ActiveBatch® IT Automation
Case Study Kit

How ActiveBatch is Redefining IT Automation for . . .

SUBWAY

Türkiye'nin Finans'ı
Türkiye Finans

RelayHealth

From an Elemental Approach
To an Architectural Strategy

From Multiple Scheduling Tools
To a Single Automation Solution

From Custom Scripting
To Production-Ready Integrations

From a Legacy Job Scheduler
To a Solution Designed for Change

ADVANCED SYSTEMS CONCEPTS, INC.

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ActiveBatch® IT Automation
Customer Success Story

SUBWAY®
Adopts an "Architectural" Approach to Automating Teradata



About the Company

Company: SUBWAY®
Industry: Restaurant

Brief Company Overview:

SUBWAY® is an American fast food restaurant franchise that primarily sells submarine sandwiches and salads. SUBWAY® is one of the fastest growing franchises in the world with 39,517 restaurants in 102 countries and territories. It is the largest single-brand restaurant chain globally and is the second largest restaurant operator globally.

Case Study: SUBWAY® Adopts an "Architectural" Approach to Automating Teradata®

Case Study Highlights

- ✓ Centralize Disparate Technologies, Databases, Applications And More
- ✓ Dynamically Manage Workflows And Dependencies From A Central Console And Break Complex Workflows Into "Manageable Chunks"
- ✓ Run Teradata Utilities Directly From ActiveBatch And Centralize Processes
- ✓ Improve Report Deliverability And Increase Staff Efficiency

Orchestration of Complex Processes and Dependencies

As one of the fastest growing restaurant franchises in the world, SUBWAY® relies heavily on the timely processing of operational and sales data from its more than 30,000 restaurants worldwide. The foundation for the timely arrival of this information is a data warehousing project that relies on information being passed between a collection of data sources, legacy platforms and a Teradata Data Warehouse Appliance that was incorporated to address growing data volumes. To orchestrate these complex processes and manage dependencies between these systems, SUBWAY® relies on ActiveBatch® Workload Automation and Job Scheduling from Advanced Systems Concepts, Inc.

The original catalyst for deploying ActiveBatch came in 2010 prior to SUBWAY® implementing the Teradata Data Warehouse Appliance. At the time, the company was relying on a disparate collection of SQL servers to schedule SSIS and DTS packages to integrate a legacy OpenVMS system, a newer .NET/SQL platform and a data warehouse solution. "Being able to dynamically manage the dependencies between SSIS and DTS jobs was critical, because we couldn't run the data warehouse load until the OpenVMS and .NET platform was populated and synchronized," says Ciana Barrueco, Database Administrator at SUBWAY®.

Automating SQL Server jobs across disparate machines was difficult because SQL Server Agent provides no ability to manage dependencies between different servers or start/stop a job within a workflow. As a result, the SUBWAY® database team used "lots of manual handoffs and flag waving" to manage dependencies, Barrueco says.

> *"The [SUBWAY®] team would spend approximately 10 hours a week managing and updating the data loads, managing the production and development environments and scheduling backups. With ActiveBatch that's been reduced to less than 4 hours a week."*
>
> - Ciana Barrueco, Database Administrator at SUBWAY®

"To try to streamline the process, one step of each SQL job was supposed to pass data to a job on another server, but we were still literally jumping from one server to the next trying to manage everything."

A better solution was needed, so in 2010 SUBWAY® went to market for an enterprise job scheduling solution to unify and automate its batch processes. Ease of use, cross-platform support and competitive pricing were paramount. Microsoft Orchestrator was also considered,

but in the end ActiveBatch was selected, thanks in part to a flexible pricing/licensing model and ActiveBatch's Integrated Jobs Library, which provided the team with an unparalleled graphical interface of workflows and dependencies between jobs.

Deployed later that year, the number of ActiveBatch end users has since grown to include 15 members of the SUBWAY® database team, all of which have realized the benefit of using ActiveBatch over the previous system of scheduling jobs across SQL servers. With ActiveBatch, the team can dynamically manage workflows and dependencies from a central console and has broken these complex workflows into "manageable chunks" that can be dynamically managed based on event triggers, such as a database being updated or an FTP being sent/received, something the team completely lacked when scheduling via SQL Server. "We can now re-execute pieces of the workflow if it's necessary, as opposed to rerunning the entire workflow from the start," Barrueco says. Overall, Barrueco estimates that using ActiveBatch requires 75% less time over using SQL Server Agent in terms of building new workflows, updating existing ones, time saved from manually managing dependencies and more reliable execution of processes.

