

REQUEST FULFILLMENT & ACCESS MANAGEMENT

WORKFLOW, TIPS & TRICKS

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- ▶ Any user request which is not an incident

SERVICE REQUEST

RFS PROCESS DEFINITION

- ▶ ***The request fulfillment process*** is a tool that leads to satisfied end-users and therefore adds value to the business. The primary objective of this process is to return the IT service to users as quickly as possible



Take a pause! Write 2-3 examples of user requests according your job experience. Post them to a course forum.



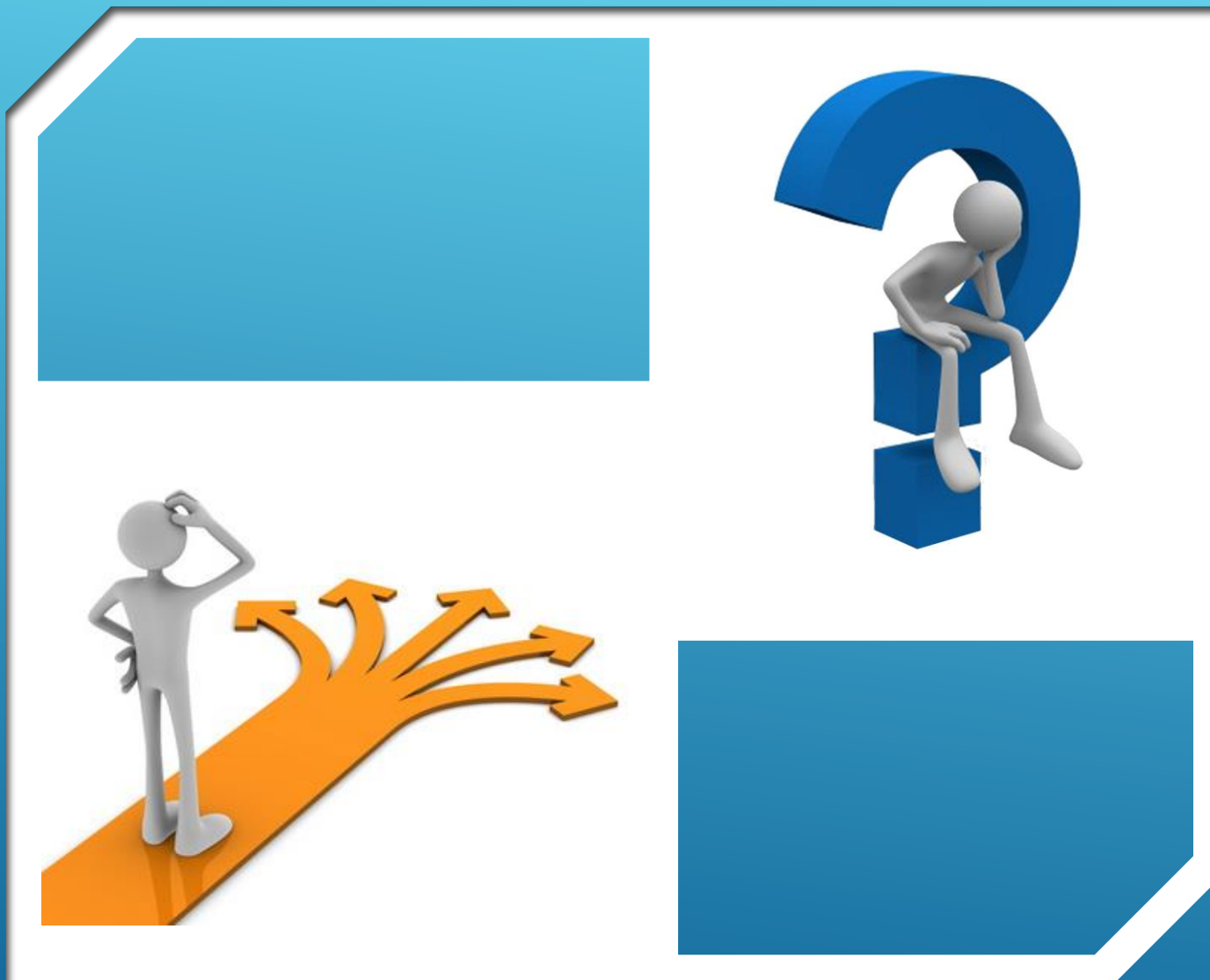
PROCESS OBJECTIVES

- ▶ Provide users a process for standard operations, or components of services
- ▶ Provisioning of information (service availability, status, how-to, etc.)
- ▶ Support standard changes

