



keynotes™

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Linux Migrations Update

From the earliest stages of its design, KeyStone has been developed to be the most advanced and nimble credit union core processing solution available to help our credit union partners take advantage of ever-evolving technology. One of the ways Correlation has honored that commitment in recent years is by expanding into multiplatform support with the addition of support for the Linux operating system.

For our clients, multiplatform support offers greater flexibility in hardware solutions while providing the same KeyStone experience, meaning you have more deployment options than ever before.



Some of Correlation's clients have opted to host KeyStone on Linux since we began offering migrations to Linux for existing clients last fall. Nutmeg State

Financial Credit Union in Rocky Hill, CT was one of the first to complete a migration, concluding the project last November. According to Nutmeg State FCU's Systems Engineer Shayne White, the biggest influences on their decision to move KeyStone to Linux were the increased scalability, the efficiency of having backup servers virtualized, and having fewer pieces of hardware to maintain.

"There wasn't a single hiccup with our migration. Correlation provided us with a detailed project plan and the guidance we needed to complete the project without a big impact on our internal resources," shared Shayne. Nutmeg State FCU's efforts for the project were primarily focused on preparing data and servers, ensuring that all routine updates to KeyStone, Db2, and AIX were performed in advance, and data validation post-migration. As the credit union plans for infrastructure upgrades in the future, they anticipate those projects will go even more smoothly now that they have migrated KeyStone to Linux.

"We always need to be prepared for growth, so the ability to scale up in a matter of just an hour or two is extremely meaningful to us," added Shayne. "We have already scaled up since the migration – with one click on our end, the resources were assigned, and we were up and running. Since then, our

staff has reported an increase in processing speed, allowing us to take care of our members more efficiently."

There are certainly many factors to take into consideration before a migration. If your credit union is interested in exploring a migration to Linux, the ideal time to do so is typically when you reach the point of refreshing your hardware. Because KeyStone and its features are the same across platforms, whichever combination of operating system and hardware your credit union chooses, you will have access to all the same functionality and unmatched reliability.

Please contact your Client Relationship Manager if you would like more information. 📧



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Note from the President



I couldn't be more pleased about the way that Corelation has started off 2023. Our conversion, merger, and special project teams hit the ground running with a series of successful projects culminating in the first quarter. Our support team remains as dedicated to our clients as ever. Our development pipeline is full of innovative, impactful enhancements, and is now overseen by our new CTO, Dawn Sirras, who has already proven herself to be the perfect leader to push us forward as an organization. And in terms of new sales, well let's just say I couldn't have hoped for anything bigger than our recent partnership with Mountain America Credit Union.

On the one hand, converting and supporting an institution of MACU's size will be unprecedented for Corelation, as their 1.1 million members and nearly \$16B in assets easily set a new bar for our client base. We have worked closely with our new friends from Utah to define a special approach to honor the unique nature of the work ahead, creating a custom project plan designed to mitigate risks at every step. And we're pleased be joined on this project by Cornerstone Advisors, adding complementary experience and perspective along the way.

On the other hand, I can't help but express my confidence in our ability to knock this opportunity out of the park. Corelation is built for this, and we have been preparing for today since we first opened our doors. The KeyStone system is advanced and flexible, and it is poised to remain on the cutting edge no matter what direction technology takes us in the future. Our processes are tried and true, allowing us to accept this challenge knowing it wouldn't impact our ability to support our existing customers. And most importantly, we Corelatives are capable, meticulous, and passionate about the work we do to serve our clients and their members.

Welcoming MACU to our community represents a sizable step up for us, but if you consider our history this is just the latest example of such ascents. We stand ready for the trek ahead, and I look forward to this next leg in our journey.

Sincerely,
Rob Landis, President, Corelation Inc

Employee Spotlight: Katie Batchelder, Analyst Services Manager

Katie Batchelder was working as a sports producer in Chicago when she received a call from Theresa Benavidez about expanding Corelation's education department. Due to Katie's experience in the fast-paced sports industry, Theresa thought she'd be a perfect fit. Turns out, she was right.

As one of Corelation's first 50 employees, Katie has played a significant part in the company's success through her numerous roles and contributions over the past 9 years. Though she was new to the credit union industry, Katie has advanced within the company through hard work and dedication. Starting off as a trainer in Education Services, she quickly became an Education Development Strategist. Then she moved to the technical side of the company as a Technical Writer which led her to pioneer the Quality Assurance department. Having worked as a Quality Assurance Analyst for some time, she has now moved up to the role of Analyst Services Manager within the Software Services department.

Throughout her time at Corelation, Katie has established genuine connections with clients. "I really value the partnerships we have and relationships we've formed with clients because I've had the opportunity to see their hard work before, during, and after conversion and understand what challenges they may face. My goal is to provide

solutions that work best for them in order to keep their members happy."

