

Release	Release Audience	Release Date	Publication Date
AB_23.12	All Subscribers	December 10, 2023	November 21, 2023

Exploring the Release with Josh Peacock

Asterisk Intelligence Product Development Manager/Business Development



While our exciting [2022 December release](#) was all about Dashboards, and our [release this June](#) was centered on Trends, I'm happy to report that the star of this release is Alerts!

After our major renovations to the Dashboards and the Trends (including the much-loved charting enhancements), it made perfect sense to return to the Alerts for a facelift and an update. While the Alerts umbrella isn't as interactive and dynamic as other areas, creating your custom Alerts and reporting is an integral and valuable

area of Analytics Booth, and can be the real driver of your user experience. The Alerts feature can be a great way to save on labor costs by injecting automation into your credit union. We're excited to give some love to an area that hasn't seen any substantial updates since its launch – which if you can believe, was eight years ago now!

We believe we've made some great updates in this release, including changes to the reports and alerts workflow, member management, updates to filters and preferences, and more modernization on the landing pages for all three areas. We hope to see you in a training session soon to explore more about these key enhancements and features.

Training and Information Sessions

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

Training #1 (Pre-Release)

Wednesday, December 6 @ 3:00 – 4:00 PM ET

[Register Here](#)

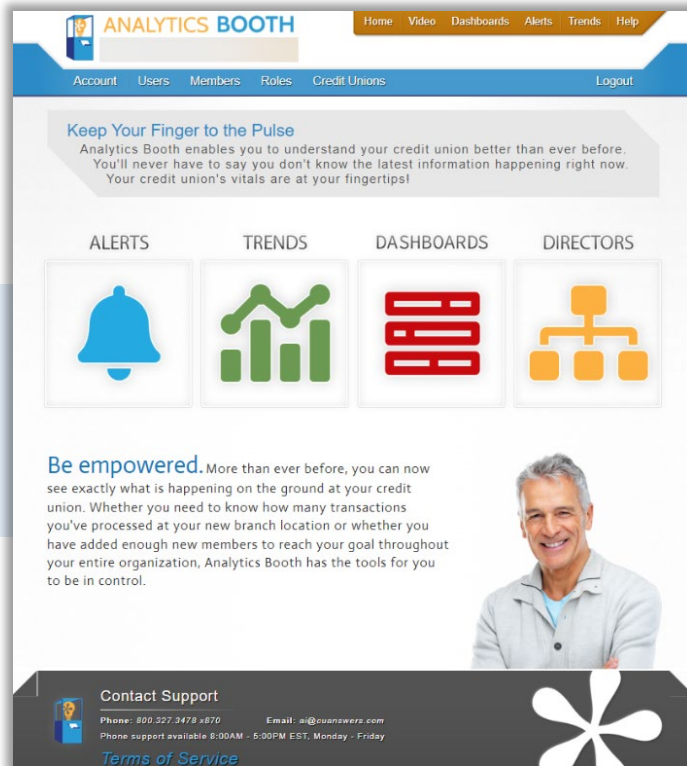
Training #2 (Post-Release)

Wednesday, December 13 @ 3:00 – 4:00 PM ET

[Register Here](#)

First Things First: The New Look!

Before we dive into the functional enhancements, let's get comfortable with the new landing pages and designs.

