Cruise Control Analytics

The Latest in KeyStone Reporting

Picture a beautiful Friday afternoon. You're at your desk reviewing some reports that begin to look like a bunch of random data when you fall into a daydream about taking a convertible out for a drive. As you fall deeper into your imagination, you notice that everything about the car is built for speed and ease of use, even the dashboard.

Corelation has just launched eight new standard dashboards for KeyStone that may not display in your convertible but they will be a tremendous help in organizing your credit union's data. Their convenient, accessible format makes it easier to identify opportunities to increase efficiency and course-correct if necessary.

Your branch, executive, collections, and lending management can benefit from twenty-six new standard Jaspersoft reports that combine into dashboards crafted to provide analytics targeted to their roles, including the following:

- Branch Manager Dashboard
- CEO Dashboard
- CLO Dashboard
- COO Dashboard
- Collections Dashboard
- Loan Servicing Dashboard

For example, the Branch Manager Dashboard instantly displays loans originated, credit protection issued, and the total number of accounts, shares, and loan balances for the specific branch where the dashboard is accessed. The CEO Dashboard provides critical information about the general financial health of your credit union with a display that makes the information easy to understand with just a glance.

As with any dashboard, you can customize these standard dashboards to match your credit union's unique goals by modifying, adding, or replacing the standard reports. As you consider what your credit union's perfect custom dashboard would entail, the Samples of Different Chart Types dashboard is available to jump-start creativity with examples of different types of chart reports including bar charts, line charts, and pie charts that demonstrate the flexibility of summarizing large amounts of data in a compact space. If a minimal approach is all that is needed, the Default Dashboard provides your credit union's name and the accessed database so you can be confident knowing whether you are in a live or test environment.

The dashboards and their associated reports have been added to the Corelation library and are available to all clients who have loaded JasperReports Server 7.1 and KeyStone Release 2020_01 or later. Newly converting clients automatically have these new dashboards, while existing clients can download a zip file and follow a short

Contents

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process to install all eight dashboards and their twenty-six associated reports. As an added bonus, a new publishing method that is only available in Jaspersoft 7.1 makes the reports and dashboards immediately available across multiple environments.

To explain the benefits of these reports, who better to ask than your fellow Corelation credit unions? These credit unions helped review and test the new standard dashboards and reports during the development phase so we could craft them just right.

Margaret Nieter, Chief Innovation Officer for CommunityWide Federal Credit Union, says, "The new dashboards are really helpful for senior staff who need quick access to current data. The dashboards offer a wide variety of important and relevant information for management at the executive level on down to the branch manager level. Our CEO finds himself reviewing them several times in a given day." Margaret found the standard reports to be a great launching pad for further customization. "Jaspersoft 7.1 also makes dashboard design super easy, so having the base reports and charts accessible in the public library makes adding these new reports and charts to your own customized dashboards simple to do in just a few minutes. Even clients who are new to Jaspersoft should get great value out of these ready-made reports."

Linn Area Credit Union's President and CEO Jenny Lorenz adds her insights: "There are numerous metrics we track to measure performance throughout our operation. I was extremely excited when I learned about KeyStone's capabilities to have some of these metrics displayed on our desktops. I find great value in the ability to utilize one source for key data and trends." The use of analytics to chart progress is especially appealing to her group. "Additionally, the ability to tailor these dashboards to meet our credit union's specific needs is something we will definitely take advantage of. What gets measured gets done. These dashboards will keep these important measurements right in front of us which will keep us on track to accomplish our goals!"

According to Corelation's Research and Development Manager Carl Barlow, these standard dashboards and reports are just the tip of the iceberg when it comes to distilling the wealth of KeyStone's data into robust analytics. "As our clients and our staff gain experience in using the charting capabilities built into Jaspersoft—whether in single reports or combined in dashboards—I suspect we'll see a lot more demand for such summary information to complement the detailed reports that are used so heavily today."

