ATLASSIAN

Balancing multiple ITSM systems

Using Jira Service Management in tandem with other ITSM systems

FOREWORD

We all feel it; our tech landscape is advancing, and fast. Low-code/no-code AI, ChatGPT, and hyper-automation are **changing the way we work**, while businesses are re-assessing budgets in response to **economic uncertainty**. The pace of change is constant, exhilarating, and relentless.

In response, IT leaders are rethinking their approach to work, and the ITSM systems that make it possible. These disruptive changes are forcing companies to think of new and creative ways to enable their teams while meeting the needs of the business. They're looking for ways to work even more efficiently, and more cost-effectively. For some, this means taking a new approach to their ITSM systems: integrating their existing system with Jira Service Management to reduce license costs, while also increasing automation, creating connectivity between critical applications, and maintaining consistent services for better employee productivity.

That's why we've created this whitepaper, which outlines Atlassian's approach to integrating Jira Service Management with other ITSM systems. In this handbook, you'll learn why some IT leaders choose to integrate Jira Service Management with other ITSM tools, and the outcomes they see. You'll also find detailed examples of what successful integration can look like for you and your team.

Whether you decide to embark on an integration journey now or in the future, this handbook will give you the guideposts and implementation options you need to guide your plans.

Adapting to change: Embracing lean innovation for IT

Blurring pace of technological change combined with global market turmoil

Many IT leaders are experiencing accelerated, and in some cases, turbulent business conditions. Their companies have tremendous opportunities for digital transformation, but economic challenges and concerns about initiative success are hampering new program investments. And the concerns are substantial. Deloitte reported that **85% of CEOs** who accelerated digital initiatives during the COVID-19 pandemic have subsequently struggled to translate this into strategy. However, executives also know that avoiding digital transformation leads to stagnation and further business decline.

Although **economic headwinds are strong**, many organizations are **continuing to invest** in strategic technology projects that support digital transformation efforts. Like experienced whitewater rafting guides, business leaders understand that to get stability, you must move as fast or faster than the current.

Keeping up with innovation when budgets are tight

Industry experts recommend that companies continue their digital transformation journey by starting small and focusing on projects that deliver meaningful, short-term business value. Rather than trying to build large-scale systems in fast-changing environments, teams should start small, iterate, and learn fast through the process. Success will lead to more success and greater organizational buy-in.

Additionally, business leaders indicate that CIOs must continue to "do more with less" and find ways to help the existing workforce be more productive by removing wasteful processes and automating repetitive, low-level tasks in their mixed, distributed environments.

What's a mixed environment?

Many companies, particularly at the enterprise level, are working with architecture that's a highly customized combination of purchased and built-to-spec apps. In a mixed environment, ensuring a frictionless user experience can be a challenge. Having more applications in your architecture creates more opportunities for friction to disrupt the consumer experience.

Another key factor in achieving a digital-first environment is breaking down data silos. A **recent survey** indicated that 90% of IT leaders say data silos are an obstacle to digital transformation. Most organizations want to be more data-driven in their decision-making, but the ones that succeed are those in which leaders commit to changing their mindset to break down silos and emphasize collaboration.

And finally, some experts recommend that companies "go back to the basics" in their digital transformation efforts and focus on seemingly mature practices (particularly, IT service management, or ITSM). Because ITSM is a strategic approach to IT with a focus on delivering value to customers, it is a corporate linchpin for increased efficiency, lower costs, and improved end user satisfaction. To operate efficiently under pressure, organizations should:

- Start small and iterate to prove success and value
- Work with existing systems
- Break down data silos
- Address basic processes that impact the business

Benefits of ITSM

ITSM is the bridge that connects IT professionals within an organization to the end users who need IT services. Through these connections, ITSM practices provide a number of benefits:

Business	• Quickly adapt to changes and innovation • Clearly defined workflows, leading to improved efficiency and cost savings • Quickly respond to incidents, reducing the associated cost and disruption • Ensure compliance tracking for regulatory requirements
End user	• 24/7 IT support to perform better and do more – with clearer understanding of available IT services and how to use them correctly • Access relevant information and make support requests from any device, at any time, from anywhere in the world • Teams can understand who is responsible for what tasks and are more accountable and informed
IT	• Align goals backed by reliable services, ensuring more gets done (with fewer problems) • IT is delivered as a service with the needs of the user as the primary focus • More efficient processes, allowing organizations to handle more IT development without reducing quality • Better visibility so organizations can incidents before they become issues • IT teams share information and integrate services with non-IT teams to provide more robust solutions

Developing an ITSM integration strategy

Business case for ITSM system integration

Many Jira Service Management customers have achieved significant business process improvements when they integrate their ITSM system with other systems. ITSM system integration helps un-silo enterprise and customer data, granting ITSM professionals a comprehensive view of the right information.

Forrester Consulting states that:

"Jira Service Management's connection to Jira Software and enterprise management practices increases visibility into risks, problems, hardware, and software across the organization, as well as improves collaboration between development and IT operations teams. With increased visibility and collaboration, teams make better decisions and minimize risk." [1]

In a modern business environment, aligning services, applications, and data is crucial in meeting customers' needs. In order to provide seamless and consistent services, an organization's ITSM applications must be connected. This interconnectivity enables secure data transfers between systems, facilitates inter-application workflows, and simplifies cross-organization communications.

Additionally, strong ITSM integration alleviates the need for actions like manual data entry. Duplicate processes associated with keeping applications up to date can be avoided, by enabling real-time updates across services.

The business impact of Jira Service Management

According to Forrester Consulting's **Total Economic Impact™ report** enterprises that replace their existing ITSM systems with Jira Service Management realize the following three-year financial impact:

277%
ROI

155hrs
recovered per month for IT operations teams

$1.4M
improvement in service desk productivity

$2.0M
saved by switching from a traditional ITSM product

1 Forrester Research, Inc. *The Total Economic Impact™ of Atlassian Jira Service Management* Published December 2022.

Key benefits of ITSM system integration

ITSM integration helps streamline an often complex, disjointed technology stack. This type of integration provides value by reducing information silos, enabling automation, improving services for the customer, and providing more accurate, readily accessible data. This yields benefits like:

- **Increased automation:** By reducing the need for manual data entry, organizations save time and are able to expend their resources on more value-adding activities. This also mitigates the potential for human error and the associated financial and reputation costs.
- **A single source of truth:** Greater interconnectivity between critical applications helps foster consistency across the organization's IT ecosystem. This ensures applications are synchronized and the right data is readily available – not tied up in informational silos.
- **Consistent services:** By ensuring the right data is available when needed, organizations can greatly improve employee productivity. It also grants organizations greater confidence that service standards won't be undermined by poor data quality.

