Service Request Management

Getting Started with Remedyforce Series

Rob Monton (BMC Software)

Kedar Zavar (Cloudaction)

08 May 2015

Welcome to the "Getting Started with BMC Remedyforce" Series

Today's IT departments must drive business growth and innovation, while coping with less resources and increasing complexity. To do this, they require an IT Service Management solution that provides best practices while minimizing costs. BMC Remedyforce is built on Salesforce—the world's most widely used cloud platform—to deliver complete IT service management functionality with the secure social, mobile, and collaborative capabilities users expect.

With the "Getting Started with Remedyforce" white paper series, our aim is to help you leverage BMC Remedyforce to improve the effectiveness and efficiency of your ITSM operations. Each paper addresses a specific area of interest and provides you with conceptual, functional and technical best practices to make configuration decisions and take action to gain value from your BMC Remedyforce investment.

Service Request Management

Service Requests are a great way to introduce your end users to the concept of self-service. This gives end users the freedom of submitting requests on their own time as opposed to being on the phone and on hold. Service Requests also allow for specific data gathering that would otherwise be missed if the request is simply sent in via another method, like email. By asking questions on the service requests, your organization can obtain all of the information required to fulfill a request the first time without having to go back to the requestor for additional information. This sets the stage for a more efficient service delivery.

The key goals of Service Request Management are to:

- Empower end-users to self-serve
- Standardize a catalog of common requests
- Manage support and asset requests
- Provide an intuitive interface
- Provide consistent information about requests
- Automate approvals
- Maximize and report on service quality and efficiency

Key Components in BMC Remedyforce

The following are the key components in BMC Remedyforce that support Service Request Management:

- Self-service: The self-service interface (available via browser and mobile) is a portal where client users can select a service request from the service catalog and submit it for processing.
- Service Catalog: The service catalog is a repository of available and agreed-upon services that IT provides to customers. The service catalog maintains operational information about the available services. Each service request definition can define a business process. The service catalog provides options such as information on categorization, pricing information, and selection of the templates that support the fulfillment of a request.
- Request Management: Request management provides templates to support the services in the catalog. Request Management manages the implementation of the Service Requests.

Alignability Process Model (APM)

If you are just getting started with Service Request Management, and especially if you are planning to leverage BMC's out-of-the-box capabilities, Remedyforce provides a best practices framework via the Alignability Process Model (APM). The APM describes a set of predefined processes for the

delivery and support of information technology (IT) services and illustrates how ITIL processes map to work instructions performed in BMC Remedyforce. The model was built to provide an easy-to-use interface that provides quick access to detailed information regarding service management processes.
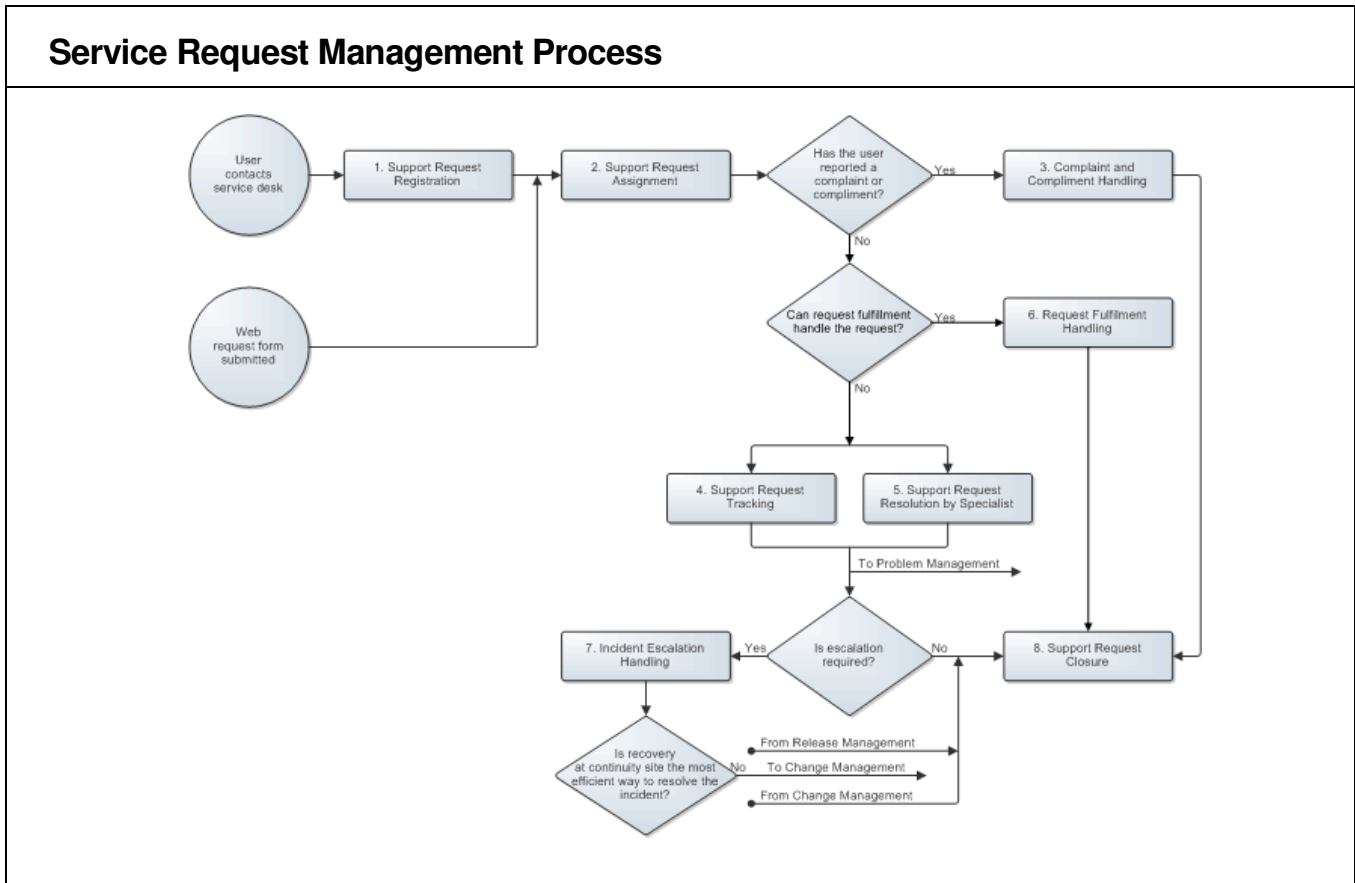
Service Request Management Process

