Integration Case Study: Managing IT Demand Through Integration to Remedy Help Desk

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Agenda

- About Xinify Technologies
- Transparency Crisis
- 360 degree view
- IT Governance
  - Work Management Systems
  - Project Portfolio Management
- Business Operations Integration
- NIKU Integration Challenges
- NIKU Interface Technologies
  - Web Services & the Niku XML Open Gateway
  - Custom Interfaces
- Xinify Interface Engine
  - Rules, Transformation, Validation
- Reuse and Scalability
  - Xinify Engine upward compatibility with XML Open Gateway
- Case Study - Top Hollywood Studio
- Questions
About Xinify Technologies

• **Solutions**
  - IT Governance Solutions
  - Business Intelligence Solutions
    • 360 Degree view across enterprise applications
    • Business Performance Management
    • Business Process re-engineering
  - Business Optimization Strategy
    • Continuous Monitoring and Enhancement
      - Real-time Monitoring, Analysis, Alerts, Optimization

• **Services**
  - IT Tools
  - Solutions
  - Professional Services
Transparency Crisis

• “Enterprise Applications”
  - Promise comprehensive support
  - But only address limited functional scope
    • e.g., human relations, CRM, ERP, etc.
  - Yielding even larger “islands of automation”
  - Making transparency across the Enterprise IMPOSSIBLE!
“Enterprise Applications”
- Have very rich internal information models
- Provide sophisticated interfacing engines
- Fail to integrate easily due to proprietary information schemas
Demands for Transparency can only be met with a “360 degree” view of the Enterprise

“Enterprise Intelligence” interrelates incongruent information models

- yielding Enterprise Transparency
The "360 degree view" provided by Xinify's Business Intelligence Solutions helps clients to
- improve the performance of their systems
- developing stronger relationships with customers, partners, suppliers, and employees
IT Governance

• Project Portfolio Management
  - Plan  Resources & schedule across the Enterprise
  - Track Include assets, resources and finances
  - Evaluate Understand variance from plan
  - Optimize Leverage variance from plan

• Work Management Systems
  - Identify  Integrate with incident management systems
  - Establish Management processes to accomplish
  - Integrate Incident, Planning, Tracking and Financial
  - Optimize 360 Degree View to better reprioritize
Business Operations Integration

• **IT Governance Requirements**
  - Establish and act in accordance with a justified “business plan” *not simply react*
  - Provide “activity based management”
    - Identify and track each action financially
    - Update resource expenditure plans
    - Evaluate and optimize based on variances
  - Provide support for “Capital Investment Review Committee” oversight of IT
    - Documented business cases to justify investment
    - Update of investment plan to reflect realities
    - Maintenance of “Board Level” roadmap
  - Provide for rapid response to changing requirements
  - Ensure robustness through contingency planning
Niku Integration Challenges

- 360 Degree View across all application data models
- Synchronization of Business Process Flows with inter-application transaction flows
- Compatible integration technologies
NIKU Interface Technologies

- **Web Services**
  - Niku XML Open Gateway
  - Direct application-to-application discovery and communication
  - Published directory of services
  - Built-in facilities to evolve

- **Custom Interfaces**
  - Accommodate service requirements not in current “Web Services” portfolio
  - Interface to applications without Web Services support
  - Augment functionality
    - Enhanced user interfaces
    - Enterprise Reporting Architecture
Custom Interfaces

• Web Services: **PMO Manager**
  - EXCEL-based tool for mass project & resource change

• Database Synchronization: **ACCESS**
  - Integrate custom project status Forms to database

• Custom Interfaces: **EXCEL Templates**
  - Project & Resource data upload
  - Forecast & Actual data upload
  - XML-based custom utility to monitor project financial actual and forecast values
Xinify Interface Engine

• **Transformation**
  - Translate between differing application concepts
    • Differing data formats
    • “One-to-Many” and “Many-to-Many” mappings
  - Synchronization robustness and recoverability

