Bank of Stockton Turns to the Robot Products for Reliable, Error-Free Operations

By Erin Titcomb

It's no surprise that the global banking business has been transformed by recent economic events and volatility in business environments. As banks set out to redefine priorities, reform business models, and reconnect with customers, they rely increasingly on their IT systems and processes to lower operating costs, improve productivity, and support critical business functions. It has become more important than ever for banks to have a consistent, reliable, automated IT infrastructure. This allows employees to focus on innovations that bring true value to the customer, rather than worrying about the effectiveness and efficiency of their data center operations.
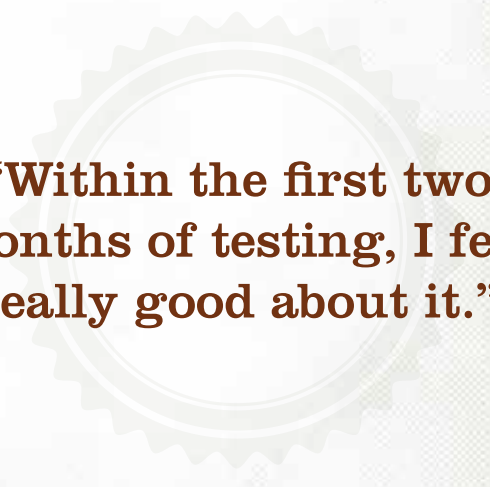
Smarter Banking through Automated Operations

Founded in 1867, Bank of Stockton has always been at the forefront of banking technology innovation. With 17 branches in five counties across central California, Bank of Stockton is known as a community bank with a reputation for continually investing in new technology-based products and services to better serve its customers. Whether working to attract and retain customers, protect privacy, or ensure regulatory compliance, Bank of Stockton is focused on optimizing their technology systems by enhancing manageability and boosting productivity through automated systems.

Bank of Stockton currently has two IBM System i® 520 partitions running IBM i 6.1. They use Fiserv CBS applications to manage the four core processing environments—production, training, new release, and backup. The bank set out to move toward a "lights-out" environment and implemented a combination of Help/Systems products—Robot/SCHEDULE,® Robot/CONSOLE,® and Robot/ALERT®—in all of their core environments to save time and money through automation.

Jim McDaniels, Assistant Vice-President and Computer Operations Manager at Bank of Stockton, was recruited a few years ago to assess operations, define future goals, and determine the most effective strategies for achieving those goals. When he joined the organization, Jim used his expertise to implement the Robot products and establish a flexible and adaptive IT infrastructure.

"When I started at Bank of Stockton, we used the Robot products in only one of our environments," explains Jim. "After I joined the team, we expanded Robot/SCHEDULE, Robot/CONSOLE, and Robot/ALERT to all four environments. Since we've implemented them, approximately 95% of our run book is automated. Within the first two months of testing, I felt really good about it. We've been extremely happy with the products ever since."

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Accomplish More in Less Time

When it comes to banking, there are clear benefits to investing in automating operations. Transactions are processed at night, when the bank isn't dealing directly with customers, so the bank can produce reports, statements and notices, and have them ready for customer distribution or online access the next morning.

By the time a bank opens in the morning, the night processing is complete and the systems are ready for the next round of transactions. Bank of Stockton implemented Robot/SCHEDULE to automate its job scheduling and batch job management. Jim has noticed numerous benefits, including a significant reduction in the time required for batch processing and fewer errors.

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As Jim describes it, "Our goal is to make our computer systems run as independently and effortlessly as possible. Now, we are able to keep human hands off a lot of the processing and have Robot/SCHEDULE manage the core application. When our processing finishes at the end of the day, we perform a reactive function in Robot/SCHEDULE that causes every subsequent application to react and process all the way through. We still have night operators, but their sole purpose is to watch for errors and print reports or other documents. They don't have to interact with the system because everything is event-driven from beginning to end."

The consistency provided by Robot/CONSOLE, the message management and resource monitoring software, has offered another way to manage incoming QSYSOPR messages, and monitor resources and system logs. Not all messages are important and critical messages could be missed among thousands of less important ones.

Bank of Stockton uses Robot/CONSOLE to answer recurring messages that don't require an operator response. For example, if the system is generating a report and it exceeds a certain number of pages, the system is set up to question the length of the document. Robot/CONSOLE can automatically grant the program permission to continue, rather than make it stop and wait for a response.

"Many of these messages were handled by humans before automation," explains Jim. "A lot of the time, people answered a message incorrectly, resulting in chaos the next morning when reports were blank or programs were cancelled. Before automation it was a mess—a total nightmare. Now, everything has changed."

Jim and his team have found that Robot/ALERT, the notification software, is a critical component of message management. Robot/ALERT sends a message to the night operator when a problem occurs. If the night operator doesn't respond within five minutes, Robot/ALERT escalates the message to the people on call until someone responds to the situation.

Jim explains how things run more smoothly now. "One thing that changed for us with Robot/CONSOLE is consistency. Now, certain messages are always answered the same way, rather than having multiple night operators who might answer questions differently. And, the people on call now get a good night's sleep."

Let Robot Do It

Jim and his team agree that the benefits of using the Robot products—saved time, reduced errors, and improved productivity—are well worth the cost of implementation. The effectiveness and intuitiveness of the products give them complete confidence in their operations and allow them to focus on new innovations and initiatives for increasing customer satisfaction.

"What we like most about the Robot products is the complete trust we have in their accuracy and performance. The reliability is second to none—it's almost as if we can set everything up and not worry about it again. Every time we encounter a new situation we think, 'Can we put it in Robot? Can we schedule it?' We are always thinking of ways to schedule something. We like to let Robot do it."