

REVIEW: ManagementStudio

Part II - Exploring the 4C's Methodology for Delivering Projects - CAPTURE

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The First 'C' is for CAPTURE

Back in the introduction article, I gave you a brief overview of what a project means, with particular emphasis on some of the more common challenges an organisation faces when tackling a project.

I concluded that piece by introducing you to ManagementStudio, an Enterprise-class software solution designed to be your companion throughout the lifecycle of your project and beyond. And as part of that introduction, I gave you a brief taste of the ManagementStudio methodology known as the 4C's.

In this second article, continuing with my "a project is like a book" analogy, we are going to get straight into the first chapter where, in a book, you are introduced to the main characters, their background, and the plot. All in anticipation of telling the story.

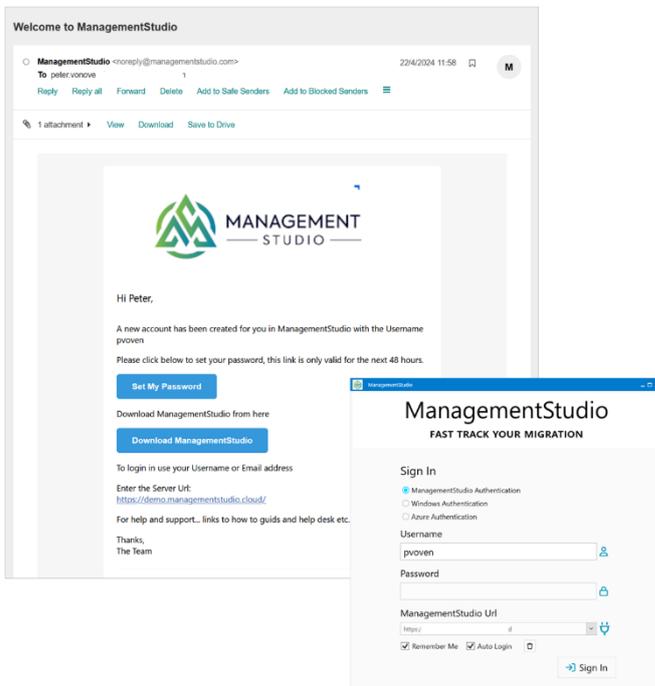
Well, that's exactly what this first stage of the project is going to deliver. The characters in this case are your users, the background is what they are running (devices, apps, operating system, etc.) and the plot, well that's the project objective! Let's just hope there are no plot twists along the way!

With this in mind I am going to give you a deeper overview of the 4C's methodology that I introduced you to, again, in the introduction piece, starting with CAPTURE.

This phase is arguably one of the most important project phases as it builds a comprehensive picture in helping you understand your environment today, and is, as you will see, a unique feature of the ManagementStudio solution in that there is no need for you to become Sherlock Holmes to go and find the data and information you need as ManagementStudio, in this case, does all the detective work for you.

Getting Started

As part of my review of the ManagementStudio solution, I was granted access to a demo platform and before I even got started talking about Capture, I am immediately greeted by two of the other four C's.



In this case Collaboration (the invite to the project) and Communications (the invite email).

As shown in the screenshot, I was invited by one of the team members to become a collaborator and join an existing project.

From here I could easily set my password by clicking the link in the email and then follow the link for downloading the ManagementStudio client.

Once downloaded I can then simply log in and access the projects to which I have been invited to collaborate on.

All in all, a pretty straightforward process to get up and running.

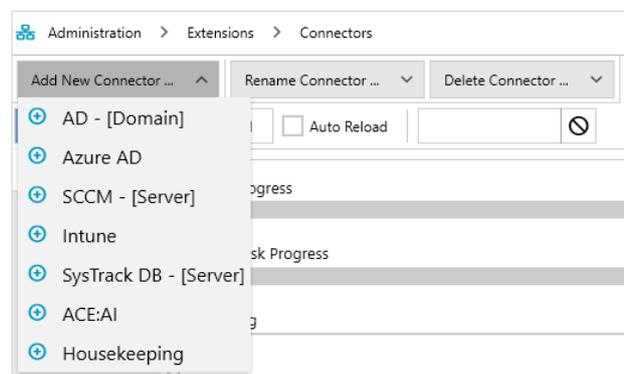
Connecting to Data Sources

As I have highlighted previously, with the ManagementStudio Capture methodology, and as the feature suggests, Capture will collect all the required information about your users, devices, applications, and so on. It does this using what ManagementStudio calls a connector. So called a connector as it connects to your environment, but not just a single connection method.

