

Peregrine

Integration



Implementing AssetCenter for existing ServiceCenter clients

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Connect-It

Peregrine Systems, Inc.
3611 Valley Centre Drive San Diego, CA 92130
858.481.5000
Fax 858.481.1751
www.peregrine.com



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Consolidated Service Desk and Lifecycle Asset Management

Introduction

The late 1990's was a "go-go" period for IT and Operations managers. The intense pressures of bringing successful solutions to market (at any cost) on a timely basis, amidst increasing competition, difficulty in retaining high quality staff, and increasing systems complexity, was difficult at best.

The events of the past six months have only slightly changed the operating environment for today's managers. The Internet, **and the changes it has and will continue to make in the business world**, is here to stay. Organizations are still "go-go", but now coupled with the mantra, "less-less". Most of the same issues remain from the "dotcom" era.

Time to market is no less a concern today as a year ago, however, there is additional pressure due to budget constraints. On the competitive front, while many eCommerce companies in highly competitive segments have disappeared, the majority of all businesses continue to operate in highly competitive markets.

Probably co-related in some way to the above, continued M&A and other reorganizational activities increase the stress on the IT and Operations teams (what systems stay or go, what staff gets cut, consolidate various other systems/processes).

Infrastructure complexity is still increasing and the number of systems in today's organization may continue to proliferate as CEOs decide to integrate additional legacy or older systems rather than investing in new ones.

System complexity is not limited to "physical" infrastructure. The last decade saw the rise of the networked organization. Partners, customers, employees, suppliers, and other stakeholders are more tightly incorporated into the day-to-day business processes. This complexity creates friction.

All the issues above, as well as countless others, require **proactive management** to get it right, and get it right the first time. This is where the integration of a lifecycle asset management solution with a consolidated service desk (CSD) minimizes project risk and saves money by ensuring that the appropriate **people, processes and infrastructure**, are set to enable success. The tight integration of a dedicated IT asset management repository with a CSD enables the IT manager to understand today's complex enterprise infrastructure and take appropriate action.

The integration between ServiceCenter and AssetCenter gives the customer a valuable "head start" on the road to an integrated CSD with lifecycle asset management and a wider infrastructure management solution as a whole.

Evolution of the CSD and Lifecycle Asset Management

The CSD market has evolved over the past few years from its roots in primitive call tracking systems. While call-tracking systems served their purpose, it soon became apparent that something more than a "siloes" approach was required. The main issue with these systems is that they were "reactive" in nature, they did nothing to prevent problems. In addition, different tools were used across distributed organizations. This resulted in a hodgepodge of disjointed processes that were often not repeatable for solving similar problems across the enterprise.

The first CSD tools aimed to consolidate and automate these processes across the extended enterprise. These tools were also increasingly integrated with network and desktop management tools to give the IT manager a better view into their infrastructure and its increasing complexity. With this complexity, IT managers also looked to become more proactive and to better manage the change process and its importance on the infrastructure.

The release of the Information Technology Infrastructure Library (ITIL) as well as other codified best practices looked to provide a framework of process around the IT support desk. The major processes are broadly defined as the following:

- Incident management -- traditionally the call-tracking process as noted above.
- Problem management -- the processes for problem and error handling as well as establishment of proactive problem management capabilities.
- Configuration management -- collection of basic inventory data and its relationship to other elements of the infrastructure.
- Change management -- the planning and execution of infrastructure changes.
- Release management -- codification of the process around software release and distribution.

While the above disciplines coupled with a high quality CSD tool are a vast improvement over the past, they still lack the ability to truly "optimize" the investment in an organization's infrastructure. It is only when a CSD solution is coupled with a lifecycle asset management program that an enterprise can extract the maximum value from their infrastructure portfolio.

Most CSD solutions today lack asset management. In fact most solutions do not go any further than basic asset tracking -- what is the asset, where is it and who "owns" it. Configuration management goes a step farther via more extensive relationship data -- not only what and where and who, but who and what else. Configuration management tracks the relationship between assets for more precise change planning and faster problem resolution.

Lifecycle asset management includes the capabilities of a configuration management solution but extends that solution by adding comprehensive financial capabilities, procurement, contract and catalog management as well as extensive lease management capabilities.

The coupling of the service support capabilities of a CSD with total lifecycle asset management provides the framework to control and maximize the value of your organization's infrastructure portfolio.