Enter Teradata to Meet Data Volumes

In 2011, SUBWAY® embarked on a project to implement a Teradata Data Warehouse Appliance to enable the IT organization to meet projected data volumes over the coming years. Initially SUBWAY® investigated various ETL scheduling tools to automate the Teradata environment, but it became obvious that using ActiveBatch would be ideal since any Teradata loads would be dependent on the batch processes already automated within ActiveBatch. "In terms of streamlining the end-to-end automation of our data warehousing processes, it was clear that using a single automation solution was the best approach," says Leslie Kosturko, Senior Data Manager at SUBWAY®. "From a reporting standpoint, these processes would be responsible for feeding data downstream to a MicroStrategy BI solution for sales and profitability reports, operational reports from the various franchises and HQ-level reports."

"In terms of streamlining the end-to-end automation of our data warehousing processes, it was clear that using a single automation solution was the best approach."

- Leslie Kosturko, Senior Data Manager at SUBWAY®

Case Study: SUBWAY® Adopts an "Architectural" Approach to Automating Teradata®

Advanced Systems Concepts worked with the Teradata Solutions Architect team to build the Teradata Extension, which would add a series of production-ready Job Steps for common Teradata utilities to the ActiveBatch Integrated Jobs Library, including *StartPTJob*, *LoadData*, *SQL Query*, and *ARC*. Two critical requirements for SUBWAY® was the ability for ActiveBatch to run Teradata Parallel Transporter and SQL scripts directly from within ActiveBatch. In addition, the ability to schedule and run ARCMAIN backups utilities was critical. "The Teradata Database doesn't have a traditional backup/recovery tool," says Gerry Brinkman, Senior Solution Architect at Teradata. "The utility itself is a relatively low-level, script-driven utility that has no policies and procedures around it, so you really need a scheduler to automate and manage those processes dynamically. The ActiveBatch Extension for Teradata really added that automation framework to allow SUBWAY® to automate key Teradata processes."

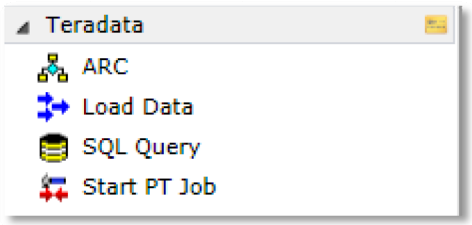
> *"Teradata doesn't have a traditional backup/recovery tool. The utility itself is a relatively low-level, script driven utility that has no policies and procedures around it, so you really need a scheduler to automate and manage those processes dynamically."*
>
> - Gerry Brinkman, Senior Solution Architect at Teradata

Less Scripting, More Drag and Drop Automation

The production-ready Job Steps within the Teradata Extension has saved the SUBWAY® database team the time and resources of scheduling these utilities via a command line script. For example, the *StartPTJob* provides the team with a field to enter the database script and provides dropdown menus for job variables and parameters that are auto-populated based on variables that are passed from preceding jobs. "The ability to display the entire workflow and all the dependencies and variables that are being passed in a graphical format dramatically simplifies the management and updating of these processes, saving us time," says Trevor McDonald, database administrator at SUBWAY®.

The database team also leverages ActiveBatch's event automation architecture and Flow Control Job Steps that are part of the Integrated Jobs Library to dynamically manage the execution of the Teradata workflows. The event automation architecture goes beyond the static nature of date/time scheduling and allows jobs and workflows to be triggered and managed based on IT and business events, such as an email or database trigger, file constraints and others. For example, Barrueco leverages ActiveBatch job constraints and variables for the execution of SQL Server SSIS jobs to ensure all rows within a SQL table are populated before proceeding to the next job within the workflow, which helps to ensure downstream data quality.

ActiveBatch® Integrated Jobs Library Job Steps for Teradata



Case Study: SUBWAY® Adopts an "Architectural" Approach to Automating Teradata®

The Flow Control Job Steps such as *ForEachRow*, *If-Else* and *If-Branch* are used to manage and direct jobs within workflows based on conditions and dependencies, allowing users to simply drag and drop a Flow Control Job Step into the workflow in the appropriate location. For example, SUBWAY® uses the *ForEachRow* Job Step prior to a SQL Server Job Step to execute a SQL command to retrieve each row of values from a SQL table to be passed downstream to Teradata. Other Flow Control Job Steps set a conditional branch to allow jobs to be looped.

