

RIGHT
NOW[®]



A dark blue silhouette of a mountain range with a central peak.
S U M M I T 0 9

PATTERNS FOR RIGHTNOW DATA INTEGRATION

Mark Ericson - Director Integration Technology

Chris Omland - Technical Product Manager



Agenda

- ▶ Connect Integration Patterns
- ▶ Integration Quadrant
- ▶ Integration Taxonomy
- ▶ Solving Integration Taxonomy Needs
- ▶ Customer Testimonial
 - TiVo
- ▶ Conclusion

Connect Integration Patterns

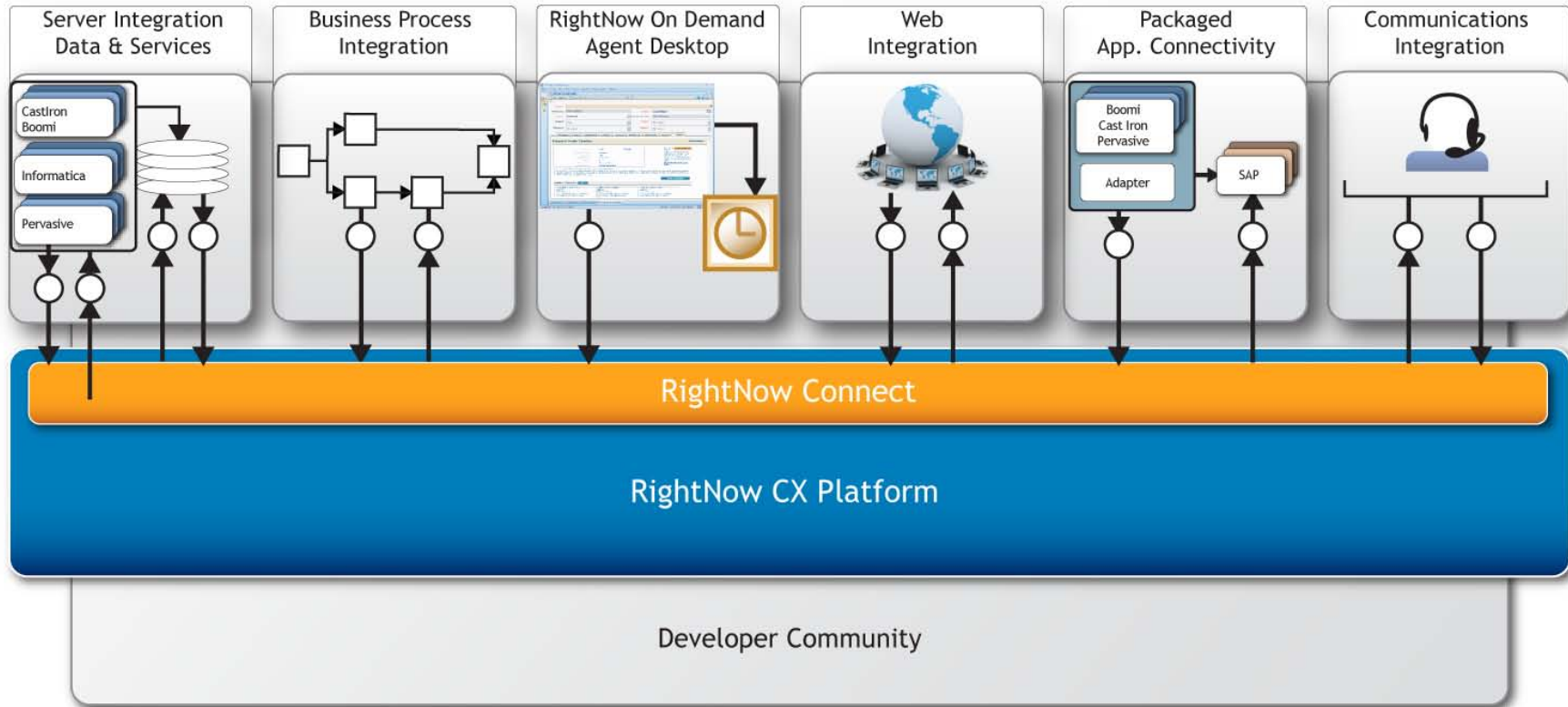
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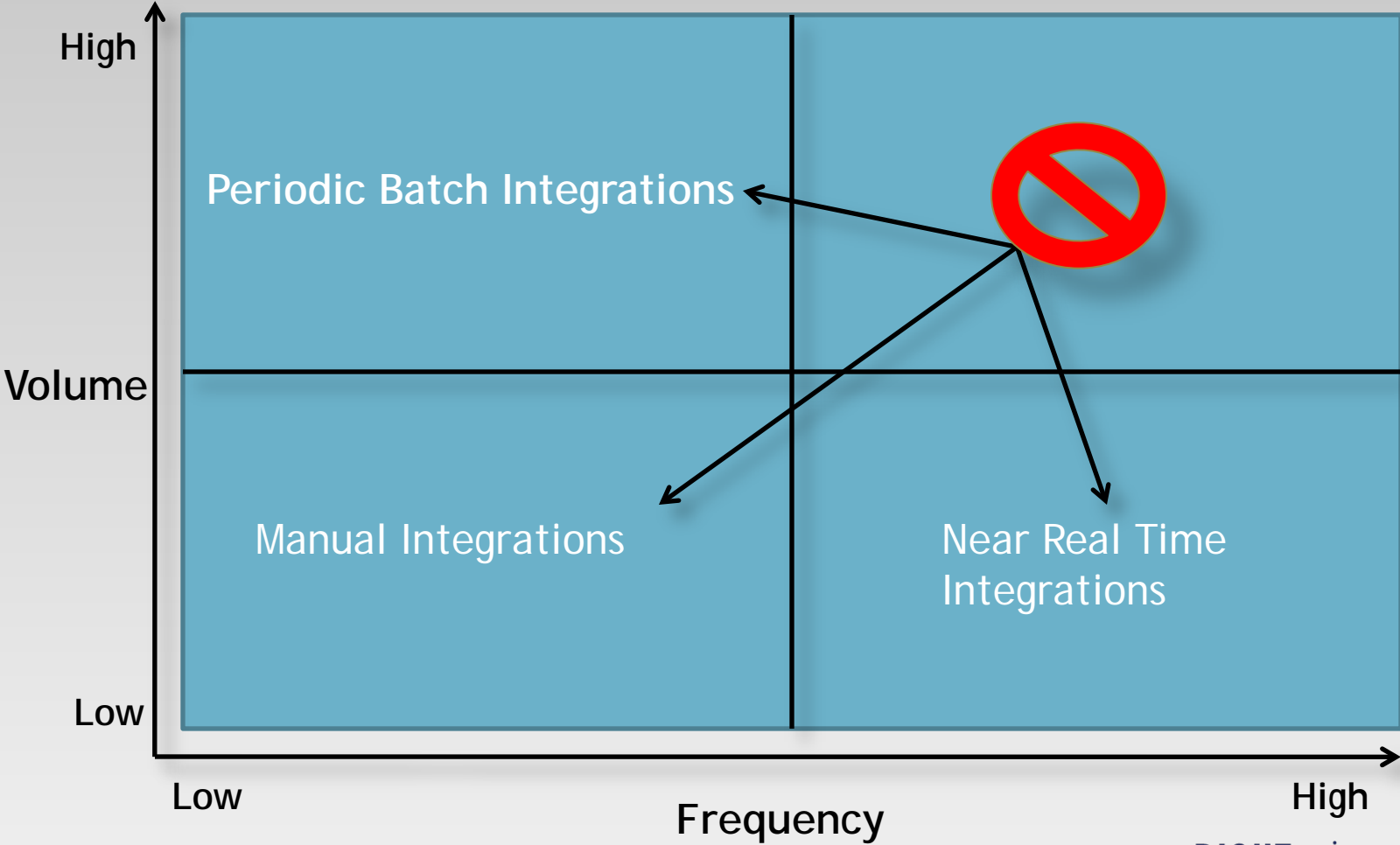
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Connect Integration Patterns



