

HP Service Manager

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For the supported Windows® and Linux® operating systems

Request Fulfillment help topics for printing

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Introduction

HP Service Manager Request Fulfillment manages user requests for products and services. Examples include password resets, individual PC upgrades, and new employee setup.

The following sections provide information to help you use the Request Fulfillment application as business users and as administrators:

- ["Request Fulfillment overview" on page 8](#)
- ["Request Fulfillment security roles" on page 14](#)
- ["Request Fulfillment workflows and user tasks" on page 16](#)
- ["Request Task workflows and user tasks" on page 48](#)
- ["Request Fulfillment administration" on page 74](#)
- ["Request Fulfillment configuration" on page 78](#)
- ["Security" on page 91](#)

Request Fulfillment overview

The HP Service Manager Request Fulfillment is an application used to manage user requests for products and services.

The Request Fulfillment application enables business staff to improve their productivity or the quality of business services and products. It can also help reduce the cost of providing services and reduce people effort involved in requesting and receiving access to services. Moreover, the use of Request Fulfillment application can increase the control level of an organization's services and the number of fulfilled requests.

Request Fulfillment includes the following key features:

- Request model, which defines the prerequisites, required authorizations, and sequenced or parallel standard tasks to fulfill the service request
- A detailed, customizable catalog of products
- Scheduling of service requests and tasks
- Automated request fulfillment
- Order and stock management
- Interaction with other Service Manager applications, such as Service Catalog, Configuration Management, Service Desk, Incident Management, Change Management, and Service Level Management. Service Catalog (Front Office) and Request Fulfillment catalog (Back Office product catalog) work together to provide an end-to-end process of service requests, from the end user portal (Service Catalog or SRC), to the automated dispatching and control of every tasks for the delivery of the service.
- Integration with other products, including:
 - Providing a common web service interface so that other products are able to access service requests and tasks
 - Integration with Asset Manager for request fulfillment billing

For Request Fulfillment processes and best practices, see the corresponding sections in [Processes and Best Practices Guide](#).

Key elements of Request Fulfillment

Request Fulfillment includes the following key elements:

- [Request Model](#)
- [Product Catalog](#)
- [Vendors/suppliers](#)
- [Requests](#)
- [Request Tasks](#)
- [Orders](#)
- [Authorization processing](#)

Request Model

A repeatable model of handling a particular category of service request. A request model defines specific agreed tasks that need to be followed to fulfill the service request of this category. Request models can be very simple, with no requirement for authorization (for example, password reset), or can be complex with many sequential or parallel tasks that require authorization (for example, provision of an existing IT service).

Request models are the catalog of service requests from the fulfillment perspective. Usually, the request models are referenced in the connector of a Front Office catalog item (svcCatalog, connector "Open New Request").

Request models define the delivery workflow, through the list of their tasks, controlled by the task planner. Each task defined in a request model has a task category, which defines the role and behavior of the task (labor, product purchase, CMDB synchronization, and so on).

Product Catalog

In a request model, tasks from the Purchase category are used to order a product from a vendor, and to create the corresponding CIs. The product catalog defines which products can be purchased. The

product definition is used to process the purchase task, and to become the model of the corresponding CIs.

The product catalog is a predefined catalog of products (hardware, software, or called parts). The product catalog defines the models of independent items that may be requested or ordered.

The product catalog supports general information of parts, including part number, description, cost, and manufacturer. The inventory of the specific item is also available in the product catalog portal. The receiving details of the purchased items can be pre-defined in the product catalog.

Catalog items are represented as records in the `productCatalog` table.

Vendors/suppliers

Vendors/suppliers are internal or external providers of parts. Vendors/suppliers have a many-to-many relationship with catalog items, and may or may not directly interact with Service Manager.

Vendors/suppliers are represented as records in the `vendor` table. The terms under which a specific vendor/suppliers will provide a specific catalog item are stored in the `modelVendor` table.

Requests

A request is a high level record that defines the basic request information such as requester, required dates, coordinator, and description. Request records are the “tickets” that trace the workflow of a request from the user perspective, data entry and request task addition, through authorizations, fulfillment, and follow-up.

Request records are stored in the `request` table.

Request Tasks

A request task is a low level record that defines one of the steps to fulfill the service request. Request tasks can be created automatically according to the request model definition or manually by the authorized users. After creation, request tasks are assigned to internal workgroups or external vendors/suppliers.

Request tasks are stored in the `requestTask` table.

Orders

Order records are a type of request record that traces the workflow of an actual order of a part item or several part items from the ordering and receiving perspective. Orders are created manually by authorized users or by automated background processes when the reorder rules defined for stock management are satisfied.

Order records are stored in the `request` table, with a particular “Order” category.

Authorization processing

The authorization process automates and formalizes the technical and business evaluation by the appropriate levels of management of requests. Authorizations control accepts risk, cost, and responsibility of a request and its tasks. Authorizations create “chains” of groups who may be required to approve requests before they can advance within their lifecycle. Authorizations can have conditions attached, such as total cost, lead time requirements, and impact.

Authorizations can be defined either in request model or in the dedicated Authorization phase of the request fulfillment workflow.

Differences between Request Fulfillment and Change Management

Request Fulfillment and Change Management are separate processes, but they are closely related. Request Fulfillment handles common user requests for products and services. These requests usually affect only the person making the request, or a subordinate group of employees. Change Management handles any change to your business that modifies or disrupts the current state of that environment. Usually these modifications or disruptions affect multiple users or business units.

- Request Fulfillment
 - Handles common requests for products and services
 - Affects a small or limited number of users
 - Scope is limited
- Change Management

- Manages changes (implementations) that modify a business environment
- Affects many users
- Scope is often large, including large groups or multiple business units

Request Fulfillment and service level agreements

Process target in Service Level Management is supported by requests and request tasks. The following are the out-of-box process targets:

- Request with global lead time defined

The duration is defined in the `global.lead.time` field of the request record.

- Request Task with planned lead time defined

The duration is defined in the `planned.lead.time` field of the request task record.

- Other out-of-box process targets without lead time defined, such as:

- Platinum - Request without global lead time defined (duration is 12:00:00)
- Platinum - Request Task without planned lead time defined (duration is 12:00:00)
- Gold - Request without global lead time defined (duration is 1 00:00:00)
- Gold - Request Task without planned lead time defined (duration is 1 00:00:00)
- Silver - Request without global lead time defined (duration is 3 00:00:00)
- Silver - Request Task without planned lead time defined (duration is 3 00:00:00)
- Bronze - Request without global lead time defined (duration is 5 00:00:00)
- Bronze - Request Task without planned lead time defined (duration is 5 00:00:00)

Request Charges

HP Service Manager can track labor costs and parts costs in service request fulfillment processes.

Meanwhile HP Service Manager can pass cost and billing information for goods and services to an external financial tool. In out-of-box, integration is created using HP Connect-It between HP Service Manager and HP Asset Manager.

Costs of Request Fulfillment

Each request displays the fulfillment cost (including incremental ongoing costs associated with service options).

[Click here to show or hide links to related topics.](#)

Related concepts

["Request billing" below](#)

Request billing

By integrating HP Service Manager with HP Asset Manager, you can view the request billing report in HP Asset Manager.

You can find the "Cost of SM Service Request" widgets in the Homepage widgets library of HP Asset Manager. If you want to show these widgets in anyone's homepage, you need to manually add them. For more instructions on adding widgets to homepage, see the "Customizing Web Clients > Homepage of the Web Client" section in the Asset Manager Tailoring guide.

All credit type expense line records will be assigned to the **IT Finance** billing center, which you can find in the out-of-box database of Asset Manager. If you do not want to use the **IT Finance** billing center in your production environment, you can change the Connect-It scenarios to allocate a new billing center.

Satisfaction Survey

Service Manager provides a native survey tool, which enables you to manually send a survey from a request record or to set a schedule survey by applying the internal out-of box survey connector.

Service Manager also provides other survey integration solutions. For more information, see ["Survey introduction" on page 1.](#)

Request Fulfillment security roles

There are specific roles associated with Request Fulfillment. Service Manager uses role-based permissions to enable you to complete a task that is appropriate to your role. System Administrators manage and assign these permissions.

The following table describes the responsibilities of the Request Fulfillment security roles.

Request Fulfillment security roles

Role	Responsibilities
Request Process Owner	<ul style="list-style-type: none">• Designs request fulfillment models and workflows• Ensures process technicians have the required knowledge and the required technical and business understanding to deliver the process, and understand their role in the process• Communicates process information or changes as appropriate to ensure awareness• Reviews opportunities for process enhancements and for improving the efficiency and effectiveness of the process• Works with other process owners to ensure there is an integrated approach to the design and implementation of request fulfillment, incident management, event management, access management, and problem management
User	<ul style="list-style-type: none">• Uses Self Service or the Service Desk to log appropriate Service Requests
Requester	<ul style="list-style-type: none">• Initiates a Service Request through the Request Fulfillment portal on behalf of users
Request Coordinator	<ul style="list-style-type: none">• Provides a single point of contact and end-to-end responsibility to ensure submitted Service Requests have been processed• Provides initial triage of Service Requests to determine which IT resources should be engaged to fulfill them• Assigns a Service Request to the correct group• Communicates Service Requests to other IT resources that will be involved in fulfilling them• Escalates Service Requests in line with established Service Level Targets

Request Fulfillment security roles, continued

Role	Responsibilities
Request Analyst	<ul style="list-style-type: none">• Carries out one or more activities in the fulfillment of Service Requests• Updates the records to show that activities have been carried out correctly• Responsible for the provisioning of Service Requests within the agreed SLA
Request Approver	<ul style="list-style-type: none">• Reviews Service Request details• Confirms Service Request details are correct• Approves/Rejects Service Requests
Request Manager	<ul style="list-style-type: none">• Plans and manages support for request fulfillment tools and processes• Handles staff, customer and management concerns, requests, issues and enquiries• Involved in Service Request escalation• Ensures request fulfillment activities operate in line with service level targets
Stock Manager	<ul style="list-style-type: none">• Responsible for managing stock and defining reorder rules for different stockrooms

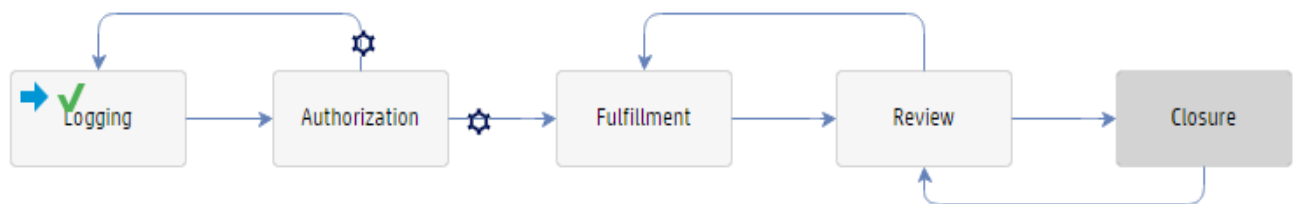
Request Fulfillment workflows and user tasks

The request workflow is a sequence of connected steps in the life cycle of a request. In the workflow, a request goes through several phases to complete the life cycle. Workflow phases can consist of one or multiple tasks that must be completed to proceed to the next phase.

