Quick Start Guide

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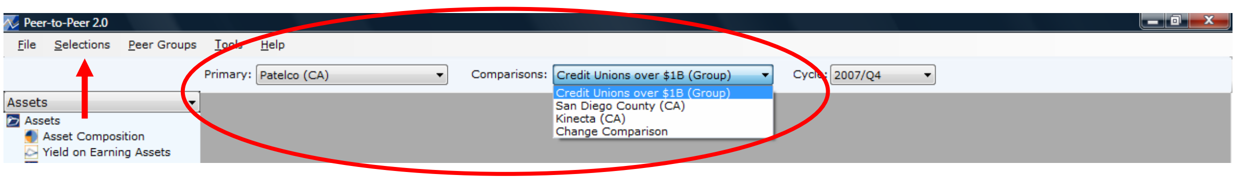
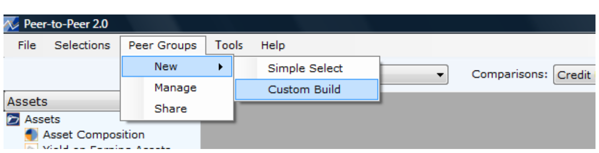
Thank you for working with Peer to Peer 2.0! We hope you will offer your candid assessment of this powerful new version of Callahan's Peer to Peer software. In order to make the most of your test-run, we invite you to try the following features of Peer 2.0.

1. The first screen you will see is an RSS feed from Callahan. Here, we will post any software updates you may need; communications from other members of the Peer Community; recent headlines from CreditUnions.com and upcoming events that may inspire new ideas! Keep your eye on the **Peer 2.0 Updates** box in particular!

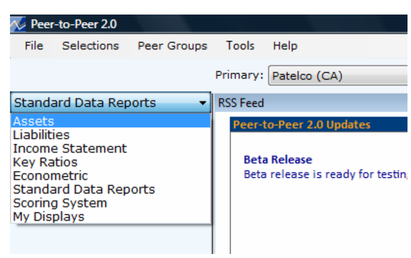
2. Peer 2.0 is designed for **multiple comparisons**: CU vs. CU, CU vs. Peer Groups, Peer Groups vs. Peer Groups, many CUs vs. many Peer Groups etc. Your comparisons are always visible at the top of your screen and can be controlled from there or from the Selections menu.



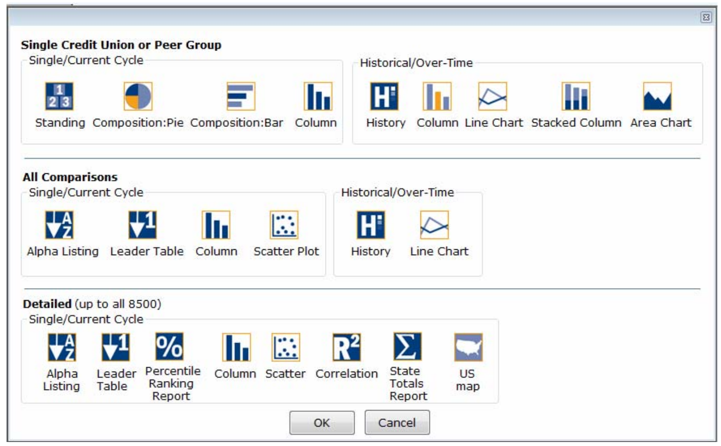
3. While we've included a dozen asset-based peer groups to speed your analysis, we encourage you to try your hand at **Creating Custom Peer Groups**. A peer group displays the weighted average performance of all credit unions you select and are saved for your use anytime you open Peer 2.0 . Start with the Peer Groups menu, select Custom Build, and walk through the 5-step process for selecting credit unions. Or, you can hand select a peer group using Simple Select.