ManagementStudio not only supports on-premises domains and, of course Azure AD, it can also capture data from SCCM/MECM and Intune as well. But interestingly I found a couple of other connector types I wasn't expecting to find but are equally excellent sources of information about your environment.

I'm not going to focus on the obvious ones for now, but instead the ones that are a bit more unique. As you can see from the screenshot, information can be captured from a Lakeside SysTrack server.

For those not familiar with Lakeside and its SysTrack solution, it is typically used to gain insight into your end user computing environment providing real time monitoring of end points, enabling fast resolution of issues that affect the end user experience.



It also provides a great platform for assessing environments when moving to or updating virtual desktop infrastructure. I've used it many a time to build that picture of what my environment will look like when virtualised.

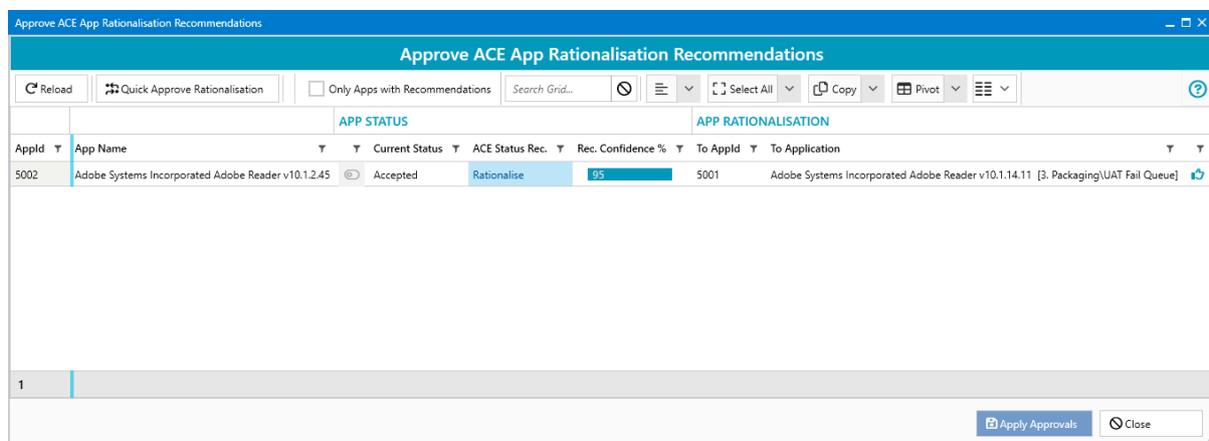
Therefore, this provides an excellent data source for ManagementStudio to collect data from to create the baseline for your project. Perhaps in the future we might see ControlUp, Liquidware, or other tools that are used in assessing an end user environment being a data source. Although I'm told that exports from these systems, and others, can be auto ingested into ManagementStudio via a feature called Import Contracts.

Given the current focus around AI, it's not surprising to see an AI option listed on the drop-down list of connectors in the form of ACE:AI. ACE in this instance refers to Asset Confidence Engine. A unique feature of the ManagementStudio solution. In a nutshell what it does is to manage the unwieldy number of applications an organisation is likely to have by rationalising the number of apps you have. One thing I have learned over the years is that I've never come across a customer that knows exactly how many apps they have deployed. While you might say, for example, you have 1,000 applications, that usually refers to the high-level unique application names. Word, Excel, PowerPoint etc. for example.

