Discover the Data

Explore Analytics Booth - Tips and tricks from Asterisk Intelligence.

Flip to begin...

Discover the Data #1

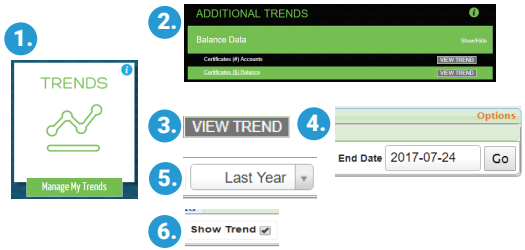
ANALYTICS BOOTH

Can you find this information in Analytics Booth?

Flip to learn how...

Path to Discovery

1. Start by entering the Trends panel
2. Find the additional trends section
3. Click the “View Trend” button next to certificates ($)
4. Under options, confirm today’s date is entered in the field labeled “End Date” and press GO
5. Adjust time-slice drop down to be “Last Year”
6. Display the trend line by checking the box “Show Trend”



Feature Spotlight

Graph Navigation
Immediately see details for a specific data point by hovering over it on the graph line.

Bonus tip: CLICK that data point to access another feature called Annotations which allows you to enter a question or comment for later reference.

Trend Line
Watch a trend line cut through the ups and downs of your graph for a more concise picture of activity.

Bonus tip: Also select that option for averaging to see your data’s historical average value, plus a high and low value.

Time Slicing
Control the context of your trend line in two ways – Choose one of the predefined date ranges from a drop down, or manually enter a specific start- and end-date.

Bonus Tip: Try looking first at prior 30 days, then switch out to “Last Year” to look for seasonality.

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Discover the Data #2

ANALYTICS BOOTH

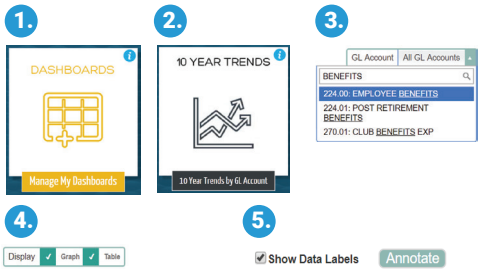
Can you find this information in Analytics Booth?

Year	December Year-End Balance	Percent Change	Net Change
2017 as of 09/2017	69,780	-53.7	-81,015
2016	150,795	58.2	55,475
2015	95,320	-7.3	-7,543
2014	102,863	7.3	7,039
2013	95,825	63.4	37,192
2012	58,633	0.0	58,633
2011	0	0.0	0
2010	0	0.0	0
2009	0	0.0	0
2008	0	0.0	0
2007	0	0.0	0

Flip to learn how...

Path to Discovery

1. Click the Dashboards panel
2. Click the 10 Year Trends panel
3. Search for a specific GL within the 'GL Account' section
4. Customize by clicking the box next to 'Graph'
5. Customize by clicking the box for 'Show Data Labels'



Feature Spotlight

Deeper Analysis – Click Filters
Underlined values are clickable! Click any underlined value to view additional information related to the item you clicked on. In this dashboard, clicking a year will automatically take you into a new window with the 3 Year Comparison analysis for this GL or Budget Group.

Data Labels
Most dashboards have this handy little feature available to bring in values directly on the graph line for each data point. Keep in mind if your graph's timeline is extended to a larger range of time, it could get crowded with data labels added in.

BONUS - Annotations
Are you keeping an extra close eye on this GL? Or need to make some notes to remember a question for the next board meeting or report? Select any data point and double-click or click the 'Annotate' button to log a quick note. Make the annotation public for other users to see, or keep it private for your personal records.

