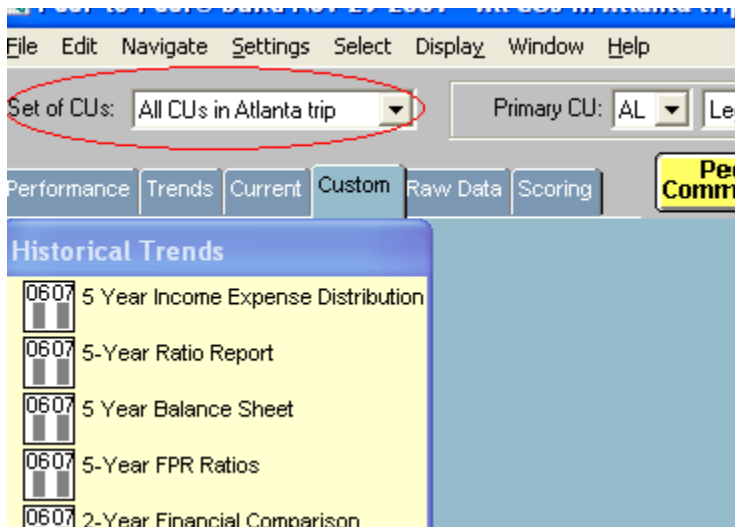


Backing Up or Sharing Custom Peer Groups with Peer to Peer 2.0:

Note: These instructions assume that the Peer Group you want to share has already been created and saved as Set within the old version of Peer to Peer. You can check to see if it's saved by looking in the Set of CUs drop down menu to see if the Set's name is present.



It's also important to keep in mind that in some instances it may be quicker to simply recreate the peer group within Peer to Peer 2.0, rather than attempt to export the list of credit unions from the old version and import them into Peer to Peer 2.0.

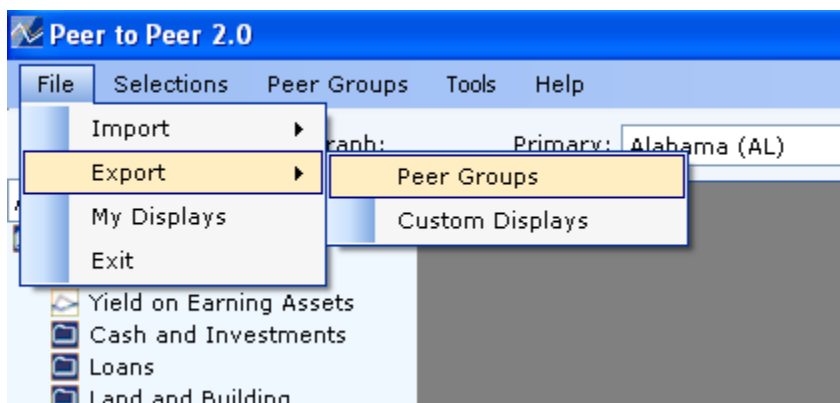
There is no batch conversion process at this time. Saved sets will need to be converted one at a time.

This process does not transfer any of the custom reports that are saved within the Custom folder on the old version of Peer to Peer. Instructions for converting those custom reports within the Custom tab are available separately.

The entire process should take about 10-15 minutes to complete.

Step by Step:

