



## Effective management in times of crisis

### IZB uses leading task management system

When the Internet site of a savings bank is suddenly no longer available or one of its services no longer functions smoothly, the operator of the site, the IZB Informatik-Zentrum München – Frankfurt a. M. GmbH & Co. KG, declares a state of crisis. In a very short space of time, it must be established whether the cause was a technical fault in the system or the result of an attack by a hacker. A team of specialists is called together to find and solve the problem as fast as possible. A crisis of this type calls for highly effective management: all involved must know at all times what the next step is.

Stephan Hoster is relieved. As the manager of the IZB Informatik-Zentrum Service Center he had a clear goal: to introduce a management system that significantly reduces the administrative effort involved in a crisis and frees up time for the actual task: coping with the crisis. He decided in favor of tick@, the project and task management system from a-tune software ag. Looking back, tick@ proved to be the perfect solution.

There's something rather satisfying about being able to do your banking without worrying about the opening hours of your local bank. The Internet has made this possible. But what provides the customer with increased comfort and flexibility poses a challenge for the bank. Doing business over the Internet necessitates an extremely high standard of security. The customer wants to be sure that a remittance reaches the right person and that no one has unauthorized access to his data. An increasingly profound knowledge of technologies, standards and systems is required to guarantee this level of security. The data center must be kept running 24 hours a day, 365 days a year, since neither the Internet nor the notorious hackers take a break. The enormous amount of effort involved prompts many banks to turn over the running of their data centers to professional service providers such as the IZB.

The IZB, one of the leading companies in this sector, provides its customers – mostly savings banks – with a complete range of data processing services. From consultancy to operation and even care and maintenance of the IT systems, all these services are available without interruption.

The demands on these services have changed considerably over the last twenty years. In the past banking could only be done at the local branch, "remote data transmission" was carried out using tapes. Today most banks use the Internet to offer their service portfolio to customers via portals. Customers have the possibility to carry out a wide range of business transactions comfortably from within their own homes, at any time and around the clock. But that in itself involves completely new risks. While the banks' data processing centers used to be cut off from the outside world, today they are connected with the entire world via the Internet. Hypersensitive security systems ensure that the customer can rely on the smooth and secure processing of his banking transactions. His data are safe. But what happens when the Internet site of a bank is momentarily not available, or bank transfers cannot be carried out over the Internet in the usual way? Possibly the bank's customer is annoyed, he blames his "slow" computer. What he doesn't know is that the security systems at IZB have already raised the alarm and a "state of crisis" has been initiated to solve and discover the reason for the problem as quickly as possible.

Information about system faults reaches an employee in the First Level Support first. When a printer doesn't work or an ATM won't dispense money, this is a typical service case which a single employee can deal with until the problem is solved. „However, if we discover while dealing with the fault that we have a serious problem here, a “state of crisis” is declared and the specialists are called in. Then we work like the emergency services do. The first person on the spot is the boss, until the professionals arrive“, says Stephan Hoster about the initiation of the state of crisis. „We need a tool that rapidly informs all involved in coping with the crisis about what needs to be done, that quickly furnishes the person responsible for managing the crisis with an overview of the situation, and that at the same time supports legal requirements regarding the documentation“. After careful scrutiny, the decision was made in August 2004 in favor of tick@, the project and task management system from a-tune software ag.

#### **tick@ - state-of-the-art technology for effective crisis management**

tick@ project and task management is a system for the processing of work assignments that is successfully established on the market. It is based on state-of-the-art Microsoft technologies with an easy to use web interface. Stephan Hoster was convinced even after the first presentation: „tick@ is just what we need to effectively manage crises. It offers the exact functionality required to reduce the administrative overhead“.

The core element in tick@ is the “task”. When a task is created, it is defined what needs to be done, who is involved and who is responsible for completing the task. tick@ provides all employees with a clear view of the tasks they are involved in. This ensures that all team members can quickly see what work they have to do when. This guarantees that they concentrate on what is most important.

The task provides all relevant information that employees need to successfully complete the task. This includes planning figures, priority, colleagues involved. Additional information can be recorded directly in the task details or made available in the form of documents attached to the task. Each employee working on the task records his activities together with his estimation of the percent completed. Thus during the processing of the task, a clear overview of the individual steps taken develops, with the result that the status is visible at all times.

#### **Solution partners**

##### **IZB**

The IZB Informatik-Zentrum belongs to the Sparkassen-Finanzgruppe (Savings Bank Finance Group). It was founded in 1994 by the Bayerischen Landesbank (Bavarian State Bank) and the Bavarian savings banks and has since then established itself as one of the leading suppliers of sophisticated information and communication technologies. Its customers benefit from the IZB's expertise and full service offerings: from system development through system management to round-the-clock care and maintenance. Since January the Landesbank Hessen-Thüringen (State Bank of the states of Hesse and Thuringia) has a share in IZB, which took over the entire range of IT operations at the Landesbank Hessen-Thüringen. The IZB offers services in the areas of client-server, mainframe and networks – from consultancy through setup and operation to care and maintenance of IT systems. Increasingly customers outside the saving bank sector are benefiting from the wide range of services offered by IZB. The company has around 600 employees in Munich, Nuremberg and Frankfurt. Its excellent positioning enables the IZB to continue to profit more than average from the expected market growth and to remain a forerunner in its field, providing customer-oriented IT services – in areas such as outsourcing and security requirements.