Corelation is providing a wealth of resources to help you write or request additional dashboard-ready reports that are custom to your needs. Documentation and classes for beginning and advanced Jaspersoft reports training are available to cover these topics and others in more depth. The upcoming "Dashboard Deck" Webex training in October will contain detailed information about the new standard dashboard reports. To top it all off, the virtual Corelation Client Conference in October will offer a deep dive into the dashboard functionality and configuration instructions during the Technical Track sessions.

KeyStone's new dashboards may never have the thrill of driving a convertible, but these new tools will put you in the driver's seat when you need information at your fingertips. Contact your CRM or open a help desk ticket if you would like more information. 🗑

Upcoming Training and Seminars

October 20-22	Batch Scripting Training Webex
October 28, *12-1:30 p.m. PST*	Dashboard Deck Webex sponsored by **Bankjoy**
November 4, *12-1 p.m. PST*	KeyStone Operational Enhancements Webex sponsored by PROFIT RESOURCES
November 10-12	Beginner Jaspersoft Reports Training Webex
November 17-19	Advanced Jaspersoft Reports Training Webex
December 8-10	UI Scripting Training Webex
December 15-17	Batch Scripting Training Webex
December 16, *12-2 p.m. PST*	End-of-Year Tax Reporting & Best Practices Webex sponsored by enacomm®

Certified Partner Spotlight: IMSI

Congratulations to our certified partner IMSI on their recent 12th anniversary! IMSI has been serving credit unions with the best in web development, industry expertise, and superior customer service since 2008.

IMSI has been in the Corelation spotlight for many years. The two companies met when Orion Federal Credit Union converted to KeyStone back in 2012. As they worked together to transition Orion's integrations, it was clear that the two companies shared the same passion and drive for innovation. For IMSI, that passion and drive led them to develop new and improved tools for KeyStone clients to perform tasks efficiently and with consistent results. In fact, over 70% of KeyStone credit unions use one or more of IMSI's products. IMSI's clients range in size from under 10,000 to well over 450,000 members.

This year, IMSI is proud to introduce Infuzion, an extremely powerful tool developed to streamline complex functions, insert or extract data from KeyStone, and efficiently perform various tasks without the need to develop scripts or even understand Java.

Infuzion excels at many tasks such as mass database updates that translate INSERT, UPDATE, and DELETE SQL queries into KeyBridge to process updates in KeyStone. It can quickly build a delimited file, perform delimited file inputs in batch, and perform transaction rollbacks. Infuzion can also be scheduled through SMA Technologies' OpCon for added convenience. It can even perform mergers, all without having to write a script or a single line of programming code.

IMSI staff initially developed Infuzion for internal use to help them perform tasks in KeyStone. As demand for this product grew, it became clear that it needed to be made available for all credit unions. Today, Infuzion can benefit any credit union, even those without a programming staff. Training for the product can be done in a short amount of time so you can be on your way to better productivity very quickly. IMSI's clients agree that Infuzion is really a must-have tool for any credit union that wants to truly harness the power of the KeyStone API.

Support Services Manager Pam Barrett at Northwest Preferred Federal Credit Union says, "With no formal training and only a couple of hours of training with IMSI, I can write jobs to insert notes using .csv files. We also use the Infuzion product to change rates monthly, reprice loans, insert custom tables, and insert notes. The options are nearly endless! I highly recommend looking into it.

We have been able to do more with it than we would have dreamed without it."

IMSI is currently developing a customer portal forum where clients can discuss various uses for each product and review their peers' use cases. IMSI understands that collaboration with their customers fosters innovation so everyone benefits!

Devon Wilson, IMSI's Chief Operating Officer, shares, "We value our relationship with Corelation and are grateful for the close partnership we've developed over the years." The team here at Corelation couldn't agree more. We look forward to a long and fruitful relationship with the team at IMSI. For more information about Infuzion and IMSI's other products for KeyStone clients, visit IMSIntegration.com. 🍸

Client Spotlight

The votes are in! Forbes' Best Credit Unions in Each State List recognized many of our credit union partners. The ratings were awarded by surveying consumers about overall satisfaction, trust, terms and conditions, branch services, digital services, and financial advice.

