Categorization
Getting Started with Remedyforce Series

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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.

Categorization

To enable effective routing and reporting on the activities conducted by your Service Desk, you need to categorize the work being done. The approach you take to categorization has significant up and downstream effects, so you need to plan and prepare to create your categories with an understanding of how it will impact your effectiveness, efficiency and transparency – now, and in the future. It is fundamental to the success of your Service Desk. This white paper will provide you with guidance on how to get the most out of categorization in BMC Remedyforce.

Categorization: A named group of things that have something in common. Categories are used to group similar things together, usually to three or four levels of granularity. (Source: ITIL, v3)

Categorizing incidents, problems, changes and other process work allows two important functions to occur

- Routing of work to the part of the organization responsible
- Reporting of relevant data to the appropriate level of management

Categorization is, typically, the most “unique to you” aspect of the foundation configuration of your Service Desk to develop. Your categories need to reflect the type of services you deliver and your audience. To accomplish this, the category structure is often broken into different elements that start with a high level definition of services you provide to your end users and drills down to a level of specificity which allows you to definitively route or report on that element. This structure is hierarchical, and the elements are referred to as category tiers. From a process perspective it is important to ensure that the values of each category tier (category, type and item) are internally consistent and that duplication of the same data elements from one tier to another are limited, if used at all (e.g. it is bad to have laptop in both the type field and the item field). Failing to maintain consistency in the category tiers will result in a taxonomy and structure that will not provide the key benefits of good categorization; the ability to route and report on categorized records. Bear in mind that categorization is not just limited to one element of service management. You will use categorization in each facet of your service delivery. Consequently, proper categorization becomes one of the most important elements when configuring a service management system and it is important to establish a clear methodology which can be leveraged repeatedly within the system.

With the notion that categorization is “unique to you”, keep in mind that most organizations provide very similar IT Services. For example, all organizations provide hardware support as well as software support. We are moving towards a more self-service oriented environment and as such the category taxonomy should read more like a menu of service offerings and less like a technical list.

It is vital that the scope of categorization be limited to routing and reporting. Functions such as troubleshooting or asset management should not be entertained in the categorization. These considerations are addressed through other methods and processes.

Finally, categorization is a dynamic selection that may change over the lifecycle of a Service Desk record and, therefore, may need to be altered to reflect these changes. While initial categorization of a record is important, it is also important that the final state of the record’s category accurately reflect the true values in each tier for accurate reporting and metrics.
Categorization – Best Practices

Categorization is developed by creating a taxonomy in which each subsequent tier describes the previous tier in more specific detail. Typically we see this represented as a general category which identifies a service, the type category which usually identifies a subset of the general service, also known as a service offering and an item category which identifies a detail which is significant to reporting or routing.

When first establishing categorization taxonomy, it is advisable to set up a working group and develop an initial category set using methodology illustrated in the diagram above. Once the initial categories are set, you should socialize the results to other areas of the business for comments and incorporate their comments. Everyone will be sharing this methodology, so it’s important to have input and buy-in from all of the stakeholders. Evaluate the tier statements against a random sample of records in your existing process. This will ensure that you’ve created enough categories to effectively route and report on work, but not so many that you have unused categories that just take up space and add complexity. Finally, because offered and supported services and their elements frequently change over time, periodic reviews of category sets should be established.

The first step in triaging any customer interaction is to establish why the customer is contacting your service management team. This initial contact provides your agents with their first opportunity to categorize the customer’s need. This first effort is the initial state categorization and the more accurate this effort is the more quickly and effectively your team will be able to address the customer’s need through the proper routing of the record to the functional group responsible for the associated work. This ensures timely resolution of records and will result in achievement of the associated Service Level Target(s) established for the provided managed services.