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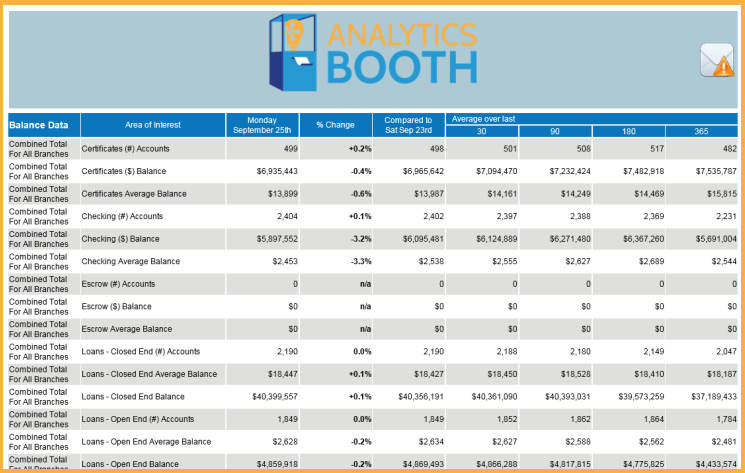
Discover the Data #3

ANALYTICS BOOTH

Can you find this information in Analytics Booth?



ANALYTICS BOOTH

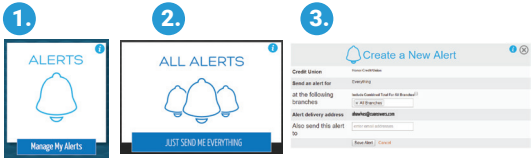
Balance Data	Area of Interest	Monday September 25th	% Change	Compared to Sat Sep 23rd	Average over last 30	90	180	365
Combined Total For All Branches	Certificates (#) Accounts	499	+0.2%	498	501	508	517	482
Combined Total For All Branches	Certificates ($) Balance	$6,935,443	-0.4%	$6,965,642	$7,094,470	$7,232,424	$7,482,918	$7,535,787
Combined Total For All Branches	Certificates Average Balance	$13,899	-0.6%	$13,987	$14,161	$14,249	$14,469	$15,815
Combined Total For All Branches	Checking (#) Accounts	2,404	+0.1%	2,402	2,397	2,388	2,369	2,231
Combined Total For All Branches	Checking ($) Balance	$5,897,552	-3.2%	$6,095,481	$6,124,889	$6,271,480	$6,367,260	$5,691,004
Combined Total For All Branches	Checking Average Balance	$2,453	-3.3%	$2,538	$2,555	$2,627	$2,689	$2,544
Combined Total For All Branches	Escrow (#) Accounts	0	n/a	0	0	0	0	0
Combined Total For All Branches	Escrow ($) Balance	$0	n/a	$0	$0	$0	$0	$0
Combined Total For All Branches	Escrow Average Balance	$0	n/a	$0	$0	$0	$0	$0
Combined Total For All Branches	Loans - Closed End (#) Accounts	2,190	0.0%	2,190	2,188	2,180	2,149	2,047
Combined Total For All Branches	Loans - Closed End Average Balance	$18,447	+0.1%	$18,427	$18,450	$18,528	$18,410	$18,187
Combined Total For All Branches	Loans - Closed End Balance	$40,399,557	+0.1%	$40,356,191	$40,361,090	$40,393,031	$39,573,259	$37,189,433
Combined Total For All Branches	Loans - Open End (#) Accounts	1,849	0.0%	1,849	1,852	1,862	1,864	1,784
Combined Total For All Branches	Loans - Open End Average Balance	$2,628	-0.2%	$2,634	$2,627	$2,588	$2,562	$2,481
Combined Total For All Branches	Loans - Open End Balance	$4,859,918	-0.2%	$4,869,493	$4,866,288	$4,817,815	$4,775,825	$4,433,574

Flip to learn how...

Path to Discovery

1. Click the Alerts panel
2. Click the All Alerts panel (Just Send Me Everything)
3. Click the 'Save Alert' button
4. Look to receive your first daily email alert tomorrow morning!

