

# Automation Anywhere enhances credit union's automated back office processes—saves two work days each month.

## CASE HIGHLIGHTS

<b>Profiled Organization:</b>	Capital Communications Federal Credit Union, Albany, New York
<b>Challenge:</b>	Perform several repetitive but business-critical daily tasks essential for the smooth functioning of the credit union.
<b>Solution:</b>	To create a jobset of tasks that run automatically on a daily or weekly basis to update loan account data, append key reference data to optical files, and restore "lost" teller receipts to a backup file, among other things.
<b>Benefits:</b>	Automation Anywhere has eliminated the twin problems of human error and daily manual intervention in various critical tasks and continues to save the credit union up to two work days each month.

## BACKGROUND

Based in Albany, New York, Capital Communications Federal Credit Union (Cap-Com FCU) was established in 1953 to serve the employees of the New York telephone company. Currently, the credit union—the second largest in New York with assets close to \$900 million—employs 200 people and serves about 73,000 members through nine branches in New York's capitol district region.

Early in 2009, the credit union contracted to have an industry-specific operational package automate most of its back office processes. David Deering, an IT operations administrator who has been with the credit union for 24 years, was charged with automating the processes and maintaining the systems, which included monitoring them to ensure that they were processing successfully, and investigating any failures. But first he had to create the applications that would launch automatically on a daily or weekly basis as needed to run the various jobsets.

Specifically, Deering needed to automate a process where the user calls up an application and enters values at the interface before running the application, and one where the user pulls numbers off reports at a website and enters them into a mainframe database. The backend automation software was unable to handle these processes because of its limited ability to capture a screen, so the company recommended Automation Anywhere to Deering.

## OBJECT-DRIVEN AA WINS THE DAY

Deering immediately saw the advantages of working with an object-driven program like Automation Anywhere. Once you tell it to work with specific object names, it finds the objects anywhere on the screen, no matter how often they move around.

*"I love the feature of being able to record keystrokes to create the automation code and then go in and modify the code to make Automation Anywhere do exactly what I want."*

*- David Deering, IT Operations Administrator, Capital Communications Federal Credit Union*

*"I eventually hope to use Automation Anywhere to automate all routine processes with all applications, so my only involvement would be to check for emails signaling that the jobs were successfully completed."*

- David Deering, IT Operations Administrator, Capital Communications Federal Credit Union

*"The code behind Automation Anywhere is largely object driven, so you can tell it to work with specific object names. So, even if the object moves, because it knows the object name, Automation Anywhere can find it anywhere on the screen."*

- David Deering, IT Operations Administrator, Capital Communications Federal Credit Union

The very first task assigned to Automation Anywhere was the daily updating of loan data. To do this, the program has to call up an SQL database application on the server. Entering a date at the user interface calls up information on all loan payments made for that date. This information is matched up with the loan records information and the records updated on the loans database.

Done manually, the process usually took a little over five minutes daily but a simple error in entering the date, for example, would cost Deering anywhere from half-a-day to two days of work to make the corrections, cross check the database, and update it. Also, the process had to be repeated three times on a Monday to account for that day and the weekend, making it all the more likely that errors would be made.

Deering created an executable task within Automation Anywhere that is called up once a day by the backend automation system to perform a sequence of steps that includes signing into the SQL database, opening up the application interface, entering the current date, connecting to the database, extracting pertinent data, applying it to the database, and disconnecting the application from the database. When the task is successfully completed, Deering receives an email.

### AUTOMATION NOW AND INTO THE FUTURE

Success with one application inevitably led to explorations into other areas where Automation Anywhere could assist the IT department in helping Cap Comm FCU function more efficiently. In the past eight months, Deering and his IT colleagues have successfully automated several new processes including:

**Daily Key Reference Updates:** The key reference is a cross reference file that makes it possible to link documents in the credit union's optical server with the correct account on another server. Users can call up the relevant documents from the optical system using the name, social security number, or account number. Every night, a new account list is extracted from the server and is appended to a client reference list within the optical system. Automation Anywhere starts up the application that appends the new information to the current list on a daily basis, including weekends, thus reducing the workload for the person overseeing the system on Monday.

**Weekly Teller Receipt Back-ups:** Receipts generated by the tellers are automatically uploaded into the optical system. However, for reasons unknown, about 0.1 percent of the receipts end up in a temporary folder on the network. So, once a week, the IT department used to run a manual process to locate the folder and push the receipts into the optical system. Now, Automation Anywhere kicks in every Friday to locate the folder on the network, push the receipts into the optical system, and delete the folder—all in a matter of minutes and without needing a reminder.

Additionally, the IT department is working on creating an automatic weekly back-up process for the nearly three thousand different applications on the network. The process, which is currently being tested, should be operational in a few months and will save the credit union even more time.

### PRODUCT INFORMATION: AUTOMATION ANYWHERE

Automation Anywhere is an intelligent automation software for business & IT tasks. No programming required. Features include state of the art drag and drop automation, remote deployment, Visualizer, Workflow designer, image recognition and much more. Free trial available. Read more about this product at <http://www.AutomationAnywhere.com> or call our sales hotline +1-888-484-3535.

