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# Documentation: Tricks of the Trade

## TIP #1: Where Can I Find A Listing of the CU\*BASE Dashboards?

We are introducing more and more dashboards in CU\*BASE—so many that we have updated our “Leadership Dashboards” publication. In it you will now find a listing of all of our dashboards, grouped by menu and listed by menu option. The right column includes a brief explanation of how you can immediately put this dashboard to good use.

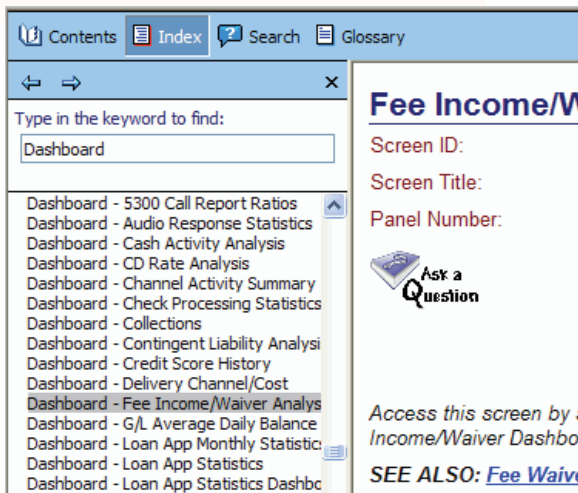
Find the 4-page “Leadership Dashboards” under “D” on the CU\*BASE Reference Page. Go directly to this publications via:

[http://cuanswers.com/pdf/cb\\_ref/LeadershipDashboards.pdf](http://cuanswers.com/pdf/cb_ref/LeadershipDashboards.pdf)



Check out the “Leadership Dashboards” publication or a complete listing of dashboards available in CU\*BASE.

Use Index Keyword “Dashboard” to find help topics for the CU\*BASE Dashboard screens.



## TIP #2: How Can I Quickly Find Help for the CU\*BASE Dashboards?

Want an easy way to find help on all of the help topics on the CU\*BASE Dashboards? It’s easy to find them by using Index Keyword “Dashboard.”

Check out the “Dashboard Tips” topic as well, for a discussion of questions to ask when comparing one dashboard to another dashboard or report.

## TIP #3: What Kind of Information about Dashboards Can I Find in the CU\*BASE Online Help?

The screenshot shows the 'Channel Activity by Member Age Group' dashboard page in the CU\*BASE Online Help. The page includes a search bar at the top, a 'Powered By RoboHel' logo, and a navigation menu on the left. The main content area displays the following information:

- Screen ID: ICHSUM-01
- Screen Title: Channel Activity Summary
- Panel Number: 118
- Data Source: MACKASUM
- Snap Shot:  As of Month End,  Right Now

Below this information is a small thumbnail of the dashboard and an 'Ask a Question' icon. The page also contains several links and notes:

- Access this screen by selecting MNMGMA #1-Channel Activity by Mbr Age Grp.
- NOTE: Because this dashboard uses End-of-Month data, activity during the current month will not be included.
- TIPS for CEOs
- Go to Examples
- Create full-color PDFs of the data and charts on the screen – PDF Exports
- Learn about downloading data to Excel or a comma-delimited file
- Dashboard Tips – Questions to Ask When Comparing a Dashboard with Another Dashboard or Report
- IMPORTANT: Because data comes from transaction history, activity such as cashing checks which don't

Check out the CU\*BASE Online Help for all kinds of tips on using the CU\*BASE Dashboards.

The first sentence lets you know what menu and option to use to get to the dashboard.

Included also are links to topics on creating full color PDFs of the dashboard data, as well as the “Dashboard tips” topic with questions to ask when comparing a dashboard to another dashboard or report.

Some topics also list additional helpful information, such as the Data Source and whether the dashboard is of a snapshot in time (As of Month End) or current data (Right Now). And that is only the top of the topic!

## TIP #4: Where Can I Learn More About the PDF Export Feature?

Use Index Keyword “PDF Export” to learn more about the feature that allows you to create attractive full-color PDFs of your dashboard data and charts—ready for your Board Reports! The “PDF Export” topic provides information on this feature, as well as directions for the purchase and installation of the iText Sharp software required for this feature.

The screenshot shows the 'PDF Exports' topic page in the CU\*BASE Online Help. The page includes a search bar at the top, a 'Powered By RoboHel' logo, and a navigation menu on the left. The main content area displays the following information:

- PDF Exports
- PDFVRTU
- Peer Analysis
- Peer Analysis 3
- Peer Analysis - Updating Data
- Peer Analysis 1
- Peer Analysis 2
- Peer Analysis Rankings
- Peer Criteria Selection
- Pending loan status
- Personal Banker Services
- Personal Info Update Requests from Ho
- Personal Internet Branch PIB Profile
- Personal Internet Branch PIB Profile
- Phone - Additional Transaction Informa
- Phone - Viewing Transaction History
- Phone - Additional Transaction Informa
- Phone - Account Processing
- Phone - Average Daily Balance Inquiry
- Phone - Loan Account Payoff Inquiry
- Phone - Member Account Transfer

Below this list is a thumbnail of the 'PDF Exports' dashboard and a 'How Does It Work?' section:

**How Does It Work?**  
This feature has been added to many dashboards and related screens in CU\*BASE, with plans expansion in the future. Dashboards with the PDF option can be accessed from many menus including the Management Dashboards, “Knowing Your Member,” Marketing, and Teller & Cash Tools menus.

Just click a new PDF icon (to the left of the existing Excel export icon) and CU\*

CEOs have asked us, “What way to create a colorful report (brainstorming sessions) the others in our organization? feature, you can do just the provides you with data and attractive, full-color format and distribute to a credit union management staff.

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