Katie has been at Corelation since the beginning, so she knows there is a lot to love about working here. "Corelation's family-oriented culture is what I like most, it's a breath of fresh air. The 'work hard play hard' motto is important here and I am so fortunate to have formed lasting friendships and to work with an amazing team that embodies our company values every single day."

For Katie, the best job of all though is her newest one: being a mom. In addition to being a new mother, the California native enjoys volunteering for military organizations, playing golf, and savoring craft beers with her husband in San Diego.

Thank you, Katie, for all you do for our team and our credit union partners! 🍷



KeyStone Tips & Tricks: Roles & Privileges Best Practices

Maintaining security is so important in your credit union's day-to-day operations, and KeyStone offers a variety of security options that can help provide peace of mind.

One layer of security in KeyStone allows the flexibility for your credit union to define employee access and restrictions by the user's role. For ease and efficiency of user setup, granting privileges within KeyStone is done using 'roles' based on the employee's job function. Rather than assigning privileges to each staff member individually, you can assign multiple users to each role.

KeyStone's roles are hierarchical, allowing for more senior positions to use other roles as a foundation to expand upon. Typically, each department within the credit union creates its own base role, building higher level roles on top of it and granting them additional privileges. Using tellers as an example, the roles can be structured so that a 'Teller' role is granted the basic privileges required for that position. Then that Teller role can be used as a base for other roles such as 'Teller II' or 'Lead Teller', which can do everything their base role can do plus the additional permissions assigned to their specific role.

To grant these privileges, KeyStone has a wide range of 'security events' built in that act as triggers to determine whether an individual user is allowed to perform a specific action, including transaction types and file maintenance. Each security event can be granted or denied by individual role, allowing your credit union to customize privileges to match your operating procedures and policies. KeyStone comes with many standard security events and your credit union can create additional custom security events.

As new standard security events are added to KeyStone, you'll find a summary of these changes in the release notes. We recommend you keep up to date with the [latest KeyStone release notes](#)* so you can grant or deny privileges for any newly released functionality.

Standard security reports included with KeyStone allow you to review assigned privileges. The role privileges report displays all privileges assigned to a specific role, and the user privileges report allows you to see all privileges individual users have through both their role and base roles.

Learn more about roles and privileges setup and maintenance [on Confluence here](#)*. 📄

**Confluence access required*



Park View Federal Credit Union has a major cause for celebration this year, as they have been announced as one of the winners of the 2023 Best of the Best awards for Best Consumer Loan Experience and Best Transaction Experience by MemberXP, a prominent CX program provided by CU Solutions Group. This prestigious recognition is particularly exceptional because it is given to credit unions that provide outstanding service, as evaluated by their members. [Read more here](#) about their esteemed recognition.

Upcoming Training & Seminars

For the full list of upcoming Corelation training offerings and to register for courses, [click here](#). (Confluence access required)

Disaster Recovery

April 20th
12-1pm PST

sponsored by



Operational Enhancements

May 10th
12-1pm PST

Fees Best Practices

June 13th
12-1pm PST

Back-Office Technical Training

KeyBridge Training
April 5-6

Beginner Jaspersoft Reports
(with SQL Basics)
April 11-13

Batch Scripting Training
April 18-20

Advanced Jaspersoft Reports
May 2-4

KeyStone Server Administration
May 10-11

UI Scripting Training
May 23-25

Fundamentals of Agile & Scrum
May 23

Beginner Jaspersoft Reports
(with SQL Basics)
June 13-15

KeyStone Server Administration
June 21-22

Beginner Jaspersoft Reports
(SQL Experience Required)
June 28-29

What's Up South East User Group?

Collaboration plays a vital role in making the credit union movement unique, and the Corelation client community is a prime example. Credit unions running KeyStone can benefit from networking and resource sharing by joining one of the regional client-led User Groups that provide occasions to connect with peers and exchange ideas.

Since collaboration and sharing best practices among users in the region are the main purposes of the KeyStone South East User Group (SEUG), the SEUG strives to organize both in-person and virtual meetings regularly to unite the community.

In-Person Social Hour – May 31, 2023

For anyone planning to attend the Corelation Annual Client Conference in San Diego this year, stop by SEUG's in-person social hour on Wednesday, May 31st! This social hour is an excellent opportunity for individuals to gather, network, and enjoy themselves in each other's company.

2023 Virtual Meetings & Corelation Client Group Community Forum

In addition to the in-person social hour at the Corelation Client Conference, the SEUG will also host three webinars throughout this year. The first event will discuss batch

scripting, business intelligence reporting, and more on April 19th. The next virtual discussion will take place on July 19th and will discuss in-house card solutions. On September 19th, the final webinar of the year will cover the subject of current cyber security trends. Invitations for upcoming sessions will be accessible through the [Corelation Client Group Community Forum](#).

