

# Case Study - Implementing Integrated ALM for Large California Government Agency



**KOVAIR**

By Kovair Marketing

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## Introduction

A large Agency of the State of California's mission is to procure, manage and deliver technology systems that support the delivery of health and human services to Californians. The Agency was facing challenges in tracking and managing the deliverables from various technology vendors as part of their project management responsibilities. They decided to develop a Vendor and Deliverables Management solution using Kovair's platform capability. Just by using Kovair's drag and drop configuration capabilities they created an effective and sophisticated solution which addressed all of their challenges and pain points in this area.

## Challenges

In Agency's own words: "In 2005, the Agency was established to manage a portfolio of large, complex health and human services information technology projects. It provides project management, oversight, procurement and support services for a multi-billion dollar portfolio of high criticality projects. In this capacity, the Agency coordinates communication, collaboration and decision making among project stakeholders and program-side sponsors of the projects. It manages the procurement, contract negotiations and contract management aspects of the acquisition of technology systems and services. After the procurement phase, the Agency oversees the design, development, governance and implementation of IT systems which serve health and human services programs."

As a project management organization the Agency deals with technology vendors and manages hundreds of deliverables in a timely fashion. Without a proper management tool the Agency was facing the following challenges:

- ❖ Tracking the status of each deliverable
- ❖ Implementing and following a process for review and approval of each deliverable consistently
- ❖ Responding to vendors' claims in the context of a deliverable with traceable evidence
- ❖ Acting on various tasks related to deliverables without a proper "Alert System"
- ❖ Managing who is doing what in the context of each deliverable

## Kovair ALM Studio Solution

Kovair Application Lifecycle Management Solution provides a rich and configurable, global platform for implementing Software Development Life Cycle (SDLC) process, collaborating on the entire development cycle and tracing implementations back to original requirements. It ensures that all the

stakeholders are working on the same source of information, no matter where they are located, and that there are no last minute surprises.

**The main features of Kovair ALM Studio are:**

- ❖ 100% Web based for global access without any client side software.
- ❖ Single data repository catering to all the modules of ALM - Requirements, System Architecture, Design Elements, Tests, Defects and Change Requests
- ❖ Fully configurable by the users through simple mouse clicks without the need of coding
- ❖ Built-in Workflow Process and Policy Engines for reviews and escalations.
- ❖ Document Management and Attachment capabilities for collaborative review and approval of documents.
- ❖ Import facility to facilitate importing artifacts from Microsoft Word documents or Excel spreadsheets.
- ❖ Support for creation of comprehensive real-time Word reports.
- ❖ Excellent Reporting capabilities with Dashboards, Word, Excel and Crystal Reports.
- ❖ SOA based Enterprise Service Bus – the Kovair Omnibus - allowing integration with any best-of-breed third party tool.

## The Solution by Kovair

The Agency had a choice of developing a custom application or buying a commercial off the shelf software (COTS) to address the challenges they were facing in the area of vendor management. However they were already using Kovair for Requirements Management within their group and they were familiar with capabilities of Kovair especially in the area of Process Workflow management. They decided to investigate the possibility of configuring a solution using the application platform capabilities of Kovair.

While configuring these custom solutions, they used a wide range of simple to advanced functionalities of Kovair. Though perfected over time, the first version was created within a four day period which included training and handholding of the end users. It was configured completely by a group of end users representing different stakeholder groups. No IT resource was used for creating this solution as Kovair does not need any coding, scripting, database knowledge or web programming.

