

GETTING STARTED GUIDE

HERE'S WHAT YOU NEED TO KNOW

Welcome to Analytics Booth, this document will help guide you through logging in and setting up common first-time tasks.



ANALYTICS
BOOTH

FIRST 5 THINGS TO DO

Create Your Password

- 1) Follow the link in the "Your Password Reset Link" email
- 2) Enter the same email address that the "Your Password Reset Link" email was sent to
- 3) Enter your password
- 4) Confirm the password
- 5) Click the "Reset Password" button

**password must be at least 8 characters.*

Get Alerts

- 1) Click on "Manage My Alerts"
- 2) Click on "All Alerts, Just Send Me Everything" This will do just what it says, send you an alert for each category of data every day.

Create A Custom Alert

If you don't want to be sent everything, you'll want to choose to create individual alerts for the categories and data points you need to be alerted for.

- 1) Click "Create a New Alert"
- 2) Fill in form
- 3) Click "Save Alert"

View Trends

You can view trends for any of the 70+ different types of data that are currently being collected. These trends are listed below the 10 mini-graphs under the title "Additional Trends."

Explore Dashboards

Explore dashboards and choose from 7 full dashboards to analyze the details behind your product portfolio numbers, member engagement, and general ledger activity.

ADMINISTRATOR TIP

See page 3 for instructions to add users



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ASTERISK
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HAVE A QUESTION?

CONTACT ASTERISK INTELLIGENCE

ai@cuanswers.com
(800) 327-3478 x870
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LOOK INSIDE FOR MORE INSTRUCTIONS

FIRST TIME LOGGING IN

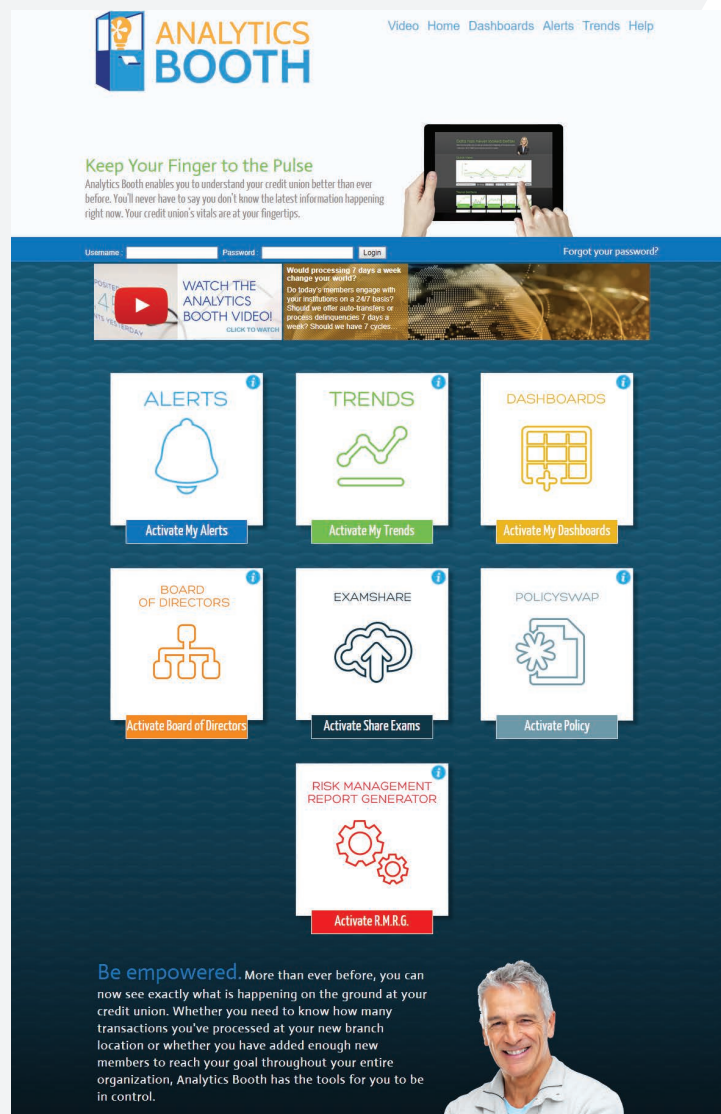
If you have already enrolled you will receive an email from alerts@analyticsbooth.com with your email address and a password reset link.

