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# Merger of Federal Corporate Credit Unions Heightens Efficiencies for Data Protection and Recovery of Mission-Critical Systems

**CASE STUDY**

## Client: Alloya Corporate FCU

**INDUSTRY: FINANCIAL SERVICES**
**SOLUTION: CLOUD**

Embracing 25% of U.S. credit unions, with assets over $3 billion, Alloya is a "credit union for credit unions." Alloya and its wholly-owned credit union service organization, Balance Sheet Solutions, LLC has 180 employees at locations in Warrenville, IL (headquarters); Southfield, MI; Albany, NY; Westminster, CO; and Covina, CA. Alloya provides critical cooperative services including investment, financial and lending to over 1,600 member credit unions from coast-to-coast. Alloya offers a dependable line of credit, secure and efficient product access, settlement and unparalleled commitment to its members.

OnX and Alloya have been working together for a number of years across a variety of projects. OnX has strengthened Alloya's community of credit-union members with mission-critical infrastructure solutions. These services have included managed hosting, dedicated private cloud, multi-tenant cloud, data backup and disaster recovery (DR) in a dual, fully certified data center environment.

## ▎Challenge

Alloya merged with System United Corporate FCU (SunCorp) on February 28, 2015. The combined corporate entity provides investment, financial, lending, and correspondent services to more than 1,600 natural person credit unions across the U.S. Together, they serve 25% of the nation's credit unions, making it the largest in the U.S. in terms of the number of member institutions served.

SunCorp's back-office processing system was based on Alloya's CorPower application; from a systems integration perspective, the merger would deliver efficiencies immediately. But the overall transition needed to be smooth, keeping SunCorp's member credit unions happy with the move to the Alloya environment. OnX was brought in right at the beginning to help with planning the migration approach during the cooperative due-diligence process. OnX, working with the Alloya and SunCorp teams, identified and documented what was currently running; what would need to be absorbed into the new Alloya environment; what would be retired; and what systems SunCorp was using, such as an important check-imaging solution (based in Colorado) that would need to live on as a "new" part of the merged structure.

*OnX and Alloya have been working together for a number of years across a variety of projects, guided by mutual respect and substantial accomplishments.*

# Solution

Detailed planning and testing ensured SunCorp's successful migration, enabled by OnX's carefully defined process:

> OnX provisioned a new production environment to service member credit unions transitioning certain SunCorp physical infrastructure to highly secure virtual private cloud infrastructure in Naperville, IL.

> Because OnX was working under a tight, three-day migration window, the build-out/ migration process required preliminary detailed mapping and documented analysis and testing of the pre-staged workloads system by system to prepare for re-integration when SunCorp employees transitioned into the Alloya domain and leveraged other Alloya systems. This pre-production testing and cutover process was repeated several times, enabling OnX to precisely address priority requirements and network interdependencies associated with the assigned cut-over day, thus assuring smooth cut-over and access to applications for the corporates and credit union members.

> Before actual cut-over, OnX initiated an Initial Mock full-switch cut-over to substantiate documentation and make sure planned procedures were solid. This activity was followed by an Actual Mock cut-over, the day before the live date. This involved a full test right up to production without pushing into a live environment. The Actual Mock cut-over also included a DR test as OnX had configured Zerto software to replicate systems and CommVault software to back up data to OnX's data/hosting center in Indianapolis, IN.

> Actual Cut-Over Day, opening up full production in Naperville, IL, went smoothly, with OnX following the no-hitches migration playbook. Attention to finite details and experience in integrity validation streamlined the cut-over initiative.

The considerable success of SunCorp's migration and DR testing has allowed Alloya to pursue a strategy of testing consolidation and continuous improvement of recovery times and points to reinforcing the resiliency of the full corporate environment as well as individual systems germane to Alloya (with those from SunCorp).



> OnX worked with Alloya to consolidate three DR test environments for the applications it supports for member credit unions, including Core Network Processing, Balance Sheet Solutions, TPG (Portfolio View), and PremierView. The topology of integrated platforms and technology included AS400 iSeries, Windows, VMware, SQL and DB2 databases.

> OnX planned to consolidate Alloya's dual front-end failover to ensure they could both run at the same time; this required new DR documentation and testing, which included applications pertaining to securities analytics and balance-sheet management.

> The entire successful process was done in one weekend versus two or three, thus validating the huge amount of planning effort centered on consolidating the existing testing documentation from previous tests and reducing the time commitments of the business users testing and the IT team.

> Strict discipline with change control was essential for test success. OnX was able to see clearly what worked and what needed immediate trouble-shooting, providing the information to update the documentation live during the process.

*Inspiring innovation through technology.*

# ▎Results

OnX leveraged its unparalleled collaborative approach with Alloya/SunCorp to upgrade and migrate SunCorp's computing environment, while incorporating cutting-edge system resiliency and data backup, to provide smoother computing operations and continuity confidence. OnX-driven technology is not about compute, storage and applications; it is about a disciplined approach to growth and creating a culture of working as a unified team.

Some specific benefits resulting from OnX's recent activity with Alloya include:

> A fully managed production and DR environment for which Alloya can test the recovery when it is right for them, relegating documentation and full-recovery adjustments to OnX, thus keeping staff focused on core business for members.

> Systems failover is nearly "production seamless" to the organization due to Zerto and MIMIX software, which replicates iSeries AS400 and Windows virtual machines between OnX's virtual machines between an OnX data center and Alloya's Indiana facility. Geographic diversity reduces risk and — with OnX's experience and capabilities — enables more flexibly in testing.

> Marshalling the technology intelligence, best practices and multi-level certification of OnX, Alloya has greatly increased availability, reliability, and corporate efficiencies, while reducing risk and improving the strength of the newly merged corporates for their respective members. One plus one equaled three!

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