Integration Quadrant



Integration Taxonomy

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Integration Taxonomy

▶ Information Presentation

- Presentation of external data and applications

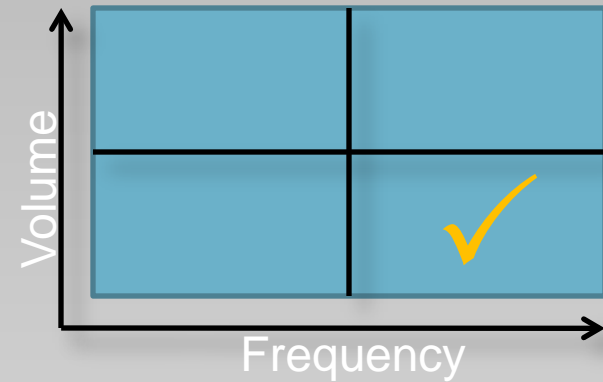
▶ Process Integration

- Inclusion in external business processes

▶ Data Integration

- Population of data
- Federation of data
- Synchronization of data

Information Presentation



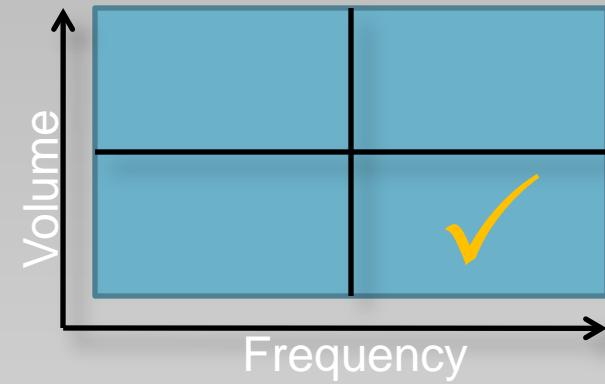
► What is the need?

- Dynamic interfaces for data contained in RightNow or external systems

► Use cases

- Dynamic voice self-service
 - Building voice self-service from the RightNow knowledge base
- Browser-based dashboard
- Contact center Key Performance Indicators (KPIs)
 - Average Handle Time, Calls in Queue, etc.
- Unified desktop
 - Embedding UI of external applications

Process Integration



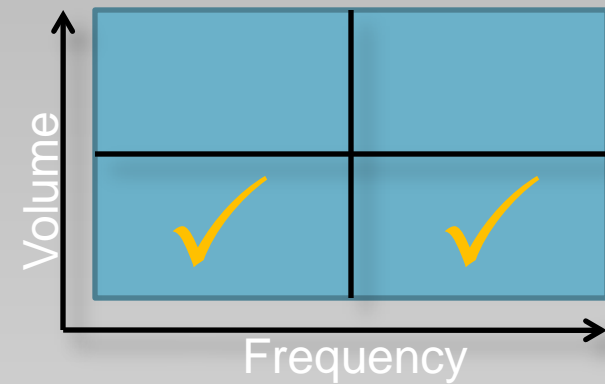
► What is the need?

- Inclusion of RightNow agent activity in external business processes

► Use Cases

- Order / Fulfillment Management
- Return Merchandise Authorization (RMA)
- Approval Process (Credit Approval)
- Service Scheduling / Routing
- Customer / Product Registration

Data Integration - Population



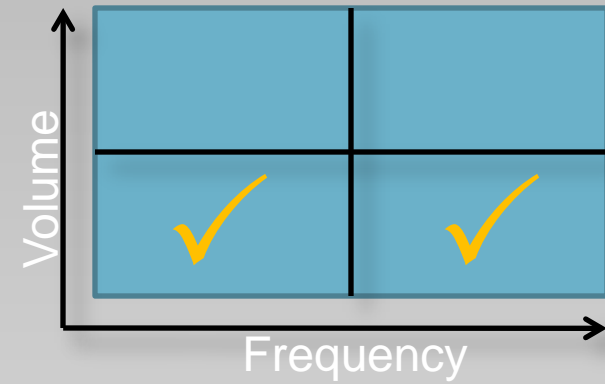
► What is the need?

- Import data from external sources into RightNow

► Integration Use Cases

- Data import from legacy system
 - One time initial import
- Manual import of data files
 - Tradeshow leads
 - Referral leads
- Automated import of periodic data drops
 - FTP upload

Data Integration - Federation



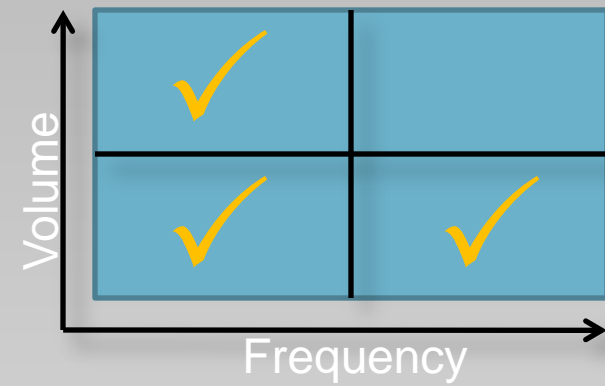
► What is the need?

