



KINETIC REQUEST

BMC® Remedy® Action Request System® and Service Catalogs:

The Kinetic Request Approach

Introduction

Service catalogs have become the foundation for defining and delivering services, as well as for demonstrating the value of IT, HR, facilities, procurement, sales and marketing, and other service-oriented groups to any business. They offer any enterprise function a way to publish available services, standardize service deliverables, establish service level expectations, and market service offerings to internal and external customers. For IT in particular, several factors are driving their adoption by large organizations. These include the increasing pressure on IT organizations to:

- Document and communicate their value to the business;
- Reduce costs and increase efficiencies;
- Reduce service request backlogs through standardization and automation; and
- Adopt Information Technology Infrastructure Library (ITIL) standards in service delivery management (SDM), of which service catalogs are a key component.

In fact, growing interest in ITIL has pushed service catalogs to the forefront. ITIL is widely accepted as the de facto set of best practices for IT service management (ITSM). Thousands of organizations around the world have adopted ITIL's philosophies and guidelines, in one way or another; and an entire ecosystem of ITIL tools, certifications and consultants have sprung up around it. ITIL doesn't define how service catalogs should be created, but a consensus of opinion among analysts and IT professionals

suggests that effective ITIL-compliant IT service catalogs (or rather the enabling software) should:

- Give internal customers a high-level, accessible Web-based menu of IT services, using terminology that business users understand.
- Tailor access to the needs of different customers, showing them only what they need to make service requests. The customer experience when using a service catalog should be similar to the streamlined and tailored experience provided by eBay®, Amazon®, Yahoo® and other personalized interfaces.
- Provide authentication and role-based security with the flexibility to produce service catalogs for areas outside IT, as well as to enforce segregation of duties and other compliance requirements.
- Be simple to create and easy to expand over time. Large IT organizations fulfill hundreds of different types of service requests, many involved and complex, but they spend most their time providing a handful of common services. Most observers recommend that IT organizations start with the five to 15 most frequent types of service requests when creating service catalogs, as these represent quick wins.
- Leverage existing ITSM applications. Most large companies have made significant investments in help desk, service level agreement, change management, asset utilization and other applications. Many new software vendors offer automated SDM products, but most are not designed to easily work with and leverage existing investments in ITSM applications, such as those from BMC, HP, SAP®, Oracle® and other large enterprise software vendors. Rather, these new SDM applications have been designed from the ground up to create and manage service catalogs and as standalone functions. Consequently, businesses with a large stake in installed ITSM software are advised to create service catalogs using the existing features and capabilities of their ITSM applications or employ service catalog software developed in the native environments of this software.

A key factor driving the adoption of IT and other functional service catalogs is cost reduction through standardization and automation. Several studies conclude companies that have implemented automated service catalogs have significantly reduced service delivery costs and improved service quality. Secondary benefits of automated service catalogs include:

- Service catalogs force IT, HR and other areas to document their current practices—often for the first time ever—and compare their own internal service delivery cost and quality to those of outsourced providers.
- IT and HR, two of the most visible service delivery functions in any organization, have an ever-growing backlog of service requests. By reducing these backlogs, service catalogs significantly reduce the frustration users experience while waiting for requests to be fulfilled.
- Service catalogs provide a vehicle for determining which services are repeatable and therefore candidates for standardization.
- Service catalogs help define the business value of a particular service. Companies can easily determine if service delivery costs align with the goals of the organization.

BMC Remedy Action Request System (ARS) and Service Catalogs

Today, the market is crowded with vendors trying to create and adapt tools to provide service catalogs. These include professional services automation vendors, help desk and incident management vendors,

Enterprise Resource Planning (ERP) vendors, project management vendors, systems management vendors, service-level management vendors and specialty niche providers. Many of these products take a ground-up approach to service catalog systems with features that overlap BMC Remedy functionality or are poorly integrated with the BMC Remedy ARS environment.

The BMC Remedy ARS platform was designed to help large organizations meet three key business needs:

- Replacing outdated manual systems with process automation that speeds the handling of routine tasks;
- Rapidly prototyping, deploying, maintaining and integrating service management applications, including service catalogs; and
- Capturing and tracking critical business data.