Integration considerations

The right integration approach will depend on the job at hand; there isn't a single integration approach that will suit all requirements. Below are the considerations that you should think about before deciding on the right approach for your specific need.

Consideration	How to evaluate
Performance	***What systems will be integrated and will their performance be impacted by the integration?*** Many non-native integration solutions leverage web services to function. Often, these web services share bandwidth with the ITSM solution, meaning integrations can have an impact on query speed. Organizations should evaluate their future scalability requirements and consider solutions that can execute the estimated data exchanges each day without impacting system performance.
Time	***How time-sensitive is the data?*** Organizations can often alleviate the performance impact of non-native integrations by executing integrations as batch jobs out of business hours. However, batch exports can exceed the allotted time and lead to disruption for the end-user. For these cases, organizations may want to consider using native applications for integrations that can leverage real-time data-delivery.
Volume	***How much data is involved?*** If the data set is relatively small, in-house resources may have the time and expertise to implement an effective integration. Large amounts of data and data sources can make the data management processes complex to manage, so an integration partner and/or a managed service may be a cost-effective solution.
Distribution	***How does this data need to be distributed?*** *Is it a one-way transfer, or a bidirectional synchronization?* Is it a point-to-point integration, or are there multiple destinations? Consider an implementation and integration that provides the best business value.

Resilience	***How business-critical is the integration?*** *Is it something that should be monitored to ensure it's available?* If your environment requires high-level availability for the system integration, a managed service provider may be a viable option.
Authorization	***Where are the integration points located?*** *Are all systems on-premise? Cloud-based?* Or is one system located inside the corporate network and the other system hosted outside the DMZ? Authorization requirements will be dependent on where the integration points are located, and your organization security policies. If all the integration functions are cloud-based and provided by a third-party vendor and/or a management service provider, OAuth 2.0 protocol may be sufficient. In a mixed IT environment, additional security processes may be required.
Overall cost	***What's the total cost of ownership?*** An obvious consideration, but one that is often calculated inaccurately. Ensure that you are looking at the total cost of ownership, as opposed to just the license cost. Factor in development time, testing time, regular maintenance for upgrades and process changes, additional hardware and software requirements, and so on.

ITSM integrations and business partners

With the right integration strategy, Jira Service Management customers have achieved substantial business results. Below we describe different use cases where adding an ITSM integration can decrease workload, increase productivity, and improve ROI.

1. **Integrating internal teams using different ITSM tools**

   Many organizations have more than one ITSM tool. While it's not an ideal scenario, it's sometimes necessary, since different ITSM providers might serve different needs. Through integration, organizations can connect their ITSM tools and ensure incident, service request, CI data and more are synchronized between departments and systems.

2. **Enabling DevOps and ITSM teams through seamless workflows**

   System integrations can ensure that work flows uninterrupted between an organization's ITSM and development systems, and maintain synchronization between the two. This helps both the ITSM user and development user, by enabling them to operate within the systems they are most familiar with. The synchronization also reduces the need for work to be replicated.

3. **Connecting external service providers to internal workflows**

   With a strong integration strategy, organizations can assign tickets from service providers to their internal teams using the same business processes and rules. That continuity makes sure all relevant information is captured when creating and sharing tickets. The system integration also provides the relevant departments with real-time visibility into how tickets are progressing.

4. **Linking HR and IT organizations**

   By integrating human capital management (HCM) and ITSM systems, both HR and IT organizations can streamline their processes and operations. Onboarding and off-boarding tasks can be automated and employee experience and productivity can be improved. Today's employees expect a consumer-grade experience that supports not only the rapid provisioning of critical supplies at the beginning of the employment experience, but also one that supports them at every step of the journey there afterward. Integrating HCM and ITSM systems improves cost efficiency and reduces manual tasks.

5 Connecting CSM and ITSM systems

Customer Service Management (CSM) and ITSM systems are designed to help enterprises deliver better internal and external customer service and support. Integrating the systems allows organizations to better connect their customer service and IT services teams. With this integration, IT users can create service request, incident, problem, and change records from customer service cases. Records can be passed between systems along with any attachments, journal fields, and more. Both CSM and ITSM systems can be synchronized to ensure consistency and keep all teams in the loop.

Integrating your ITSM tools

Integration partners deep-dive

Atlassian has partnered with a number of companies to provide integration tools and professional services to modernize your ITSM capabilities, and optimize the use of IT resources.

Want to learn more?

To learn more about how customers are powering innovation with Atlassian partners, visit the **Atlassian partners page**.

In the next section, we outline the approach that two Atlassian partners used to integrate Jira Service Management with a third-party ITSM system to provide a comprehensive solution for their customer's ITSM needs.

Deep-dive: ZigiWave for ITSM integration

ZigiWave is a software development company that challenges the traditional integrations industry, where connections between apps require lines of code and a lot of time. Their product, ZigiOps, empowers non-technical users to integrate systems in a few clicks, without any additional scripts.

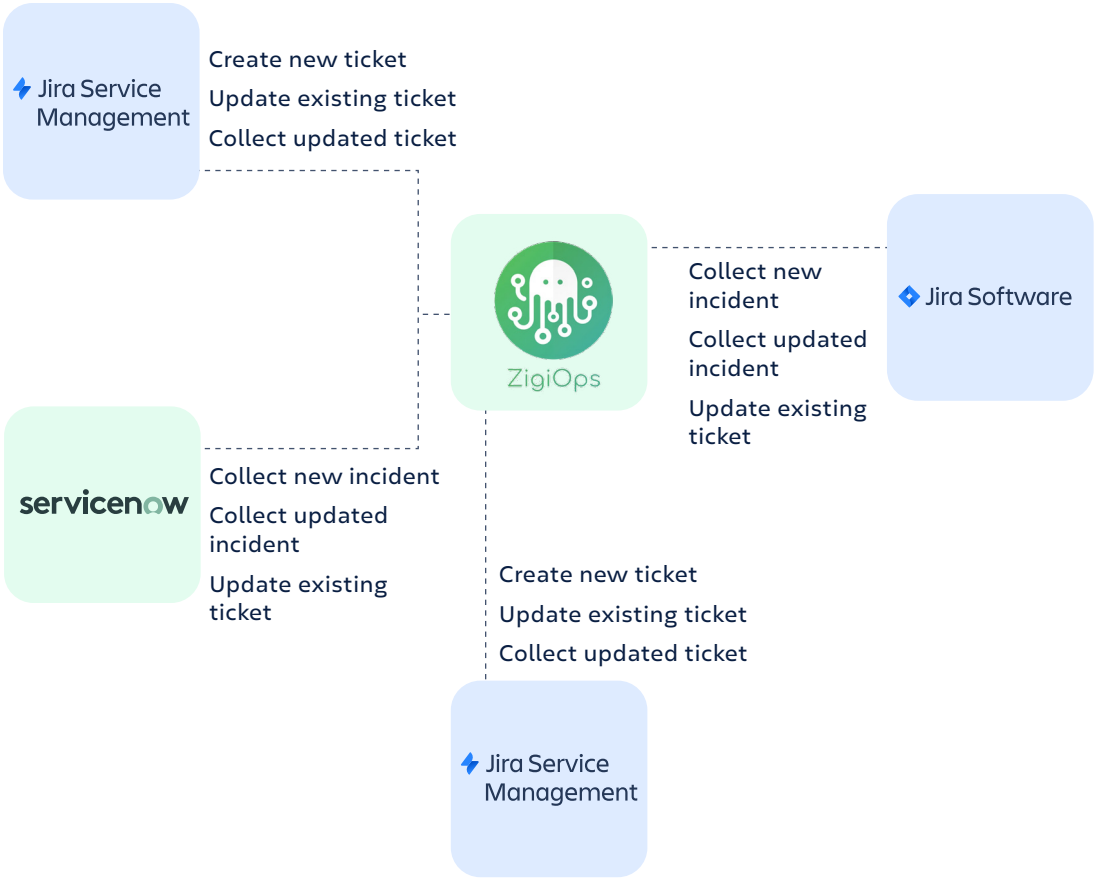
Overview: ZigiOps integration platform features

