Service™
Flow

Finally!

An Easy Way to Manage Service Integrations

Introduction

Hi there, welcome to this instructional guide for IT pros who are trying to get all their internal and supplier service management tools talking to each other and sharing data.

Fully integrated software and services sounds great in theory, but what does it look like in real life? We know IT has been tussling for decades to get this stuff right, so what's changed?

At Service-Flow we meet IT teams all the time who are fiddling around with DIY batch files, scripts and scheduled tasks, in order somehow to automate the otherwise manual process of getting data out of one system and into another.

Let's be honest, not much has changed in this space for a long time. These 'magic scripts' and spreadsheets of data exports all look very similar to how they did 10 years ago, however now there are just a lot more of them! Inevitably this also means that every day more of them fail and more IT pros get bigger and bigger headaches.

So here's the good news...

This is now officially the old way of doing things. It's been around for some time and everybody has had their fair share of integration pain; and now it's over!

But before we get stuck into **how** you can quickly and easily adopt the new approach to effortless service integration, here is our good friend Dave with a short story about the old way and the new way...

DAVE

Dave explains integrated services

"I have a service desk tool, which my team and I use to generate tickets every day. We probably log about 100 support calls a day, but only about 20 of those of are things we can fix ourselves. The other 80 go off to third parties who either just take over the whole ticket from us till resolution, or we act as a middle-man, going back and forth between our customer and the supplier. Either way, a majority of tickets end up as multiple support calls across different suppliers and we need visibility of them all."

Doing it the old way

"For some of the suppliers, we have to email them to report issues. They then send us a weekly report of ticket updates, which I go through and use to update our own ticket logs. This is silly because it means we never really have up-to-date data, but it is the least disruptive way of getting a full view of everything.

For other suppliers, we have to separate out the incident reports from the bugs and change requests and log them in spreadsheets. At the end of each day, one of the people in my team uses a script he wrote to convert this data into a file, which then gets uploaded into our supplier's service management tool. We then get sent the ticket data by email to confirm the requests have been raised. The supplier does the same thing the next day and our tickets get updated. This goes wrong A LOT and we spend hours a month trouble shooting the scripts.

Another way we used is a lot more old fashioned, we just call them up to report an issue. They give us a ticket number... and we wait."

Continues on the next page

DAVE

Dave explains integrated services

Doing it the new way

“So that is how it used to be. Now we have a single integrated approach to working with all our sup-pliers.

We have real-time connections from our service desk tool into the ticketing tools of our suppliers. At just the click of a button we can escalate a ticket using our own software and language so that all the data important to co-operation with our suppliers, e.g. customer, call log, categorization and service level, is automatically added to a new ticket in the suppliers software. Better yet, when that supplier updates the ticket those updates appear in our own ticket logs too (and vice versa). In reality there are of course multiple tickets open across several platforms. However, as far as the support staff are concerned, everyone is working off one ticket.

We can also update configuration and policy data across systems. So if we want to change a service level agreement with a supplier, when we amend that in our own system the same change can be configured to the integration logic in one place. The corresponding data is then updated automatically on our supplier system too.

Best of all, tickets falling between the gaps between us and our suppliers is a problem of the past. Our current new integrations have 99.9% up time and end-to-end availability and 24/7 monitoring.

All these factors gives us back the time we need to focus on the really valuable stuff like customer experience and continual service improvement, which I guess is every IT departments’ dream.”

How does it work? (it’s simpler than you think)

Before we start setting up new integrations, let’s take a look at some of the common language you’ll see across Service-Flow. You will see these terms appear a lot in this guide, so it’s good to know what they mean.

Messages

Service-Flow is built on our unique messaging system. Essentially the message is a packet of data. Every ticket, alert, notification or change that is raised in either your own or your vendor’s systems is stored and communicated within a message. And because all messages are managed by virtual brokers, messages never get lost. Even if the receiving software is offline, messages will be queued till it’s back up and running.

Brokers

Brokers are lightweight applications within Service-Flow that route messages. Brokers know all your rules and configuration settings, so when a message arrives with a service ticket inside, the broker knows exactly which of your multiple suppliers that ticket needs to go to. The same applies when ticket data is sent back from a supplier, the broker will find the original ticket data in your own system and update everything automatically.

