

BOI FreeDa Staging

Audit-proof Workflows for Controldata

Summary



Customer profile (2023)

- Baloise in Switzerland is part of the Baloise Group, which offers comprehensive insurance and financial solutions.
- Headquarters: Basel, CH
- Founded: 1863
- Employees: ~4,000 (incl. Liechtenstein, Asset Management and Bank)
- Balance sheet total Baloise Switzerland: CHF: 4,025.7 million (46.7%) (as at FY 2023)
- Website: www.baloise.com

? Challenges

- The existing staging processes for deploying the control data into the productive environment were decoupled from data maintenance, complex, not audit-proof and therefore prone to errors.
- This led to high communication workload, personnel bottlenecks and it slowed down the entire process considerably.

➤ Goals

- Replacement of the existing staging processes with a standardized and audit-proof process for maintaining and staging control data.
- Coordinated cooperation between operating departments and IT departments throughout the entire process.
- Secure and uninterrupted transition to BOI FreeDa.

💡 Solution

- Simple, standardized and audit-proof workflows for audit-proof maintenance and staging of control data.
- The Process Stepper makes the entire staging process intuitive and fast.
- Configurable roles and authorizations ensure that only authorized persons can change and/or transfer control data.

+ Benefits

- Comprehensive workflows for both data maintenance and staging.
- Audit-proof through complete logging
- Error prevention and ensuring data consistency.
- Saving IT resources by outsourcing maintenance to operating departments and Docker-based installation process.



„By deploying as a Docker image, BOI FreeDa can be installed and upgraded easily and quickly.“

Christian Frei, Product Owner at Baloise



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Challenges

Obstacles in the existing processes

For insurance companies like Baloise Insurance AG, accurate data maintenance is crucial, as inconsistencies can have costly consequences. Baloise manages numerous control data in over 250 database tables, which must be regularly updated, checked and transferred together with the associated software applications between environments through to production. These processes are referred to as staging processes.

The maintenance and staging of the data were decoupled from each other, meaning that there were no consistent workflows. The processes also required manual actions by IT, which were time-critical in order to provide the right control data to the right environment. If a crash occurred during the transfer, manual checks were required. The resulting waiting period, additional resources and manual steps not only increased the risk of data inconsistencies, but also the workload in IT.

Decoupling the maintenance and staging processes slowed down the entire process of data maintenance and transfer for the productive use of control data.

The previous staging processes were no longer able to meet these security and efficiency requirements.

The key goals

Introduction of a solution that combines the maintenance and staging processes, standardizes them and offers a high level of security and userfriendliness:

1. Accelerate the entire process of securely processing and transferring data changes between multiple environments in clear, standardized, and audit-proof workflows.
2. Audit-proof data maintenance by employees without database knowledge and transfer actions by IT. All data changes and transfer actions must be traceable at all times.
3. Easy changeover from the previous processes to the new solution during ongoing operations.
4. Last but not least: relieving the IT department and the operating departments.

Goals



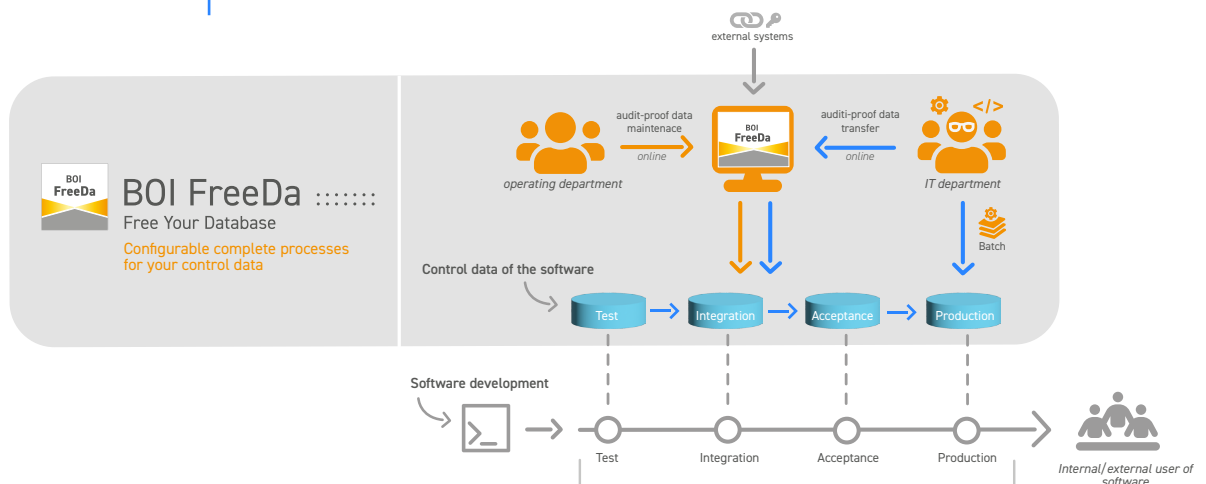
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Solution

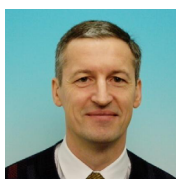
BOI FreeDa fulfills these goals

BOI FreeDa and the add-on BOI FreeDa Staging offer standardized workflows for processing and transferring critical data. These are shown schematically in the following figure.



The staging process in BOI FreeDa Staging is designed to transfer tables safely and efficiently from one environment to the next. The maintenance and transfer processes that can be used are defined for each environment. A targeted roles and permissions system ensures that only authorized persons can view, edit, check and release tables. Every change is logged precisely and can be traced if necessary. This ensures seamless logging that meets the requirements of audit security.

A central component of BOI FreeDa is the process stepper. It is used to edit the tables according to the defined workflows and transfer them from one stage to the next. This enables intuitive editing and the transfer of changed control data to production within a few minutes.



„BOI FreeDa is extremely user-friendly and takes a lot of work out of our IT team - the staging process is simple, fast and absolutely secure.“

Ulrich Rauer, Business Engineer at Baloise



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Benefits

Easy maintenance and secure transfer of critical data

The implementation of BOI FreeDa with Staging has significantly improved the workflow at Baloise.

Thanks to the high usability of BOI FreeDa, the operating departments can independently process all data, including critical control data, thus relieving the IT department. The fast and secure staging process saves the company time and resources. Error-prone manual checks are a thing of the past. In addition to time savings, data quality has improved. Previously time-consuming and complex processes have been replaced by efficient procedures with clearly structured rules.

The docker-based deployment of BOI FreeDa has also significantly reduced installation and maintenance costs, resulting in long-term cost savings.

By using BOI FreeDa, Baloise was able to achieve all its goals.

The successful and close cooperation with BOI has shown that BOI FreeDa can be implemented easily and efficiently and that all individual requirements can be taken into account. BOI FreeDa is therefore the ideal solution to fully meet Baloise's high requirements for audit-proof maintenance of critical data and its transfer from the development to the production environment.



„The cooperation with BOI Software GmbH has been excellent! Our questions are always answered quickly and competently. Our contacts at BOI spare no effort for our concerns.“

Michael Mühlebach, Product Owner at Baloise