- **No-code integrations** Integrate systems in a few clicks without any code or additional scripts. Synchronize all related and custom fields.
- **Advanced data mappings** Sync all related and custom fields. Transfer comments, attachments, and more. Customize the integration per your needs.
- **Unlimited scalability** Transfer as many queries as you need between your source and target systems. Create new integrations in minutes and change the existing ones easily.
- **Single source** ZigiOps is a standalone integration platform that connects with systems via APIs. You do not need to change anything within your instances to connect them.
- **Integration templates** Find your integration use case in our library with predefined templates. Load the template and adjust it to fit your needs.
- **Enterprise-grade security** ZigiOps was built by following security best practices. The integration tool doesn't have a database and therefore cannot store any information.

Use case background

ZigiWave's client is a software vendor who wants to receive product issue and defect information from their external customers. The external customers track operations issues in their respective ServiceNow systems. When a customer experiences a software operations issue, they create an incident in their system. Then, a record is sent to the software company's service desk, who uses Jira Service Management.

If the service desk is unable to resolve the customer's incident, an issue is created for the appropriate engineering team who uses Jira Software. The engineering team works on the issue, and their updates flow back to the service desk and the external customer's system.



The software vendor contacted ZigiWave, and the ZigiOps presales team went to work. During the initial project phase, the technical presales team met with stakeholders representing each of the systems to discuss and document the following information using ZigiWave's use case requirements template:

- Permissions and procedures for connecting the systems
- Record types (e.g. service request, incident, or change requests) and workflows to be included in the integration
- Fields to be synchronized (e.g. comments, attachments, or custom fields)
- Integration type (unidirectional or bi-directional)
- Integration correlation approach (fields used to identify unique identifiers in each system)

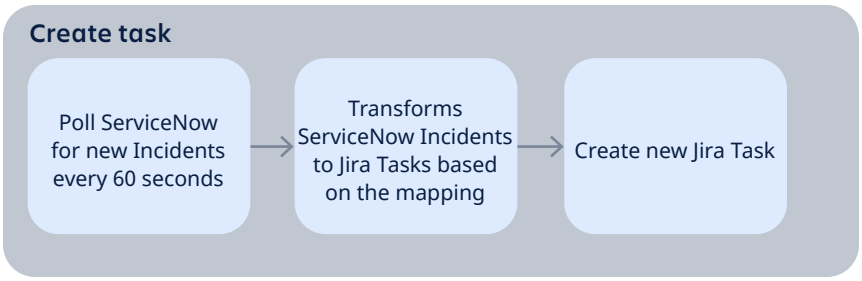
A closer look: ZigiOps integration platform

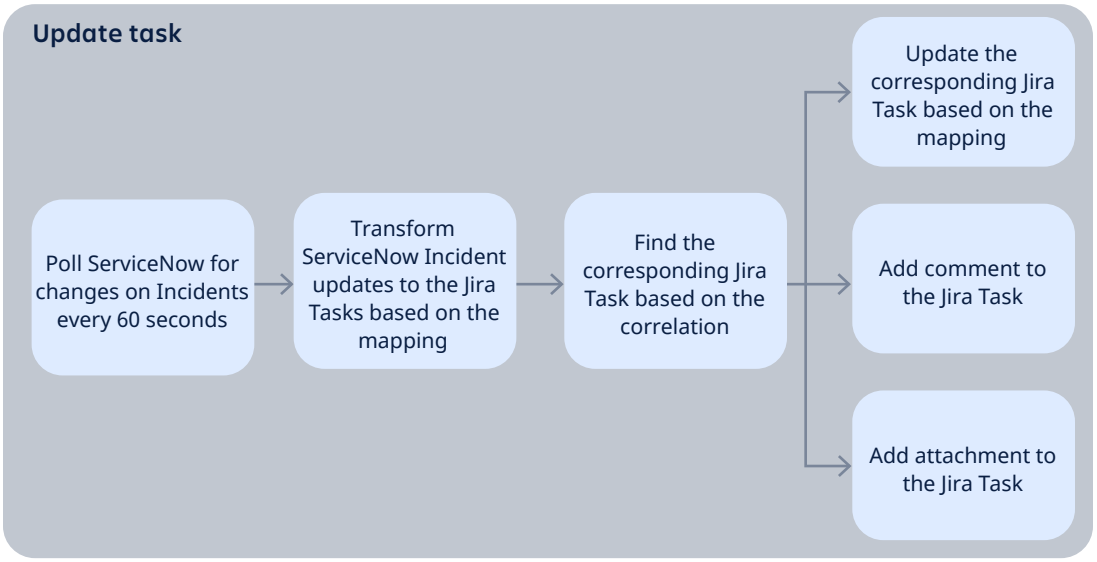
ZigiOps acts as middleware between systems. It uses system APIs to connect to them. The authentication process is simple: you need the permissions (based on the data you want to transfer) and the Jira instance URL/password. Once you successfully establish the connection, ZigiOps will load the system schema. ZigiOps reads the schema dynamically so in case there is an update in a system, it will automatically extract the new schema.