The following are the out-of-box workflows for the Request Fulfillment module.

Request

The Request workflow manages the generic request fulfillment process.



The Request workflow consists of the following phases and tasks.

Workflow phase	Tasks
Logging	<ul style="list-style-type: none">• Create a new request record• Create a new request from a user interaction• Create a request by copying an existing request record• Apply a request template• Create a request template• Apply a request model to an existing request record• Update a request record• Update multiple request records• Link a request to another record• Set a reminder for a request• Send a notification from a request• View audit log from a request• Access the alert log when viewing a request
Authorization	<ul style="list-style-type: none">• Approve or deny a request• Approve multiple request records• Update a request record• Escalate a request• Update multiple request records• Set a reminder for a request• Send a notification from a request• View audit log from a request• Access the alert log when viewing a request• Create a request template

Workflow phase	Tasks
Fulfillment	<ul style="list-style-type: none">• Suspend a request• Update a request record• Create a request task• Escalate a request• Update multiple request records• Link a request to another record• Set a reminder for a request• Send a notification from a request• View audit log from a request• Access the alert log when viewing a request• View or edit the cost of a request• Create a request template
Review	<ul style="list-style-type: none">• Update a request record• Update multiple request records• Escalate a request• Link a request to another record• Set a reminder for a request• Send a notification from a request• View audit log from a request• Access the alert log when viewing a request• View or edit the cost of a request• Create a request template

Workflow phase	Tasks
Closure	<ul style="list-style-type: none">• Close a request record• Reopen a request record• Send a notification from a request• View audit log from a request• Access the alert log when viewing a request• Create a request template

Order

The Order workflow manages purchase and stock management in the Request Fulfillment application.



The Order workflow consists of the following phases and tasks.

Workflow phase	Tasks
Order	<ul style="list-style-type: none">• Create a new request record• Create a new request from a user interaction• Create a request by copying an existing request record• Apply a request template• Update a request record• Update multiple request records• Set a reminder for a request• Send a notification from a request• View audit log from a request• Access the alert log when viewing a request• View or edit the cost of a request• Create a request template
Closure	<ul style="list-style-type: none">• Close a request record• View audit log from a request• Send a notification from a request• Access the alert log when viewing a request• Create a request template

For examples that demonstrate the minimum needed steps to complete the out-of-box request workflows, see ["Examples: request workflows" on the next page](#).

To view more workflow diagrams and other information about this process, such as related ITIL processes, refer to the Process Designer Best Practices Guide that is linked to in the related topics.

Examples: request workflows

The following examples demonstrates the minimum needed steps to complete the out-of-box request workflows.

Request workflow

Phase	User Actions	Options
Logging	<ol style="list-style-type: none"> 1. Enter a title in the Title field. 2. Provide a description of the request in the Description field. 3. Click the Fill button for Requestor, and then select the requester. <p>Note: The assignment group is pre-filled by the out-of-box assignment rule automatically.</p> <ol style="list-style-type: none"> 4. Select the Impact for this request. 5. Select the Urgency for this request. 6. Specify other fields such as Affected CI and Affected Service according to your business needs. 7. Click Save. 8. Select an expected date to finish the request on behalf of the requester if the request is not created from a service catalog request. <p>Note: If the user has selected the delivery target when ordering the service item or bundle, the expected finish date is automatically filled by the system.</p>	<p>This is the first phase when you create a new request (Request Fulfillment > Create New Request) based on a category or request model that uses the "Request" workflow.</p> <p>You create a request by selecting a category or a request model, depending on the "Select on Open" setting in Request Fulfillment > Administration > Settings.</p> <p>Tip: If you are creating a new request based on request models, you can use the search function on the form to quickly locate the request model that you want to use.</p>

Phase	User Actions	Options
Authorization	<p>1. Click the Submit for Approval button.</p> <p>Note: In the out-of-box system, no approval definition is defined in the Authorization phase, so after you click Submit for Approval, the request will directly go to the Fulfillment phase.</p> <p>System administrators can add approval definitions in the Authorization phase based on business needs.</p> <p>If approvals are defined in the Authorization phase, the request will be in pending approval status and the request form cannot be edited until the request is approved or denied.</p> <p>When the request is approved, it automatically moves to the Fulfillment phase; when request is denied, it automatically moves back to the Logging phase.</p>	<p>By default, if a request is denied and is not updated after seven days, the request will be automatically closed with the "Denied request fulfillment" closure code.</p> <p>Tip: System administrators can edit the "rm.close.denied.request" rule set to define the days to automatically close the denied requests.</p>
Fulfillment	<p>1. Update the request record as necessary based on your fulfillment actions and progress.</p> <p>2. If request tasks are defined in the Fulfillment phase, complete the request tasks as required.</p>	<p>Note: In the Fulfillment phase, you can suspend the request. For more information, see "Suspend a request" on page 32.</p>

Phase	User Actions	Options
Review	<ol style="list-style-type: none">1. Click the Review button after all the request tasks defined in the Fulfillment phase are completed.2. Review and update the information in the request.	From the Review phase, you can also return to the Fulfillment phase by clicking the Back to Fulfill button.
Closure	<ol style="list-style-type: none">1. Click the Close button.2. Enter or change the subcategory for the request.3. Select the appropriate closure code.4. Enter the closure comments.5. Click Finish.	From the Closure phase, if you have the "Reopen" right in the "Request" area, you can click the Reopen button to reopen the closed request. After you click Reopen , the request is moved back to the Review phase.

Note: You can create a request task by using the task planner in the **Tasks** section. All tasks must be closed before you can close a request. For more information about how to create a request task, see ["Create a request task" on page 59](#).

Order workflow

Phase	User Actions	Options
Order	<ol style="list-style-type: none"> 1. Enter a title in the Title field. 2. Provide a description of the request in the Description field. 3. Click the Fill button for Requestor to select the requester. <p>Note: The assignment group is pre-filled by the out-of-box assignment rule automatically.</p> <ol style="list-style-type: none"> 4. Select a value in the Impact field. 5. Select a value in the Urgency field. 6. Select an expected date to finish the request. 7. If necessary, set other fields for this request, and then click Save. 8. Select an expected date to finish the request on behalf of the requester if the request is not created from a service catalog request, and then click Save. <p>Note: If the user has selected the delivery target when ordering the service item or bundle, the expected finish date is automatically filled by the system.</p> <ol style="list-style-type: none"> 9. Finish the purchase task associated with the request. 	<p>This is the first phase when you create a new request (Request Fulfillment > Create New Request) based on a category or request model that uses the "Order" workflow.</p> <p>You can create a request by selecting a category or a request model, depending on the "Select on Open" setting in Request Fulfillment > Administration > Settings.</p> <p>Tip: If you are creating a new request based on request models, you can use the search function on the form to quickly locate the request model that you want to use.</p> <p>Note: If you use the "Order" request model, a purchase task is automatically created as defined in the task plan.</p>

Phase	User Actions	Options
Closure	<ol style="list-style-type: none">1. Click the Close button.2. Enter or change the subcategory for the request.3. Select the appropriate closure code.4. Enter the closure comments.5. Click Finish.	

Tip: To check the activity log for a request record, go to the **Activities** section of the record. The **Activities** section enables you to enter new updates or view journal updates and logged activities (such as "Open" and "Update") for a record. For more information, see ["Activities section" on page 1](#).

Create a new request record

Security Roles: Requester, Request Coordinator

After a service catalog request is approved, the fulfillment records (change or request) are created according to connector definitions linked to the ordered items or bundles. If the connector defined in the ordered items or bundles is "Open New Request," a request record will be created automatically and linked to the Service Desk interaction record.

However, you may need to create a new request record, which is not automatically created through service catalog or from an existing record such as an interaction. Depending on how your administrator has configured the global settings (the "Select on Open" setting in **Request Fulfillment > Administration > Settings**), you open a new request either by selecting a request model or by selecting a request category. By default, you open a new request record by selecting a request model.

To create a new request record directly from the Request Fulfillment module, follow these steps:

1. Do one of the following:

- Click **Request Fulfillment > Create New Request** in the System Navigator.
- From the To Do Queue, select **Request** in the **Queue** field, and click **New**.

Note: If your home page is not the To Do Queue, click **Miscellaneous > My Preferences** to change your home page to **To Do Queue**, and then log off and log back in.

2. If a list of request models (which are grouped by request category and subcategory) is displayed, drill down the request categories to select a request model for the new request record. If a list of request categories is displayed, select a request category for the new request record.

Tip: If you are creating a new request based on request models, you can use the search function on the form to quickly locate the request model that you want to use.

Service Manager displays a new form, automatically assigns a request ID, and populates the fields that are defined in the request model or based on the request category that you selected.

3. If you are creating the request for someone other than yourself, change **Requested For** to the recipient.

4. Complete the following mandatory fields:

- Title
- Description
- Requestor
- Assignment Group
- Impact
- Urgency

5. Complete the form with any required or additional information such as **Affected CI** and **Affected Service**, and then click **Save**.

A new request record is now created. Service Manager automatically populates the **Priority** field with a value that is calculated based on the Impact and Urgency values you selected.

6. Select an expected date to finish the request on behalf of the requester if the request is not created from a user interaction.

Note: If the user has selected the delivery target when ordering the service, the expected finish date will be automatically filled by the system.

7. Click **Save**.

Note: You can add parts and labor costs tracking to an incident, problem, change, or request or to any associated task of a record. To do this, navigate to the **Cost** tab, specify the currency, and then specify the date, part number, and quantity for any parts used. Alternatively, specify the date, technician name (used to derive the rate from the operator record), and hours worked for any labor. Service Manager will automatically calculate and roll up costs from any sub tasks into the **Total cost** field on the **Costs** tab.