1. Within Peer to Peer 2.0, upper left hand corner of the application, select File -> Export -> Peer Groups.



2. Within the Export window, select the peer group you wish to export.

Export

Your Peer Groups

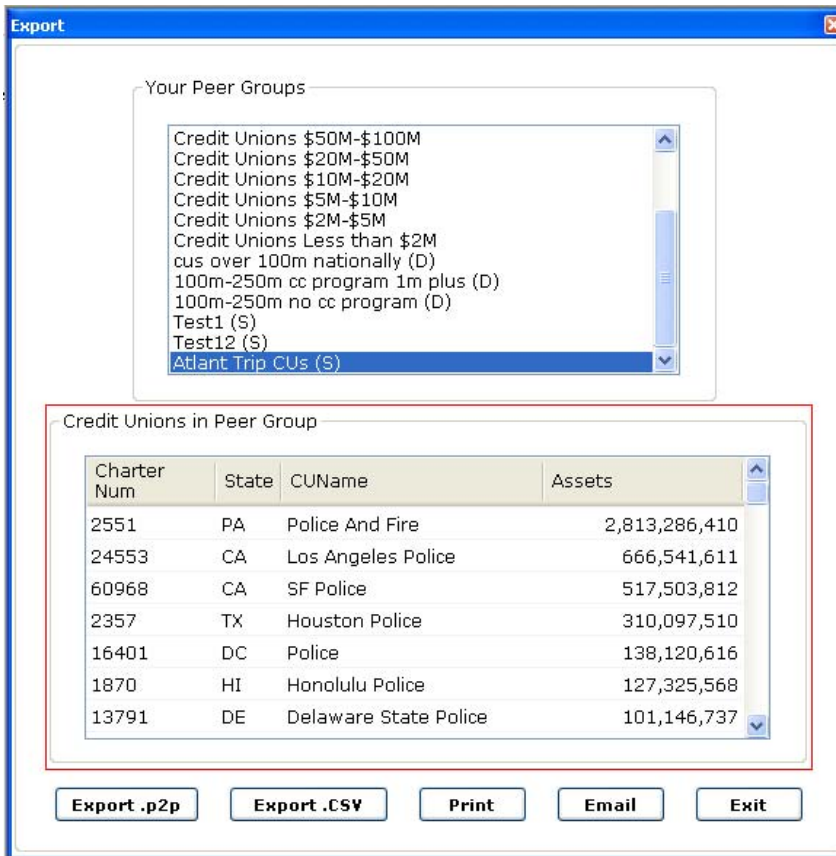
- Credit Unions \$50M-\$100M
- Credit Unions \$20M-\$50M
- Credit Unions \$10M-\$20M
- Credit Unions \$5M-\$10M
- Credit Unions \$2M-\$5M
- Credit Unions Less than \$2M
- cus over 100m nationally (D)
- 100m-250m cc program 1m plus (D)
- 100m-250m no cc program (D)
- Test1 (S)
- Test12 (S)
- Atlant Trip CUs (S)

Credit Unions in Peer Group

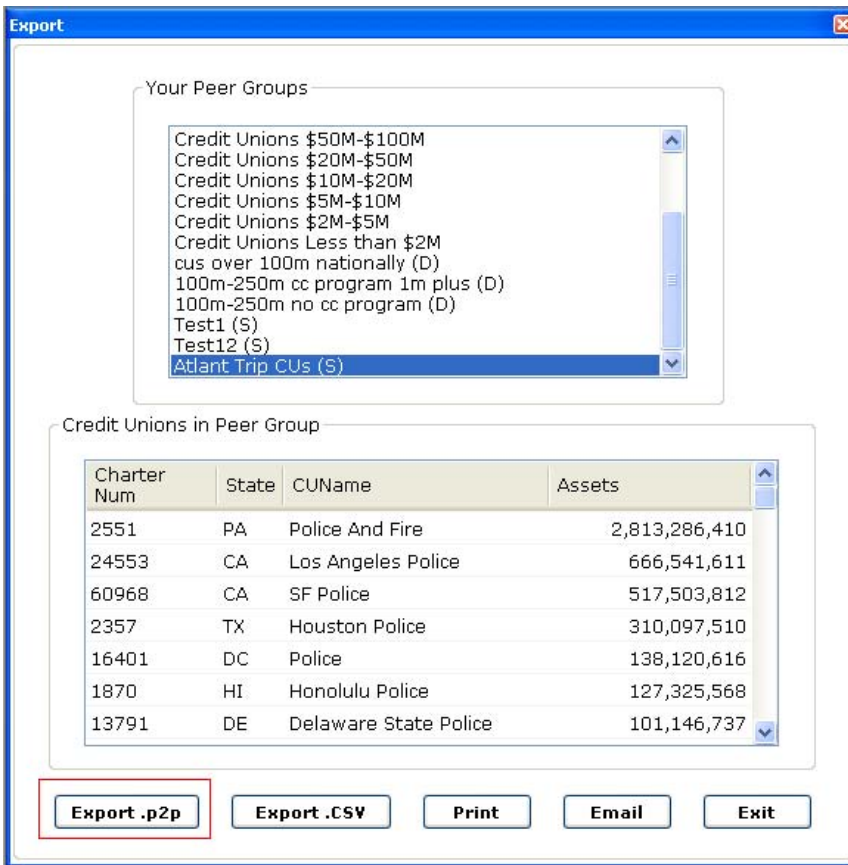
Charter Num	State	CUName	Assets
2551	PA	Police And Fire	2,813,286,410
24553	CA	Los Angeles Police	666,541,611
60968	CA	SF Police	517,503,812
2357	TX	Houston Police	310,097,510
16401	DC	Police	138,120,616
1870	HI	Honolulu Police	127,325,568
13791	DE	Delaware State Police	101,146,737