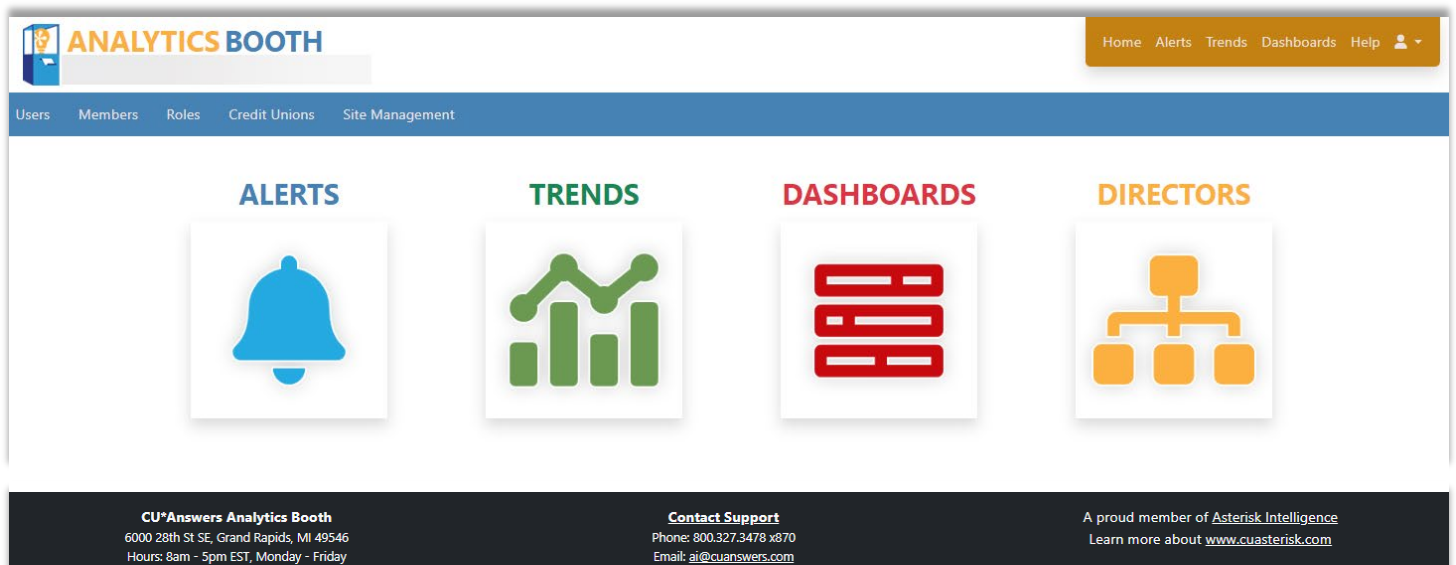


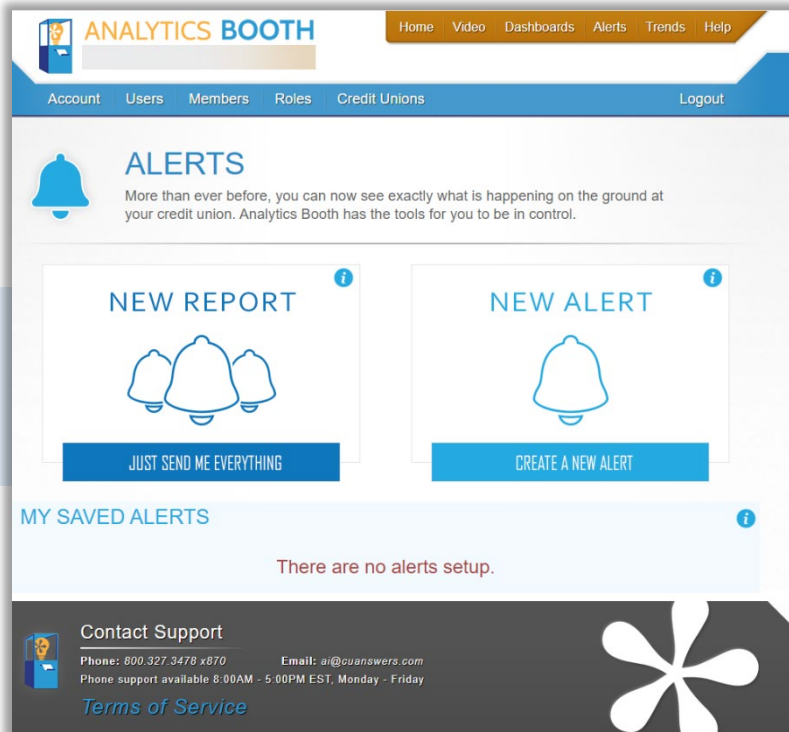
Starting at the Homepage...

We've bid farewell to our long-standing homepage in this release, opting for a cleaner and more business forward approach. Gone will be our friend at the bottom; who as a piece of oft-asked trivia is NOT a staff member in the CU*Asterisk network.

...a Fresh Design Awaits

We've tightened up the look and feel, giving you access to the features you need, without a lot of extra content to get in the way. Now have the confidence to get in, get your data, and get back to running the business.