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How does it work? (it's simpler than you think)

Rules

Every integration you setup requires a set of rules to ensure that all tickets are routed to the right place. In addition to routing data, rules contain information around SLAs, event thresholds and ticket categorisation. This means that you can easily report on real-time ticket data from your supplier's systems, and have all the automated notifications that you would normally have setup in your own tools.

Adapters

Adapters are the final piece of the puzzle. Adapters are basically data ninjas that take whatever coding, data and configuration is inside your messages and translates into the exact information the system at the other end needs. Adapters sit on both your side and your suppliers side of the broker, not only translating data into system specific languages, but into the single language used by the Service-Flow broker.

Good to know!

Everything you use in Service-Flow is managed through the simple-to-use interface, so most of the stuff here just goes on behind the scenes. But it is all useful to know right!

How to setup an integration

Integrations consist of two layers, the process layer and the technology layer. The process layer defines how integrations work and most processes are defined by specific use cases and scenarios.

The technology layer of the integration is Service-Flow's 'secret sauce'. This layer is the Software-as-a-Service (SaaS) function that automates the mapping between your systems and your suppliers. It handles how rules are aligned, how messages are sent and received and how the different software languages are translated and understood. Any changes you want to make to your technology layer are all managed in the process layer interface.

To setup a new integration you first need to establish the source system, then choose one of the pre-existing adapters in Service-Flow for the supplier system (For example ServiceNow or LANDESK). You can select all of this through the simple Service-Flow user interface on your adapter.

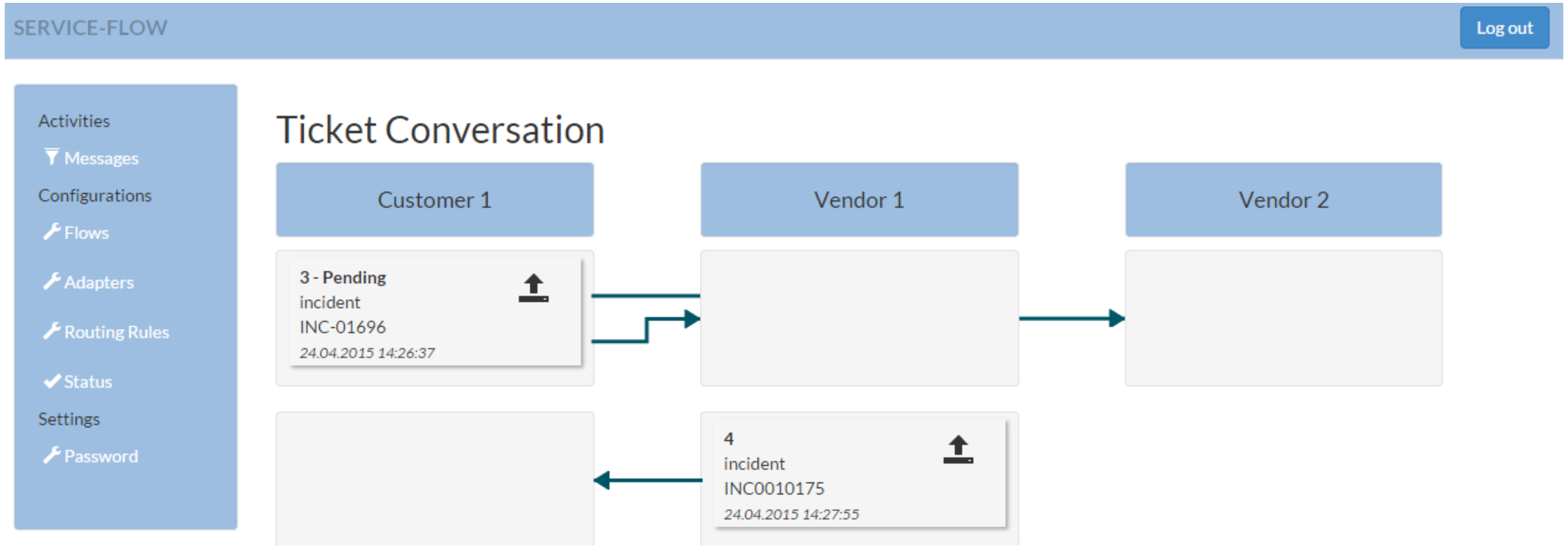
Once you select the different end points of the integration, you can use the Service-Flow interface to configure the relevant business rules and mappings to build your 'ticket conversation'. This conversa-tion is essentially a visualised version of how your messages pass from one system to another. This is particularly useful for when tickets have to travel through two or more vendors' systems after they leave your own.