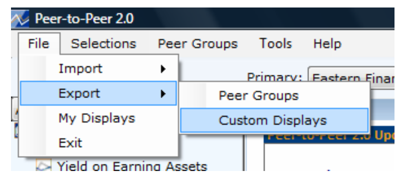
4. **Explore the built-in displays** – there are over 225! The **credit union** performance displays are (currently) organized in 6 folders, plus one for econometric data (not yet available) and one for your own custom displays (see more on Tip 5). We admit—these need



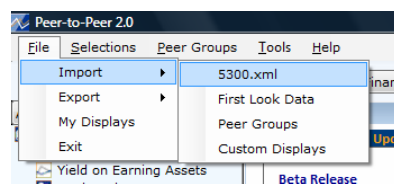
some better organization and naming—any suggestions are welcome!



5. If you want to delve deeper into some area of performance beyond those in our built-in displays, you can build your own using the **My Displays** option on the left navigation. For Original Peer users, the functionality will be familiar—select a type of graph, then specify which data to include. For new Peer users, further explanation is available in **Appendix A**.



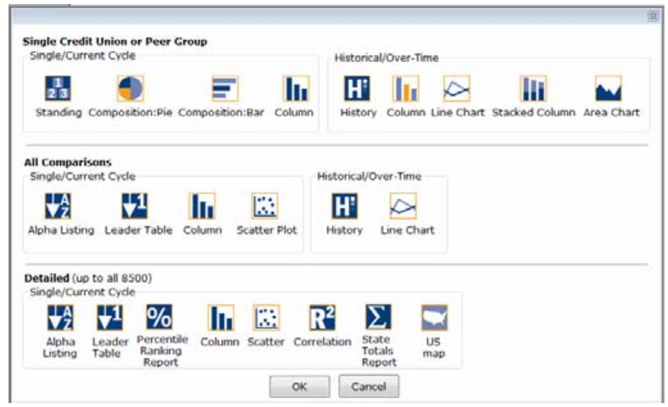
6. **Collaborate!** Peer 2.0 is built around the concept of collaboration. You can export your peer groups or custom graphs for other Peer Users to use; export the graphs to Excel or PowerPoint; or cut and paste into any other program. We would love see what you've created, so please email your peer groups or custom charts to p2p2.0@creditunions.com (use the File → Export menu option)



7. You will be able to download a program update that will modify the database and make it ready to accept 1st Quarter data. Then, you can directly **upload your own 1st Quarter 5300.xml** as soon as it's ready to begin your own performance assessments. As other credit unions' submit their 5300 files to us, we will turn around and make this data available to you as well.

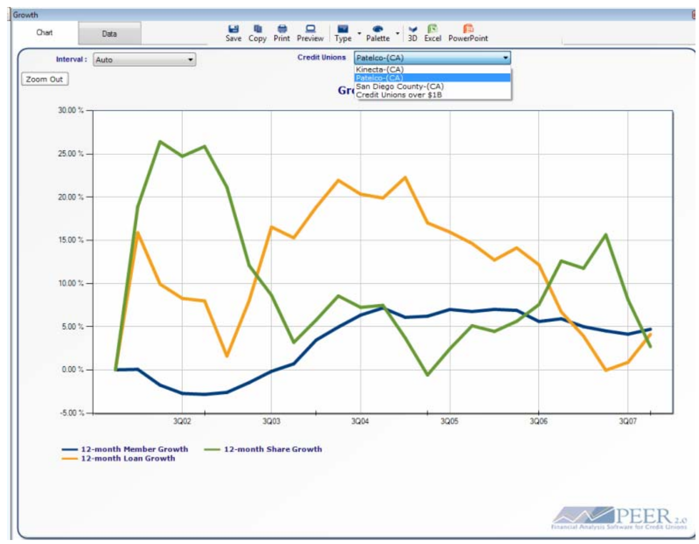
Appendix A – Creating Custom Graphs

Learning to build custom graphs takes a bit of practice, but once you're familiar with the program, it should come easily! The first step is deciding what type of graph you want, and then choose the appropriate accounts to display.