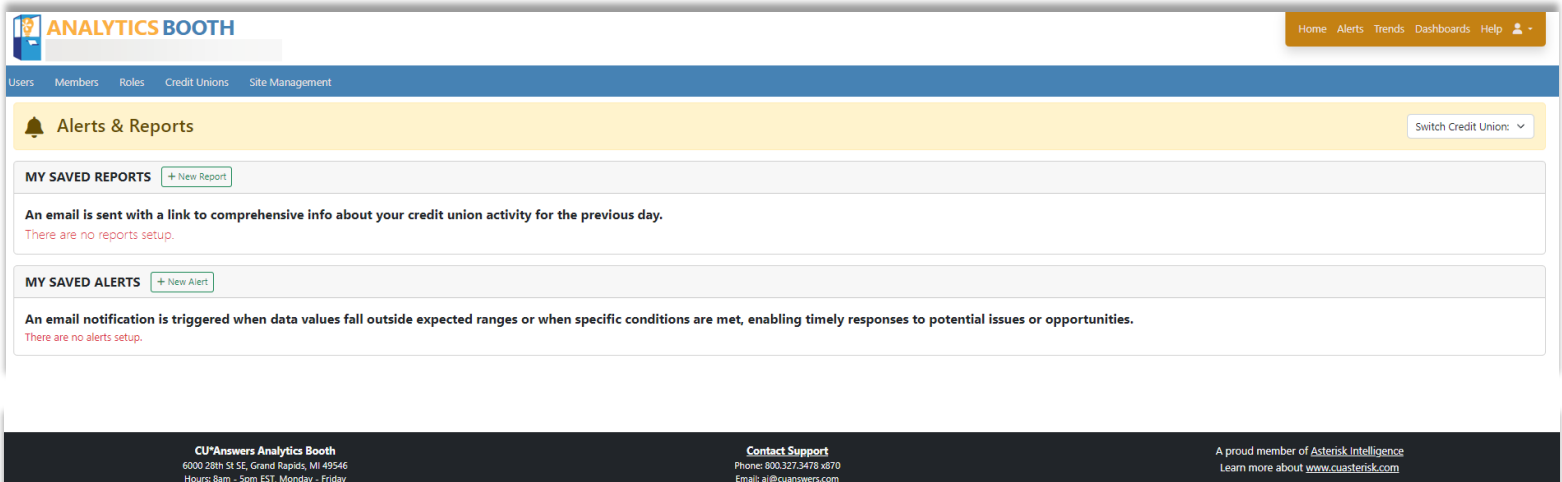


An Update to the Alerts Page...

We've expanded the sleek look of the homepage to the Alerts landing page as well, tightening up the look and functionality to make way for a new workflow (more on that below!)

...Makes Way for a New Workflow

While the updates to the workflow center around configuration and setup, we've updated the Alerts & Reports landing page to support the new style! As you'll read in the Alerts section, these workflow changes don't impact how the tests are performed, or how the alert emails are delivered.



