

BMC FootPrints: Leveraging Your IT
Service Management Solution for
Business Process Automation

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EXECUTIVE SUMMARY

Today, IT organizations in most industries are experiencing an increase in demand from other departments — such as human resources (HR), facilities, legal, financial, and training — for help in automating business processes. The problem is that traditional business process automation tools are specialized, having been developed to meet the needs of specific departments. Consequently, IT would have to acquire, maintain, and support multiple business process automation tools from multiple vendors to meet the needs of diverse departments.

That's an expensive proposition. Traditional tools often require highly analytical, engineering-like resources to implement. Those resources may not be readily available within the organization. Often these tools require outside consulting. The result is considerable expense and a long time to value. In addition, most tools are rigid and difficult to modify and update, especially if they include customized interfaces with other systems. That difficulty impedes IT's agility in meeting rapidly changing business conditions. What's more, multiple tools mean multiple skill sets, driving up costs even more.

So how do you respond to requests for business automation without incurring high costs and long implementation cycles? BMC provides a solution — BMC FootPrints. The same proven BMC FootPrints IT Service Management platform that orchestrates and automates your IT processes can also orchestrate and automate other business processes, as well. As a result, you can meet the process automation needs of both the business and IT with a single, unified solution.

With BMC FootPrints, you don't need expensive programming or consulting to automate business processes. The solutions' numerous out-of-the-box templates implement best-practice processes for a wide variety of business purposes, so you'll be up and running quickly. Moreover, it's easy to customize processes to meet the unique requirements of each department. Administrators can tailor processes using simple drag-and-drop actions.

The benefits are compelling, and include lower cost and faster time to value. What's more, you can implement and automate end-to-end business processes that span multiple departments, so you'll improve communication and collaboration across the enterprise.

INCREASING NEED FOR BUSINESS PROCESS AUTOMATION

The number of requests for automating business processes is skyrocketing. Department managers are eager to take advantage of the benefits, which include:

- » Higher quality service. Automation enforces the consistent use of best practices. That ensures speedy and accurate service delivery to both internal and external customers.
- » Lower operating costs. Automation boosts employee productivity and enables internal and external customers to serve themselves.
- » Greater business agility. Automation permits faster modification to processes, enabling business units to quickly adapt to changes in the business environment.

Traditional business process automation tools can deliver some of these benefits. These tools, however, have significant drawbacks. They are costly and time consuming to implement, and difficult to use. Because they are specialized, you have to implement and support multiple tools from multiple vendors to satisfy the needs of multiple departments. The result is higher acquisition, maintenance, and support costs. Moreover, there is little or no integration among tools, so it's difficult to implement end-to-end business processes that span multiple groups.

LEVERAGING IT SERVICE MANAGEMENT SOLUTIONS TO AUTOMATE BUSINESS PROCESSES

Most IT departments are already taking advantage of IT service management solutions to orchestrate and automate IT processes. As a result, they have greatly enhanced efficiency in managing incidents and problems, infrastructure changes, configuration, compliance, security, and assets.

Some IT departments have orchestrated and automated entire end-to-end IT processes that span multiple groups and involve both manual and automated tasks. Here's an example:

An employee contacts the IT service desk and requests access to Adobe Reader. (The request process can be automated with a service catalog.) Processing this request requires performing and tracking several steps across multiple groups. The service desk technician opens an incident ticket in the IT service management system and generates a change request. The system forwards the change request to the change management team, tracks the request status, and maintains an audit trail of all relevant activities.

The change management team queries the system to ensure that the requestor is entitled to access the requested application. (This could be done automatically by a role-oriented service catalog.) The system then automatically gathers all required approvals. When the approvals are received, the change management team requests the operations team to install the requested application on the user's desktop. The system then automatically tracks progress, verifies successful installation, completes the change request, reports the resolution to the service desk, and closes the incident ticket.

There is marked similarity between IT processes and the business processes of other departments. Because of this similarity, IT service management solutions can also extend to automating business processes outside the IT department. For example, the IT process just described consists of accepting a request, verifying the entitlement of the requestor, gathering the required approvals, fulfilling the request, verifying successful fulfillment, creating an audit trail, and tracking and reporting the status.