ServiceCenter and AssetCenter

The integration between ServiceCenter and AssetCenter represents a first step towards an integrated infrastructure management solution. It reflects a "best practices" integration by leveraging the investment an organization has already made in ServiceCenter and creating out-of-the-box data and processes integration into AssetCenter.

The integration requires Connect-It 3.0.1 and is available for ServiceCenter versions 4.0 and AssetCenter 4.1 and later. The provided Connect-It scenarios (for data and process mappings) are packaged with both Connect-It and AssetCenter 4.1. You are encouraged to request assistance from Peregrine

Professional Services to ensure a successful implementation, particularly if you have made extensive customizations to your current ServiceCenter implementation.

Leveraging your investment in ServiceCenter

Peregrine recognizes the significant investment organizations made in setting up the processes to support a ServiceCenter implementation. Thus Peregrine efforts were focused on leveraging those investments to make the initial data population to AssetCenter as seamless as possible. Major areas included:

- **Categories**: scenarios were created to populate AssetCenter tables with the Categories you are already accustomed to in ServiceCenter. This reduces training time and streamlines the friction points between the solutions.
- **Location, People, Department**: as most ServiceCenter customers have processes currently in place to maintain accurate base data within ServiceCenter, several scenarios were developed to take into account the differences in the way the applications handle and populate these items. The ServiceCenter customers will continue to use their current processes for updating this data in ServiceCenter with the appropriate updates passed to AssetCenter on a periodic basis.
- **Asset data**: to extend the asset information you currently have in ServiceCenter, several scenarios were created to populate the associated tables within AssetCenter.

Business Process Automation

As previously stated, the integration of a service desk with a lifecycle asset management solution is critical in today's complex IT environment. Thus the second major focus of the integration is the automatic creation of an AssetCenter Request from a ServiceCenter Request. Special care was taken to implement a best practice case where only specified ServiceCenter requests create AssetCenter purchase requests.

We have included two different business processes with this integration.

The first scenario enables integration between ServiceCenter requests and AssetCenter purchase requests.

As an example, assume a support analyst working on a ServiceCenter Request realizes a new hard drive is required. The support analyst will then create a request which will create a purchase request in AssetCenter.

The second scenario enables integration between ServiceCenter expense lines and AssetCenter expense lines.

Financial Automation

Obviously one of the strengths of a lifecycle asset management solution like AssetCenter is the depth of the financial capabilities. Some changes were made to add costing capabilities to Service Management. We utilize expense lines functionality in ServiceCenter and create an expense line in AssetCenter to track the time and cost associated with a ticket.

As an example an helpdesk analyst is working on a ticket for one hour; the helpdesk has a billrate of \$100 an hour. This scenario will handle creating a \$100 expense line in AssetCenter associated with the asset the helpdesk analyst worked on.

The Future

Integration scenarios will continue to be enhanced in future releases. The current out of the box scenarios are meant as a best practice guideline to get your organization started on the road to integrated infrastructure management.



Business process integration

Document Introduction

This document focuses on specific points of integration between ServiceCenter and AssetCenter.

There are two primary aspects to this integration.

- 1 The data replication between the two systems, people, assets, cost centers, request templates, etc.
- 2 The ability to bring the processes of Service Management together with the processes of Asset Management.

 **Warning:**

The best practices mentioned in this guide only deal with implementing AssetCenter when ServiceCenter is already being used. They do not deal with the case of implementing both applications at the same time.

Assumptions

This documentation is designed with the understanding that the prospective clients of this product will have knowledge of Connect-It, AssetCenter and ServiceCenter.

The prospective clients of this product will have an existing ServiceCenter 4.0 installed.

Peregrine Systems strongly recommends to be helped by the Professional Services.

Technical reference

- Help Desk Service Management records are referenced as "SC SM Tickets"
- ServiceCenter Request Management records are referenced as "SC Requests"
- ServiceCenter Expense Lines records are referenced as "SC Expenses"
- AssetCenter Purchase Requests are referenced as "AC Requests"
- AssetCenter Expense Lines are references as "AC Expenses"

About data integration

This integration is designed for an existing ServiceCenter implementation to which Peregrine AssetCenter is being added. Some existing data in ServiceCenter must be replicated in the AssetCenter database to assure synchronization and interoperability. Connect-It scenarios have been created to perform the initial propagation of data. After they have been configured to suit your environment, scheduling should be enabled to maintain replication.

