Major Global Investment Firm

A major global investment firm solves mainframe application lifecycle challenges with Micro Focus.

Overview

A major financial services corporation operates multiple world-class investment management groups, all supported by a single global platform. The company has thousands of employees and serves customers around the world with its investment solutions and services.

Because the financial services industry is so highly regulated, the company wanted to streamline, automate, and audit a complex release management process. After adopting Micro Focus for change management and application lifecycle management (ALM), the customer was able to implement application changes with improved speed and accuracy at a reduced cost.

Challenge

The company needed to replace homegrown, manual processes with a dedicated mainframe release management solution to reduce complexity, improve efficiency, and meet compliance requirements for complex and massive release management processes in a highly regulated industry.

MICRO FOCUS STANDARDIZES SOFTWARE RELEASE MANAGEMENT FOR GLOBAL FINANCIAL SERVICES PLATFORM

For over 50 years, the company has provided financial services and solutions to support financial investment management groups who, in turn, work with financial advisors and their clients. The IT department must support a variety of financial products and services with a global technology platform while complying with state, federal, and industry regulations, including controls around software development, access, and security.

The company manages massive release management processes in support of eight releases a year, as well as several regulatory compliance and special project releases a year. Previously, managing such a complex application development process and continuous release cycles reduced efficiency of dedicated people and budget resources.

To address regulatory requirements and standardize the process, the company wanted a solution that could streamline release management and audit management for mainframe

At a Glance

■ **Industry**

Financial Services

■ **Location**

Undisclosed

■ **Challenge**

The organization needed to replace homegrown, manual processes with a dedicated mainframe release management solution.

■ **Solution**

Use ChangeMan ZMF to streamline approvals, auditing, and real-time notification of changes.

■ **Results**

+ Introduced the ability to develop and implement application changes with greater speed and accuracy
+ Improved time to market, in some cases reducing six month processes to three months
+ Anticipated release dates set and audits performed twice weekly
+ Automated code reconciliation and other manual processes, refocusing dedicated staff hours from manual reconciliation and install to improving accuracy, reducing downtime, and minimizing negative impact of promote and install

development. After evaluating various solutions, the customer selected Micro Focus® ChangeMan ZMF to integrate the mainframe software lifecycle and automate steps from application development through testing and into production.

MICRO FOCUS ADDRESSES COMPLEX MAINFRAME APPLICATION DEVELOPMENT WITH CHANGE MANAGEMENT AND INTEGRATED AUDITING THROUGHOUT THE ENTIRE LIFECYCLE

Prior to 2007, the company relied on home-grown manual processes to accommodate development, audits, and change management. Code reconciliation and defect fixes were entirely manual, with 5–10 releases In various testing stages at any given time. The process was complex, unpredictable, and inefficient.

The customer implemented the Enterprise Release Option (ERO) for ChangeMan LVIF to simplify the maintenance and management of such a high volume of simultaneous releases. ERO adds automation to the process, including consolidation of migration paths into an integrated environment, release audit with automatic resolution of out-of-sync conditions and automatic determination of copybook (upward of 100), and load module concatenations for build processes.

Unlike other tools that only allow audits at the end of a lifecycle, ChangeMan ZMF lets you perform audits at any stage of the lifecycle to identify issues early in the process when they are easier and less expensive to remediate. Before adopting ChangeMan ZMF, the company needed one or more days to resolve a production issue. Now, production installations are completed quickly over a 12-hour window on weekends. In addition, no production installation issues have been reported in the past two years.

Solution

Using ERO with ChangeMan ZMF, the company can set anticipated dates for releases and run audits twice a week. The product automates code compare and retrofit, which has reduced follow-up programming hours significantly. Audits are complex, with intertwined applications and huge copybooks pulled by many source components—upward of 100.

The company relies on the ERO audit, designed to catch errors early so that they can be resolved quickly.

Every step of the strict release approval process is streamlined from compare and retrofit to audit, promote, test, and production install. Whether it's one component or thousands for a major development project, ChangeMan ZMF gives the customer confidence in release management planning and control in a mainframe environment.

Gaining streamlined approvals, auditing, and real-time notification of changes, the company quickly realized significant benefits, including developing applications faster as a result of reducing the complexity of some portions of development and replacing manual processes for test defect resolution and promote. Additionally, the company achieved significant savings in development lifecycle costs via a combination of customization, ChangeMan ZN1F, and ERO.

One employee commented, "Time to market has improved considerably in some cases. For example, when dealing with noncritical production defects, we have recognized 50% in time to market improvements. What took six months before, now takes us three."

Results

- Ability to develop and implement application changes with greater speed and accuracy
- Improved time to market, in some cases reducing six month processes to three months
- Anticipated release dates set and audits performed twice weekly
- Automated code reconciliation and other manual processes, refocusing dedicated staff hours from manual reconciliation and install to improving accuracy, reducing downtime, and minimizing negative impact of promote and install
- Significant cost savings in development lifecycle overhead
- Higher level of quality assurance proficiency according to industry quality standards
- Quick production installs requiring only a 12-hour window on weekends
- No production issues caused by install problems in more than two years
- Automated complex management and audit process from development through test and into production for eight releases a year, as well as regulatory releases and special project releases
- Improved the integrity of the code migration process

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EMPLOYEE

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