

DIRECTORY OF RESOURCES

2018 Development - Asterisk Intelligence

This booklet is a menu of informational resources developed by Asterisk Intelligence. A range of topics are included - products, services, educational events, tools, and guidebooks.

Documents noted with an orange arrow ➤ can be found within your packet of resources for the CU*Answers 2018 Leadership Conference.

Take a moment to review the other resources in this book
- Do other topics catch your eye? Visit the Asterisk Intelligence vendor table to pick up a hard copy of the document and talk to someone on the Asterisk Intelligence team.

Or, find electronic versions of these documents at cuanswers.com/asterisk-intelligence

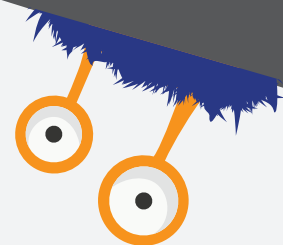


Who is Asterisk Intelligence?

Flyer - 1 page



CONTACT ASTERISK INTELLIGENCE
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Be a Data Monster

New/Closed/All Memberships Dashboard

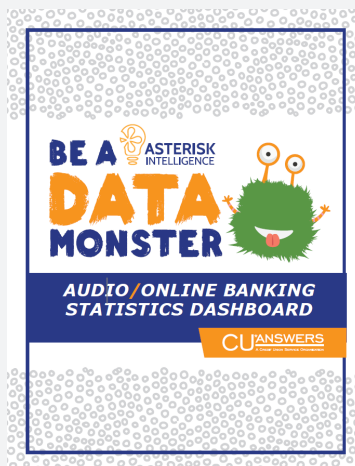
Booklet - 8-12 pages



Be a Data Monster

Audio/Online Banking Stats Dashboard

Booklet - 8-12 pages



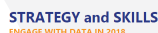
Be a Data Monster

Credit Score History Dashboard

Booklet - 8-12 pages



Flyer - 1 page



Flyer - 1 page

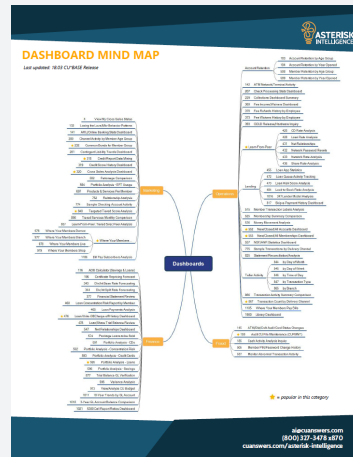


Flyer - 1 page



Dashboards Mind Map

Flyer - 1 page



Dashboards - 2018 Boot Camp Favorites!

Booklet - 12 pages

Data Boot Camp

As some of the most active data consumers in our network, the Boot Camp participants provide a special vision for how such of these tools can be useful. Ask, See, Act, Profit (ASAP) is the foundation of data analysis and these dashboards are some of our best.

Keegan Daniel
Vice President Professional Services
CUAnswers

Data Analytics

2018 Data Bootcamp - Our Favorite Dashboards

The booklet features screenshots of various data analytics dashboards, including a bar chart showing 'Applications by State' and a line chart showing 'Applications by State'.

Tool 200

Channel Activity by Member Age Group

What's the story?
Channel activity is a key indicator of member engagement. This dashboard provides a comprehensive view of channel activity across all member age groups.

Data Expert for DTVs
Looking to perform your own custom analysis? Use the report feature to create a dashboard for your organization's data.

Building a Team
Optimization of this dashboard and its components will help members using the Member Connect tool. Not all members are created equal. Identify members who are most likely to engage with your organization's services and tailor your approach accordingly.

What is the data best use?
This dashboard is designed to help you understand member behavior and identify opportunities for growth. It provides a clear view of member activity across all age groups and allows you to drill down into specific data points.

Technical Score Card

| Category | Score |
|-----------------------|-------|
| Dashboard Reliability | 100% |
| Dashboard Performance | 100% |
| Dashboard Security | 100% |
| Dashboard Usability | 100% |
| Dashboard Integration | 100% |

Asterisk Intelligence Pillar

The pillar consists of four segments: **Trust**, **Control**, **Insight**, and **Impact**.

Data Warehouse - Coming Soon 2018

Flyer - 1 page

CREDIT UNION DATA WAREHOUSE

COMING SOON

What is a Data Warehouse?
A central repository of data from various sources, used for reporting and data analysis. It is a key component of a data management strategy.