The image displays two panels of a mobile application interface for booking services. The left panel is the 'SEARCH' screen, featuring a blue header with the word 'SEARCH' and an upward arrow. Below the header, there is a section titled 'I need a...' with a dropdown menu showing 'E.g., cleaner, dentist, mechanic...'. Underneath is a 'Near...' section with a text input field containing 'Current Location' and a clear button (an 'x' in a circle). At the bottom of the search panel is a blue bar with the word 'DETAILS' and a downward arrow. A large green 'Book!' button is positioned at the very bottom of the left panel. The right panel is the 'DETAILS' screen, also with a blue header containing 'DETAILS' and an upward arrow. Below the header, it says 'Please select a service type' with a dropdown menu showing 'E.g., blow dry + style, root touch up...'. This is followed by three selection options, each with left and right navigation arrows: '1 person', 'Saturday, Aug 01, 2015', and 'Between' (which is followed by two time slots, '10:00' and '11:00', each with its own left and right navigation arrows). A green progress bar is visible at the bottom of the right panel.

- ▶ **Request Fulfilment Support**
 - ▶ Process Objective: To provide and maintain the tools, processes, skills and rules for an effective and efficient handling of Service Requests.
- ▶ **Request Logging and Categorization**
 - ▶ Process Objective: To record and categorize the Service Request with appropriate diligence and check the requester's authorization to submit the request, in order to facilitate a swift and effective processing.
- ▶ **Request Model Execution**
 - ▶ Process Objective: To process a Service Request within the agreed time schedule.
- ▶ **Request Monitoring and Escalation**
 - ▶ Process Objective: To continuously monitor the processing status of outstanding Service Requests, so that counter-measures may be introduced as soon as possible if service levels are likely to be breached.
- ▶ **Request Closure and Evaluation**
 - ▶ Process Objective: To submit the Request Record to a final quality control before it is closed.

RFS WORKFLOW SUB-PROCESSES



RFS UNCERTAINTIES

- ▶ To Do or not To DO
- ▶ How To Do
- ▶ Is RFS Done
- ▶ Conflict Resolution

- ▶ Define a model just after the Request type is added to SLA
- ▶ Agree a model with a customer or user representative
- ▶ Update Knowledgebase with a record containing a model

- ▶ Visualize the model
- ▶ Define escalation and conflict resolution procedures



REQUEST MODEL

- ▶ Request: Help me to access the video instruction at the corporate database
- ▶ Model:
 - ▶ Connect remotely to a user's desktop
 - ▶ Open Chrome browser
 - ▶ In the browser open the <https://localhost/knowledgebase/video> link
 - ▶ In the search string insert the text with video name or its part
 - ▶ Show to a user



REQUEST MODEL EXAMPLE

- ▶ Each user request **MUST** be logged
- ▶ Users should be provided by at least **TWO** technically independent tools to send requests (for example, Web form and cell phone)
- ▶ Provide users a form with a drop-down list of available service requests

- ▶ Which tools does your service desk use for users requests?
- ▶ Which tools do you consider the most appropriate?
- ▶ Why?
- ▶ Post your description at the course forum and discuss with the trainer.



LOGGING TIPS

- ▶ Hierarchic escalation is necessary for both a user and SD operator to their appropriate managers