BMC calls the BMC Remedy ARS development environment “request-centric, forms-driven and workflow-based.” The same description perfectly describes the underlying architectural foundation of modern service catalogs. All that’s needed to expand the BMC Remedy ARS platform from primarily an IT incident management tool into an enterprisewide service delivery platform is a service request management application designed to work with BMC Remedy ARS forms, processes and workflows.

In other words, BMC Remedy ARS can provide the perfect back end for a comprehensive enterprise-wide service catalog system, eliminating the need to acquire and install redundant service management applications. What's been missing is a quick-to-implement BMC Remedy front-end service catalog application that leverages BMC Remedy ARS functionality and allows organizations to enhance the value of their BMC Remedy investment with simple and easy-to-create service catalogs. This need has now been met by Kinetic Request.

Kinetic Request

Kinetic Request is the only “built on BMC Remedy” service request management system (SRMS) application that works with any BMC Remedy ARS standard or custom application. It enables organizations to quickly build and implement actionable ITIL-recommended service catalogs. Unlike many bolt-on SRMS applications, Kinetic Request works with any BMC Remedy commercial off-the-shelf (COTS) or custom application, regardless of version, and extends service catalog functionality beyond the IT department. And Kinetic Request requires no separate management systems or integration effort and introduces no redundant processes.

In brief, the features that make Kinetic Request an attractive service catalog tool for organizations using BMC Remedy include:

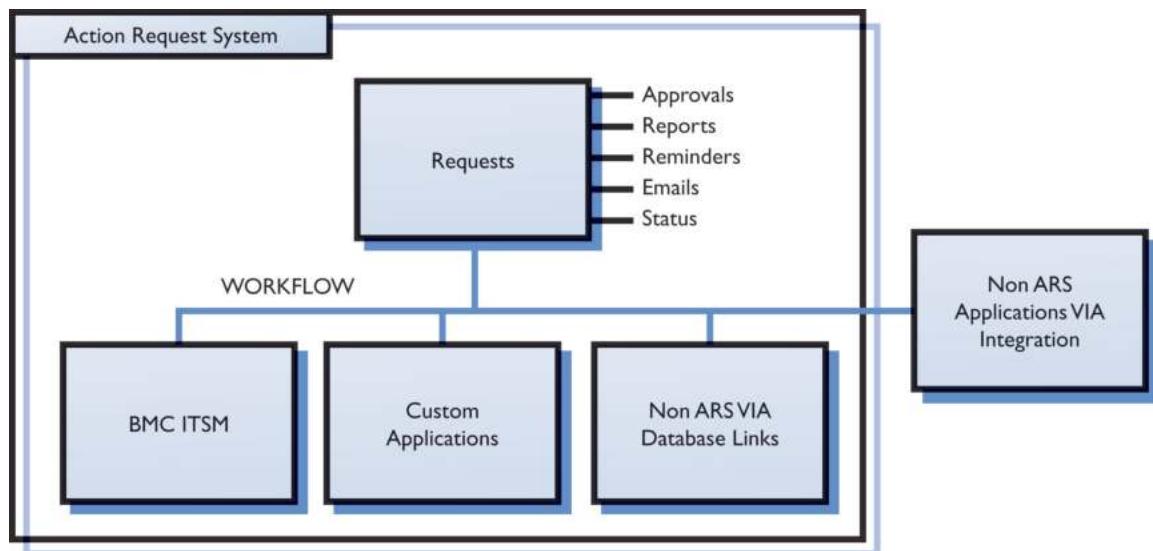
- Kinetic Request enables users without BMC Remedy development skills to quickly implement and build actionable service catalogs. This enables functional groups outside of IT, such as facilities and HR staff, to create catalogs and manage requests utilizing service process workflows in BMC Remedy.
- Kinetic Request enables automatic management and fulfillment of user service requests by enabling requests and approvals to be embedded in email messages.
- Kinetic Request provides effective management of service requests by enabling users to track the status of their requests and management to accurately monitor service delivery time and quality.