Optional – Refine filters by choosing a specific branch, or choose to also send a copy of the alert email to another person.



Feature Spotlight

The FULL View
The full alert (Just Send Me Everything) is a daily digest for every single data point tracked by Analytics Booth. Configuring this alert is ideal for new users to begin with a baseline set of data values which assists to establish "what is normal?" before beginning to configure any custom alerts.

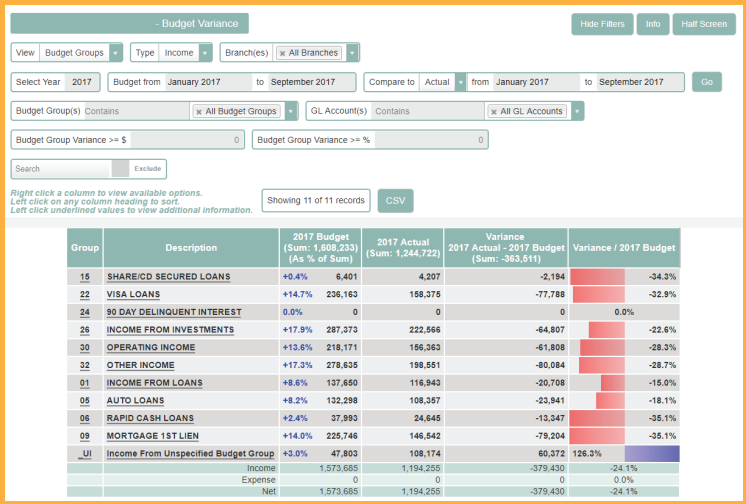
BONUS – Custom Alerts
Swap out Step 2 with clicking the panel for 'New Alert' and instead narrow down your alerts to one specific data point at a time, and set the notifications to email only if it changes within the parameters you choose.

Edit or Delete
When you're done with the Everything alert, go back to the Alerts panel and delete it from your alert directory called 'My Saved Alerts'

Discover the Data #4

ANALYTICS BOOTH

Can you find this information in Analytics Booth?



Group	Description	2017 Budget (Sum: 1,608,233) (As % of Sum)		2017 Actual (Sum: 1,244,722)	Variance 2017 Actual - 2017 Budget (Sum: -363,511)	Variance / 2017 Budget
15	SHARE/CD SECURED LOANS	+0.4%	6,401	4,207	-2,194	-34.3%
22	VISA LOANS	+14.7%	236,163	158,375	-77,788	-32.9%
24	90 DAY DELINQUENT INTEREST	0.0%	0	0	0	0.0%
26	INCOME FROM INVESTMENTS	+17.9%	287,373	222,566	-64,807	-22.6%
30	OPERATING INCOME	+13.6%	218,171	156,363	-61,808	-28.3%
32	OTHER INCOME	+17.3%	278,635	198,551	-80,084	-28.7%
01	INCOME FROM LOANS	+8.6%	137,650	116,943	-20,708	-15.0%
05	AUTO LOANS	+8.2%	132,298	108,357	-23,941	-18.1%
06	RAPID CASH LOANS	+2.4%	37,993	24,645	-13,347	-35.1%
09	MORTGAGE 1ST LIEN	+14.0%	225,746	146,542	-79,204	-35.1%
UI	Income From Unspecified Budget Group	+3.0%	47,803	108,174	60,372	126.3%
	Income		1,573,685	1,194,255	-379,430	-24.1%
	Expense		0	0	0	0.0%
	Net		1,573,685	1,194,255	-379,430	-24.1%

Flip to learn how...

Path to Discovery

1. Click the Dashboards panel
2. Click the Budget Variance panel
3. Click the underlined word 'Income' in the table
4. Customize & Analyze!
   - Visualize
   - Vertical Analysis

Optional – Refine filters by choosing a Budget Group, specific GL Account, or Branch location

1.

2.

3.

