

Business Application with no code – using OOTB SharePoint

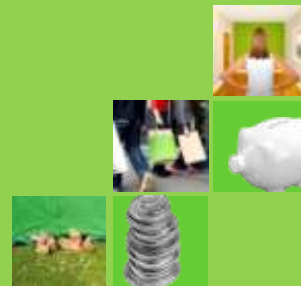
NZ Community SharePoint Conference 2009

Tony Kennedy - Kiwibank

Philip Town - Kiwibank

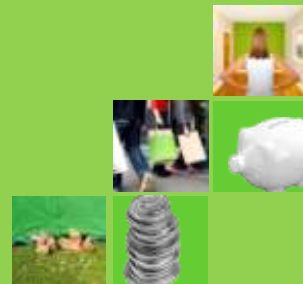
Chandima Kulathilake – KnowledgeCue

www.knowledgecue.com



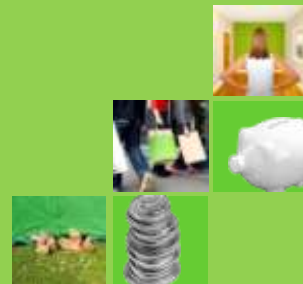
Introductions

- Tony Kennedy – The “boss”
- Philip Town – The “IT guy” with the problem
- Chandima – I just happened to be there....



Agenda

- Challenges facing production IT
- Options
- Solution
- Snapshot of KB Sysview
- Future Enhancements



Challenges Facing Production IT

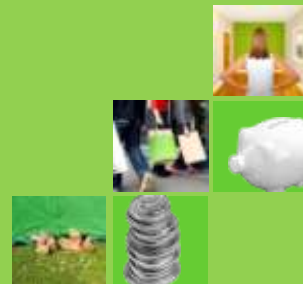
■ Challenges included:

- Rapid growth of company and systems
- Lack of cohesive view of all inter-related systems and processes
 - A breakage in one system had a ripple effect across multiple systems
- Increasingly difficult to manage incidents
 - Incident Managers had lack of visibility of systems and their potential failure impact to the business
- Lack of knowledge sharing between staff
 - Difficulty locating information necessary to support systems and processes
 - Developers frequently failed to transfer knowledge to those that supported the systems
- Plus many more challenges that often confront companies that grow rapidly!



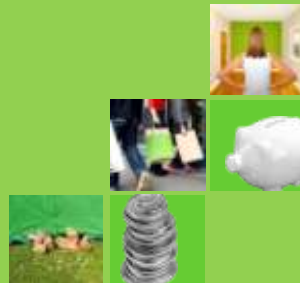
Our main issue – related to systems

- We needed to know first hand how our systems were inter-related
- To know who the Subject matter experts were
- The information was known only by certain staff at Kiwibank
- The systems related information needed to be shared



We used Excel!!

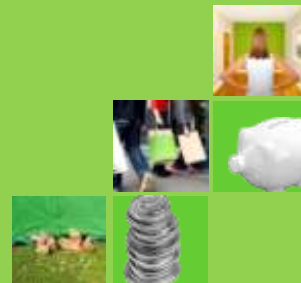
- To track and maintain all of the system related information in a spreadsheet
- Wasn't the best solution.... (obviously)



Options – we thought of

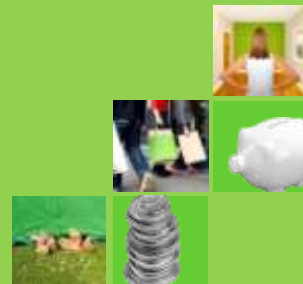
- Three options were investigated:
 1. Purchase a CMDB solution from a vendor
 2. Develop an in-house solution using a html front-end with SQL database
 3. Develop a solution using SharePoint.

- All options were explored but it became quickly apparent that SharePoint was the preferred option...



Why SharePoint?