This service request and fulfillment process is common to many other departments. Take, for example, the process employed by a facilities department when it receives a request from HR to provide office space, furniture, telephone, and IT equipment to a newly hired employee. The fulfillment process involves the coordination of tasks across multiple groups, including HR, facilities, telecommunications, and IT.

Using a single process automation tool for multiple departments has many benefits. It's far less costly to acquire, deploy, maintain, and support a single solution from a single vendor than multiple solutions from multiple vendors. What's more, a single solution requires only a single skill set to manage and use. It also enables better communication and closer collaboration among groups. That's because, unlike multiple, siloed process automation tools, a single, unified solution permits the integration of processes and the sharing of information across departments.

REQUIREMENTS FOR A SOLUTION

Not every IT service management solution can readily address the process automation needs of non-IT departments. To meet those needs, a solution must not only deliver strong IT service management functionality, but also meet a number of additional stringent requirements.

FLEXIBLE AND ROBUST PLATFORM

Business users need flexibility so they can adapt a solution to their unique requirements. That makes a flexible platform an essential component of an effective business process automation solution. A flexible platform allows business users to implement custom business processes and not force users to choose from a limited number of plug-ins.

The solution must provide a comprehensive process automation infrastructure that includes not only rules-based workflow orchestration and automation, but also customized forms creation, dashboarding, reporting, and calendaring. Most important, the solution must allow nontechnical business users to easily define, manage, change, and update automated business processes. For example, a user should be able to define or change the data that internal or external customers are allowed to access and what functions they are allowed to invoke. In no case should programming, scripting, or pseudo-coding be required.

SEPARATION BETWEEN USER GROUPS/DEPARTMENTS

Although the confidentiality and sensitivity of data may vary from one department to another, department managers are, and should be, protective of departmental data. To meet privacy needs, each department's information base must be kept completely separate from those of other departments. Maintaining separate records within a common database isn't enough. An effective solution must create an entirely separate database for each department.

It's essential that each department have the flexibility to specify the structure of its private environment. However, if creating that structure is too complex for business users, the burden on IT will increase. Therefore, the ideal solution insulates business users from the complexity of creating a new private space. Furthermore, while a department might solicit IT's help in creating the private space, the department must retain ownership and management of it.

Protecting private data is vital. At the same time, there are many reasons for sharing certain information across departments. An effective solution, therefore, enables sharing of authorized data across private spaces so that companies can create business processes that span multiple departments. Sharing permits better communication and closer collaboration across departments.

Finally, the ability to access data from external sources is highly beneficial. For example, automatically granting access to the financial department's space based on employee role requires access to employee role information, which is usually stored in an external HR database. Accessing external data should not require replication of the data in the business process automation solution. Instead, access should be achieved using a service-oriented approach in which only the required data is accessed. Dynamic field mapping can accomplish this while also ensuring that data is kept up to date. Once again, simplicity is vital. It shouldn't take a database expert to map the desired fields. Business users should be able to do the job.

EASY CREATION OF CUSTOM FORMS

Forms are integral to most business processes. Consequently, the solution should allow the user to easily create customized forms. In no case should forms creation require programming or HTML skills.

A solution that includes a variety of configurable templates out-of-the-box gives users a head start on creating forms. Business users should be able to configure templates quickly, renaming existing fields and adding custom fields.

FLEXIBLE WORKFLOW ORCHESTRATION

Workflows often involve both automatic and manual procedures, and an effective solution must be capable of orchestrating and managing both. The on-boarding process for a new employee is a good example. Automatic procedures in the on-boarding process include:

- » Validating entitlements based on user role
- » Gathering approvals
- » Assigning manual tasks to responsible people, tracking progress, and when necessary, escalating through various notification mechanisms
- » Granting access privileges to applications and data based on employee's role

Manual procedures in the on-boarding process include:

- » Creating employee identification badges
- » Assigning and preparing office space
- » Installing office furniture, telephone, and computer equipment

Users should be able to specify and automate workflow based on rules. This includes rules that specify such items as task assignment, escalation and notification conditions, approval requirements, and IT service access permissions. The solution should also provide the ability to establish service level agreements (SLAs) and track performance against them. For example, an SLA might specify that a request to onboard a new employee must receive a response within 24 hours and be fulfilled within seven days.

