



Asterisk Intelligence Week

*at CU*Answers*

Hello!

So you're going to be visiting CU*Answers headquarters for our Asterisk Intelligence Week event - We're happy you'll be coming out to visit! Please read the information included here for advice and tips on planning for your visit

CU*ANSWERS

6000 28th Street NW, Grand Rapids, MI 49546

What to Expect

There are no fees or registration costs for Asterisk Intelligence Week sessions, but travel and hotel accommodations are at your expense if you plan to attend any of the sessions offered on-location at CU*Answers headquarters. CU*Answers provides catering for breakfast and lunch each day - details are below.

Technology

If you are attending the Report Builder (Query) session please be sure to confirm and test ahead of time that you have a laptop available to bring, and that it is capable of remotely connecting to CU*BASE (VPN to your CU's home network).

Access to CU*BASE is important for the hands-on workshop sections of these sessions. A portable mouse is also suggested, but not required.

Travel

When making your travel plans to and from Grand Rapids, Michigan, please plan on arriving by the morning start-time of your first session. Please plan your departures for after the end-time listed on your last session. Review the agenda/schedule for exact times of each session.

Hotel

There are several hotels near our office location and many choices throughout the Grand Rapids area. We have corporate rates at the DoubleTree by Hilton and The Drury Inn - For those you will need to call and ask for the CU*Answers Corporate rate and it is not a room block.

Some hotels will have shuttle services that can bring you to and pick you up from our office location - Check with the hotel before booking if you are looking for that amenity.



Our Office

The event is at our corporate headquarters in Grand Rapids, Michigan. The address is 6000 28th St SE Grand Rapids, MI 49546. Below is an image of our building with the main entrance and visitor parking areas noted. You're welcome to park anywhere in the lot, but please do only come in through the main entrance to get your badge from our receptionist.



The Space

The room has Wi-Fi for you, and is designed with electrical outlets throughout (including in the floor) for powering devices throughout the day.

Dress is casual. The room does tend to be chilly sometimes so we recommend you dress in layers.

Food

Breakfast: Continental breakfasts at 8:30 AM at CU*Answers.

Lunch: Catered lunches at 12:00 PM to 1:00 PM

Snacks: Available each day, provided by CU*Answers

Dinner: Dinner each night is up to you. There are many restaurants in the area close by our office location.

**please let us know of any special dietary needs and we can do our best to accommodate*

Schedule

CLASSROOM

Monday: 9:00am - 4:00pm
Building an Audience for Data with Analysis

Please Bring:

Optional – Laptop with ability to connect remotely to CU*BASE.

Tuesday: 9:00am - 4:00pm
Report Builder Skills Session

Please Bring:

Required – Laptop with ability to connect remotely to CU*BASE.

Wednesday: 9:00am - 2:00pm
Prove It with Data: Strategies and Solutions

That's it! We'll wrap up by 2:00 on Wednesday in order to give an open afternoon to all who are participating in all three sessions.

WEBINAR

Thursday: 9:00am - 4:00pm
9:00am - 10:30am
Introduction to Analytics Booth

1:00pm - 2:00pm
Hot Topics in Database Management

February Topic: Self-Directed Data Floods

May Topic: no webinar scheduled

August Topic: Unique Data Management (UDM) Custom Fields

December Topic: Query Management Strategies – Automation and Database Changes

3:00pm - 4:00pm
Quick Projects for Data Analysts

February Topic: Opportunities in where your members spend and borrow

May Topic: no webinar scheduled

August Topic: Patterns of branch teller traffic

December Topic: Identifying lending opportunities

Today's schedule is online webinars only – participation is flexible – attend just one or all three, whatever makes sense for you!



Location: CU*Answers

6000 28th Street NW | Grand Rapids, MI 49546 +

Recommended Tools for AI Week

Building an Audience for Data With Analysis

CU*BASE

Tool access is not required for this event, but it is recommended if you will be bringing a laptop to follow along or for future use once you return home to your credit union. There are more than 100 Dashboard tools in CU*BASE.

If you would like to narrow it down, here's the top 25 which are most popular with credit unions and helpful to follow along with what tools and topics covered within Asterisk Intelligence Week.

- 141 – ARU/Online Banking Stats
- 159 – Audit CU File Maintenance
- 229 – Collections Dashboard/Summary
- 232 – Common Bonds for Member Group
- 319 – Credit Score History Analysis
- 369 – Fee Income/Waivers
- 432 – Learn from Peer: Network Password Resets
- 473 – Loan Risk Score Analysis
- 484 – Look-to-Book Ratio Analysis
- 536 – Money Movement Analysis
- 547 – Net Relationships
- 552 – New/Closed/All Accounts
- 553 – New/Closed/All Memberships
- 557 – NSF/ANR Statistics
- 594 – Portfolio Analysis EFT Usage
- 595 – Portfolio Analysis Loans
- 596 – Portfolio Analysis Savings
- 844 – Teller Activity by Day of Month
- 846 – Teller Activity by Time of Day
- 856 – Tiered Service Monthly Comparison
- 976 – Where Your Members Borrow
- 977 – Where Your Members Branch
- 979 – Where Your Members Shop
- 1170 – Loan Interest Accruals
- 1670 – Loan Productivity

Analytics Booth

A subscription to Analytics Booth is not required but if your credit union does have a subscription we recommend testing your login credentials. Visit www.analyticsbooth.com in the Chrome web browser to test your credentials. Your username is typically your credit union email address and the software provides a “Forgot Password” process to reset your password if needed.

Report Builder Skills Session

These are the tools we will cover and we recommend you have access to each. The ones absolutely required are Tool 100 and 332:

- 100 – Report Builder (Query)
- 332 – Database Search Assistant
- 1980 – Library Dashboard
- 1375 – Data Transfers (Uploads and Downloads)

- Tool 1375 is not required, but recommended if you are an approved person to download data from CU*BASE. This tool will only work if you ALSO have special download authority permissions. If you do not have those, the decision is up to your Security Officer and you may need to route file downloads to an authorized person instead.

- 654 – Print List of Custom Reports/Inquiries
- 758 – Report Automation – Custom Reports/Files

