

Release	Release Audience	Release Date	Publication Date
AB_22.06	All Subscribers	June 19, 2022	June 6, 2022

Exploring the Release with Josh Peacock

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While not too well-versed in the world of makeovers on a personal scale, I have to admit that I am a big fan of them in my work world. Whenever our core software product CU*BASE gets a facelift, or our online documentation is refreshed with new styles and skins, or even when we re-brand our logo for a special event, I feel a renewed energy and drive to focus on making the internal components of our products and services match the fresh outward appearance.

With that said, you may be able to infer what the theme of this release is – a continued freshness and modernity in our toolsets that breathes new life into the Analytics Booth products. This release in particular focuses on bringing our dashboards up to the new standards, in both aesthetic and navigation qualities, as well as introducing some new features and capabilities that increase the deliverability of these valuable data mining and analysis tools. Some key improvements we've focused on include,

- New export options for graphing
- Upgraded tables, filtering, and display qualities
- New columns of data, including a month-by-month breakdown of the last 10 years in the **10 Year Trends** dashboard
- And new search and selection capabilities to fine tune your data

My team and I have been working hard this year to create a standard that we can apply to all of our current dashboards, and those that are in development for the future. As you'll see in the release notes below, we've made these updates to the **Interest Loan Accruals, Dividend Accruals Shares and Certificates, the 3 Year Balance Comparison, and 10 Year Trends**, to join the already refreshed **Loan, Savings, and Certificate Portfolios**. In a future release, we'll tackle the **Tiered Services Comparison** and the **Online Banking Optics** dashboards to complete the sprint.

We hope that you enjoy these updates as much as we do, and we can't wait to catch up with you in a training session – see below for registration information.

Training and Information Sessions

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

[Wednesday, June 8 @ 3:00 – 4:00 PM ET](#)

[Wednesday, June 22 @ 3:00 – 4:00 PM ET](#)

In This Release

Updates to the Accruals Dashboards, 3 Year Balance Comparison, and 10 Year Trends: Applying Standards, New Filter Grouping, and Enhanced Graphing

We've continued to upgrade our dashboard suite with the new dashboard standards that we introduced in the last release, including new charting, and an updated, modern interface. We've also added additional filtering options to all dashboards. The 10 Year Trends dashboard received an upgrade with new columns and even more data points. Read on for what you can expect with the changes in this release:

New Interactive Data Table Interface

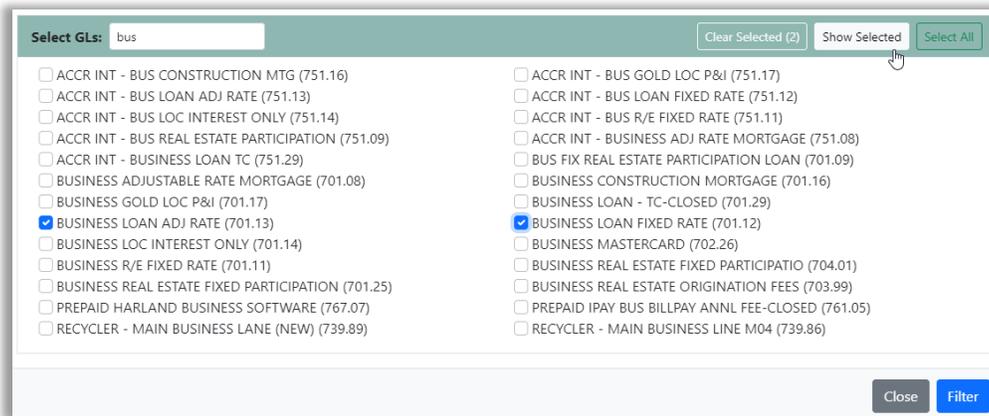
The new standard charting that we are applying throughout the dashboards comes with a sleek interface; each column is sortable using the up/down sort indicators in the column headers. We've reordered the columns to follow the logical sense with the math, putting the most frequently analyzed columns first. With this new charting option, achieving a graph becomes a one-click process, by simply selecting the graphing icon from the code column. Finally, a new search field has been added to allow users to find exactly what they need within the data table.

More Points of Data Plus More Visual Charting in Graphing Updates

Moving on to the new graphing, more points of data are now easily visible and accessible with a hover or a click. The graphs are also more complete, featuring a header and footer to distinguish the graph – even better for direct insertion in your board packet! Included in the graphing package is the ability to select an additional data point to add to the graph. We recommend using the filter options to select the codes that you would like to view, then using the Additional Data Point drop down to select an additional line of data for the graph.

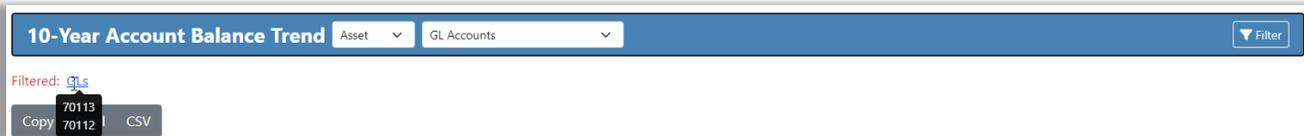
Updated Filtering Selection and Display

The filtering capabilities have received a major upgrade in this release. When selecting the Filter button at the top of the dashboard, a pop-up screen will appear, allowing users the ability to search for selected GLs, use multi-select to choose multiple criteria, or select all/clear all choices. Additionally, you can view only the selected filters by using the Show Selected option in the filter screen.



