Features and Services Upgrade

Release	Release Audience	Release Date	Publication Date
AB_23.06	All Subscribers	June 25, 2023	June 8, 2023

Exploring the Release with Josh Peacock

Asterisk Intelligence Product Development Manager/Business Development

While our exciting 2022 December release was all about Dashboards, this release is all about Trends!

We've revamped the Trends homepage to display a much cleaner and more data driven look and methodology. We're now giving the numbers, the facts, the business side first at a glance, and letting users determine where they would like to see the visualizations of the data.

We've developed category cards for all of the data point collections; balance data, member data, cash data, and all the rest. Simply click on a category to see an immediate dashboard of the related data points. Additionally, we've made improvements to Learn from a Peer, made setting preferences and favorites easier than ever before, upgraded exporting capabilities, added custom combined branch reporting, and even added a few goodies behind the scenes to make the way we "show our work" in the data math even smoother when applied across the board.

In looking at this release and all of the improvements to Trends, I like to envision users at this control panel, tweaking, reviewing, exploring, and setting preferences to be able to develop a custom, perfectly tailored look into credit union trends and behaviors.

I'm looking forward to seeing you at a training session for this release, so that we can further discuss these exciting new features that are enhancing the Trends experience.

Training and Information Sessions

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

Wednesday, June 14 *@ 3:00 – 4:00 PM ET*

**Wednesday, June 28** *@ 3:00 – 4:00 PM ET*

Register Now

Spotlight on Trends

We're excited to unveil these updates to Trends, check out more below!

A New Trends Home Page

Previously, entering Trends showed trend line graphing in information tiles for the selected trend categories. These tiles gave percentages of change and showed a general trend over the configured period of time.

Old Trends Home Page
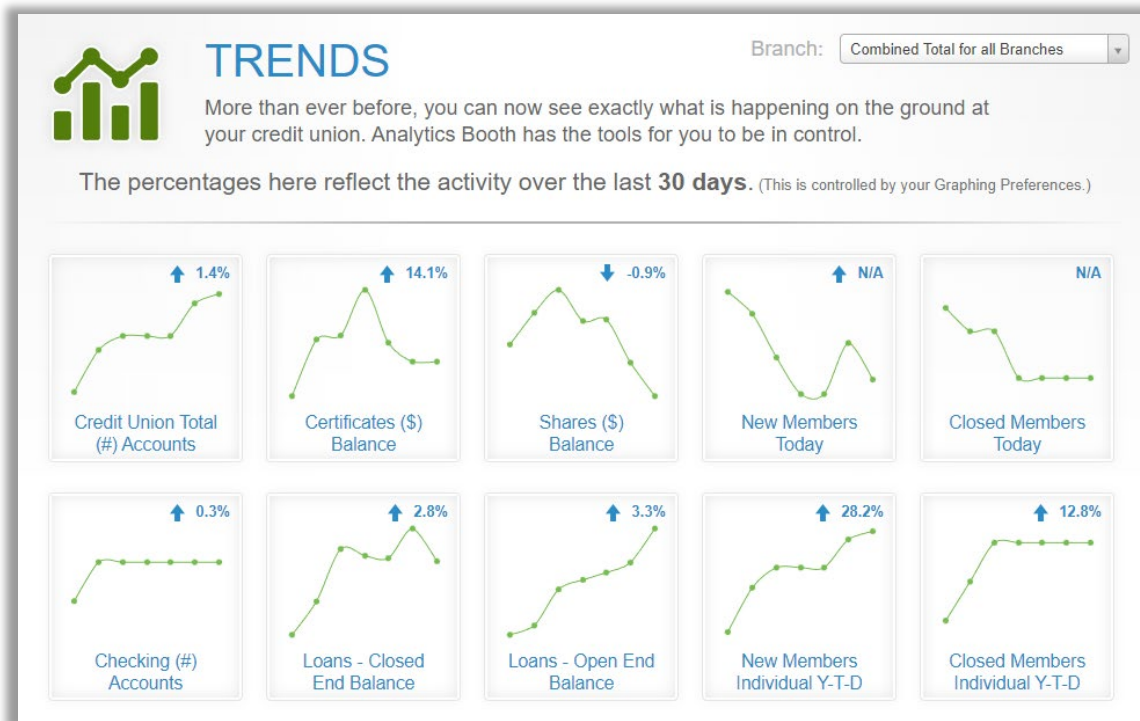
Now, entering the Trends home page shows tiles that put the data up front, by the numbers. We've matched the styling to the Dashboard section, nearly wrapping up our whole site transition to the new scheme and design.