Requirements

Software	Version
ServiceCenter	4.0
AssetCenter	4.1
Connect-It	3.0.1 and greater

 Note:

For detailed information on supported Operating Systems and DBMSs, check the Peregrine Systems support web site at the following address: <http://support.peregrine.com>. This web site contains the latest compatibility information, supported by the products and versions listed in the above table.

Preintegration Set Up

Preintegration Set Up - ServiceCenter

- Please make sure that the following files are present on your system:
 - **ConnectIt\config\shared\strings\accups.str**
 - **ConnectIt\config\shared\mpt\ISOCountry.mpt**
- Please import into your ServiceCenter the following files located in the **patches/sc** folder:
 - **expline.unl**
 - **expline2.unl**
 - **scac request.unl**
 - **ac2sc request.unl**
- After these imports, the following character fields must be added manually to your ServiceCenter Dbdicts:
 - dbdict: ocmo
 - ac.request.status
 - ac.request.id
 - dbdict: ocml
 - ac.request.line.status
 - ac.request.line.no

- dbdict: expline
 - asset
 - ac.status
- Then, the following fields must be added manually to your ServiceCenter forms:
 - ocmo.view.summary.g
 - ac.request.status
 - ac.request.id
 - ocml.view.default.g
 - ac.request.line.status
 - ac.request.line.no

Scenario and connector configuration

Each scenario will need to be configured prior to being run. Open each scenario in the `\scenario\acscups\dataprop` sub-folder of the Connect-It installation folder, and perform the following steps for each connector.

Configuration of the ServiceCenter connectors:

- 1 Right click the ServiceCenter connector and then select **Configure connector**.
- 2 Select **Next**.
- 3 Enter your **Server name**, **Login** and **Password** for ServiceCenter.
- 4 Click **Next** until you reach the **Configure Cache** wizard screen.
- 5 Make sure the **Use cache file** option is not checked, then finish your configuration.

Configuration of the Asset Management connectors:

- 1 Right click the Asset Management connector and then select **Configure connector**.
- 2 Select **Next** then select the appropriate AssetCenter connection, **Login**, and **Password**.
- 3 Finish the configuration of the connector.

Configuration of the XML File connectors:

- 1 Right click the XML connector and then select **Configure connector**.
- 2 Make sure the name of the folder to which the connector will write is valid.
- 3 Make sure the DTD is pointing to the appropriate location.

 Note:

After configuring your connectors, save your scenario and continue to the next one.

Error Handling

All scenarios have been created with error handling abilities. This is a crucial area of your implementation. Without error handling, you will not know if a transaction between the two systems fail. Because no two implementations are exactly alike, you should watch this area carefully until you are confident that your implementation is working well.

Errors occurring during the execution of scenarios are stored in XML files located in the **error** folder of the Connect-It installation from which you ran your scenario.

Errors occurring during the execution of the business process scenarios send notifications of the error occurrence.

Example 1. Error Example

You may encounter problems while propagating the department names from ServiceCenter to AssetCenter.

When you run this scenario, you will find an .xml file in the error folder of the Connect-It folder. It is as equally as important to monitor your Connect-It document log.



1 Initial Propagation of data to AssetCenter

CHAPTER

Open the following scenarios and run them once each by clicking **Produce now**. After running each scenario, review the Connect-It log for any errors that may have occurred.

Here is a list of the Connect-It scenarios that are provided that you need to run in the following order:

- 1 SCcompany2ACamCompany.scn
This scenario enables integration between ServiceCenter company data and the AssetCenter Company table.
- 2 SClocation2ACamLocation.scn
This scenario enables integration between ServiceCenter location data and the AssetCenter Location table.

 Note:

After running this scenario, you will have to check the **sub-location** field data for all locations in AssetCenter. If the link between locations and sub-locations is broken, you will have to create it manually.

-
- 3 SCdept2ACamEmplDept.scn
This scenario enables integration between ServiceCenter department data and the AssetCenter Departments and Employees table.
 - 4 SCcontacts2ACamEmplDept.scn

This scenario enables integration between ServiceCenter contacts data and the AssetCenter Departments and Employees table.

5 SCdevtype2ACamNature.scn

This scenario enables integration between ServiceCenter device types data and the AssetCenter Nature table.

6 SCocmlcat2ACamNature.scn

This scenario enables integration between ServiceCenter categories data and the AssetCenter Nature table.

7 SCmodel2ACamModel.scn

This scenario enables integration between ServiceCenter model data and the AssetCenter Model table.