Above all, the specification of workflow orchestration and automaton should be easy to accomplish by business users and not require scripting or programming.

COMPREHENSIVE DASHBOARDING AND REPORTING

Real-time data and historical information are valuable to managers in assessing departmental performance and making improvements that drive efficiency. Consequently, the solution should provide real-time dashboards and historical reporting.

Dashboards indicate the current status of processes, enabling managers to spot problems at a glance and move proactively to address them. Dashboards can also keep requestors informed of the status of their requests. The solution should be capable of automatically triggering notification and escalation procedures if a process has exceeded preset thresholds, such as those specified by SLAs.

Historical reports that are automatically generated and distributed serve a number of purposes. For example, they support the analysis of trends, such as the steady increase of incoming call volume to the service desk. Business users should be able to tailor reports to include custom fields, as well as change standard fields. Report generation should not require expertise in report writers, such as Crystal.

Reports and dashboards must provide actionable information and allow easy drill-down to gather additional details. That enables users to focus on specific items, such as requests, incidents, problems, and service levels, when issues arise.

EFFECTIVE KNOWLEDGE MANAGEMENT

Capturing and sharing knowledge is a key requirement for an IT service management solution. A problem solution knowledge base, for example, permits support technicians to quickly find fixes and workarounds to frequently reported problems.

A knowledgebase is also a requirement for business process automation. Departments should be able to capture and add knowledge in a controlled manner. Subject matter experts should be able to easily contribute to the knowledgebase. Fast retrieval of information from the knowledge base is also an important consideration.

FLEXIBLE CUSTOMER PORTAL

A primary reason for business process automation is to improve service to a department's customers, whether they are internal or external customers. Customers may use the system in a variety of ways, such as requesting services, making inquiries, and reporting problems. A solution should enable these interactions with a self-service portal that guides customers with easy-to-follow forms.

Some departments may require the ability to configure a customer portal with a service catalog. A catalog permits users to serve themselves, selecting from a list of services available to them based on their role. The catalog may also present service attributes, such as costs, delivery times, and service level options.

Driven by the consumerization of IT, today's users and customers — especially younger ones — expect to be able access services from a variety of mobile devices in addition to their desktop computers. Be sure that the solution you select meets this demand.

EASY UPGRADES

Software vendors continually update their offerings to add new functionality and to resolve problems. You need to be able to roll out these updates quickly. Business process automation software is no exception.

By using a single solution for all business process automation, you minimize the upgrade burden. Instead of updating separate solutions for different departments, you need to upgrade only one solution. Of course, that solution must be painless to upgrade. The upgrade process should be completely transparent to users and customers. The only difference they should see is the availability of enhanced functionality.

An easy upgrade is one that doesn't disrupt your current environment or break your current processes. That means the solution must carry forward all your processes, including all customizations and data, with every update. In no case should you have to re-implement items. Before choosing a solution, check the vendor's reputation and history with respect to upgrades.

THE BMC SOLUTION

BMC FootPrints has long been recognized as a leading IT service management solution. BMC FootPrints is the first and only solution that integrates IT service management with endpoint management. It supports the automation of end-to-end IT service management processes that transcend multiple IT groups, including service desk, change management, and IT operations management. The solution also supports endpoint management of physical, virtual, and mobile devices. All access is from a single pane of glass using an intuitive web browser.

As Figure 1 illustrates, the value of BMC FootPrints extends well beyond the automation and management of IT processes. BMC has helped its customers exploit this value by automating a wide variety of other business processes. In many cases, BMC customers have discovered innovative new uses of BMC FootPrints in business process automation on their own.