Create a new request from a user interaction

Security Role: Service Desk Agent

As a Service Desk Agent, you can escalate an interaction that is in the “Request for Administration” (RFA) or “Request for Information” (RFI) category to a request.

Note: To escalate an RFA or RFI interaction to a request, the “escalate to request” option must be selected as the escalate type in these interaction categories.

To escalate an interaction to a request, follow these steps:

1. Click **Service Desk > Interaction Queue** or select **Interaction** from your To Do Queue list.
2. From the record list, double-click the interaction record that you want to escalate to a request.

Note: You can only escalate the interactions that are in the “Request for Administration” (RFA) or “Request for Information” (RFI) category to a request.

3. From the interaction record, click **Escalate**.

Note: The **Escalate** action is available in Logging, Categorization, or Work In Progress phase.

4. Link the interaction to an existing request or click **Create New Request** to create a new request.

After the interaction is escalated, the interaction automatically moves to the “Work In Progress” phase and the “Dispatched” status.

Create a request by copying an existing request record

Security Roles: Requestor, Request Coordinator

You can create a new request by copying an existing request record. The new request will start from the first phase in request fulfillment workflow. The task plan defined in the original request record is also copied to the new request record.

This “Copy Record” action is available in all request phases. Users who have the “New” right in the “Request” area can run this action.

To create a request by copying an existing record, follow these steps:

1. Click **Request Fulfillment > Search Requests**, enter your search criteria, and then click **Search**.
2. Open the request record from which you want to create a new request.

3. Click **More**, and then click **Copy record**. A new request form opens with the information copied from the previous request record.
4. Modify the new request record as needed, and then click **Save**.

Update a request record

Security Roles: Request Coordinator, Request Analyst

After a request record is created, you may need to update that record to add or correct some information, change the status of the request, move a request to the next phase, or send some updates to the customer.

To update a request record, follow these steps:

1. In the System Navigator, click **Request Fulfillment > Request Queue** or **Search Requests**.
2. Locate the request record that you want to update, and then double-click the record to open it.
3. Modify the applicable fields such as status in the request form.
4. On the **Activities** tab, do the following:
 - a. In the **New Update Type** field, select an appropriate type.
 - b. In the **New Update** field, type a description of your update.
 - c. Select the **Visible to Customer** check box if you want to make this update visible to the end user.
5. Click **Save**. The request record is now updated.
6. If needed, click the appropriate button to move the request record the next or previous phase.

Note: You can add parts and labor costs tracking to an incident, problem, change, or request or to any associated task of a record. To do this, navigate to the **Cost** tab, specify the currency, and then specify the date, part number, and quantity for any parts used. Alternatively, specify the date, technician name (used to derive the rate from the operator record), and hours worked for any labor. Service Manager will automatically calculate and roll up costs from any sub tasks into the **Total cost** field on the **Costs** tab.

Suspend a request

Security Roles: Request Coordinator, Request Analyst

If you temporarily cannot process the request, you can suspend the request when it is in the Fulfillment phase. You need to specify when to reactivate the request and the justification for request suspension.

When reactivated time is reached, the request is automatically unsuspended and the status is changed back to “In Progress”. If you manually change the status back to “In Progress” before the reactivated time is reached, you need to provide a justification in the unsuspension wizard.

To suspend a request, follow these steps:

1. In the System Navigator, click **Request Fulfillment > Request Queue** or **Search Requests**.
2. Locate the request record that you want to suspend, and then double-click the record to open it.

Note: You can only suspend requests that are in the Fulfillment phase.

3. In the **Status** field, select **Suspended**, and then click **Save**.

The Suspend Request wizard is displayed.

4. Select the reactivated time.
5. Enter the justification for suspending this request.
6. Click **Finish**. The request is now suspended.

Approve or deny a request

Security Roles: Request Approver

You can approve or deny a request that is pending approval only if you are a member of the necessary approval group and you are assigned the appropriate Request Fulfillment security right.

These actions are available in all phases except “Closure”. Users who have the “Can Approve” right in the “Request” area are authorized to run these actions.

To approve or deny a request in the approval inbox, follow these steps:

1. Log on to Service Manager as the request approver.
2. Click **Approval Inbox**.

Requests awaiting your approval are displayed.
3. Select the request that you want to approve, and click **View**.
4. Review the details of the request record.
5. After you finish your review, click **Cancel**.
6. Select the request that you want to process, and then approve or deny it according to your review result:
 - To approve the request, click **Approve**. The request moves to the next phase.
 - To reject the request, click **Deny**, enter a rejection reason and additional comments, and then click **OK**. The request returns to the previous phase.

From the request record, you can also approve or deny the request. In addition, you can retract a previous approval or denial action from the request record. To do so, follow these steps:

1. In the System Navigator, click **Request Fulfillment > Request Queue** or **Search Requests**.
2. Locate the request record on which you want to perform the approval actions, and then double-click the record to open it.
3. Open the **Approvals** section, and then go to the **Current Approvals** subsection. The Current Approvals form lists the approval type and approval status.
4. Click an approval type to learn which approval group is assigned this approval type. When a request requires more than one approval, the approvals must occur in the order listed in the **Sequence** column.
5. Review the request information and determine how you will process the approval request.
6. To approve a request, click **Approve**.

HP Service Manager changes the approval status to **approved**.
7. To deny a request, click **Deny**. Type the reason you are denying the request, and then click **OK**.
Service Manager changes the approval status to **denied**, and no further approvals are possible

until the denial is retracted.

8. To retract a previous approval or denial action, click **Retract**. Type the reason you are retracting the request, and then click **OK**. Service Manager changes the approval status to **pending**, and the request requires a new approval cycle to progress.

Escalate a request

Security Roles: Request Coordinator, Request Analyst

After the Logging phase, you can perform hierarchical escalation in a request record. After the request is flagged as "Escalated," the system notifies the specified escalation manager.

To escalate a request, follow these steps:

1. In the System Navigator, click **Request Fulfillment > Request Queue** or **Search Requests**.
2. Locate the request record that you want to escalate, and then double-click the record to open it.
3. Select the **Escalated** check box. The **Request Manager** field is displayed.

Note: The **Escalated** check box is not available in the Logging phase.

4. Fill in the **Request Manager** field.
5. Click **Save**.

The request is now escalated and the request manager will receive a notification.

Create a request template

Security Role: Request Manager

Templates enable users to quickly complete request records by automatically populating various fields with necessary information. You can create as many templates as you need while authorizing select user roles for each template. The users authorized to use a particular template will then be able to apply that template when completing a request.

You can create a request template either from the system navigator menu (**Tailoring > Templates**) or directly from an existing request record.

To create a template from the system navigator menu, follow these steps:

1. Click **Tailoring > Templates**.
2. Click **New**.
3. Type a name in the **Template name** field.
4. Select **Request** in the **Table name** field, and then click **Next**.
5. Click **Fill** for each role that you are authorizing to use this template.
6. Modify the fields as required to meet the needs of your template by clicking the field to assign a value.
7. Click **Add**. The roles that are authorized for this template can now use or modify this template.

To create a template from an existing request record, follow these steps:

1. Click **Request Fulfillment > Search Requests**, and then search for the record that you want to create a template from.
2. From the request record, click **More** or the More Actions icon, and then select **Create Template from Record**.

Note: To use this action, you must have the “Modify Template” right in the “Request” area.

3. Edit the name in the **Template name** field.
4. Modify the fields as required to meet the needs of your template by clicking the field to assign a value.
5. Click **Add**. The roles that are authorized for this template can now use or modify this template.

Apply a request template

Security Roles: Requestor

Templates enable you to quickly complete a request record by automatically populating fields with the applicable information. You can apply a template when completing a request if you are authorized to use that particular template.

Note: Make sure that the “Supports Templates” option is enabled in the request object.

To apply a template to a request, follow these steps:

1. Click **Request Fulfillment > Search Requests**, enter your search criteria, and then click **Search**.
2. Open the request record to which you want to apply a template.
3. Click **Apply Template**. The Select Request Template wizard opens.

Note: The **Apply Template** action is available in all request phases except "Closure". To run this action, you must have the “Update” or “New” right in the “Request” area. However, if you just have the “New” right, you can only run this action when in the “Logging” phase.

4. Click the template that you want to apply to the selected request. You are returned to the selected request record and the fields are automatically filled in with the values set in the template.

Tip: Users authorized to use this template can also modify the template to meet their needs.

5. Modify other fields, as needed.
6. Click **Save & Exit**.

Apply a request model to an existing request record

Security Roles: Request Coordinator, Request Manager

A request model is designed to handle a particular category of service request. Specific agreed tasks are defined in the request model to fulfill the service request of this category.

You can apply a request model to an existing request record that does not have a request model applied or you can apply a request model to replace the previous request model.

In the out-of-box setting, the **Apply Request Model** option is only available for the request records in the “Logging” phase. Users who have the “Update” right in the “Request” area and the “Expert” right in the “Request Tasks” area are authorized to do this action.

After you apply a new request model to a request record:

- The field values defined in the request model will overwrite the values in the request record.
- All the existing tasks in the "Waiting" phase are automatically cancelled as these tasks have not been worked on. However, you must manually cancel the existing tasks after the "Waiting" phase before you can apply a new request model.

Note: Apply request model is not supported in the Order workflow.

To apply a request model to a request record, follow these steps:

1. Do one of the following in the System Navigator:
 - a. Click **Request Fulfillment > Search Request** , enter your search criteria, and then click **Search**.
 - b. Click **Request Fulfillment > Request Queue**.
2. Open the request record that you want to apply a new request model to.
3. Click **More > Apply Request Model**.

Note: In the out-of-box setting, the **Apply Request Model** option is only available for the request records in the "Logging" phase.

If the request record has active tasks, you will be prompted to cancel all the active tasks manually before applying a request model.

4. Select the request model that you want to use from the list.
5. Click **Yes** to apply the request model.

The selected request model is applied to the request record.

Update multiple request records

Security Role: Request Coordinator

You can use the mass update feature to update one or more values in multiple request records. When you perform a mass update, the value that you enter for a particular field becomes the value for that field in all the records that you selected.

In addition, you can use complex update to enter expressions as instructions to perform actions on multiple request records.