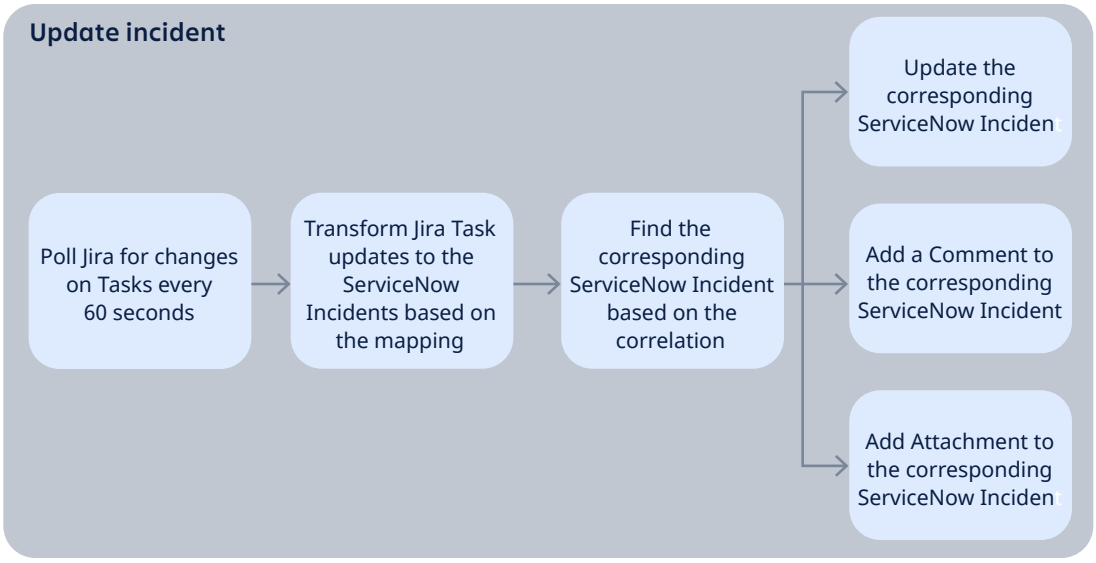
In rare cases, it will show an error in the mapping section if there is a data mismatch. Additionally, ZigiOps does not store any transactional data; rather, it writes to a log file for troubleshooting transactions. ZigiOps extracts data from the source system's tables (Jira Service Management, Jira Software, ServiceNow, etc. accordingly), transforms and sends the data to the target system. ZigiOps performs updates and back-syncs, which are basically done the same way, using the correlation logic.

The following Jira permissions are generally included in a ZigiOps integration:

- Add comments
- Assign issues
- Browse projects
- Create attachments
- Create issues
- Edit issues
- Resolve issues


Create task
Poll ServiceNow for new Incidents every 60 seconds
Transforms ServiceNow Incidents to Jira Tasks based on the mapping
Create new Jira Task


Update task
Poll ServiceNow for changes on Incidents every 60 seconds
Transform ServiceNow Incident updates to the Jira Tasks based on the mapping
Find the corresponding Jira Task based on the correlation
Update the corresponding Jira Task based on the mapping
Add comment to the Jira Task
Add attachment to the Jira Task


Update incident
Poll Jira for changes on Tasks every 60 seconds
Transform Jira Task updates to the ServiceNow Incidents based on the mapping
Find the corresponding ServiceNow Incident based on the correlation
Update the corresponding ServiceNow Incident
Add a Comment to the corresponding ServiceNow Incident
Add Attachment to the corresponding ServiceNow Incident

After the pre-sales team gathered the needed integration requirements, they started the proof-of-concept (POC) work. The team established connectivity between the software vendor's and their customer's development environments using ZigiOps. When connectivity was established, ZigiOps automatically downloaded schema data from each ITSM system.

> A schema is a collection of all tables, fields, and entities supported by the system.

The ZigiWave team then built an integration template using ZigiOps menu-based user interface and the extracted schema data as predefined values. The POC work was an iterative process. After the initial functionality was implemented ZigiWave had 2-3 working sessions with the stakeholders to ensure the functionality was correct. The POC work was straightforward and quick; for this integration implementation, the work was approximately one month.

Integration details

When an external customer creates an incident in ServiceNow, ZigiOps filters the incident by reporter name, assignee, and organization. All incidents that match the conditions in the integration template are replicated to Jira Service Management, and the software vendor service desk team is set as the assigned group in the new record according to the template data mapping. ZigiOps also includes the following data elements in the integration:

- Support team
- Customer email
- Comments
- Description
- Attachments

Based on the service desk's procedures, an agent is assigned to the incident. The agent reviews the incident and, if possible, resolves it. If the agent is unable to resolve the incident, the agent adds a label ('for development') to the record. ZigiOps detects the target label data and creates a related issue in Jira Software and includes the appropriate engineering team as the assigned group.

The engineering team works on the issue, updates the record to a bug or new enhancement (if needed), and includes notes regarding their progress. Based on conditions in ZigiOps integration template, issue updates are replicated to the associated incident for the vendor service desk in Jira Service Management then to the external customer in ServiceNow.

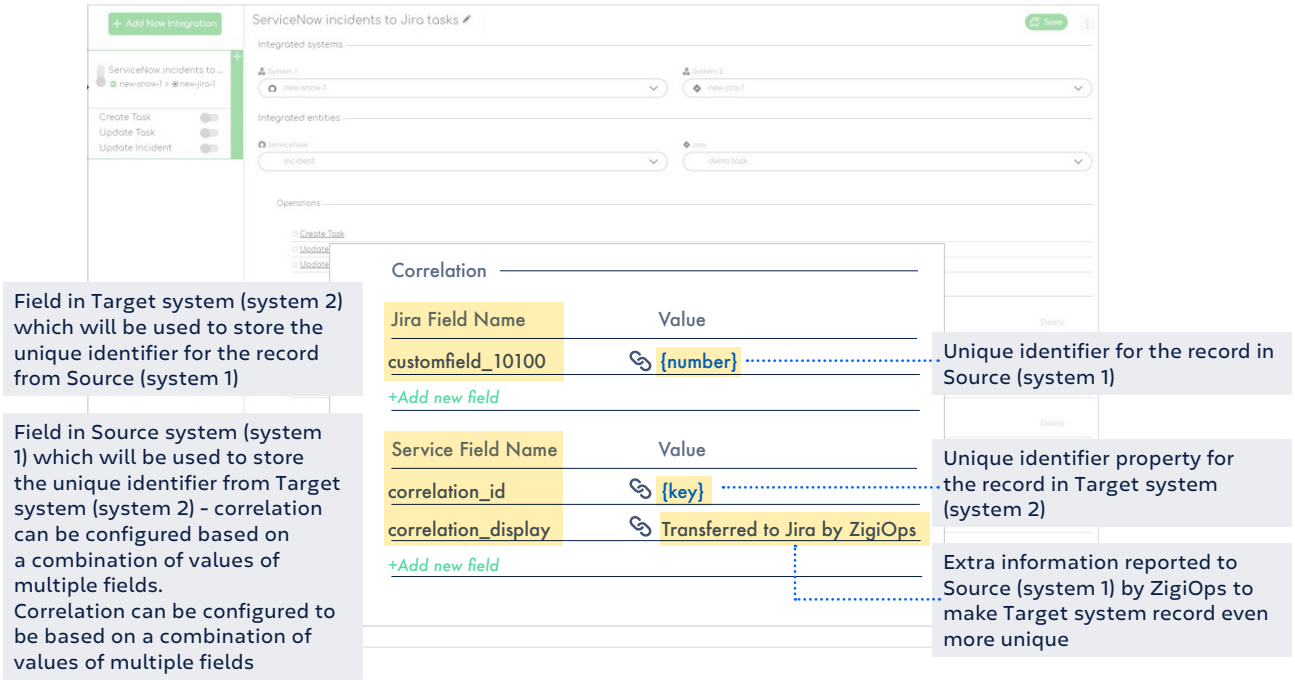
For detailed integration use case information, including system requirements, permissions, authentication, and more, check out these resources:

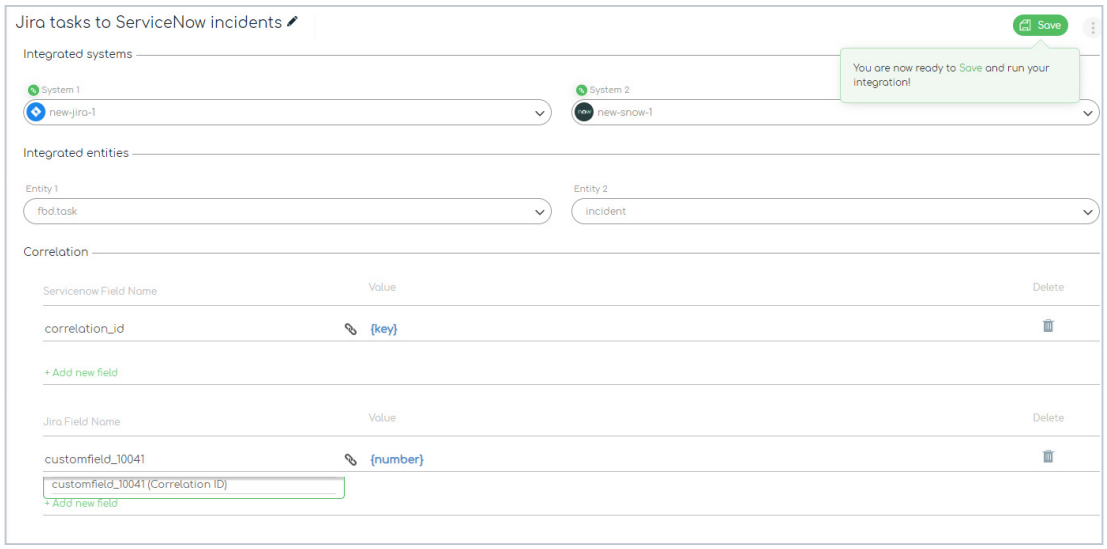
- **ServiceNow incidents to Jira tasks**
- **Jira tasks to ServiceNow incidents**

Integration deployment

When the POC integration implementation was complete and received signoff from the external customer and software vendor stakeholders, the integration templates were cloned then deployed to ZigiOps production environment. The ZigiOps presales team participated in production deployment and ensured the functionality is working as expected.

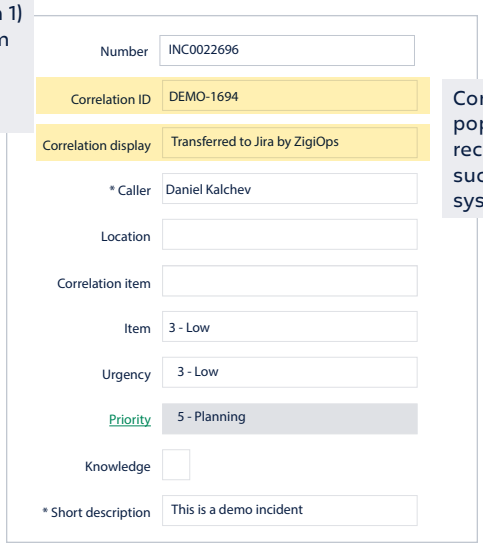
After the integration was stabilized, issues were submitted to ZigiWave for follow-up through their portal for integration consultants to address and resolve.





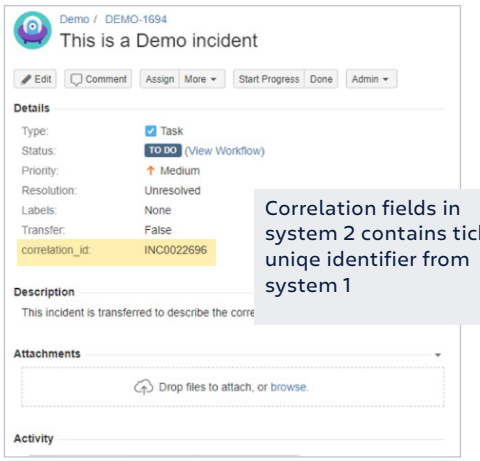
As the integrated systems evolve, ZigiWave provides continued support and stays compliant with the latest versions of their partner's versions (e.g. Jira v9). Customers also have access to the integration templates through the ZigiOps UI to make updates to conditions or data mappings.

Ticket in Source system (system 1) before transfer to Target system (system 2) - correlation fields have no value & no relationship to record in system 2



Correlation fields are populated with system 2 record unique identifiers after successful ticket creation from system 1 to system 2

After initial transfer has been completed successfully any updates in system 1 for ticket “INC0022696” will be transferred to system 2 ticket “DEMO-1694” and any updates from system 2 for ticket “DEMO-1694” will be transferred to system 1 ticket “INC0022696”



Correlation fields in system 2 contains ticket uniqe identifier from system 1

Solution benefits

The ZigiOps integration provides the following process improvements for the software vendor and their customers:

- Automatic data exchange for incidents between Jira Service Management and ServiceNow
- Real-time, bi-directional data transfer and update synchronization
- Related records synchronization (lifecycle and regular fields, comments, and attachments)
- Full visibility into recurring problems of the IT infrastructure

Deep-dive: Empyra for ITSM integration

Empyra is a full-service software products and services company. They are an ISO 27001:2013 certified organization with over 25 years of experience in software development and IT solutions.

