

Volume 2011, Issue 1
January 2011

UltraData Happenings:

- **HAPPY 2011!!!**
- **UltraData® Users' Group Executive Board meeting will be held January in Pleasanton, CA**
- **New website: www.udusers.org**
- **New Board Members**



President's Message

I'd like a Mulligan, please. For those of you that aren't afflicted with the game of golf, a Mulligan is an extra shot, one that you take after you hit your ball into one of the many unplayable places on a golf course (if your Mulligan ends up being worse than your original shot, and you decide to just forego the second hit, that's called a Finnegan – a completely different type of rule bending). But, I digress...I want a Mulligan for 2010. I just sort of feel like if I had another shot at 2010, maybe I could get a few things to shake out differently.

To be fair, I'm not sure any of us could do a lot of what we did in 2010 differently and expect a better result. We didn't have much control over some of the major impact factors – the corporate stabilization, fund assessments, and sluggish economy. Oh, and I'm sure that quantitative easing will have some impact on us when we figure out exactly what it's quantitatively easing, which we may discover is simply a cool sounding phrase for making sure we have extra debt to pay off on those rainy days when things have started to look up...but here I go again, off the subject.

So from a Credit Union management perspective, maybe a Mulligan isn't a great thing. But your Executive Committee would certainly like one for 2010. We pushed, and we would like to think that we pushed hard, to get some new educational opportunities in place for the user community at large. We didn't have great success, although we certainly did succeed in offering some Credit Unions that wouldn't have otherwise been able to join us at Connections a chance to come out to attend...or come down to attend, depending on your location. We're teeing up another shot for this year. We met with Harland in January, and one item on the agenda for that meeting was educational and training opportunities. Here's to new stuff in 2011!! – and we're hoping this second shot doesn't wind up in the sand trap.

Jeff Walter
President

Annual Meeting

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January 2011 Meeting with UltraData

The UltraData Users' Group Executive Board will be meeting during January 2011 in Pleasanton, CA. We will be meeting with many of the key managers of the UltraData team. The Executive Board would like to get some input from the user group. We will be sending out a survey to get some feedback from users. Please watch for this important survey!

UD Users' Web Site

The new web site that the Executive Committee rolled out last year allows multiple employees of your Credit Union to sign in and enroll to get updates from the UD Users' Group. Please make sure the managers at your Credit Union have logged into our web site and signed up for updates. Our website is www.udusers.org



Treasurer's Corner

Membership Dues invoices were mailed out at the end of December for 2011 dues. For those Credit Unions who have already paid, thank you!

In lieu of requesting contacts via the renewal invoice (as we have in the past), we ask that upon paying dues that you have all Credit Union employees wishing to be on the group's contact list enroll for access to our web site at www.udusers.com. Doing so will automatically populate them to our email contact list. Our old web site limited us to having only one contact per credit union so we want to be sure all of your employees have access to the new website and it's resources.

**Income & Expenses
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<u>Income:</u>	
Annual Dues	\$ 40,250
Discount for New Members	(1,050)
Discount for Connections Sponsor	(1,050)
Vendors—Website Advertising	2,800
Vendors—Connections Network	5,850
Interest Income	<u>6,594</u>
Total Income	\$ 53,394
<u>Expenses:</u>	
Connections – Misc Exp	\$ 3,077
Connections – Outing Exp	18,109
Connections – Scholarships	2,195
Incentives & Gifts Given	936
Postage	334
Travel – Connections	5,992
Travel – Quarterly Exec Board	4,523
Website – Design & Maintenance	2,031
Website – Hosting	<u>237</u>
Total Expenses	\$ 37,434
Net Income over Expenses	\$ 15,960

As a reminder to those who have not yet paid their 2011 dues, we remove UltraData Users' Group web site access for non-payment after February 15th of each year.



If you have any questions about your credit union's dues or the financial information provided, please email Linda Conway at treasurer@udusers.com.

Welcome Jim Daly...

As a newly appointed member of the Ultra Data Users' Group Executive Committee, I see our role as one that acts as a liaison between the credit union community and UltraData.

This partnership is essential to help bring products and services to the market place that will benefit both parties, and more importantly, our membership. While the credit unions that make up this users' group may vary in size and scope, a strong partnership with our core vendor is essential for everyone's continued success.

