



Credit Union Banks on AutoMate for Hands-Off Handling of 27 IT Tasks

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Background

At First Credit Union in British Columbia, a small software investment aimed at automating a single task has turned into a multi-purpose automation workhorse that is saving well over 15 hours of weekly busywork for the institution's relatively small five-member IT team and four-person accounting staff. Initially, the credit union purchased Network Automation's \$1,500 AutoMate Professional drag-and-drop business process automation platform to replace a single-purpose job scheduler that triggered alert emails when overnight job processing failed. Today, First CU uses AutoMate to handle 27 tasks ranging from downloading clearing files to streamlining month-end processing - yielding major efficiency dividends with virtually none of the coding typically required to create automation routines.

The Challenge

Replace Legacy Job Scheduling Software

Serving six communities north of Vancouver from its headquarters in the city of Powell River, First Credit Union was in fact the first credit union in British Columbia when it was founded in 1939 by local millworkers under the name Powell River Credit Union. Today it has over 7,100 member-owners with three branches, six insurance offices, a wealth management division, and \$157 million in assets under management.

The group's involvement with AutoMate was sparked in 2002 by a major price increase in an alert system that First Credit Union had been using in conjunction with its Fincentric Ovation Banking System and Vinzant Software Global ECS job scheduler. With the alert product's license fee soaring to over \$10,000 per year, chief technology officer Frank Oldale started looking for another means of ensuring that the IT department would be informed in the event of an interruption in overnight report production or other ECS jobs. Recalled Oldale: "I didn't want to wait until the next morning to learn that the ECS system went down."

The Solution

AutoMate Professional

Oldale rejected the option of writing an automation program to take over alert duties. "We had only two people in the department at the time, and we would have not only needed to write code but manage it. It made more sense to find a less expensive third-party alert system or automation software that would eliminate most or all of the programming work."

That realization sparked First CU to research automation software on the Internet. After a straightforward download and installation process, Oldale used the software's drag-and-drop



Task Builder to instruct AutoMate to continually poll a folder listing both successful and failed ECS processes and automatically email the IT team with each new notification. It took just a few hours - with no coding - to get the job done.

In that short time, Oldale also realized that the AutoMate platform could relieve both IT and accounting personnel of many repetitive chores that took time away from other work. The list of tasks on AutoMate's plate now includes:

- **Daily downloading of clearing files** documenting member transaction activity such as check clearings, account transfers and preauthorized credits and debits. AutoMate saves accounting staff an hour a day by logging onto the central British Columbia/Ontario credit union FTP server, looking for files by pre-defined variables such as date, and transferring relevant files to a designated folder without manual intervention.
- **Electronic distribution of daily and monthly reports** that used to require up to 90 minutes a day in manual conversion, printing and delivery. At designated times, AutoMate retrieves 20 daily and 35 monthly Ovation reports run through the ECS system, converts them from Ovation's hard-to-decipher format to PDF files, and posts them on the company intranet for easy password-protected access.
- **On-demand retrieval of miscellaneous reports** that previously had to be converted, printed and distributed by special request. Users who find a needed non-scheduled report listed in the credit union's Ovation report directory can now drag it to a special folder. AutoMate detects and converts it to a PDF file and posts it on the corporate intranet within 10 seconds after arrival in the folder, shaving several hours a week off the IT workload.
- **Daily transfer of card information files** showing new member debit cards issued through First Credit Union's website during the day. AutoMate transfers the files from the credit union's secure FTP server to the Threshold Financial (card transaction switch provider) services switch at the same time every night, eliminating the need for IT staff intervention.
- **Automation of multiple month-end processing tasks**, slashing the processing timeline from five hours to just two as well as allowing the work to be done unattended at night. AutoMate passes newly generated reports and statements along the chain as each of eight post-processing steps is completed, ending with sending finished statements to a third-party printing and mailing service.
- **Monthly backup preparation**, including compressing and moving log files and databases to a secondary storage location for manual backup by IT staff. This data consolidation process – triggered by schedule - previously took the team at least an hour a month.

The Benefit

Saving 80 Hours a Week

All told, First CU now uses AutoMate to automatically launch and run 19 scheduled tasks as well as to execute eight unscheduled tasks that are triggered manually. In addition to freeing the now-five-person IT team to work on other projects related to the institution's core financial services offerings, this extensive use of automation has reduced labor costs in the accounting department by trimming two employees' daily work shifts from 8-6 to 9-5.



Cumulatively, the efficiencies enabled by AutoMate are saving First CU as much as 80 hours of work per month – not counting the time that would be spent writing custom automation programs and maintaining related code without AutoMate’s large menu of pre-built automation processes and drag-and-drop Task Builder interface for assembling automation sequences.

“What we find really useful is the power and flexibility of AutoMate. Having all of these automation shortcuts usually eliminates the need for programming, but we also have the option to use Visual Basic scripting when we have a particularly complex set of variables,” Oldale said. “We purchased the platform to handle a single task, but it has turned out to be a versatile solution that has enabled us to stretch our IT and accounting resources in many ways.”

Oldale continues to expand AutoMate’s assignments as new needs arise and considers the automation platform a key component of his IT infrastructure. That’s a big return for a software program purchased as a defense against another vendor’s budget-busting price jump, proving that a penny saved can turn into much more than a penny earned.