Empyra builds apps that are available for Atlassian customers through the Atlassian Marketplace, as well as custom apps that provide solutions for niche customer pain points. Empyra specializes in creating meaningful relationships with their customers, and providing targeted, cost-effective solutions that optimize business processes and create lasting value.

Overview: Empyra's ServiceNow connector for Jira Cloud and Jira Data Center 7.0.0 - 9.6.0

Many companies use ServiceNow and Jira within different teams for different purposes; often the engineering and product teams use Jira Software and Jira Service Management, while the customer support and operations teams use ServiceNow. The Emprya ServiceNow Connector for Jira Cloud and Jira Data Center app is designed to bring these unconnected systems together. This app allows for seamless bi-directional sync between ServiceNow incidents and Jira Service Management incidents.

If a user creates an issue in Jira Service Management then, the app creates an incident in ServiceNow. The app synchronizes all values from Jira Service Management to ServiceNow incident based on field mappings, including:

- Component
- Reporter
- Assignee
- Comments
- Attachments
- Custom fields

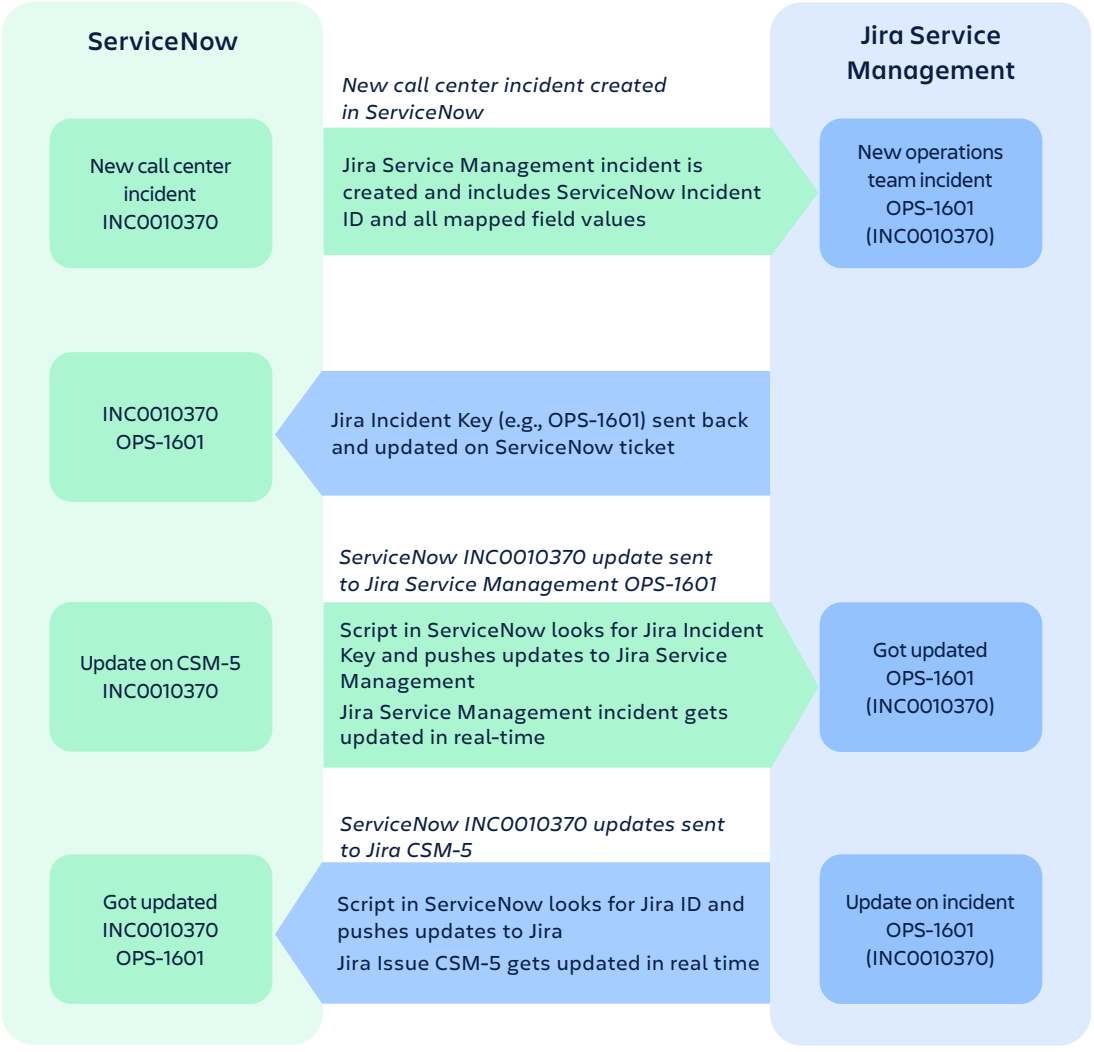
If a user updates an incident in ServiceNow, the app transfers the values to the Jira incident. The app displays a link for the Jira incident key on the ServiceNow records and the ServiceNow incident number on the Jira Service Management record. Users can easily track changes between two different systems in an audit log.

Use case background

Emprya implemented this integration project for one of their existing customers, an equipment manufacturer; Empyra had previously migrated their customer's engineering teams to Jira Software from HP Application Lifecycle Management application.

In this project, Empryra integrated the operations team's ITSM system, Jira Service Management, with the call center incident tracking system, ServiceNow. When the call center received an incident that they were unable to resolve, the record was assigned to the operations team and an incident record was created in Jira Service Management for the appropriate team.

Mapping defined between Jira Project, Issue type, and ServiceNow Incident fields



The company implemented the integration for two primary reasons:

1. The operations team liked working with Jira Service Management, appreciated the system's flexibility, and relied on Opsgenie capabilities.
2. The customer saw the integration of the ITSM systems as an opportunity to save money on license costs. The integration allowed the call center and operation teams to work within their processes and systems while ensuring valuable data flowed seamlessly between the organizations.

During the initial customer meeting, the Empyra consulting team reviewed the business and technical requirements with key stakeholders and documented the following details in their integration template:

- Integration type (e.g., real-time versus batch jobs)
- Volume of data transferred
- Any system customizations
- Modules to be integrated
- Size and number of attachments
- Advantages of authorization approach
- Approval processes within Jira Service Management or ServiceNow
- User groups between the systems

After documenting the customer's requirements, the Empyra team met with the customer to ensure all functionality is captured, then provided a proposal for the scoped work.