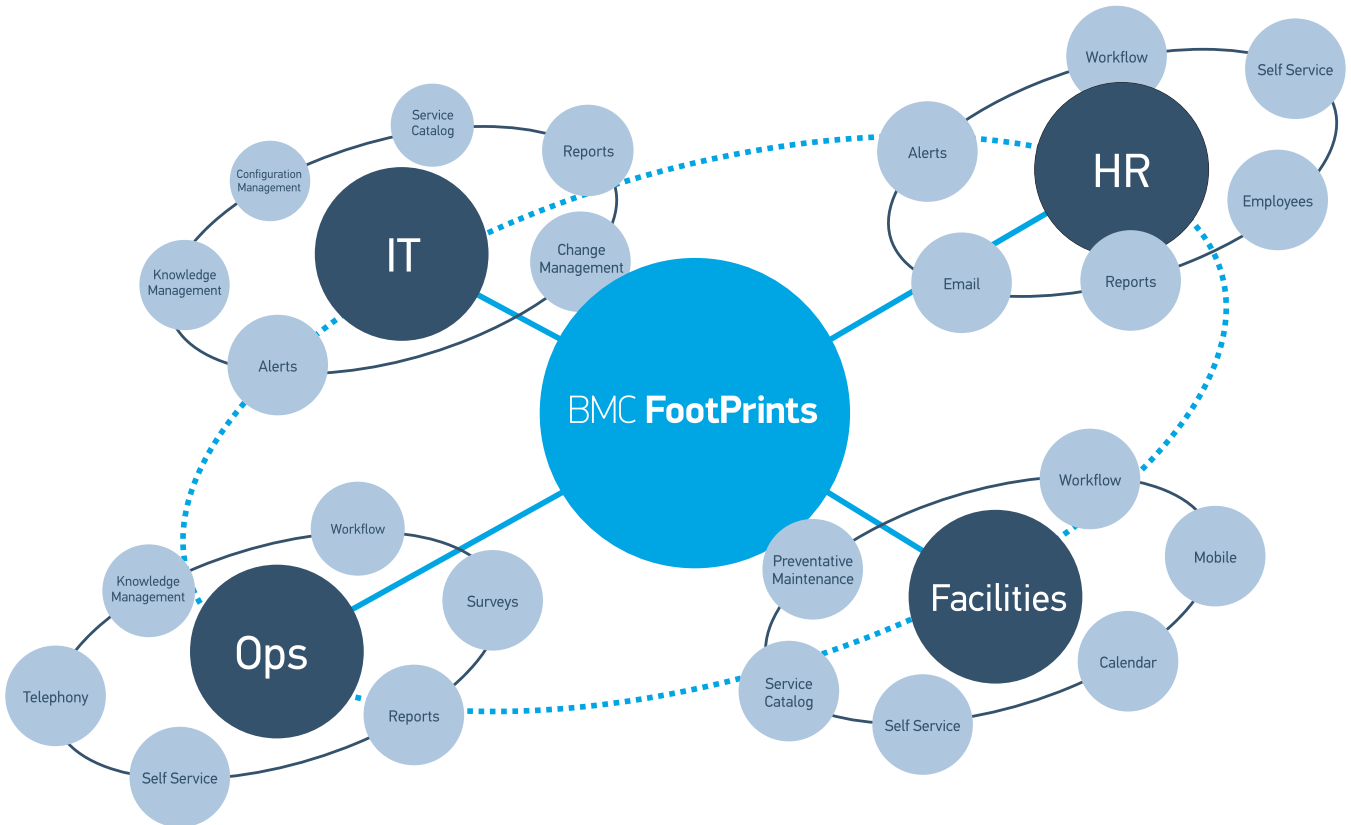


Figure 1. BMC FootPrints automates IT as well as other business processes.

BMC FootPrints meets the requirements of a variety of functions in any organization, regardless of industry vertical.

BUILT ON THE WORKSPACE CONCEPT

With BMC FootPrints, departments create self-contained environments, called workspaces, in which they implement their business process automation. Each workspace has its own fields, forms, reports, dashboards, workflows, settings, and customer portals. Each workspace also has its own independent information base.