Figure 1 – Service Request Management Process

For more information about Remedyforce's Alignability Process Model Request Management, you can access it by logging into Remedyforce, navigating to the Alignability Tab, and clicking on the desired process. If you do not see the Alignability Tab, click on the + sign (All Tabs) on the menu bar. The list of tabs will then appear.

Configuration Steps (High Level)

This section includes the steps and on how to configure Remedyforce for the various options.

Tasks to configure Service Request Management

- **Create the service.** Services allow you to define the exact details of what you provide to clients.

- **Create the service offering.** A service offering is a service that an organization makes available to its users. A service offering defines a specific agreement between a service provider and a client for the service.

- **Create the following templates:**
  - Incident and Request Detail: These are used to store the service request records created from the service request definition.
  - Change and Task: Required to fulfill a service request.

Copyright BMC Software, Inc. 2015

- **Assign a default queue.**
- **Create the accounts and profiles** that to should be allowed(entitled) to the service request definition
- **Create the required Service Request Definition (SRD).** An SRD is a service request that is available to clients through self-service. SRDs provide the options required to facilitate the selection and execution of delivery for a service request.
- **Make the required service request definitions online.**
- Optional: Make the service request definitions available in Popular Service Requests of self-service.
- Optional: Create an approval process for the Incident object to set up an approval mechanism from the service requests that are created in BMC Remedyforce.

For more details on how to configure and support the Remedyforce Service Request Management Module, go to Creating and Configuring an SRD section of the BMC Remedyforce Administrator's Guide. The Administrator's Guide can be downloaded by going to the following webpage→ https://docs.bmc.com/docs/display/public/remforce201501/PDFs.

Best Practices

Setting up service requests in Remedyforce requires some forethought and planning. There are several parts to a service request that are required to provide a robust and stable solution to your end users.

Let's start with some basic pre-requisites:

- **Outline the overall workflows for Service Request Management.** If you have just started developing your processes and need assistance, you can leverage the out-of-the-box processes found within the Alignability Process Model.

- **Define your service catalog.** The service catalog breaks down your IT Services organization into top level services (business or technical) and the child services (service offerings). A service catalog allows you to organize the services you are providing to your customers. Think of it as a menu at restaurant and the items on the menu being the services your organization provides to the end users.

- **Create templates.** Incident templates are used to pre-populate the incident form with common fields. For example, the queue which will fulfill this service request, along with impact and urgency and a brief description should be in your template.