- Single view of data residing in multiple systems

► Integration Use Case

- Order history
- Credit status
- Shipping information

Data Integration - Synchronization



► What is the need?

- Consistent data across multiple systems

► Integration Use Case

- Single view of customer
- Data cleansing
- Master data management (System of record)
- System migration / replacement

Demo - Synchronization

- ▶ Contact data synchronization across multiple systems
 - Present agent with data inconsistencies
 - Allow agent to select correct data
 - Update both systems with data selected by agent

RightNow Integration Solutions

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RightNow Integration Solutions

- ▶ External Data / Applications inside RightNow

RightNow Integration Solutions

► External Data / Applications inside RightNow

Integration Technology	Paradigm	Backward Compatible	Advantages	Disadvantages	Best for...
<u>Connect Desktop Add-in Framework</u>	Desktop extension & automation .NET extensibility libraries	YES	<ul style="list-style-type: none"> •Tight real-time integration with client-desktop •Rich extension and automation 	<ul style="list-style-type: none"> •Embedding web pages, extra effort 	<ul style="list-style-type: none"> •Automation of desktop •Tight-integration w/desktop •Multiple fine-grained controls •Real-time desktop scenarios •NET development skills

RightNow Integration Solutions

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<u>Desktop Integration (Javascript)</u>	Browser embedding & javascript integration API	YES (best effort)	<ul style="list-style-type: none"> •Quick and easy web page embedding 	<ul style="list-style-type: none"> •Limited integration capabilities & APIs 	<ul style="list-style-type: none"> •Embedding entire web pages •Web application can be modified •JavaScript programming skills

RightNow Integration Solutions

- ▶ We need to create, read, update, delete RightNow data from some external system or application

RightNow Integration Solutions

- ▶ We need to create, read, update, delete RightNow data from some external system or application

Integration Technology	Paradigm	Backward Compatible	Advantages	Disadvantages	Best for...
<u>Connect Data Integration</u>	client/server API libraries	YES	<ul style="list-style-type: none"> •High-level APIs w/helper functions. •Optimizations for batching. 	<ul style="list-style-type: none"> •Not all languages / platforms supported •Deployment of client side libraries 	<ul style="list-style-type: none"> •Most data integration scenarios •Bulk or discrete data integration •Client/server or server/server •Java, .NET or C++ developers

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<u>XML-API</u>	client/server XML over HTTP	YES * (May '09 forward)	<ul style="list-style-type: none"> •Low-level wire-protocol for XML skilled developers •Supported on "old" versions 	<ul style="list-style-type: none"> •Frozen, not 100% of capabilities 	<ul style="list-style-type: none"> •Strong XML development skills •Connect not available for language

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<u>ODBC</u>	ODBC-based database access	NO	<ul style="list-style-type: none"> •Direct database access •ODBC standard 	<ul style="list-style-type: none"> •Read-only •Delayed data (not real-time) •Exposes physical schema (fragile) 	<ul style="list-style-type: none"> •Tooling requires ODBC •Data isn't real-time •Reworking for upgrades OK

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<u>Data Integration Partners</u>	Data Integration Tooling (software or appliance)	YES * (depends on API)	<ul style="list-style-type: none"> •High-level integration tools •OOTB connectors for apps •Rapid deployment 	<ul style="list-style-type: none"> •Addtl expense of tooling 	<ul style="list-style-type: none"> •Server-to-server integration •Existing connectors for apps •near real-time synchronization •data cleansing •Complex multi-app scenarios •IT ETL skills (not necessarily coders)



SAP and RightNow Data Integration

October 2009

Mary Sasomsub
Application Technical Lead

Business Objective

To maintain customer data consistency across ALL TiVo applications at all times to ensure successful customer experience.

