



# IT Systems Management: Designing, Implementing, and Managing World-Class Infrastructures

By Rich Schiesser

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*IT Systems Management* explains the relatively new study of the theoretical and practical aspects of managing an organization's IT infrastructure. Focusing on the key areas of people, process, and technology, author Rich Schiesser shows how systems management techniques can streamline the IT infrastructure so that it is optimally stable, efficient, and responsive.

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### Editorial Review

From the Back Cover

Design, implement, and manage world-class infrastructures.

- Develop bullet-proof processes
- Implement proven systems management techniques
- Streamline your IT infrastructure—regardless of size

*IT Systems Management* describes the process of managing any IT infrastructure to achieve optimum stability, efficiency, and responsiveness. By understanding and harnessing proven systems management techniques, organizations can leverage their IT investment in powerful new ways.

Infrastructure expert Rich Schiesser explains the theoretical and practical aspects of systems management, using observations, methods, and examples drawn from years of professional experience. *IT Systems Management* is based on the fundamental belief that people, process, and technology are the key ingredients in any successful IT organization and includes ground-breaking coverage on how to implement each key discipline in mainframe data centers, mid-range shops, client/server environments, and Web-enabled systems.

This accessible, but comprehensive guide:

- Offers an insider's perspective on all the disciplines of systems management
- Allows focused study for professionals concerned with any of the key systems management areas—people, process, and technology
- Describes how to develop, integrate, and manage robust, bulletproof processes

*IT Systems Management* is designed for IT professionals involved in designing, implementing, and managing any part of an IT environment or the entire infrastructure.

### About the Author

**RICH SCHIESSER** has led IT infrastructure groups at organizations such as Hughes Aircraft, the City of Los Angeles, and Twentieth Century Fox, and for 10 years he managed the primary data center at Northrop Grumman. Rich has also taught IT classes at California State University, Los Angeles, and the University of California, Los Angeles. As a consultant, he now designs and implements infrastructures for a variety of companies including Emery Air Freight, DIRECTV, Option One Mortgage, WhatsHotNow.com, and The Weather Channel.

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### Introduction

Few industries have grown as rapidly or as widely as that of information technology (IT). What began as an infant offshoot of the accounting profession a mere 40 years ago has since matured into a prevalent and

compelling force in nearly every segment of business, industry, and society in general. IT is the latest, and most significant, of cultural revolutions.

Futurist author Alvin Tofler, in his book on cultural phenomena, *The Third Wave*, describes three significant movements in American social development. These were the agricultural revolution of the late 1800s, the industrial revolution of the early 1900s, and the information revolution of the last two decades of the twentieth century.

Some 30 years ago Tofler correctly forecast many of today's social and technological trends. But even he could not predict the rapid rate of progress that the IT industry would sustain, nor its profound impact on living standards and business practices.

Much has been written about the various IT breakthroughs involving chip technology, compiler designs, hardware components, and programming languages. But little has been written about how to manage effectively the environment in which IT entities coexist and thrive. This environment is commonly called the *IT infrastructure*. The process of managing the many attributes that contribute to a stable, responsive IT infrastructure is known as *systems management*.

This book offers a historical perspective of the various disciplines of systems management, along with an in-depth technical treatment of each of them. The historical background explains the *when* and *why* of each discipline to enable a better understanding of its purpose and evolution. The technical treatment or process discussion of each discipline shows how to implement and manage each one effectively, regardless of the size or type of platform. For the first time, this book addresses systems management as it applies to mainframe data centers, midrange shops, client/server environments, and web-enabled systems alike.

The 12 disciplines of systems management are presented in the approximate order in which they became prevalent and integral to an infrastructure's operation. Obviously this prioritization will vary slightly from enterprise to enterprise, depending on the emphasis of applications running at a particular center.

## **Intended Audience**

This book is intended for IT professionals who are involved in designing, implementing, and managing parts or all of the infrastructure of an IT environment. An infrastructure usually consists of data and voice networks and communications, technical services, database administration, computer operations, and help desks. While the structure and composition of infrastructure groups may vary, the above represents a typical organization in a medium- to large-size IT department.

Most of the concepts presented here are based on experiences with infrastructure groups varying in size from 50 to 150 individuals, but the underlying principles described apply equally well to all group sizes. Smaller shops may have less need for implementing all systems management disciplines and should focus only on those that most closely apply to their particular environments.

The format and content of this book are based on a fundamental belief that *people*, *process*, and *technology* are the three key ingredients in any successful implementation of systems management. Three parts of this book are dedicated to these three key ingredients. There are primary and secondary audiences intended for each segment.

The intended audience for Part 2, "People," includes infrastructure managers, directors, and CIOs. For purposes of brevity and simplicity, this group will be referred to as *managers*.

Part 3, "Process," is especially intended for senior analysts, leads, senior systems administrators, and

supervisors who are typically involved with designing and implementing systems management processes and procedures. This group will be called Leads.

Part 4, "Technology," is primarily intended for technical professionals such as systems programmers, database administrators, operations analysts, and systems administrators who are responsible for installing and maintaining systems management products. Once again, for purposes of brevity and simplicity, I will refer to this group as *technicians*.

Secondary audiences will benefit from the parts of the book that are outside their primary areas of interest. For example, people issues will be of interest to technicians for topics such as communication and will be important to leads for the emphasis on teamwork.