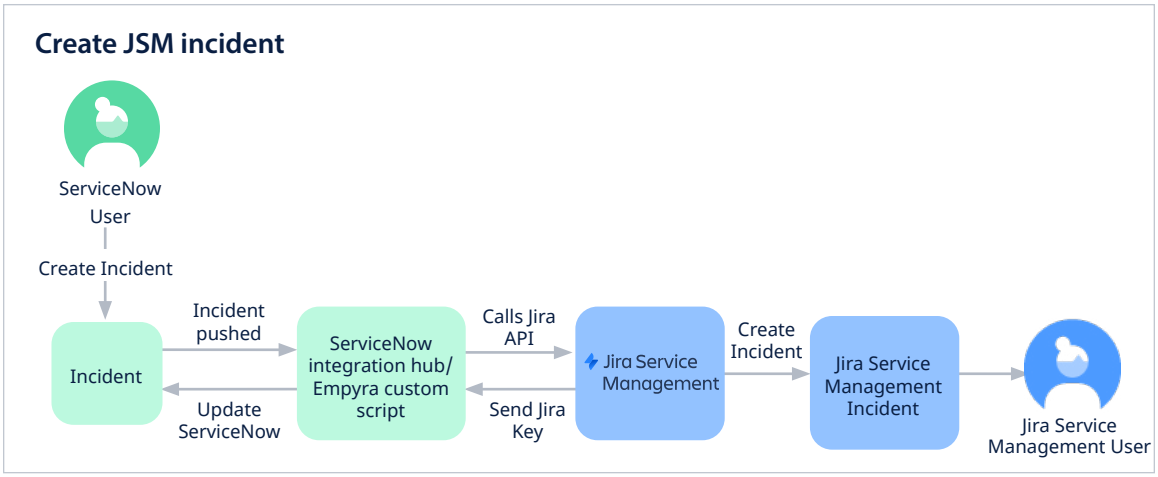
Emprya used an Agile approach for this project implementation which included customer meetings on Tuesday-Thursday cadence. The Empyra team demoed their code during Tuesday meetings, then customers tested the functionality and provided feedback during Thursday meetings.

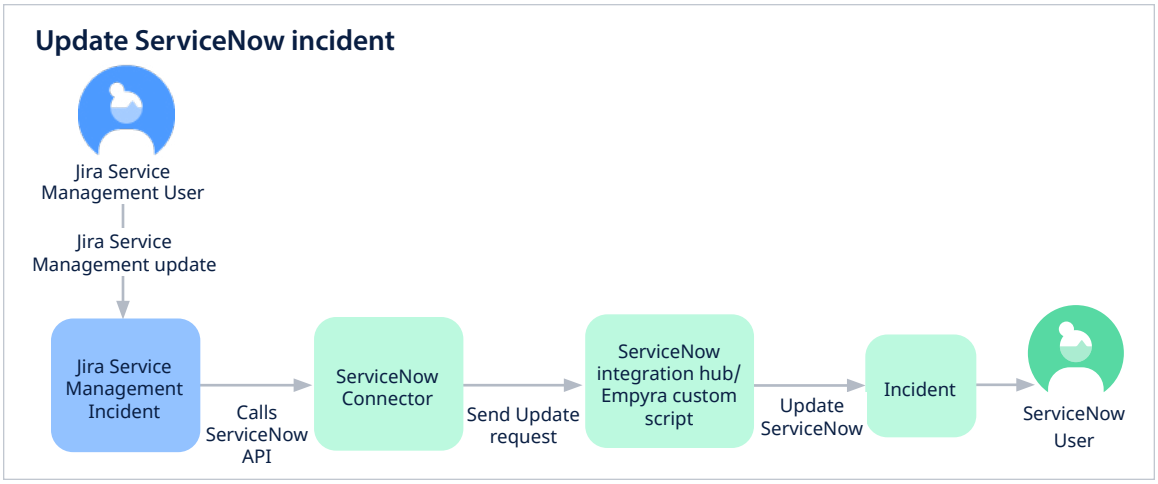
Integration details

This integration included a mapping definition between a Jira Project and the ServiceNow incident module and the following fields:

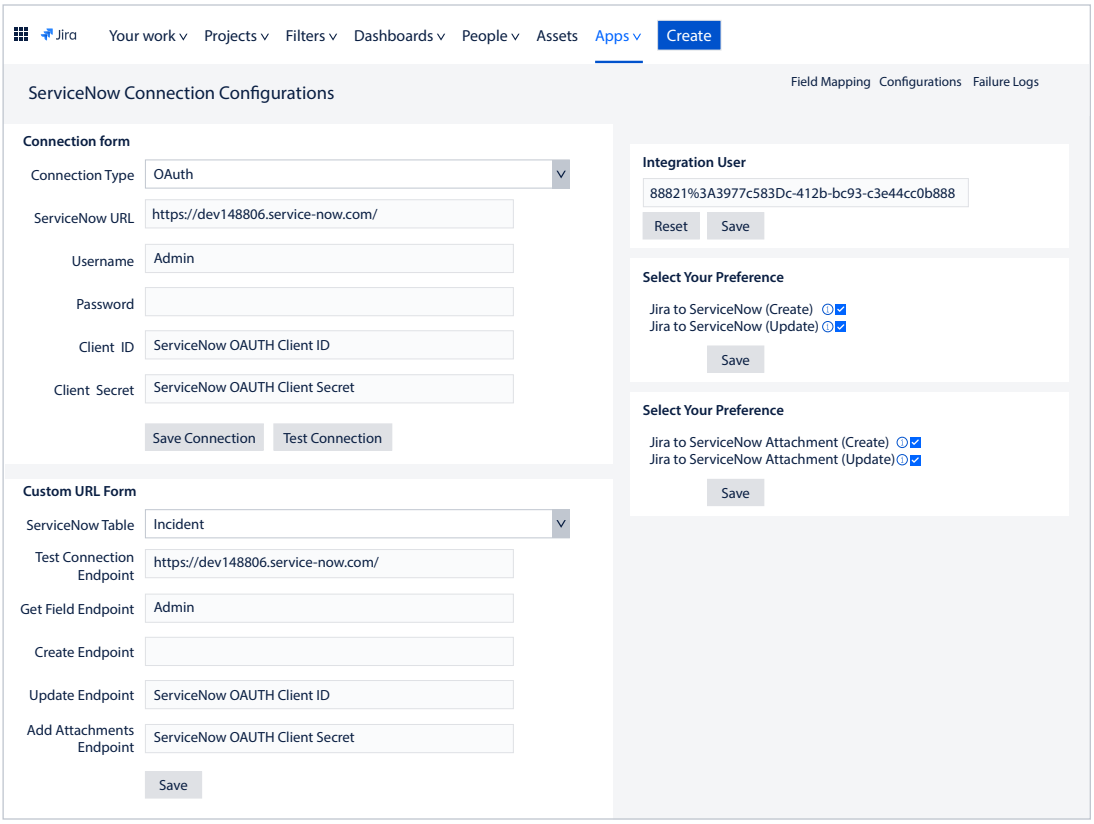
- Comments
- Description
- Attachments
- Sysid
- Incident number