- **Define information needed from the requestor.** This will vary based on the service request you are designing. If it's a password reset, the data you need could be as simple as the userid and the system name for the password reset. If it's a request for new hardware, the information you need could be more complex, asking for business justification, model, accessories, and perhaps even including an attached approval process.

Here are some useful recommendations or things to take into consideration when configuring the Service Request Management module:
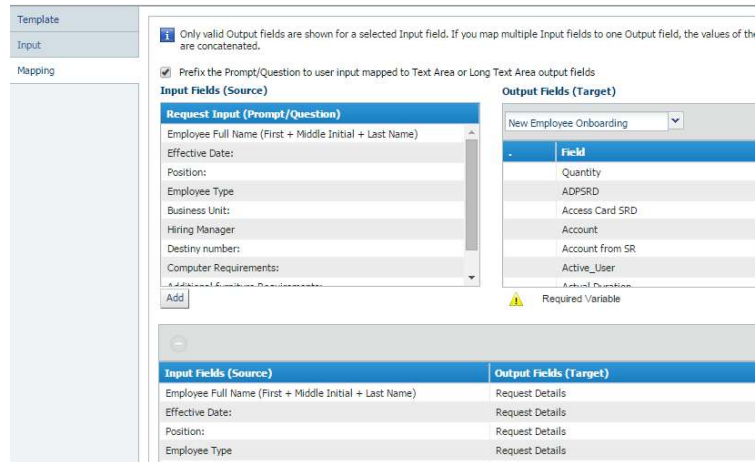
Service Request category: Every service request is associated with the primary category. Service Request are listed based on categories on self-service so make sure that you select appropriate categories for service request. This will increase the usability. Try not to create children and link service request at the top level. Remember, you can keep service request category separate from Incident Categories.

In the example below, Human Resources shows all the forms associated with Primary category - Human Resources
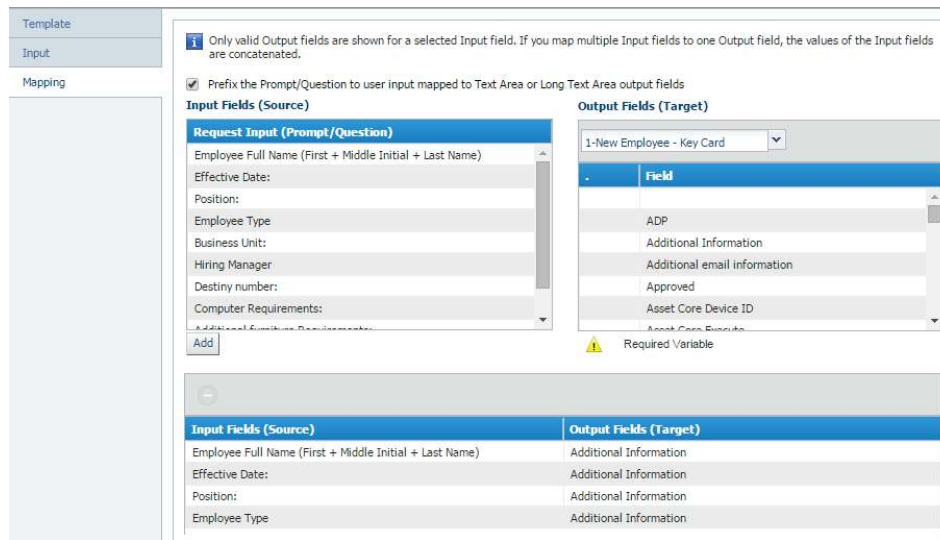
Service Request inputs and mapping

Mapping of service request inputs to templates is very crucial. For example, instead of clicking on icon next to service request on the form you may like to map all question and answers in another custom filed like "Request Details" on incident form instead of using the description. This way you keep description field intact for "work instructions or troubleshooting" which could be populated with fix work instructions/explanation in template. Make sure you check "Prefix the Prompt/Question to user input mapped to Text Area or Long Text Area output fields". Service Request inputs would always be on the console form for reference. Above all, make it easy to read.

Mapping of data on the tasks

You should map appropriate content or all details on tasks which are invoked from the service requests. This way you can make it very simple for the task owner to get all details without going to primary incidents all the time.