#### **Solution Highlights:**

- ❖ Configuration of Entities, Fields and their Relations
- ❖ Customization Views, Filters, and Reports
- ❖ Automation of Process
- ❖ Automation of Policies

## Entities and Relations

As the first step of any solution created in Kovair, the Agency created a set of Entities and various relations between these Entities. The Entities can be thought of as business objects or a table of rows (items) and columns (fields). The relations can be one-to-one, one-to-many or many-to-many between Entities. Following are the major Entities created for this solution:

- ❖ Vendors
- ❖ Requirements
- ❖ Deliverables
- ❖ Deliverable Transmittals
- ❖ Work Products
- ❖ Session Packet Review
- ❖ Change Request
- ❖ Issues (Issues tracking Internal to Agency)
- ❖ Issue Tracking System (Issues Imported from major vendor's Issue Tracking system)
- ❖ Action Items
- ❖ Configured Items
- ❖ Strategies

- ❖ Test

The example relations are:

- ❖ Vendors to Deliverables – One to Many
- ❖ Deliverables to Deliverable Transmittals – One to Many
- ❖ Change Requests to Requirements – Many to Many

## Processes

Kovair One of the most challenging parts of any business solutions is the definition, implementation and enforcement of processes. Success of a business solution depends on the consistent use of tools and enforcement of a process(es) which allows the organization to attain its goals for that business solution. However, it is often seen that even with the best of intentions and good process design, the solution fails since the process was implemented manually. The success of a manual process depends on the discipline of the individuals and their adherence to the process consistently and execution without mistakes. Even for a tightly knit group, it is a tall order; for a distributed team it is almost impossible. The only solution for a successful implementation and enforcement of a process is process workflow automation.

One of the most powerful and useful functionalities of Kovair is its industry-leading process engine, the 'Omniprocess'. Using a drag-and-drop 'Visio like' graphic interface, users can create and automate workflows. The biggest advantage is, once created, the process remains fairly transparent to the end users and each user can focus only on their tasks which are generated by the active process behind the scene. Since no-coding is necessary to create and manage the workflow in Kovair, the overhead is low and an organization can iteratively develop a more perfect process over time without the fear of costly mistakes.

As Kovair allows implementation of multiple processes for different Entities, the Agency decided to create and automate the processes for the following Entities:

- ❖ Action Items
- ❖ Change Request
- ❖ Configured Items
- ❖ Deliverable Transmittals
- ❖ Issues (Issues tracking Internal to Agency)
- ❖ Session Packet Review
- ❖ Test
- ❖ Work Products

## Customizations

Implementation of a business application with various inter-dependent processes needs a number of custom Fields, Views, Filters and Reports. Kovair's user friendly configurability allows users to create all of these just by drag-and-drop browser based interface without any need for database schema changes or coding.

The Agency created various custom fields for each of the Entities using Kovair's rich set of custom field types. Some of these field types are standard like Text, Numeric and Date. But the Agency used some advanced data types which come packed with powerful functionality.

For example:

- ❖ **Calculated Field:** the field contains Excel like formula incorporating values of other fields including other calculated fields.
- ❖ **Rich Text:** The rich text field allows highly formatted text including fonts, color, table, bullets, numbering and embedded images.
- ❖ **Grid Field:** This allows one to embed a table with predefined columns of various data types and as many rows in a single item. This is typically used when the number of detail items cannot be determined at the design time.

The Agency also created various forms for each Entity with layouts consisting of different custom fields for various groups of users. Kovair's ability to create various simple forms for various groups of users allows users to see only the information relevant to them, hiding all the complexity for others. For each of the Entities, the Agency created various reports using Kovair's support of Crystal reports and Microsoft Word Report feature. The Agency even created custom Crystal Reports by using Crystal designer and accessing a read-only de-normalized view of the Kovair database tables.

## Policies

Kovair has built-in business rules automation functionality called 'Policy engine'. Agency's Vendor Management solution uses this feature extensively to automate various actions which are triggered by different events. Kovair's policy is also used for sending Notification emails to various stakeholders based on different events and conditions.

Some examples of Policies implemented by the Agency:

- ❖ When Deliverable Transmittal 'Letter Sent Date' is populated, update the "Letter Sent Date – V2". The V2 date is used to print the date only on letters.
- ❖ Restart Session Packet Review process if session packet is already stopped and the review status is "Resubmitted".

Combination of Process and Policy gives Kovair a powerful automation capability which can make implementation of a business solution easy and flawless.