Export .p2p **Export .CSV** **Print** **Email** **Exit**

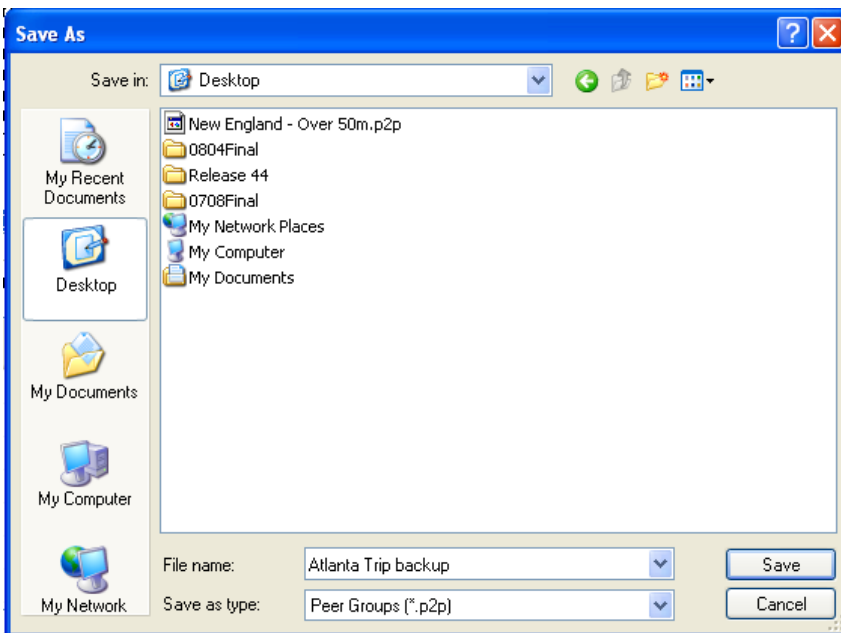
- The credit unions that are a part of that peer group for the current financial quarter will populate in the Credit Unions in Peer Group area.



- You will be able to choose the format of your export by selecting Export to .p2p or Export to .CSV. Exporting to .p2p creates one file with a .p2p extension. This option is preferable when you are trying to share your saved set with another Peer to Peer 2.0 user as the file can be easily imported into the application. Exporting to .CSV will save a file that will be compatible with Microsoft Excel and won't be imported without some modifications. The Print option will allow you to print the list of credit unions to your local or network printer. The Email option will create a .p2p file and will also open your default email application and attach the .p2p file as an attachment.
 - For purposes of this demonstration, we will select the Export to .p2p option as that's the one which provides us the most options for sharing or using as a backup.



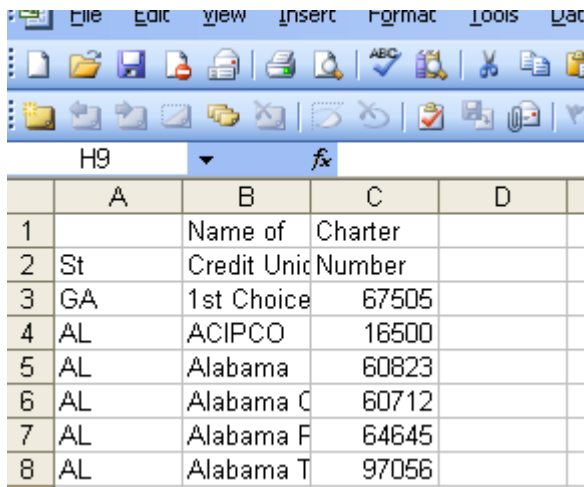
5. Within the Save As screen, select the location where you would like your .p2p file to be saved and then name your file. You should not change the default file type setting below the name box. When finished, click Save in the bottom right corner.