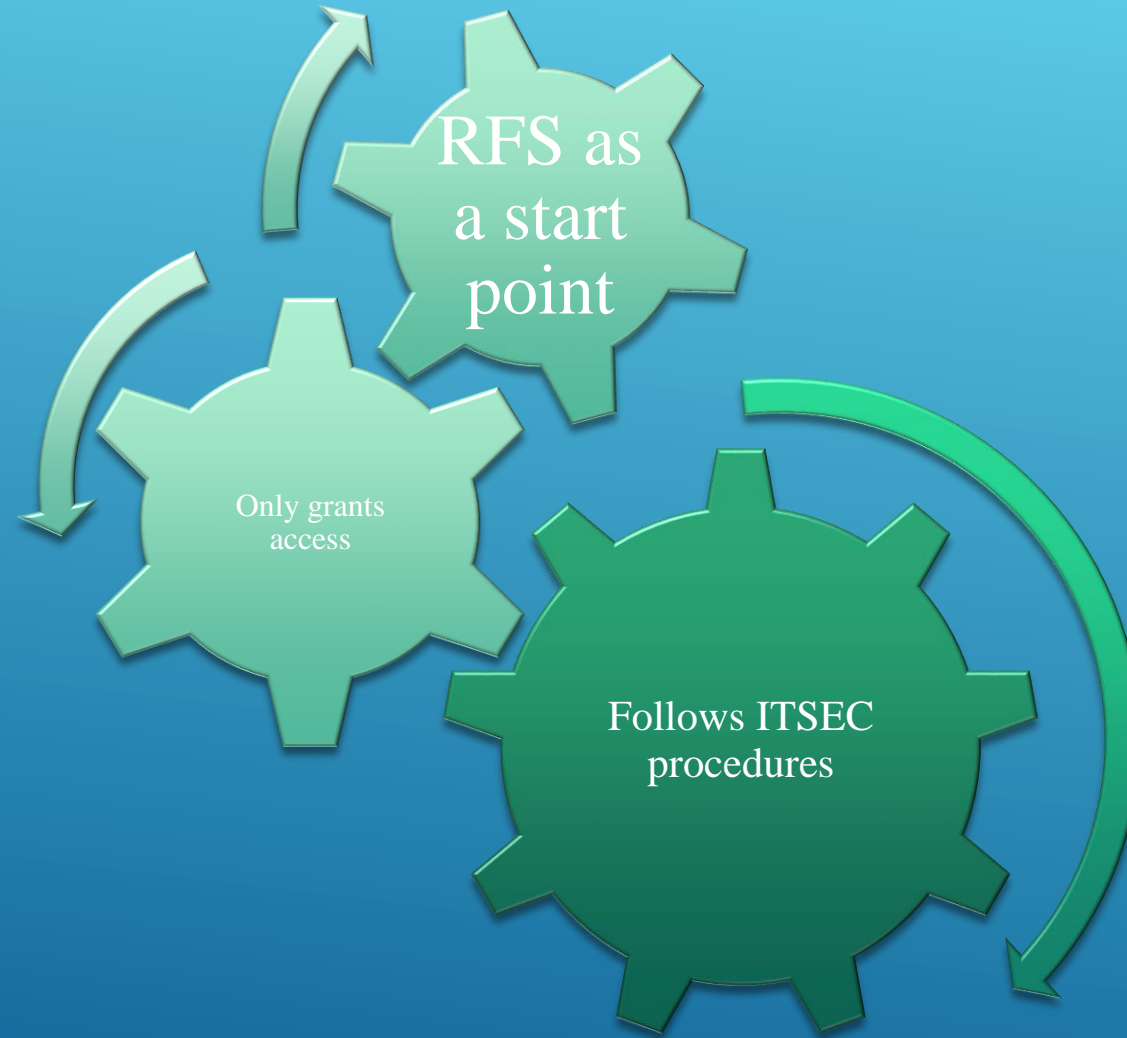


Tips!

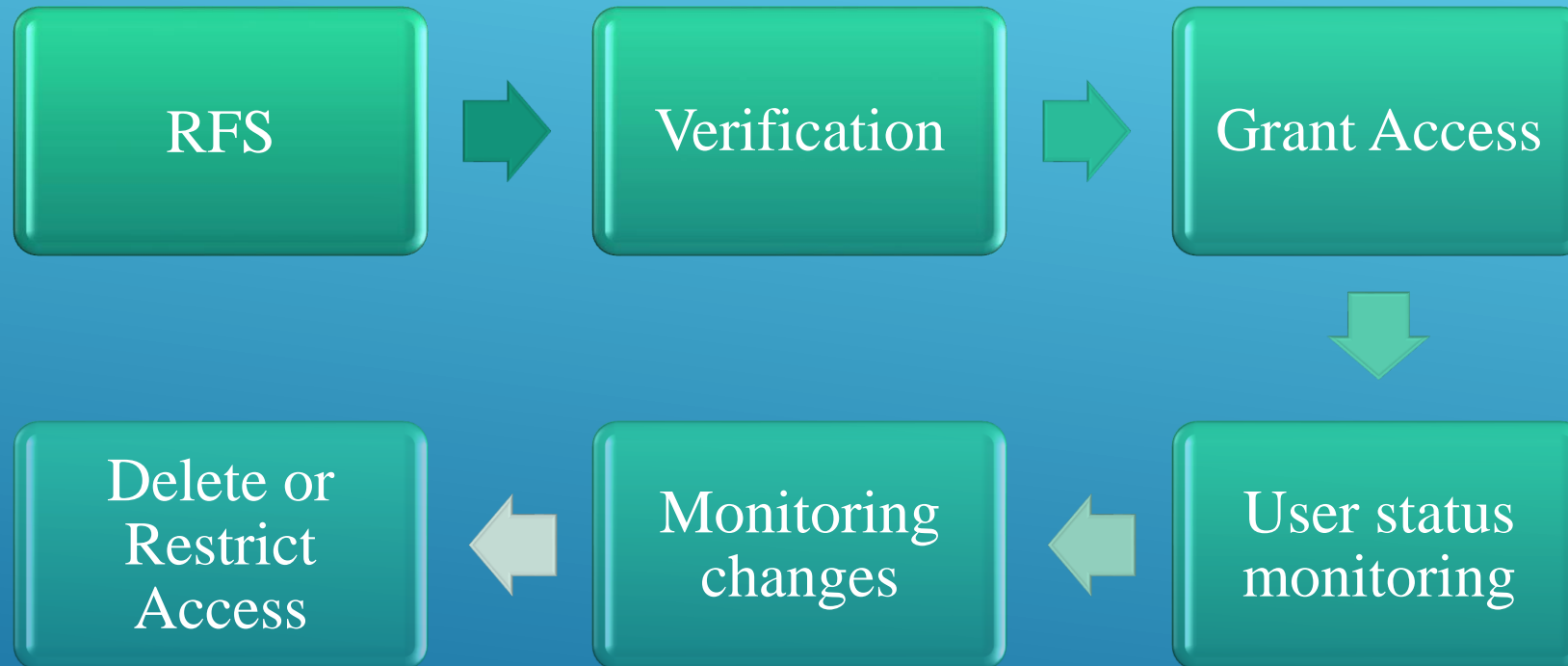
- ▶ An SD operator works ONLY following the request model
- ▶ If a user does not confirm RFS resolution after applying the model, the synchronous escalation procedure starts