Once you receive the email, you will have one hour to fill out and submit the password reset form. After an hour, the form will expire and you will have to go back to analyticsbooth.com and use the "Forgot your password?" link to generate a new password reset email.

GET FAMILIAR

Once you've logged in and set your password take a few moments to familiarize yourself with the site. At the top of the page you have the option to watch a video demo of Analytics Booth, get help, and more. In the center of the screen are the seven boxes that represent the main functions of Analytics Booth.

Every Analytics Booth subscriber can access the Alerts, Trends and Dashboards sections of the site, however your credit union may have limited access to some remaining sections.



If you have not received an email, please check your spam folder and add alerts@analyticsbooth.com to your address book. If you need to have the email resent or you have forgotten your password you should visit:

[ANALYTICSBOOTH.COM/PASSWORD/EMAIL](http://analyticsbooth.com/password/email)

Support Email: ai@cuanswers.com
Support Phone: 800.327.3478 x870
Knowledgebase: kb.cuanswers.com

My analyticsbooth.com Account Information

First name

Last name

Email

New Password
- Must be at least 8 characters-

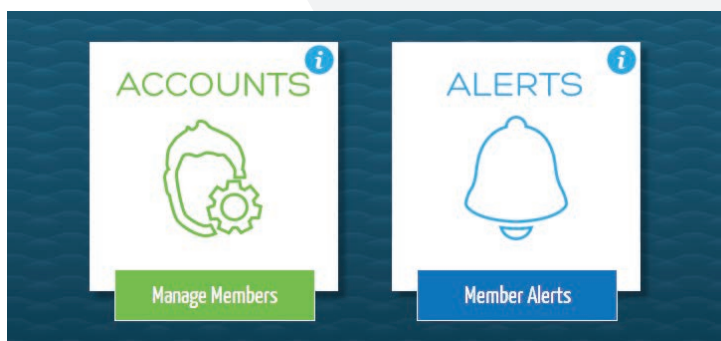
Verify New Password

MANAGE ACCOUNTS

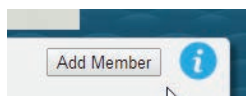
If you are a user with Administrator permissions, one of the first things you need to do is learn how to add an additional member to manage your Analytics Booth account. This can be done by clicking on “Member Management” on the blue horizontal Welcome Bar positioned between “My Account” and “Logout.”

My Account | Member Management | Logout

There are two categories for management once you’ve clicked into this section: Accounts, Manage Members and Alerts, Member Alerts.



Click on the Accounts box and this will bring up a screen that allows you to Add or Manage current accounts.



Click “Add Member” to bring up a screen with a form that will allow you to create a new account. You need to assign each account to a permissions group.

PERMISSIONS GROUPS

Administrator

An administrator can add additional accounts to their Analytics Booth services.

User

A user can only view and manage their own alerts and view trends. A user is unable to add additional accounts.

After you’ve completed adding accounts, go back to the Member Management screen to view Member Alerts. This page allows you to review and confirm each of the alerts that are activated and being sent to each user.



A user must have an account to view trends, work with dashboards, and set up their own alerts, however, a user can send alerts to any address, even those without an account.

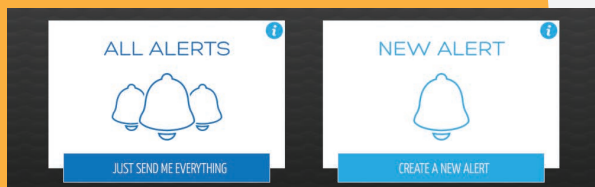
ADMINISTRATOR TIP

It’s your responsibility to manage access to Analytics Booth.

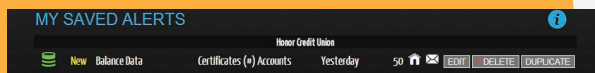
Setup a second administrator account in your credit union to help you out.

ALERTS

Access Alerts by clicking the box with a bell icon that reads “Manage My Alerts”. This will bring you to a screen with several important sections



Custom alerts you have created will show up within a section entitled “My Saved Alerts”. You can edit or delete any of your custom alerts from here.