New Trends Home Page
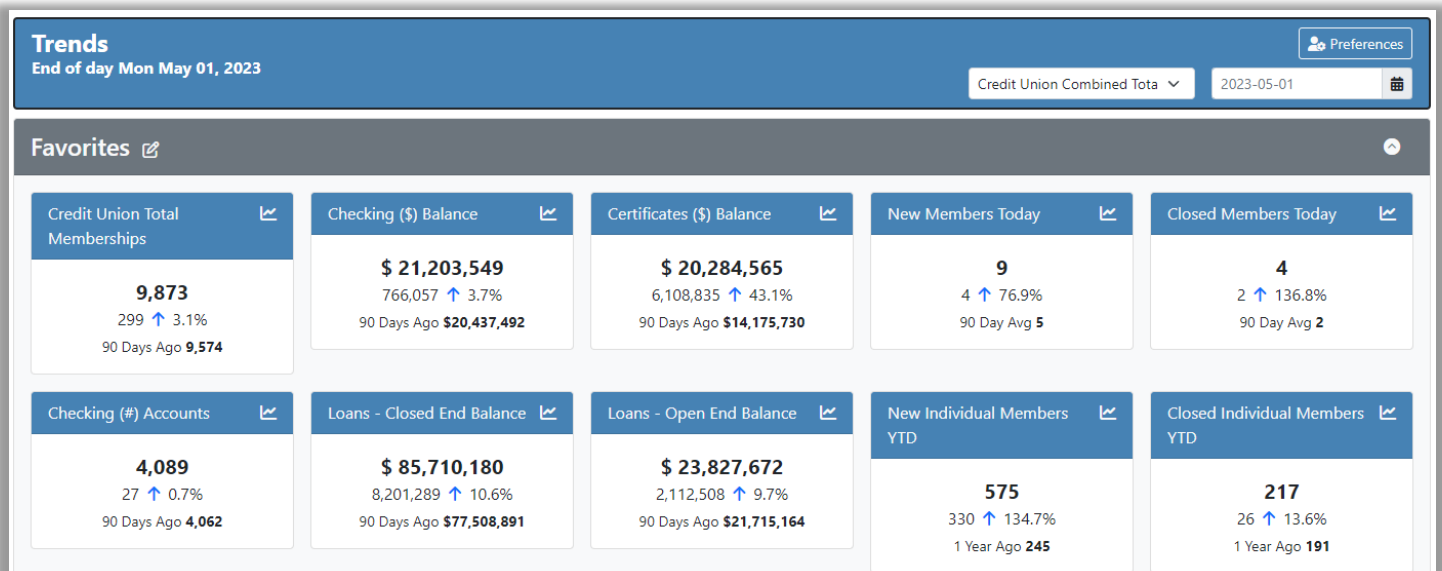
New Data Table to Show All Points

Just like with the Dashboard improvements, we are not only presenting the data in the trend tile, but just under the fold on the screen we're showing the full report of all data points – fully sortable, export ready, and able to be viewed in a trend visual at the click of a button.

Trends Report

Category	Metric	Mon May 01, 2023	Compare	Compare Date	Comp Value	Diff	Diff %
Balance Data	Shares ($) Balance	$ 111,159,818	90 Days Ago	Wed Feb 01, 2023	$117,033,716	$ -5,873,898 ↓	-5%
Cash Data	Vault Cash Total	$ 603,216	90 Days Ago	Wed Feb 01, 2023	$686,475	$ -83,259 ↓	-12.1%
Cash Data	Branch Cash Total	$ 696,597	90 Days Ago	Wed Feb 01, 2023	$765,722	$ -69,125 ↓	-9%
Delinquency Data	Delinquent Bal - 2 - 5 MONTHS DELINQUENT	$ 45,291	3 Month(s) Ago	Wed Feb 01, 2023	$102,955	$ -57,664 ↓	-56%
Delinquency Data	Reportable Delinquent Balance	$ 45,291	3 Month(s) Ago	Wed Feb 01, 2023	$102,955	$ -57,664 ↓	-56%
Transaction Data	Certificates ($) Withdrawals	$ 5,144	90 Day Avg		$44,173	$ -39,029 ↓	-88.4%
Transaction Data	Escrow ($) Withdrawals	$ 736	90 Day Avg		$2,973	$ -2,237 ↓	-75.2%
Delinquency Data	Delinquent Amt - 2 - 5 MONTHS DELINQUENT	$ 8,322	3 Month(s) Ago	Wed Feb 01, 2023	$9,634	$ -1,312 ↓	-13.6%
Balance Data	Shares Average Balance	$ 7,995	90 Days Ago	Wed Feb 01, 2023	$8,613	$ -618 ↓	-7.2%
Transaction Data	Loans - Open End Deposits	154	90 Day Avg		186	-32 ↓	-17%
Delinquency Data	Delinquent Amt - 32 - 60 DAYS DELINQUENT	$ 4,669	3 Month(s) Ago	Wed Feb 01, 2023	$4,685	$ -16 ↓	-0.3%
Transaction Data	Certificates (#) Deposits	9	90 Day Avg		19	-10 ↓	-53.4%
Balance Data	Escrow (#) Accounts	238	90 Days Ago	Wed Feb 01, 2023	241	-3 ↓	-1.2%
Transaction Data	Certificates (#) Withdrawals	2	90 Day Avg		4	-2 ↓	-48.6%
Transaction Data	Escrow (#) Withdrawals	1	90 Day Avg		2	-1 ↓	-46.4%
In-Process Data	Loans Opened	7	90 Day Avg		8	-1 ↓	-7.1%
In-Process Data	Applications Denied	2	90 Day Avg		2	0 ↑	16.9%