RFS ESCALATION PROCEDURE

ACCESS MANAGEMENT



PROCESS WORKFLOW



VERIFICATION

Verify initiator

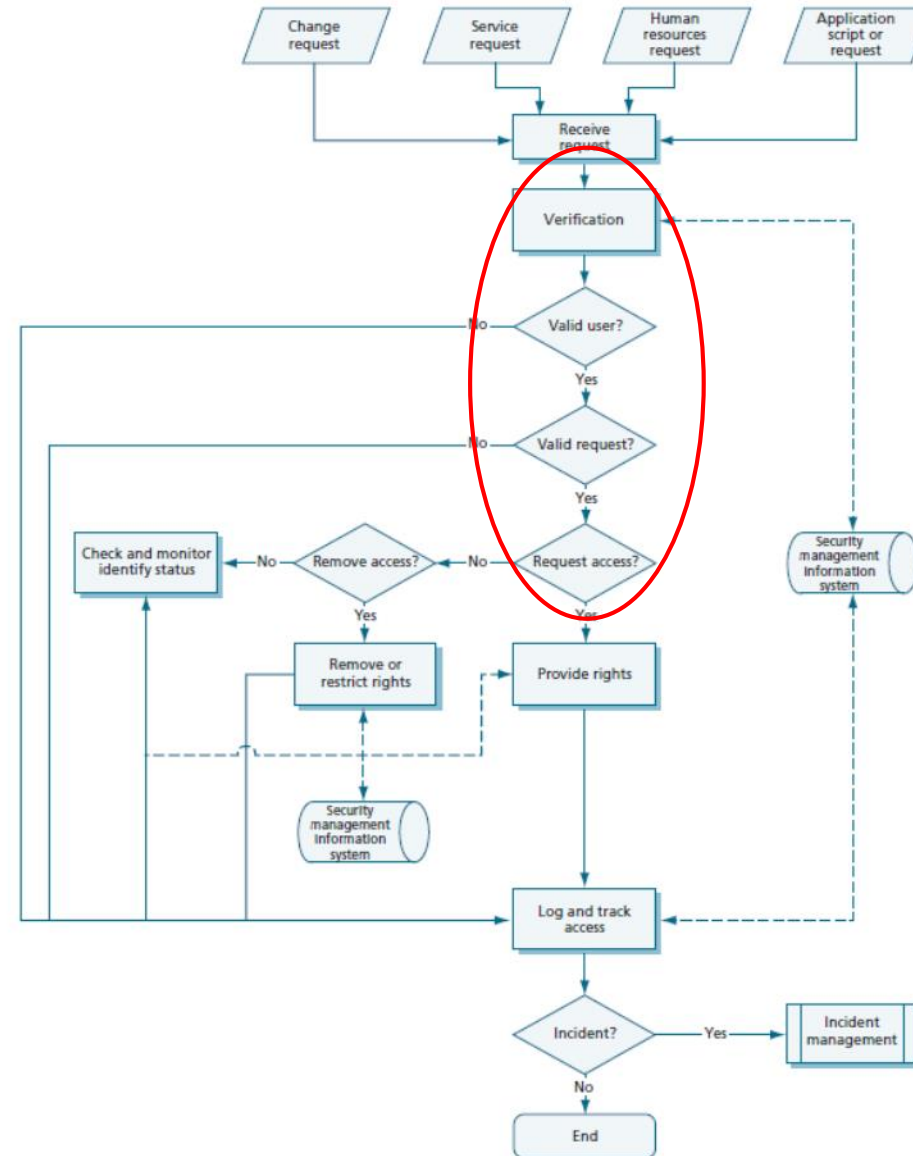
HOW?