To update multiple request records by using **Mass Update**, follow these steps:

1. Locate the records by using one of the following methods:
 - Click **Request Fulfillment > Request Queue** to display a list of records.
 - Click **Request Fulfillment > Search Requests**, and then search for the records.
2. Select the records that you want to update.
3. Click **Mass Update**.
4. Click the field that you want to update.
5. Type the value for the field or use the Find feature to display a list of potential values for the field, and then click **Next**.
6. Repeat steps 4 and 5 for additional fields as needed.
7. Click **Execute**.

To update multiple request records by using **Complex Update**, follow these steps:

1. Locate the records by using one of the following methods:
 - Click **Request Fulfillment > Request Queue** to display a list of records.
 - Click **Request Fulfillment > Search Requests**, and then search for the records.
2. Select the records that you want to update.
3. Click **Mass Update**.
4. Click **Complex Update**.
5. Follow the instructions in the complex update form and type the expressions.
6. Click **Execute**.

Approve multiple request records

Security Role: Request Approver

You can approve multiple requests by using mass approval.

When you select the **Mass Approve** option, all the requests on the list that are waiting for your approval are immediately approved.

This action is available for users who have the “Expert” right in the “Request” area.

To approve multiple request records, follow these steps:

1. Locate the records by using one of the following methods:
 - Click **Request Fulfillment > Request Queue** to display a list of records.
 - Click **Request Fulfillment > Search Requests**, and then search for the records.
2. Select the records that you want to approve.
3. Click **Mass Approve**.

Link a request to another record

Security Role: Request Coordinator

In the **Related Records** section of a request record, you can view the current related records, associate an existing interaction, incident, change, or request record with the current request record, or open a new incident, change, or request record that is automatically related to the current request record.

Note: This is not supported in the records that use the Order workflow.

To link a request to another record, follow these steps:

1. Do one of the following in the System Navigator:
 - a. Click **Request Fulfillment > Search Requests**, enter your search criteria, and then click **Search**.
 - b. Click **Request Fulfillment > Request Queue**.
2. Open the request record that you want to link to another record, and then go to the **Related Records** section.
3. If you want to link the request to an existing record, follow these steps:

- a. Select one of the following link types:
 - **Caused By Changes**
 - **Caused Changes**
 - **Related Interactions**
 - **Related Incidents**
 - **Related Requests**
- b. Click the **Link Existing Record** button.
- c. Specify the record number or click **Search** to search for the existing record.
- d. Click **OK**.

The system populates the **Related Records** section with information about the related record.

Tip: You can also link an interaction, change, or incident record to existing request records from the **Related Records** section in the interaction, change, or incident record.

4. If you want to link the request to a new record that you are about to create, follow these steps:
 - a. Select one of the following link types:
 - **Caused Changes**
 - **Caused By Changes**
 - **Related Incidents**
 - **Related Requests**
 - b. Click the **Link New Record** button.
 - c. Enter the required information to create the new record.

Note: Some fields are automatically populated based on the request record. For example, if you are creating a new request, the system copies the values in the **Title, Description,**

Impact, and **Urgency** fields from the exiting request to the new request.

- d. Click **Save and Exit**.

Request Fulfillment populates the **Related Records** section with information about the related record.

Tip: Similarly, from the **Related Records** section of an interaction, change, or incident record, you can create a new request and associate it automatically with the interaction, change, or incident record.

Set a reminder for a request

Security Roles: Requestor, Request Coordinator

You can set a reminder to notify you if an existing request record meets certain conditions by a specified time. For example, you may want to be reminded if a request is still open or is not updated by a given date.

To set a reminder for a request, follow these steps:

1. Click **Request Fulfillment > Search Requests**, enter your search criteria, and then click **Search**.
2. Open the request record for which you want to set a reminder.
3. Click **More** or the **More Actions** icon, and then select **Set Reminder**.
4. Do one of the following to set the time when the reminder occurs:
 - Click **Remind At** to set a reminder for a particular day and time.

Tip: Click **Fill** to display a calendar where you can select the date and time for the reminder.

- Click **Remind In** to set the reminder to occur at a particular interval. If you choose this option, specify the time interval (in 00:00:00 format), and select a shift from the **Based On** list.
5. In the **Remind if** field, select a condition for the reminder to occur:

- **Always.** (the default value)
 - **Request has not been updated.**
 - **Request is still open.**
 - **Request is still assigned to me.**
6. In the **Pop-up Message** area of the form, select the type of notification you want to receive.
 7. If you select **Pop-up** or **Page**, type the reminder message in the **Message** field that you want to appear in the reminder.
 8. If you select **Email** or **SM Mail**, follow these steps:
 - a. Type a title for the mail in the **Title** field.
 - b. Select the type of mail message s in the **Message Type** area:
 - Click **Send Request Record** to include a copy of the request record in the email.
 - Click **Fixed Text**, and then type the message you want to appear in the email.
 9. Click **OK**.

Send a notification from a request

Security Roles: Requestor, Request Coordinator

You can send a notification to one or more recipients in a particular request phase.

This "Notify" action is available in all request phases. Users who have the "View" right in the "Request" area can run this action.

To send a notification from a request record, follow these steps:

1. Click **Request Fulfillment > Search Requests**, enter your search criteria, and then click **Search**.
2. Open the request record from which you want to send a notification.
3. Click **More** or the **More Actions** icon, and then click **Notify**.
4. Select the date and time to send this notification.

5. Add one or more recipients to the **To** text box, or type an assignment group in the **Group** text box.
6. Select one of the following notification methods:
 - **Mail:** Uses the internal Service Manager Mail application (not email).
 - **Email:** Uses the Service Manager email application.
 - **Fax:** Requires that the SCAuto Fax adapter be configured. This option is obsolete because SCAuto Fax is obsolete.
7. Modify the subject and the message in the notification as needed.
8. Click **Send**.

View audit log from a request

Security Role: Request Coordinator

Field value changes in a request or request task record can be monitored by audit application if it is enabled.

A global setting “Audit Records” to enable or disable audit application is available in **Request Fulfillment > Administration > Settings**. When the setting value is set to “true”, the audit application will run when a request or request task is created, updated or closed. Otherwise, the audit application will be skipped.

The View Audit Log action enables users to view the audit log of the current request record. This View Audit Log action is available in all request phases. The user who has the “Expert” right in the “Request” area is allowed to run this action.

The following table lists the out-of-box audit specification for the request table:

Audit File	Audit Fields
request table	Phase
	Status
	Approval Status
	Request Model
	Requested For
	Requestor
	Assignment Group
	Assignee
	Request Coordinator

To view the audit log of a request, follow these steps:

1. Click **Request Fulfillment > Search Requests**, enter your search criteria, and then click **Search**.
2. Open your desired request record.
3. Click **More**, and then select **View Audit Log**.

Access the alert log when viewing a request

Security Role: Request Coordinator

The alert log is a file that lists currently scheduled and active alerts.

To access the alert log when viewing a request, click **More** from the record that you are viewing, and then click **View Alert Log**.

Create a scheduled maintenance task from a request record

Security Role: System Administrator

You can create a scheduled maintenance task from the current request record.

To a scheduled maintenance task from a request record, follow these steps:

1. Create a new request, or locate an existing request record in Request Fulfillment.
2. Click **More** or the More Actions icon from the request record, and then click **Generate Schedule Maintenance**.

By default, the **Create One RM Request** option is selected on the **Effect** tab and several field values are copied to the maintenance task as the request details.

3. Edit the scheduled maintenance task as needed.
4. Click **Save**.

View or edit the cost of a request

Security Roles: Request Coordinator, Request Analyst

From the **Cost** tab in a request record, you can find the total cost and the currency information for the request. The total cost includes the labor cost for handling the request and the sum of costs in all request tasks. You can also add the labor cost for handling the request.

To view or edit the cost of a request, follow these steps:

1. In the System Navigator, click **Request Fulfillment > Request Queue** or **Search Requests**.
2. Locate the request record, and then double-click the record to open it.
3. Click the **Cost** tab. The total cost of the request and the currency are displayed in corresponding fields.

Note: The total cost also includes the costs in individual request tasks. When an operator works on a request task, the operator can also view or edit the cost in that request task.

In the request record, the currency of the cost reflects the display currency of the operator defined in the **Requested For** field.

4. To add the labor cost for the request, fill in the date, the name of the technician, and the hours that the technician has spent on this request.
5. Click **Save** to save your updates.

Close a request record

Security Role: Request Coordinator

After request fulfillment and review, you can close the request record.

Note: If a service desk agent moves an interaction to the Withdrawal phase, the corresponding linked fulfillment request (if any) will be automatically moved to the Closure phase with the “Withdrawal requested by customer” closure code. In addition, all the request tasks in the request record will be cancelled automatically.

To close a request, follow these steps:

1. In the System Navigator, click **Request Fulfillment > Request Queue** or **Search Requests**.
2. Locate and open the request record that you want to close.
3. Click the **Close** button.
4. Enter or change the subcategory for the request.
5. Select the appropriate closure code.
6. Enter the closure comments.
7. Click **Finish**. The request record is now successfully closed.

Note: You can add parts and labor costs tracking to an incident, problem, change, or request or to any associated task of a record. To do this, navigate to the **Cost** tab, specify the currency, and then specify the date, part number, and quantity for any parts used. Alternatively, specify the date, technician name (used to derive the rate from the operator record), and hours worked for any labor. Service Manager will automatically calculate and roll up costs from any sub tasks into the **Total cost** field on the **Costs** tab.

Reopen a request record

Security Role: Request Coordinator

From the Closure phase in the Request workflow, if you have the "Reopen" right in the "Request" area, you can click the **Reopen** button to reopen the closed request. After you click **Reopen**, the request is moved back to the Review phase.

To reopen a request, follow these steps:

1. In the System Navigator, click **Request Fulfillment > Request Queue** or **Search Requests**.
2. Locate and open the request record in the Closure phase that you want to reopen.
3. Click **Reopen**. The request is now moved back to the Review phase. When the request is re-opened, the original tasks will not be re-activated.

Access Request Fulfillment reports

Security Roles: Request Manager; Request Coordinator

The Reporting tool in HP Service Manager provides a number of out-of-box reports on the request data in your system. You can view these reports through a dashboard named **Request Overview (Global)**. You can also create your own dashboards to display other reports of your interest.

To access Request Fulfillment reports, follow these steps:

1. Click **Request Fulfillment > Request Overview**.

By default, the **Request Overview (Global)** dashboard is displayed.