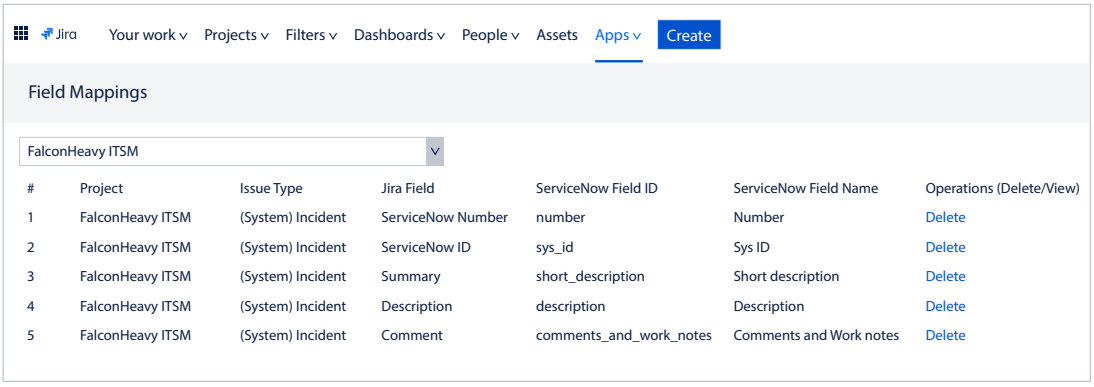
The integration was a bi-directional sync such that updates in a Jira Service Management incident were transitioned to ServiceNow and vice versa. No sensitive info was stored by the app; only the system access URLs and service account id. There were no limitations on data transactions and the ServiceNow Connector for Jira Cloud app assures data transfers by queuing any undelivered data.





The Empyra team installed the ServiceNow Connector for Jira app, entered the required connection information, and configured the field mappings between Jira Service Management and ServiceNow. Additionally, the Empyra team created two custom text fields in Jira Service Management to store the ServiceNow sysid and incident number data.





After completing the ServiceNow Connector for Jira installation and configuration, the Empyra team configured an outbound REST message and business rules in the customer's ServiceNow instance to push data to Jira Service Management.

Recommendations for working with Empyra for ITSM integration

- While the Empyra app is generally platform-independent to maximize flexibility, the team recommends that the payloads transferred between systems be similar (e.g., if there are attachment size limitations, the size limits should apply to both systems).
- The Empyra app can support both Basic and OAuth 2.0; however, the team recommends that customers use OAuth 2.0 for system access authorization.
- If customers are working with large attachments, Empyra recommends that the data be stored in a shared drive (e.g., OneDrive, Box, etc.) to improve efficiency and reduce costs.

Integration deployment

During the deployment, the Empyra team assisted the company's internal IT team with the ServiceNow Connector for Jira app installation and configuration. Additionally, Empyra helped the IT team with adding the required Jira Service Management custom fields, migrating the ServiceNow update set, and testing the integration functionality.

The integration continues to deliver value to Empyra's customer by managing on average 100 transactions per minute and reducing overall incident resolution time.

Solution benefits

The Empyra integration provides the following business advantages for their customer:

- Bi-directional data updates for incidents between Jira Service Management and ServiceNow, so teams in different organizations have the right data when needed.
- Optimized license usage, so the company reduces cost and maximizes the value of current licenses.
- Reduced incident resolution time, so the manufacturer's customer received improved service.

Conclusion

Evolving technology and erratic global markets are rapidly changing pace of business – and these factors are exerting substantial pressure on organizations' tools, processes, and people. In this fast-paced world, working together is critical for every company's success. Easy-to-implement integrations can reduce friction and help information flow across your organization; this is just a sample of the possibilities for ITSM systems.

Whether you're already in the Atlassian ecosystem and want to extend the value of your implementations, or you're considering a switch from an existing ITSM system, Jira Service Management can help you modernize your service management practices.

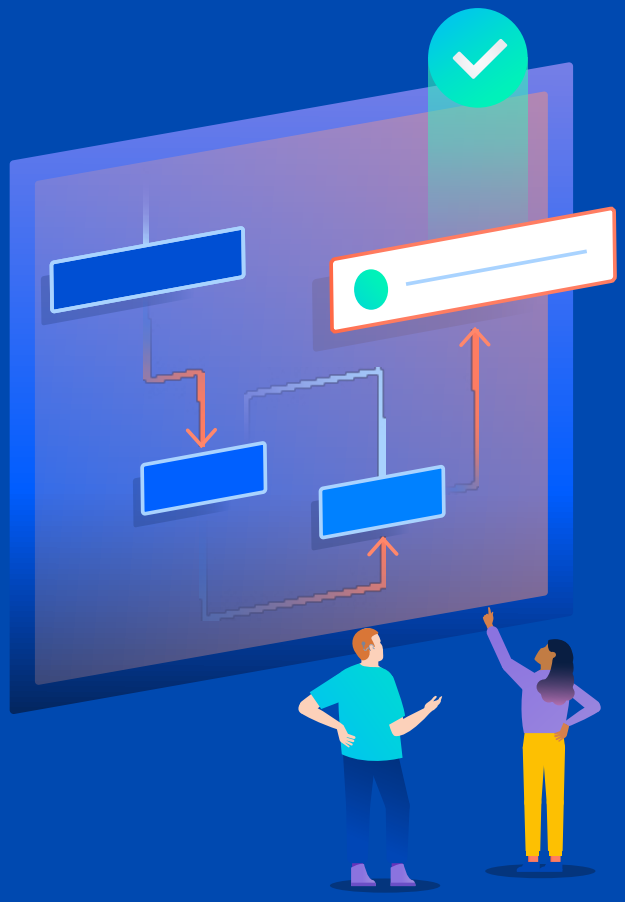
To take the next steps in your transformation journey, **learn more about Jira Service Management** and start your own free trial. You can also **visit Atlassian Marketplace** to learn more about Jira Service Management integration partners and their offerings.

Additional resources

The Total Economic Impact™ of Atlassian Jira Service Management

Complete guide to Atlassian's ITSM solution

The complete guide to Enterprise Service Management (ESM)



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