Upon resolution of a record the agent responsible for closing the record should review the categorization to ensure that the final state of the categorization matches the true nature of the record. Often, the initial state categorization may not match the final state categorization. (For example, an end user may perceive an error in application behavior, when the true issue was with the network.) Proper final state categorization also allows a greater understanding for areas of improvement by allowing reporting on SLAs to help you identify improvements you can make to your process, based on which particular managed services are not meeting the defined Service Level Target(s). ITIL recommends that service providers utilize two sets of categorization: one for initial state categorization and one for final state categorization. However, the adoption of this practice depends on size and maturity of the organization and many organizations find this approach to be burdensome and utilize only one set of categorization.

By using a single set of categorizations, technicians can easily and more fluidly adapt to the change in categories if necessary; with the added benefit of not having to construct a separate taxonomy for a more “customer-facing” and easy to use hierarchy to be used in self-service.
Customer-Facing vs Agent-Facing Categorization:
Traditionally, when a customer portal is utilized, a separate set of categorization was utilized specifically for users. This taxonomy was intended to be friendlier to non-technical users and frequently posed as a question composed of relatable terms (e.g. I have a problem with my…pc/mobile device/software/etc.) Agent categorization managed the routing and reporting on work, and could be more technical in nature. Typically this view would not be visible to customers.

BMC recommends a more up to date approach in which a single taxonomy is created for both technicians and users. Using the organization’s service catalogue as a model, the taxonomy can be created to read much like a restaurant menu in which you have easy to interpret top level categories and under each you would have the service offering categories. This allows for leveraging use of the CMDB for the more granular information such as the affected application or the affected hardware which can be captured under a separate field and aids in decluttering the taxonomy. This set up satisfies the requirements for routing and reporting while significantly reducing the number of categories in your taxonomy and simplifies the creation of tickets from the technician and user perspective.

By utilizing the CMDB to house the list of applications and hardware, the taxonomy becomes more concise and clear. The CMDB then becomes the single source of truth for the applications and hardware that are supported along with other services. For long term administration, it reduces the overhead as the CMDB is the entity to be updated by simply adding a CI or retiring one; instead of having to modify the taxonomy which can potentially have duplication. In addition, keeping the taxonomy as static as possible makes for a more consistent learning curve for existing and new technicians alike.

Creating a services oriented taxonomy also puts technicians in the mindset of an end user, enabling them to have a clearer understanding of the end user experience. This knowledge can be leveraged to provide feedback into the business for continuous service improvement to provide a friendlier and easier to execute user experience.

Considerations for designing categories in Remedyforce
Consider all these before you finalize the design:
1. Self-service for Ticket /Incident
2. Self-service > Browsing service request is based on Categories. This is crucial for service request definition roll outs. User will see forms listed based on how the categories are associated.
3. Knowledge articles use categories and that is how they are listed for browsing.
4. Incidents, Task, Change Requests, Problems, Releases appearance on Remedyforce console.
5. You may need categories for auto routing workflows to certain groups.
6. You may use suggested owners based on category to assign experts and reduce confusion on whom to assign which issues.

Look up filter on category to filter unwanted categories on specific module
Look up filters functionality could be used for filtering categories on (for example) the change request module. Perhaps you just want to show the categories being used for Change Requests and not all categories listed under the incident module. You can do that using look up filters by adding the flag on category object and filtering based on that.

Look up filter on custom fields to streamline lists of applications and hardware
Custom fields can be created to display specific lists of software or hardware to fulfill granular requirements for reporting. For example, you could have a category that reads “End User Computing Services > Hardware Support”. This category tells us this is going to be for end user equipment and not enterprise equipment as well as it’s reporting an issue with the hardware as opposed to requesting additional hardware. Depending on the organization and their current state of asset tracking, the custom fields can display the specific list of laptops, computers, printers, etc. which will be fed into the CMDB, or it could just be a generic list that is populated into the CMDB until such time that more detailed information is imported. In either case, having that custom field separate allows for a single source of truth in terms of having an accurate up to date list of software and hardware.