2. View the reports on the dashboard. For descriptions of these reports, see "[Report descriptions and usage](#)" on page 1.
3. If needed, click the **New Dashboard** button to add your own dashboards. For details, see "[Create a dashboard](#)" on page 1.

Your custom dashboards are added to the dashboard list on the toolbar of the dashboard page.

Tip: You can click **Export** to export the reports on a dashboard to PDF format.

4. Click the **Open dashboard settings** icon on a dashboard to set its properties, or click the **Set as Default Dashboard** button to set it as your default dashboard.

Request Task workflows and user tasks

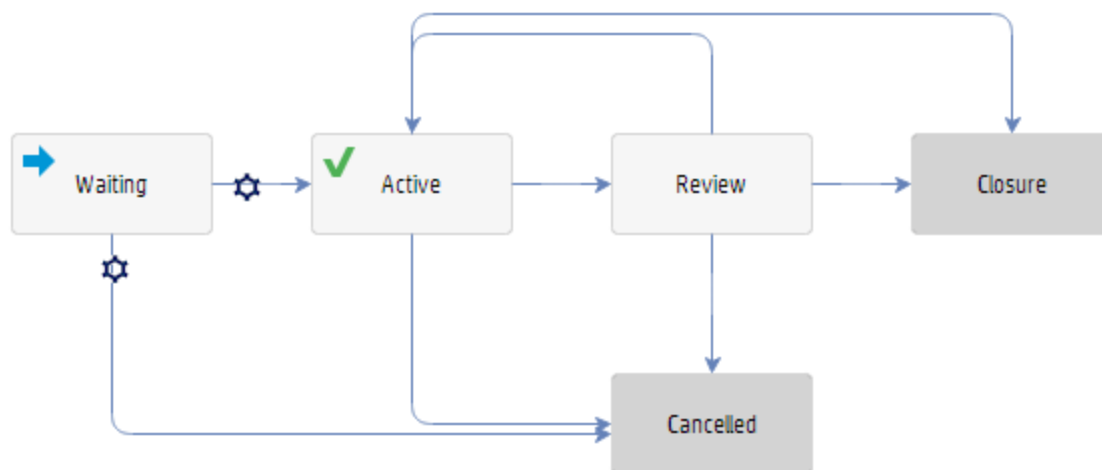
The request task workflow is a sequence of connected steps in the life cycle of a request task. In the workflow, a request task goes through several phases to complete the life cycle.

The following are the out-of-box workflows for request tasks:

Generic Request Task

The Generic Request Task workflow manages the process for generic request tasks without CMDB update, such as manual labor for internal vendors/suppliers.

The Generic Request Task workflow consists of the following phases and tasks.



Workflow phase	Tasks
Waiting	<ul style="list-style-type: none">• Create a request task• Create a request task template• Send a notification from a request task

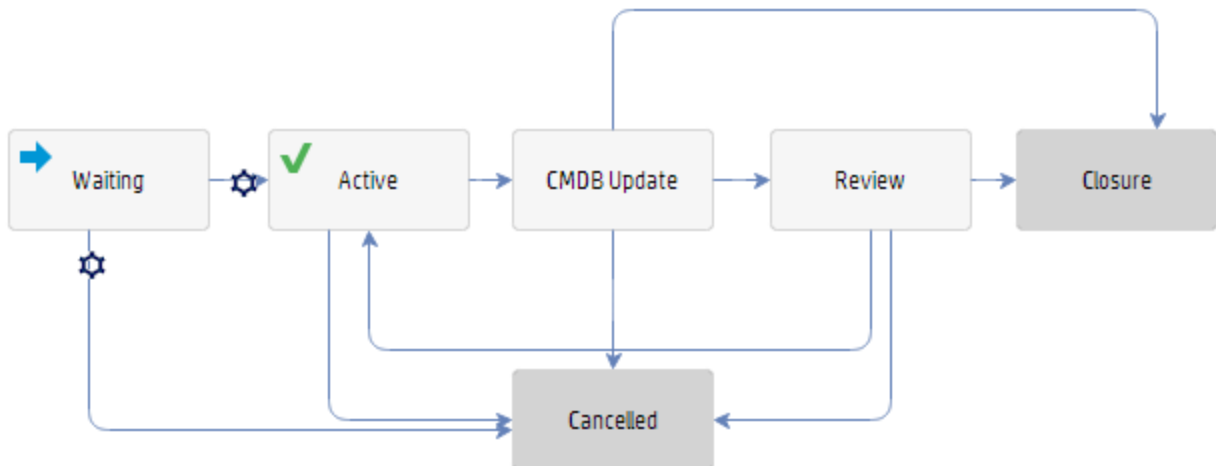
Workflow phase	Tasks
Active	<ul style="list-style-type: none">• Apply a request task template• Create a request task template• Create a change from a request task• Update multiple request tasks• Cancel multiple request tasks• Send a notification from a request task• Set a reminder for a request task• Access the alert log when viewing a request task• View audit log from a request task
Review	<ul style="list-style-type: none">• Update multiple request tasks• Cancel multiple request tasks• Send a notification from a request task• Set a reminder for a request task• Access the alert log when viewing a request task• View audit log from a request task• Create a request task template
Closure	<ul style="list-style-type: none">• Close a request task• Send a notification from a request task• Access the alert log when viewing a request task• View audit log from a request task• Create a request task template

Workflow phase	Tasks
Cancelled	<ul style="list-style-type: none"> • Send a notification from a request task • Access the alert log when viewing a request task • View audit log from a request task • Create a request task template

Request Task with CMDB Update

The Request Task with CMDB Update workflow manages the process for request tasks that involve CMDB updates such as installation, uninstallation, purchase, and reservation services.

The Request Task with CMDB Update workflow consists of the following phases and tasks.



Workflow phase	Tasks
Waiting	<ul style="list-style-type: none"> • Create a request task • Create a request task template • Send a notification from a request task

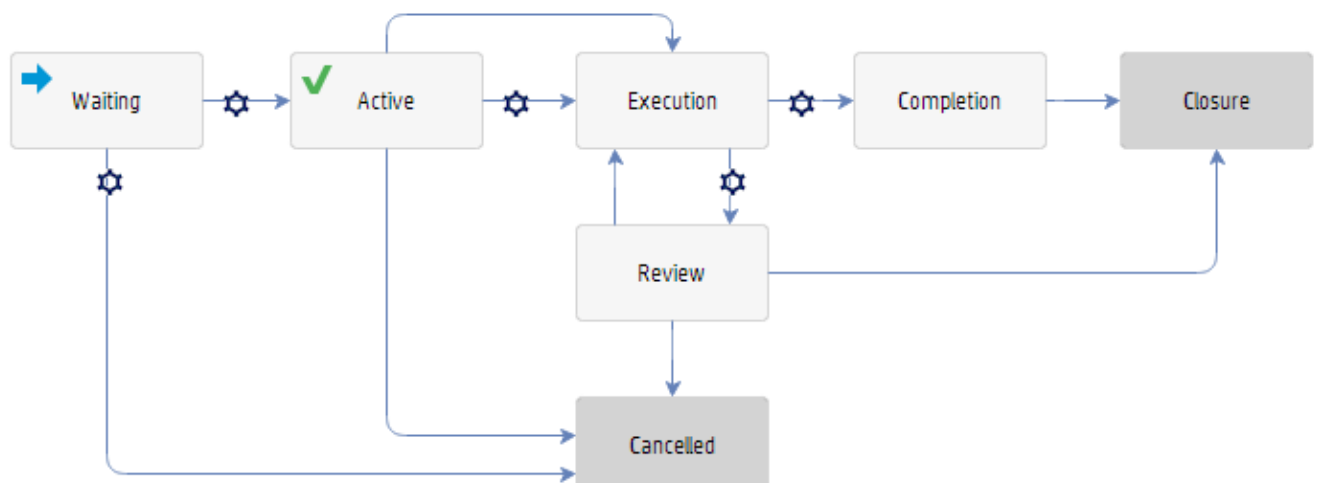
Workflow phase	Tasks
Active	<ul style="list-style-type: none">• Apply a request task template• Create a request task template• Create a change from a request task• Update multiple request tasks• Cancel multiple request tasks• Send a notification from a request task• Set a reminder for a request task• View audit log from a request task• Access the alert log when viewing a request task
CMDB Update	<ul style="list-style-type: none">• Send a notification from a request task• Set a reminder for a request task• Access the alert log when viewing a request task• View audit log from a request task• Create a request task template
Review	<ul style="list-style-type: none">• Send a notification from a request task• Set a reminder for a request task• View audit log from a request task• Access the alert log when viewing a request task• Update multiple request tasks• Create a request task template

Workflow phase	Tasks
Closure	<ul style="list-style-type: none"> • Close a request task • Send a notification from a request task • View audit log from a request task • Access the alert log when viewing a request task • Create a request task template
Cancelled	<ul style="list-style-type: none"> • Send a notification from a request task • View audit log from a request task • Access the alert log when viewing a request task • Create a request task template

Automated Task

The Automated Task workflow manages the Operations Orchestration (OO) flow execution process. For more information on the Automated Task integrated with the OO flow, see ["Automated fulfillment of request tasks" on page 1](#).

The Automated Task workflow consists of the following phases and tasks.



Workflow phase	Tasks
Waiting	<ul style="list-style-type: none">• Create a request task• Create a request task template• Send a notification from a request task
Active	<ul style="list-style-type: none">• Apply a request task template• Create a request task template• Update multiple request tasks• Cancel multiple request tasks• Send a notification from a request task• Set a reminder for a request task• View audit log from a request task• Access the alert log when viewing a request task
Execution	<ul style="list-style-type: none">• Send a notification from a request task• Set a reminder for a request task• View audit log from a request task• Access the alert log when viewing a request task• Create a request task template
Review	<ul style="list-style-type: none">• Send a notification from a request task• Set a reminder for a request task• Update multiple request tasks• View audit log from a request task• Access the alert log when viewing a request task• Create a request task template

Workflow phase	Tasks
Completion	<ul style="list-style-type: none">• Send a notification from a request task• Set a reminder for a request task• View audit log from a request task• Access the alert log when viewing a request task• Create a request task template
Closure	<ul style="list-style-type: none">• Close a request task• Send a notification from a request task• Access the alert log when viewing a request task• Create a request task template
Cancelled	<ul style="list-style-type: none">• Send a notification from a request task• View audit log from a request task• Access the alert log when viewing a request task• Create a request task template

For examples that demonstrate the minimum needed steps to complete the out-of-box request task workflows, see ["Examples: request task workflows"](#) on the next page.

