

CLARIVE[®]

By CollabNet[®]

Case Study

Orchestrate Releases across Tools & Countries

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Learn how Clarive allows you to manage your End-to-end release management process in a non-disruptive way, by orchestrating the current tools you like and fixing the gaps you have.

THE COMPANY

Banco Sabadell is Spain's fourth largest private banking group, which is comprised of different banks, brands, subsidiaries and part-owned companies covering all areas of the financial business sector.

The development of the group revolves around achieving a profitable growth that creates value for its shareholders through a strategy of business diversification. Businesses are evaluated periodically on the basis of criteria governing service quality, risk, efficiency, and profitability within a framework of an ethical and professional code and respect for the stakes of different interest groups.

ORCHESTRATING END-TO-END RELEASE MANAGEMENT AT SABADELL

The release management challenges at the bank were a result of the following initiatives:

1. An aggressive international expansion plan with the acquisition of banks in Mexico, UK and the United States.
2. A new initiative to accommodate such expansion with an offshore development centre in South America.

This has led to the introduction of different technologies, processes and a required change in time-to-release velocities in their delivery lifecycle. In an effort to standardize banking core management in different regions and consolidate efforts and results, a new banking core platform was chosen: BanTotal.

"We had a challenge to deliver Bantotal banking core changes from Uruguay to Spain and México. Clarive was the best tool for the job given its flexibility and power. Clarive's release automation exceeded our expectations, enabling quick deliveries, orchestrating testing with an HP Quality Center integration."

— *Susana Soler, Release Manager at Banc Sabadell*



In order to coordinate all application and service delivery efforts, all release management and QA teams were centralized in Europe, while user/stakeholder acceptance and validation testing (UATs) continue to occur at the local country level. This resulted in increased release complexity. As a result, the bank started a procurement project for release management automation to support them.

The bank's existing (called Brownfield), legacy technologies also played a key role in the RFP process. Initial phases were to be centered in the new (called greenfield) needs, but later phases had to tackle the rest of the bank's applications that are not part of the banking core.

The 3 key reasons why Clarive was chosen over the competition (IBM Urban Code, CA Lisa and Serena) in the process were:

- **Single tool solution for process delivery and deployment automation**, which meant reduced costs and implementation effort and delivery time;
- Process **flexibility to orchestrate everything** from demand to defect to QA and continuous deployment;
- **Platform coverage**, from Linux (their Banking core) to AIX, HP-UX, Mainframe (financial/reporting) to mobile/SOA/Omni channels.

The implementation project was broken down into different phases:

1. Greenfield banking core (5 months)
2. Governance controls and requirements cycle (8 months)
3. Brownfield delivery automation

Implementation of phase I started in July/2014 and was completed in 5 months.

Clarive adds significant value to the bank in the following areas:

■ END-TO-END TRACEABILITY

Having different offshore development teams each using their own defect tracking tool (Jira, XPM, etc.), and a user helpdesk based on HP Service Manager, it was a challenge to get end-to-end insight from a demand management standpoint. Releases could resolve and implement requirements and user stories from many different sources. Also progress reporting could happen in many different ways.

Using Clarive, they decided to perform incident management and defect tracking from within Clarive. Also user requirements were gathered from start to finish into Gap requirements and Gap group topics. They also saw the opportunity to include many more relevant delivery discussion topics part of the delivery cycle to increase end-to-end insight, including Releases, Projects, Associated

Tasks, Certification Cycle, Acceptance Cycle, Changeset , Bug/Defect, Test Case, Module/Application, Component.

Clarive allowed the bank to get **real-time dynamic insight** into the status of every delivery aspect, into who approved, who didn't, and also why. Users can now quickly navigate through the discussion topic hierarchy levels, avoiding information silos (created by the different tools used) maintaining an accurate inter-team real-time view which added a lot of value during on meetings and emails, because all teams and stakeholders could communicate based on a shared common view of the current situation. For instance, the development team can easily follow deliverables all the way to production, watching over the QA efforts as they evolve without having to access extraneous tools and complex, domain specific information. Clarive presents the key information in an easy to digest format to team members.

■ CENTRALIZED DELIVERY ASSET MANAGEMENT

Centralizing all delivered assets into one repository was a key requirement of the release management team. All delivered assets had to be formatted to fit a given artefact structure verified by Clarive directly when stored in the version repository (Subversion).

Not only software deliverables needs managing, Clarive also manages Rochade metadata documenting data changes, and development, QA and UAT documents managed in SharePoint, such as requirements, design and manuals. Linking them to different topics in Clarive promotes transparency and facilitates coordination between teams.

In this context, Clarive validates that all documentation is accepted, one by one, by every stakeholder with the delivery. That way deliveries follow release policies and best practices early on in the lifecycle.

■ QA AND UAT COORDINATION

Another challenge was to coordinate all different QA, validation and acceptance activities after each individual change was delivered by development in the most continuous manner. To do that, it was imperative to use Quality Gates that automatically link to tool results to verify and guarantee that key thresholds and checkpoints were attained by every individual delivery.

Clarive controls what is deployed to every environment using process entities at different levels, so that if a given requirement fails testing, only that requirement is rolled back, not the entire release. Clarive reconfigures the release accordingly, so that now only accepted requirements are deployed forward.