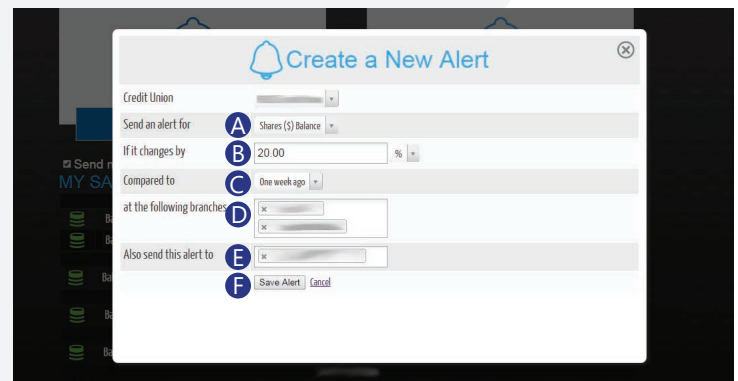


All Alerts, Just Send Me Everything

This choice will do just what it says, send you a combined daily alert for every data point.

New Alert, Create a New Alert

This choice allows you to create individual alerts for any of the 70+ data points via a pop-up form which allows you to make your alert selections.



SETTING UP A CUSTOM ALERT

- A** First you can choose to send an alert for one of 70+ different types of balance data, transaction data, and member data.
- B** Next you need to enter a numeric value for how much the data type has changed in order to trigger an alert. You can choose from a quantity (#), percentage (%), or dollar amount (\$).
- C** Third you'll select a timetable for when to compare the value you've set. You can choose to compare to one day ago, one week ago, or the average from the past 30, 90, 180, or 365 days.
- D** You may then choose branches to monitor. You can choose a single branch, multiple branches, all branches, or a combined total for all branches. *By choosing all branches you'll receive a separate line for each branch on your report.
- E** Add additional recipients to this alert by adding email addresses separated by a comma between each address. Each address you add to the list will be sent an email with a confirmation key that needs to be activated before the recipient will begin receiving the custom alert.
- F** Once you've completed entering information into the form click “Save Alert” and you should be prompted that your new alert has been created. Click “Done” to go back to the alerts page.



FIRST TIME USERS

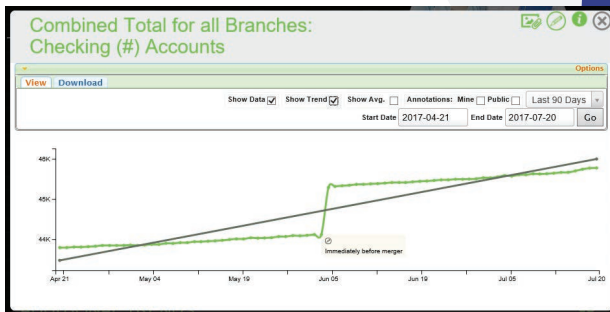
We recommend that you select the “Just Send Me Everything” option for the first few weeks. This will allow you to see all the available data and help you discover which important areas you need to keep an eye on.

TRENDS

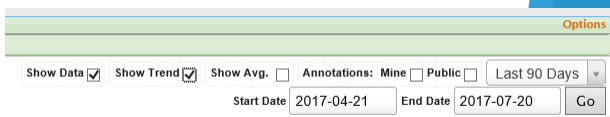
The first time you visit the Trends section of Analytics Booth you'll see ten recommended mini-graphs to review.



You can click on any of these graphs to see them in full-size view. By default, these trends will show the combined total for all branches for the past 180 days.



You can select a different date range on any graph two different ways. First you can use the drop down to select between seven different predefined ranges from 7 days to 1 year. The other option is to manually enter a specific start- and end-date.



The figure shows the 'Options' panel for the graph. It includes checkboxes for 'Show Data', 'Show Trend', and 'Show Avg.'. There are also checkboxes for 'Annotations: Mine' and 'Public'. A dropdown menu is set to 'Last 90 Days'. Below these are input fields for 'Start Date' (2017-04-21) and 'End Date' (2017-07-20), followed by a 'Go' button.

Along with setting the date range you can also view a linear trend line and you display the average. Both of these options can be turned on by clicking the checkbox next to each label at the top of the graph.

In addition to the 10 mini-graphs, you can view trends for any of the 70+ different types of data that are currently being collected. These trends are listed below the 10 mini-graphs under the title "Additional Trends." View the list of trends for each of the data categories by clicking on the green row with the corresponding label you're interested in exploring.

