

# COVID-19 Reporting Package for Credit Unions

Data sheet

## Analytics and Insights to Help Your Members Mitigate COVID-19's Financial Impacts

### Challenges of COVID-19 Response

As the COVID-19 pandemic continues to evolve, credit unions have a special obligation to help members cope with the financial consequences of the crisis. These consequences might involve income disruptions, increased expenses, and even hospitalization.

Washington State and the Greater Seattle metro area were among the earliest areas impacted by COVID-19. During these early days, the chief financial officer of Sound Credit Union (SCU) identified a collection of integrated visualizations and reports that provide visibility into the ongoing impact of the pandemic to measure member behaviors, transactions, and financial flows throughout the SCU system. All 21 reports are available for use with the ibi Analytical Data Mart System (ADMS).

### Visualizations and Analytics Included With the COVID-19 Reporting Package

#### Member View

- > Member Branch Transactions by Day – Daily Bar Graph With Trend Lines
- > Member Branch Transactions by Month
- > Member Branch Transactions by Week – Weekly Bar Graph
- > Shared Branching Transactions by Branch
- > Shares Opened Last 28 Days –Daily Bar Graph

#### Card Summary

- > Card Spend Rolling 2 Months
- > Card Spend Weekly
- > Card Spend Year Over Year By Month
- > Card Spend Year Over Year by Week, Credit Cards
- > Card Spend Year Over Year by Week, Debit Cards

**>> With the right insight and data analysis, credit unions can help their members mitigate the financial consequences of the COVID-19 pandemic.**

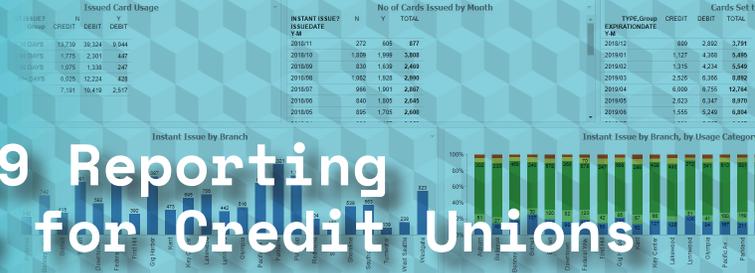
**Respond effectively to COVID-19 pandemic**

**Leverage resources to formulate your response**

**Access operational insights that impact executive leadership**

**Deliver insights throughout your organization**

**Use reports without having technical expertise**



## Cash and Deposit Analysis

- > Cash Withdrawals at Branch Locations
- > Cash Withdrawals by Branch
- > Deposit Amounts Over Rolling 6 Months – Months Chart
- > Deposit Amounts Over Rolling 6 Months – Week Chart
- > Deposit Counts Over Rolling 6 Months – Month Chart
- > Deposit Counts Over Rolling 6 Months – Week Chart
- > Unemployment Amounts
- > Unemployment Counts
- > Unemployment Monitoring

## Loan Analysis

- > Loans Opened Last 28 Days – Daily Bar Graph
- > Unemployed Loan Detail

## Solution Software Components

### Analytical Data Mart System

Designed exclusively for credit unions and their staff, ADMS provides access to powerful, visual analysis through dashboards, reports, charts, and scorecards that generate actionable business information across all departments and branches. Data load automation for Symitar Episys® keeps the data current and complete. Minimal IT staff is required to implement and maintain the solution, making it ideal for busy credit unions.

### System Requirements

- > Symitar Episys or Symitar EASE (Episys as a Service)
- > Relational database (Microsoft SQL Server preferred) for the Data Mart

## About ibi

ibi is a data and analytics company that embeds intelligence into — everything. From the beginning, ibi has known the importance of data and insights to make better decisions. We help organizations get their complex and disconnected data in order, so they can build, embed, and automate intelligence into everything they do. By preparing organizations for the future and turning them into builders – information builders – everyone can use enterprise trusted data at scale to drive their growth. Whether our customers use pre-built applications or build their own solutions for their data and analytics challenges, ibi powers their innovation and reinvention. ibi's open platform and industry-specific building blocks accelerate speed to market, improve operational efficiency, and enhance their customers' experience.

**ibi. build a better future.**

### Find out more

Visit our COVID-19 Resource Center to see videos, demos, and more.  
[ibi.com/covid](https://ibi.com/covid).



Contact us at [ibi.com](https://ibi.com) or email [askinfo@ibi.com](mailto:askinfo@ibi.com).

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