A BMC Remedy Service Catalog Front End

Kinetic Request provides the front end for a service catalog system. It creates and manages service catalogs with an easy-to-use interface and a variety of automated tools. The fulfillment end of service catalog requests is provided by BMC Remedy ARS (or the Kinetic Task advanced workflow automation engine, which comes bundled with Kinetic Request), as Kinetic Request utilizes existing BMC Remedy processes and

workflows. For example, if your business already uses a BMC Remedy service desk application and has an established and efficient process for ordering PCs or workstations, that process would be one item in a Kinetic Request service catalog that is published to customers via a Web browser. Users click on the Kinetic Request service catalog item, complete the service request form and submit the request, which is then fulfilled using your existing BMC Remedy service desk or incident management workflows. Users can then track the status of their requests over the Web in much the same way customers can track the status of a UPS® or FedEx® delivery.

Kinetic Request features that make service catalog publishing easy include the ability to:



- Group request forms by category;
- Use security controls to show only valid request forms;
- Search by keyword across categories;
- Customize the look and feel of a catalog and associated request forms;
- Activate or deactivate a service request form;
- Include sample service request forms;
- Create forms in multiple languages
- Configure locale-specific error messages (such as “required field missing,” “form already submitted” or “connection problem”); and
- Provide a description of the service request to be used in the service catalog display.

Another valuable feature of Kinetic Request for BMC Remedy users is its ability to create catalogs quickly and incrementally using the BMC Remedy foundation already in place. Corporate service functions may fulfill hundreds of different types of requests. For IT functions in large organizations, the number could be in the thousands. A common mistake in creating service catalogs is service-delivery functions “biting off more than they can chew” by attempting to publish the entire catalog of potential service requests right out of the gate, instead of starting with high-volume service requests that represent the greatest potential to increase efficiency and customer satisfaction.

Kinetic Request makes it easy to start modestly but quickly with the 15–20 service items that represent the biggest wins for service providers instead of requiring a lengthy and unwieldy “big bang” approach to service catalog creation. It also provides the flexibility to easily create additional service catalog items and forms on an incremental basis. Kinetic Request features that enable a fast start and incremental growth of service catalogs include the ability to:

- Use sample forms as a starting point;
- Use any form as a template for questions, text, images and pages;
- Build form layouts in a visual editor for form layout;
- Create a rapid feedback loop from design to implementation; and
- Develop forms within the tool and make them live with the push of a button.

A Better Customer Experience

Another important consideration in service catalog creation is the customer experience. Users have become accustomed to web pages and web forms that are tailored to their unique needs and preferences. Google, eBay and Amazon are just a few examples. But many organizations still use antiquated applications that require users to wade through irrelevant information or download and fill out one-size-fits-all PDF-based forms. Kinetic Request enables organizations to target and streamline the user experience. Features of Kinetic Request that tailor the customer experience include the ability to:

- Hide or display questions and text based on previous answers or events;
- Prefill usernames and any other information found within Remedy ARS;
- Do in-page queries and set field value actions;
- Link to external web pages;
- Use client-side actions such as mouse-over, on-click, on-change and mouse-out to control information display;
- Include “hoverable” help text for any element;

- Specify that a user must login (to BMC Remedy) before accessing a form;
- Allow users to go back and change answers submitted on previous pages;
- Allow users to view completed results from a web page;
- Include custom JavaScript to extend functionality;
- Branch to different pages based on customer answers; and
- Include any valid HTML markup in the body of the request form.

BMC Remedy Integration

Kinetic Request works with both BMC Remedy and non-BMC Remedy applications. In the latter case, Kinetic Request integrates to non-BMC Remedy applications via Web services, Java API or other supported integration capabilities. For BMC Remedy users, Kinetic Request offers significant advantages in terms of creating efficient automated workflows and lowering training and support costs. Examples include the:

- Ability to push data from an originating ticket into a form for auto-population of answers or for reporting needs;
- Integration of BMC Remedy SLM/SLA applications to Kinetic Request forms to monitor and enforce service levels;
- Ability to use the BMC Remedy Approval engine;
- Use of the BMC Remedy-published Java API by Kinetic Request's Web component; and
- Ability to write Web exceptions back into a BMC Remedy form.