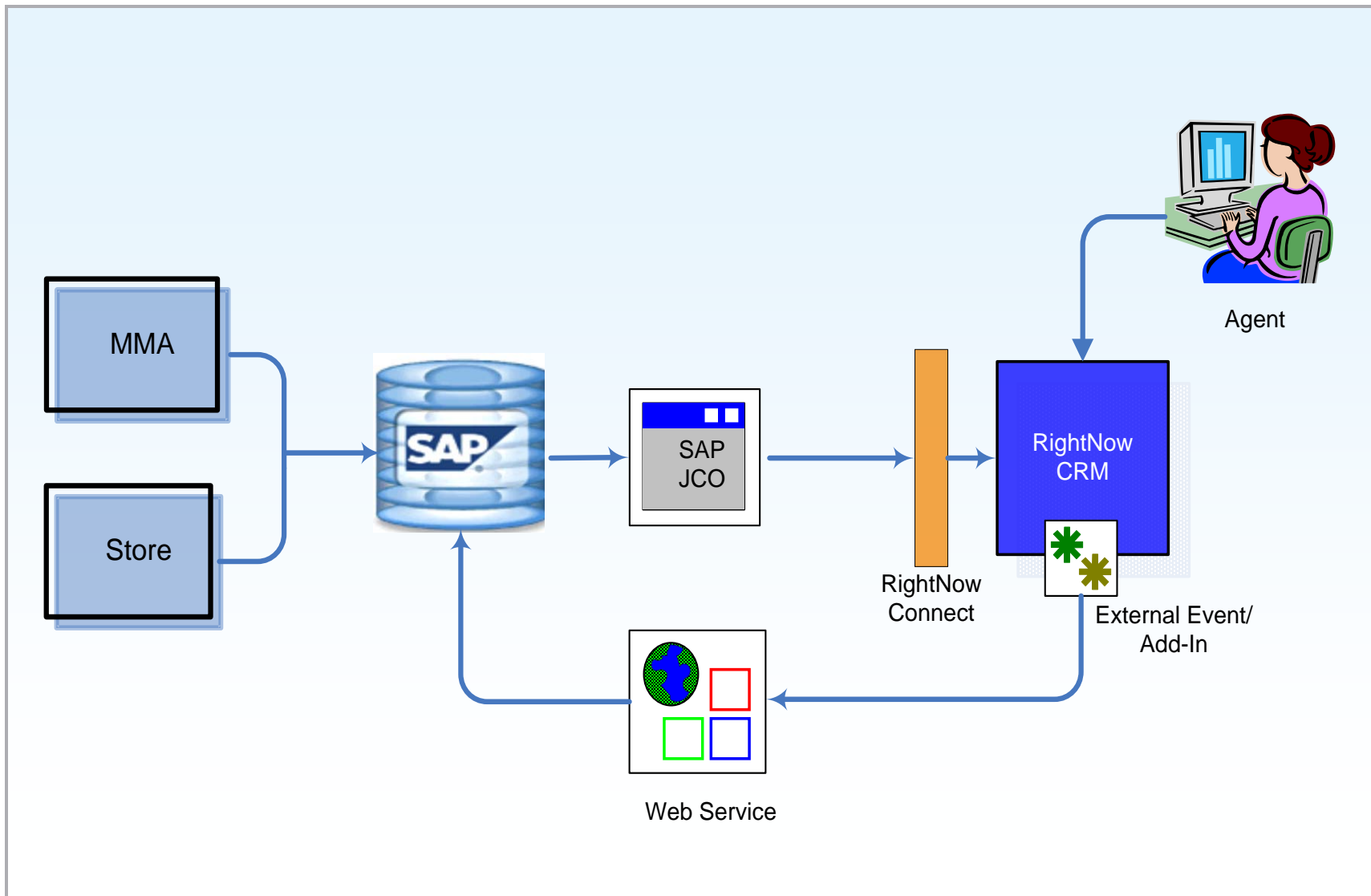


Business Impact

- 3 weeks of development effort from TiVo
- Between 3000-5000 customer records flow between SAP and RightNow CRM per day

