

## Web and Software Update Release Information

Including Updates from February, 2018

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## New Features

### Trends

#### Executive Summary Feature

Added an Executive Summary section containing six new values. Now you can trend any two of the 70+ data points on one graph. The six additional data points are:

- A. CU Total # of Accounts (Members)
- B. CU Total # Unique Accounts (SSN's)
- C. Total Number of All Loan Accounts
- D. Total Balance of All Loans
- E. Total Number of All Savings Accounts
- F. Total Balance of All Savings



Use this feature to analyze data points alongside each other and look for correlations or test a hypothesis about your data. Then use existing capability for exporting graph images to transfer your findings into a report or send along to a colleague for review.

#### Daily Data Collection – Membership Counts

CU\*Base Membership Counts are now collected and stored in the Analytics Booth warehouse on a daily basis. These counts were originally being sent on a monthly basis for certain features. However, with the addition of the Executive

Summary an accurate member account became necessary to collect on a daily basis. Trending is already done daily for each of the 70+ data points in the Trend system, and now you can also plot membership counts alongside any the options.

## Dashboards

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### Current Year Forecasting – Ten Year Trends

Added forecasted values when graphing current year in the Ten Year Trends Dashboard. The graphs no longer dive down to a zero value for current month data. Instead, the graphs are expanded to include the full calendar year and calculated values are filled in for any remaining months. Calculations are based on history of the relevant general ledger's activity per month so far in current year.

## Updates and Upgrades

### Trends

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#### Tooltip Dates

Updated the format of the Tooltip Dates when hovering over a data point in a trend graph. Currently it shows Wednesday November 1, 2017 and is being changed to a shorter Wed, Nov 1, 2017. This is also consistent with the date format of Tooltips available in the Dashboard Portfolios when trending data.

## Dashboards

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### Portfolios - Default View

Changed the Default View configuration on all three Portfolio Dashboards (Loans, Savings and CD's). was modified to always choose the 2<sup>nd</sup> available report option when entering any of these dashboards. We did this because the 1<sup>st</sup> available report option was Budget Groups and at the time of this release less than half of our credit unions have budget groups configured in CU\*BASE. As a result, the portfolios came up with no data until users manually selected a new report type.

### Portfolios - Tooltip Dates

Modified the format of the Tooltip Dates when hovering over a data point when trending Portfolio information (Loans, Savings and CD's). The new format will be a shorter version as Wed, Nov 1, 2017. This is also consistent with the date format of Tooltips in the Trend system.

### Tiered Services

Improved the Tiered Services Application Learn-from-Peer Membership size. In some cases, this was being mis-reported and did not match the membership size that's shown on the Summary page of Tiered Services.

### Software Help Documentation

Update the INFO button on the Portfolios (Loans, Savings and CD's) to reflect new times for PROD and Site Four data collection and add supported devices.

# Member Management

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## Users of Multiple Credit Unions

Corrected an issue when doing user maintenance via Member Management. When attempting to do maintenance on user whose email address is attached to multiple credit unions, a message will now display and maintenance will be restricted unless done by a data center user.

*END*



**Questions about the release?** Contact an Asterisk Intelligence team member today for more information on how these features benefit you and your data. [ai@cuanswers.com](mailto:ai@cuanswers.com)