One key feature of Kinetic Request is the use of automated and manual workflow tasks triggered by customer submissions of service catalog requests. For example, requests can automatically create records in other BMC Remedy applications, including service management applications, for follow-up actions such as request fulfillment. Manual and automated approvals are also easy to include in Kinetic Request workflows. In addition, since Kinetic Request also integrates with non-BMC Remedy applications, tasks can trigger events in applications from Siebel®, Oracle and other software vendors.

Kinetic Request's task processing also encompasses complicated task sequencing in which tasks are dependent on other tasks. For example, an internal customer orders a piece of equipment from a Kinetic Request Web-based catalog, which requires expense approval. Approving the purchase is the first task; completion triggers placing an equipment order—the second task. A third task would be notifying service personnel that the equipment is ready to be installed. Many other potential tasks can be dependent on how preceding tasks are handled. Meanwhile, users can log into Kinetic Request to view

the tasks involved and their respective statuses, enabling service providers to keep customers informed on the progress of their service requests.

Leveraging BMC Remedy to Extend Service Catalogs Beyond IT

As interest in service catalogs grow, they are moving beyond IT departments. Other service-centric departments, such as HR, facilities, sales and marketing, procurement, and legal services want the same sort of business alignment that they see IT achieving with a service catalog. Kinetic Request has numerous permission- and role-based security features, allowing enterprises to push service catalog functionality to departments outside IT and further leverage the functionality of BMC Remedy. HR, for example, fulfills dozens of different types of service requests, from changes in employee information to insurance and benefits to provisioning for new employees. With role-based security, departments such as HR can set up their own service catalogs, “brand” their look and content, assign specific user access rules, and completely control access to request forms creation and management.

With Kinetic Request and BMC Remedy, service catalog functionality isn’t limited to internal customers. Organizations frequently fulfill service requests from customers, partners, prospects and other groups. What many of these processes have in common is that, like BMC Remedy ARS itself, they are request-centric, forms-driven and workflow-based. Many external service requests are therefore ideal candidates for presentation to external customers in a service catalog form. External customers will often, for example, visit your website and request to be added to your email newsletter list to receive product information or to report service or product problems by filling out forms that could easily be linked to a service catalog. The same is true of partner programs wherein partners may request logos, marketing materials, product information and support, and other services. For both internal and external customers, online request forms can easily be created with Kinetic Request and then processed through BMC Remedy.

More value from BMC Remedy ARS

Many organizations have limited their use of BMC Remedy to IT service management applications, but the BMC Remedy ARS architecture is capable of much more. Kinetic Request is an easy way to add valuable functionality to BMC Remedy in a cost-effective manner. Kinetic Request can expand the use of BMC Remedy ARS platform from primarily an IT incident management tool into an enterprise-wide service catalog platform—without any complex integration effort, overlapping functionality or duplicated processes.

Because Kinetic Request is built on BMC Remedy, it works seamlessly with other AR System applications, packaged or custom built, regardless of version. Integrating an application to Kinetic Request is a simple, one-time process. Once Kinetic Request is installed, BMC Remedy ARS administrators can automate and centrally control enterprise service catalog processes and apply feedback and security rules—but the power to easily create and manage service catalogs is distributed across the enterprise. Finally, using third-party reporting tools, business users can easily combine Kinetic Request and BMC Remedy data—including data from CRM, sales and marketing, HR, and legacy applications linked to BMC Remedy—to produce timely, data-driven insights into service fulfillment efficiency and quality.

About Kinetic Data

Kinetic Data is one of the largest and most experienced third-party BMC Remedy software companies in the world, offering the most extensive portfolio of third-party, “built on BMC Remedy,” packaged applications available. A BMC Remedy Technology Alliance Partner since 1999, Kinetic Data has helped over 200 Fortune 500 and government customers—including General Mills, Avon, Intel, 3M, and the U.S. Department of Transportation—implement BSM and service delivery management (SDM) applications aligned with ITIL best practices. In 2009, the World Wide Remedy User Group (WWRUG), an independent group of BMC Remedy users, named Kinetic Data “Innovator of the Year,” and the group honored Kinetic Data with its “Best Customer Service and Support” award in 2010. The company serves customers out of its headquarters in St. Paul, Minn.; offices in Sydney, Australia; and through a network of leading BMC Remedy reseller partners. For more information, go to www.kineticdata.com.