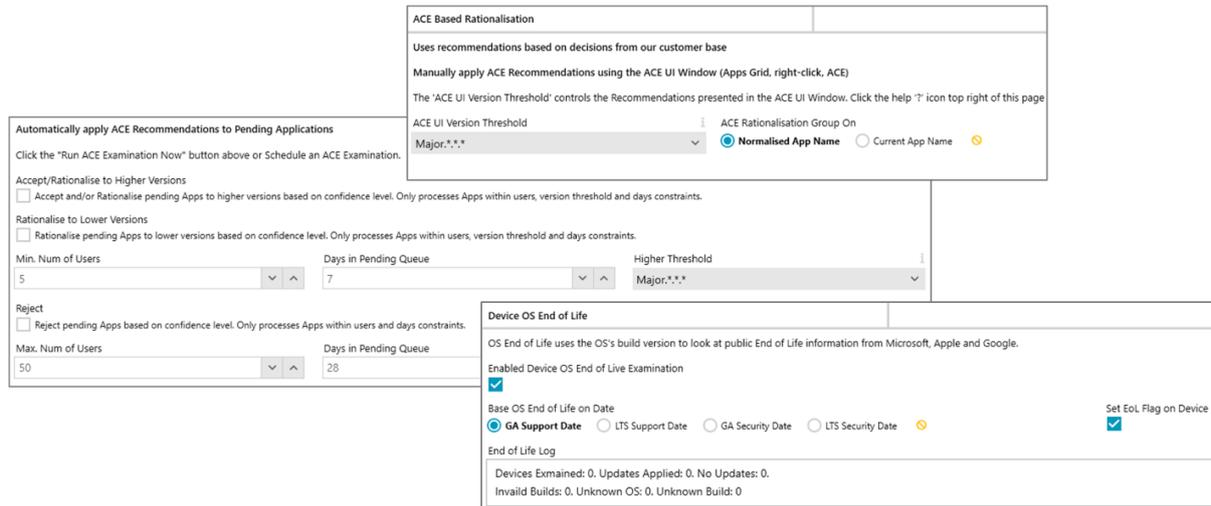
But how many different *versions* of those applications do you have? Maybe 10, maybe more. As each version is an application entity in its own right the application count can quickly rocket. If within your 1,000 apps there are 10 version of each of those apps then now you are looking at 10,000 applications! How do you quickly rationalise those applications and work out what you need and what you don't?

Although I would not technically describe this feature as a source of data capture, I want to take some time to explore ACE:AI in a bit more detail given its uniqueness and what it delivers above and beyond any spreadsheet could ever dream of. I guess it falls under the 'connector' heading as you connect to the ACE Server to run the AI engine.

ACE:AI can reduce the number of applications by collecting application information from all other ManagementStudio customers that configure the ACE:AI feature. All data is collected anonymously and allows each customer to approve or reject applications that are used meaning you can quickly rationalise your application estate. Removing those apps or app versions that are no longer used. It gives you what is referred to as a confidence level. Doing this before you start a project is essential as you don't go into a project trying to deal with applications that are out of scope and not actually going to be used in the future. Therefore ACE:AI will assist in rationalising your application estate.

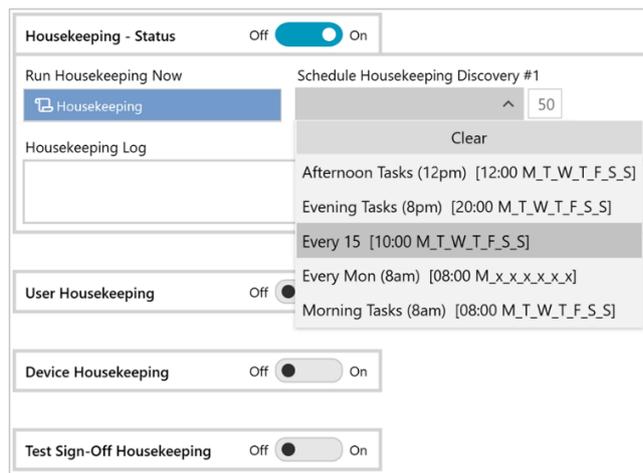


There is a lot more to this feature than I can cover in this review, but to finish off the ACE:AI discussion, it is important to point out the automation elements. You can automatically accept recommendations and base those recommendations on application versions and whether they are major, minor, or just a different build number. If you have discovered apps that you haven't yet decided on and, as a result, will show under "pending", then you can automate what happens if the apps have been pending for a set period of time. You can opt to rationalise to either a newer version, a lower version, or just reject the apps. And if the app isn't part of the ACE database, then there are a number of rules you can execute.