8 SCdevtype2ACamModel.scn

This scenario enables integration between ServiceCenter device type data and the AssetCenter Model table.

9 SCdevice2AACamPortfolioAndamComputer.scn

This scenario enables integration between ServiceCenter device data and the AssetCenter Portfolio and Computer tables.

10 SClaptop2ACamPortfolioAndamComputer.scn

This scenario enables integration between ServiceCenter laptop data and the AssetCenter Portfolio and Computer tables.

11 SCworkstation2ACamPortfolioAndamComputer.scn

This scenario enables integration between ServiceCenter workstation data and the AssetCenter Portfolio and Computer tables.

12 SCpc2ACamAndamComputer.scn

This scenario enables integration between ServiceCenter pc data and the AssetCenter Computer table.

13 SCserver2ACamAndamComputer.scn

This scenario enables integration between ServiceCenter server data and the AssetCenter Computer table.

14 SCphone2ACamPortfolioAndamPhone.scn

This scenario enables integration between ServiceCenter server data and the AssetCenter Phone table.

 **Warning:**

The best practices mentioned in this guide only deal with implementing AssetCenter when ServiceCenter is already being used. They do not deal with the case of implementing both applications at the same time.



2 Business Processes: Cost Tracking

CHAPTER

It is important to track cost associated with assets. This information can be used to help make appropriate decisions regarding the asset. In situations where a charge back system or billing system is used, the creation of cost records are necessary to track the cost of providing service and to charge the cost to the appropriate business unit.

AssetCenter has the ability to have expense lines that can be used to represent time spent on a helpdesk ticket. Time spent on work done using AssetCenter is tracked within the application. To track time spent and costs occurred for tickets worked in ServiceCenter, workflow must be created to propagate the cost from ServiceCenter to AssetCenter. This section details the method used to accumulate costs in ServiceCenter and then pass them to AssetCenter.

Time Spent and Associated Cost

When a ServiceCenter Help Desk ticket is worked on, an AssetCenter Expense line should be created to track the amount of time spent on the ticket and the associated cost.

Populate the different fields (Date, Technician, Hours Worked) and make sure that the technician has an associated cost per hour.

The screenshot displays the ServiceCenter application window titled "ServiceCenter - [Examining Incident Number IM10001]". The interface includes a menu bar (File, Edit, View, Format, Options, List Options, Window, Help) and a toolbar with various icons. Below the toolbar, there are navigation buttons: OK, Cancel, Previous, Next, Save, Undo, Close, Find, Fill, and Clocks.

The main data area shows the following incident details:

ID	Open Time	Update Time	Alert Status	Category	Title
IM10001	05/30/02 06:51	05/31/02 05:41	updated	other	taylor ticket

Below this, the incident title is "IM10001" and the ticket status is "Open". The incident title field contains "taylor ticket".

The interface also features a tabbed menu with options: Incident Details, Activities, Contact, Asset, Attachment, SLA, Parts & Labor, History, Alerts, and Related P... The "Parts & Labor" tab is active, showing two tables.

The first table, under the "Parts & Labor" tab, has the following structure:

