

Volume 2010, Issue 1
January 2010

UltraData Happenings:

- **HAPPY 2010!!!**
- UltraData® Enterprise CEO Summit will be held March 17-18 in Englewood, CO
- EOS has been launched
- UltraData® Enterprise OpenPath™ environment has changed



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President's Message

We all learned our alphabet as young children. It was something we all did, and we were teased if we didn't know it, and it usually had a nursery rhyme to accompany it. Maybe that's what the lawmakers need to do – come up with some catchy nursery rhyme so that this new alphabet we are all learning (to cope with) will be a little more fun. I seriously doubt that Mother Goose would see any humor in putting DD in the alphabet, but it's certainly been there this year for all of us, along with CC, E, Z, and a few others for good measure. As government's 'pro consumer' stance begins to have a direct impact on our bottom lines, we're all starting to see that the breakneck pace of change due to outside pressures shows no sign of throttling back in 2010.

While all of us continue to deal with regulatory issues, and most of us also continue to battle a sluggish economy, all of the normal day to day challenges still face us. Member service issues, reporting/budget issues, staff issues, technology changes, and of course, how do we squeeze the absolute most from our core provider. Your Executive Group, with feedback from you, the users of that core, have made 2010 the year that we focus on that very thing through education. As you read this, we are gathering the information that you sent us in your surveys, and are making plans to bring to the table what you see as the needed items. We're working with Harland to leverage their resources, and along with ours, we're confident that you will see some great offerings to take advantage of.

I'm writing this the day after Groundhog Day. That furry rodent saw his shadow and went back into his den. 6 more weeks of winter I'm told, and I'm none too happy about it. But with everything that's been going on in our world as credit unions, I'll be perfectly candid – I hardly noticed it was winter. Whether that is good or bad remains to be seen, but through all of that your Executive Committee remains committed to adding value to your being part of this group. When we provide you with a survey opportunity, fill them out; if you have something to say, email us. Help us give you the best for your membership dollar – and look for the opportunities in 2010 to take part in making your partnership with Harland and UltraData even stronger.

Jeff Walter
President

But WAIT, it doesn't stop there!

You sit back and think to yourself, "It's a mighty fine operation we're running. Employee's are happy, members are happy and we don't have NCUA camping out in our Board Room - Life is good!" But could it be better? I believe for most of us, UltraData® Enterprise is the "heart" of our operation. Have you ever wished that you had another set of eyes to come in and monitor your processes and procedures just to see if you're operating as efficiently as you could be? Well it just so happens that Harland Financial Solutions now offers such a service called Enterprise Optimization Services. This service delves deep into your credit union operations looking for opportunities for improvement.

The Enterprise Optimization Service was launched during the Connections user conference this past September 2009. Martin Alexander, Director of

Implementations and Professional Services explained "We realize the investment that our clients have made in UltraData Enterprise and wanted to develop a service to help clients fully utilize and reap the benefits of the system, get the most out of their technology investment, and drive additional efficiencies, thus reducing overall costs."

The Enterprise Optimization Service is a multi-pronged service that audits your credit unions processes, software usage as well as knowledge gaps. However, credit unions processes, software usage as well as knowledge gaps. Although, unlike other audits, the team not only makes you aware of methods that could be improved upon but provides you with a plan of action.

Treasurer's Corner

Membership Dues invoices were mailed out at the beginning of January. 151 Credit Unions have already paid. Thank you!

During the 2009 Connections, we discussed ways to improve our role to the UltraData Users' Group members and training was the hot topic. We are working with the UltraData Executive team to find the best ways to deliver more training to our end users. In lieu of requesting contacts via the renewal invoice (as we have in the past), we ask that upon paying dues that you have all Credit Union employees wishing to be on the group's contact list enroll for access to our web site at www.udusers.com. Doing so will automatically populate them to our email contact list. Our old web site limited us to having only one contact per credit union so we want to be sure all of your employees have access to the new website and it's resources.

Income & Expenses 01-01-09 to 12-31-09:

<u>Income:</u>	
Annual Dues	\$ 40,750
Discount for new members	(1,650)
Vendors—Website Advertising	875
Vendors—Connections Network	4,000
Interest Income	6,793
Total Income	<u>\$ 50,768</u>
<u>Expenses:</u>	
Connections – Booth	\$ 3,203
Connections – Networking Event	5,244
Connections – Scholarships	1,367
Connections – Other Expenses	500
Miscellaneous Expenses	937
Travel – Connections	14,410
Travel – Quarterly Mtg w/UD	13,281
Website – Development	5,844
Website – Hosting	337
Website – Surveys	200
Total Expenses	\$ 45,323
Net Income over Expenses	<u>\$ 5,445</u>

As a reminder to those who have not yet paid their 2010 dues, we remove UltraData Users' Group web site access for non-payment after February 15th of each year.



