Hyland®

ALLIANT CREDIT UNION

Top 10 largest U.S. credit union increases efficiencies enterprise-wide

THE CHALLENGE

Even though Alliant Credit Union had an enterprise content management (ECM) solution, the credit union was only using it in a limited fashion — scanning, storing and retrieving documents in just a few departments. Alliant realized it needed a more robust ECM solution that could easily extend across the entire enterprise. That solution also needed to include easily configurable workflow software robust enough to automate time-consuming, paper-based processes.

THE SOLUTION

In late 2011, Alliant implemented the OnBase content services platform to begin automatically capturing documents and information. Now, more than 95 percent of the credit union's documentation is electronic.

"But we wanted to do more than store document images," says Heather Lally, vice president of operations at Alliant.

So Alliant utilized OnBase to stop printing documents and instead access them electronically from multiple systems. The credit union easily integrated OnBase with Alliant's existing Symitar core processing system to enable instant and secure access to reports and all other member documentation — without leaving familiar screens.

Empowering work to flow electronically

Next, Alliant transformed its manual accounts payable process with OnBase and its powerful workflow software. The credit union easily built three mission-critical workflows: human resources (HR) for onboarding, accounts payable (AP) for invoice processing and legal for contract management.

Now, the credit union automatically forwards documents and information through processes — notifying stakeholders as it does. As an example of how workflow optimizes processes, if it doesn't register an approval in due time, the system automatically escalates the request for approval to the next level.

"That reduces late fees from invoices potentially sitting too long on desks," says Lally.

ALLIANT

SIZE
$8.9 billion in assets
Top 10 largest U.S. credit union
More than 300,000 members

ONBASE INTEGRATIONS
Symitar

LOCATION
Chicago, IL

DEPARTMENTS USING ONBASE
Enterprise-wide

> " We created efficiencies, increased accuracy and lowered costs through structured processing. This allows us to continue to move quickly to provide great service to our members."

Heather Lally
Vice President of Operations
Alliant Credit Union

Another important workflow alerts managers when any one of Alliant's 300 third-party contracts is up for renewal. The solution tracks each point in the process of renewing or initiating a contract in the workflow, including due diligence, request for proposal and contract negotiation.

Developing a fraud solution together

Teaming up, Alliant and Hyland built a fraud management solution to ensure it not only was the right fit for Alliant's needs, but was scalable for credit unions of all sizes. The result was a system so easy to use, it took employees one hour to master.

By doing away with the need to cross-reference multiple Excel spreadsheets, the solution saves several hours per day for Alliant's fraud investigators. It used to take Alliant four or five hours to pull a monthly fraud report. Now it takes less than 10 minutes. Further optimizing the process, OnBase's case management solution allows investigators to easily log, access and interact with all data — including records, documents, forms and history — involved in a fraud investigation.

"Using the Fraud Case Management solution, we now have analytics as well as the ability for multiple fraud analysts to work cases at the same time," said Jason Knapp, senior manager of Operations.

Optimizing enterprise-wide

Looking across the enterprise, the credit union sees other ways to optimize.

"We still have other manual processes. We want to create more efficiencies, increase accuracy and lower our costs through structured processing. This allows us to continue to move quickly to provide great service to our members," says Lally.

THE DIFFERENCE

Integrates with Symitar: By integrating OnBase and Symitar, Alliant empowers employees to instantly access information while staying in familiar computer screens, giving them more time to focus on members.

Reduces AP processing time by 70 percent: "Prior to implementing the AP solution, we had two full-time employees (FTEs) managing this very manual process. Now it takes one-half an FTE to manage the automated process, allowing us to redeploy those employees elsewhere. This was a big win for us," says Knapp.

Streamlines fraud investigations: Reports that used to take four or five hours to produce now take 10 minutes.

Optimizes processes across the enterprise: Instead of searching file cabinets or file shares, all employees have access to the documents and information they need with a few mouse-clicks.

Learn more at **Hyland.com/CreditUnions**

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