SMArt Sessions 2019

Customer Success Story – Alliant Credit Union

Presented by: Josue Madera, Josh Higgins, Cordy Ramer

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SMA
TECHNOLOGIES

Introductions

- Jay Wehner
- Senior Software Engineer
- 20 years at Alliant CU
- 3 years on OpCon

- Josue Madera
- Software Engineer
- 17 years in CU industry
- 4 years on OpCon

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Statistics

- 216,516 OpCon Jobs

- 1,595,554 OpCon jobs run in the past 6 months

- 99.6% successful job completion

ALLIANT

1ˢᵗ Customer To Use the OpCon API

E.A.R.

Enterprise Automation Review

Enterprise Automation Review

- Review of existing OpCon setups for changes

- Review of other departments for automation potential

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Enterprise Automation Review

- Solution Consultant prepare an automation assessment which outlines items discovered during the review process

- Account Executive and Solution Consultants will work with the site to plan out which items to take on in what order

Enterprise Automation Review

- Solution Consultant will work with the team to implement any items you need assistance with

- Some items may be implemented without assistance from SMA

Automation Review Purpose
Automation Standards

- Updating automation standards and practices as well as expanding the automation footprint.

- Standardize existing OpCon processes, centralize pieces of automation, and utilize good naming standards that make schedule/job/variable names more intuitive.

- Move all scripts that resided on servers to the OpCon Script Repository

- Removed over 800 jobs that were not being utilized

Automation Review
Benefits to Alliant Staff

- To standardize current and future workflow implementations, and have everyone create new processes to those standards.

- To implement OpCon Automation based on targets identified in meetings with departments outside IT.

- Saving scripts within the OpCon database centralizes and protects those scripts

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Automation Review Purpose
Configurations

- Updated all agents to utilize TLS communications

Automation Review
Benefits to Alliant Staff

▫ Enhanced security as agent and SMANetCom must exchange credentials to establish a connection

▫ Auditors love more security!

▫ Especially important for those who are communicating to agents across networks

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Automation Review Purpose
Self-Healing Logic

□ Third party upload jobs updated to have retry logic to account for network connectivity outages

□ Incorporated a On-Demand archival job that can be utilized to free up disk space when failures occurred due to reaching maximum capacity

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Automation Review
Benefits to Alliant Staff

- Less failures as OpCon cleans up its own failures

- Reduce after hours efforts for staff

- Increases effeciency as there is no longer a need to wait for human intervention

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Automation Review Purpose
FICS

- Continued automation within the FICS application

- Created Metro 2 reporting files

- Started sending output files to Onbase for archival

- Printing of PDF's generated by FICS to a network printer

FICS®

Automation Review
Benefits to Alliant Staff

▫ Continued automation within the FICS applicaton

• Imaging of documents

Automation Review Statement of Work
216 Onsite Hours + 80 Remote Hours

- Updating the OpCon Environment to the latest Version in both Test and Production – 3 days

- ACH Workflow – Deploying an On-Demand workflow – Developing with MPO's assistance including all self-service needs, thorough testing and moving to production – 5 days

- Goodnight Process – Re-engineer the Goodnight process in test breaking up the job files into cohesive blocks making the workflow more intuitive. This is an Episys best practice. This may involve initiating an onsite engagement with Kail Neuman or Lyn Pagsolingan, Automation Specialists from Symitar. – 7 days plus a week of Symitar onsite services.

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Automation Review Statement of Work
216 Onsite Hours + 80 Remote Hours

- Workflow changes:
    - Scoping Variables – 2 days
    - Reworking Schedules – to utilize best practices and good naming conventions – 3 days – Test, 5 days - production
    - Mortgages – Workflows to be addressed after Symitar programming changes
    - MPO – Workflows to be addressed after Symitar programming changes

- Assess the notification strategy for the Production and Test/Dev System and turn off all positive notifications possible – 2 days

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Automation Review
End Result

- Continued expansion of automation within the FICS application

- Enhanced/beginning use of existing OpCon features

- Reduce after hours support needs with self-healing routines

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Yes, that's
possible.