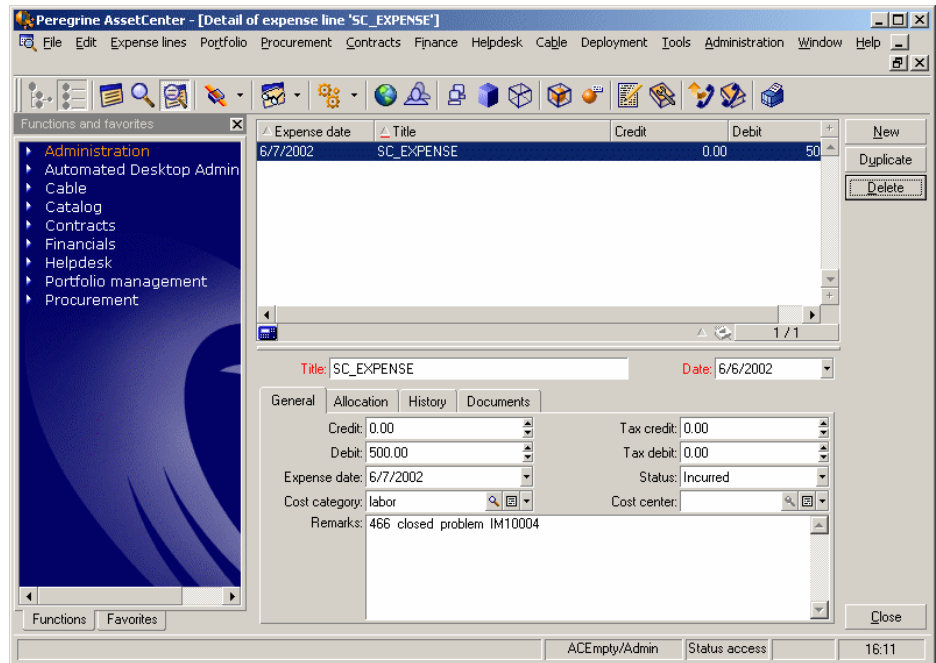
Date	Part Number	Quantity Used

The second table, also under the "Parts & Labor" tab, has the following structure:

Date	Technician	Hours Worked
05/31/02 00:00:00	falcon	3

At the bottom of the window, a status bar indicates "Selected line is row 1 of 32 records retrieved" and includes an "insert" button and a file path "problem.template.update.g [S]".

The AssetCenter expense line contains the cost associated to the technician and the reference of the ticket worked on.



Real world example

Each time a support person works on a ticket, the amount of time spent and the associated cost needs to be tracked in AssetCenter. A ticket may be worked on by various assignees. It may also be worked on by the same assignee in multiple separate blocks of time.

Implementation Solution

When support persons work on a ticket, they need to log the time they spent on it. A trigger, which was inserted when you loaded the **scac request.un1**, inserts a record in the expline table. This record contains the asset that was worked on and an amount. The Connect-it scenario then takes the record from expline and creates an expense line entry in the amExpLine table in AssetCenter.



Note:

Fields 'asset' and 'ac.status' should have been added in the expline dbdict during the preintegration setup steps.

The scenario **SCexpl ine2ACamExpLine . scn** handles all interactions between the two applications for expense lines.

Implementation testing

- 1 Select **Incident Management** in ServiceCenter.
- 2 Select **Open a new Incident**.
- 3 Go to the **Incident Details** tab and populate the fields as follows:
 - **Category:** client systems
 - **Subcategory:** hardware
 - **Problem Type:** test
 - **Problem Type:** test
 - **Severity:** 3 - Normal
 - **Site Category:** C Satellite Site
 - **Description:** this is a test
- 4 Go to the **Contact** tab and populate the field as follows:
 - ◆ **Reported By:** BROWN
- 5 Click the **Fill** button.
- 6 Click the **New** button.
 - 1 A pop-up message asks you if you want to associate this with another open ticket, select **New**
 - 2 A pop-up message asks you to select a problem type: select **bypass**
 - 3 A pop-up message asks you to select a product type: select **bypass**
- 7 Go to the **Incident Details** tab and populate the fields as follow :
 - **Manufacturer:** Compaq
 - **Class:** test
- 8 Select **Save** and note the incident number
- 9 Assign the incident to a group: PEREGRINE
You now have an open ticket.
- 10 Select **Search IM Tickets**, and find your ticket
- 11 Update this following information on the Incident

- **Parts & Labor** tab
 - Date: 06/06/2002
 - Technician: FALCON
 - Hours Worked: 10
 - **Activities** tab, **Action/ Resolution** tab
 - Type: Analysis/research
 - Corrective Actions: Tested the machine several times.
- 12 Click the **Save** button
 - 13 A pop-up message asks you to select a product type: select **bypass**
 - 14 Open the **SCexpLine2ACamExpenseLine.scn** that you previously configured during the preintegration steps.
 - 15 Select the ServiceCenter connector and click **Produce now**.
 - 16 Switch to AssetCenter and check that an expense line has been created.



3 Business Processes: Integrated procurement

CHAPTER

The ability to link a ServiceCenter Request and an AssetCenter Request and to keep them synchronized is another fundamental aspect of this integration. This section details the points of contact between the two systems.