We salute our clients for their exceptional service! Read more at Forbes.com.

- Alabama One Credit Union: #9
- Atomic Credit Union: #3
- CapEd Credit Union: #4
- Centris Federal Credit Union#3
- Clearwater Federal Credit Union: #2
- Desert Financial Credit Union: #3
- Directions Credit Union: #2
- Educational Systems Federal Credit Union: #4
- HAPO Community Credit Union: #5
- La Capitol Federal Credit Union: #1
- Launch Federal Credit Union: #4
- Liberty First Credit Union: #1
- Orion Federal Credit Union: #2
- People First Federal Credit Union: #4
- PSECU: #5
- Sandia Laboratory Federal Credit Union: #1
- Together Credit Union #3
- University of Hawaii Federal Credit Union: #5
- WESTconsin Credit Union: #3

Employee Profile: Kim Carter, Software Services

Here at Corelation, we ask each of our team members to strive to be as S.P.I.C.Y. as possible in every aspect of their job. Although we do appreciate our "seasoned" employees, S.P.I.C.Y. is actually an acronym that stands for being Supportive, Passionate, Involved, Creative, and Yourself. To Software Services Manager Kim Carter, Corelation's S.P.I.C.Y. values are second-nature because of her genuine passion to serve in life and in business. As Kim puts it, "I like that we are providing a service, a platform that makes things easier for the front-line teams who care about high levels of member service."

(that's what we called it back in the day)." With a family tree growing from strength, love, and resilience, she was raised to value education and persevere with positivity in times of adversity. Today, Kim values time spent with her two children and friends as well as exploring new areas in her free time. Wherever she goes, she actively seeks out opportunities for self-improvement and growth while encouraging others to do the same. Kim serves the community with her sorority Alpha Kappa Alpha Sorority, Inc. and strengthens her leadership and communication skills as an active member of Toastmasters International.

Kim received her Bachelor's in Business Administration for Computer and Information Sciences from University of Phoenix before entering the financial software industry. As an Account Manager at Star Systems, Inc., Kim had a great start in the industry by learning EFT and network services. Supporting an implementation team at CO-OP Financial Services gave her greater exposure to and appreciation for the credit union community. Kim was introduced to Corelation at CO-OP by the numerous credit unions she worked with during their conversions to KeyStone, which she heard referred to as "the cool core." After she joined the Corelation team in May 2019, Kim adapted quite comfortably to a culture she describes as "dynamic" in a company that values her strengths and challenges her to manage change and constant growth every day. She embodies that culture as she makes it a point to acknowledge her team's accomplishments and encourage them to innovate. Kim shares, "The teams I work with have made great strides in improving processes [and] on-boarding new employees. The Business Analysts added a new workflow, Reports Analysts cleaned out weeks of time in the project timeline, and Forms Development Analysts added consultative activities to help credit unions have some self-sufficiency."

Highlighting Kim's professional success only scratches the surface of a life filled with adventure, community, and gratitude for all life's opportunities. In her early life, Kim's father served as a test pilot in the Air Force, which led her family to homes in Arizona, Atlanta, California, upstate New York, Ohio, and Washington, D.C. As the daughter of one of the first African Americans to graduate from the Air Force Academy, Kim inherited a desire to live with purpose and get her hands dirty from a young age: "I was a tomboy

At Corelation, we are guided by a consistent goal to provide excellent service tailored to each client, which Kim says is accomplished by "listening to the voice of our credit unions." Kim inspires our company to take these values a step further by engaging in humble, genuine solidarity and listening to voices that have been suppressed in our community. "These are strange times, growing times, trying times, tiring times but as a person, a woman, a black woman in America, as a black woman wearing a myriad of hats and living the marathon, I am so concerned that so much is seemingly so new to so many who had blinders on—because they could. I have spent most of my life being one of the very few blacks in my schools, in my places of employment, and in my neighborhood when I bought here in '99. There is something that has to always be carried along, held up, presented when you are one of the few; there has been a certain luxury I didn't get even in my really great, blessed life." Kim works hard to be a force of positive change and encourages others to do the same. "I do hope that people in every category can and will educate themselves and stand in the tough lane, eyes wide open till change occurs that really moves us closer to a place of 'all men (and women) are created equal.'"

