Case Study:

Financial Services Firm Credits AutoMate™ with Saving 400 Hours/Month in IT Tasks

Spotlight	
Organization:	PSCU Financial Services
Challenge:	To relieve staff of other manual processes such as batch file processing, FTP transfers, database queries, error monitoring, and data aggregation from disparate systems – all without the overhead of creating and maintaining custom automation scripts.
Solution:	Virtually all automation routines were put together entirely by using AutoMate's pre-programmed automation capabilities and drag-and-drop workflow assembly.
Benefits:	The AutoMate-enabled tasks at PSCU Financial Services are saving the company more than 400 hours on a monthly basis without spending tens of thousands of dollars on custom scripting.

Background

Providing back-end financial services to hundreds of credit unions is an IT-intensive job. For Florida-based PSCU Financial Services, it requires hours of repetitive tasks ranging from monitoring client websites for availability assurance to migrating files from a variety of sources to a central location for client retrieval. Since 2002, managers in several PSCU departments have turned to Network Automation's AutoMate BPA Server to automate these kinds of processes without the time and expense of coding. With just a few hours of building automation routines via drag-and-drop, supervisors have eliminated more than 400 hours of monthly IT busywork. Today, as a result, PSCU personnel have more time to interact directly with customers as well as perform ongoing development work to enhance the firm's services portfolio.

The Challenge

As the largest credit union service organization in the country, PSCU Financial Services provides a wide array of support services for more than 1,300 financial institutions. This includes everything from credit, debit, ATM, prepaid and bill payment processing services to running four 24x7 contact centers that answer more than 16 million member inquiries per year. It also includes the service that initially put AutoMate on the company radar: keeping tabs on member websites.

"One of our services involves continually checking credit unions' online applications to be sure they are up and running. At first, we were doing manual checks every 30 minutes around the clock. It just wasn't efficient," said Michael Aldrich, Information Technology Supervisor, Response Center. *"We needed a way to continue providing the service without taking support people away from the phones."*

As it turned out, that was just the first of PSCU Financial Services' automation requirements. The company also needed to relieve staff of other manual processes such as batch file processing, FTP transfers, database queries, error monitoring, and data aggregation from disparate systems – all without the overhead of creating and maintaining custom automation scripts.

The Solution

The search for an alternative to manual website monitoring led PSCU to AutoMate, a no-code business process automation platform that allows users to assemble automation sequences simply by dragging and dropping their choice of hundreds of pre-programmed actions ranging from *"Send Keystroke"* to *"Open Web Page" and "FTP Logon"* into a visual task-building window.

After downloading the AutoMate software, it took Aldrich's staff just 20 minutes to automate the department's website monitoring duties by specifying the keystrokes required to log onto each site, validate the availability of client-facing Web applications, and check for server outages. This set the stage for the software to execute the job by following those keystrokes in the proper order to simulate user input.

By 2005, PSCU Financial Services had added a number of computer operations tasks to AutoMate's plate. In 2007, the IS department signed on as well. In addition to performing checks of client websites, the software is now used for hands-off execution of tasks including:

- Batching nightly processing jobs such as parsing Excel documents by client and moving daily account transactions to the appropriate network share for client retrieval.

- Compiling client reports and other files from multiple data bases, including a third-party Web service as well as applications on in-house Unix, Windows and Novell servers.

- Encrypting all files with PGP encryption to meet regulatory requirements.

- Publishing client reports and files to a server for client retrieval.

- Querying databases to determine which customers receive which reports and then filtering out those that are not needed.

- Appending updated customer information to the customer's file and forwarding it to the appropriate vendor.

- Auditing PSCU databases to validate the completion of designated tasks and notify appropriate personnel of any errors.

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Virtually all automation routines were put together entirely by using AutoMate's pre-programmed automation capabilities and drag-and-drop workflow assembly, with Visual BASIC for Applications (VBA)-compatible scripting used for a handful of exceptionally complex steps. Processes are triggered automatically by either time or event, or manually with a single keystroke when certain prerequisites are needed for the job to run.

The company has also upgraded from AutoMate Professional to AutoMate BPA Server, a multi-machine client/server edition of the original AutoMate platform. The upgrade gives PSCU Financial Services the additional ability to design graphical automation workflows across multiple servers, maintain a central repository of reusable objects for easy workflow and task building, and centralize management and administration for all of the automated processes and components in the network for improved efficiency and security.

The Benefit

Cumulatively, all of the AutoMate-enabled tasks at PSCU Financial Services are saving the company more than 400 hours on a monthly basis without spending tens of thousands of dollars on custom scripting.

In the IS department, for example, simply eliminating manual FTP'ing of multiple files for hundreds of clients to a folder on the company's Web server - and instead letting AutoMate handle file transfer – has slashed the monthly workload by an estimated 36 hours. In the Response Center, the single act of allowing routine batch jobs to be kicked off, executed and monitored by AutoMate has delivered a massive monthly time savings of 350 hours.

"Every minute we save in these kinds of tasks translates into time we can spend on developing new reports, maintaining our data warehouse, doing other IT work that will benefit our clients, or keeping customer service representatives on the phones," noted Danielle Derby, Enterprise Information Manager. *"This is a huge business advantage."*

AutoMate is also enabling PSCU Financial Services to avoid human error caused by manual process execution, automating error identification, and paying off in a variety of other ways.

The company continues to expand its use of AutoMate on a regular basis, with several new automation projects in the works as of this writing. Aldrich and Derby consider the software an integral part of their IT toolbox. As befits a credit union service organization, they give credit where credit is due.

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