Examples: request task workflows

The following examples demonstrates the minimum needed steps to complete the following out-of-box request task workflows:

Generic Request Task workflow

Phase	User Actions	Options
Waiting	To move the task to the Active phase, complete the tasks that this task is dependent on and meet the conditions that are set for this task.	If the task condition is evaluated as “false”, the system moves this task to the Cancelled phase.
Active	<ol style="list-style-type: none">1. Enter information for the required fields.2. Complete the actual task as described in this request task record.	<p>From the Active phase, you can move the task to the following phases:</p> <ul style="list-style-type: none">• Cancelled: Click More > Cancel Task.• Review: Click the Review button for high priority tasks (1-Critical or 2-High). <div>Note: High priority tasks (1-Critical or 2-High) must be reviewed before closure.</div> <ul style="list-style-type: none">• Closure: Click the Close Task button for low priority tasks (3-Average or 4-Low).

Phase	User Actions	Options
Review	<ol style="list-style-type: none"> 1. Click the Review button. 2. Review the data entered for the request task. 	<p>From the Review phase, you can move the task to the following phases:</p> <ul style="list-style-type: none"> • Fulfillment: Click the Back to Fulfill button. • Cancelled: Click More > Cancel Task. • Closure: Click the Close Task button.
Cancelled	To move the task to the Cancelled phase, click More > Cancel Task .	
Closure	<ol style="list-style-type: none"> 1. Click the Close Task button. 2. Select the appropriate Closure Code. 3. Enter the Closure Comments. 4. Select the date on which the task is finished. 5. Click Finish. 	

Request Task with CMDB Update workflow

Phase	User Actions	Options
Waiting	To move the task to the Active phase, complete the tasks that this task is dependent on and meet the conditions that are set for this task.	If the task condition is evaluated as “false”, the system moves this task to the Cancelled phase.

Phase	User Actions	Options
Active	<ol style="list-style-type: none"> 1. Change the status to In Progress. 2. Update the information for the required fields if needed. <p>For the "Purchase" task, follow steps:</p> <ol style="list-style-type: none"> a. Enter the purchase information in the Purchase tab, and then click Save. b. Click the Receive button, and then review and update the CI details in the receiving form. 	<p>From the Active phase, you can move the task to the Cancelled phases by clicking More > Cancel Task.</p>
CMDB Update	<ol style="list-style-type: none"> 1. Click the Update CMDB button. 2. Review and update the CI information. 3. On the CI Update History tab, do one of the following: <ul style="list-style-type: none"> ■ For purchase tasks, click Submit to CMDB. ■ For other tasks, click Update CMDB 4. Click Yes to confirm the CMDB update. <p>Note: For more information, see "Updating CMDB" on page 72</p>	<p>From the CMDB Update phase, you can move the task to the following phases:</p> <ul style="list-style-type: none"> • Cancelled: Click More > Cancel Task. • Review: Click the Review button for high priority tasks (1-Critical or 2-High). <p>Note: High priority tasks (1-Critical or 2-High) must be reviewed before closure.</p> <ul style="list-style-type: none"> • Closure: Click the Close Task button for low priority tasks (3-Average or 4-Low).

Phase	User Actions	Options
Review	<ol style="list-style-type: none"> 1. Click the Review button. 2. Review the data entered for the request task. 	<p>From the Review phase, you can move the task to the following phases:</p> <ul style="list-style-type: none"> • Fulfillment: Click the Back to Fulfill button. • Cancelled: Click More > Cancel Task. • Closure: Click the Close Task button.
Cancelled	To move the task to the Cancelled phase, click More > Cancel Task .	
Closure	<ol style="list-style-type: none"> 1. Click the Close Task button. 2. Select the appropriate Closure Code. 3. Enter the Closure Comments. 4. Select the date on which the task is finished. 5. Click Finish. 	

Tip: To check the activity log for a request task record, go to the **Activities** section of the record. The **Activities** section enables you to enter new updates or view journal updates and logged activities such as "Open" and "Update" for a record. For more information, see ["Activities section" on page 1](#).

Create a request task

Security Roles: Request Coordinator, Request Analyst

After a request is created, you can create tasks to fulfill the request.

To create a request task, follow these steps:

1. In the System Navigator, click **Request Fulfillment > Request Queue** or **Search Requests**.
2. Locate and open the request record for which you want to create a task.
3. From the **Tasks** section, click the **Edit** button to open Task Planner.
4. Click **Add Task**.
5. Type a title for the new task.
6. Select a category for the new task.
7. Select a phase to define when the new task will be opened for fulfillment.
8. Select a phase to define by which the new task must be closed.
9. Complete the form with other information if needed, and then click **Save**.

Note: You can add parts and labor costs tracking to an incident, problem, change, or request or to any associated task of a record. To do this, navigate to the **Cost** tab, specify the currency, and then specify the date, part number, and quantity for any parts used. Alternatively, specify the date, technician name (used to derive the rate from the operator record), and hours worked for any labor. Service Manager will automatically calculate and roll up costs from any sub tasks into the **Total cost** field on the **Costs** tab.

For detailed instructions on using Task Planner, see ["The Task Planner" on page 1](#).

Create a request task template

Security Role: Request Manager

Templates enable users to quickly complete request task records by automatically populating various fields with necessary information. You can create as many templates as you need while authorizing select user roles for each template. The users authorized to use a particular template will then be able to apply that template when completing a request task.

You can create a request task template either from the system navigator menu (**Tailoring > Templates**) or directly from an existing request task record.

To create a request task template from the system navigator menu, follow these steps:

1. Click **Tailoring > Templates**.
2. Click **New**.
3. Type a name in the **Template name** field.
4. Select **Request Task** in the **Table name** field, and then click **Next**.
5. Click **Fill** for each role that you are authorizing to use this template.
6. Modify the fields as required to meet the needs of your template by clicking the field to assign a value.
7. Click **Add**. The roles that are authorized for this template can now use or modify this template.

To create a template from an existing request task record, follow these steps:

1. Click **Request Fulfillment > Search Request Tasks**, and then search for the record that you want to create a template from.
2. From the request task record, click **More** or the More Actions icon, and then select **Create Template from Record**.

Note: To use this action, you must have the “Modify Template” right in the “Request Tasks” area.

3. Edit the name in the **Template name** field.

4. Modify the fields as required to meet the needs of your template by clicking the field to assign a value.
5. Click **Add**. The roles that are authorized for this template can now use or modify this template.

Apply a request task template

Security Role: Request Analyst

Templates enable you to quickly complete a request task record by automatically populating fields with the applicable information. You can apply a template when completing a request task if you are authorized to use that particular template.

Note: Make sure that the “Supports Templates” option is enabled in the request task object.

To apply a template to a request task, follow these steps:

1. Click **Request Fulfillment > Search Request Tasks**, enter your search criteria, and then click **Search**.
2. Select the request task record to which you want to apply a template.
3. From the request task record, click **Apply Template**. The Select Request Task Template wizard opens.

Note: The **Apply Template** action is available in the “Active” and “Review” phases. To run this action, you must have the “Update” right in the “Request Tasks” area.

4. Click the template that you want to apply to the selected request task. You are returned to the selected request task record and the fields are automatically filled in with the values set in the template.

Tip: Users authorized to use this template can also modify the template to meet their needs.

5. Modify other fields, as needed.
6. Click **Save & Exit**.

Create a change from a request task

Security Roles: Request Coordinator, Request Analyst

You can create a change record directly from a request task, so that the request task can be fulfilled by this change.

This action is only available in the “Active” phase. Users who have the “New” right in the “Change” area are authorized for this action.

To create a change from an existing request task, follow these steps:

1. Click **Request Fulfillment** > **Search Request Tasks**, enter your search criteria, and then click **Search**.
2. Open the request task record that you want to create a change from.
3. From the request task record, click **More** or the More Actions icon, and then select **Create Change**.
4. Select a change model or a category for the change.
5. Edit the values or type necessary information in the change record.

Note: The values in following fields are copied from the request task: title, description, impact, company, and folder.

6. Click **Save**

A new change record is created and linked to the request task.

Update multiple request tasks

Security Roles: Request Analyst

You can use the mass update feature to update one or more values in multiple request tasks. When you perform a mass update, the value that you enter for a particular field becomes the value for that field in all the records that you selected.

In addition, you can use complex update to enter expressions as instructions to perform actions on multiple request tasks.

To update multiple request tasks by using **Mass Update**, follow these steps:

1. Locate the records by using one of the following methods:
 - Click **Request Fulfillment** > **Request Task Queue** to display a list of records.
 - Click **Request Fulfillment** > **Search Request Tasks**, and then search for the records.
2. Select the records that you want to update.
3. Click **Mass Update**.
4. Click the field that you want to update.
5. Type the value for the field or use the Find feature to display a list of potential values for the field, and then click **Next**.
6. Repeat steps 4 and 5 for additional fields as needed.
7. Click **Execute**.

To update multiple request tasks by using **Complex Update**, follow these steps:

1. Locate the records by using one of the following methods:
 - Click **Request Fulfillment** > **Request Task Queue** to display a list of records.
 - Click **Request Fulfillment** > **Search Request Tasks**, and then search for the records.
2. Select the records that you want to update.
3. Click **Mass Update**.
4. Click **Complex Update**.
5. Follow the instructions in the complex update form and type the expressions.
6. Click **Execute**.

Cancel multiple request tasks

Security Roles: Request Analyst

You can use the mass cancel feature to cancel one or more values in multiple request tasks.

Users with the “Expert” right in the “Request Tasks” area are authorized to run this action.

To cancel multiple request tasks by using **Mass Cancel**, follow these steps:

1. Locate the records by using one of the following methods:
 - Click **Request Fulfillment > Request Task Queue** to display a list of records.
 - Click **Request Fulfillment > Search Request Tasks**, and then search for the records.
2. Select the records that you want to cancel.
3. Click **Mass Cancel**.
4. Click **Yes**.
5. Enter your closure comments, and then click **Finish**.

Set a reminder for a request task

Security Roles: Request Coordinator, Request Analyst

You can set a reminder to notify you if an existing request task record meets certain conditions by a specified time. For example, you may want to be reminded if a request task is still open or is not updated by a given date.

