



Erste & Steiermärkische Bank d.d. automates the change request management process using Microsoft Team System

Overview

Industry: Banking

Customer Profile

Erste & Steiermärkische Bank d.d. (ESB) is part of the Erste Bank Group, one of leading Central European financial groups with more than 10 million clients and 200 years of banking experience. The Erste Bank Group is one of the best-positioned Banks in Central Europe, with trends indicating further business development and market position strengthening.

Business Situation

s IT Solutions, the IT department of ESB Bank, is an IT solutions provider responsible for the development and servicing of business processes, banking software, implementation and support to the Erste Bank Group in Central Europe.

Solution

Erste & Steiermärkische Bank d.d. deployed the Team Foundation Server 2005 and used it to implement its change requests business process.

Benefits

- Process automation
- Transparent information flow
- Different client tools available
- High fidelity status information
- More productive environment

Using Microsoft Team System and the Microsoft Team Foundation Server 2005, **Erste & Steiermärkische Bank d.d.** (ESB) automated its change request (CR) management process.

Change requests relate to the software used in the bank, most of which have been developed internally by s IT Solutions. In ESB, CR management is defined as a complex process composed of many different steps, where different stakeholders (various business departments, as well as IT department) influence the lifecycle of particular CR, according to their process roles. Each step follows a set of rules, meaning that different parts and different attributes of CRs have to be defined by certain business members, corporate roles or departments in given order during the lifetime of the CR. There is strong distinction between different process roles in the way they see and deal with CRs. Each department can edit only the fields they are concerned with in a particular step the CR is in. Different departments need to be able to access the whole solution differently – using desktop (Microsoft Office and Visual Studio) and web (Team System Web Access) client tools.

The implementation of the CR process was to satisfy quite different needs of various kinds of users inside the Bank, some strictly business oriented and some more technical. This caused the s IT Solution, the IT solutions provider of ESB, having consulted with Ekobit on decisions for installing and adopting the Team Foundation Server and Team System set of tools, to automate the whole change request management workflow in the ESB business process. Extensibility and openness of Team System architecture was the necessary prerequisite which made successful implementation possible.

Stakeholders Opinion

Significant growth of IT business within ESB (the number of people directly involved in application development more than doubled in three years) required new methods of tracking and steering the application development process. We searched the market to find an adequate tool for this problem, and Microsoft Team System was by far the most suitable choice in terms of simplicity and flexibility.

TeamSystem and Ekobit helped us to achieve more agility in application development with less manual effort, as well as easier reporting, earlier issue escalation and less process errors – that is what we see and feel from the IT side. But more importantly, being an internal service provider, our users at the business side gained transparent insight into the development of solutions for their problems and needs, and smoother cooperation with us.

Siniša Pleše, IT Manager, ESB

About Ekobit

Ekobit is an independent software and consulting company specializing in providing ICT services and solutions using Microsoft technologies and platforms. Founded in 1992, Ekobit has gained considerable international experience in consulting, project management and application development in various vertical industries.

Situation

The change request (CR) business process in ESB was managed, performed and controlled in more or less manual manner. The state of each CR was registered in Excel tables, while all transitions and changes in the process of CR were done manually. All information related to CRs was exchanged by e-mail communication with no workflow automation.

CR business process itself was at the business level defined in detail, with exact rules, but there was no automation or automated validation that could speed-up the entire process and make it less error prone.

Solution

Ekobit Team System consultants installed and adapted the Team System according to the CR business process in ESB. Various customizations and extensions of the Team System were used to satisfy customer needs and to implement their set of business rules. Most of the changes were made in the Work Item Tracking System. A new work item type (WIT) was defined with the name "Change Request". Custom field definitions, layout and workflow definitions were created in this work item. More than 50 custom fields were used. The most challenging part of the WIT definition was the implementation of the new workflow. Together with ESB business analysts, Ekobit consultants defined a matrix with all possible transitions between the states in the process of CR and, for each transition, a list with the user roles and their particular permissions. As a reaction to the state change of the CR, an array of mail subscriptions for specific groups of employees was also defined. For example, a coordinator dedicated to a certain CR will automatically get an e-mail when any state change in his or her CR occurs. In order to make these subscriptions manageable in spite of large number of subscriptions needed, a custom tool was developed and used for their definitions.

To satisfy customer needs, some changes in TFS groups' definitions, default areas and iterations and some default work items were made. All of these changes were built into the custom process template. By creating new Team projects based on this template, ESB project managers easily incorporate all ESB specific functionalities in all new projects.

Benefits

Automation of the change request business process ensures that all steps in CR management are executed correctly and that all data related to the CR are accurate. Automation manages responsibilities, enforces transition rules and compulsory information in every specific step.

Automatic notifications drive manual involvement in the workflow. No CR can wait for a person or committee without them knowing that it is ready for processing. Since notifications are centrally managed, it was easy to test and deploy them together with the workflow itself. Transparent information flow – all employees, including all levels of management, benefit from the new system. Everyone is informed on the state of each CR at all times. Using the previous system, business users were sometimes unsure what was going on with their CRs. Now, there is always full fidelity of information on the state of requests and the corresponding responsibility in any given moment. Statistics and reporting are provided by TFS data warehouse capabilities.

Involvement of business users is essential. Previously, they took part but indirectly in the process. They were dissatisfied with their ability to influence what happens with change requests. This was the reason the Team System was chosen as the implementation platform. With an array of client tools supported and extensible architecture, the Team System made the frictionless involvement of business end users possible.