Job reusability within ActiveBatch has also proven invaluable. After the initial implementation of Teradata, the database team built the workflows within ActiveBatch to do a parallel load of both the development and production environments, but quickly realized that to ensure the production environment was working with valid data, the data loads should be done separately. "When we switched the loading of the development and production environments into separate workflows within ActiveBatch, many of the jobs within those workflows shared common variables, steps, etc.," Barrueco says.

To save time in the development of these new workflows, Barrueco leveraged ActiveBatch Reference Jobs, which gives a user the ability to use a single job within ActiveBatch as a template to be "referenced" throughout multiple workflows. "That was great, because it meant we only had to make the changes once at the template level and those changes are passed down automatically to the referenced jobs. It's a big time saver."

> *"The ability to display the entire workflow and all the dependencies and variables that are being passed in a graphical format dramatically simplifies the management and updating of these processes, saving us time."*
>
> - Trevor McDonald, Database Administrator at SUBWAY®

The Benefits

Overall, the database team estimates that managing these data warehousing processes within ActiveBatch using the Integrated Jobs Library, event automation framework and other capabilities is twice as fast as using command line scripts to execute these utilities, according to Barrueco. "The team would spend approximately 10 hours a week managing and updating the data loads, managing the production and development environments and scheduling backups," Barrueco says. "With ActiveBatch that's been reduced to less than 4 hours a week."

Report Deliverability Reaches 99.5%

Kosturko says that using ActiveBatch to manage the end-to-end automation of the underlying ETL and data warehousing processes that feed the franchise profitability and operational reports has improved report deliverability to 99.5%.

Moving forward, Kosturko only expects these data warehousing processes to become increasingly complex as this franchise-based business expands globally and reporting becomes increasingly intricate."Data volumes are only going to increase. We'll need to be able to meet those demands and ActiveBatch will be the automation solution to automate our datacenter."

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ActiveBatch® IT Automation
Customer Success Story

Türkiye Finans Is Servicing Web Services in a New Way with Workload Automation



Türkiye'nin Finans'ı
Türkiye Finans

About the Company

Company: Türkiye Finans
Industry: Financial: Banking

Brief Company Overview:
Türkiye Finans serves over 1 million customers at 182 branches and with over 3,350 employees. It was acquired on March 31, 2008 by The National Commercial Bank (NCB), the largest bank in Saudi Arabia and one of the leading banks in the Middle East. Türkiye Finans maintains its vision of becoming a leading participation bank.

ActiveBatch ENTERPRISE SCHEDULING

Case Study:
Servicing Web Services in a New Way

Türkiye'nin Finans'ı
Türkiye Finans

Case Study Highlights

- ✓ Build Workflows that Trigger Jobs Based on Events
- ✓ Achieve a Central Point of Automation and Integrate Processes that Span Multiple Applications and Databases Across the Enterprise
- ✓ Manage Workflows via the Service Library which is a Dynamic SOA and Web Services Tool
- ✓ Automatically Retrieve Processing Data to Provide Audit and Reporting Data
- ✓ Ability to Monitor ActiveBatch via the SCOM Console for a Central Point of Monitoring
- ✓ Automate Tasks, Workflows and the Management and Provisioning of Resources

Servicing Web Services with Automation

With over one million customers and nearly 200 branches, Turkiye Finans is a leading commercial and participation bank in the Middle East. Driven by its vision to become the premier source of principles-based banking and investment for individuals and business owners in Turkey, the bank is constantly making improvements in all its processes, and IT is no exception.

To better enable IT to deliver on its ambitious business goals to improve financial processes over the long term, Turkiye Finans' IT department realized the company needed to locate a best-in-class automation solution, and it found that solution with ActiveBatch® Job Scheduling and Workload Automation from Advanced Systems Concepts, Inc.