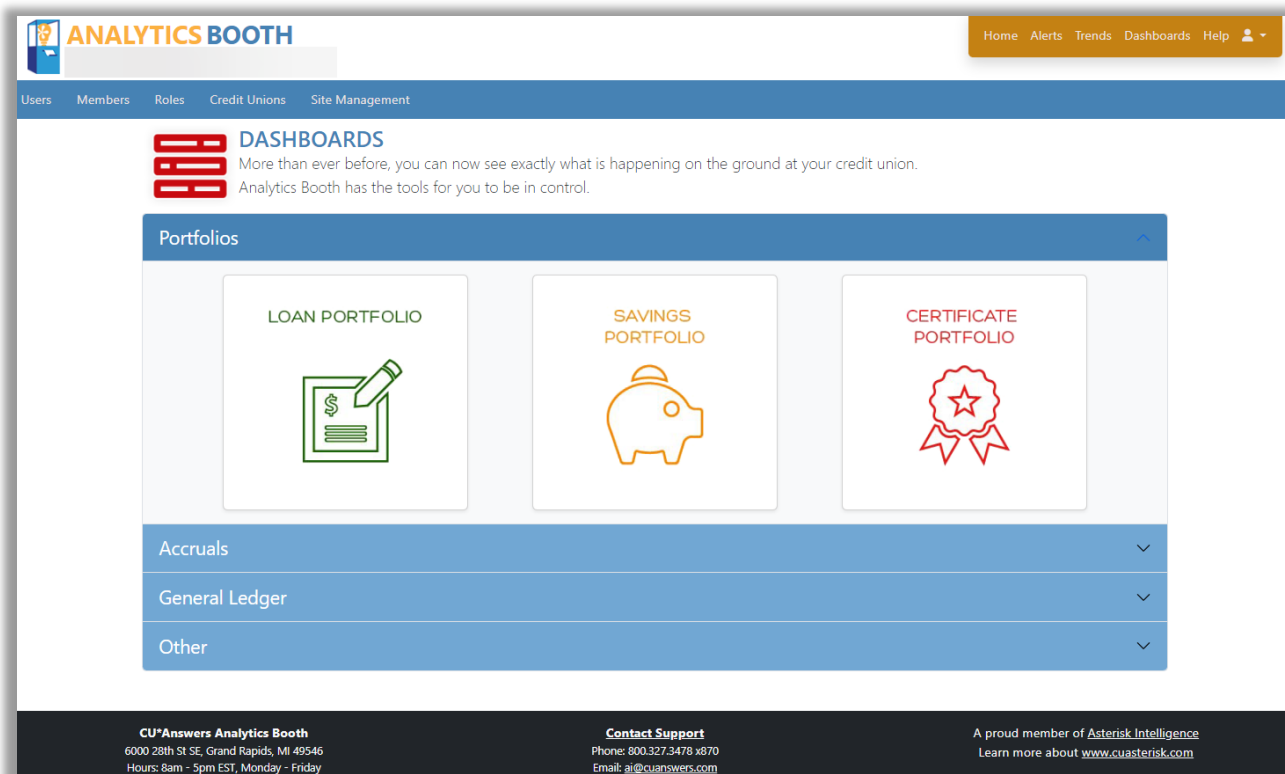


Matching Styles for Dashboards...

We've applied the same new style to the Dashboard landing page as well, to ensure homogeneity across your user platform.

...Puts It All Together Now

Sleek new drop down sections and matching design are displayed in the new Dashboards landing page.



Spotlight on Reports & Alerts

A New Reports & Alerts Workflow: a Simple Step-Through Process

As mentioned above, we've updated the workflow to make Creating a new Report or Alert easier than ever. In this update, the setup process for both a new report or alert have been simplified into four steps that will walk you through all desired criteria, data points, and distribution.

Old Report & Alert Workflow

Create a New Report

Combined Totals

Report Frequency
Weekly

For the Following Branches:

Send this Report to me and:

Create a New Alert

Send an Alert for:
Total Loans (#) Accounts

If it:
Changes by (+/-)

This amount:

Compared to:
One day ago

For the Following Branches:

Send this Alert to me and:

New Report & Alert Workflow

ANALYTICS BOOTH

Home Dashboards Alerts Trends Help

Users Members Roles Credit Unions Site Management

Alerts / New Alert / Criteria

Create A New Alert

An email is dispatched whenever user-defined criteria align with credit union activity from the preceding day.

Step 1 - Select Data Point Step 2 - Define Criteria Step 3 - Distribution Step 4 - Schedule

Trend Category
Member Data

What data point would you like to set criteria for?
New Members Today

Enter desired criteria and select "Next" to get to the next step.

First, enter your desired criteria and select "Next" to get to the next step.

ANALYTICS BOOTH

Home Dashboards Alerts Trends Help

Users Members Roles Credit Unions Site Management

Alerts / Create Report

Create A New Report

An email is sent with a link to comprehensive info about your credit union activity for the previous day.

Step 1 - Frequency Step 2 - Branches Step 3 - Distribution Step 4 - Schedule

Frequency
How often would you like to receive the report email?
Daily

Select the day(s) you would like to "receive" the email.
Example: If you pick Monday you will get an email on Monday with the end of day summary from Sunday!

☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday ☐ Sunday

Reports & Alerts follow similar workflow.

Fine Tune Your Data

How often would you like your report? The new workflow makes setting up your reports easier than ever. Analytics Booth gives you the option for daily or monthly reports. In the example below, the user has selected all months.