Kim Carter is an outstanding example of Corelation's S.P.I.C.Y. values, and really brings it home with that last word: "Yourself." Kim's capacity for growth, success, and compassion stem from gratitude, the invaluable character trait that she keeps constant in all aspects of her life. "Here's hoping that you and those you share this with strive to choose joy each and every day; there's always so much to be grateful for!" We are grateful for Kim's passion and perspective on our team. 🏆

News and Events

Client Spotlight

Congratulations to Reliant Community Federal Credit Union for being recognized as a 2020 Top Workplace in the midsize category by the Democrat and Chronicle. The award is based on an employee engagement survey taken by more than 100 organizations. Reliant has been awarded the honor for three years in a row and attributes the accolade to their thriving corporate culture, vibrant leadership, and cohesive staff. Read more at TopWorkplaces.com.

Client Spotlight

Riverfront Federal Credit Union is taking an innovative approach to their new branch with a built-in café. The open, modern layout offers robust financial services on one end and the warmth of a café setting on the other for an all-around convenient, relaxing experience. Riverfront CEO Tim McLeod is credited with envisioning the idea that grew into a collective venture. Read more at ReadingEagle.com.

Community Spotlight

Fort Bragg Federal Credit Union is doing their part to support local charities in this difficult time. The credit union recently donated over $26,000 to North Carolina charities, with recent additions including the Fayetteville Area Habitat for Humanity. Read more at CUToday.com.

Client Spotlight

Congratulations to Becky Reed, CEO of Lone Star Credit Union, who was featured on the front page of *Credit Union Magazine*. Reed shared her experience of how her strategic insight and technological aptitude that made her successful in her previous role as CIO continues to inform her leadership as CEO. Read more at CUNA.org.

Welcome, New Clients
(Through September 1, 2020)

OU Federal Credit Union
Shannon Hudzinski, President/CEO
$52 million in assets
Converting November 2021
Norman, OK

Lafayette Federal Credit Union
B. John Farmakides, President/CEO
$817 million in assets
Converting February 2022
Rockville, MD

Trius Federal Credit Union
Deanne Schriner, President/CEO
$85 million in assets
Converting September 2021
Kearney, NE

9th Annual Corelation Client Conference

October 6-7

Please mark your calendars for our upcoming event as we gather virtually to learn, network, and celebrate the credit union industry's most innovative core processing system.

Educational sessions include the latest KeyStone features, core processing efficiencies, technology roundtable discussions, and more.

Certified Partners
(Through September 1, 2020)

To learn more about our certified partners, contact us.

Acuant, Inc. . . . . acuantcorp.com
Advanced Fraud Solutions . . . . advancedfraudsolutions.com
Alogent (Formerly Bluepoint Solutions®) . . . . alogent.com
Bankjoy . . . . bankjoy.com
BillingTree® . . . . mybillingtree.com
Business Data, Inc. (BDI®) . . . . businessdatainc.com
Cash Flow Management (CFM) . . . . whycfm.com
ChannelNet . . . . channelnet.com
ClickSwitch . . . . clickswitch.com
CO-OP Financial Services . . . . co-opfs.org
Connect FSS . . . . connectfss.com
Deluxe . . . . fi.deluxe.com
Diamond Communication Solutions . . . . dmsolutions.com
Digital Insight (NCR) . . . . ncr.com
Doxim . . . . doxim.com
eCU Technology. . . . . ecutechnology.com
Elan Financial Services . . . . elanfinancialservices.com
Enacomm, Inc. . . . . enacomm.net
Entrust Datacard . . . . entrustdatacard.com
FICS® . . . . fics.com
First Line Insurance . . . . firstlineins.com
HomeCU, LLC . . . . homecu.net
Hyland Software . . . . hyland.com
IMM . . . . immonline.com
IMS . . . . cusolution.com
IMS, Inc. . . . . imsdirect.com
IMS Integration (IMSI) . . . . imsintegration.com
KeyCU Solutions, LLC **(New)** . . . . keycuso.com
Mahalo Technologies . . . . mahalobanking.com
MEA Financial Enterprises . . . . meafinancial.com
MeridianLink . . . . meridianlink.com
Millennial Vision, Inc. (MVi) . . . . mviusa.com
Payveris . . . . payveris.com
PSCU . . . . pscu.com
Pure IT Credit Union Services . . . . pureitcuso.com
SMA Technologies . . . . smatechnologies.com
Source Technologies . . . . sourcetech.com
Stickley on Security (SoS) . . . . stickleyonsecurity.com
SwitchThink Solutions . . . . switchthink.com
TeleVoice . . . . televoice.com
ToolCASE . . . . toolcase.com
Trellance . . . . trellance.com
Wescom Resources Group (WRG) . . . . wescomresources.com
Wolters Kluwer . . . . wolterskluwer.com
Worldpay from FIS . . . . worldpay.com
Wycom . . . . wycomsystems.com
Xpress Data, Inc. (XDI) . . . . xdi.com