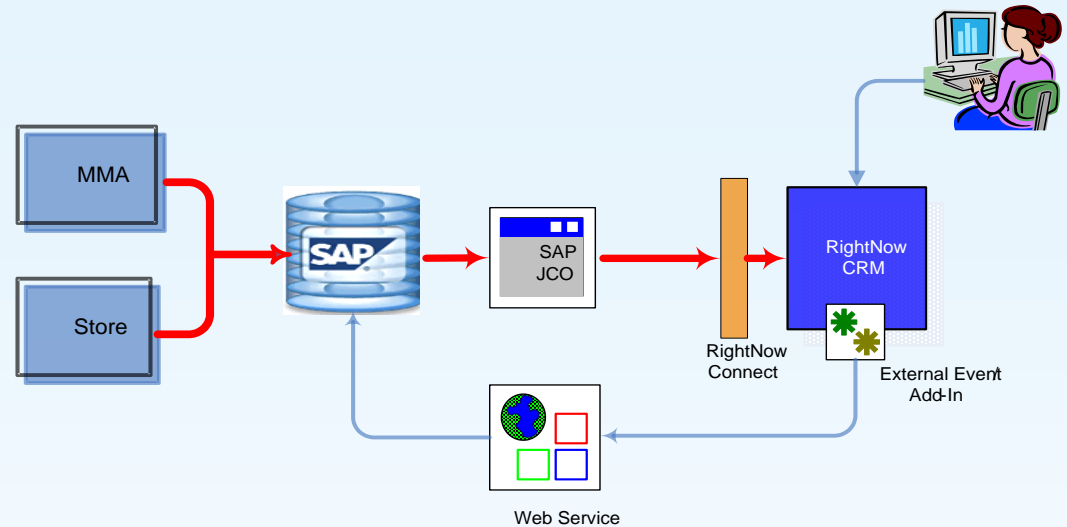


Data Integration Overview



Data Integration Solution

SAP → RightNow

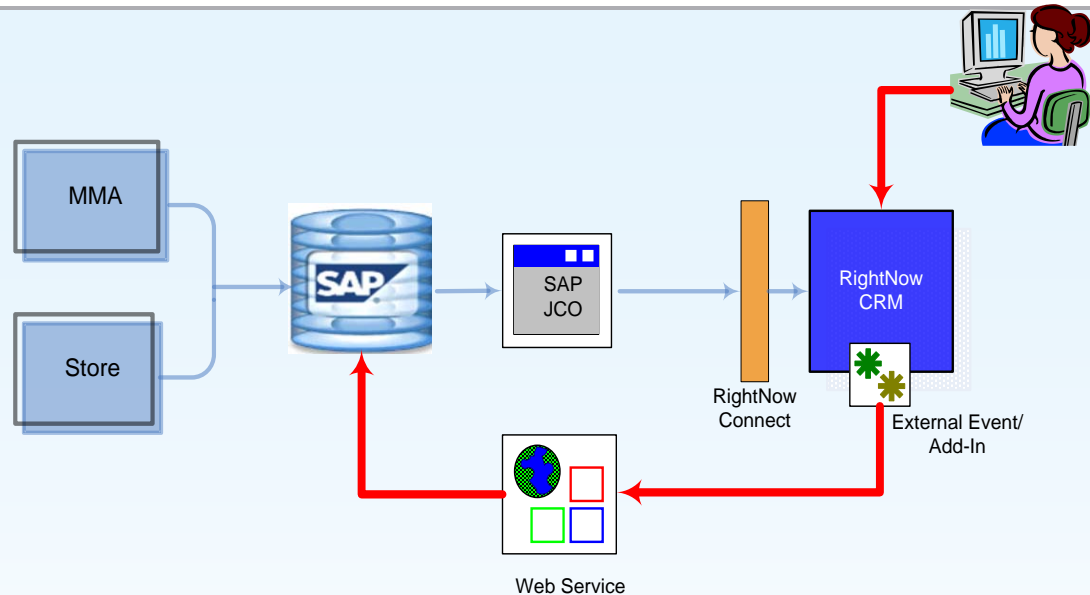


- Utilized SAP Java Connector (SAP JCo)
- SAP Triggers call SAP JCo in real-time whenever a customer data element is changed
- SAP JCo program calls RightNow Connect to:
 - Create, update, delete, and dedupe customers in RightNow CRM
 - Create auto-incidents



Data Integration Solution

RightNow → SAP



- Address validation add-in calls TiVo web service to validate a customer's address in SAP before contact creation and update
- External events call TiVo web service, upon contact update and creation, to update SAP





Wrapping Up

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Conclusion

- ▶ **RightNow Integration APIs**
 - Targeted at the integration taxonomies
- ▶ **Evaluate your integration needs**
 - Integration quadrant
 - Integration taxonomy
- ▶ **Choose your integration technology**
 - Evaluate your requirements & skill set
 - We are hear to help
- ▶ **Leverage TiVo**
- ▶ **Leverage data integration Partners at SUMMIT 09**

Questions

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