option, Reaches X, the Alert will apply to the first occurrence of the threshold configured. As an example, if your credit union has a goal to celebrate when reaching 20,000 members, only the first occurrence will trigger an alert notification. So even if your membership changes from 20,001 to 19,998 to 20,002, only one notification is sent, and after the occurrence is satisfied, the Alert is disabled and the user will need to reenable it.

We have made alert activation and deactivation a one-click process; simply select the Active/Inactive button on each configuration screen to easily toggle that data point.

Continuing Visual Upgrades with Improved Top Navigation

Our goal with Analytics Booth is not only to provide integral data analysis each day for your credit union, but also to deliver a well-designed and modern website that is functional, simple, and optimized for all users.

As we continue our 2020 plans to visually rework the Analytics Booth site, we've refreshed the focus on the top navigation, eliminating the static and making the best use of the space. This optimizes the user experience and allows the focus to remain on the data at hand.

Save Preferences for Faster Return to Trends Analysis

To accompany the updated graphing preferences in the last release, we've added an often-requested feature that is sure to be enjoyed by the power user and casual browser alike. Now, the site will automatically save selected graphing preferences per user! The preferences save between sessions, across all graphs, just for you – talk about tailored. Additionally, we've nipped the Sunday start and have grouped weekend days together for easier selection or deselection of weekends.

Spotlight on Video

We are building our video reference library! These OnDemand videos answer questions about using the site, as well as deeper dives into some of the data points. Have an idea or request for a video? Let us know!

- Analytics Booth First Time Login
- Resetting Your Analytics Booth Password
- An Introduction to Analytics Booth Features
- Analyzing Peer Group Data
- Configuring a Primary Peer Group
- Configuring a Secondary Peer Group
- Reviewing Loan Portfolio Growth Using the Analytics Booth Balance Data Option
- Reviewing Loan Portfolio Growth Using the Analytics Booth Executive Summary Option

And don't forget to check out all of the OnDemand Data Analytics videos!
https://ondemand.cuanswers.com/channel/data-analytics/

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