By having custom fields with filters, the organization reduces the number of categories in the taxonomy and eliminates the need to have multiple sources for hardware and software inventory. It is however important to have a process in place that ensures the integrity of the information that is housed in the CMDB, without it the data can grow to be stale and the information in the tickets will be inaccurate which will lead to incorrect metrics and measurements.

Revise, revisit, and update your category tree
Review and update your tree structure periodically based on systems changes, new support areas, or issue types per month. Organizations change over time, and new organizational needs may not align with your old tree structure. That said, it is important not to allow random
changes or additions. Structural changes need to go through approval, or else your tree may eventually not add value. And remember to use your sandbox for proof of concepts and testing, and to get user feedback.

Make populating the category field mandatory
Even if you have a well-designed category tree, you may find staff and end users skipping this step. So, you should make populating the category field a requirement for both support staff and business users. Make this required on field sets instead of using validation rules.

Make the closure field a requirement
Closure is an important classification for reporting purposes. Move this field to an accessible location on the form and make it required before closing any record for staff. Closure information provides valuable trend data on how issues were closed. Keep in mind that Remedyforce has the closure field available out of the box, and that you can add or modify the values. You can use validation rules in this case as the value should be required just before closure.

Leverage category type for reporting and filtering
Lots of Remedyforce users may not take advantage of category type, but it is one of the powerful ways in Remedyforce to get data. You can think of category types as buckets to assign similar categories under one umbrella. For example, say that you need to generate a report where you would like to see all issues under the department "IT." You can create a category type called "IT" in Remedyforce, assign categories that belong to IT such as hardware, software, etc., and use it to generate the report you need. You can also add other common virtual buckets such as IT, Admin, HR, facilities and more.

Filtering categories under separate objects will become more straight-forward as well as some of the buckets can be labeled for Problem, Change, Release, etc. Thus allowing the organization to display categories in objects based on category type.

Filter out deactivated categories for better reporting
Remember that if you deactivate any categories, you need to add a filter to omit those categories in report data. Keep in mind that this might also affect historical reporting. So when creating reports keep your scope in mind: "Is this report for current tickets?" "Is this report for historical tickets?"

Show category path/tree on console if you would like to see CTI details (Parent Child details)
Add formula field to show the complete category tree path when child categories are selected.

```
BMCServiceDesk__FKCategory__r.BMCServiceDesk__parentTree__c
```

Always deactivate categories, never delete
Do not delete categories or you may lose data integrity for historical reporting.
Categorization – Application in BMC Remedyforce

Within the BMC Remedyforce application categorization has its own Custom Object in the database which is leveraged by multiple other Objects in the database (Incident, Problem, Change, Release and Task). This means that categories are often segregated depending on which associated ITSM process area uses which elements of the taxonomy. This separation allows you to use different category trees for different areas of your service delivery organization; being able to tailor a category structure for each process area as necessary. This gives your organization a great deal of flexibility when establishing a category structure and taxonomy.

This structure inside of the database also allows for Customer facing categorization to be incorporated as well. The ability for BMC Remedyforce to utilize workflows to automatically route or re-categorize tickets means that end-users can select from a more “customer friendly” taxonomy which can automatically be re-categorized by a workflow trigger to fit into an appropriate structure for an IT organization. Workflows can also automatically route tickets to the appropriate support group based on categorization.

Categorization can also help prioritize a ticket. If a particular category is associated with a business service or area deemed critical to the organization, the priority of the ticket can be elevated by BMC Remedyforce through automation. This can be especially useful when receiving ticket information from an automated source such as monitoring or asset management software, allowing for rapid notification of responsible parties, tracking of the duration of the outage and faster resolution times.

Categorization – Configuration Steps

Categories allow you to create classifications for the data that you want to group or track for reporting purposes. You can organize your data by using category types and defining parent and child relationships between categories. Plan your categories so that the data in your system is consistent. To setup categories in your BMC Remedyforce org:

1) Click the Remedyforce Administration tab.
2) On the Home page, click the Configure Application tile, and from the menu select Category.
3) In the categories list view, click New.

