OPCON

CoVantage Credit Union

Managing by exception with OpCon

Increasing Productivity and Reducing Manual Errors

CoVantage is one of the top credit unions in the U.S. when it comes to providing financial benefits to its 85,000-plus members in Northern Wisconsin and Michigan. Using a well-known competitor to SMA Solutions, the 12-member IT department at CoVantage often had to wait for other users to give the approval to initiate certain jobs. This wasted many man-hours across several departments. Using Symitar® Episys® and OpCon™ from SMA Solutions, the IT department no longer needs to monitor processes and automation systems 24/7. OpCon makes it possible for the IT department to manage the credit union's transactions as well as its 300 desktops, 200-server data center and a failover site.

CoVantage
CREDIT UNION

CoVantage Credit Union operates multiple full-service branches across Northern Wisconsin and Michigan

- AIX and Windows
- 300 employees
- 12 IT staff members
- 600 processes run per day
- $1.2 billion in member assets

CHALLENGE	SOLUTION	BENEFITS
Many IT man-hours wasted waiting for end users to approve job initiation	OpCon allows users outside of IT to approve these processes within Episys or Self Service	CoVantage now focuses more on member service than monitoring its phone and inbox for scheduling issues
CoVantage's holiday schedule was different from that of federal holidays	OpCon accommodates multiple custom-defined automation schedules	User-defined requirements allow for custom process automation, even when IT support is not available
AIX™ time-based schedulers could not control Windows™, resulting in unnecessary buffer time between jobs	OpCon can control many different platforms and products, including AIX and Windows	Operators no longer need to schedule time between processes, meaning operating time is greatly reduced

> "People inside the credit union as well as customers outside have noticed and complimented us on the improvement in service."

Joni Van Ooyen Assistant Vice President, Information Systems

Improving Customer Service without Adding Staff

Before installing OpCon, a CoVantage staff member had to constantly monitor the IT phone and inbox to ensure that irregular processes were completed. Since adopting OpCon in early 2013, CoVantage has been able to automate virtually all of its IT operations.

"Instead of constantly babysitting systems, we can focus on higher-value projects and manage by exception."

Brad Van Doorf Information Systems Programmer

Users can initiate irregularly scheduled processes themselves, without IT staff needing to intervene. OpCon helps the CoVantage IT staff efficiently manage everything from unique user requests to server maintenance.

"Before OpCon, we also spent a lot of time flowing data to and from vendors' secure FTP sites. We had a full-time employee dedicated to this task because of all the manual intervention required. Now, OpCon handles the file transfers in a lot less time," said Joni Van Ooyen, Assistant Vice President of Information Systems.

Multiple Platforms, Multiple Schedules

CoVantage runs on two different platforms – Windows and AIX. The credit union uses Episys for core processing and tried to automate processes with a competitor's time-based scheduler running on AIX. Unfortunately, the AIX scheduler could not control processes running on Windows-based servers. If a Windows process did not complete before a second

one on AIX began, data could be corrupted. Time had to be scheduled between processes to prevent overlapping. This undercut efficiency and delayed the posting of members' account information.

To complicate things further, CoVantage and the Federal Reserve System have different holiday calendars. The competitor's scheduler could not be programmed to recognize the difference. With OpCon, multiple automation instances, custom workdays and dependency-based processes are easy to maintain.

SAVED MONEY • INCREASED ACCURACY • SAVED TIME

Irregularities No Longer a Threat

Since installing OpCon, CoVantage's irregular processes, multiple platforms and multiple automation processes no longer pose issues. The group boasts 600 processes per day with no manual errors.

The ability of OpCon to manage a variety of platforms and recognize dependencies between processes on each makes it exceptionally versatile.

"With OpCon, daily, monthly and year-end processing go much more smoothly. We process files in a timelier fashion. People inside the credit union as well as members outside have noticed and complimented us on the improvement in service," Van Ooyen said. "We'd never go back to the way we did things before."