Operating in a predominantly Microsoft IT environment, Turkiye Finans relies heavily on a collection of PowerShell, .NET Assemblies, Microsoft WCF LOB Adapters and Web Service protocols executed via Windows Task Scheduler and SQL Server Agent. But Task Scheduler presented its own issues, primarily the inability to build workflows that triggered jobs based on events, such as a file being downloaded, and the need to write scripts and conversation files for the long list of jobs that Turkiye Finans was looking to automate."You could easily make a mistake," says Mucahit Yavuz, release and patch manager, IT Operations at Turkiye Finans. "These scripts were automating critical jobs for the transfer of financial and transactional data, payments, reports, etc. Each time we defined a job in Task Scheduler or had to make an update, a single mistake could block the execution of all other scheduled operations. As the list grew and the jobs became more complex, the workload became unmanageable."

The increased workload was driven primarily by the limitations of Task Scheduler and SQL Server Agent. Yavuz was using Task Scheduler to schedule the various PowerShell scripts, Microsoft WCF and Web Services protocols, but he had to use a third-party program and an XML configuration file to run the jobs. In addition, scheduling jobs using Windows Task Scheduler meant defining and executing the same job on individual servers, which in turn required security credentials to be entered each time.

"You could easily make a mistake. These scripts were automating critical jobs for the transfer of financial and transactional data, payments, reports, etc. Each time we defined a job in Task Scheduler or had to make an update, a single mistake could block the execution of all other scheduled operations. As the list grew and the jobs became more complex, the workload became unmanageable."

- Mucahit Yavuz, Release and Patch Manager, Turkiye Finans

Case Study:
Servicing Web Services in a New Way

From Task Scheduler to End-to-End Automation

In 2009, Turkiye Finans went to market, and after considering numerous vendors, selected ActiveBatch. With ActiveBatch in place, the IT organization has a central point of automation to schedule and execute workflows critical to the success of the business. This includes processes that transfer financial data to customer accounts that were previously being executed by SQL Server Agent. Microsoft WCF, .NET Assemblies and PowerShell scripts are responsible for executing bill payments or delivering credit card transactions for processing.

The cornerstone of managing and executing these workflows is the ActiveBatch Service Library, which has altered the way Yavuz executes and manages many of the custom workflows the team uses. The Service Library is a dynamic SOA and Web Services tool that supports a multitude of integration points, including .NET Assemblies, Command-Line, Stored Procedures and others. Yavuz uses the Service Library to call upon a .NET Assembly or Web Service, retrieve those methods and provide those methods as reusable Job Steps within the ActiveBatch Integrated Jobs Library. Values returned from these methods are passed downstream to be used as execution variables to trigger ensuing jobs.

The ability to retrieve methods and parameters from Web Services and .NET Assemblies and automatically pass them to other s has streamlined what had previously been an arduous and error-prone process. In addition, Yavuz uses ActiveBatch to automatically retrieve processing data to provide audit and reporting data, which wasn't an option when using a third-party program and an XML configuration file. "We're now able to process data returning from the methods ActiveBatch retrieves," Yavuz says. "It's a huge time saver and gives us a level of control and management over these processes that never existed before ActiveBatch."

For SQL Server scheduling, Yavuz has seen many advantages, such as the ability to execute SQL Server Jobs across multiple machines without having to schedule them individually. Yavuz can also combine these jobs with PowerShell scripts and Web Services to integrate processes that span multiple applications and databases. For a series of monthly, quarterly and yearly financial reports, Yavuz leverages the SSRS (SQL Server Reporting Services) Jobs Step within ActiveBatch's Integrated Jobs Library to generate these reports and then automatically distribute them via a single workflow within ActiveBatch.

"Automated tasks running on multiple platforms have all been moved to ActiveBatch. As a result, scheduling, running and monitoring all of the automated tasks has become much easier and more manageable thanks to ActiveBatch. High availability also has been provided by informing the relevant parties immedately when a problem occurs, thus reducing the time of action in the event of an emergency."

- Celal Hakyemez, Assistant Manager of IT Operations Management, Turkiye Finans

Case Study:
Servicing Web Services in a New Way

A Central Point of Automation Means a Central Point of Monitoring

One key aspect of the ActiveBatch implementation lies with the ability to monitor ActiveBatch via System Center Operations Manager (SCOM). This has allowed the IT Operations team to overcome a major challenge to scheduling jobs with disparate scheduling tools: a central point of monitoring. “When we were running jobs via SQL Server Agent and Windows Task Scheduler, we had no integration with SCOM. As a result, IT Operations could miss errors for SQL Server jobs. If that happened, the issue wouldn’t be corrected until somebody else came along and realized the scheduled task wasn’t completed.”