- We already owned it..
- Tactical and Strategic Fit.....
- Expertise
- Familiarity with SharePoint functionality
- Low cost and rapid prototype ability



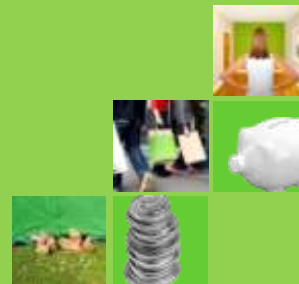
Pros and Cons of using SharePoint

Pros

- SharePoint was already used extensively throughout the company
- Quick development and implementation time-frame
- Much cheaper option than buying an off-the-shelf product
- SharePoint has the ability to link to other Microsoft applications, eg. SCOM, SCCM
- SharePoint solutions have the ability to be extended over time by internal resources
- Provides a unique ability to combine documentation with technology

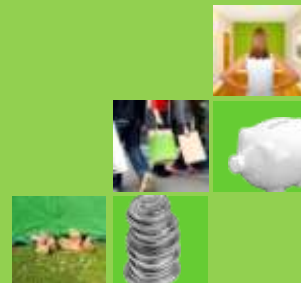
Cons

- Does not have the automatic discovery options that come with CMDB products
- Greater investment in time to keep the data current




Solution - KB Sysview

- The existing data in the Excel spreadsheet was converted to SharePoint lists
 - Applications, servers, processes, users and resolvers
- Developed a solution “KB Sysview” using SharePoint custom pages
- KB Sysview: a ‘One-stop-shop’ providing:
 - Categorisation of all items,e.g. applications, servers, processes, etc
 - Overview of the system or process
 - Implications if the system or process fails
 - Workarounds
 - Dependencies between other systems/processes
 - Business owners, stakeholders, SMEs, user and resolver groups
 - Links to other systems and/or information



KB Sysview Home Page

It's ours

KB Sysview [Advanced Search](#)

[KB Systems](#) | [Help](#) | [Feedback](#) | [Search](#) Site Actions -

[View All Site Content](#)

Documents

Lists

- All KB Systems
- View Latest
- Quick Links

Discussions

Sites

People and Groups

Help

Search

[Recycle Bin](#)

List of all KB Systems


KB Sysview

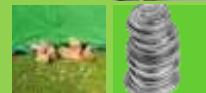
<h3>Application</h3> <p>The Application System Type describes programs that perform a specific function. For example, Activate, In Touch, etc.</p>	<h3>External Company</h3> <p>The External Company System Type denotes third parties that provide or receive data from Kiwibank. For example, EDS, Westpac, etc.</p>	<h3>Infrastructure</h3> <p>The Infrastructure System Type is used to denote important hardware components that are utilised by various applications within Kiwibank.</p> <p>Most infrastructure items are aliases that have been created to represent hardware that fulfils a specific function. You can view the individual server items under the Servers System Type.</p> <p>Examples of Infrastructure is Middleware, IVR, CISCO VoIP, etc.</p>	<h3>Load Balancer</h3> <p>The Load Balancer System Type is specific only to Load Balancers.</p> <p>Load balancing helps make networks more efficient. It distributes the processing and traffic evenly across a network, making sure no single device is overwhelmed.</p>
<h3>Processing</h3> <p>The Processing System Type denotes major processing within Kiwibank.</p> <p>Most Processing types are used to represent the programs that run overnight, operated by Datacom.</p>	<h3>Report</h3> <p>The Report System Type denotes important reports that are generated within Kiwibank.</p>	<h3>Router</h3> <p>The Router System Type is specific only to Routers.</p> <p>This is a hardware device that routes data from a local area network (LAN) to another network connection.</p>	<h3>Server</h3> <p>The Server System Type represents all servers in production.</p> <p>These do not include servers used for development or testing.</p>
<h3>Service</h3> <p>The Service System Type represents all services that are supplied by third parties to Kiwibank. Typically most services tend to be web-based.</p> <p>For example: JP Morgan, Quest, etc.</p>	<h3>Switch</h3> <p>The Switch System Type is specific only to Switches.</p> <p>A switch is used to network multiple computers together and can limit the traffic to and from each port so that each device connected to the switch has a sufficient amount of bandwidth.</p>		