Summary	2017 Budget
Income	0
Expense	0
Net	0

Feature Spotlight

Deeper Analysis – Click Filters
Underlined values are clickable! Click any underlined value to view additional information related to the item you clicked on. Each of your selections will automatically update the top filter section to reflect the changes to your data view.

Column Visualization
Right-click on any data column and choose 'Visualize' to quickly spotlight outliers or trends with a visual indicator. Remember, you can do this on multiple columns!

Calculation - Vertical Analysis
Right-click on a data column and select "Vertical Analysis" to immediately see every value's representation within the whole set of data.

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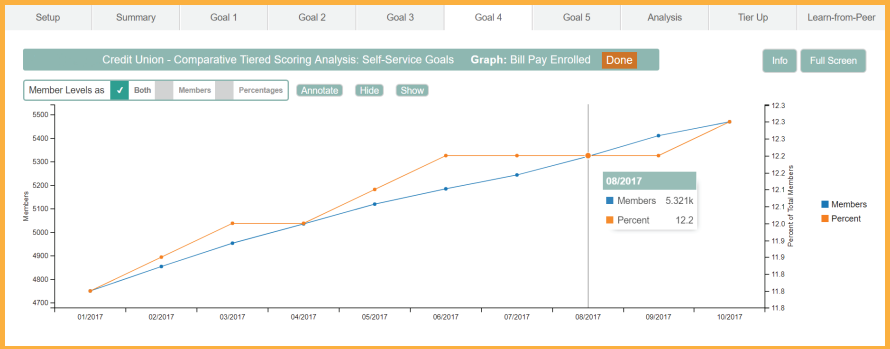
Discover the Data #5

ANALYTICS BOOTH

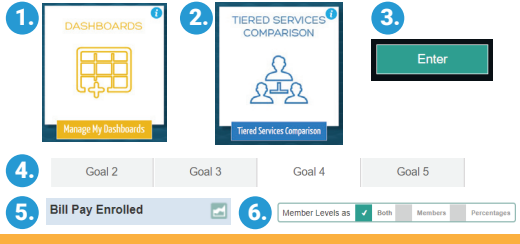
Can you find this information in Analytics Booth?



Flip to learn how...

Path to Discovery

1. Click the Dashboards panel
2. Click the Tiered Service Comparison panel
3. Scroll to the bottom and click the 'Enter' button
4. Select the tab for 'Goal 4' across the top
5. Select the Graphing icon next to 'Bill Pay Enrolled'
6. Change the 'Member Levels Option' to select Both



Feature Spotlight

Rich Selection of Options
Don't stay in Goal 4 for long, go back up to the top and explore the other Goals. Any data point you see within Goals 1-5 can be graphed similar to the one we see here. Remember, if you do not currently have a full tiered scoring system in place, it will be normal to see some of the data points blank.

BONUS - Annotations
Select any data point and log a quick note to explain its context. Make the annotation public for other users to see, or keep it private for your personal records.

BONUS - Learn From Peer
Click the Learn-From-Peer option in the top navigation row (after Tier Up) to compare your credit union's numbers against all other credit unions in the network.

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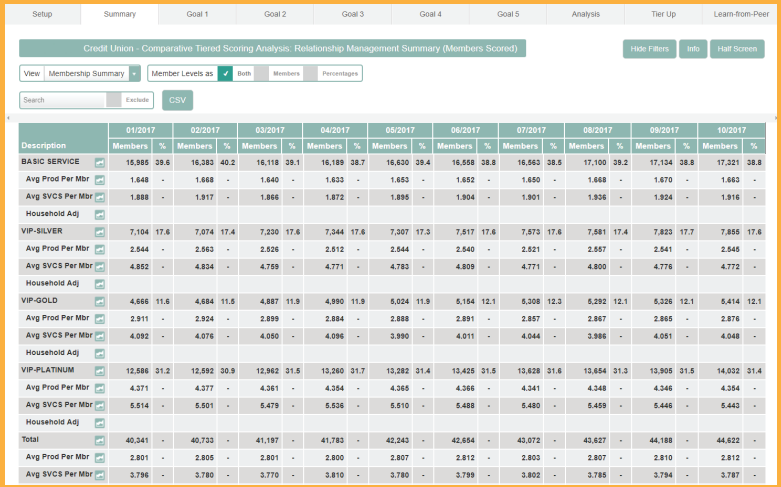
Discover the Data #6

ANALYTICS BOOTH

Can you find this information in Analytics Booth?