ADDITIONAL TRENDS i	
Balance Data	Show/Hide
Member Data	Show/Hide
Transaction Data	Show/Hide
Certificates (#) Deposits	VIEW TREND
Certificates (#) Withdrawals	VIEW TREND
Certificates (\$) Deposits	VIEW TREND
Certificates (\$) Withdrawals	VIEW TREND
Checking (#) Deposits	VIEW TREND
Checking (#) Withdrawals	VIEW TREND
Checking (\$) Deposits	VIEW TREND
Checking (\$) Withdrawals	VIEW TREND
Escrow (#) Deposits	VIEW TREND
Escrow (#) Withdrawals	VIEW TREND
Escrow (\$) Deposits	VIEW TREND
Escrow (\$) Withdrawals	VIEW TREND
Loans - Closed End (#) Deposits	VIEW TREND
Loans - Closed End (#) Withdrawals	VIEW TREND
Loans - Closed End (\$) Deposits	VIEW TREND
Loans - Closed End (\$) Withdrawals	VIEW TREND
Loans - Open End (#) Deposits	VIEW TREND
Loans - Open End (#) Withdrawals	VIEW TREND
Loans - Open End (\$) Deposits	VIEW TREND
Loans - Open End (\$) Withdrawals	VIEW TREND
Shares (#) Deposits	VIEW TREND
Shares (#) Withdrawals	VIEW TREND
Shares (\$) Deposits	VIEW TREND
Shares (\$) Withdrawals	VIEW TREND
Cash Data	Show/Hide
Delinquency Data	Show/Hide
In-process Data	Show/Hide



TOOL TIP



Look for the "i" in the circle to find helpful information on any section you're viewing.

DASHBOARDS

When you visit the Dashboards section, you will be able to view detailed tables AND graphing presentation options. All available dashboards support the following features for maximum control of your data.

TOP 10 DASHBOARD TIPS

- 1 Custom View: Each Analytics Booth data table is completely customizable! Rearrange the order of columns by simply clicking and dragging column headers. Right click on any header to hide or unhide data columns.
- 2 Calculation - Visualize: Right-Click on any data column and select “Visualize” to quickly identify the top and bottom portfolio contributors even with your table sorted by other fields.
- 3 Calculation - Vertical Analysis: Right-Click on a data column and select “Vertical Analysis” to immediately see your data as a weight of the entire portfolio. Curious what percent of your loan portfolio is comprised of used auto loans? Or mortgages?
- 4 Calculation - Change Over Days: Right-Click on a column and select “Change over Days” to calculate the net change year-to-date, month-to-date, prior 30 days, since a custom date, and more.
- 5 Download: Looking to export your data for further manipulation? Want to explore some different visualization strategies? Use the “CSV” Export button to quickly export your data allowing you to further analyze and manipulate your data!
- 6 Focus with Sorting: Click on column headers to quickly sort your data by the field you want! Each Column has what we call a 3-way sort. Ascending, Descending, and original order giving you control over how your data is displayed.
- 7 Full Screen: Use the top-right “Full Screen” button to maximize your use of space. This feature is especially helpful when viewing the graphs, but always keeps the most data in view!
- 8 Graphing: Select any line item and graph it! The feature defaults to 30 days but you can pick the time-frame of your choice, including custom date ranges.
- 9 Graph Navigation: Hover over the graph line to immediately see details on each data point, including a calculation of change compared to the beginning point of the graph.
- 10 Annotations: Select any data point and log a quick note to explain its context. Make the annotation public for other users to see, or keep it private for your personal records.

Current Average Rate	Low Rate	High Rate	# Loans
2.690	2.690		

Hide

Unhide

Date

07/18/2017

View

Loan Categories

Search

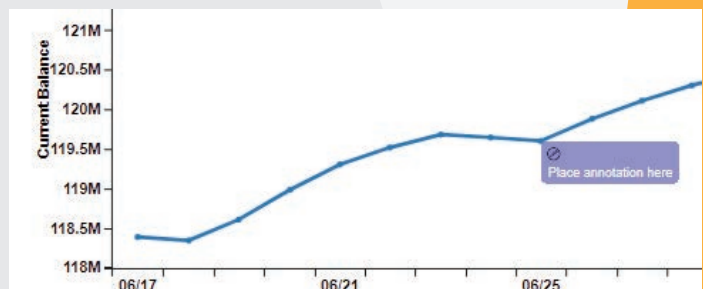
Exclude

Right click a column to view available options.
Left click on any column heading to sort.