Quick Links

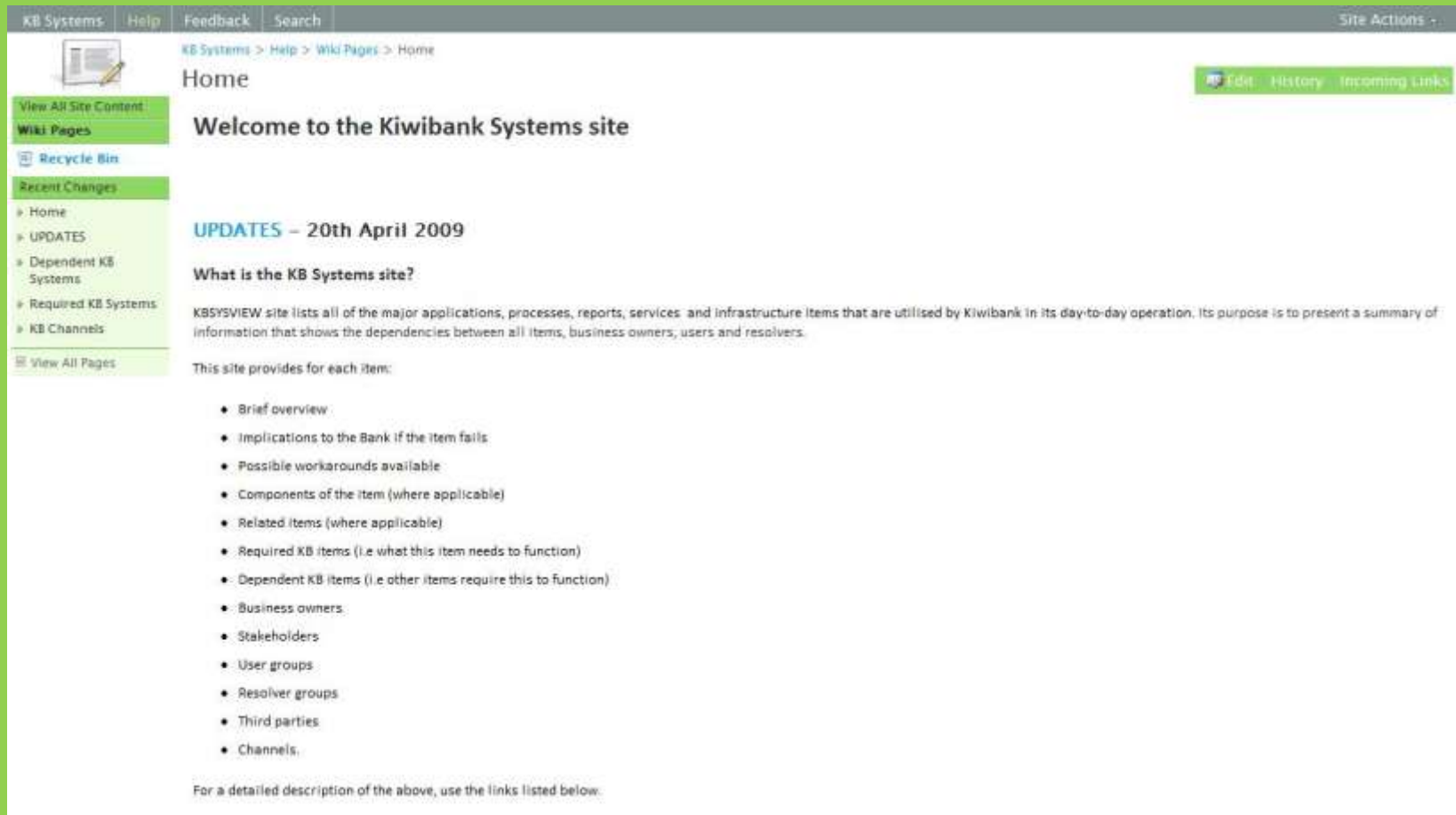
- Add External Parties
- Add System Types
- Add Systems
- Feedback and Comments

