



OPTIMIZING FISERV DNA CORE BANKING

KOHLER CREDIT UNION USES ALTAIR® MONARCH® TO MANAGE FISERV® DATA FEEDS

About the Customer

Kohler Credit Union is a \$615 million not-for-profit financial cooperative that's owned and governed by its members. Founded in 1938, it serves Wisconsin residents with a range of retail financial services for consumers and businesses, including home mortgages, auto loans, savings and checking accounts, and credit cards. The institution makes extensive use of Fiserv products, including Fiserv DNA®, Fiserv Prologue®, Fiserv Optis®, and others, to support its operations. Fiserv provides the processing infrastructure required to handle deposits, credit cards, and loan operations, including payments and billing, mobile banking, merchant account processing, and more.



Monarch is a game changer in our world and has helped us by leaps and bounds. It is very powerful in taking in any data and analyzing and comparing it. Compared to what we did before, we now just take the hundreds of server reports dumped on our network every night and put them through various Monarch workflows, which deliver exactly what our end users are after.

Matt Fehrmann, CIO,
Kohler Credit Union



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Their Challenge

Kohler Credit Union is a long time Fiserv customer and planned to migrate from the Fiserv DataSafe® account processing platform to Fiserv DNA, a newer platform with improved retail and commercial functionality. The new platform would enable the credit union to offer a wide range of additional account services to its members. The institution needed a way to make this business-critical migration smooth and efficient.

Fiserv DataSafe and Fiserv DNA core systems both generate over 300 reports every day, and these reports contain data that's critical for banking operations. Unfortunately, accessing these reports' data isn't easy because of their semi-structured format.

For example, the credit union's audit and compliance team must review Fiserv deposit reports, which list every activity each member has made, to identify certain activities. Trolling through more than 600 pages in a typical report makes this critical process difficult and time consuming.

Our Solution

While the Kohler team was searching for a solution, a Fiserv account representative recommended [Altair® Monarch®](#). The credit union purchased a single license to support reconciliation of ACH and accounting side procedures as a test of Monarch's capabilities.

Once they began using Monarch software, they discovered the [extensive library of prebuilt Monarch models available in Altair's user portal](#), including many models for Fiserv DNA, Optis, Prologue, EFT, and more. The Kohler team investigated the model library further and discovered that Altair offers a growing list of pre-built and tested models that instantly addressed about 80% of Kohler's business requirements. As new requirements arise, their users can open Monarch, download the models they need, load the Fiserv data, and immediately begin doing the important work of analyzing the information instead of spending hours preparing the data for analysis.

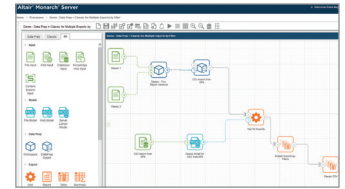
After discovering the depth and range of functions in Monarch's model library, the credit union made the decision to invest in [Altair Monarch Server](#), which allowed them to automate multiple processes.

Results

With Monarch Server workflows, the Kohler team has benefitted from outstanding results that have significantly reduced the time and headache previously associated with deposit reports. Now, the 600+ page reports that previously took more than two hours per day to process are now tackled by Monarch Server workflows in mere minutes. This enables the Kohler audit and compliance team to focus on exceptions and saves many staff-hours every week. The institution's compliance and audit teams now receive the information they need automatically and in formats that are easy to understand and analyze.

Lastly, the Kohler team also used Monarch to manage their migration from Fiserv DataSafe to Fiserv DNA, which saved the IT team many staff-hours during the project and ensured the migration was completed on time.

To learn more, visit altair.com/financial-services



Kohler Credit Union uses Altair Monarch Server to automatically ingest, process, and distribute reports generated by their Fiserv DNA account processing platform. The software can connect directly to text, PDF, CSV, Microsoft® Excel®, JSON, XML, and HTML files, SQL, DB2, and other databases, and big data sources including AWS, Cloudera, and Cassandra. It supports API integrations, includes a comprehensive data catalog for models and workspaces, enables scheduling and monitoring of critical workflows, and exports to flat files, SQL databases, and other formats.



The Altair team has been fantastic in helping us build the data preparation and transformation processes we need to automate our critical workflows, saving us many hours every week. We keep coming up with new requirements as well and add new use cases frequently.

Matt Fehrmann, CIO,
Kohler Credit Union