Use invoke task option

You can utilize the invoke template function for just creating tasks based on inputs selected. For example, you may like to create the task for "Desktop" only when desktop is selected.
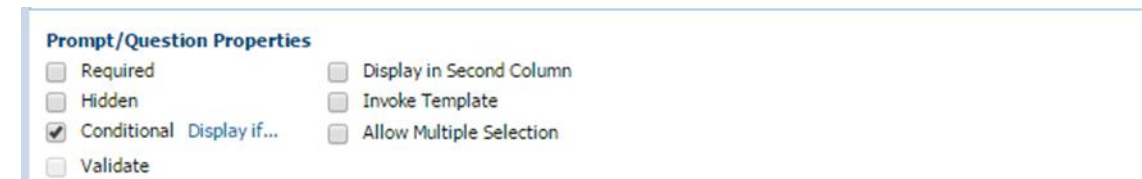
Use the ability to show fields dynamically based on previous questions on the form

Remedyforce service requests provides powerful functionality of showing the next set of questions based on previous question. This way you can prompt user with all the questions. This makes the form very dynamic.

Use pick lists instead of check boxes

Check boxes store the values as True or False so you can use the pick list in the same way that you would indicate Yes and No. Check boxes cannot be made required using service request configuration. However, you can always map them to a custom Boolean filed and write a validation rule.

Reporting

If you would like to report on the data you capture, make sure that you create custom fields in the incident object and use the mapping. Out of the box, if you do not map data to custom fields, you cannot get reportable data. It is a best practice to do mapping to individual fields if you need a specific type of report based on specific input fields of the service request form.

The service request reports can be created using below out-of-the-box report types:

- Incidents with service request report type
- Request Detail Inputs

Approvals

Service Requests can be submitted for approvals.

- If you select the "Automatically submit the record for approvals" on service request configuration, then make sure that you check the "approved" check box and set it True in your final approval steps or your approver process.
- Also make sure that Record Creator is part of initial submitters.
- Associate task templates directly to incident templates if they could be created without approval and you need some to be created after approvals.
- You can use user look ups for manual approvals.

Tasks templates

Make sure that task templates have appropriate work instructions and owner. Follow the standard in naming your templates. You will have lot of task templates. If you follow the standard naming practice, it will be easy to find and change if needed.

Task and Incident hyperlink

To help you toggle between tasks and the linked incident ticket, we recommend you add the hyperlink link to the service request on tasks. This way the task owner can open the incident in a click. To enable this, create the following formula filed in task object and add it to filed sets:

BMCServiceDesk__FKIncident__r.BMCServiceDesk__Launch_console__c

The following is how it would like once it is enabled:

| Parent Incident | 00000155 | | Incident | 00000155 | |
| Problem | | | Release | | |

Ordering task execution

If you need to execute child tickets in specific order, then use order execution. For example, in a new hire process you may not like to create a "configure laptop" task unless the Active Directory account is already created. The service request has a feature called **execution order**. This permits you to set the execution order of tasks and the next task would be only created if first one is closed.
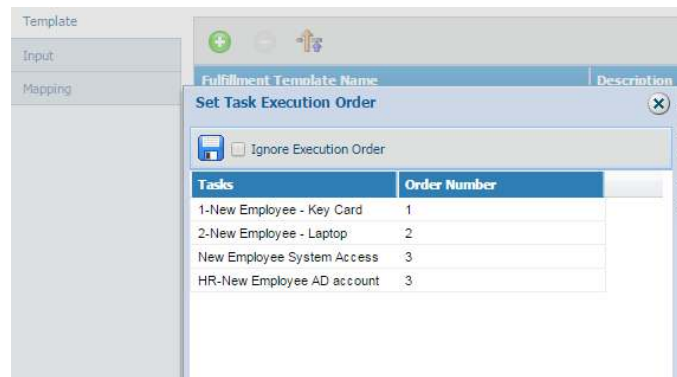
Look up fields and look up filters

This is one of the greatest features where you can use look up fields. For example, manager for approval could be looked up by "user object " and then use look up filters to reduce the list instead of showing all users.

Recommended work flow rules

It is important to communicate end user when specific action on service request occurs. This way end user or the client knows the progress of service request. Also, the owner of service request may need timely updates for example service request may have multiple tasks when each piece is completed owner should be notified and when final task is closed the owner or client could be notified so that they are aware of progress. Below are some great out of box rules related to service request module, you can use this or customize by cloning as per your need. You can also add alert for approvals in approval process final actions if your service request required approvals.

Rule	Object	Information
Service Request created	Incident	Notifies client when new service request is created. This is primary acknowledgement email
Service Request closed	Incident	Notifies client when new service request is closed. This helps to understand that all requests are processed
Service Request re-opened	Incident	In case of service request record was opened, send alert to client.
Notify incident owner when each linked task is closed	Incident	Notifies the incident owner when each task associated with the incident is closed. Helps to track progress from different teams involved in provisioning the request.
Notify incident owner when final task linked to incident is closed	Incident	Notifies the user to whom an incident is assigned that the last task that was associated with the incident is closed. This way they can inform end or close or mark this service request completed.
Notify the client when a service request status is changed	Incident	Notifies the client that the client's service request status has changed. This way client can get the status of the service request without calling helpdesk.