6. Within the Temporary Display window, right click with your mouse within the white area of the display to reveal a small menu of options. You will need to select Export Data -> Clipboard -> As Numbers. This will copy the information from your Temporary Display into the Windows Clipboard.

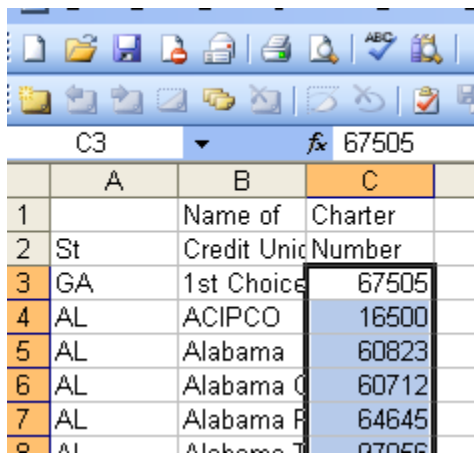
7. Open Microsoft Excel, or similar spreadsheet program, on your computer. For demonstration purposes, we'll use Excel.

8. Within a new Excel spreadsheet, paste the contents of your clipboard (control + V). You should now have a spreadsheet with 3 columns – State, Credit Union Name, and Charter Number.



	A	B	C	D
1		Name of	Charter	
2	St	Credit Union	Number	
3	GA	1st Choice	67505	
4	AL	ACIPCO	16500	
5	AL	Alabama	60823	
6	AL	Alabama C	60712	
7	AL	Alabama F	64645	
8	AL	Alabama T	97056	

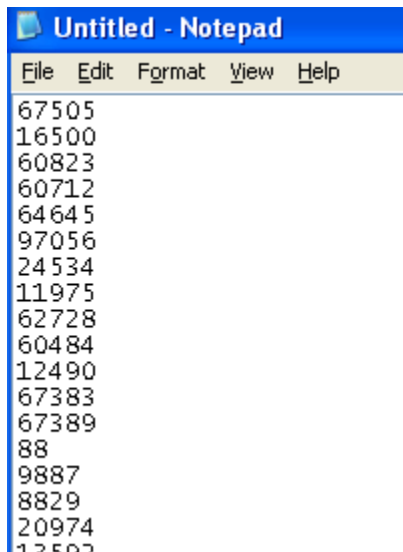
9. Within Excel, you'll need to copy the column of Charter Numbers. It's important that you copy only the numbers and not the Column Header name or the totals and averages rows at the bottom of the display.



	A	B	C
1		Name of	Charter
2	St	Credit Union	Number
3	GA	1st Choice	67505
4	AL	ACIPCO	16500
5	AL	Alabama	60823
6	AL	Alabama C	60712
7	AL	Alabama F	64645
8	AL	Alabama T	97056

10. Open a word processing application on your desktop. The goal is to create a .txt file containing a single column of Charter Numbers which were copied from your Excel spreadsheet. You can access the free word processing application, Notepad, found on Windows desktops by clicking Start -> All Programs -> Accessories -> Notepad.

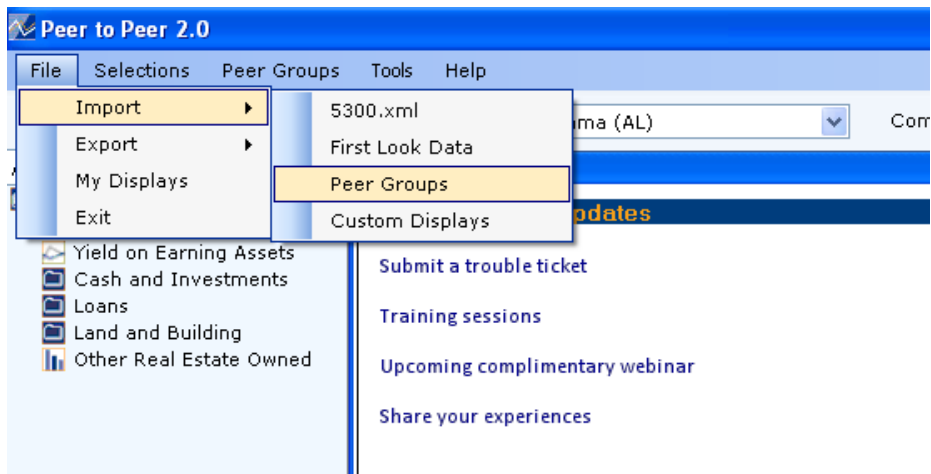
11. Paste the Charter Numbers into Notepad (or similar word processing application).