Upcoming South East User Group Virtual Events

Batch Scripting, Business Intelligence Reporting & More	In-House Card Solutions	Cyber Security Trends
April 19th at 1:00pm CT	July 19th at 1:00pm CT	September 19th at 1:00pm CT

How to Get Involved

It's important to note that all Corelation clients are welcome to participate, whether you're in the South East region or beyond. The SEUG Board of Directors put it best: "We're all one big family with KeyStone and all are welcome!"

To become a part of the South East User Group or any other KeyStone User Group led by clients in your region, [get in touch*](#) with one of the board members or connect via the [community forum](#). ▣

**Confluence access required*

Preferred Partner Spotlight: AvidXchange

Keeping Pace with Innovation to Ensure Regulatory Compliance

For a full list of Corelation partners, [click here](#).

The Elevated Role of Compliance in Financial Services

Compliance has emerged as one of the most pressing challenges facing the financial services industry. While the actual rules and regulations haven't significantly changed, a volatile business environment that's wrought with complexity has created a demand for more effective compliance and smarter ways of ensuring it.

AP Automation Drives Compliance and Efficiency

Many credit unions are adopting automation technology to help with regulatory compliance. Automation streamlines reporting and enables compliance teams to field internal and external requests by giving them reliable access to up-to-date data.

Adopting accounts payable ("AP") automation solutions helps organizations centralize processes, enable remote work and monitor compliance. The right technology stack can also allow financial institutions to reduce the risk of check fraud and

strengthen vendor relationships. This will be increasingly important as credit unions look to vendor consolidation to create efficiencies and improve cashflow management.

AvidXchange Helps Credit Unions Transform Their AP Departments

AvidXchange is a leading provider of AP automation software and payment solutions for middle market businesses and their vendors. AvidAscend is a best-in-class invoice-to-pay software solution to more than 150 credit unions.

With seamless integration to Corelation KeyStone, AvidAscend provides OCR invoice technology, automated approval workflows, streamlined vendor payments and more.

AvidAscend allows credit unions to reduce the number of paper-based workflows in their accounting processes and streamline AP via one automated, cloud-based solution. ▣



"Moving to AvidXchange has allowed for a truly streamlined process and much more functionality; we love that vendor invoices are emailed right into Invoice Inbox and that the program automates much of the data entry. We are so excited for the partnership between AvidXchange and Corelation and for the opportunities that this will bring!"

Kim Caldwell, VP of Accounting & Finance,
Sun Community Federal Credit Union

Corelation Client News & Success



Reliant Credit Union remained steadfast in their mission to support local students by providing sneakers to those in need. Reliant collaborated with area schools and organizations to help distribute over 260 pairs of shoes in 2022 to children through their Feet Forward program. Since the beginning of this initiative in 2017, the credit union has donated 1,824 pairs of shoes, representing a total investment of over \$51,000 towards assisting local children. [Learn more here](#) about their mission and the Feet Forward program.



This year, Ascentra Credit Union paid tribute to Dr. Martin Luther King Jr. by contributing \$50,000 to the Friends of MLK (FoMLK) organization in Davenport, Iowa to aid in the construction of a \$1.2 million park in MLK's honor. This park will serve as a communal gathering place for education, remembrance, celebration, and community building. This donation will assist in achieving their fundraising target for the creation of the first official memorial of Dr. Martin Luther King Jr. in Davenport, referred to as the MLK Park. Check out the [complete story here](#).



Welcome, New Clients

(Through March 1, 2023)

Mountain America Credit Union
\$15.8 billion in assets
Sandy, UT



F&A Federal Credit Union
\$2.2 billion in assets
Monterey Park, CA



Market USA Federal Credit Union
\$136 million in assets
Laurel, MD



Cedar Point Federal Credit Union
\$741 million in assets
Lexington Park, MD



Towpath Credit Union
\$184 million in assets
Fairlawn, OH



Alcoa Tenn Federal Credit Union
\$366 million in assets
Alcoa, TN



RelyOn Credit Union
\$92 million in assets
Kaufman, TX



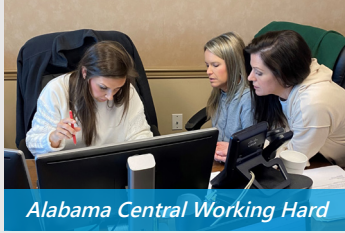
Pearl Hawaii Federal Credit Union
\$453 million in assets
Waipahu, HI



Conversiongram



Alabama Central Conversion HQ



Alabama Central Working Hard



Santa Visits Sno Falls CU



Alabama Central Validation Team



Alabama Central Team



Festive Decor at Sno Falls CU



Alabama Centra Making it Happen



Validation Team Working Hard at Otero FCU



Conversion Weekend Team at Alabama Central CU



Conversion Ready at Otero FCU



Welcome Otero FCU



Otero FCU Accounting Team



Lunch Time at Alabama Central



Smiles at Sno Falls CU



More Smiles at Otero FCU

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