

Nationally Owned Bank

Shorter development life cycle and enhanced security

Challenge

With many IT projects, both domestic and international, the Bank had many requirements to manage manually. These requirements would often be incomplete, lacking the basic information to appropriately direct the request. There was difficulty sharing requirements between different departments. Confusion arose when different versions of the same requirements were circulating around various departments for input. Finally, there was no consistent record of requirement changes, largely due to constantly changing market and business conditions.

The Bank was introducing a new core banking system and saw this as an opportunity to improve the quality of its requirements management. This would support the development of the new core banking system, playing an important role in the development life cycle as well as providing a framework for all future projects.

Solution

To provide full process flow management, the new requirements management solution needed to integrate with existing systems in the Bank, such as the Office Automation, Project Management and Test Management Systems.

Together with Micro Focus® Caliber, solutions from IBM and Microsoft were evaluated in a proof of concept. Following a thorough test, Caliber was chosen for its ease of use and design, enabling a fast introduction into the Bank with minimum training. Caliber's requirement displays are clearer and more user-friendly. Tabs are used to categorize requirements for very easy and clear viewing of the relationships between requirements and regulatory rules. Caliber's integration capabilities are second to none, with integration for commonly used tools as standard, and an easy-to-use software development kit so that Java or .NET-based applications can be integrated.

Soon after the decision to use Caliber was made, development and integration with other key systems were carried out and completed within three months. A dedicated requirements management team was introduced to promote the use of the Caliber system and to manage the new process flow.

Results

Prior to Caliber, the business team would hand requirements documents over to the development team. This manual process was prone to human error.



At a Glance

■ Industry

Banking

■ Location

China

■ Challenge

The bank needed a centralized requirements management solution that could integrate with key banking applications.

■ Solution

Use Caliber to centrally manage requirements.

■ Results

- + Shortened development life cycle
- + Improved team collaboration
- + Introduced sophisticated statistics and reporting
- + Successfully integrated with key banking systems

As part of the development for the new core banking system, all requirements were transferred into Caliber, including regulatory requirements, so that they can be managed centrally. The business team inputs requirements directly into Caliber, where they are retrieved by the development team, improving collaboration. Automatic Versioning within Caliber ensures both teams are always working on the latest version of a particular requirement.

By having such an effective impact on the system, Caliber is now used in approximately 120 projects with more than 800 users. It has managed 2,000 requirements to date with over 200,000 requirements data items held in its database of approximately 15GB.

The Bank uses Caliber's DataMart component to extract Caliber data into an SQL Server relational database from where dedicated specialists develop customized, in-depth statistics and reports.

As requirements were previously managed manually and often decentralized, it was difficult to get them validated and completed. A lack of understanding of relationships between different requirements made it hard to analyze the impact of requirements. Caliber clarifies this through its interfaces, and the improved process flow means requirements are completed much faster, and the development life cycle is significantly shortened.

Caliber supports role-based access, which means a flexible security model, essential for a banking environment where sensitive and confidential projects are managed.

The Bank has realized many benefits already and is looking forward to integrating further content into Caliber, including requirements templates, meeting minutes, etc. It hopes that Caliber will become the center for all requirements-driven information, enabling all departments and teams to review and share it.



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