[Add new link](#)





KB Sysview Help Page



The screenshot shows the KB Sysview Help Page. At the top, there is a navigation bar with links for 'KB Systems', 'Help', 'Feedback', and 'Search'. On the right side of the navigation bar, there is a 'Site Actions' menu. Below the navigation bar, there is a breadcrumb trail: 'KB Systems > Help > Wiki Pages > Home'. The main heading is 'Home'. To the right of the heading, there are three buttons: 'Edit', 'History', and 'Incoming Links'. Below the heading, there is a section titled 'Welcome to the Kiwibank Systems site'. Underneath this, there is a section titled 'UPDATES – 20th April 2009'. The main content area is titled 'What is the KB Systems site?' and contains a paragraph explaining the purpose of the KB Sysview site. Below this, there is a section titled 'This site provides for each item:' followed by a bulleted list of items. At the bottom of the page, there is a paragraph stating 'For a detailed description of the above, use the links listed below.' The left sidebar contains several links: 'View All Site Content', 'Wiki Pages', 'Recycle Bin', 'Recent Changes', 'Home', 'UPDATES', 'Dependent KB Systems', 'Required KB Systems', 'KB Channels', and 'View All Pages'. The bottom right corner of the page features a collage of small images, including a person, a piggy bank, and a stack of coins.

KB Systems | Help | Feedback | Search | Site Actions

KB Systems > Help > Wiki Pages > Home

Home

[Edit](#) [History](#) [Incoming Links](#)

Welcome to the Kiwibank Systems site

UPDATES – 20th April 2009

What is the KB Systems site?

KB SysVIEW site lists all of the major applications, processes, reports, services and infrastructure items that are utilised by Kiwibank in its day-to-day operation. Its purpose is to present a summary of information that shows the dependencies between all items, business owners, users and resolvers.

This site provides for each item:

- Brief overview
- Implications to the Bank if the item fails
- Possible workarounds available
- Components of the item (where applicable)
- Related items (where applicable)
- Required KB items (i.e. what this item needs to function)
- Dependent KB items (i.e. other items require this to function)
- Business owners
- Stakeholders
- User groups
- Resolver groups
- Third parties
- Channels

For a detailed description of the above, use the links listed below.

Adding a Record

KB Systems: New Item OK Cancel

Spelling... * indicates a required field

KB System Name *

IP Address
Contains the IP address of the server

Server Alias

KB System Type

Purpose

Failure Implications

Impact
Impact to the bank if item unavailable:
1=High customer/business impact, directly affects a channel
2=No immediate customer impact, but high business impact
3=No immediate customer impact, low internal impact and high redundancy

Work Around

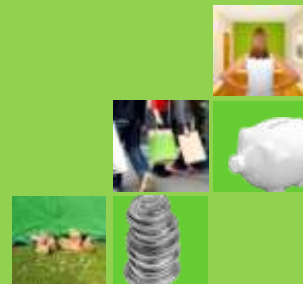
Maintenance Window
 Specify your own value:

For scheduled maintenance. Choose from the predefined list, or provide unique time-based information.

Components
Activate KB
Activate PL
Activate Veda Advant
Active Directory
ANZ
ADA Generator
AP Report

(This system is comprised of these other items)

Related KB Systems



Managing Keyword Searches

KB Systems | Help | Feedback | Search | Site Actions ▾

KB Systems > Keywords

Manage Keywords

Find keywords where:

Keyword Contains

1 - 17

Keyword	Best Bets	Synonyms	Contact	Expiry Date ↓
Activate	Activate	bb;kb;pl		Never Expires
Company	External Companies	external;organisation;party		Never Expires
IVR	Interactive Voice Response (IVR);Infrastructure	call;ivan;ivn;response;voice		Never Expires
VOIP	VOIP Infrastructure;Infrastructure	calling;cisco;ip;protocol;sysco;voic		Never Expires
In Touch	In Touch	intouch;touch		Never Expires
Kiwibank Managed Customers	Kiwibank Managed Customer	kb mac;kbmac;mac		Never Expires
Quest	Quest	qwest		Never Expires
HP Quality Centre	HP Quality Centre	HP;HP Quality;hpquality;Quality		Never Expires
PAPS	PAPS	loaded;pap;reload;reloadable;reloaded		Never Expires
Credit Control System	Credit Control System	leah;Lee;leia		Never Expires
Jadestar	Jadestar	hris;jade		Never Expires
Data Warehouse	Data Warehouse	datawarehouse;dwh;dwh01		Never Expires
Postilion	Postilion Switch;Postilion Office	post;postillion;postilon;postlon		Never Expires
Phone Banking	Phone Banking	phoen;phon		Never Expires
GEDI	GEDI	jedi;star wars		Never Expires
Imprint	Imprint	inprint		Never Expires

Submitting Feedback

KB Systems | Help | Feedback | Search | Site Actions -

KB Systems > Feedback

Feedback

Please provide feedback for any improvements you think would make this application more useful for KB users.

New - Actions - Settings - View: All Items -

Title	Feedback System Type	Feedback and Comments
PIN@Store	Service	Hi, I've been trying to locate info on the PIN @ Store functionality - is this going to be added at some stage? - i.e. devices in the store, middleware, servers, dependencies etc etc etc?
System Missing - Activate Veda Advantage	Application	Activate Veda Advantage is part of the Activate suite of systems. I think this should be added to this list. Details as follows: Application: Activate Veda Advantage Required KB Systems: KBPDSQLCRM01 FSWINDNTCCACT Dependent KB Systems: N/A Business Owners: Helen Hatchard Nick Astwick ActivateKB and ActivatePL are dependent on ActivateVedaAdvantage contact me on ext.47066 for any questions/further details.
Data Warehouse Business Owner	Infrastructure	Firstly - great site and excellent approach taken! Secondly - Unfortunately I am not the Business Owner of the Data Warehouse. I don't think it has an owner. If anyone, it would be Bohdan. Note that we have an MIS Reporting Server that I am the Business Owner of. Tracy Bellamy, ext. 47036
PIN Loading	Application	The PIN at Branch project (K80132) has made the PIN loading process as described redundant. There is no longer an Outbound call to customers, instead customers are directed to load PINs at the store.

Logging Enhancements

KB Systems | Help | Feedback | Search | Site Actions

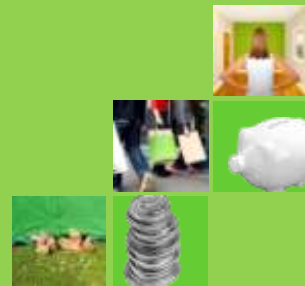
KB Systems > Enhancements

Enhancements

Creating enhancements for KBsysview

New | Actions | Settings | View: All Tasks

Title	Assigned To	Status	Priority	Due Date	% Complete
Status : Completed (3)					
Sort order	Chandima Kulathilake	Completed	(2) Normal	28/11/2008	100%
Add a links field to the form	Chandima Kulathilake	Completed	(2) Normal		100%
Multiple Linkage Capability under Related Information	Chandima Kulathilake	Completed	(2) Normal	27/02/2009	100%
Status : Not Started (4)					
Help text on display form	Chandima Kulathilake	Not Started	(2) Normal	31/07/2009	
Search functionality	Chandima Kulathilake	Not Started	(2) Normal	31/08/2009	
SCOM IB Dashbaord to publish to Sharepoint	Chandima Kulathilake	Not Started	(2) Normal		
Sort order within records	Chandima Kulathilake	Not Started	(2) Normal		



Future Enhancements

- Assign content owners, then create an automated workflow process to schedule and manage content reviews and updates
- Increase integration with other products, e.g. Service Desk, SCOM, SCCM