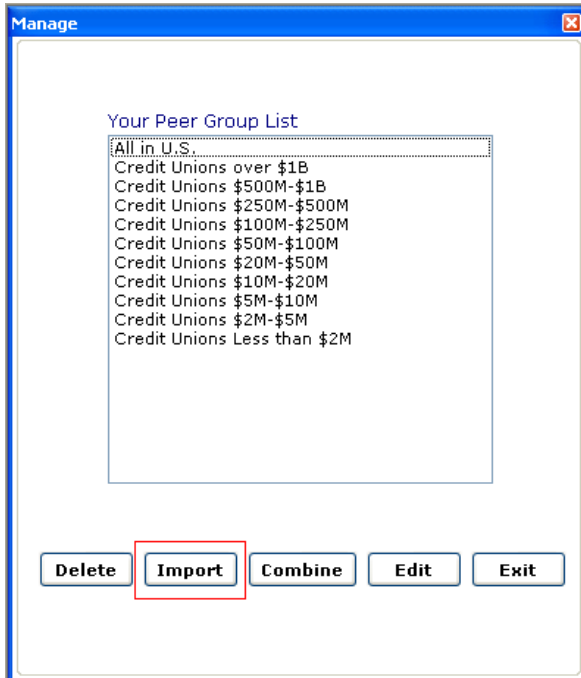
12. Save the file using any name you'd like, making sure that the file is in .txt format. Saving the .txt file to a network folder can make the sharing easier. You can also save the file to your desktop and email the .txt file to the other Peer to Peer user.

13. Open Peer to Peer 2.0. It is not necessary to close the old version of Peer to Peer but you can if you prefer.

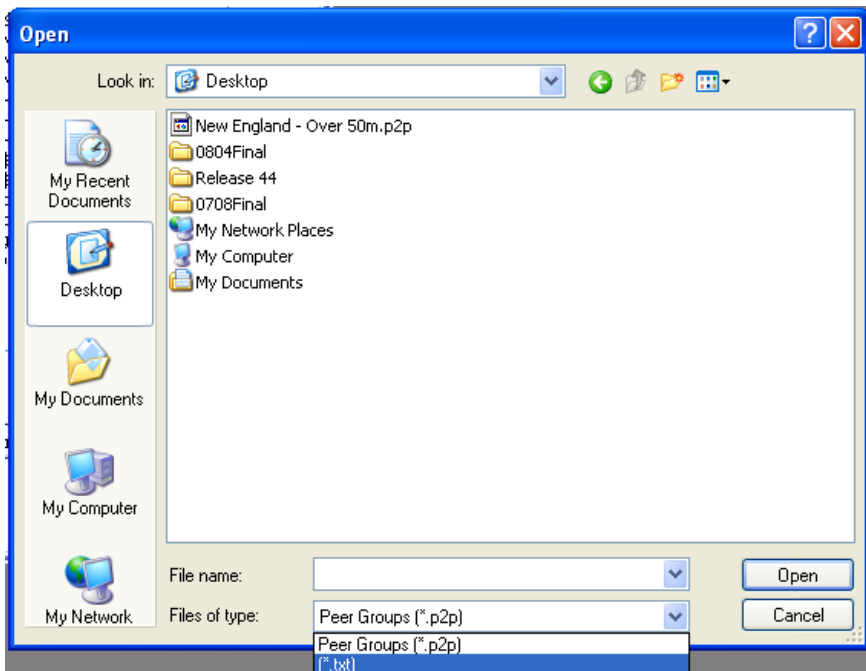
14. From the main navigation screen of Peer to Peer 2.0, select from the upper left hand corner File -> Import -> Peer Groups.



