

# Edfinancial Services

Edfinancial Services gives customers real-time web access with Micro Focus® Verastream® Host Integrator.

## Overview

Edfinancial Services is a top-ten provider of student loan services, administering more than US\$6.4 billion in loans. Headquartered in Knoxville, Tenn., Edfinancial partners with banks and state agencies to provide customized financial solutions for the education sector.

When the company, a longtime Reflection® customer, decided it was time to update its online information access process, it chose Verastream Host Integrator for the job.

## Challenge

College financial aid offices had been using web-based translations of 3270 screens to access Edfinancial data, which resided on a third-party mainframe. This process was unsatisfactory, according to Brian Adkins, vice president of e-business solutions at Edfinancial, because it did not provide real-time results.

**“The Verastream solution ran so well, we wondered if our monitoring software was working right!”**

### BRIAN ADKINS

Vice President of E-Business Solutions  
Edfinancial

The system was also awkward to use. Frequent changes to student data (such as address, enrollment status, or loan amount) required financial aid staffs to navigate a web application and fill out a form that linked to a green-screen procedure. The process was so cumbersome that people inevitably wound up phoning in their changes, putting a strain on Edfinancial's call center.

According to Adkins, “Lack of programmatic access had been a major inhibitor to progress.” And because its mainframe system was outsourced, Edfinancial needed a solution that was neither host resident nor invasive. The ideal tool would also be easily learned by .NET developers.

The Edfinancial IT staff knew that Verastream Host Integrator provided strong support for Microsoft .NET. When we performed a proof of concept, Edfinancial saw how easily Verastream could transform legacy applications into service-oriented architecture (SOA) assets.

## Solution

“The Attachmate (now part of Micro Focus) staff was able to come in to our system, pull up our screens, create models, and produce a simple web UI, inside the morning of the first day,” said Adkins. “And instead of using a demo system back at Attachmate, they did it with our data and our applications.”



## At a Glance

### ■ Industry

Financial Services

### ■ Location

United States

### ■ Challenge

Customers needed real-time access to mainframe-based loan data.

### ■ Solution

Use Verastream Host Integrator to create services for a new online loan-management application.

### ■ Results

- + Gave internal and external users easy web access.
- + Used the customer call center more efficiently.
- + Integrated with BizTalk Orchestrations for automatic updates.
- + Reduced the typical six-screen navigation to one integrated interface.

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Matt Timbs, senior software engineer at Edfinancial, who gathered the project requirements, admitted, “I couldn’t believe that I didn’t have to write code because that’s what I’m used to.” He began working with Verastream by creating a business object model behind the mainframe application and mapping specific data. He set up a process in which a data tier web service would call Verastream and provide the raw data from the data set working with the objects in C#.

To deliver the initial application, the IT team captured data from the loan origination system and loan servicing system housed on the mainframe. “We were sometimes hitting 20 screens from different systems to get to the details for a single loan,” said Adkins. Verastream’s point-and-click design tools quickly abstracted data from those multiple sources to build Edfinancial’s new loan-management application.

With the Verastream solution in place, internal and external users can make immediate edits without bypassing mainframe business logic. Edfinancial can also easily customize the web application to meet user needs or skills.

Verastream Host Integrator exposes legacy functions as reusable services that can be accessed by Microsoft BizTalk. At Edfinancial, Verastream-generated services are incorporated into BizTalk Orchestrations for managed business processes and workflow. If one of the campus offices has to make a loan change, Verastream captures the data and packages it into BizTalk. Then BizTalk decides if that change should automatically update in other records across the enterprise.

## Results

Timbs said that before Verastream Host Integrator, a pre-disbursement loan cancellation could take up to three minutes to complete. “Now a cancellation, plus two additional changes, can be made in less than half that time,” he said. Thanks to Verastream’s programmatic approach, a task that previously required navigation of six green-screen translations now requires only one integrated interface.

Since creating its loan-management application, Edfinancial has rolled out additional applications with Verastream Host Integrator. Those solutions are used by several different groups in the organization, including call center, loan origination, loan processing, and loan servicing staffs.

Instead of taking an all-or-nothing approach to their challenges, the Edfinancial IT team built small-scale versions of both the user interface and backend. They’ve been incrementally adding functionality to the model ever since. “Save yourself the pain of building a new infrastructure because you can do that part, out of the box, with Verastream,” advised Adkins. “Then, you can spend your time and resources building the actual solution to your problem.”

Due to demand for the improved applications, the Edfinancial team implemented Verastream Host Integrator load balancing. “We expected it to be hit pretty hard,” said Timbs, “but the Verastream solution ran so well, we wondered if our monitoring software was working right.”



### Micro Focus

#### UK Headquarters

United Kingdom  
+44 (0) 1635 565200

#### U.S. Headquarters

Seattle, Washington  
206 217 7100  
800 872 2829

Additional contact information and office locations:  
[www.attachmate.com](http://www.attachmate.com)