



Major Swiss Bank

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The Situation

One of the largest banks in Switzerland adopted the Application Lifecycle Management solution of one single major software provider. But during usage the project teams learned that this solution was not the right answer for their needs and caused many pains.

The bank decided to reorganize the process and opted for implementation of an integrated tool chain based on different best-of-breed tools of several vendors. For the requirements management discipline, they have been looking for a solution capable of integrating with their Change Management, Task Management, UML modeling and Test Management tools and able to answer to the demands of their requirements engineers. The new tool for requirements management had to:

- Support the conceptual separation of project and product lifecycles
- Allow the creation of common specifications to satisfy identical requests in different projects
- Improve collaboration between project team members
- Allow an overview of the overall developed product without having to check the history of every single project over the complete product lifecycle
- Keep specifications consistent with current product behavior
- Support the defined process and guarantee consistency over the whole project lifecycle
- Provide the ability to rollback to any point in the past to review and understand system status at that time

The Selection

Polarion participated in an extensive evaluation process including tool solutions from **15 different tool vendors**.

This process consisted of a Request for Information (RFI), a showcase including 25 Use Cases, and a Request for Proposal (RFP) in which about 2,000 questions had to be answered. The tool evaluation involved a broad community of engineers throughout the bank.

After passing a Proof of Concept (PoC) focused on the tool integration to show data exchange and synchronization between the different tools, **Polarion was chosen by the engineering community as the “best-of-breed”** tool for Requirements Management to complement the tool chain.

In the following pilot phase, more than 300 users participated in the production roll-out of the Requirements Management solution. In the final stage of the implementation, about **1,500 users** are planned to work with Polarion REQUIREMENTS.

The Solution and its Benefits

Integration: The open and modern architecture of Polarion REQUIREMENTS is best integrated with the bank IT infrastructure and gives the chance to connect to other tools used by the client through APIs and a common integration framework. In the bank’s tool-chain it perfectly integrates requirements management with UML-models managed in Sparx Enterprise Architect, and the selected

15

different tool vendors have been beaten in an extensive evaluation process



Environment

350 users
1,500 users in final phase



System Specs

On-Site, 1 Server



Products

Polarion REQUIREMENTS



Conclusion

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Lead Requirements Engineer

change management and test management solutions. Subversion was selected as Version Control System for further documentation and source code.

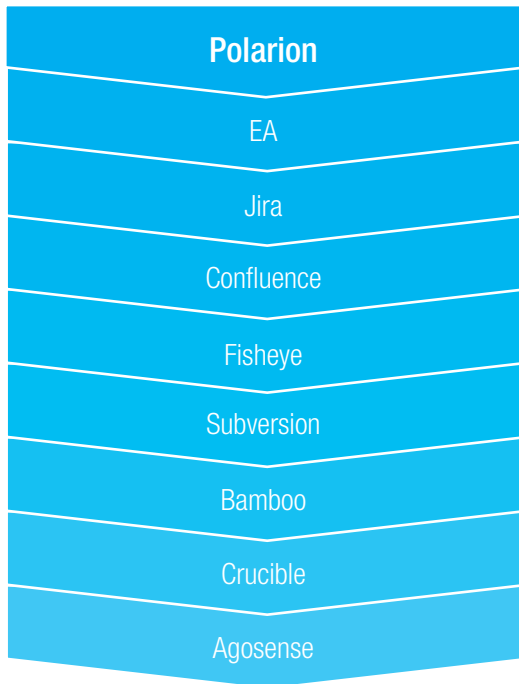
Flexibility: The Polarion REQUIREMENTS tool is flexible in order to support different project lifecycle processes such as Waterfall, RUP or Agile. At the same time workspaces for products with a different configuration for the product lifecycle can be established and work items between project and product workspaces can be linked together.

Collaboration: The solution improved the collaboration between the departments of the big organization. It supports the platform idea and allows for different views on the various aspects of the system in a project and product view.

Traceability: Polarion REQUIREMENTS enables users to link requirements to change requests, source code and diagrams. This way it is possible to have an overview and transparency of all requirements.

Consistency of Information: The solution gives users the ability to very easily link product requirements with project requirement artifacts and therefore gain better control of change impact. Redundant work caused by duplicate or similar project requirements that impact the overall product are being prevented effectively. All users know the who, what, when, and why of all actual status of the product and project in respect to its requirements and impacting changes.

Implemented Tool Chain



Security: Polarion REQUIREMENTS guarantees the compliance with the strict Basel II standard for banks. Polarion was integrated in a standardized Single-Sign-On solution of the bank.

Ease of use and deployment: The solution is easy to use for all users in different roles like marketing, requirement engineers, and allowing engineers to work in a document-like style as they used to do in the past; or work model-focused with Polarion for publishing and review purpose. It was configured, customized and rolled out by the bank's own tool integration team after only four days of training provided by one Polarion consultant. It is web based and easy to back up.

The Client: Major Swiss Bank

The Major Swiss Bank has been a successful financial services provider for more than 150 years in the sectors Private Banking, Investment Banking and Asset Management. The Bank has more than 400 sites globally and around **48,000 employees**. For the Private Banking sector the company built up a software factory tool chain, setting a development environment for more than 2,000 developers in three international locations.



About Polarion

Polarion Software's success is best described by the hundreds of Global 1000 companies and over 1 Million users who rely daily on Polarion's Requirements Management, Quality Assurance, and Application Lifecycle Management solutions. Polarion is a thriving international company with offices across Europe and North America, and a wide ecosystem of partners worldwide. For more information, visit www.polarion.com.

Provides
all the transparency and
traceability needed

Easy
exchange
of data
speeds up
collaboration and
approvals

Ease of use
and deployment