Workspaces permit true separation of user groups to ensure privacy and security. As Figure 2 shows, employees who “wear multiple hats” can access multiple workspaces — all from a single pane of glass. As a result, users don’t require multiple skills to take advantage of multiple areas of process automation.

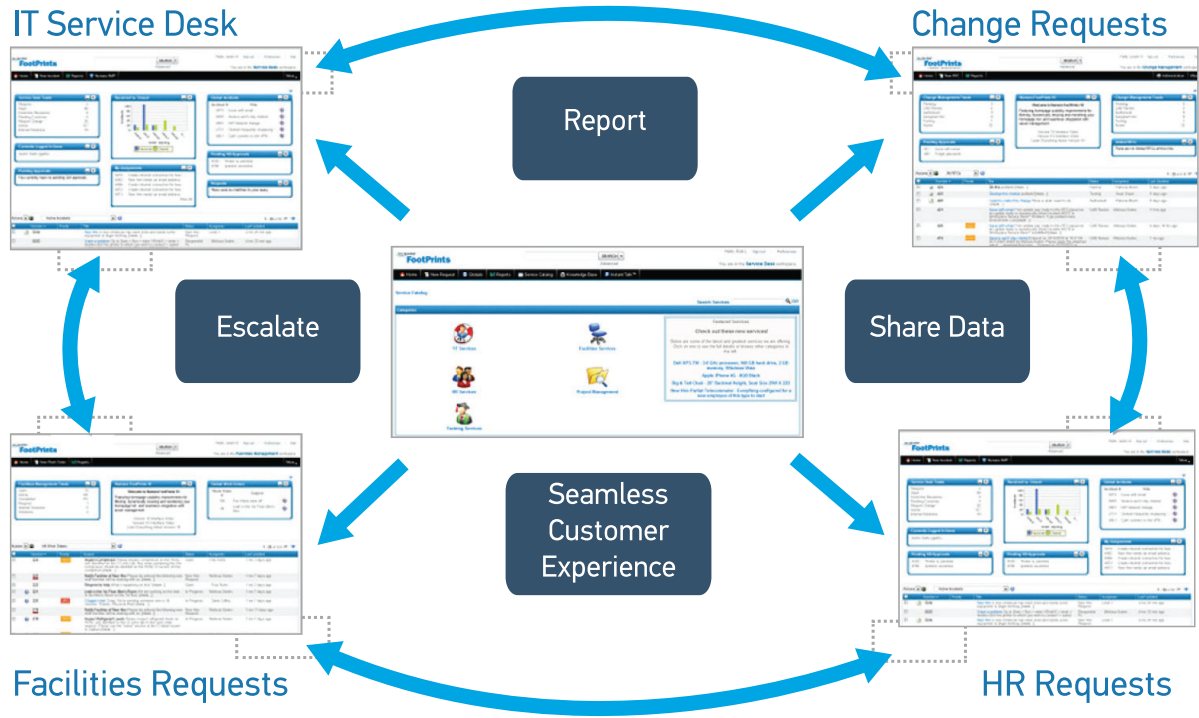


Figure 2. Access multiple workspaces from a single point

In addition, users can share data and integrate processes across workspaces. As such, they can implement higher-level, end-to-end processes — for example, on boarding a new hire — that involve the participation of multiple departments.

NO SPECIAL SKILLS REQUIRED

No programming or scripting skills are required to create workspaces and all associated forms, reports, dashboards, and other components. Users work from a modern, intuitive GUI using straightforward drag-and-drop actions.

Out-of-the-box templates give users a head start for fast time to value. These templates support a wide variety of business processes. Table 1 lists some of the processes included. You can easily customize these processes using drag and drop. And you can easily update them to meet changing business needs.