*If you are creating a category for Self Service and you have accessed the Category option from the Configure Self Service tile, only the categories that can be shown in Self Service are listed.*

*See Figure 2 – Illustrative Example of New Category Field*
4) In the Category field, type a name of the category.

5) In the Abbreviation field, type a short label that you want to assign to the category.
   When you create charts or reports, you can use this field to represent the current action record in the chart or report. The field uses minimal screen space, which allows you to display more data in a chart or report.

6) From the Category Type list, select the type of category.

7) From the Parent Category list, select the category that can be designated as the parent category.
   Assigning a parent category to a category creates the category tree.

**NOTE:** BMC recommends that you assign a parent category that is of the same type as the current category. For example, if you select the Available for Incidents check box for the current category, assign an Incident category as the parent category.

8) To help the users to select the appropriate category from the category tree, in the Category Description field, type a description of the category.
   This text appears as a tooltip when you move your mouse over a category in the category tree in the Salesforce page layout, console layout, and Self Service 2.0.

9) To designate the category as available to Incident Management, select the Available for Incidents check box.
NOTE: If you select the Available for Service Requests and the Available for Incidents check boxes for a category, the category is available to both Incident Management and Service Request Management. This category is available for defining the Conditional and Invoke Template properties of Input fields.

When you select this check box, the following sections are affected:

- In the Incident form, when the staff member clicks the Category list to open the Select From Categories window, the category appears in this window by default. If the staff member wants to select a Service Request category for the incident, the staff member needs to select Filter Options > Service Request Categories to view the Service Request categories.

- In the Incident form, when the staff member types the current category in the Category list, the current category appears in the list of matching entries. Service Request categories do not appear in the list of matching entries.

- In Self Service, when the client user clicks the Submit a Ticket link and then click the Category list to open the Select From Categories window, the current category appears in this window. The Display in Self Service check box must be selected for the current category to appear in Self Service.

- In Self Service, when the client user clicks the Request a Service tab, the current category does not appear in the Category tree. Incident categories appear in the Category tree if they are parent categories to Service Request categories. The Display in Self Service check box must be selected for the current category to appear in Self Service.

![Additional Settings for Category](image)

Figure 8 – Additional Settings for Category

10) To designate the category as available to Service Request Management, select the Available for Service Requests check box.

When you select the Available for Service Requests check box, BMC Remedyforce selects the Display in Self Service check box. In most cases, you want the Service Request categories to be displayed in Self Service. Self Service clients can use these categories when they are creating service requests. You can clear the Display in Self Service check box if you do not want the category to appear in Self Service.

When you select this check box, the following sections are affected:
In the Request Definition form, when you click the Category list to open the Select From Categories window, the current category appears in this window by default. Incident categories appear in this window if they are parent categories to Service Request categories.

On the Fulfillment tab of the Request Definition form, only Service Request categories are available for defining the Conditional and Invoke Template properties of Input fields.

In Self Service, when the client user clicks the Submit a Ticket link and then clicks the Category list to open the Select From Categories window, Service Request categories are not displayed in this window.

In Self Service, when the client user clicks the Request a Service tab, the current category appears in the Category tree. The Display in Self Service check box must be selected for the current category to appear in Self Service.

While submitting a service request in Self Service or BMC Remedyforce, if you click an Input field that is a lookup to the Category field, the current category appears in the Select From Categories window. The Display in Self Service check box must be selected for the current category to appear in Self Service.

11) To display the category to all the users of BMC Remedyforce when they log on to Self Service, select the Display in Self Service check box.

