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Oregon State Credit Union

Oregon State Credit Union was founded in 1954 on the campus of Oregon State College (now Oregon State University). Like many credit union origin stories, Oregon State's began with a shoebox and $25.

Bob Coyle, an associate professor of agriculture, started the Credit Union to serve the needs of the institution's faculty, staff and families, and managed the cooperative from his small academic office.

Fast forward almost 70 years, and Oregon State Credit Union converted from a federal to a state charter, allowing the cooperative to serve anyone who lives or works in 24 counties in western and central Oregon. The credit union currently serves over 134,000 members through 15 branches and offers a full range of services, including personal and business accounts, home and auto loans, commercial and business loans, credit cards, and investments and insurance services.

Oregon State Credit Union

Oregon State Credit Union, a state-chartered credit union, was founded in 1954 on the campus of Oregon State College (now Oregon State University).

- Headquarters Corvallis, OR
- Assets $2.2 billion (as of March 31, 2022)
- Serves 134,233 members

CHALLENGE

Oregon State Credit Union planned a major conversion to the Corelation KeyStone core banking system in the 2016-2017 timeframe. Erik Lubbock, Director of Core Applications Services and his staff of three administrators and four analysts were already very comfortable with automation, as the Credit Union had first automated its core processes in 2003. Lubbock sought to identify a leading workload automation solution that would integrate seamlessly with KeyStone and provide the same level of automation they were used to.

CHALLENGE	SOLUTION	BENEFITS
Oregon State CU sought to improve its core system processes with a workload automation solution that would: • Integrate seamlessly with the Corelation KeyStone core system • Reduce processing time • Eliminate manual errors • Provide easy, stress-free database maintenance • Offer scalability to grow with the business	Oregon State CU used OpCon from SMA Technologies, a workload automation solution that offers enterprise-level functionality and scalability without the complexity, to automate its core system processes.	OpCon empowered Oregon State CU to: • Automate all core processes • Achieve significant time savings • Reassign staff to higher-value tasks • Ensure compliance with regulatory requirements • Realize scalability beyond the core

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Like many credit unions, Oregon State CU had limited staff and resources, and needed to implement efficiencies wherever it can. With the Credit Union's prior automation solution, database maintenance was a challenge. Lubbock and his team needed to identify a workload automation solution that would make maintenance easy and stress-free.

Lubbock also sought a workload automation solution that offered scalability, and could grow alongside the Credit Union over time.

JOURNEY

Constrained by the strict project timelines of the core conversion, Lubbock sought a workload automation solution that offered built-in, out of the box integration with KeyStone. In his vendor search, Lubbock discovered that OpCon had already developed four critical connectors to KeyStone that supported running batch jobs, running administrative functions, deleting files from the export directory in the KeyStone server, and running Jaspersoft® reports. This sold it for Lubbock, because he knew he couldn't risk critical time and staff resources working with a vendor to develop such integrations from scratch, when there was a proven solution that met all of the Credit Union's key requirements.

"When I looked at what OpCon offered, I saw it had four connectors pre-built for Keystone," Lubbock says. "And I realized all the things we needed to do for KeyStone on the back end were possible. Once I saw that, the selection of OpCon was easy, because I knew it would save us an enormous amount of time in development."

Oregon State Credit Union began its OpCon journey in early 2016, implementing the solution in parallel with its KeyStone core conversion. The Implementation took 18 months, and the Credit Union went live on both platforms in October 2017. Lubbock appreciates how Oregon State CU's relationship with SMA developed into a true partnership during the implementation phase, and says "SMA is one of the best vendors I've worked with."

"Everyone had that same vision, which was evident during the on-site training sessions," Lubbock says. "I remember when SMA's team had a discussion around a finer point of automation, and thinking these guys really get what it means to want to automate workflows. They had the same mindset I had that this is something we need to put our focus on.

"SMA was the right vendor at the right time for us— they met me on the level I needed to be, to get what I needed done for the conversion. The SMA team came onsite on three different occasions for about a week each, and each time they came out, we implemented more advanced features of the OpCon product into our system, which was super powerful. By the time of their third visit, we got into more sophisticated projects like the LDAP integration, which has saved us a ton of time. That was really above and beyond."

> "Of all the vendors we worked with during our core conversion, SMA exceeded my expectations. They were wonderful to work with."
>
> *- Erik Lubbock, Director of Core Applications Services, Oregon State Credit Union*

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SOLUTION

OpCon from SMA Technologies offers Enterprise Functionality and Scalability, without the Complexity.
OpCon delivers a broad set of advanced features that are very easy to set up and use — allowing organizations of all sizes to quickly scale automation across a wide range of complex jobs. OpCon offers several best-in-market benefits, including:

☐ **Industry-leading Functionality.** With advanced features like reusable workflow templates that can be parameterized and pre-built for processing any number of times, and rule-based decision engine that makes it easy to set and maintain workflow schedules, OpCon can schedule any job to run at a precise designated time, at different locations and without dependence on unwieldy calendars

☐ **Enterprise-level Scalability.** OpCon offers operational control over the most complex environments and easily scales as your business grows. With capabilities like frequency scheduling, master/daily scheduling and multi-instance scheduling, you have control of when, how often and in what order tasks run. This provides optimal flexibility and visibility, while reducing errors.