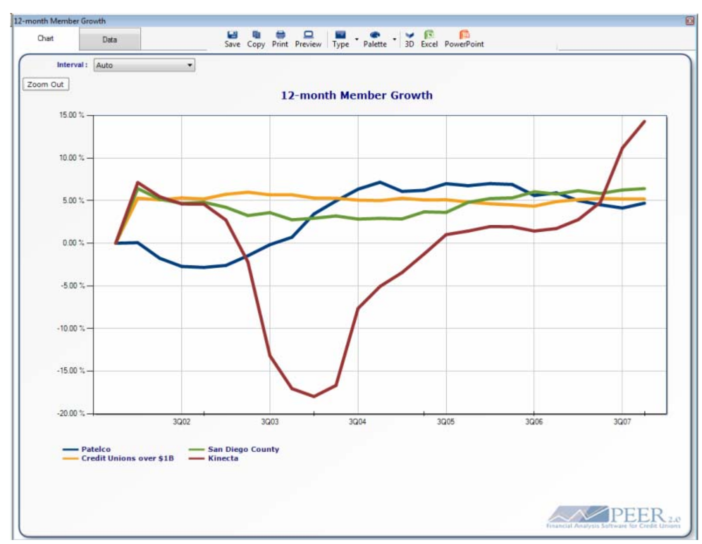
Step 1. The graph types are divided into 3 groups. We provide a brief description and an example or two of each below:

Single credit union or peer group:



These graphs, tables and reports allow you to view a single entity's performance, usually over a period of time (the composition graphs are point in time of course, as is the Standing Report). The example on the right plots three data points (member, share, and loan growth) historically for the primary credit union. You can switch to your other comparisons using the dropdown menu on the graph.

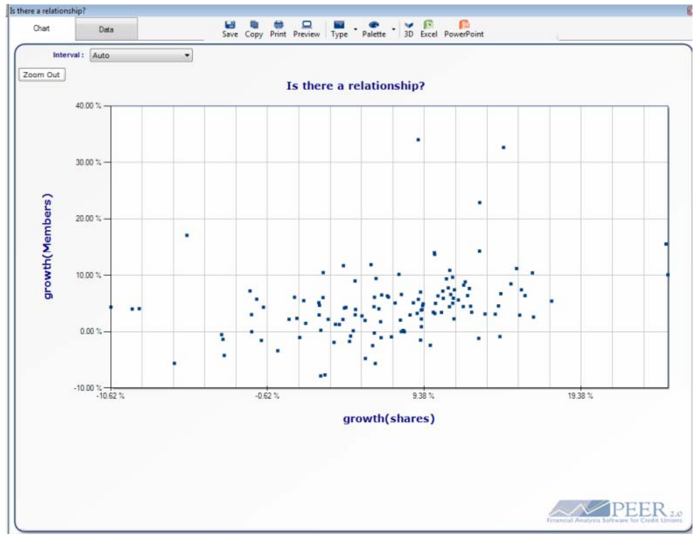
All Comparisons



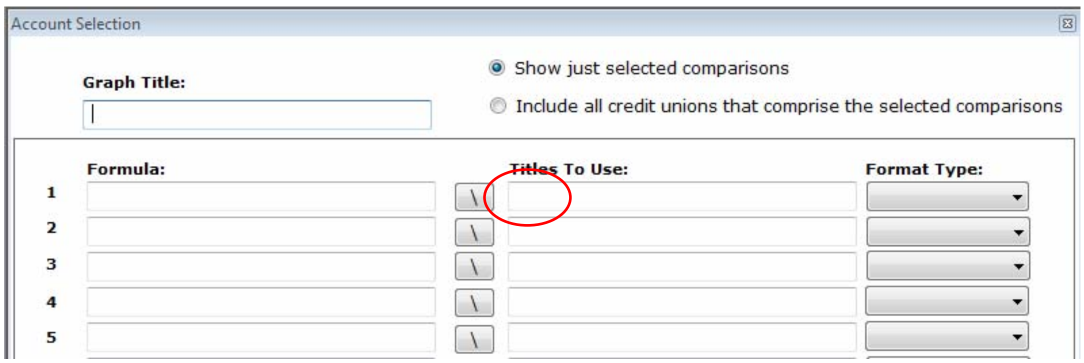
These graph types are meant to compare performance across different entities. In the example to the right, each line represents a different entity (3 credit unions and 1 peer group in this case) for a single data point (Member Growth). The graphs will display a line or bar for each entity in your comparison set.