Follow the Breadcrumbs: Where You Are and Where You've Been

Called 'breadcrumbs' in the web programing world, this directly shows the path you took to access the screen you're on, and the handy links allow you to quickly jump back to the previous category, or even back to the home page.

Breadcrumbs

New Way to Set Preferences for Graphing and Display

Instead of selecting within each graph and using a pop-up to adjust preferences, now simply select the Preferences button to access a screen to set preferences for all graphs (but don't worry, you can still manually adjust for each graph).

Old Preferences Popup
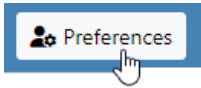
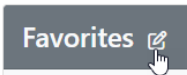**Preferences** Now, simply click Preferences and set your defaults for charts and reports.

New Trends Default Settings (Preferences)

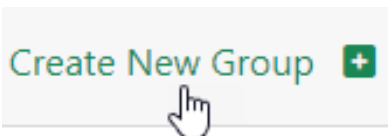**Trends Default Settings for**

Trends / Preferences

General settings:

How many days would you like the **report** to compare? | 30 days | 60 days | 90 days | 120 days | 180 days |

Save

Trend Chart Settings

Default time period for **trend charts** (x-axis) to show? | 30 days | 60 days | 90 days | 120 days | 180 days | 1 Year | Year to Date |

What days of the week would you like the initial charts to show?
Monday   Tuesday   Wednesday   Thursday   Friday   Saturday   Sunday

Save

Custom Branch Groups   Create New Group ➕

An Easier Way to Set Favorites

Favorites ✎ Select the edit icon next to the Favorites button, and access the screen where you can drag and drop Trend data points to configure or reorganize your preferred Trend tiles on the home page.

Trend Tile Favorites Screen

Trend data points	My favorites
Credit Union Total Number of Loans	Credit Union Total Memberships
Total Loans ($) Balance	Checking ($) Balance
Total Savings (#) Accounts	Certificates ($) Balance
Total Savings ($) Balance	New Members Today
Credit Union Total (#) SSN	Closed Members Today
Certificates (#) Accounts	Checking (#) Accounts
Certificates Average Balance	Loans - Closed End Balance
Loans - Closed End (#) Accounts	Loans - Open End Balance
Loans - Closed End Average Balance	New Individual Members YTD
Loans - Open End Accounts	Closed Individual Members YTD
Loans - Open End Balance Average	
Checking Average Balance	
Shares (#) Accounts	
Shares Average Balance	
Shares ($) Balance	

Drag and drop ten data points you would like to view as your favorites. They may be arranged in any order and will display in the favorites section of the trends page from left to right starting with the top favorite in the list and ending with the bottom favorite.

Search data points: _____

Refresh Set favorites to last saved

Save

NEW! Multi-Branch Reporting (Customize Your Own Branch Groups)

Create New Group ➕ New in this release is the ability to create custom branch groups to use to quickly display reporting in any Trend for that specific group! Once you've accessed the Preferences screen, use the *Create New Group* button to begin combining customized groups of branches.

Use this screen to name the branch group, select which branches should be included, and select the visibility – groups created for "Credit Union" can be used by any subscriber at your CU, and the "Only You" setting creates a personal, non-visible group for use in reporting and charting.

Create a Branch Group Screen

Then, while creating charts for Trends, use the drop down menu to select the default combined total, a single branch, or your custom branch groups to display charts for only those branches.

Selecting a Branch or Group for Reporting

A Full Restructure of the Learn From a Peer Analysis Setup

We've completely revamped the Peer Analysis setup. Previously, selecting Peers/Manage Peers within the Preferences brought you to the manage peers screen.