☐ **Multi-application Orchestration.** With features like event-driven commands, OpCon can receive events from any system, and schedule jobs based on several variables. In essence, any system that can generate a text file can interact with OpCon.

☐ **Fast, Risk-free Deployment.** SMA's experienced deployment team can get automation up and running in weeks, instead of months. By employing a proven migration toolkit and templates, SMA has successfully migrated hundreds of thousands of jobs.

This helps ensure that migration from existing tools is fast and effective.

☐ **Fast, Easy Automation.** OpCon empowers organizations to quickly automate workflows to cut down your IT team's burden. Most tasks can be automated in low code, no scripting needed, to save you time and resources. And through OpCon's Self-Service application, business stakeholders can trigger automated processes at the click of a button - no IT support necessary.

"One area that OpCon has been significantly better than [our prior automation vendor] is the ability to combine self-service workflows to enable our departments to launch complex processes," Lubbock says. *"It's simple to use, and definitely a great evolution in efficiency over our prior automation system.'"*

☐ **Integrations to All Leading Credit Union Core Systems.** OpCon has pre-built integrations to all leading credit union cores, including Symitar Episys, Corelation KeyStone, and Fiserv DNA. SMA Technologies' consultants are experts at credit union workload automation and have the installation and migration from outdated schedulers down to a fine-tuned process. SMA's expert consultants can typically train and prepare internal teams for go live by the end of a two-week engagement.

"None of us here in the back office wanted to do operations tasks—we want to put new products into production. SMA had that same vision and mindset, from the top all the way through to the folks that I called on the phone throughout implementation."

- Erik Lubbock, Director of Core Applications Services, Oregon State Credit Union

RESULTS

Oregon State Credit Union has attained game-changing results through the powerful combination of the OpCon workload automation solution and the Corelation KeyStone core, including:

☐ **Saved Time.** OpCon gives time back to the Credit Union by automating complex processes like the Lightweight Directory Access Protocol (LDAP) used to set employee passwords and access permissions. Through the use of active directory, OpCon automated LDAP, enabling Oregon State CU to streamline this process—saving time and eliminating errors.

"Instead of using Enterprise Manager to manually create new users and set passwords and permissions, we can now set that up in active directory," Lubbock says. "OpCon simply looks at our organizational units and adds the information into the database with the proper permissions. So, when an employee is added or leaves the organization, the LDAP active directory just takes care of all that. The LDAP integration has saved me a ton of time."

☐ **Every Core Process—Automated.** With OpCon, Oregon State CU has **automated more than 600 jobs across 110 separate schedules.** The Credit Union was able to retain the same level of automation it had with the prior core system without adding FTE after converting to Keystone.

☐ **Redeployed Staff to Higher-Value Tasks.** Through its history of core system automation, Oregon State CU **successfully redeployed 2.5 FTEs from core processing tasks** across daytime, nighttime, weekend and holiday periods. By converting to KeyStone and implementing OpCon, the Credit Union has been able to continue the "complete, lights-out automation" of its core system.

☐ **Better Regulatory Compliance.** Through OpCon's Self-Service automation feature, Oregon State CU has been able to successfully meet stringent regulatory requirements, such as those related to ACH file exports to the Fed.

"We're able to enforce dual control for ACH uploads to the Fed, which is part of our due diligence and regulatory requirements," Lubbock says. "Whoever creates the ACH origination file from the core cannot also upload it to the Fed. We need to maintain a segregation of duties, and OpCon makes it seamless."

☐ **Faster Processing.** Thanks to OpCon's automation of critical core system processes using advanced scheduling features like frequency scheduling, master/daily scheduling and multi-instance scheduling, Oregon State CU has sped up its processing time with exceptional reliability, including little to no downtime.

*"I've never seen OpCon slow down due to the number of workflows it's running concurrently—**ever**," Lubbock says. "It's a very robust engine. And combined with KeyStone, if you want to do parallel processing, where you run more than one batch process at the same time, you can do that. On my prior core system, we ran everything sequentially, so it was 'old school' automation."*

SEEKING SCALABILITY BEYOND THE CORE

With OpCon, Oregon State CU is enjoying the flexibility and scalability of an enterprise-level workload orchestration platform, without the complexity. Lubbock is eyeing future opportunities to deploy this powerful, modern workload automation system beyond the core, in other areas of the organization.

"We don't run batch jobs in Keystone—we use OpCon," Lubbock says. "If we do want someone to be able to run a batch job, we'll give them a Self-Service button, because it's the safest way to do it. So that's been a real enhancement."

In the future, Oregon State CU is considering automating a variety of processes around the Credit Union, such as FICS mortgage origination platform (through OpCon's pre-built integration API), and even the institution's enterprise SQL servers. For now, the focus remains on automation in the core.

"If it touches the core and it requires some automation, then we're going to use OpCon to do it—we know OpCon can handle it," Lubbock says. "For everyone else in the credit union, they get the advantage of OpCon's automation without really being aware of it. Most departments are benefiting from the fact that we have the tool to automate pretty much whatever that they need to have done. We just take care of it with OpCon."