If you have any questions about your credit union's dues or the financial information provided, please email Linda Conway at treasurer@udusers.com.

But WAIT, it doesn't stop there! (Continued from Page 1)

"Our experts work with the client to develop a plan of action, implement the changes and continue to provide reports, evaluations & reassessments to ensure that your institution continues to function at optimal levels," Martin said.

The service team consists of experienced and knowledgeable resources within Harland Financial Solutions who understand the credit union industry as well as UltraData Enterprise. "This level of expertise ensures that we can approach the assessment from all angles and take both technical and practical aspects into consideration," Martin explained.

The process begins by an experienced team spending time on-site at the credit union interacting with executive and functional management and end users to identify how the system is currently being utilized, what processes are in

place and if any training deficiencies exist. The team also looks at current product configurations, observes daily activities and processing workflows. But it doesn't stop there.

The team then returns and the real work begins as they consolidate and analyze their findings. The team documents a detailed observation summary that ties back to the original program objectives and develops a detailed report that pinpoints areas for improvement and recommends a course of action which is delivered back to the credit union management team.

"The report is provided to the management team at the credit union", explained Sharon Alexander, Senior Manager of Implementations and Professional Services. "We walk through the report in detail to ensure

the credit union understands the findings and has time to review the recommended next steps." After the management team has had time to review and digest the findings, another meeting of both management and the team is scheduled. "During this meeting we assist with developing a plan of action which may include additional training or possible service enhancements."

But WAIT, it doesn't stop there!

The Enterprise Optimization Services team continues to work hand-in-hand with the credit union management team to ensure success and speed adoption of the new processes.

During these times of financial turbulence and corporate credit union bailouts, many of us have had to tighten our belts and Harland Financial Solutions understands that. That's why they developed Enterprise Optimization Services.

6th Bi-Annual UltraData® Enterprise CEO Summit

The next UltraData® Enterprise CEO Summit will be held on **March 17-18, 2010** in the Harland Financial Solutions Englewood, Colorado facility. Building on their past success with CEO sessions in Pleasanton, Colorado Springs, and the well attended CEO Summit at the Connections User Conference (held this past September in San Diego); the March venue will bring together credit union CEOs to share ideas and **perspectives** that affect your credit union's strategic direction.

The agenda will address industry direction, Harland Financial Solutions product roadmap and service strategies, and the alignment between the UltraData Enterprise direction and the industry and Harland Financial Solutions strategy.

Participation is crucial for the success of these events. We know your CEO's time is valuable, however, having attended many recent CEO Summits from Harland Financial Solutions, I can attest to the value they bring. The Summit will provide opportunities to converse with Harland Financial Solutions Executives as well as gain valuable insight from company and industry experts. Some highlights for the upcoming CEO Summit include:

1. Industry overview for the "New Reality". This topic of discussion will identify the trends your credit union will be faced with the next 1-2 year time period, and explore how you will have to deal with that reality in your credit union.

2. You will be updated with the Harland Financial Solutions product and service future strategy and discuss how that aligns with your credit union's strategy and goals.

3. A close look at the UltraData Enterprise strategic and technology roadmap.

4. Guest's will be provided a tour of the state-of-the-art Englewood Data Center (home of the Cavion® ASP service) – quite impressive!

5. Security expert from the Englewood office, Jeff Marshall, VP of Emerging Technologies, will impart his wisdom on the most recent developments and trends to watch in 2010 around online, IT and fraud security.

6. Karen Rice, EVP/COO from Fairmont Consulting, will co-present with Leslie Ellis, CEO of Credit Union 1 in Anchorage, on how a sales culture has changed the way her credit union operates and the assistance Fairmont has provided. Guest will be treated to a 'Case Study' of building a sales culture. This will include insight from fellow credit union CEO's about how to establish, cultivate, and thrive with a sales culture.

To date, Harland Financial Solutions has approximately a dozen CEOs committed to attend – but they really need your help to at least double that number. Again, your participation is critical to the success of these venues as they are orchestrated for the benefit of the customer base.

Certainly you won't be disappointed with the industry and company information, but more so, this is an opportunity for your CEO/President to hear first-hand about the direction and timing of UltraData Enterprise!

For additional information or questions, or to reserve your spot, contact Jan Wilgus, Marketing Director (800) 365-3356 ext. 2418 or via email at jan.wilgus@harlandfs.com.

UltraData® Enterprise OpenPath®

The UltraData® Enterprise OpenPath™ environment has changed. All vendors who utilize OpenPath web services for Application Exchange, and Member and Employee Exchange are now required to be licensed with updated agreements on file. To further enhance this offering, Harland Financial Solutions has developed a Vendor Services department to assist vendors who share common customers with us. Our Vendor Services program offers structure for integrating new vendor products, a single point of contact for support questions, access to UltraData Enterprise technical resources, advance notice of core product release changes that may impact our mutual clients' transactions and a secure test environment. In addition, Vendors who opt for an OpenPath license and agreement can take advantage of an increased opportunity to market to the entire UltraData Enterprise client base.

