Logix

From Manual Processes to Consistent Automation

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For years, Logix Federal Credit Union tried to automate data processing using a competitor's software, but managed to automate only 35 processes. This required Logix to staff the data processing department twenty-three hours a day during the week, and eight hours on Saturday and Sunday. The night hours were difficult and left the credit union at higher risk of human error which affected the service level for their members. Logix knew they had to make a change. Their goals were to fully automate evening processing, and remove the need for night and weekend operators.

Located in Burbank, California, Logix Federal Credit Union is one of the largest and strongest credit unions in the country

- Unix and Windows
- 450 employees
- 1,100 jobs run (per day)
- $4.1 billion in assets
- 154,000 members
- 15 branches

CHALLENGE	SOLUTION	BENEFITS
Their legacy scheduler lacked options and flexibility	OpCon provides true, event-driven automation and numerous scheduling options	OpCon reduces weekly data-processing time by 40 percent
Staff manually processed "Goodnight" for Symitar® Episys®, causing inconsistent posting times for members	OpCon not only automates Episys, it eliminates unnecessary sequential processing and time-based schedules	OpCon automatically and consistently posts "Goodnight", resulting in increased member satisfaction
The data-processing department manually processed thousands of jobs per day	OpCon automates data-processing operations and increases efficiency in the department	OpCon automation allows the reduction of regular weekday shifts by eight hours per day and eliminates weekend shifts

In 2013, Logix replaced their limited, time-based scheduler with SMA Technologies' OpCon. The credit union's data processing staff received excellent training and on-site implementation services from SMA Technologies. With their newly gained knowledge, they had the confidence to automate many processes on their own. Within three months, the credit union automated more than 4,000 processes which equated to 70 percent of its data-processing workload.

True Automation Brings Agility

OpCon empowered the data processing department to do more with less, eliminating the weekend shift and cutting weekday shifts by eight hours. Many members commented that they noticed better service and 96 percent of surveyed members said they would recommend Logix to a friend. The OpCon implementation also resulted in the data processing team being recognized as the credit union's "Department of the Year" twice.

> "We automated more than 70 percent of our processes. Now, we're reaching out to other departments, helping them automate, too.

Joe Gates, Data Processing Manager

The data processing team fully automated some of their most difficult workflows, including ACH, "Goodnight" and server backups. Those processes now require zero operator assistance. Also, core processing post times are now very consistent because automation executes at the exact same time every day. Logix internal departments are emailed directly from OpCon, letting them know their processes are complete. OpCon also notifies end users when their input is required to finish processing.

Integrate Processes Easily with OpCon

OpCon seamlessly executes all types of processes for Logix, including:

- ☐ ACH
- ☐ OFAC
- ☐ File management
- ☐ Backup processes

For ACH, OpCon continuously searches for files to automatically edit, post and send data to the appropriate departments. Logix also automates OFAC processing by having OpCon monitor emails which trigger updates for all OFAC processes. The credit union is also using OpCon to control file deletions on several e-vault servers at their co-location, and using it for multiple backup processes over several servers.

SMA Technologies' support since implementation has exceeded our expectations. There is always a live answer, and they resolve almost all issues within the first call.

> "Within three to four months of installing OpCon, we automated more than 70 percent of DP's processes."

Joe Gates, Data Processing Manager