The screenshot shows the 'ANALYTICS BOOTH' interface. The top navigation bar includes 'Home', 'Alerts', 'Trends', 'Dashboards', and 'Help'. Below this is a secondary navigation bar with 'Users', 'Members', 'Roles', 'Credit Unions', and 'Site Management'. The main content area is titled 'Alerts / Create Report' and 'Create A New Report - [redacted]'. A sub-header states: 'An email is sent with a link to comprehensive info about your credit union activity for the previous day.' Below this is a progress bar with four steps: 'Step 1 - Frequency' (active), 'Step 2 - Branches', 'Step 3 - Distribution', and 'Step 4 - Schedule'. The 'Frequency' section asks 'How often would you like to receive the report email?' with a dropdown menu set to 'Monthly'. It then asks 'Pick the month(s) that you would like to see in the report!' with an example: 'Example: If you pick January you will receive an email on February 1 with data compiled the last day of January.' Below this are twelve toggle switches for each month of the year, all of which are turned on. A 'Next' button is located at the bottom right.

Want the data on all credit union branches? Select the “Consolidated Report” to include all branches, or fine tune your report by selecting which branches you want in the report under “Branch Totals.”

The screenshot shows the 'ANALYTICS BOOTH' interface, specifically the 'Create A New Report' form at Step 2: Branches. The top navigation bar is the same as in the previous screenshot. The secondary navigation bar is also the same. The main content area is titled 'Alerts / Create Report' and 'Create A New Report - [redacted]'. A sub-header states: 'An email is sent with a link to comprehensive info about your credit union activity for the previous day.' Below this is a progress bar with four steps: 'Step 1 - Frequency', 'Step 2 - Branches' (active), 'Step 3 - Distribution', and 'Step 4 - Schedule'. The 'Branches' section is titled 'Report On:' and has a toggle switch for 'Consolidated Report - Credit Union Totals (all branches)' which is turned on. Below this is the 'Branch Totals:' section with a link to 'Select All'. There are three columns of toggle switches, each with three switches, all of which are turned off. A 'Next' button is located at the bottom right.

Analytics Booth will automatically send the report to the user who created it, but you can add more recipients in the Distribution step. Simply type in an email address and select “Add.” Add as many email addresses as you desire, then select “Next” for the final steps.

Create A New Report - [redacted]

An email is sent with a link to comprehensive info about your credit union activity for the previous day.

Step 1 - Frequency

Step 2 - Branches

Step 3 - Distribution

Step 4 - Schedule

Distribution

Would you like to send this report to any additional email addresses? (not required)
note: an opt-in request will be sent to email and must be confirmed before any reports are distributed.

Next

Confirming and scheduling your report is the final step. Review all criteria and put Analytics Booth to work.

Create A New Report - [redacted]

An email is sent with a link to comprehensive info about your credit union activity for the previous day.

Step 1 - Frequency

Step 2 - Branches

Step 3 - Distribution

Step 4 - Schedule

Confirm and Schedule

You want to receive a report: Monthly

For the following months: January, February, March, April, May, June, July, August, October, November * will email 1st day of following month

The report will summarize data for: Credit Union Total

Distribute the report to: [redacted] john@ [redacted]

Save and Schedule

Less Guessing, More Precision

The new Alert workflow is designed to make your life easier. Instead of putting in a random number and waiting to see if you start receiving alerts or not, you can simply enter a comparison amount (or percentage) and Analytics Booth will show you how many alert emails you would have received over the last 30 days. In the example below, we put the amount of \$1,000,000 (omit commas in the “\$” field) and hit the “Evaluate Criteria” button.

You can now view the comparison value, percent change, and amount change for YTD and 1 Year timeframes. These new report timeframes allow you to quickly view the YTD and 1-year comparison data for any of our nearly 100 trend data points in the Trends Report.

In the Trends Report below, you can see the most recent data is now being compared to data from 1 year (365 days) ago to see the credit union’s performance:

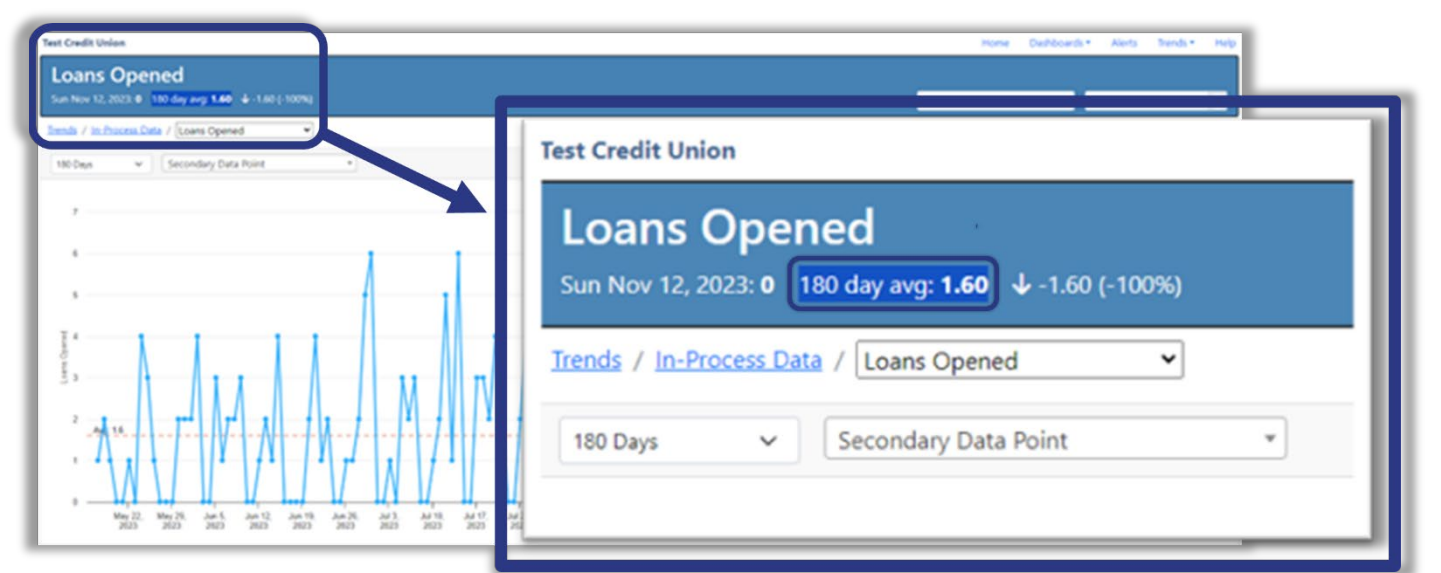
Trends Report:								
Copy Excel CSV PDF			Search: <input type="text"/>					
Category	Metric	Tue Nov 14, 2023	Compare	Compare Date	Comp Value	Diff	Diff %	
Balance Data	Certificates (#) Accounts	6,209	365 Days Ago	Tue Nov 15, 2022	4,135	2,074 ↑	50.2%	
Balance Data	Certificates Average Balance	\$ 39,498	365 Days Ago	Tue Nov 15, 2022	\$43,040	\$-3,542 ↓	-8.2%	
Balance Data	Certificates (\$) Balance	\$ 245,240,590	365 Days Ago	Tue Nov 15, 2022	\$177,972,301	\$67,268,289 ↑	37.8%	

Improved Average Accuracy

Have you ever wondered what the average number of loans opened per day over a certain period is? Do you want your averages to be more accurate? If so, this exciting new update is for you.