To set a reminder for a request task, follow these steps:

1. Click **Request Fulfillment > Search Request Tasks**, enter your search criteria, and then click **Search**.
2. Open the request task record to which you want to set a reminder.
3. Click **More**, and then select **Set Reminder**.
4. Do one of the following to set the time when the reminder occurs:
 - Click **Remind At** to set a reminder for a particular day and time.

Tip: Click **Fill** to display a calendar where you can select the date and time for the reminder.

- Click **Remind In** to set the reminder to occur at a particular interval. If you choose this option, specify the time interval (in 00:00:00 format), and select a shift from the **Based On** list.

5. In the **Remind if** field, select a condition for the reminder to occur:
 - **Always.** (the default value)
 - **Request task has not been updated.**
 - **Request task is still open.**
 - **Request task is still assigned to me.**
6. In the **Pop-up Message** area of the form, select the type of notification you want to receive.
7. If you select **Pop-up** or **Page**, type the reminder message in the **Message** field that you want to appear in the reminder.
8. If you select **Email** or **SM Mail**, follow these steps:
 - a. Type a title for the mail in the **Title** field.
 - b. Select the type of mail message s in the **Message Type** area:
 - Click **Send Request Task Record** to include a copy of the request task record in the email.
 - Click **Fixed Text**, and then type the message you want to appear in the email.
9. Click **OK**.

Send a notification from a request task

Security Roles: Request Coordinator, Request Analyst

You can send a notification to one or more recipients in a particular request task phase.

This "Notify" action is available in all request task phases. Users who have the "View" right in the "Request Tasks" area can run this action.

To send a notification from a request task record, follow these steps:

1. Click **Request Fulfillment > Search Request Tasks**, enter your search criteria, and then click **Search**.
2. Open the request task record from which you want to send a notification.
3. Click **More**, and then click **Notify**.

4. Select the date and time to send this notification.
5. Add one or more recipients to the **To** text box, or type an assignment group in the **Group** text box.
6. Select one of the following notification methods:
 - **Mail:** Uses the internal Service Manager Mail application (not email).
 - **Email:** Uses the Service Manager email application.
 - **Fax:** Requires that the SCAuto Fax adapter be configured. This option is obsolete because SCAuto Fax is obsolete.
7. Modify the subject and the message in the notification as needed.
8. Click **Send**.

View audit log from a request task

Security Role: Request Analyst

Field value changes in a request or request task record can be monitored by audit application if it is enabled.

A global setting “Audit Records” to enable or disable audit application is available in **Request Fulfillment > Administration > Settings**. When the setting value is set to “true”, the audit application will run when a request or request task is created, updated or closed. Otherwise, audit application will be skipped.

The View Audit Log action enables users to view the audit log of the current request task record. This View Audit Log action is available in all request task phases. The user who has the “Expert” right in the “Request Tasks” area is allowed to run this action.

The following table lists the out-of-box audit specification for the request task table.

Audit File	Audit Fields
request task table	Phase
	Status
	Assignment Group
	Assignee
	Part No
	Planned Lead Time
	Actual Lead Time

To view the audit log of a request task, follow these steps:

1. Click **Request Fulfillment > Search Request Tasks**, enter your search criteria, and then click **Search**.
2. Open your desired request task record.
3. Click **More**, and then select **View Audit Log**.

Access the alert log when viewing a request task

Security Roles: Request Analyst

The alert log is a file that lists currently scheduled and active alerts.

To access the alert log when viewing a request task, click **More** from the record that you are viewing, and then click **View Alert Log**.

Close a request task

Security Roles: Request Analyst

After you fulfill and review a request task, you can close the request task record.

To close a request task, follow these steps:

1. In the System Navigator, click **Request Fulfillment > Request Task Queue** or **Search Request Tasks**.

2. Locate and open the request task that you want to close.
3. Click the **Close** button.
4. In the **Closure Code** drop-down list, select an appropriate closure code.
5. In the **Closure Comments** field, enter the closure comments.
6. Select the date on which the task is finished.
7. Click **Finish**. The request task record is now successfully closed.

Request task scheduling

- **Expected Finish Date**

Expected Finish Date in request records reflects the expected delivery date from the end user perspective.

If the delivery target is defined when ordering service catalog items or bundles, the value of Expected Finish Date in the request record will be calculated as the request creation time (submit.date) plus the delivery target.

If the delivery target is not specified when ordering the service catalog items or bundles, or the request is an off-catalog request, the IT operator needs to manually fill in the Expected Finish Date on behalf of the requester.

- **Delivery Date**

The Delivery Date reflects the planned delivery date from the fulfillment perspective.

The Delivery Date in requests is set based on the request creation time plus the Global Lead Time defined in request model. Once the request record is created, the Delivery Date cannot be changed.

- **Global Lead Time**

In request records, the Global Lead Time is copied from the request model and is read-only in request records.

In request models, you can specify the Global Lead Time. The reasonable scope for the value of Global Lead Time is greater than the longest task Planned Lead Time (considering task dependency) and less than sum of the planned lead time of all the tasks. If your specified value is not in this range, an error message is displayed and you cannot save the request model.

If the value of Global Lead Time in request model is blank, once the request model is saved, the Global Lead Time will be auto-calculated from task Planned Lead Time based on task plan.

- **Planned Lead Time**

In request tasks, the planned lead time is populated according to the setting in the request model and it is read-only in request tasks.

In request models, the value of the planned lead time can be set manually when planning tasks.

- **Planned Start Date and Planned End Date**

If the Global Lead Time is not zero, the Planned Start Date and Planned End Date of a request task are calculated by starting from the request "Delivery Date" and counting upstream from the last task to the first one according to the task plan. Task dependency and planned lead time will be considered. If the Global Lead Time is zero, they will be calculated based on the Expected Finish Date.

If you adjust the task plan in a request, such as adding or deleting tasks, the Delivery Date and Expected Finish Date of the request are not changed but the Planned Start Date and Planned End Date for all the tasks are re-calculated based on the Delivery Date (or Expected Finish Date) and the updated task plan.

- **Contractual Lead Time**

Contractual Lead Time is defined in request task records. By default, Contractual Lead Time equals to Planned Lead Time. If the Contractual Lead Time is adjusted by authorized operator, the Planned Start Date and Planned End Date will be re-calculated accordingly.

If the changed Contractual Lead Time is longer than Planned Lead Time, the request fulfillment SLA might be affected as Global Lead Time might be enlarged due to the change. In this case, a warning message is displayed to operator.

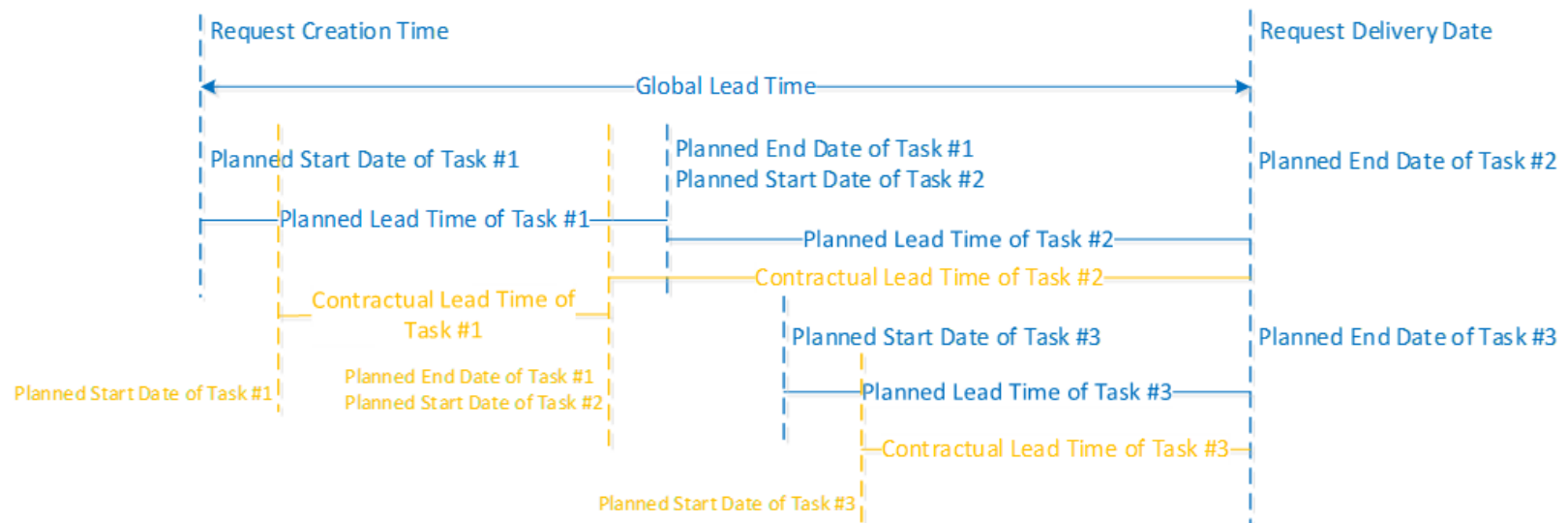
- **Actual Start Date**

The Actual Start Date in the request task record is auto-populated when the request task is activated.

- **Actual End Date**

The Actual End Date in the request task record is manually provided by the task assignee when the request task is completed.

The following figure illustrates the task scheduling process in the request fulfillment module.



Updating CMDB

In the out-of-box system, a "CMDB Update" phase is defined in the "Request Task with CMDB Update" request task workflow. This workflow is used by several out-of-box request task categories. When a request task in these task categories moves to the CMDB Update phase, users can update the CI information in a dedicated CMDB update form corresponding to the specific task category. After the CMDB update, the CI status in CMDB will be updated accordingly.

The following table describe the task categories that require CMDB update, the associated forms with the CI queries, and the corresponding CI status after CMDB update.

Task Category	Request Category	Associated form	CIs for CMDB update	CI Status after CMDB update
Purchase	Generic Request	rm.requestTask.CI.Creation.form	Lists the received CIs to be created	Reserved
Reservation	Generic Request	rm.requestTask.CI.Reservation.form	Pick up existing CIs from CMDB: "istatus='In Stock' and owner=department name of requested.for in parent request"	Reserved
Installation	Generic Request	rm.requestTask.CI.Installation.form	Either use the CI list reserved by prior task, or pick up the existing CIs from CMDB: "istatus='Reserved' and owner=the department name of requested.for in parent request"	In Use

Task Category	Request Category	Associated form	CIs for CMDB update	CI Status after CMDB update
Uninstallation	Generic Request	rm.requestTask.CI.Uninstallation.form	Pick up existing CIs from CMDB: “istatus='In Use' and owner=the department name of requested.for in parent request”	Retired
Purchase	Order	rm.requestTask.CI.Creation.form	Lists the received CIs to be created	In Stock

Note: If the number of CIs to be updated is no more than 50, the CMDB update will be executed in foreground. To avoid potential performance issue, if the number of CIs is greater than 50, a background schedule record will be generated to update CMDB.