Your Personal Data Silo
Get ready to open your credit union's personal data warehouse environment, thoughtfully designed to support strategies surrounding data collection, retention, and analysis. All within the core processes of CUAnswers.

Unlimited Possibility!
Wondering what you'll put into this data warehouse? We've thought of a few excellent ideas. What else do you have in mind?

1. A SEC profile with details of that employer to match against the SEC on record for your member.
2. Results from an external member survey campaign.
3. Neighborhood or geographic-specific details based on ZIP codes, mapped to your member's home address.
4. Open/Close reports from your 3rd party email process.
5. Data tables you created in Query that you wish to keep longer than current database rules allow. (Remember, the CUAnswers environment only stores tables for a short time!)
6. Anything you can dream up!

Pricing
Tailored to YOU - Pay per gigabyte of open record

Control the Asterisk Intelligence team at CUAnswers for more information on the data warehouse offering!

HAVE A QUESTION?
Contact us today!
6000 18th Street SE, Grand Rapids, MI 49506
800.337.3478 or info@asteriskintelligence.com

Asterisk Intelligence

Custom DEX (Data EXchange)

Flyer - 1 page

CUSTOM DEX - Data EXchange
AUTOMATE A DATA FEED
Automate the transfer of data between the core database with daily transfers for use in your external data warehouse

CUSTOM DEX

For External Data Warehouses

Every credit union already has direct access to member and processing data inside the core. But anyone with an external data warehouse already in play for consolidating preflows that ETL - extract, transform, and load - can be a chore.

DEX provides a solution for automating these processes and operates with daily updates to the data set in your warehouse.

Get It Started

You'll work with the Asterisk Intelligence and CUF/Answers Programming teams to launch your custom DEX. First, decide which package your credit union will need (more details to the right).

Pricing for either option maintains a very simple monthly fee covering the daily data transfer.

| Standard Package | Custom Package |
|------------------------------------|---------------------------------------|
| \$500 member or up to \$500/ month | Custom Quotes to start at \$800/month |

When you're ready to begin, place your order online via the Asterisk Intelligence page of the CUF/Answers team.

www.custanswers.com/product-category/asterisk-intelligence

A Solution For Everyone

Choose from one of two levels for a solution that works best for your workflow.

STANDARD PACKAGE - Just Starting Out

The standard DEX package includes a carefully selected predefined list of database tables which capture the most important member and account information. The standard package includes 50 tables and the data transfer can typically be handled quite fast in a custom package.

This is the recommended starting point for anyone either just beginning to manage an external data warehouse, looking for a lower cost solution, or only extracting a small amount of data and ready to expand.

CUSTOM PACKAGE - More Data, More Options

For a custom flow to your automatic data feed, consider the custom package. With this option you can choose more or less, or simply sweep tables to make sure you're getting the ones which mean the most for your data strategies.

Contact the Asterisk Intelligence team at CUF/Answers for more information on our products supporting credit union data analytics and data warehouse solutions!

HAVE A QUESTION?
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SnapShot Overview & FAQ

Flyer - 1 page

SNAPSHOT OVERVIEW
DATA TRANSFERS (QUERY RESULTS) (OPERATIONS)
Snapshot (FLEx) is a rolling copy of your processing data as of yesterday

End of Day (EOD) Data Time Slice

Attention Data Users

Imagine you could take a picture of every data point in your database just before you roll into the next business day - A snapshot in time to preserve a piece of your yesterday's work. What would you do with this picture?

CUF/Answers offers a free Snapshot (FLEx) data library for all credit unions on the CUF/Answers Core. Access to Snapshot is available by request only - Order via the CUF/Answers Order Store.

No management or customization required, it's an instant solution for a consistent, new time slice of your existing data.

Top 5 Reasons To Love SnapShot

- Every Piece of Data, Daily!**
No rows are cut here. Every single table, row, and column that you find in the daily processing database has a corresponding record in Snapshot.
- Latest Possible Moment**
The picture will be developed within normal end-of-day (EOD) processing as you conveniently capture the final values for any given day.
- Now Time Slice for Analytics & Researchers**
Comparing current day data to yesterday's data aids in member support, research, financials, and other queries where being in the moment is important.
- Quadrupled Processing Window**
Data transfers to vendors or your own teams can be larger and more flexible as they are moved outside the Operations cycle (a 3-5 hour window) and now run from the Snapshot data (available 24 hours).
- Seamless Operating**
The transition to vendor data transfers off Snapshot has been seamless and many custom data transfers already use it.