Old Peer Group Settings Screen

Now, use the menu access to select Learn from a Peer and display the new Peer Groups setup screen. Columns of peers are sortable by state (a newly listed data point for credit union peers!), assets, and members. The new search allows you to pinpoint only CUs with specific criteria for your peer group (such as, all credit unions who share your market in Indiana, for an example). After deciding who will be in the primary and secondary groups, click the buttons to add them immediately. Don't forget to save!

Learn From Peers Setup Screen

Chart a Third Data Point in Balance Data Categories

When creating a chart, Balance Data categories are now able to chart a third data point. This includes count, balance, and average data for your shares, checking, loans, certificates, and escrow accounts. This third data point makes a robust visual snapshot of your data over time, in a way that is sure to impress your board!

Charting Three Data Points
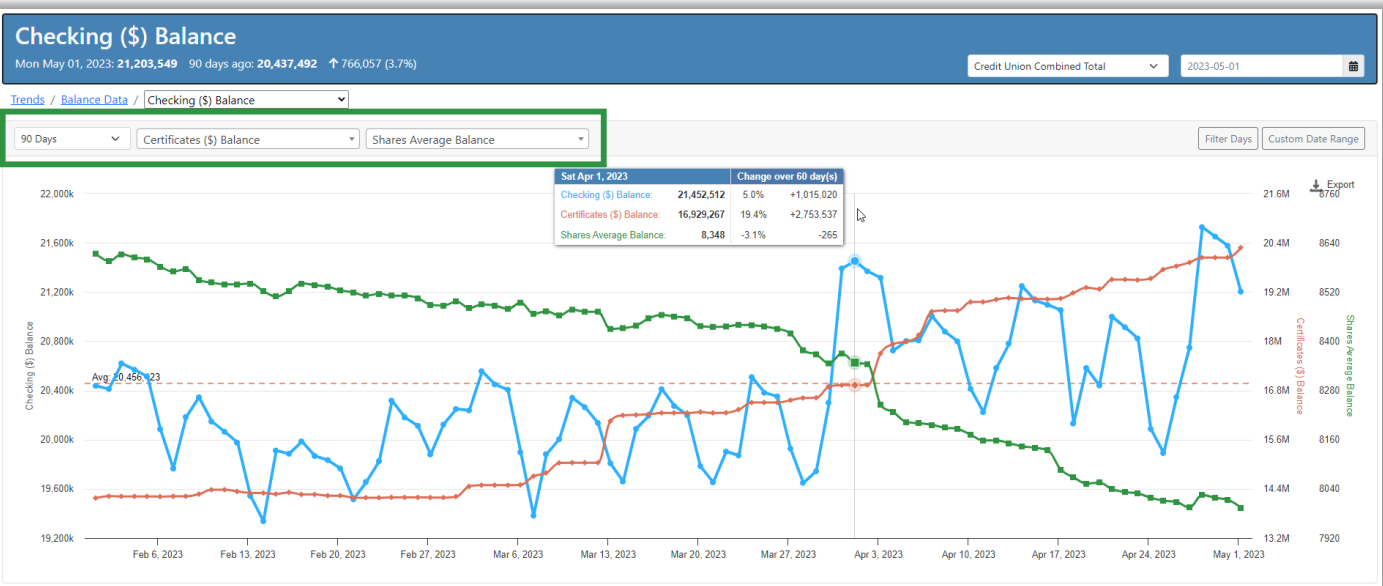
Supporting Data Shows Each Data Point in Detail