Once you have built your conversation or 'flow', you can go into each stage of the ticket's journey and create the different rules you might need; such as when to qualify a ticket as high priority, decide which specific technician should be assigned to a ticket or what open/closed status the ticket should be awarded.

See an example on the next page

How to setup an integration

Here is an example of what a conversation interface looks like in Service-Flow:



Ticket Conversation

Customer 1	Vendor 1	Vendor 2
3 - Pending incident INC-01696 *24.04.2015 14:26:37*		
	4 incident INC0010175 *24.04.2015 14:27:55*	

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How to setup an integration

Why is this cool?

We think setting up integrations like this is pretty ground breaking. Traditionally this is done mostly through a manual process by developing from scratch to match different API's and data models, or writing bespoke and fragile scripts to map data import/exports between two systems. So not only does Service-Flow speed up the whole process, it also wraps it all up in a simple code-less user interface.

How do you explain this to your boss?

Most of the time, managers don't want to hear about how much code you do or do not have to write, they just want to hear you talk about the time and money involved. With regard to setting up new integrations, you can explain that you have developed a more efficient way to leverage the value you get from a supplier by automating ticket exchange and saving a lot work time (and therefore money).

This provides greater transparency and control and enhances SLA reporting from both your own pro-cess and your suppliers. This is important because although you can outsource a service, you still retain the accountability for the value it creates for your business. The visibility of managed services and their metrics, gained through automating your integrations, brings these valuable benefits.

How to change an integration

WARNING! *This step is super easy!*

A big challenge with heavily scripted, manual and documented integrated processes is that when you want to amend something like an SLA, categorisation or technician assignment rule, you could be creating days or weeks of work for yourself.

In Service-Flow all the elements that connect the rules between your systems and your suppliers are automated. It doesn't matter if you use different terms or spellings for an 'incident' or a 'service re-quest' - Service-Flow creates a single language inside the adapter - so you never again have to spend hours hunting for the field you need.

So how do you actually do it?

To change an integration, you simply login to Service-Flow and search for that integration. You will quickly find a set of rules that are relevant to that integration. Then just select the 'edit' button and you will be shown all the attributes within the rule to be changed. This includes which systems you can map messages to (you can have multiple mappings coming out of a single message), plus all the category and status options. All of the settings are managed in one language within Service-Flow and changes are replicated to the relevant systems automatically, so you only have to make your changes in one single system.

DAVE

How to change an integration

"What if I need to disconnect an integration temporarily?"