Table 1. Out-of-the-box templates support a variety of processes

Corporate service desk	IT service management
Customer support	Asset requisitioning
Change and release management	Survey
Sarbanes-Oxley (SOX) financial control management	Sarbanes-Oxley (SOX) financial control management
IT outsourcing	HIPAA patient management
Facilities management	Human resources management
Service desk	Problem management
Service portfolio	Issue tracking
Resource management	Sales tracking
Software change management	Training

ACCESS FROM ANYWHERE USING ANY DEVICE

All access to the system is through the familiar web browser. The solution supports laptops, smart phones, and tablets, as well as desktops. Therefore, departmental users can access their workspaces and customers can conduct transactions at any time from anyplace — all using the devices of their choice.

Not only does BMC FootPrints extend access to mobile devices, it also enables IT to perform full lifecycle management of those devices using integrated asset management capabilities. With the advanced BMC FootPrints solution, IT can secure, manage, and support a variety of mobile devices, including iOS, Blackberry, Windows Mobile, Symbian, and Android devices.

BMC FootPrints also enables departments to publish a catalog that lists the services offered along with attributes describing the services, such as cost, service levels, and delivery time. A service catalog permits users to serve themselves, reducing the load on the service desk.

REAL-WORLD EXAMPLES

Many of BMC's clients are already taking advantage of BMC FootPrints to automate their business processes and are realizing substantial benefits.

PC MALL

PC Mall is a large technology reseller that markets computer hardware, software, and peripherals, as well as other consumer electronics products and services to a global market. The company experienced explosive growth that doubled the number of sales account executives. The challenge was to effectively manage sales support in an increasingly complex sales environment, while maintaining its aggressive pricing model and profit margins. To meet the challenge, PC Mall established a virtual sales support center — the Sales Resource Center (SRC). The SRC supports a range of sales-related activities that include bid creation and sales pipeline management.

The company selected BMC FootPrints as the underlying technology platform behind the SRC and several IT-led initiatives that included a centralized IT service desk and a formal change management program. In addition, the company is utilizing BMC FootPrints for automating HR hire-in procedures. The results have been compelling and include:

- » Improved open-bid win rates
- » Higher profits and higher per-deal margins through improved sales process management
- » Lower manufacturer pricing
- » User approval rating of 94 percent
- » Greater agility of IT to meet business demands through improved change management

EVERGREEN

Evergreen Packaging is a leading producer of commercial printing, writing papers, liquid packaging, and coated bleached board for food service packaging. The company has six facilities in the U.S. that are spread across five states. The company had outgrown its homegrown service desk solution and needed a more robust solution that would enable IT to centrally manage all incoming IT service and support inquiries from employees, and share information across all six of its locations. In addition, they wanted a solution that could help in Sarbanes-Oxley (SOX) compliance tracking and reporting.

The company opted for BMC FootPrints because of its comprehensive feature set, multi-project support, and low cost of ownership. Evergreen has since expanded the use of BMC FootPrints to other business processes that include product development, sales tracking, and human resources. The results are significant and include:

- » Savings of nearly \$350,000 by eliminating the need for a \$145,000 CRM project and a \$200,000 HR system
- » Improved workflow and collaboration among employees
- » Elimination of paper forms for such purposes as corrective action, returned goods authorization, and credit request
- » Doubling of first-call resolution rate (was 20 to 30 percent, is now 60 to 70 percent)

CONCLUSION

To excel in an increasingly competitive business environment, organizations need to automate business processes wherever possible. They are looking to IT for help. Traditional business process automation tools, however, are difficult and expensive to implement, maintain, support, and use. What's more, they are typically siloed by business function. As a result, multiple tools are required to meet the needs of multiple departments. This not only drives up costs but also hampers the ability to automate end-to-end business processes that span multiple functions and departments.

BMC FootPrints provides a solution. This field-proven IT service management solution offers extensive business process automation functionality that extends well beyond IT processes. With BMC FootPrints, you can respond quickly and effectively to the need for business process automation. And you can do it with a single, unified solution that permits business departments to achieve automation on their own.

With BMC FootPrints, IT and the business can work together to deliver higher-quality service to their customers at lower cost. Moreover, they will position themselves for the future with greater agility in adapting to changing conditions in the business environment.

FOR MORE INFORMATION

To learn more on BMC Track-It! and BMC FootPrints, please visit www.bmc.com/solutions/bsm/midmarket.html.

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