Setup | Summary | Goal 1 | Goal 2 | Goal 3 | Goal 4 | Goal 5 | Analysis | Tier Up | Learn-from-Peer

Credit Union - Comparative Tiered Scoring Analysis: Relationship Management Summary (Members Scored)

Hide Filters | Info | Half Screen

View: Membership Summary | Member Levels as: Both | Members | Percentages

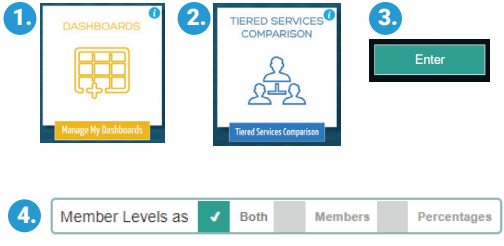
Search | Exclude | CSV

Description	01/2017		02/2017		03/2017		04/2017		05/2017		06/2017		07/2017		08/2017		09/2017		10/2017	
	Members	%	Members	%	Members	%	Members	%	Members	%	Members	%	Members	%	Members	%	Members	%	Members	%
BASIC SERVICE	16,985	39.6	16,383	40.2	16,118	39.1	16,189	38.7	16,630	39.4	16,558	38.8	16,563	38.5	17,100	39.2	17,134	38.8	17,321	38.8
Avg Prod Per Mbr	1.648	-	1.668	-	1.640	-	1.633	-	1.653	-	1.652	-	1.650	-	1.668	-	1.670	-	1.663	-
Avg SVCS Per Mbr	1.888	-	1.917	-	1.866	-	1.872	-	1.895	-	1.904	-	1.901	-	1.936	-	1.924	-	1.916	-
Household Adj																				
VIP-SILVER	7,104	17.6	7,074	17.4	7,230	17.6	7,344	17.6	7,307	17.3	7,517	17.6	7,573	17.6	7,581	17.4	7,823	17.7	7,855	17.6
Avg Prod Per Mbr	2.544	-	2.563	-	2.526	-	2.512	-	2.544	-	2.540	-	2.521	-	2.557	-	2.541	-	2.545	-
Avg SVCS Per Mbr	4.852	-	4.834	-	4.759	-	4.771	-	4.783	-	4.809	-	4.771	-	4.800	-	4.776	-	4.772	-
Household Adj																				
VIP-GOLD	4,666	11.6	4,684	11.5	4,887	11.9	4,990	11.9	5,024	11.9	5,154	12.1	5,308	12.3	5,292	12.1	5,326	12.1	5,414	12.1
Avg Prod Per Mbr	2.911	-	2.924	-	2.899	-	2.884	-	2.888	-	2.891	-	2.857	-	2.867	-	2.865	-	2.876	-
Avg SVCS Per Mbr	4.092	-	4.076	-	4.050	-	4.096	-	3.990	-	4.011	-	4.044	-	3.986	-	4.051	-	4.048	-
Household Adj																				
VIP-PLATINUM	12,586	31.2	12,592	30.9	12,962	31.5	13,260	31.7	13,282	31.4	13,425	31.5	13,628	31.6	13,654	31.3	13,905	31.5	14,032	31.4
Avg Prod Per Mbr	4.371	-	4.377	-	4.361	-	4.354	-	4.365	-	4.366	-	4.341	-	4.348	-	4.346	-	4.354	-
Avg SVCS Per Mbr	5.514	-	5.501	-	5.479	-	5.536	-	5.510	-	5.488	-	5.480	-	5.459	-	5.446	-	5.443	-
Household Adj																				
Total	40,341	-	40,733	-	41,197	-	41,783	-	42,243	-	42,654	-	43,072	-	43,627	-	44,188	-	44,622	-
Avg Prod Per Mbr	2.801	-	2.805	-	2.801	-	2.800	-	2.807	-	2.812	-	2.803	-	2.807	-	2.810	-	2.812	-
Avg SVCS Per Mbr	3.796	-	3.780	-	3.770	-	3.810	-	3.780	-	3.799	-	3.802	-	3.785	-	3.794	-	3.787	-