Update time to the correct time zone

Do not forget to update the time in service request template, it shows time in GMT.

```
Use below:
<tr>
 <td >Open Date:</td>
 <td> <apex:outputText value="{0,date,MM/dd/yyyy h:m a}">
  <apex:param value="{!relatedto.BMCServiceDesk__openDateTime__c - (5/24)}" />
 </apex:outputText></td>
</tr>
```

Formatting the layouts

Use appropriate headers to separate form sections. Remember you can also use "header" type filed just to show message. Take advantage of "display in second column".

Use of icons on service request

Make sure you add appropriate icons for service requests. This way form will be more user friendly and self-service users can actually recall the forms by looking at that picture.

Common service requests in self-service

Take an advantage of the common service requests feature on self-service by adding them based on usage or popularity.
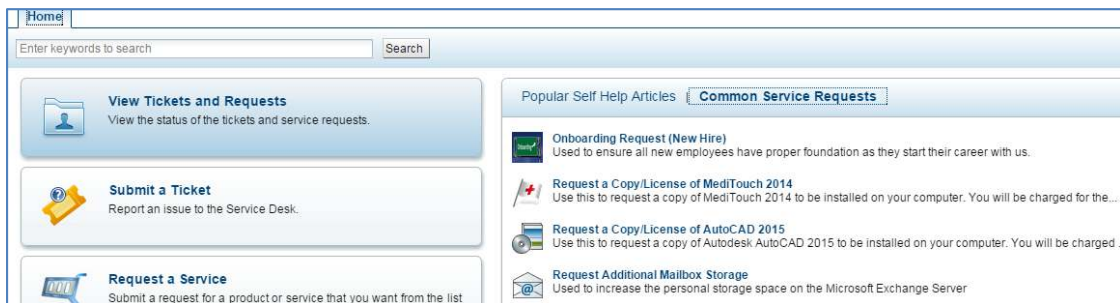
Preview and instructions

Use preview and instruction to give more details on what had to be done on the form.
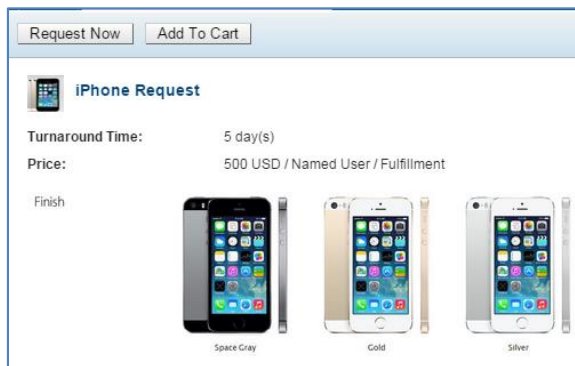
Service Request based on business services

A client or an account can be associated with multiple services. Similarly, a request definition is linked with a service. The associated service request can be searched on the basis of client or account services. You can use suggested service request option based on business receives linked to logged in user.

Use the following option:

Service Request entitlements

Entitlements determine what service requests should be shown to whom. For example, termination or HR forms should be shown to only hiring managers or the HR team. Make use of the service request sharing based entitlements.

"Options" configuration in Service Request configuration

Options give the ability to configure certain information per service request basis. If you want to show instructions, attachments, and "Assigned To" information, then make sure you select appropriate check boxes here:

Service Request on self-service app

Service Requests are also available in the Remedyforce self-service app. You can pick and choose what should be shown on the app based on checking/unchecking the box in Service Request configuration.

In Summary

BMC Remedyforce Service Request Management enables your end users/clients to submit requests. This capability can provide value by improving employee productivity and increasing both customer and employee satisfaction. We encourage you to check out our very active user community to get involved with additional discussions on this topic, or engage with our product teams to recommend feature enhancements to the solution. Please visit us at bmc.com/communities.

BMC delivers software solutions that help IT transform digital enterprises for the ultimate competitive business advantage. We have worked with thousands of leading companies to create and deliver powerful IT management services. From mainframe to cloud to mobile, we pair high-speed digital innovation with robust IT industrialization—allowing our customers to provide amazing user experiences with optimized IT performance, cost, compliance, and productivity. We believe that technology is the heart of every business, and that IT drives business to the digital age.

BMC – Bring IT to Life.