Updated Filter and Header Selection Area

As introduced in the last release, the heading area of each graph is more aesthetic and succinct. Additionally, the Filter now allows for multi-select, allowing users to select multiple codes or categories. This new ability allows subtotaling selected groups of items. When filtering, selections will be shown in the top section of the dashboard, to view, hover over the link to see the selected groups or GLs.



10 Year Trends and 3 Year Balance Comparison Dashboard Upgrades

Both the 10 Year Trends and 3 Year Balance Comparison dashboards got a performance boost this release, with decreased load times for quicker data on the go. Both dashboards also received the aforementioned new filtering capabilities, and new filter grouping.

10 Year Trends: New Columns and Data Sets

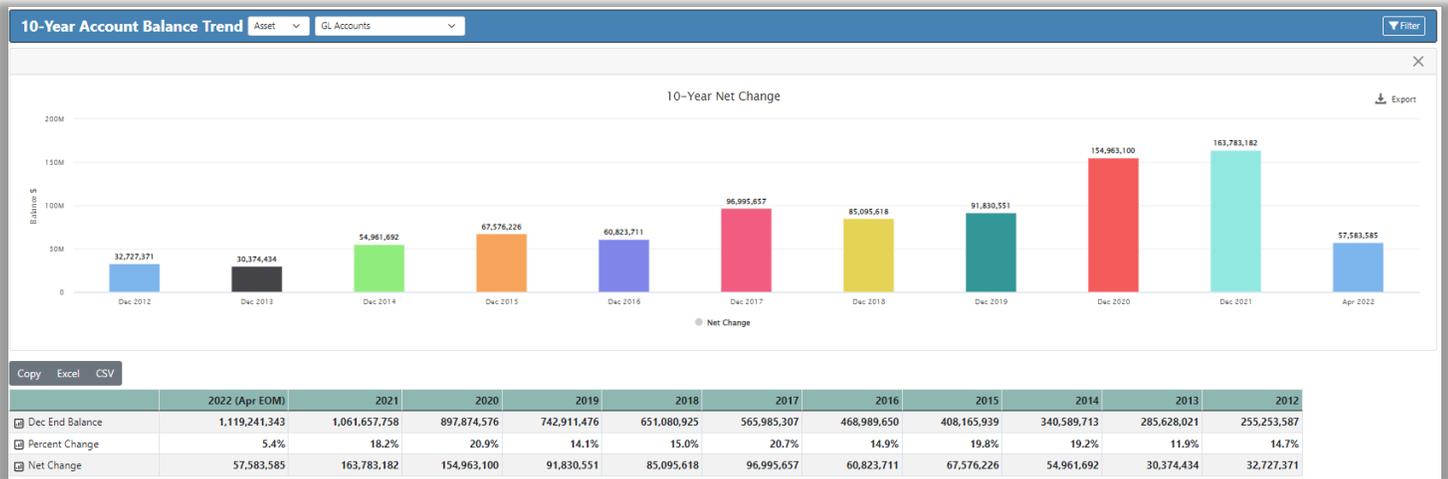
This sleek dashboard got an update with new sortable data columns that show a month-by-month of the previous ten years automatically, showing the complex breakdowns of the change from previous month, the balance, and the change percentage. Select any graphing icon next to the month to view the charting analysis.

10-Year Account Balance Trend												
Filtered: GL Accounts												
	2022 (Apr EOM)	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012	
Dec End Balance	262,909	262,568	229,835	78,040	111,250	8,851,085	3,597,617	2,815,381	2,600,439	1,691,115	1,751,637	
Percent Change	0.1%	14.2%	194.5%	-29.9%	-98.7%	146.0%	27.8%	8.3%	53.8%	-3.5%	4.8%	
Net Change	341	32,733	151,795	-33,210	-8,739,835	5,253,468	782,236	214,942	909,324	-60,522	80,438	

