

# Finger Lakes Credit Union

**“** Finger Lakes Federal Credit Union has completely replaced ‘centralized’ UNIX host printing.



Now their core SUMMIT business reports automatically arrive daily on each employee’s desktop in Excel, PDF, and Word formats.

Finger Lakes found the byREQUEST solution affordable, and a perfect fit with their new Fiserv-SUMMIT application.

**“** Significant cost savings were achieved. **”**

Over 40 years, the Credit Union has accumulated a significant amount of customer data, and like all financial institutions must maintain the security and integrity of that data. Timely access to the records for the administrative staff is equally important, so that they may provide their customers with a first class level of service.

The Credit Union’s IT team, headed by Louis Apicella, embarked upon a project in 2005 to enhance the underlying technology that supports the Credit Union’s business; among other changes, this entailed migrating from a HP3000 MPE to a Unix-based HP9000 environment; HP would be phasing out support of the MPE platform, which was one of the major drivers for this project.

With this move to upgrade the IT infrastructure came the requirements that (1) there would be no disruption to the day-to-day Credit Union business during the migration, and (2) that the hundreds of thousands of customer records held in the existing archiving systems would be preserved. The real challenge for the IT team emerged when they discovered the cost of upgrading the existing DOCMAN system: enabling it to run on the new UNIX platform would be an expensive option, and worse, would lack some of the functionality that was needed.



“We were faced with a real dilemma. Our business relied on the existing system. Although our users had identified needed improvements to the current system, replacement systems under consideration were missing several ‘must have’ features found in the old system. It seemed an appropriate time to assess user needs to improve the efficiencies of the report creation, distribution and management process and find a solution that would both fit our new IT system and bring in the improvements required,” commented Louis Apicella, IT Manager.

Apicella had received a recommendation from another software company that byREQUEST, from Hillary Software, was a solution worthy of investigation.

*The byREQUEST application would completely replace “centralized” UNIX host paper printouts with WORD, EXCEL and PDF reports delivered directly to each employees’ desktop.*



Finger Lakes Federal Credit Union, headquartered in Geneva, NY opened its doors in 1967 as the Geneva School Employees Credit Union. Nearly 40 years later the Credit Union has grown to a membership of over 14,000 individuals and 250 Select Employer Groups.

Users could then browse, search, analyze, and archive their reports using familiar, "friendly", PC applications. It would make viewing, analyzing, sectioning, bursting and archiving reports from their Fiserve SUMMIT credit union application seamless. Automated distribution of reports to secure Windows folders on the LAN or email delivery is built in to the byREQUEST solution. Because all the reports would arrive as WORD, EXCEL and PDF documents, little if any user training would be required. He decided to investigate this software and the company further.

After conducting due diligence with the team at Hillary Software to ensure the byREQUEST solution would meet the needs of the Credit Union users, Apicella was impressed by the capabilities of the application.

### ***He found it both affordable, proven, and a perfect fit with his new Fiserv-SUMMIT credit union application.***

Users were happy that their demands could be met, and were comfortable that a transition to the byREQUEST solution would require a minimal amount of training, yet still provide them with flexibility to manage their report processing needs.

#### **The bottom line benefits**

- ▶ Improvements in the production, archiving and retrieval of reports
- ▶ Reports that should be in EXCEL arrive in EXCEL!
- ▶ 50% reduction in paper printing requirements
- ▶ Reduction in the demand upon IT to service adhoc user requirements
- ▶ Ease of use, minimal user training
- ▶ Speed of implementation, fully operational in 2 weeks

"For our users, the new system is reaping benefits in terms of efficiency and ease of use. The call upon my team to support the user's requirements is significantly reduced now; users are happy that they are much more in control and able to manage their tasks.

***We have also achieved significant cost savings by reducing the paper printing. Combine these achievements with the excellent relationship we have built with the Hillary Software team and the impressive customer support, our decision to select their byREQUEST solution is quickly paying dividends," concludes Apicella.***



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