Flip to learn how...

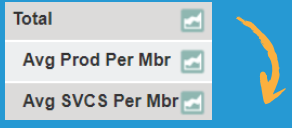
Path to Discovery

1. Click the Dashboards panel
2. Click the Tiered Service Comparison panel
3. Scroll to the bottom and click the 'Enter' button
4. Change the 'Member Levels Option' to select Both



Feature Spotlight

Visualize with a Graph
Turn any row into a friendly graph with the small graphing icon next to each description in the far-right column



Export to CSV
Transfer the data into a Comma Delimited file (.csv) for flexible external tracking and analysis.

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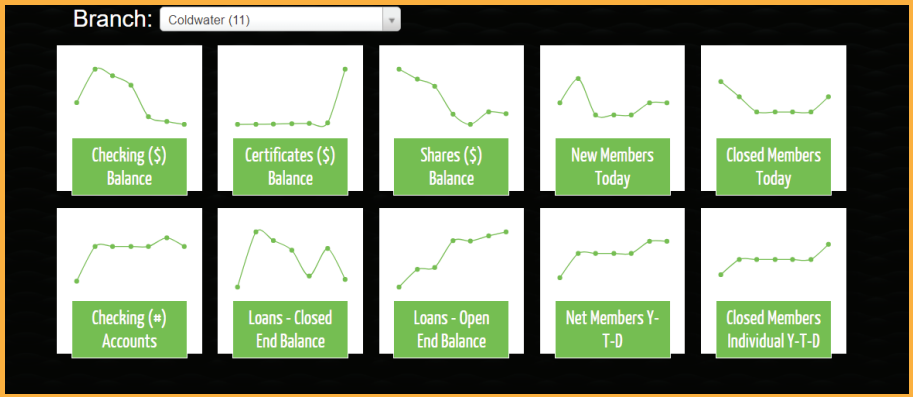
Discover the Data #7

ANALYTICS BOOTH

Can you find this information in Analytics Booth?



Flip to learn how...

Path to Discovery

1. Click the Trends panel
2. Scroll past the header information
3. Preview Mode! (the graph line you see is the real picture of last 7 days)
4. Analyze! (Click any of the mini-graphs to graph it historically)

Feature Spotlight

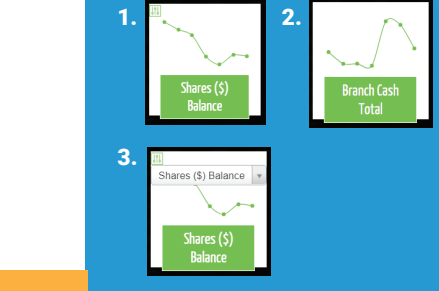
Customize the View

Want to promote a different data point into your mini-graph panel? You are not locked in to the 10 options already available! Simply follow these steps to swap any of data points with another:

1) Hover in the top-right of the individual mini-graph that you want to swap and click the small green filters icon that appears.

2) Choose a data point off the list.

3) Check out your new mini-graph!



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Discover the Data #8

ANALYTICS BOOTH

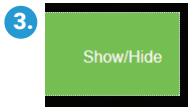
Can you find this information in Analytics Booth?