The efficiency and cost savings of process improvements will be of interest to managers, while the elimination of duplicate work should be of interest to technicians. Each chapter of the part on technology contains an introduction and a summary to facilitate time-saving skimming for managers. Leads will find these chapters cross-referenced to corresponding chapters in the process section.

This book may also be useful to instructors and students at computer trade schools, at community colleges, in continuing education courses, and in university extension classes offering any training or education on the understanding or management of an IT environment.

## **Topics Not Included in This Book**

The term *systems management* as used in this book refers to the 12 specific functions of IT infrastructures that I have found to be the most prevalent and significant in relation to managing a world-class IT organization. As with virtually any business organization associated with American industry, few infrastructures are organized in exactly the same way. Some companies may include in their infrastructures more or less of the 12 functions that I describe in these chapters. Thus it is worth noting those related areas of the infrastructure that I chose not to include in this book.

I have not included asset management or release management. Asset management is primarily a financial and administrative function and is normally not an integral part of an IT infrastructure. While it is closely related to infrastructure management, particularly in the area of desktop hardware and software, most IT organizations view it as a procurement responsibility. In some companies, corporate procurement departments, which are outside of the IT organization, manage IT assets. Others have a separate procurement department inside of IT, but outside of the infrastructure, to manage IT assets.

Release management is essentially a development responsibility in the case of application software and a technical services responsibility in reference to system or support software. While technical services is clearly an integral part of any infrastructure, the technical details of how testing is performed on new operating system releases or on other control software, as well as how they are migrated, fall outside the scope of this book.

Similarly, I have not covered the infrastructure functions of systems, network, and database administration since any meaningful discussion of these important topics would require technical details that are beyond my intended focus. Elements of systems administration are touched upon in the chapters on availability and on performance and tuning. Some fundamentals of network administration are covered in the chapter on network management, and some of the basics of database administration are mentioned in the chapter on storage management.

Desktop support is usually an infrastructure activity, but I do not discuss it here due to the day-to-day details

of hardware and software maintenance that go beyond the emphasis of process design and management. For similar reasons, help desk management is not included, although both of these topics are touched on in the chapter on problem management. Another more timely reason for excluding these two areas is that many companies are now outsourcing their desktop support and help desk functions.

Three areas of traditional computer operations—batch scheduling, console operations, and output processing—are not included because automation, distributed processing, and the use of the Internet have reduced their importance. Finally, the book does not include a discussion of voice networks because they are highly technical in nature.

## **How to Use This Book**

This book is divided into four parts. Part 1 provides basic background on how and why the various systems management disciplines developed and evolved. It is informative reading for any IT professional desiring a basic understanding of systems management.

The remaining three parts address the issues of people, process, and technology. Part 2 discusses various people issues such as executive support, staffing, retention, organization, budgets, communication, customer service, supplier partnerships, and service level agreements. All IT professionals should read these chapters. While the emphasis is on traditional management topics, leads, technicians, and even desktop users should benefit from this enterprise-wide view of systems management.

Part 3 focuses on the process issues of systems management and consists of 12 chapters—one for each of the separate disciplines covered in this book. Each chapter defines what the discipline is, which technologies within the infrastructure are involved, and what types of technical tools are commonly used to manage it.

Technicians and leads should read all of these chapters thoroughly, with particular attention to the disciplines for which they are directly responsible. Managers should read the introduction and summary of each chapter to gain a basic understanding of systems management and then select those chapters that most apply to their enterprises for closer reading.

Part 4 describes how to use technology to develop and integrate robust, bulletproof processes to support any of the disciplines of systems management. Understanding how these processes integrate with each other is critical to the success of any systems management implementation. Applying the tried and true processes of traditional systems management to an open systems environment and to web-enabled applications is one of today's greatest challenges. These topics should be of particular interest to those involved with client/server systems and Internet applications.

Some of the techniques presented here are based on proven Baldrige National Quality Award (BNQA) methodologies. I became very involved with these methods and their practical applications while serving as an internal Baldrige examiner at a major aerospace company. While the emphasis on the BNQA has diminished a bit in recent years, the effectiveness of its process improvement techniques is without question.

Leads for any of the disciplines of systems management should read all of the chapters of Part 4. This will provide them with a sound basis for applying technology tools to process improvements and for communicating these improvements in detail to technicians and in summary form to managers. Technicians assigned responsibilities for either tactical or strategic disciplines should read those chapters applicable to their involvement. Managers should skim all these chapters to gain a good understanding of the important role of processes in managing a world-class infrastructure organization.

Since some chapters are intended to be skimmed by some readers to determine their applicability, I have

prefaced each chapter with a short introduction. There is also a brief summary at the end of each chapter to capture its essential highlights. Real-life examples of techniques that either succeeded or failed in actual enterprises appear in many of the chapters.

The appendices contain a section answering some of the most frequently asked questions about systems management, a summary of the definitions of the 12 systems management processes, and a glossary of terms used in this book.

## **A Note about Terminology**

The terms *process*, *function*, and *discipline* are synonymous for the purposes of this book—e.g., a systems management *function* of availability and the systems management *discipline* of security. Similarly, the terms *infrastructure* and *systems management* are used interchangeably when referring to the above three terms, as in the *infrastructure* process of availability being compared to the *systems management* process of security.

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