One thing that I also wanted to point out is that you can also do this for operating systems, checking with the vendor what the support or security update status is for that OS.

Finally, before I wrap up on discussing ACE:AI, I wanted to highlight that this process can be configured to run continuously at scheduled intervals. This in effect delivers a fully automated application and OS lifecycle management solution. As I've said before, ManagementStudio goes way beyond being just a point solution or used for single projects.



There is also one final connector that also sounded interesting that I want quickly to touch on, and that is Housekeeping.

Exactly as the name suggests, Housekeeping, which can be scheduled, basically sends in the maid to clean out obsolete data.

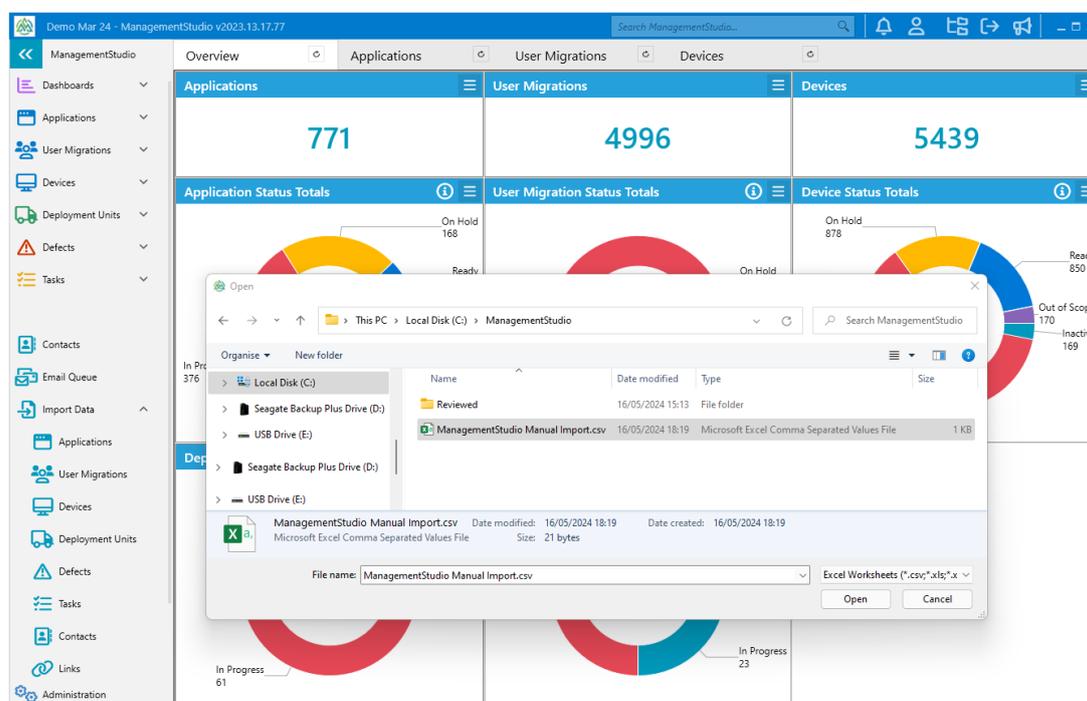
As with the ACE:AI option it too isn't an actual data collection process. In fact, it is the opposite in that it cleanses the data removing or archiving user accounts or devices when they are inactive, disabled or deleted from Azure or on-premises AD.

What if I already have data captured?

I've described the automated process for capturing data about your environment, but what if there is information that you already have and that you won't find in any directory service or assessment tool?