Flip to learn how...

Path to Discovery

1. Click the Trends panel
2. Scroll past the mini-graphs to 'Additional Data'
3. Select 'Show/Hide' within any category
4. Analyze! (Click 'View Trend' to graph a specific data point)

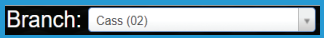
   Optional – Filter to a specific branch location's data using the 'Branch' drop down above the mini-graphs.



Feature Spotlight

Expansive Data Selection
70+ individual data points within these 6 categories can be graphed with for historical trending. Historical data is available back to the date your Analytics Booth subscription went live.

BONUS
Customize to a Specific Branch
Directly above the 10 mini-graphs, use the 'Branch' drop down to select a specific branch to filter data down to only that specific branch's activity. Great for branch managers, spotlighting a recently opened branch to evaluate performance, etc.



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Discover the Data #9

ANALYTICS BOOTH

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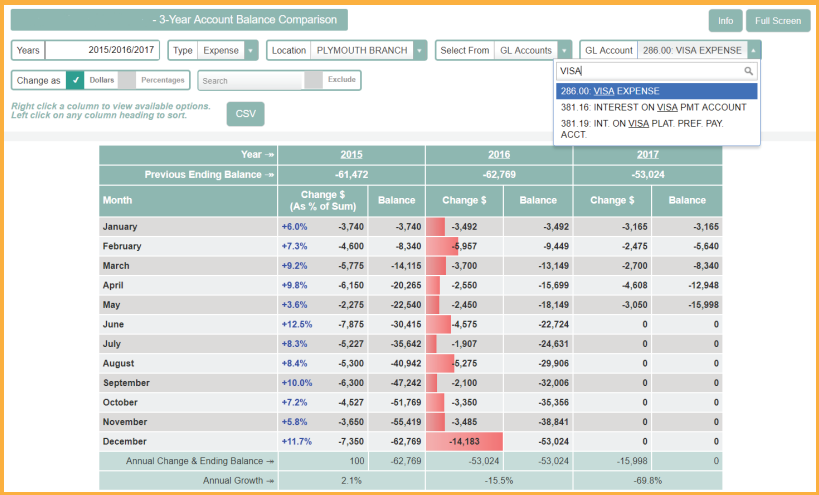
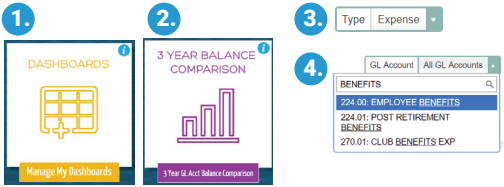


Year →	2015		2016		2017	
Previous Ending Balance →	-61,472		-62,769		-53,024	
Month	Change $ (As % of Sum)	Balance	Change $	Balance	Change $	Balance
January	+6.0% -3,740	-3,740	-3,492	-3,492	-3,165	-3,165
February	+7.3% -4,600	-8,340	-5,957	-9,449	-2,475	-5,640
March	+9.2% -5,775	-14,115	-3,700	-13,149	-2,700	-8,340
April	+9.8% -6,150	-20,265	-2,550	-15,699	-4,608	-12,948
May	+3.6% -2,275	-22,540	-2,450	-18,149	-3,050	-15,998
June	+12.5% -7,875	-30,415	-4,575	-22,724	0	0
July	+8.3% -5,227	-35,642	-1,907	-24,631	0	0
August	+8.4% -5,300	-40,942	-5,275	-29,906	0	0
September	+10.0% -6,300	-47,242	-2,100	-32,006	0	0
October	+7.2% -4,527	-51,769	-3,350	-35,356	0	0
November	+5.8% -3,650	-55,419	-3,485	-38,841	0	0
December	+11.7% -7,350	-62,769	-14,183	-53,024	0	0
Annual Change & Ending Balance →	100	-62,769	-53,024	-53,024	-15,998	0
Annual Growth →	2.1%		-15.5%		-69.8%	

Flip to learn how...