Conversiongram

cclanton

Chris Yarnell

Jose Torres

Mickey Lyle

Teamwork at Mobility CU

Balancing Act at Vibe CU

Clear Skies Ahead at St. Cloud FCU

Backstage at Founders FCU

Reputation

Relationship

Pineapple Pals at Vibe CU

Katy Sortors (Me)

Bernard Bernardo (Host)

Donna

Lindsey Hodson

Norah St Peter

Rosanna Baluca

Mobility CU Strategizing

Clowning Around at Vibe CU

Founders FCU

Collaborating at Founders FCU

Picture Perfect at St. Cloud FCU

A Note from the President

At our core, we are a client service organization that just happens to be a software company. While industry trends and technologies continue to evolve, our unwavering dedication to service is the root of the reputation, relationships, and results that define us. This service mindset is the reason we continue to stand out in the industry year after year. You can find our passion for service in the way we adapt to your needs, develop effective tools, and embody a sense of ownership that permeates our company.

To uphold the highest standards of service, we leapt into action to adjust our plans when recent health guidelines made travel inadvisable. Our conversion strategy was quickly revisited to make the transition to remote as smooth as possible. To ensure effective communication, we implemented additional check-ins as well as dedicated video conferencing lines for key functions such as balancing and validation. Several of our clients mentioned that converting remotely was so successful they would have chosen it from the start! We also modified our technical training classes to implement secure remote access to our training machines so we could offer them online without losing any of the hands-on instruction. Lastly, we made arrangements to host our client conference remotely so we could continue our tradition of connecting and learning while protecting the health of all attendees. I am proud of our staff for rising to the challenge so we can continue to meet your needs.

As part of being an effective partner, our goal is to provide tools that make it easier than ever to recognize opportunities for improvement and anticipate needs in your credit union. With that purpose in mind, we have released eight new standard dashboards and accompanying documentation to help your staff chart your institution's performance and identify the best path forward. Whether you choose to install the dashboards in their original form or use them as a springboard to design your own custom dashboards, we hope they will serve you well for years to come.

On every level of our organization, our top priority is our service to you. A quick glance at our organizational chart will reveal that every department ends with the word "service." From our employees who assist you directly at conversion to bring your card network online to those who add a new line of code behind the scenes that makes it easier to help your members, a personal dedication to service defines everything we do. We send all of our employees to our client conference every year to help them foster a personal connection with our client and vendor partners. Our reunion will look a little different this year at our virtual conference, but our commitment to you and valued friendships are stronger than distance.

Most of all, I would like to thank you for giving us the opportunity to be a good partner to you. We know that every one of our client and vendor partners made a choice to believe in us. We are committed to honoring your trust and protecting our relationship by being agents of service every day. Service to our clients, our vendor partners, and one another will sustain us through the most difficult of times and light the way to a brighter future.

Sincerely,

Theresa

Theresa Benavidez
President/CEO, Corelation, Inc.