What if you have used legacy methods of recording data or have output data from some other solution and that data has been saved as a spreadsheet? Does that mean I have to type that all in again into ManagementStudio? Absolutely not!

As you can see from the screenshot from the demo platform, there is an “Import Data” section on the menu which expands further to allow you to import specific sets of data such as applications, device, and contacts.



Selecting the category for the data import then pops up a dialog box from where you can browse to the source data file.

The important thing to remember here, and another feature of ManagementStudio, is that data doesn't just get 'dumped' it gets integrated. So, information and data get mapped to the correct location.

Having talked through the options for collecting and importing data automatically from existing sources, there is one very important source for data capture that I haven't touched on and that is the human element and talking to your employees.

Ask your employees

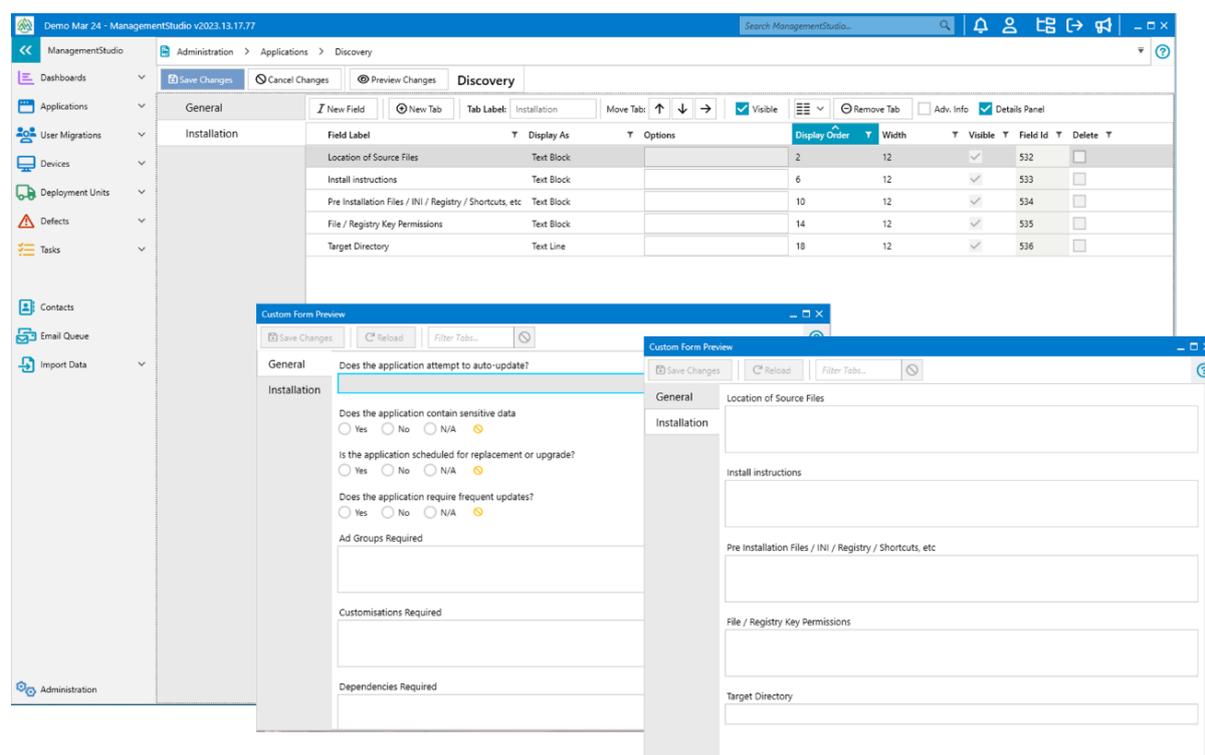
Having worked with end-user computing technology for the majority of my IT career, I've always been a huge advocate of involving the consumers of the technology you are about to deploy for them at an early stage as well as ensuring continuous conversations take place. We will talk about that in a later article. While all these capture tools are great for collecting physical data, there is no substitute for talking to actual people. They will be able to give you a complete insight of how they work, and what they use. In short, your workforce will add the context to the data you capture.