Test cases from HP Quality Center are orchestrated with Clarive so that all teams can access test results from a release or requirement. Clarive kicks off testing in HP QC when releases are deployed and HP QC reports back to Clarive results, acting as gates to the next environment and initiating demotion/backout automatically when failing.

■ DEPLOYMENT AND ROLLBACK

Assets being delivered had to be deployed in environments across continents at different speeds or given stages in the process. Banking core servers are numerous and need parallel, but scaled, deployment. That means DevOps engineers would verify (and finetune) automation according to the result of deploying the first node in the pool.

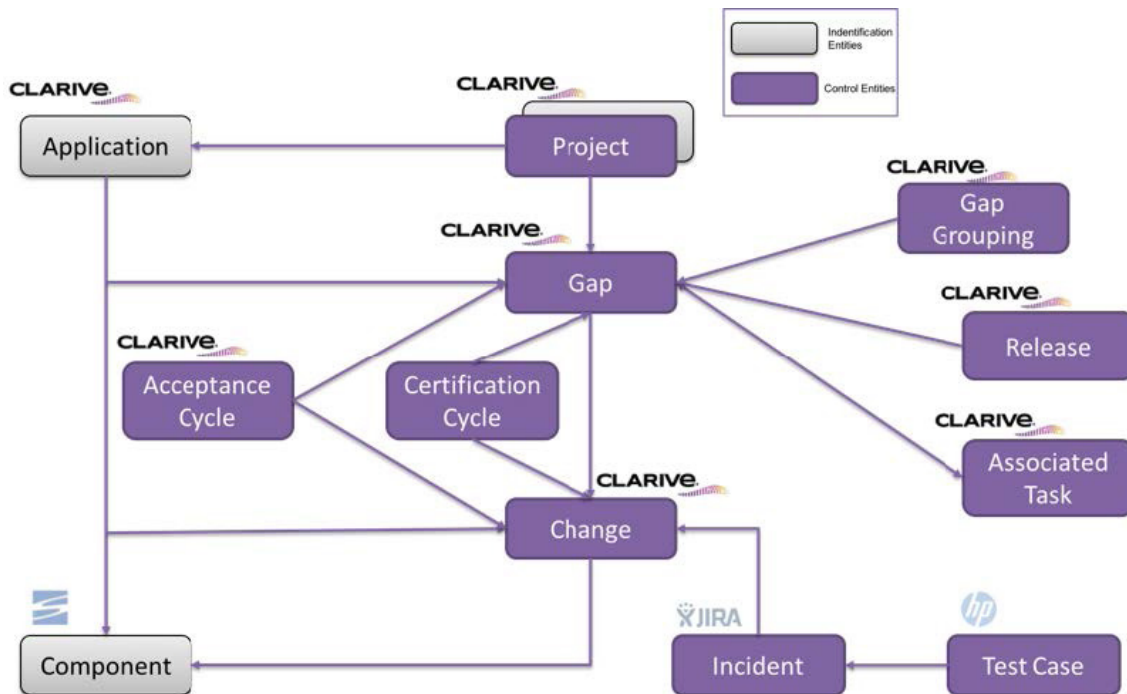
Deployment was heavily impacted by connection robustness, given the various branches and network complexities between USA-UK-LATAM-Spain. So Clarive checks for connection problems continuously and adapts to it (if possible) or pauses/notifies DevOps engineers of the current status of each and every stage in deployment for manual intervention.

The deployment process of the banking core is a complex and includes:

- 600 weekly deployments (8% to Production)
- Java web, libraries and SOA components
- Database deployment (Oracle)
- Server selection according to component type, environment and geography
- Hotfix deployment exceptions
- Parsing SQL files for fixing UTF-8 and validating naming conventions
- Managing temp files and server logs and cache at deployment time
- Different server restart sequences depending on geography
- Calendaring, with concurrency controls for job slots at each environment

CONCLUSION

The success of Clarive at this organization is based on its **ability to orchestrate many tools (a total of 14!) and stakeholders at a global level, deploying complex banking core changes in many environments in different countries.**



Moving forward, the customer is implementing more technologies and complete project governance orchestration, with resource allocation, project planning, tracking and resourcing. The intention forward, and a major ROI will be replacing aging mainframe tools.

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ABOUT CLARIVE

Clarive Software provides a DevOps lifecycle management platform for the evolving enterprise across every platform and environment. Founded in 2010, the company is headquartered in Spain and today has offices in the Brazil, UK, and Belgium. Its senior management team has close to 25 years of practical experience in ALM, release and deployment management. Clarive has been named as Gartner COOL Vendor DevOps 2015 and its product gets great recognition from analysts within OVUM, Gartner, and Forrester as well as within its rapidly growing customer community. For more information, Please visit www.clarive.com.

ABOUT COLLABNET

CollabNet is a global software and services company that allows leading enterprises and government organizations to deliver high-quality software at speed. With our platform and services our customers develop and deploy cutting edge applications by empowering their teams to scale enterprise-wide agility and DevOps across their software development lifecycle. With CollabNet, teams can work together to envision, build and deliver great software with confidence. Visit www.collab.net.

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