## Benefits

By configuring a Vendor and Deliverable Management solution using Kovair's platform capability, instead of developing one in-house or buying a COTS solution, the Agency saved a substantial amount of money. Typically the solution they created in four days would require at least several man-months or longer if they developed one in-house with all the features they obtained from Kovair. Alternatively a COTS solution, if at all available with the advanced features and functionality they implemented using Kovair, would cost them tens of thousands of dollars, if not more.

Vendor and Deliverable management solution the Agency created using Kovair allows her to receive the following benefits:

- ❖ Tracking the status of each Vendor's Deliverables using the Kovair's process capability. Since Kovair's process creates the task for the right person at the right time and sends notification mails, participants need not constantly track and watch the deliverables manually and hence be in a reactive rather than proactive mode. This reduces the overall organizational uncertainty level and increases productivity.
- ❖ Due to the two powerful automation engines of Kovair's Process and Policy, no items or issues fall through the cracks. The System automatically takes care of all the housekeeping and overhead tasks and doesn't depend on the discipline of individual participants.
- ❖ By implementing and following a process for review and approval of each deliverable consistently, the predictability of the deliverables enhanced considerably.
- ❖ Having a detail audit trail of every change at every step of the process allows the Agency to respond to vendors queries and claims in the context of a deliverable with high level of reliability and certainty.
- ❖ Kovair's flexible task management system allows the Agency to manage who is doing what in the context of various moving parts of the organization. Being an open and transparent system, every person knows where and why a particular process is held up and what needs to be done to move it.
- ❖ The Agency improved its efficiency and productivity in processing the deliverables considerably, both in terms of cycle time and the manpower effort. Previously the same set of tasks done by four persons manually could be done by about two persons with automated process. Also 5 average transmittals needed for each deliverable with manual process, is reduced to 2 with automation.
- ❖ The process improved vendor timeliness due to the improvements in Agency's metrics on timeliness. The Agency can share with vendors their records on timeliness which make the vendors more prompt.
- ❖ Overall reduction in errors and omissions due to the workflow tasks were at least 10%.

- ❖ The workflow process automation reduced time required to monitor and supervise other users.
- ❖ Today Kovair based Vendor and Deliverable Management solution is a critical piece of business application used on a daily basis at the Agency.

## Conclusion

With the success of the Vendor and Deliverable Management solution using Kovair platform, the Agency is looking at other related business areas which can be implemented and automated using Kovair platform. Other groups within the Agency are also interested in implementing Kovair for their business application needs after learning about the Vendor and Deliverable Management solution. The Agency is also investigating the chance of integrating their solution with some of the development tools their vendors use including Caliber RM for Requirements Management. Kovair's Omnibus integration technology allows an Enterprise Service Bus (ESB) based integration with various third party vendor tools as well as organization's own internal applications.

# About Kovair

**Kovair Software** is a Silicon Valley based software product company specializing in the domain of Integrated Application Lifecycle Management (ALM) solutions and supports global software development and management. Kovair's focus on integrating third party best-of-breed ALM tools enables creation of applications in a synchronized tools environment.

Kovair has partnered with leading technology brands like Microsoft, IBM, CA, BMC and more to provide customers a wide range of integration solutions.

**Product Portfolio:** Kovair's flagship products **Omnibus Integration Platform**, **ALM Studio**, **QuickSync** and **Integrated Test Management** are highly preferred solutions by some of the major corporations globally.

**Recognitions:** The **SD Times 100** has recognized Kovair as one of the top 100 software innovators in the domain of Application Lifecycle Management. Kovair's Innovations in ALM Tools and ALM Integrations are well recognized both in the industry and by analysts at places like **Gartner** and **Forrester**.

**Business Focus:** Application Lifecycle Management Products and Services, Integration Platform

**Industry Verticals:** IT Consulting and Services, Banking and Financial Services, Telecom, Manufacturing, Networking, Healthcare, Defense and Government.

**Contact:** For more information about product and services contact [sales@kovair.com](mailto:sales@kovair.com). You may follow Kovair updates on [Facebook](#), [LinkedIn](#), [Twitter](#), [Google+](#), [Slideshare](#) and [YouTube](#).

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