• **Rules**
  - Implement Business Process Decisions & Workflows
  - Specified at the “Business Level”
  - Directly accessible by the Business Analyst

• **Validation**
  - Use “rules” to ensure approved business processes are enforced
  - Identify and report variances to management attention
Reuse and Scalability

• Xinify Engine
  - Reusable “component”
  - Implements Transformations, Rules and Validations
  - Upward compatibility with XML Open Gateway
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The Challenge

• Managed response to IT Service Requests
  - **Classify** Service Requests received in REMEDY by the “IT Business Process” needed to respond (small vs. large new project, system repair, etc.)
  - **Differentiate** Service Requests requiring management approval from reports of completed actions
  - **Create** new Tasks, Projects or Programs in NIKU based upon approved templates for each “class” of Service Request

• Enterprise Resource and Financial Accountability
  - Coordinate Resources, Budgets and Expenditures between NIKU Financials and SAP Financials/Human Resources
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The Challenge

- **Gather Information from existing systems...**
  - **REMEDY**
    - Help Desk - *incidents ... assigned to services within groups*
    - Asset Management - *costs of non-labor resources/services*
    - Performance Monitoring - *utilization by service within group*
    - Change Management - *schedules, commitments*
  - **SAP**
    - Human Resources - *skills, rates*
    - Financial - *budgets, rates*
- **Update operating management systems...**
  - Help Desk - *resolution status*
  - Financial Management - *posting of services within groups*

360 Degree View of the Service Portfolio
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- **Requirement**
  - “See” and “control” all expenditures
  - *From simple maintenance to major Initiatives*

- **Integrates**
  - **Remedy** Helpdesk, Asset & Performance Management software to keep track of Service requests, resources and service levels
  - **Niku 6** Project Portfolio Management (PPM) System to plan, schedule, collaborate & report on projects
  - **SAP** to manage resources, budgets, accounting & reporting
  - **PeopleSoft** to provide Human Resources & OBS information

**WORK IS MANAGED IN THE APPROPRIATE SYSTEM**
• Implement “Workflow Management System”
  - Automate creation, routing and tracking of processes needed to respond to and report response to work requested
• Track all levels of “activity”
  - Provide “Activity Based Management”
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“Cost to Serve” Workflow

Complex
- Strategic Initiatives
- New Applications
- Application Enhancements
- Application Repair
- Infrastructure Realignment
- User accommodations
- Workstation Upgrades/Repair

Simple

Status
- Incident Management (Help Desk) REMEDY™
- Workflow Assignment Rules Engine Xinify Tech.
- Enterprise Reporting Engine ACTUATE™

NIKU
- Programs
- Projects
- Tasks
- Budget Allocation Labor Resource
- ERP SAP/R3™

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Rapid & Flexible Implementation
With reusable components

Diagram:
- PeopleSoft HR Data
- REMEDY: Help Desk, Change Management, Asset Management, Time Sheets
- Staging Tables/XML Extract
- XINIFY INTERFACE: Engines - Rules, Validate, Transform, Scheduler via TIDAL, Manual Trigger
- MS EXCEL
- SAP
- NIKU Application Database
- Run Report/Error Log File Archive

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• Benefits
  - **Client Billing System**
    • Accurate “actual costs”
    • Covers all MIS labor, assets & purchase costs
    • Replaces former “budget-based” Client Billing system
  - **Activity Based Management**
    • Cost breakdown by Work Categories within MIS
    • Costs charged to Business Units based on actuals
    • Critical for managing the business
  - **Operational Reporting Information**
    • Visibility by system
    • “Detailed” actual costs of labor
    • Costs tracked at the “ticket” level
    • Visibility of all organizations charging to a ticket
NIKU-REMEDY Adaptor

• Integration of CLARITY with REMEDY

  - STRATEGIC DIRECTION
    • NIKU Product Offering
    • Integration of NIKU’s Incident Management Module with REMEDY
    • Fully upgradeable to NIKU 7.5

  - REMEDY Modules
    • Help Desk
    • Change Management
    • Asset Management
Questions?

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