One Of The Family

SnapShot is native to CUF/Answers and functions as a third operational data environment:

- FLEx (raw data for live transaction processing)
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- FLEx (raw data for live transaction processing)

For requested details on our other support core system processing features.

Contact the Asterisk Intelligence team at CUF/Answers for more information on all the database environments in CUF/Answers.

HAVE A QUESTION?
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SNAPSHOT FAQ

ATTENTION DATA USERS

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USERS OF SNAPSHOT

Database Managers, Data Analysts, Database Administrators, Business Intelligence Query Users, IT Managers

FAQ & RULES

Retention: The full Snapshot library is deleted during each end-of-day processing, and immediately replaced with a new set of the prior day's files. Snapshot has a 1-day retention period.

Authenticity: Any CUF/Answers user ID will be able to read the files in Snapshot library for building queries. No control access with CUF/Answers Tool Authority on Tool #108.

Report Builder (Query)

Availability

SnapShot is designed to operate with little to no interruption in availability during scheduled server rollbacks to the CUF/Answers backup servers in Yarnes, SD.

Back-Up

End-of-day (EOD) backups are kept for a 30-day rotation as physical tape copies.

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For requested details on our other support core system processing features.

READ THE MANUAL

Check out our manual for a reference. Available both online and offline with more specific information regarding the Snapshot data library and other data warehouse projects from Asterisk Intelligence.

END USER SNAPSHOT ACCESS
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What is a Database View?

Flyer - 1 page

WHAT IS A DATABASE VIEW?

ASTERISK INTELLIGENCE

A database "View" is an SQL term which refers to an alternate way of representing the data that is stored in tables. It is NOT an actual table, but it will function as one during query or report writing. A view is a solution for looking at data that is stored in one or more existing tables.

Views require programming to develop and are capable of combining data from multiple tables, calculating and summarizing information, as well as only showing select portions of the data via programmed data filters.

How do I find Views which exist today?

332 - Database Search Assistant

Views can help us:

- On-site Sensitive Data such as SSN
- Remove cryptic column headers
- Logically combine data from multiple tables
- Change data format, such as date values or numeric values
- Perform calculations as well as "filter" or "logic"

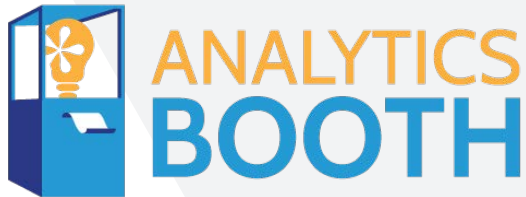
Available Today - Use these in your custom Queries!

MBRNLCTGQ - Combines all 6 of the MBRNLCTGQ files into a single view allowing for the easy calculation of total membership, count of all accounts, and members with or without product comparisons.

MBRNLCTGQ - Combines closed account data from all 6 ACHST files for memberships which have been closed. This file does not include closed account data on memberships which are still active.

What tasks could you simplify with these Views?

CONTACT ASTERISK INTELLIGENCE



Analytics Booth is an external data warehouse with a daily data feed of 70+ data points from CU*BASE for alerts, trending, and analysis.

Email alerts are delivered to your inbox every day, or customized to only send when certain changes are seen.

Access historical trends and data via a web browser - No sensitive data means you can let *anyone* see information on your financial and product portfolios.

Analytics Booth Overview

Flyer - 1 page



Analytics Booth Board Briefing

Flyer - 1 page



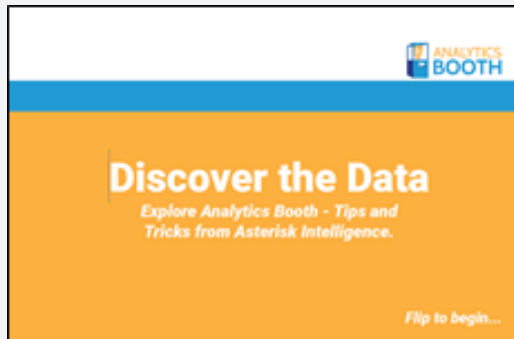
Getting Started Guide for Analytics Booth

Booklet - 8 pages



Analytics Booth Flip Cards

Card Book - 12 pages



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