If the Display in Self Service check box is selected for child categories of current category and you clear this check box for the current category, an error message appears when you save the current category. The Display in Self Service check box must remain selected for the current category because child categories of the current category are displayed in Self Service and the current category is required to create the Category tree. When you select the Display in Self Service check box for the current category and save the category, this check box is selected for the parent categories of the current category.

For example, you have the following categories:

- Human Resource
- Recruitment
- Interview

Human Resource is the parent category of Recruitment, and Recruitment is the parent category of Interview. When you select the Display in Self Service check box for the Interview category, this check box is selected for the Human Resource and Recruitment parent categories.

NOTE: All categories are available in the Change Request, Broadcast, Problem, Template, Task, and Release forms. The Filter options menu does not appear in these forms when you are selecting a category. Selecting the Available for Incidents, Available for Service Requests, or Display in Self Service check boxes does not affect the availability of categories in these forms.

12) In the Incident Handling Information section, enter the following information:

- Follow Up—Select this check box to designate incidents for follow-up when the category is assigned to an incident.

  These incidents are followed up when the incident is closed. You can define the follow-up time in the After Hours field.

- After Hours—Type the number of hours after an incident is closed when a follow-up should begin.
This information is added to the closing data of an incident assigned with the category.

- Urgency ID—Select the urgency that you want to assign when creating an incident with the category. You can assign a level of urgency to the category depending on the importance of the category.

13) In the Supporting Information section, click the Child Categories tab.

- In the Child Categories tab, click Actions > Add.
- In the Categories window, repeat step 4 through step 16 to create the category that you want to add as a child category to this category.
- Click Save.

The Categories window closes, and the child category appears on the Child Categories tab.

14) In the Supporting Information section, click the Standard Descriptions tab.

- In the Standard Descriptions tab, click Actions > Add.
- In the Standard Description window, create the standard description that you want to add to this category.

15) In the Supporting Information section, click the Support Experts tab.

- To assign an expert staff, in the Support Experts tab, click Actions > Assign Support Staff and select the required staff.
- To assign an expert queue, in the Support Experts tab, click Actions > Assign Support Queue, and select the required queue.

16) Click Save.

17) (Optional) To designate the current record as inactive, select the Inactive check box.

For example, the category for an outdated operating system is no longer applicable because computers in the account do not use the outdated operating system.

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**NOTE:** Records marked as inactive are not included in any search performed on the database.

- Displaying categories in Self Service:

  There are three options to be selected for the category to be displayed in Self Service in different forms. To make a category available only in the Incident form in Self Service, the following options must be used:

  - Display in Self Service - Selected
  - Available for Incidents - Selected
  - Available for Service Requests - Not Selected

  To make a category available only in the Service Request form and in the Category tree of browse Service Requests in Self Service, the following options must be used:

  - Display in Self Service - Selected
  - Available for Incidents - Not Selected
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- Available for Service Requests - Selected
  To make a category available only in the Category tree of browse knowledge articles in Self Service, the following options must be used:
- Display in Self Service - Selected
- Available for Incidents - Not Selected
- Available for Service Requests - Not Selected

If you select all the three options, the category is available in Incident form, Service Request form, Category tree (browse service requests and browse knowledge articles) in Self Service.
- Available for Incidents - Selected
- Available for Service Requests - Not Selected

In Summary

Categorization will be one of the most vital elements of your ITSM practice. BMC strongly encourages you to give this area the due time and consideration it deserves. The old adage “Measure twice, cut once” applies more to categorization than any other part of your ITSM planning.

Fortunately, the BMC Remedyforce Onboarding Services team is here to assist you in focusing on developing a categorization structure which will give your organization a solid place to start, and allow you to custom fit the approach for your organization. You can learn more about BMC Remedyforce Onboarding Services at [http://www.bmc.com/it-services/remedyforce-services.html](http://www.bmc.com/it-services/remedyforce-services.html).

BMC Remedyforce has an extremely active user community where you can get answers to additional questions on this topic. We encourage you to take a look at [bmc.com/communities](http://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.