Month	2021			2020			2019			2018			2017			2016		
	Change	Balance	Chg %	Change	Balance	Chg %	Change	Balance	Chg %	Change	Balance	Chg %	Change	Balance	Chg %	Change	Balance	Chg %
January	-12,677	217,157	-5.52%	-3,202	74,837	-4.10%	-1,671	109,578	-1.50%	-2,168,998	6,682,087	-24.51%	72,469	3,670,086	2.01%	79,468	2,894,850	2.82%
February	4,965	222,122	2.29%	-3,212	71,625	-4.29%	-1,045	108,533	-0.95%	201,034	6,883,121	3.01%	79,759	3,749,845	2.17%	314,107	3,208,956	10.85%
March	20,227	242,349	9.11%	-3,246	68,379	-4.53%	-1,067	107,466	-0.98%	375,051	7,258,172	5.45%	-50,000	3,699,845	-1.33%	251,720	3,460,676	7.84%
April	-37,422	204,927	-15.44%	45,301	113,680	66.25%	-75,654	31,812	-70.40%	-446,554	6,811,617	-6.15%	527,016	4,226,861	14.24%	203,294	3,663,969	5.87%
May	-5,064	199,863	-2.47%	8,919	122,598	7.85%	18,752	50,563	58.95%	-6,737,017	74,601	-98.90%	-106,919	4,119,943	-2.53%	380,916	4,044,886	10.40%
June	-5,407	194,456	-2.71%	24,984	147,583	20.38%	-968	49,596	-1.91%	48,022	122,623	64.37%	143,288	4,263,231	3.48%	-157,366	3,887,519	-3.89%
July	16,947	211,403	8.71%	-2,326	145,256	-1.58%	19,332	68,928	38.98%	-822	121,801	-0.67%	4,093,089	8,356,320	96.01%	-43,438	3,844,081	-1.12%
August	-5,110	206,293	-2.42%	-1,880	143,376	-1.29%	-773	68,154	-1.12%	-933	120,869	-0.77%	19,219	8,375,539	0.23%	-25,610	3,818,471	-0.67%
September	-14,722	191,571	-7.14%	-2,142	141,234	-1.49%	-753	67,401	-1.11%	3,040	123,908	2.51%	62,599	8,438,137	0.75%	-16,000	3,802,471	-0.42%
October	43,623	235,194	22.77%	-2,513	138,721	-1.78%	-765	66,636	-1.13%	-1,345	122,563	-1.09%	-180,830	8,257,307	-2.14%	-1,355	3,801,116	-0.04%
November	-6,205	228,990	-2.64%	-2,298	136,424	-1.66%	14,606	81,242	21.92%	-1,344	121,219	-1.10%	2,651	8,259,958	0.03%	-268,884	3,532,232	-7.07%
December	33,578	262,568	14.66%	93,411	229,835	68.47%	-3,203	78,040	-3.94%	-9,969	111,250	-8.22%	591,127	8,851,085	7.16%	65,385	3,597,617	1.85%
Year End	32,733	262,568	12.47%	151,795	229,835	66.05%	-33,210	78,040	-42.56%	-8,739,835	111,250	-7,856.04%	5,253,468	8,851,085	59.35%	782,236	3,597,617	21.74%

10 Year Trends: New Bar Graph On-Demand

A new quick-view bar graph that displays the year-end balance, percent change, or net change is available at the click of a button! Select the graphing icon beside each option to quickly display an exportable bar graph showing the available data.

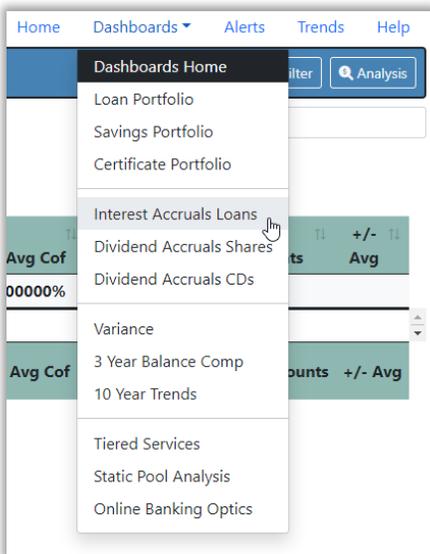


3 Year Balance Comparison: New Quick Analysis Feature

Using the Analysis button on this dashboard will display the 3 year comparison analysis in detail, showing average changes, high and low balances, and quarter by quarter averages.

3-Year Account Balance Comparison Analysis				
Copy Excel CSV Print				
Balance Data	2020	2021	2022	Total
# Months Up	11	9	4	24
# Months Down	1	3	0	4
Average Change	\$13,911,795	\$13,395,598	\$14,397,502	\$13,759,954
Low Balance	\$748,567,439	\$920,034,144	\$1,074,049,335	\$748,567,439
High Balance	\$897,874,576	\$1,062,346,470	\$1,119,241,343	\$1,119,241,343
Averages				
# Months Displayed	12	12	4	28
Avg Monthly Bal	\$835,288,411	\$1,005,024,278	\$1,096,464,275	\$945,343,192
Quarter 1	\$761,327,113	\$946,910,323	\$1,088,871,919	\$932,369,785
Quarter 2	\$838,002,529	\$1,000,419,007	\$373,080,448	\$947,786,564
Quarter 3	\$852,500,034	\$1,015,056,766	\$0	\$933,778,400
Quarter 4	\$889,323,969	\$1,057,711,014	\$0	\$973,517,492

New Navigational Dropdown Menu for Easy Dashboard Access



Sometimes the simple enhancements are the ones that go straight to the top of our favorites list, and this one does just that. We've added a dropdown navigation menu to easily traverse the Dashboards without retuning to the home page each time! Once you've entered a dashboard, simply select the downward arrow and choose to navigate to your next dashboard, or return home.



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