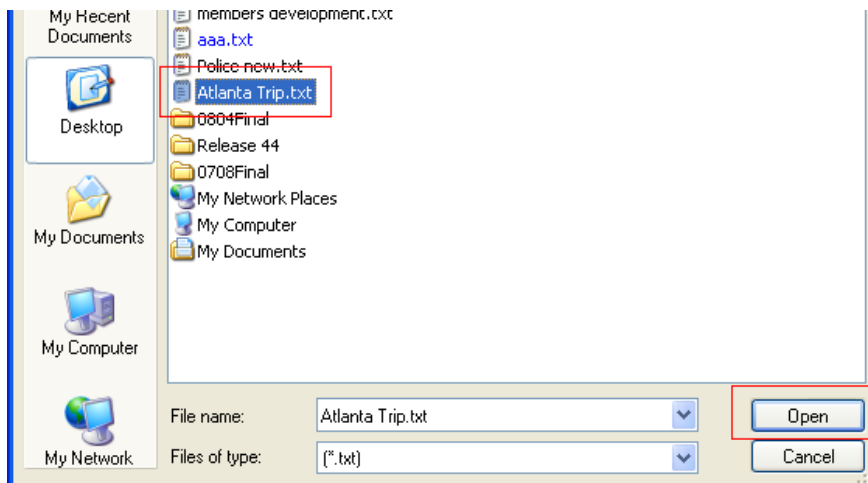
15. From within the Manage window, select Import.



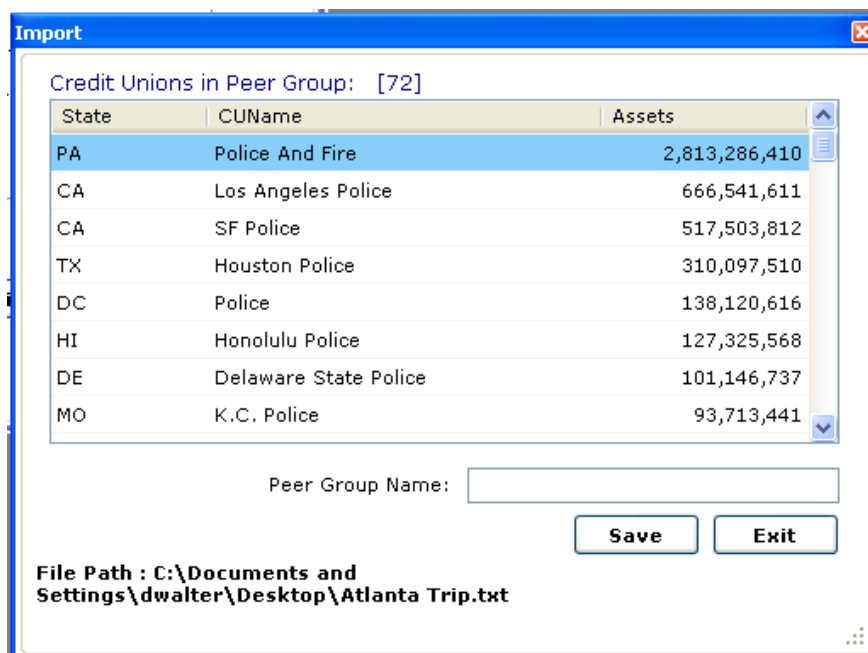
16. From within the Open window, first change the Files of type setting to .txt. The default is .p2p and is used for sharing custom peer groups easily between users of Peer to Peer 2.0.



17. Next, locate the .txt file which contains the list of charter numbers from your previous peer group, highlight the file and select Open.



18. The Import window will present you with the list of credit unions the software found from your .txt list. You will have the option to either name and save the list as it is presented, or you can click Edit to add or remove credit unions.



19. You can now Exit from the Manage window and begin using your peer group within Peer to Peer 2.0.

If you have any questions about these instructions or would like to have a Software Support Representative from Callahan & Associates help you through this process, please call 800.446.7453 or email: p2p@creditunions.com