Detailed

These graphs will display the performance of all credit unions within your comparison set individually. This means, if you have a peer group, these graphs will treat all the credit unions within those peer groups individually. This example shows a scatter plot of Member Growth vs. Share Growth for all credit unions in my comparison set.

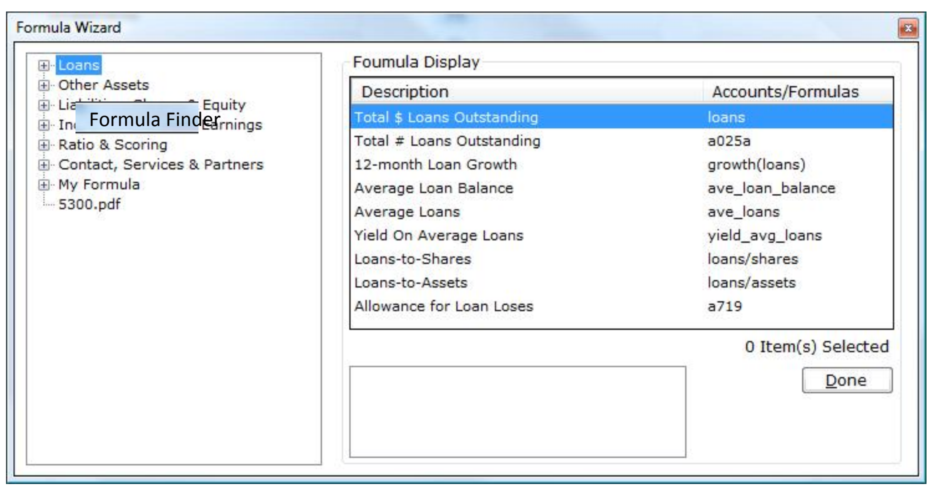


Step 2. Once you have chosen what type of graph, table or chart you want, you need to learn how to navigate the Account Selection



screen. You can input any 5300 account code using an "a" in front. So, total assets = a010. There are also dozens of fields available only through Peer to Peer(3rd party suppliers, executives).

Rather than memorizing all these codes, we've created a Formula Finder. Get there by clicking on the funny icon in the middle of the Account Selection screen. This tool contains the most commonly used fields from the 5300 Call Report as well as



hundreds of pre-programmed formulas. We also provide a link to the latest 5300.pdf so if you are more comfortable locating account codes on the NCUA form, you can do so. Double click on any account on the right and they will be added in order to the Account Selection screen.

What's New

Wow #1!

Multiple comparisons made easy!! Any graph, table or chart can have multiple credit unions or peer groups for maximum analysis power. Chose whatever combination you want and save them for future use.

Wow #2!

Easily build and preview Peer Groups to include on any table or chart. Walk through an intuitive step-by-step Custom Build process, or handpick a group using Simple Select. Tell Peer to update these groups automatically or save them permanently.

Wow #3!

The minute you send your 5300.xml to NCUA, you can start your analysis by uploading directly to Peer. You can also upload anyone else's 5300.xml so share with your colleagues at different institutions!

Wow #4!

Collaborate! Share peer groups and custom graphs using our easy export features so you can share insights with others within your credit union. Coming soon: Post your graphs on the peer community website!

Wow #5!

Great graphics with sophisticated color schemes to give your presentations an extra splash of professionalism! Or, customize and save your own color palette to