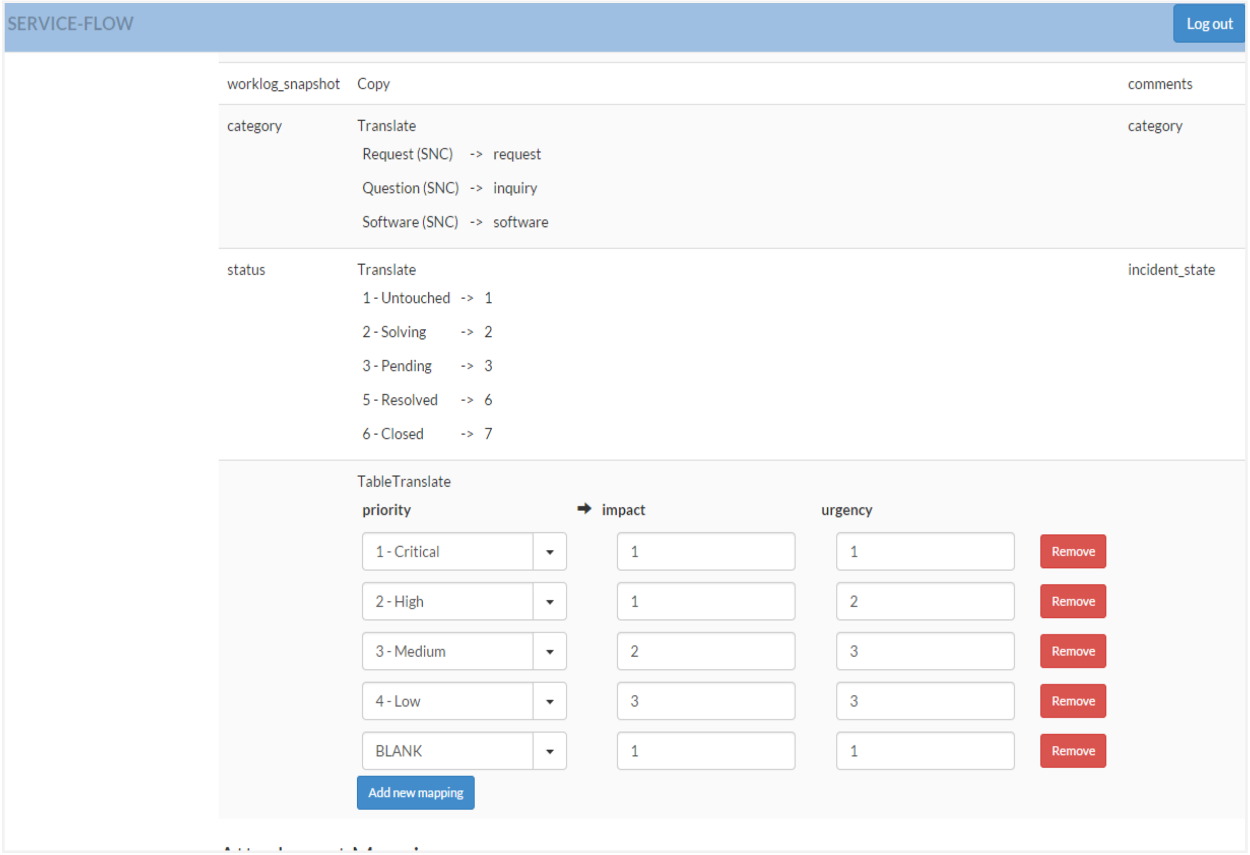
Good question Dave! Sometimes when you are making complex changes, or switching mappings from one system to the next, you will want to take everything off-line for a while. Traditionally the danger here is that downtime means any attempted communications made during that time get lost.

Service-Flow's solution to this is that if the Broker isn't able to route a message it will simply queue it. When the adapter it is waiting for comes back online, it will check what the new routing rule is and send all the queued messages through the new mapping.

See an example on the next page

How to change an integration

Here is an example of an integration edit page. As you can see, it is pretty simple to use.



worklog_snapshot Copy comments

category Translate category

Request (SNC) -> request

Question (SNC) -> inquiry

Software (SNC) -> software

status Translate incident_state

1 - Untouched -> 1

2 - Solving -> 2

3 - Pending -> 3

5 - Resolved -> 6

6 - Closed -> 7

TableTranslate

priority	➜ impact	urgency	
1 - Critical	1	1	Remove
2 - High	1	2	Remove
3 - Medium	2	3	Remove
4 - Low	3	3	Remove
BLANK	1	1	Remove

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How to change an integration

Why is this cool?

This is cool for a couple of reasons. Firstly it saves you bundles of time because you don't need to search through several systems that you may or may not know a lot about to find the various fields of data and their machine names for mapping. Secondly this is cool because anyone in your team can do it.

Normally, integrations - whether they be simple or complex - require more than one person to set them up as you need people with specific system knowledge. With Service-Flow, anyone can amend an integration without having to be an expert in the system they're integrating.

How do you explain this to your boss?

Focus on the people power required to get good work done. You want your boss to feel that you have thought about how the changes you want to make affect the team as a whole.

By explaining that you have developed a method of speeding up changes by reducing the amount of people power each change requires, they will then be able to gain a clearer view of how faster changes can make both your team and your service better for the business.

Using SaaS for service integrations

More and more companies are choosing Software and a Service (SaaS) solutions to solve their IT and ITSM challenges as SaaS tends to provide all the same features and benefits of traditional on premise solutions but with added flexibility and significantly lower costs.

Until recently there has been little to nothing available for IT teams who wanted to use a SaaS solution for multivendor integrations, particularly for companies pursuing a Service Integration and Management (SIAM) framework. This big gap in enabling simpler, faster and cheaper integrations is what actually motivated us to develop Service-Flow. So let's take a look at some game changers using SaaS for service integration.