ServiceCenter Request Creating or Updating an AssetCenter Request

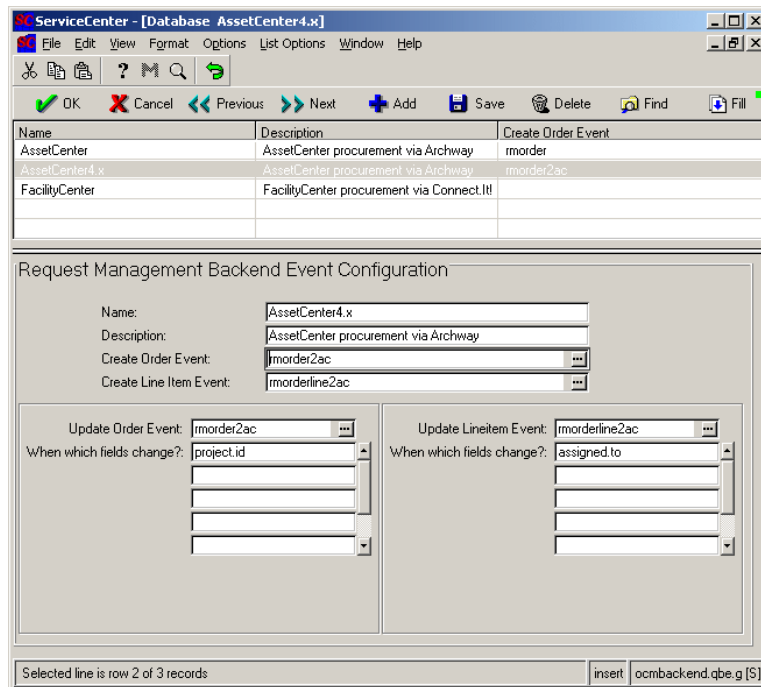
Real World Example

A user contacts the service desk requesting a color printer. A request is opened in ServiceCenter Request Management. After the appropriate approvals have been made in ServiceCenter, a request is then opened in AssetCenter to acquire the printer.

Once the printer has been acquired, the AssetCenter user updates the purchase request, which then updates the request in ServiceCenter.

Implementation Solution

As part of a request, there are multiple line items to be completed. In ServiceCenter, these lines are linked as child items of the request. If the ServiceCenter Request is transferred to AssetCenter, the request lines need to be transferred as well. This is determined by the model vendor record for the item being purchased. In the model vendor record, there is a field called **Back End System**. If the **Back End System** field is set to AC 4.x, then the request will be sent to AssetCenter.



To have procurement integration at the request level, make sure the **AssetCenter4.x** record in the **ocmbackend** dbdict has the **Create Order Event** field set to **rmorder2ac** and the **Create Line Item** field set to **rmorderline2ac**. This will enable the ServiceCenter Request to go along the request line item.

 Note:

Fields 'ac.request.status' and 'ac.request.id' should have been added to the ocmo dbdict; and ac.request.line.status and ac.request.line.no should be added ocml dbdict during the preintegration setup steps.

The scenario **SCocm2ACamRequest.scn** handles all interactions between the two applications for request.

Implementation testing

As a requisite to this test, it is presupposed you have imported the **scac request.un1** into ServiceCenter and created the following form in ServiceCenter: **ocmo.view.summary.g** and **ocml.view.default**.

- 1 Open up the database manager and pull up the form **ocmbackend.g**.
- 2 Select the record **AssetCenter 4.x** and make sure that those two fields create an Order Event and an Item Event.
- 3 Set up at least one model vendor record so that it uses "AssetCenter4.x" as the back end.

From the **home** menu, choose Request Management. From the **Maintenance** tab, choose Supporting Files.

From the **Catalog** tab of the **supporting files** menu, choose Model Vendors. Choose a part such as the Toshiba laptops 241, and 242.

Add **AssetCenter4.x** to the **Ordering Backend** field.

- 4 Make sure that the ocm background process is running.
This is accomplished by clicking the **command** button. Enter **Status** in the **Command** field. You should see the ocm scheduler running every 60 seconds.
- 5 Check the repeat interval on the **OCM Create Order** schedule record.
This is accomplished by opening the **schedule** table in the **database manager**. Set it to a time period shorter than once a day for testing.
- 6 Create the quote request for the Toshiba laptop item and then submit it.
- 7 Go to the **Approval** tab, and then click the **Financial Approval** button.
- 8 Under Currently Pending Approvals select the PROCUREMENT approval group
- 9 Go to the **Options/ Override/ Approve all** menu.

An order record is created.

When the order is created, it should now create the event out record.

- 10 Go to the **Utilities** tab **Event Services** then to the **Queues** tab and select Output queue
- 11 If you don't get the event out record, make sure that the order and order line item are actually created. You can check from the quote.
- 12 Once you have a document in the event out queue then you are ready to test the Connect-It scenario.
Run your scenario and validate that the purchase request was created in AssetCenter and that the AssetCenter request id and status were updated in ServiceCenter.