##### **a-tune software ag**

a-tune software ag was formed in 1986 as a limited liability company (GmbH) and became a public company (AG) in 2002. a-tune is one hundred percent self-financed and as such is a reliable partner with a solid business model. The product tick@ project and task management was developed out of years of experience with complex, multifaceted projects. In accordance with the company philosophy „make IT simple“, the focus lies on easy setup, use and maintenance. Our wide customer base includes companies such as Deutsche Telekom, Alte Leipziger, Aventis or Tyco Electronics AMP, among others, who have decided in favor of tick@ project and task management and cooperation with a-tune software ag.

### Successfully coping with crises

The procedures that are activated when a crisis arises are clearly defined. The central aim is to restore the service affected. The second aim is to discover the cause. Was it a coincidence or was the system actually attacked from outside? While the first objective is quickly achieved, finding the cause can take longer than a day. It is important to find out what triggered the crisis so that the necessary steps can be taken to prevent the same thing happening again. A crisis manager is appointed who leads the team, ensures that the documentation required by law is complete and is responsible for timely communication with the customer. From the IZB's point of view, it's a measure of success when the bank can be informed that a problem has been solved even before the bank's employees realize that there was a problem. And it is exactly here that tick@ is used in support of effective crisis management.

### Informing teams quickly and comprehensively

In a data center such as that of the IZB, which offers its services around the clock, the employees work shifts. Every 8 hours there is a shift change and then it is important to quickly provide the new team with a comprehensive overview of the tasks still to be done and the work already carried out. The aim is a smooth transfer of work and responsibility between shifts. Thorough and complete documentation of the work steps and intermediate results forms a solid basis for this task. tick@ makes this process considerably easier.

With tick@, the shift supervisor has a comprehensive overview of all work to be done during his shift. For each task, one single person is responsible, and the appropriate employees are assigned. tick@ informs all team members immediately about the steps to be taken. During the shift, each employee documents the results of his work in a simple and timely manner, until the task is 100% complete. Once a task is completed, tick@ presents the tasks to the shift supervisor for his acceptance. He can quickly and easily find out about what has been done and, by accepting the task, can confirm that the task has been successfully completed. The work done can be seen at any time, even after the fact. That guarantees a smooth transfer from one shift to the next.

### Fulfilling the documentation requirements of § 25

Companies like the IZB who provide services to banks are subject to paragraph 25a of the Kreditwesengesetz (German Banking Act) the so-called „Outsourcing Paragraph“. This paragraph clearly lays down the obligation of a company that has taken over the running of a bank's data center to provide documentation to the bank. The accuracy of banking transactions or financial services must be guaranteed. Outsourcing may under no circumstances compromise the ability of the bank's management or the Bundesanstalt für das Kreditwesen (Federal Banking Advisory Office) to monitor and control the bank's business. tick@ ensures that every work step is transparently documented. The processing of a task is documented directly in tick@ by the employees working on the task. Thus individual activities can be traced at any time and can be laid before the customer or a supervisory board for inspection at any time. This ensures that simple and quick access to all relevant information is possible, in accordance with §25a of the German Banking Act.

### Providing timely status reports to customers

In addition to status reports for the customer, which are required as part of the crisis management program, regular meetings are held between the IZB and its customers. At these meetings, the current status of operation of the system is coordinated and new customer change requests are recorded. In preparation for these meetings, all documents that describe the status of the systems must be collated and processed. tick@ considerably reduces the effort required for this preparation. Relevant documents are attached to tick@ tasks and are therefore available at all times without redundancy. The customer is quickly provided with a comprehensive overview of the current status.

### Software and systems

tick@ project and task management is used at the IZB in the following environment:

- Microsoft Office XP
- Microsoft SQL Server 2000 with Microsoft Reporting Services
- Microsoft Windows 2000 Server with Internet Information Server

## Summary

The smooth running of a bank's data center is one of the core tasks of the IZB Informatik-Zentrum München - Frankfurt a. M. GmbH & Co. KG. When this activity is threatened by a disruption in service that escalates to a crisis, the cooperation of a specialized team led by a crisis manager is called for. This task involves administrative overheads required to deal with the organizational handling of the crisis, together with demanding legal requirements regarding the complete documentation of events. With a-tune software ag's tick@ project and task management the IZB has a tool in place that supports this process. The effort required for leading the team is considerably reduced, completion of the legally required documentation is supported, communication between the teams is simplified, quick and comprehensive reporting to the customer is ensured. tick@ project and task management at IZB forms the technological basis for effective crisis management.

### Contact person (customer):

#### The solution was implemented at:

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