It's a subscription

Software and infrastructure are like new cars, as soon as you buy them they start to lose value. So why buy when you can rent? We also know from experience that when purchasing new software the cost is never the cost. There will always be more to pay for such as implementation, configuration, maintenance, licensing, renewables and so on.

In addition to the software costs, you also need to consider hosting and infrastructure. Do you need to purchase new servers to host your software on? If so, perhaps you need to pay your staff over-time to build and deploy that server outside of core business hours. If you have existing servers in place for your new software, what research and preparation must you do to ensure they are fit for purpose? What changes are required in order to get those servers ready for the installation, what financial and staff resources will that require and how will you carry out testing?

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Using SaaS for service integrations

….the short response to this is that buying software is expensive and no matter how many times you have done it, there will always be something you didn't expect to pay for.

When subscription software is done well it removes large upfront costs and provides predictable and controllable spend. You can even create more flexibility around shifting your subscriptions across Capex and Opex spending.

SaaS equals speed and agility

Even a standard change within your own IT environment can come with major fallout. Small changes within complex ecosystems can create wide spread and significant issues. SaaS enables you to relinquish your ownership of the platforms that house your software and thus the responsibilities and risks that come with ensuring that platform is robust enough to support any change you need to make.

This not only means that you can reduce the risk from each change you make, but you can now make more changes, which is the key to enabling DevOps and continuous development working styles.

A more agile approach to change also means more scalability, which is something your business will love to hear. Businesses do not often appreciate being told by IT that their project will take an extra 8 weeks because IT needs to setup the new software, test out new hardware increase storage capacity.

SaaS allows you to change that conversation and turn IT into an accelerator for business projects.

Let’s get your tools talking today!

We come back to it time and time again. Great productivity comes down to one thing; communication. But in the enterprise IT environment, it isn’t just about having a better working relationship with the guy sitting next to you, it is about the quality of communication between your teams, suppliers and tools.

You achieve this by building more seamless and agile connections between these different functions.

How to do it

To develop a strategy for how to do this, we need to look back at the four fundamentals of Service-Flow, which we described at the beginning of this guide and understand what your current maturity is in each area:

Messages: The quality and format of information sent across different systems.

Brokers: The decision making process behind how a request will be assigned, categorized and communicated back to the customer

Rules: The core guidance that advises the decision making process and informs your service level agreements

Adapters: The speed and efficiency of translating information across systems and suppliers

Let’s get your tools talking today!

Service-Flow can help!

At Service-Flow we help assess dozens of companies every day on their current approach to each of these functions. Some of them are performing well in all areas, but just need the tools to automate the manual work. Others are just out of balance; over-managing in one area as a way to counter their challenges in another.

We can help you ascertain where your service integration gaps really are and develop a quick and easy plan to execute, bringing all your tools and suppliers together in no time at all.

Once you have identified your most valuable areas of improvement, Service-Flow can provide you with the adapters you need to setup real-time connections between your tools and suppliers, plus a simple interface to manage any changes or additional connections.

Service-Flow also holds strong relationships with some of the most successful and reputable Service Integration and Management (SIAM) providers globally. This means, that Service-Flow can access the help you need at every level of your service integration journey.

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Let’s get your tools talking today!

Introducing the Service-Flow Experience Team

Service-Flow Experience team is responsible for providing technical support for Service-Flow partners and end-users. You can contact the team anytime you need help building, changing or managing an integration. Service-Flow has a commitment to simple, which means as soon as something starts looking like a challenge, our Experience Team are ready to help you get back to the easy life!

The Experience Team is made up of Service-Flow integration experts who have long experience of developing and delivering service integrations. Experience Team is operating integrations on your behalf and are responsible for technical support and maintenance of all critical components like infrastructure, applications and the actual integrations

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About this eBook

This eBook was written by the team that run Service-Flow, a SaaS based solution for service integration.

We wrote this guide for you because we regularly work with IT teams to help them simplify their Service Integrations and we want to share our knowledge and secrets to success with you.

The advice in this guide is based on our most important learnings while carrying out our work. All the information used in the guide is based on real life successes and challenges we have faced as a business.

If you would like to learn more about our company and the software we make, please get in touch today. We love to talk about IT!

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