ARCAD Critical Data Management facilitates integration of banking activities for Palatine Bank ■■■

ARCAD-Datachanger automates and secures SAB parameter data and facilitates business process integration during an acquisition.

BANQUE PALATINE

Palatine Bank

CUSTOMER SUCCESS STORY

Palatine Bank, a business and wealth management bank, has a national network of over 60 agencies and nearly 9,000 clients from small and medium enterprises and regulated real estate professions. In addition, it serves 124,000 individual clients. Founded in 1780, the bank has expanded through successive purchases and acquisitions, and it is now part of the Caisse d'Épargne Group.

During its integration into the Caisse d'Épargne Group, Palatine Bank purchased the SAB banking software package, whose functional coverage encompasses all banking and financial transactions. At the same time, Palatine Bank adopted the ARCAD Software suite, in particular ARCAD-Deliver and ARCAD-Observer, for software configuration management, automation of transfers to test and production, and deployment.

ARCAD-Skipper has been installed since 2005 and ensures software configuration management for the various SAB modules. However, the need to manage SAB parameter data became evident. The parameter data ensures the correct functioning of the software within the bank's own financial practices and constraints. Palatine Bank initially developed a tool to manage parameters, but maintaining this tool became costly and time-consuming. Therefore, the bank opted to use ARCAD Software's Critical Data Management (DCM) solution.

In the first quarter of 2008, the need to integrate a recently acquired bank, Crédit Foncier de France (CFF) into Palatine's banking system impacted the initial strategy for the DCM rollout. The scope of the project grew as the bank sought to integrate more than 24,000 individual clients and 3,000 businesses that rely on CFF. Deadlines became increasingly stringent in order to guarantee that optimal performance was achieved in time for the IT conversion scheduled for late November. ■

> " *It is clear that the integration of CFF would have been difficult without a tool of this type. ARCAD-Datachanger gave us security,"*

Bruno Parriaud,
Environments Manager

■ A totally successful project, completed on schedule

After an audit of the internally developed tool and the SAB files, the setup of ARCAD-Datachanger began in April 2008. The implementation was completed in August, followed by the effective integration of CFF parameters into DCM. The new SAB parameter set represented a large volume of data. At Palatine Bank alone, this meant the definition of 1,804 DCM data type components based on 440 parameter files. The setup of DCM led Palatine's Environment Management Team (EMT) to get into legacy SAB parameters in detail. The team obtained the information it needed by interviewing SAB. In addition, ARCAD Software consultants made recommendations regarding specifics of SAB parameters. Since SAB files are split into tables with different formats, and certain fields are compressed, they can be difficult to handle.

DCM extracts the virtual format, captures the current parameter set, and takes all factors into account, thanks to its easy-to-use menus. Once these steps were completed, ARCAD-Datachanger interfaced correctly with SAB. During August 2008, CFF parameter data that was previously validated in the testing environment was retrieved and set up in DCM. It can now be directly accessed through SAB menus. This process took a considerable amount of time, but the investment has already paid off. In early November 2008, once tests were complete, the EMT team easily carried out controlled promotions to production. Once the parameter data was added to the ARCAD repository, distribution of more than 25,000 CFF parameter modifications/additions to production took only half an hour. It took longer for the project team to validate this transfer to production than it took for the technical deployment itself. Integrity checks validated the quality of the data installed. Put to the test in this high-volume situation, ARCAD-Datachanger met the demands with highly satisfactory results.

■ A noticeable improvement in testing and operations

In day-to-day practice, users – whether they are working in IT or solely on the business banking side – access parameters through normal SAB menus. Modifications they make in the user update environment are automatically saved by ARCAD-Datachanger behind the scenes. These updates can then be transferred to the test environment automatically by ARCAD. The Environment Management Team systematically reviews any new parameter data changes using ARCAD-Datachanger. Before DCM was set up, updating the test environment was complicated and subject to parameter data losses and human error. Thus, each environment update took several days and involved many manual steps. DCM has greatly enhanced and automated this process.

"Refreshing the test environment has become a simple operation," says Sophie Gablier, a member of the EMT team. Today, updating the test environment takes less than one day. It includes all of the parameters, except the accounting processes, which are already handled by a specific SAB tool.

■ A positive overall result and a sound foundation for future projects

"It is clear that the integration of CFF would have been difficult without a tool of this type. ARCAD-Datachanger gave us security," says Bruno Parriaud, Environments Manager.

ARCAD-Datachanger setup was the challenge of the year for the EMT at Palatine Bank. The volume of data processed was significant. Previously, numerous configuration parameter versions existed together: 70 installed versions represented over 40,000 lines of code. A flat-fee arrangement was made with ARCAD Software for DCM setup.

A consultant remained full time for the first month, then provided technical advice on an occasional basis. Later, Palatine Bank would occasionally request telephone assistance via the ARCAD hotline.

Spurred on by the imperatives of the CFF integration, this project made it possible to update the bank's entire software configuration parameterization system. Moreover, it is now easier to integrate new versions of SAB into their system. New parameters are now immediately incorporated into the DCM database. The previous in-house parameter management tool is no longer operational, but it is still used as a reference for file history until ARCAD-Datachanger has captured enough history for it to be removed. The Palatine Bank will soon migrate to a new version of SAB. Since it will include some format changes, it will be necessary to study its impact on operational applications prior to any future modifications. The ARCAD tools will provide significant assistance with this task.

Furthermore, the team has also encountered an issue with the sheer size of SAB software data files taking up substantial memory, making it necessary to increase disk space on the testing server. However, use of the ARCAD-Extract database extraction module would permit a considerable decrease in the volume of data processed. ■