For example, typically directory services are not always complete. I mean that all the fields of information are not always fully populated, particularly when it comes to contact and location information. So how do you know where people work from? From home? From multiple office

locations? Or something else? Also, by doing this, you have the factual “straight from the horse’s mouth” info as consulting with employees not only makes them feel included in the project but they can give you a full insight into the way they work. Maybe the apps they have don’t fit their role. Maybe, the apps don’t perform well enough. No point in migrating resources if they are the wrong resources.

These are all things you might miss but are equally as important when rolling out any project. And this doesn’t just stop at the capture phase with ManagementStudio, it continues throughout the life of the project and beyond, which I will talk about in a later article.

For now, I’m just going to discuss how ManagementStudio captures information from the user community, and how this is achieved by the use of dynamic forms. Dynamic in that you can completely customise and design them to capture exactly the information you need.



As you can see from the example screenshots, the dynamic forms can be used to collect an even more comprehensive set of data and information about your current Preview environment that you won’t be able to capture from static data sources, such as directory services or assessment tools. What about the type of data and whether it is marked with some form of official classification and therefore needs to be dealt in a different way.

Or my favourite question is to ask is where to find the installation media for a particular app and if there are any particular configuration details an app requires. All things that only the users of the application will likely be able to answer and where ManagementStudio can provide a platform to collect this information.

If you remember back earlier on in this section, I mentioned the fact that directory services typically will not have some fields such as user location or contact details added, well I’ve just described how ManagementStudio enables you to go and collect this information, but it can go a whole step further. If you allow it, ManagementStudio can actually update your directory services should you want it to.

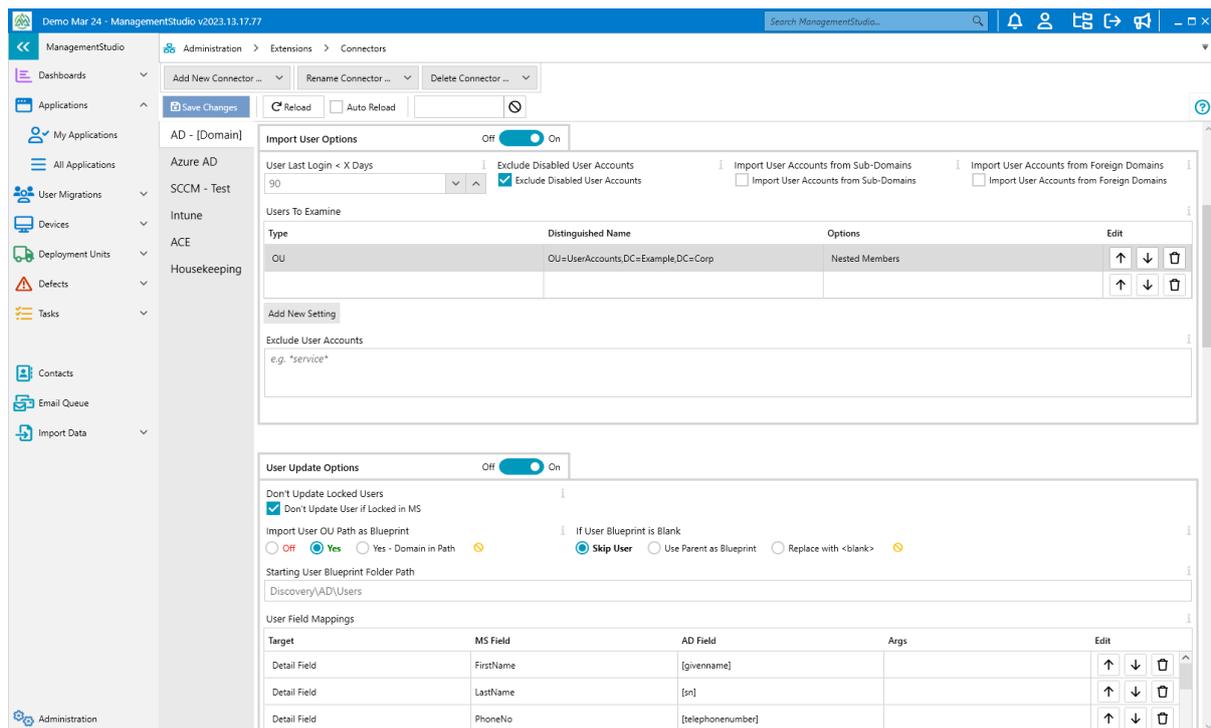
Particularly useful if you need to figure out where users will be when it's their turn to be migrated or upgraded.