As part of their ActiveBatch implementation, Turkiye Finans purchased the ActiveBatch Management Pack for SCOM, which provides direct integration between ActiveBatch and SCOM and gives IT Operations the ability to monitor ActiveBatch via the SCOM console, including the ActiveBatch Job Scheduler, Execution Agents and ActiveBatch Objects, such as Jobs and Plans. Yavuz is able to simply “tag” any ActiveBatch Object he would like monitored by SCOM, resulting in an alert automatically being raised on the SCOM console in the event of a failure. Since making the switch over to ActiveBatch and using the Management Pack for SCOM, Turkiye Finans has experienced 45% faster resolution times for failures.

Moving forward, Turkiye Finans is expanding its ActiveBatch implementation to automate workflows to include a new ERP system. While the IT organization is predominately Microsoft-based, the new ERP solution runs off an Oracle database, and Yavuz is excited about executing PL-SQL blocks via ActiveBatch to integrate the new architecture into the existing one. “We’re building workflows that will run jobs on a SQL server and pass data to an Oracle database for the ERP system. It’s about automating the passing of data between various data sources to allow us to integrate various components of our IT infrastructure.”

Additionally, Yavuz is gearing up ActiveBatch to manage Turkiye Finans’ rapidly expanding virtual environment to manage VMware and eventually Microsoft Hyper-V, including creating, deleting and provisioning virtual machines “on the fly” as part of broader workflows that will run jobs across various virtual machines. “ActiveBatch will not just automate tasks and workflows but also automate the management and provisioning of resources throughout the IT organization. ActiveBatch is expanding into an enterprise-wide IT automation tool.”

Turkiye Finans is confident in moving forward with ActiveBatch thanks largely to the technical support the IT organization receives from Advanced Systems Concepts. “The answers are accurate and timely,” Yavuz says, and with ActiveBatch’s ease of use and simplicity of implementation and upgrade, Yavuz knows the days of requiring vendor, on-site support are no longer required. “With the evolution of technology, there’s no need to be in the same place to resolve an issue, and that’s a testament to the simplicity of ActiveBatch.”

“ActiveBatch has been important for our company in terms of automation and scheduled tasks. Scheduled tasks are more managable, flexible, stable and consistent. ActiveBatch makes it easy to design complex workflows that span heterogeneous systems.”

- Fahri Obek, Executive President of IT, Turkiye Finans

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ActiveBatch® IT Automation
Customer Success Story

RelayHealth
Insures Reliable, Centralized IT Process Automation



About the Company

Company: RealyHealth
Industry: Healthcare Services

Brief Company Overview:
RelayHealth provides the connectivity and solutions that enable constituents across healthcare to exchange information securely and conveniently. By connecting patients, providers, pharmacies, payers and pharmaceutical manufacturers, RelayHealth offers real-time solutions to streamline interactions throughout healthcare. The net result: improved care, faster access, lower costs and enhanced bottom lines.

Case Study:

RelayHealth Insures Reliable, Centralized IT Process Automation

RelayHealth

Case Study Highlights

- ✓ Achieve Real-Time Business Continuity
- ✓ Drag-and-Drop Production Ready Job Steps to Create Workflows Without the Need for Scripting
- ✓ Centralized Management for Compliance and Control to Ensure Unauthorized Are Not Made to Production Workflows

A Physical and Virtual Infrastructure

RelayHealth sits at a critical junction within the healthcare and pharmaceutical industries, connecting the people and information to facilitate better service. Specifically, RelayHealth, a division of McKesson, offers connectivity services and integration by providing clinical, financial and administrative communication between patients, providers, pharmacies, manufacturers and more. "We're the ones in the background that help make everything go round and round," says Tracy Thompson, Senior Director of Technical Services for RelayHealth.

To facilitate and automate these interactions with third-party vendors, customers and partners, RelayHealth relies on a vast array of both overnight batch processes and workloads that run in real-time, executing across an infrastructure that consists of both physical and virtualized machines. To improve the coordination of these processes, in 2010 RelayHealth went to market for a workload automation solution to centralize its IT process automation requirements. That solution was ActiveBatch® Job Scheduling and Workload Automation from Advanced Systems Concepts, Inc.