Showing 130 of 130 Categories

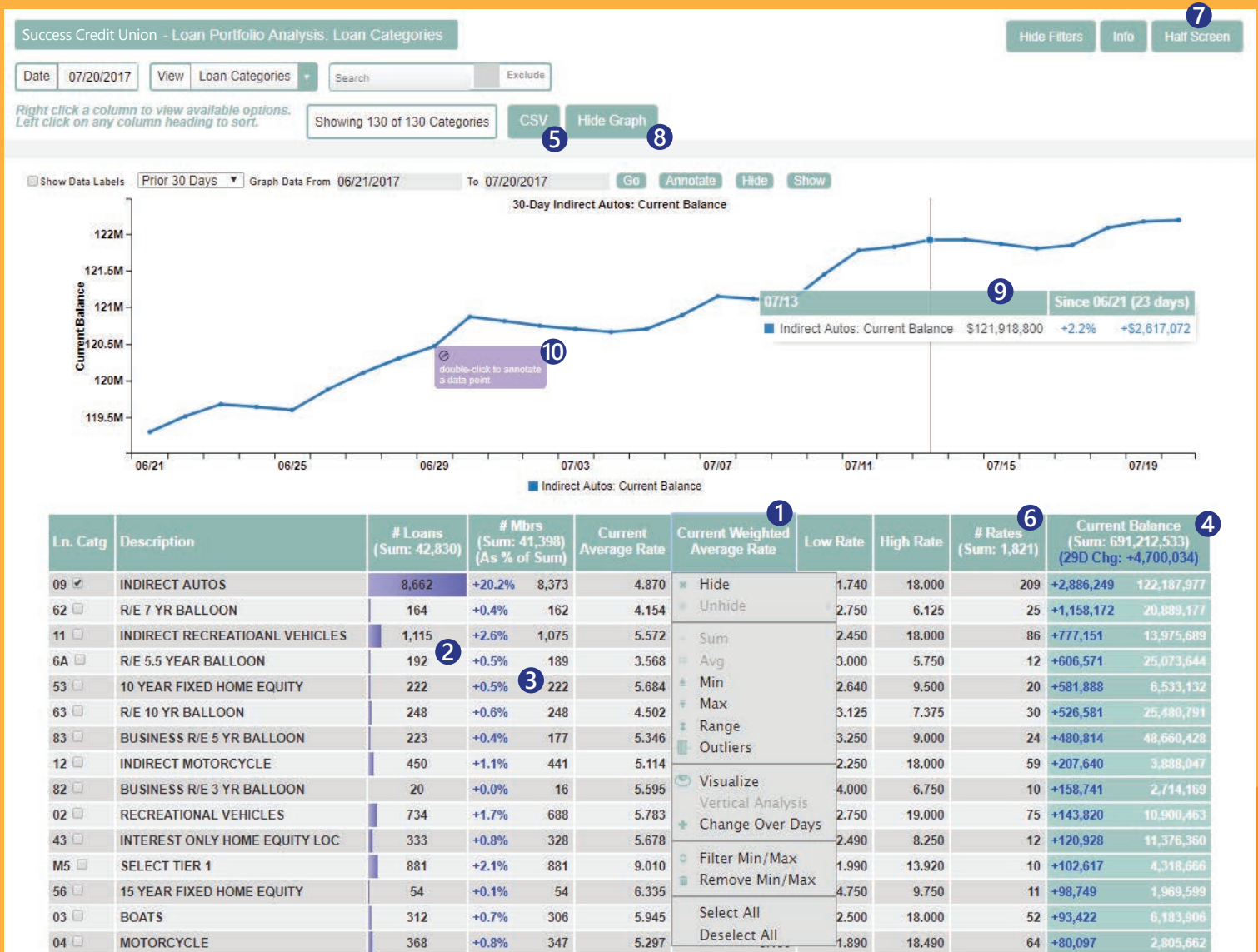
CSV

Graph



EXAMPLE DASHBOARD

Each label you see on this example corresponds to one of the Top 10 Dashboard Tips located on the previous page.



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 Knowledgebase: kb.cuanswers.com



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