Path to Discovery

1. Click the Dashboards panel
2. Click the 3-Year Comparison panel
3. Customize the 'Type' section to Expense
4. Search for a specific GL within the 'GL Account' section
5. Optional – Choose a specific branch in the 'Location' section
6. Customize & Analyze!
   - Visualize
   - Vertical Analysis

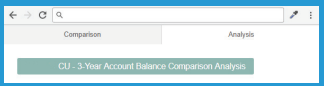


Feature Spotlight

Column Visualization
Right-click on any data column and choose 'Visualize' to quickly spotlight outliers or trends with a visual indicator. Remember, you can do this on multiple columns!

Calculation - Vertical Analysis
Right-click on a data column and select "Vertical Analysis" to immediately see your data as a weight of the entire portfolio.

BONUS
Switch to Analysis Mode!
Click the 'Analysis' tab at the top-right of the window to view statistics on the data seen for each year in your selection filters, plus a quarterly breakdown for each.



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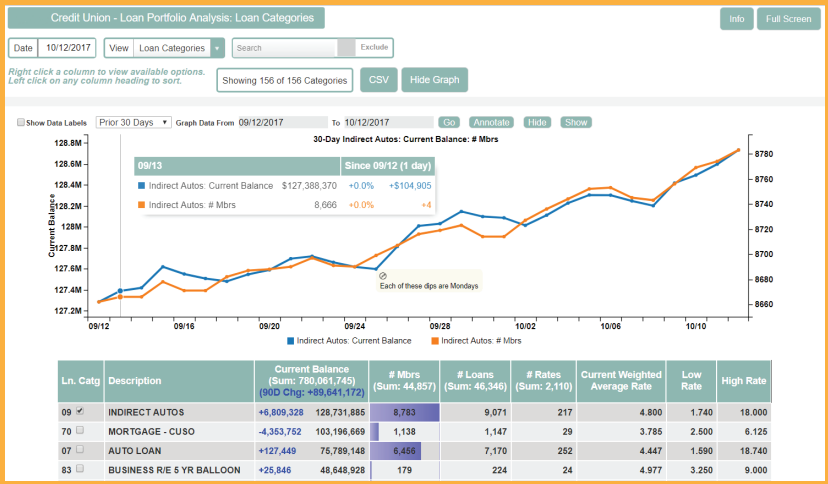
Discover the Data #10

ANALYTICS BOOTH

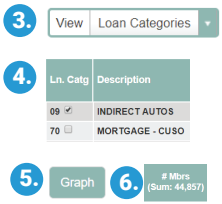
Can you find this information in Analytics Booth?



Flip to learn how...

Path to Discovery

1. Click the Dashboards panel
2. Click the Loan Portfolio panel
3. Change the 'View' drop down to Loan Categories
4. Select the checkbox next to any loan category
5. Click the 'Graph' button
6. While holding the CTRL key, click the column for '# Mbrs'
7. Customize and Analyze!
   - Calculation – Change Over Days
   - Column Visualization
   - Multi-Factor Graphing



Feature Spotlight

Calculation - Change Over Days
Right-click on a column and select "Change over Days" to calculate the net change year-to-date, month-to-date, prior 30 days, any custom range, and more. This example selected 90 days to gain long-term context as a complement to the graph displaying only 30 days of history.

Column Visualization
Right-click on any data column and select "Visualize" to quickly identify the top and bottom portfolio contributors, even with your table sorted by other fields.

Multi-Factor Graphing
The default column in any graph is generally 'Current Balance'. Add some context by adding any other column. Simply hold the CTRL key and click the column you want to add.

Annotations
Select any data point and log a quick note to explain its context. Make the annotation public for other users to see, or keep it private for your personal records.

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