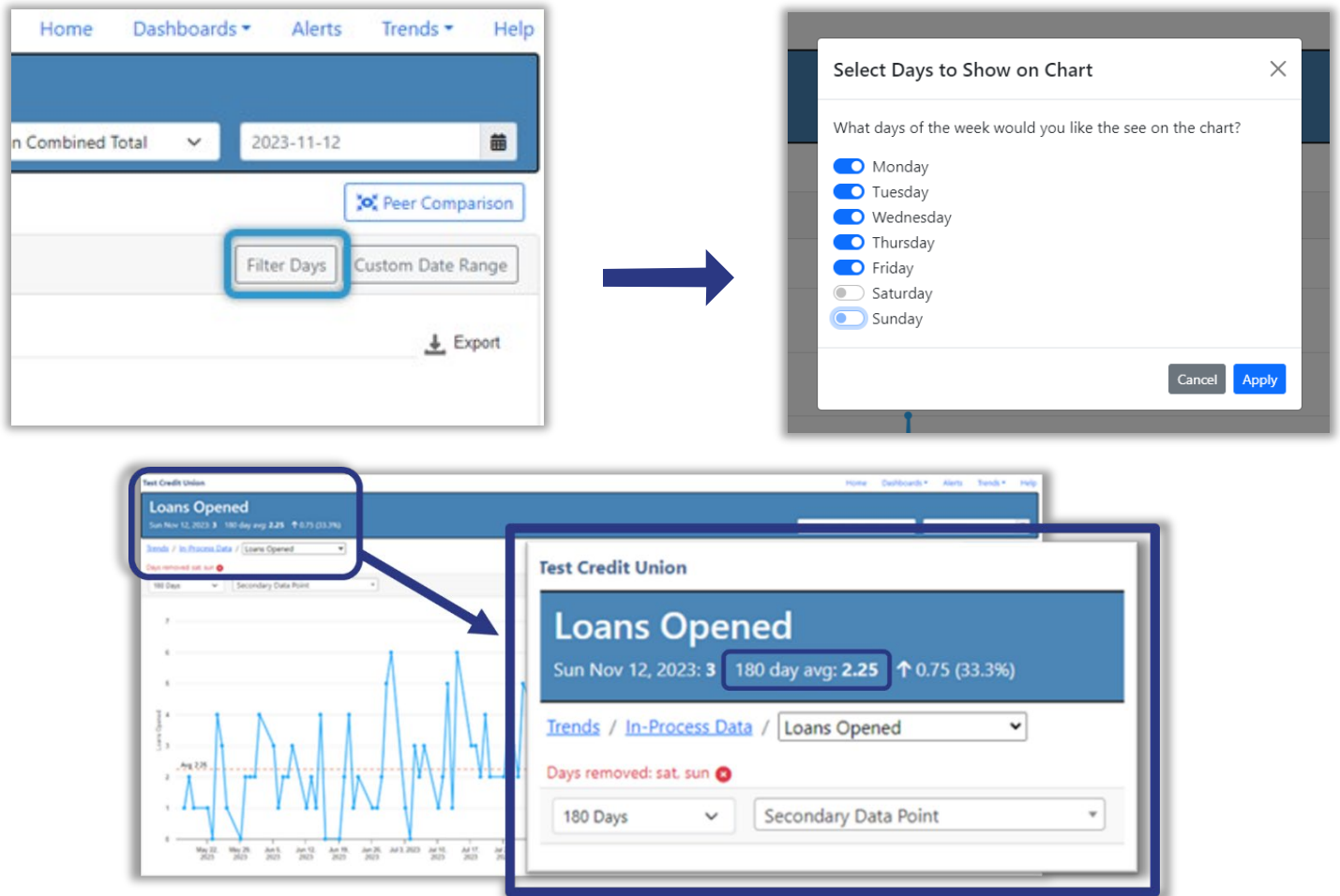
We’re happy to announce the averages on your Trends charts now reflect the days of the week you filter. The Filter Days button makes it easier than ever to select the days of the week to include on your chart, and now the chart average also accurately reflects this filtered data. Want to check the average performance for a specific day of the week? Simply uncheck all days except the one you’re focusing on and view the new trend chart and correlated average. With this new update, you can filter out Sundays, or weekends, and now get a more precise average reflecting only the days you selected. This update will be the most useful for generating more accurate averages on data points whose changes are dependent on your credit union being open, such as loans opened per day.

Before this release, using the Filter Days button would not change the average to reflect only the data from the days selected. Let’s look closer at this new change. Below is an example of Loans Opened over a 6-month period without any days filtered:



You can see the 6-month average is 1.6 loans opened per day.

Now, let's use the filter days button to filter out the weekend:

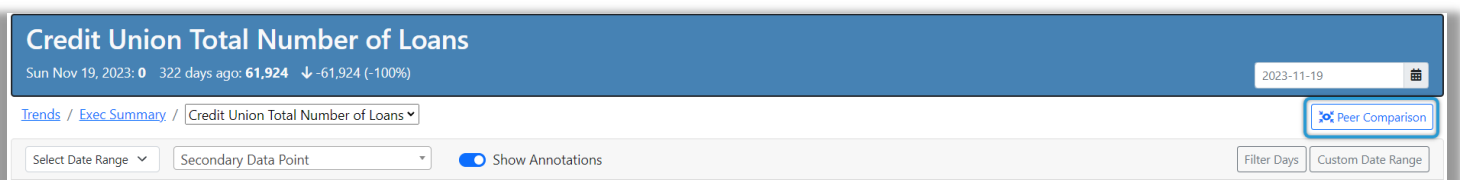


The average over this 6-month period ignores Saturdays and Sundays, giving you a better idea of your loan closure rate per day. In this case, we went from 1.6 loans opened per day when including all days of the week to 2.25 when excluding weekends. This increase of 0.65 doesn't seem like much on the surface; however, it represents a 40% increase compared to what you may have otherwise seen and reported previously.