Client Benefits

Harland Financial Solutions understands the importance of its UltraData Enterprise clients to retain flexibility to choose what they determine to be the best solution for a particular business need. For this reason, we offer OpenPath which enables our clients to expand the range of third party applications used in conjunction with the UltraData Enterprise core system. By using industry standard .NET web services to exchange data from the core application, the member and employee involvement is simplified.

Tracking vendors and the products they use through our OpenPath technology reduces the drain on UltraData technical resources that, in the past, has taken away from our client projects.

Vendor Services offer a single point of contact for direct support vendors to streamline the third party integration process. This service eliminates the likelihood that clients will be 'caught-in-the-middle' with vendor issues and support. Until now, this has been an unmet client need. Below is an outlined a summary of the Vendor Services Program.

Vendor License Fees:

- One-time OpenPath License Fee that allows the vendor to sell into the entire UltraData client base
- Per product annual maintenance fee that provides 10 hours of telephone or email support the first year and five hours for subsequent years
- The option to purchase our SSO Specs (UltraData Enterprise clients only for Member/Employee Exchange)
- The option to purchase test slots based on individual testing needs
- Professional Services fee for any consultative services not covered in their agreement

Vendor licensing process and timeframes:

- For each quote that is requested by a client, the Client Manager – and sometimes even the client – will contact Vendor Services to find out whether or not the vendor is licensed prior to signing the quote.
- For existing vendors using OpenPath who are not licensed, Vendor Services will work with the vendor to transition them into a Vendor Integration Agreement.
- If it is a new vendor, Vendor Services will work with the vendor to identify their products and how those products may be supported through OpenPath. All new vendors are given the opportunity to have a formal technical review meeting with our OpenPath consultants to identify how the vendor's product could potentially be supported through the use of web services.
- The timeframe for the licensing is generally based on the size of the vendor's organization, willingness to join the program and whether or not a client is purchasing their product. Vendors have joined the program and become fully licensed within as little as three weeks, while other vendors may take months to finalize their Agreement.

Vendor Services Test Server:

- In the past, the test server was an open test server; all vendors could access the server at any given time. This resulted in vendors stepping on other vendors test data which required UltraData resources to support that environment.
- As part of the Vendor Services Program, we offer an enhanced secure test server that allows licensed vendors the option to purchase and schedule a test server time that is reserved specifically for their use.

Vendor Benefits:

- Notification of updates to web services
- A single point of contact for direct product support
- Access to a secure testing environment (may require additional fees)
- Access to UltraData Enterprise client base via established integration between UltraData Enterprise & Vendor's products
- Online access to OpenPath/Application Exchange/SSO Specifications

Through the Vendor licensed program, we can assist clients and vendors to take part in the evolution of an effective business-to-business framework that works for both sides.

Vendor Services

If you are considering any new vendor product, even if it's from an existing vendor, contact your Client Manager or call or email [Vendor Services](#) to ensure that all the proper Agreements are in place prior to signing a vendor quote. We encourage you to pass the vendor on to us, and we will work with the vendor to ensure that the new product is licensed so we can provide the appropriate ongoing support. Vendor.Services@harlandfs.com
800-365-3356 x 2046



We're on the web!

www.udusers.com



It's In There!

One of your best resources to keep track of all things UltraData is the web, and there's so much out there that if you haven't visited the UltraData System website lately, you need to go and take a look! Here are a few of the items that you can find at the click of a mouse:

Advocacy Services Metrics can be found at <https://www.ultradasystem.com/Customer/support/metrics.asp>. Each month Advocacy Services posts how they are doing on specific measures such as Service Level Objectives, time to answer, outstanding case load, and other vital areas. Check it out to see how your team is doing.

The Quick Reference Guide is available at <https://www.ultradasystem.com/Customer/support/qrg.asp>. This guide has the Hours of Operation, Holiday Schedule, Contact information for Advocacy Services team members, supervisors, management, after hours support numbers and also Service Level Objective explanations.

Release notes and upgrade documentation can be found at <https://www.ultradasystem.com/Customer/support/patch/softwareindex.asp>. Follow this link for all of the available releases and documentation for each.

COMING SOON: The new Knowledge Management System. Advocacy Services has been working on their new knowledge management system for nearly 12 months. During this time existing articles have been reformatted and verified for accuracy and usefulness and new knowledge articles have been created. The knowledge management system houses over 3000 articles. Watch for an e-mail inviting you to training. The system is designed to present you with answers as you log your issue using our Customer Interaction System.

Executive Committee



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