From Scripts to a Real-Time Business Continuance Solution

At the core of RelayHealth's business are claims, including medical, pharmaceutical and dental, sent to RelayHealth 24 hours a day, containing patient information such as eligibility and prescription data, prior authorizations and more. "Let's say somebody switches employers and receives a new insurance plan with different benefits. We receive that information in a batch file. It's our job to go in and term your coverage so you'd be activated on the new plan and send the updated data back to the pharmacy, insurer, whomever," Thompson says.

To automate these processes previously, a collection of Window and Perl scripts were used, executed by a disparate collection of older, manually-operated scheduling solutions. "We had no central point of control or monitoring; everything was based on basic date/time execution" Thompson says. "We needed a real-time, business continuance solution."

"We had no central point of control or monitoring; everything was based on basic date/time execution. We needed a real-time, business continuance solution."

These scripts have now been moved into ActiveBatch, where Thompson's team leverages both the Date/Time and event automation architecture within ActiveBatch to trigger their execution. "ActiveBatch has automated our batch operations entirely by looking at the files FTP route and either triggering the workflow with a file trigger or set schedule," Thompson says. "It's provided a single solution through which to execute and manage our disparate collection of scripts."

The addition of ActiveBatch has also allowed Thompson's team to move beyond the need for scripting. Many of the job steps that comprise these FTP workflows involve data encryption/decryption. To build these steps, Thompson's team has made heavy use of the production-ready Job Steps that are part of the Integrated Jobs Library, allowing the team to drag-and-drop OpenPGP encryption/decryption steps into workflows without the need for scripting.

For data recovery and backup, RelayHealth has leveraged ActiveBatch's Non-Cluster Failover for its primary datacenter in the Southeast U.S. and for the backup on the West Coast. "If we had a failure at our primary datacenter, ActiveBatch would pick up and start executing from our backup datacenter with no interruption to service. That was important when considering different vendors," Thompson says.

"ActiveBatch has automated our batch operations entirely by looking at the files FTP route and either triggering the workflow with a file trigger or set schedule. It's provided a single solution through which to execute and manage our disparate collection of scripts."

Centralized Management for Compliance and Control

The ability to ensure that unauthorized changes aren't made to production workflows that automate the movement of patient information is critical to comply with healthcare regulations. For RelayHealth, ActiveBatch's permission-based security framework is the catalyst that ensures those regulations are met.

ActiveBatch utilizes a full audit and security framework that limits the risk of unauthorized changes to any ActiveBatch Object. Changes to an ActiveBatch Job, Plan or Variable require managerial approval. "We have a master list that the Director of Data Operations and I have access to," Thompson says. "If any user attempts to change a variable, modify the frequency of a job executing, a plan variable, etc., we are notified of the change via the ActiveBatch alert mechanisms and have to approve it."

"We have a master list that the Director of Data Operations and I have access to. If any user attempts to change a variable, modify the frequency of a job executing, a plan variable, etc., we are notified of the change via the ActiveBatch alert mechanisms and have to approve it."

In this regard, ActiveBatch's monitoring and alerting has proven invaluable in keeping IT operations and clients abreast of any failures. "The functionality is so good that we've extended those alerts, such as an email alert, to customers and clients so they're fully aware," Thompson says. "It's mission-critical for the sort of failures that could affect SLA agreements we have with clients. We want to make sure everybody in the world is woken up when an SLA item is hit."

Case Study:

RelayHealth Insures Reliable, Centralized IT Process Automation

Thanks to ActiveBatch, that is now a rare occurrence. RelayHealth executes over 3 million jobs a month within ActiveBatch with a 99% success rate, a 10% improvement over RelayHealth's previous scheduling tools. This improvement, combined with reduced workload management, has meant that the IT organization has continued to expand their process automation initiatives without the need to hire additional personnel. "If we were still relying on scripting and manual automation of these processes, we would have had to expand our team. ActiveBatch has allowed us to do more with the same without the need of hiring an additional developer or architect," Thompson says.

Nor does Thompson see the expansion of ActiveBatch slowing anytime soon. "As we identify additional process types that can be fit under the ActiveBatch umbrella, we'll continue to grow and streamline our IT organization with ActiveBatch."

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