Filtering out non-business days, like Sunday and in some cases Saturday, will now give you more accurate averages than before for certain data points. Keep in mind, you may not want to drop weekends from all the data points you're tracking. For example, it won't make as much sense to filter days for certificate balances as it does with new members per day or loans opened per day.

Peer Cleanup

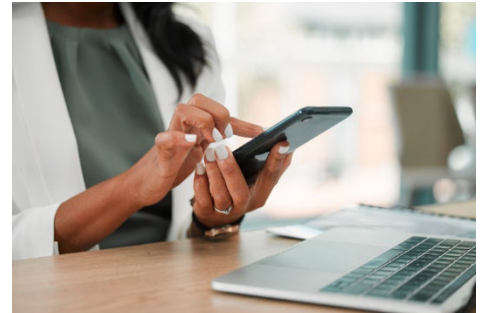
There were some minor changes made to the peer analysis area of Trends. You can now do peer comparison on executive summary data points. These changes will be covered in more detail in the release training sessions.



Additional Features and Updates

Features in the Palm of your Hand

Analytics Booth has never been marketed as a service to be used on a mobile device such as a smart phone, largely because of the amount of data that is displayed. Simply put, there is not enough visual real estate on these types of devices. Since we live in a mobile world these days, our team decided it is time to bring you some of the features right to the palm of your hand. We encourage you to attend one of the two Analytics Booth webinars to learn more about these exciting improvements.



Member Management

We've upgraded the member administration site, making it easier to add, edit, and remove permissions and users from your Analytics Booth site. In this release, we've introduced sorting features to make it easier to identify active and dormant users, as well as update passwords. This enhancement will be exciting for our credit unions who are managing many users!

Old Member Management Site vs. Updated Member Management Site

This screenshot shows the 'Old Member Management Site'. It features a top navigation bar with links like Home, Video, Dashboards, Alerts, Trends, and Help. Below this is a secondary bar with Account, Users, Members, Roles, and Credit Unions. The main content area is titled 'FCU Member Management' and contains a table with columns for Name, Member Groups, Email, Last Login, and Last Failed Login. The table lists several users, mostly 'Authorized User' and 'Credit Union Admin', with their respective login and failed login timestamps. A 'Done' button is at the bottom left, and an 'Add Member' button is at the top right.

Name	Member Groups	Email	Last Login	Last Failed Login
	Authorized User		2023-03-07 14:09:39	2019-11-13 08:23:32
	Authorized User, Credit Union Admin		2019-06-20 10:35:52	
	Authorized User		2018-03-23 17:36:03	
	Authorized User		2019-08-21 18:03:13	2019-08-20 15:03:32
	Authorized User		2022-04-19 10:41:42	2019-07-17 15:26:08
	Authorized User		2018-03-14 15:36:06	
	Authorized User		0000-00-00 00:00:00	

This screenshot shows the 'Updated Member Management Site', specifically the 'Credit Union User Management' page. It has a more modern layout with a top navigation bar and a secondary bar with links like Users, Members, Roles, Credit Unions, and Site Management. The main content area is titled 'Credit Union User Management' and includes a search bar, a table with columns for Last Name, First Name, Email, Role, and Last Login, and a 'Showing 1 to 7 of 7 entries' indicator. The table lists several users with their roles and last login times, and each row has 'reset password' and 'Edit' buttons. A 'Previous' and 'Next' button are at the bottom right.

Last Name	First Name	Email	Role	Last Login
			Authorized User	Mon Nov 13, 2023 (7)
			Credit Union Admin	Tue Dec 28, 2021 (692)
			Credit Union Admin	Mon Sep 14, 2020 (1,162)
			Credit Union Admin	Tue Dec 08, 2020 (1,077)
			Authorized User	Wed Feb 03, 2021 (1,020)
			Guest	Thu Dec 09, 2021 (711)
			Credit Union Admin	Tue Oct 13, 2020 (1,133)



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