When is too much data, too much data?

I think the saying goes something along the lines of “knowledge is power”, and while I agree with that saying I would go further and actually say “specific and relevant knowledge is power”. After all, there is no point knowing lots about stuff about stuff you don't really need to know about. Unless you regularly partake in pub quizzes that is!

So, what is my point here. The point I am making is that there is no point in collecting and storing irrelevant information and data. And that is true in ManagementStudio. For example, if you have groups of users that are always going to be out of scope for any given project then why collect data on them. Perhaps machine accounts within the organisation. Or a particular group of machines that you don't manage. Either way you can control what is and what is not captured by excluding them for the data capture right down to the individual information fields.

For example, you might just want the username and not job title or department. And this isn't a one-hit-wonder either. Any data that gets updated at source, AD for example, can be, if you enable the feature, be updated in ManagementStudio too.



The upshot is that you can fine tune the information you capture and ensure that it is also always automatically up updated. No need to start the whole process over again for a new project.

In Summary

In this second review I have introduced you to the first of the ManagementStudio 4C's methodology. That being Capture. Capturing data, as you have seen is, if anything, the most important phase of any

project. It gives you the baseline or snapshot as to where you are today so that you can map out your project. After all, there's no point planning your journey if you don't know where you are starting from.

In this review I've walked you through the AI features of rationalising applications, connecting to data sources using connectors and how you can filter data, so ManagementStudio presents you with only data that is relevant.

As part of that whole capture process, another of the four C's made a quick guest appearance in what I believe is one of the most critical parts to any project, and that's Communication. I touched on the ManagementStudio dynamic forms feature that allows you to create custom forms to send to your workforce to capture specific information that you won't get from any other source other than those that actually use the applications and devices.

I've probably only really scratched the surface in what I have covered in this article and would wholeheartedly recommend you contact one of the ManagementStudio team to show you the full capabilities of the solution.

I will leave you with one thought that has become apparent whilst reviewing the ManagementStudio solution, and that is given how it continuously and automatically captures and rationalises information, it is far more than just a project management solution. It provides a solution for business as usual (BAU) too, in that it can manage the entire lifecycle of your environment making recommendations for future application upgrades and migrations.

Whats Next?

In the next article I am going to take you further into the 4 C's with CONTROL and explore the features and capabilities of ManagementStudio and how you can now use the captured data to start delivering your project.

In the meantime, if you want to see ManagementStudio in action, then head over to the web site for a demo - <https://managementstudio.com/demo/>



About the Author

Peter von Oven is an experienced technical consultant working closely with customers, partners, and vendors in designing technology solutions, to meet business needs and deliver outcomes. During his career, Peter has presented at key IT events such as VMworld, IP EXPO, and various VMUGs and CCUG events across the UK. He has also worked in senior presales roles and presales management roles for Fujitsu, HP, Citrix, and VMware, and has been awarded VMware vExpert for the last ten years in a row including vExpert EUC, vExpert Pro, and now the new and as yet unnamed Omnissa EUC Expert community.

Today he works with partners and vendors helping drive and deliver innovative technology solutions. He is also an avid author, having now written eighteen books and created numerous videos on the subject of VMware end-user computing solutions.

In his spare time, Peter volunteers as a STEM Ambassador, working with schools and colleges, helping the next generation develop the skills and confidence in building careers in technology. He is also a serving Royal Air Force Reservist currently working as an instructor with the Air Cadet organisation.