



# CALLAHAN PEER-TO-PEER DATA UPLOAD TOOL

The Peer-to-Peer Data Upload Tool allows users to upload and view data *beyond* what is available on the NCUA 5300 call report.

Once this data is available, Peer-to-Peer users will be able to:

- Visualize and track historical trends in a growing list of different, non-publicly reported metrics.
- Benchmark these trends against peers, allowing for a comparative analysis of what is working, what isn't, and where adjustments can be made.

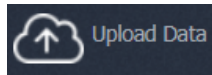
## UPLOADING DATA

To gain access to Callahan's extended library of data, we ask that you please first upload data from your own institution.

Once you have uploaded your data, you will be able to review your institution's metrics *and* track them over time through Peer-to-Peer's user-friendly interface. You will also unlock the full industry-wide version of this dataset, allowing you to benchmark against an ever-growing list of your credit union peers. As more institutions upload their information, your benchmarking capabilities for these newly uploaded metrics will expand.

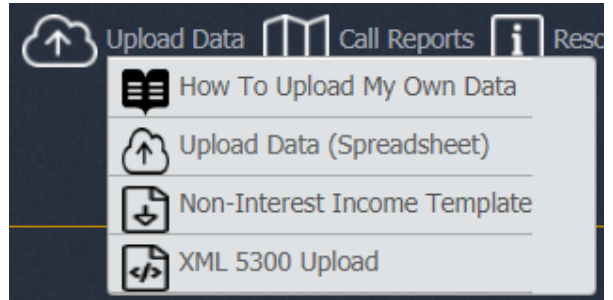
### HOW TO UPLOAD MY DATA

Everything you need to upload your institution's data is located in the **Upload Data** section of the top menu in Peer-to-Peer.



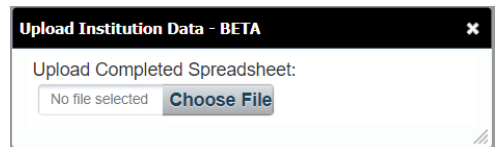
In order to upload any of the datasets available within this tool, you will first need to complete the relevant template (in Excel format). These templates are available for download in Peer-to-Peer.

1. Click on the **Upload Data** icon, shown above.
2. In the dropdown menu, select the option for the **Template** related to your desired data set (Example: **Non-Interest Income Template**). All templates will have a **download arrow icon**.
3. Download the Excel template. The instructions provided on the first tab of the Excel file will guide you through the process of filling out the template.
4. Once you have entered all of your data and completed the template, save the file to your computer. Be sure to save the file to a location that you will be able to find again later.



To upload your data, return to Peer-to-Peer.

1. Click on the **Upload Data** icon from the top menu.
2. Select the **Upload Data (Spreadsheet)** option from the dropdown window. The upload option has an **upward arrow icon**.
3. In the **Upload Institution Data** pop-up window, select **Choose File**, locate your saved template from your computer's drive, and upload the dataset.
4. Once Peer-to-Peer has accepted your new data, a **New Account Values** window will appear. Review the values listed in this window to confirm that the data is correct. When you are ready, select **Upload**.
5. Select **OK** on the confirmation window. Your dataset is now available in Peer-to-Peer!



### OTHER NOTES

1. Various datasets report at different frequencies (e.g. monthly vs. quarterly). Explore the **Cycle** and **Chart Options** areas in Peer-to-Peer to change the frequency and date range shown in your displays.
2. The tool assigns the new data to unique **account codes**, which are listed in **Column A** of the Excel template. Refer to these codes to create new and custom displays in Peer-to-Peer. These codes are also searchable in the **Formula Wizard**.