Scroll down just a little further when viewing a Trend and you'll see the supporting data points that comprise the graph above. This data table is, of course, sortable and exportable!
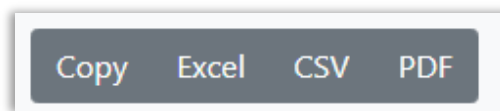
Trend Graph and Supporting Data
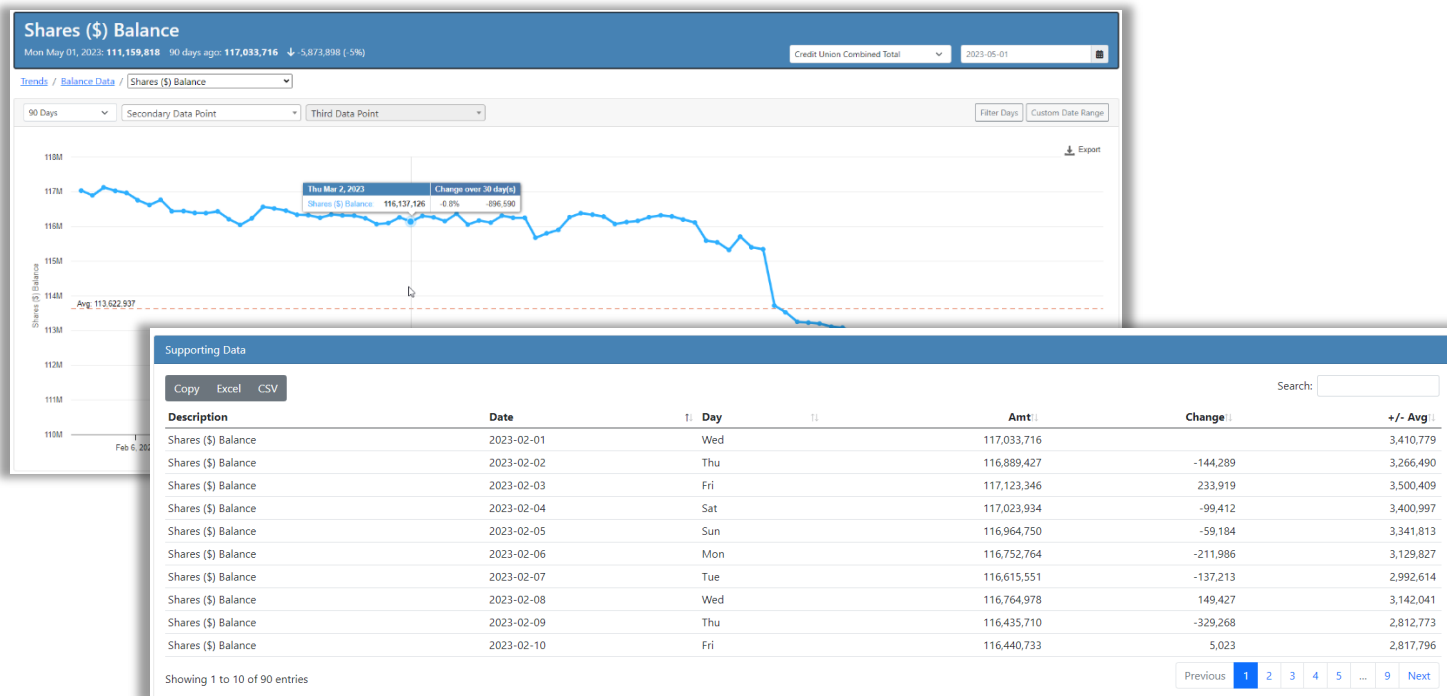
Category Level Reporting with New Category Cards

We love the new category level reporting; simply select a category (balance, member, cash, delinquency, transaction, and member YTD data) from the data chart on the trends home page to view a running dashboard of data trends!

Balance Data Category Cards

Exporting Charts (PNG, JPEG, PDF) + Exporting Data Tables (Excel)

We've upped our game on exportable data. Now, use the tool bar in any reporting screen to pull down the data into your clipboard (copy), a spreadsheet (Excel), a comma delimited file (CSV), or a PDF.

When viewing a VAT trendline, chart, or graph, use the Export button to select from the various options to neatly save your hard work for posterity (and again, to wow them at your next presentation or board meeting!)
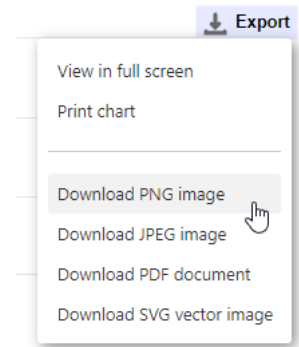
Improved Logic on Over 40 Data Points

We are getting away from the one-size fits all approach to measuring performance. For example, when looking at the *Number of Members* over time, it makes sense to take the most recent value and subtract a previous date's value to calculate growth or decline. However, that does not hold true for other metrics like *Number of Loans Opened*, where we compare our most recent value to how the credit union did on a specific day six months ago. We think a better way is to use logic based on the key metric you are evaluating and compare the credit union's most recent value to an average over that same time frame.

Upgraded Powerlines and Web Version CU*BASE Links

Returning in this release are the Powerlines and Web Version links in CU*BASE! Previously, these links were disabled as configuration changes were required. Now that all pieces are in sync, we're thrilled to reintroduce you to a perk and benefit of being an Analytics Booth subscriber – instant access to your credit union's data toolbox at the click of a button. As an added improvement, once you've selected the Powerline/Web Version, you're no longer locked in to viewing only that data, and you can then feel free to roam your own Analytics Booth!

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