

NCUA

5300 QUARTERLY CALL REPORTS



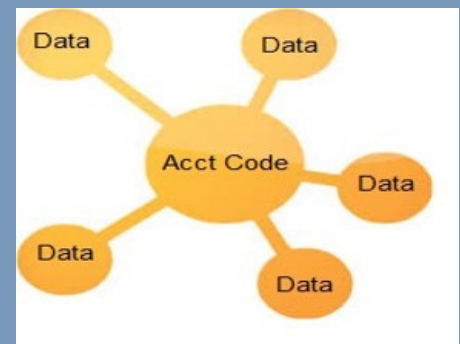
The Challenge

- Creation of the 5300 Call reports is often a tedious and complex manual process involving several individuals from different functional areas of a Credit Union.
- Integrate, manipulate and prepare all data from reports - outside the core, in multiple formats, including PDFs, XMLs, CSVX and PRNs into a common report format.

1 The Solution – 5300CR

Mapping Data

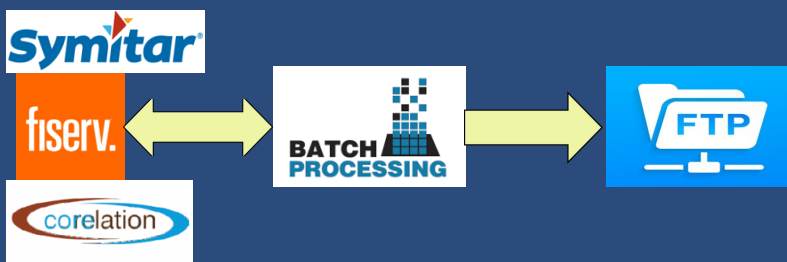
Identify the GL CODEs / Share Types / Loan Types for each of the Account Code mentioned in the 5300 Call Report format as provided by NCUA



3 The Solution – 5300CR

Extract Data

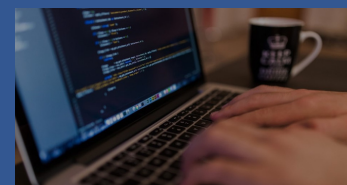
Run the set of Extraction Routines through a Batch Process for the necessary extracted data, which is then FTPed to a secured cloud folder.



2 The Solution – 5300CR

Extraction of Relevant Data points

Create a set of extraction routines with the necessary GL CODE / Loan Types / Share Types values for each of the mapped Account Code from the 5300 Call Report.



4 The Solution – 5300CR

Import Data and Build Reports

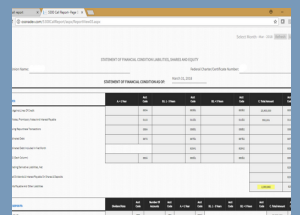
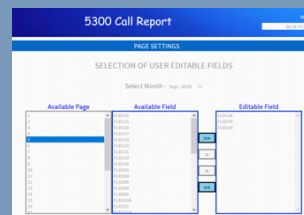
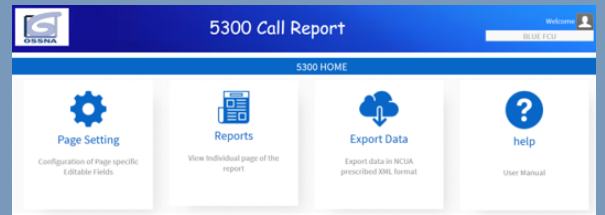
Import the extracted Data Elements in the required SQL DB for building the reports.



5 The Solution – 5300CR

Review the 5300 Call Reports

Review the 5300 Call Reports. Edit any field to make the necessary changes. Confirm changes and export



Compelling Benefits - Saves Time and Money



Next Steps

How about a pilot ?



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