Being an employee with Diamond Credit Union as the V/P of Information Technology, I've been fortunate to work with the UltraData system as both a hands-on operational tool user as well as a strategic end user for 10 years.

Additional working experience in a service bureau institution has provided additional insight into the core system. These collective experiences have formulated the background that is

necessary to fulfill a position on the Executive Committee and advance the needs of the UltraData users.

I look forward to working with everyone on the Committee and with the credit unions that make up this group in the future.

Jim Daly
Diamond Credit Union
V/P of Information Technology



Welcome Karen Taney...

Hi, I'm Karen Taney from GEICO FCU in Washington D.C. I am excited about serving as a board member on the UltraData Users' Group Executive Committee.

My experience in the financial industry working at banks and credit unions, as well as my past experience working at Harland, make me well suited to serve as a board member. Both help me to have a unique understanding of where the committee may be able to make an impact for its members. Professionally, I look at things from a strategic technology and management perspective, with my interests focusing on obtaining the best of breed products for the least cost while ensuring a secure environment for our data. Personally, I think a sense of humor with most doses of communication is the key to great collaborative efforts.

My vision is to work with the other committee members in communicating to Harland our Users Group members' needs. I also want to make sure that the members of the Users Group are aware of collaboration opportunities and resources to help utilize their Harland products to optimize their credit union offerings.

Thanks to all who voted for and elected me, I will strive to make a difference in these next three years for the committee and the members of the UltraData Users' Group.

Karen Taney
AVP Information Technology
GEICO Federal Credit Union



GEICO Federal Credit Union

Welcome Rhonda Coleman...

Hello, I am Rhonda Coleman from CP Federal Credit Union in Jackson, Michigan and I am looking forward to serving others as a member of the UltraData Users' Group board.

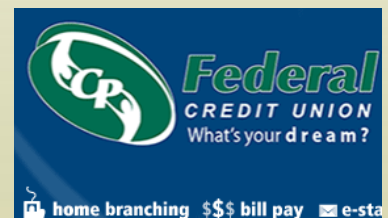
Personally, my life centers around the people I love... my family, friends, coworkers, my members and my community. My family is my life. I love doing family outings such as (kayaking, camping, fishing, traveling, bonfires just to name a few). But....my passion in life is cooking. When I am cooking is when

I am my happiest. I think I love to cook because food brings people together, makes them feel loved and happy.

Professionally, I have worked in several different positions within the financial field for over twenty five years. I started as a teller and worked my way to Director of Branch Operations until the new position was created; Operation Service Consultant and I found my niche. I work to bridge Operations and IT department. My experience

working in the different departments and dealing with the issues of each department has been priceless in gaining the knowledge I need as an Operations Service Consultant.

Rhonda Coleman
CP Federal Credit Union
Operation Services Consultant



We're on the web!
www.udusers.com



It's In There!

One of your best resources to keep track of all things UltraData is the web, and there's so much out there that if you haven't visited the UltraData System website lately, you need to go and take a look! Here are a few of the items that you can find at the click of a mouse:

Advocacy Services Metrics can be found at <https://www.ultradasystem.com/Customer/support/metrics.asp>. Each month Advocacy Services posts how they are doing on specific measures such as Service Level Objectives, time to answer, outstanding case load, and other vital areas. Check it out to see how your team is doing.

The Quick Reference Guide is available at <https://www.ultradasystem.com/Customer/support/qrq.asp>. This guide has the Hours of Operation, Holiday Schedule, Contact information for Advocacy Services team members, supervisors, management, after hours support numbers and also Service Level Objective explanations.

Release notes and upgrade documentation can be found at <https://www.ultradasystem.com/Customer/support/patch/softwareindex.asp>. Follow this link for all of the available releases and documentation for each.

COMING SOON: The new Knowledge Management System. Advocacy Services has been working on their new knowledge management system for nearly 12 months. During this time existing articles have been reformatted and verified for accuracy and usefulness and new knowledge articles have been created. The knowledge management system houses over 3000 articles. Watch for an e-mail inviting you to training. The system is designed to present you with answers as you log your issue using our Customer Interaction System.

Executive Committee



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Todd Erickson, Vice President
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dalyj@diamondcu.com



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