Authorize the request

Authorize by HR

Authorize by a manager

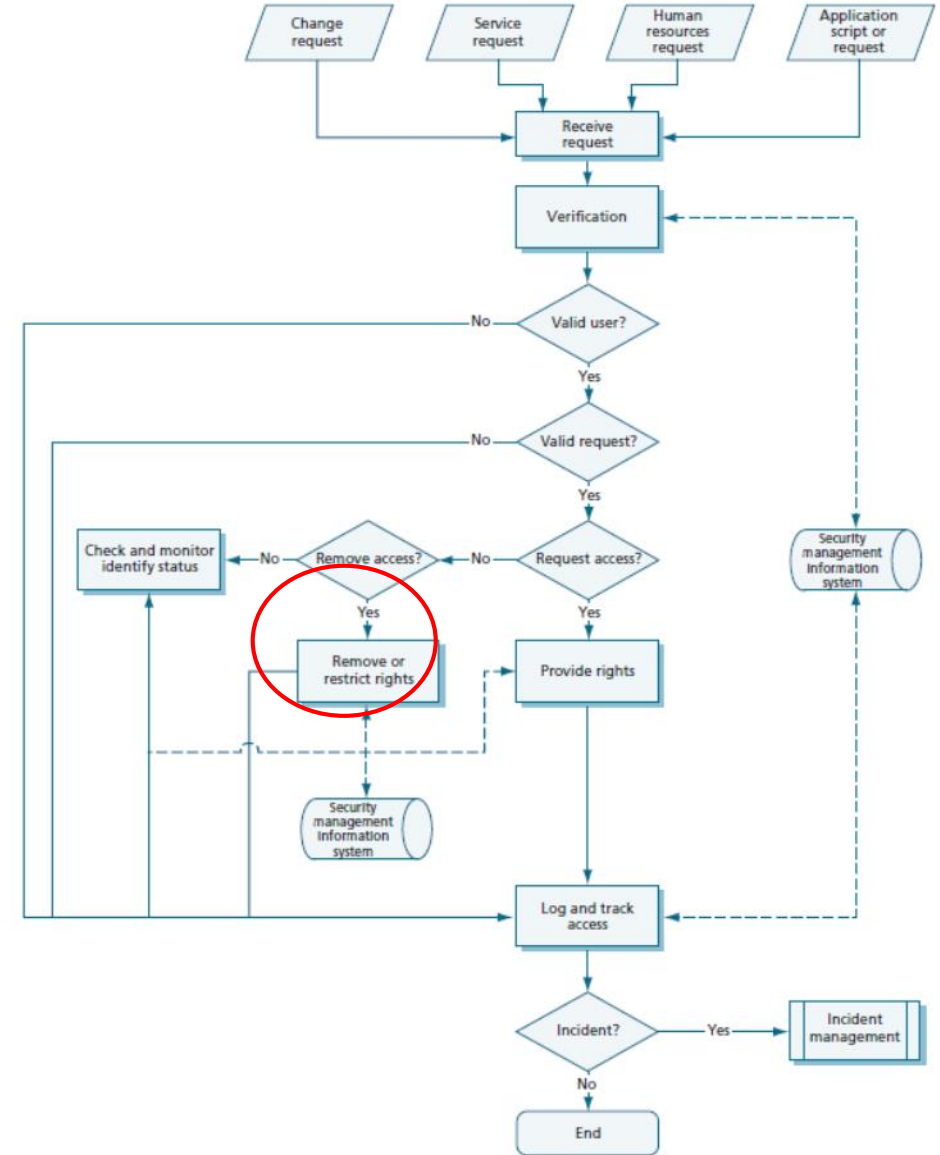
...



DELIVER ACCESS RIGHTS

Follow
policies

Control role
conflicts



USER MONITORING

User status changes

- Role change
- Vacations
- Business trip
- User fired
- Death