Request Fulfillment administration

Request Fulfillment administration consists of the following:

- **Environment:** This environment record contains options that defines the functionality of the Request Fulfillment application for all Request Fulfillment users. For example, you can set the formats of request number and request task number.
- **Settings:** You can configure the general settings for the Request Fulfillment module. For example, you can configure to create a new request either by selecting a category or by selecting a request model.

Configure the Request Fulfillment environment

Security Roles: System Administrator

To configure Request Fulfillment environment settings, follow these steps:

1. Click **Request Fulfillment > Administration > Environment** in the System Navigator.
2. Configure the following environment settings as needed.

Setting	Description
Delay Assigning Request Number?	Defines whether or not the system delays assigning the request number until you save the record.
Skip Inefficient Query Warning?	Normally, it is desirable to warn an operator when they have entered an inefficient (partially or non-keyed) query. If you want to bypass the warning, select this check box.
Use Operator Full Name?	Defines whether or not the operator full name is used when time stamping reports (on open, update, and so on) for records in the application environment.
Request Number Controls	Defines the format of request number. See "Number controls" on the next page .

Setting	Description
Request Task Number Controls	Defines the format of the request task number. See "Number controls" below .
Unique Number Length	Defines the length of the unique number. Note: This setting only takes effect on the Parent No/Unique No (PPNNNN) option in Request Task Number Controls.
Separator	Defines the separator that is used in Request Number Controls and Request Task Number Controls.

3. Click **Save**.

Number controls

Number controls determine how your requests or request tasks will be numbered.

Option	Description
Yr/Unique No (YYNNN)	The current year (system-calculated), followed by a unique sequential number.
Yr-Mo/Unique No (YYMMNNN)	The current year and current month (system-calculated), followed by a unique sequential number.
Julian/Unique No (YYDDNNN)	The current Julian date (system-calculated), followed by a unique sequential number.
Unique Number Only	A unique number without prefixes or suffixes.
Parent No/Unique No (PPNNNN)	The parent request number, followed by a unique sequential number determined. This option is only available for request task number control.

Configure the Request Fulfillment settings

Security Roles: System Administrator

To configure Request Fulfillment settings, follow these steps:

1. Click **Request Fulfillment > Administration > Settings** in the System Navigator.
2. Configure the following settings as needed.

Setting	Description
Audit Records	<p>The changes of field values in requests or request tasks can be monitored by the audit application.</p> <p>You can use this setting to enable or disable the audit application for requests and request tasks.</p>
Select on Open	<p>You can choose to open a new off-catalog request either based on category or based on request model.</p> <p>Default: Request Model</p>
Group Request Model By	<p>To configure the request model hierarchy, type up to four column names to group the request models in the Group Request Model By text box. For example, to group request models by category and template, type <code>category, request.template</code>.</p> <div><p>Note:</p><ul style="list-style-type: none">■ The request model hierarchy configuration takes effect only when Request Model is under Select on Open.■ Use the column names specified in the <code>requestModel</code> table.■ You can configure at most four levels in the request model hierarchy by specifying the column names in a comma separate list.</div>

3. Click **Save**.

Notifications in Request Fulfillment

Request Fulfillment includes the following out-of-box notifications, which are sent in response to certain events.

Request Fulfillment help topics for printing

Request Fulfillment administration

["Request Notifications" on page 1](#)

["Request Task Notifications" on page 1](#)

Request Fulfillment configuration

Request Fulfillment configuration enables you to configure alerts, approvals, assignment groups, product catalog, request categories, request task categories, request models, workflows, and so on.

Create a request model

Security Roles: Request Process Owner

A request model defines the prerequisites, required authorizations, and standard activities to fulfill a service request. When you create a request based on a request model, all information in the request model is added automatically to the request. In addition, you can plan fulfillment tasks with sequencing and dependencies by using the task planner in request model.

HP Service Manager provides the following out-of-box request models:

- New Employee On-boarding
- Employee Off-boarding
- Password Reset
- Software Package
- Order Hardware
- Application Access
- Sharepoint Access
- Request for Information
- Order

Different request models contain different pre-defined tasks for operators to fulfill the corresponding requests for end users.

To create a new request model, follow these steps:

1. From the System Navigator, click **Request Fulfillment > Configuration > Request Models**.
2. Click **New**.

Tip: Alternatively, you can create a new request model based on an existing request model. To do this, open an existing request model, and then click **More > Copy Request Model**. The request and task plan information in the original request model is copied to the new request model for your further modification. In addition, you can change the category in the new request model as needed.

3. Enter the request model ID.
4. Enter the request model name.
5. (Optional) Enter the request model description.
6. Click the **Fill Field Category** icon in the **Category** text box to select a request category.

Note: After the request model is created, you cannot change the category specified in the request model. If you want to change the category, you can create a new request model.

7. Click the **Fill Field SubCategory** icon in the **SubCategory** text box to select a request subcategory.
8. (Optional) Clear the **Active** check box if you want to disable this new request model so that it is not available for selection when users create new request records.
9. (Optional) Select request templates from the **Request Template** drop-down list.

If needed, you can specify more than one template. When users open a new request with this model, Service Manager automatically applies all specified templates in the order listed by merging their field values. The following table lists two example templates and their merged result.

Sequence of Template	Field	Value
1	Description	Install Windows Vista on new employee's laptop
	Brief Description	Install Windows Vista
	Assignment Group	(empty)

Sequence of Template	Field	Value
2	Description	(empty)
	Brief Description	Install Windows 7
	Assignment Group	Hardware
Merge Result	Description	Install Windows Vista on new employee's laptop
	Brief Description	Install Windows 7
	Assignment Group	Hardware

10. (Optional) Select allowed roles from the **Allowed Roles** drop-down list.
11. (Optional) In the **Approvals** section, select the required approvals and set the request phases that the approvals apply to.

Note: Besides request models, you can also define Approvals on the workflow phases. If you have Approvals defined in both places, they both take effect.

12. (Optional) Add other information if needed, such as cost, department, and currency.
13. (Optional) Use task planner to add tasks in the request model. For more information, see ["Using the Task Planner" on page 1](#).
14. (Optional) Specify the global lead time. For more information, see ["Request task scheduling" on page 69](#).
15. Click **Save**.

Create a request category

Security Role: Request Manager

If you are an HP Service Manager Administrator, you may want to create a request category. To do this, you can modify an existing category record, or you can create a new category record. HP Service Manager provides the following out-of-box category records that you can use or modify:

- Generic Request
- Order

To create new category record, follow these steps:

1. Click **Request Fulfillment > Configuration > Request Categories**.
2. Click **New**.
3. Enter the name of the request category.
4. Clear the **Active** check box if you do not want the new category to appear in the category list.

Note: By default, the **Active** check box is selected. If you clear the **Active** check box, this category cannot be used to create new requests.

5. Enter the category description.
6. Select a workflow for the category.
7. Click **Save**.

The new request category is created and the subcategories tab is displayed.

8. If you want to create a new subcategory for this request category, go to the **Subcategories** tab, and then click the **Link New Subcategories** button to create a new subcategory.

Note: To avoid breaking existing request records, the system does not allow you to delete the existing request categories or edit their names.

Add a subcategory to a request category

Security Role: Request Manager

Request subcategory specifies the second level of classifying a Service Request. You can add a new subcategory to a request category directly. Additionally, you can view a list of the subcategories that are associated with the current category, together with the record details for each subcategory.

In the out-of-box system, the following subcategories are available for the “Generic Request” category:

- Employee Off-boarding
- Employee On-boarding
- Hardware
- Others
- Request for Administration
- Request for Access
- Request for Information
- Software

The following subcategory is available for the “Order” category :

- Order

To add a new subcategory for a request category, follow these steps:

1. Click **Request Fulfillment > Configuration** in the system navigator.
2. Click **Request Categories > Search**.
3. Select the request category to which you want to add a subcategory.
4. Under the **Subcategories** tab, click the **Link New Subcategories** button.
5. Type a name for the new subcategory.
6. Type a description for the subcategory.
7. Clear the **Active** check box if you do not want the new subcategory to appear in the subcategory list. If you clear the **Active** check box, this subcategory cannot be used in request records.
8. Click **Save** to add the new subcategory.

Create a request task category

Security Role: Request Manager

If you are an HP Service Manager administrator, you may want to create a request task category. To do this, you can modify an existing category record, or you can create a new category record. HP Service Manager provides the following out-of-box category records that you can use or modify:

- Purchase
- Reservation
- Labor
- Installation
- Uninstallation
- Automation

To create a new request task category record, follow these steps:

1. Click **Request Fulfillment**.
2. Click **Configuration > Request Task Categories**.
3. Click **New**.
4. Type the name of the request task category.
5. Clear the **Active** check box if you do not want the new category to appear in the category list. If the **Active** check box is cleared, the new category is not available when you plan a new task in task planner.
6. Type a description of the request task category.
7. Select a workflow for the category.

The **Workflow** tab is displayed.

8. Click **Save**.

Note: To avoid breaking existing request task records, the system does not allow you to delete the existing request task categories or edit their names.

Create a product catalog category

Security Role: Request Manager

You can define product catalog categories so that users can find their desired product catalog items easily. Product catalog items are organized in product catalog categories.

To create a product catalog, follow these steps:

1. Click **Request Fulfillment > Configuration > Product Catalog Categories**.
2. Click **New**.
3. In the **Name** field, type a name for the product catalog category.
4. Clear the **Active** check box if you do not want the new category to appear in the category list.

Note: If you clear the **Active** check box, this category cannot be used to create new product catalogs.

5. (Optional) In the **Description** field, type a description for the product catalog category.
6. Click **Save**.

Create a product catalog item

Security Role: Request Manager

A product catalog item is the actual product or service in the Request Fulfillment process.

To create a product catalog item, follow these steps:

1. Click **Request Fulfillment > Configuration > Product Catalog**.
2. Click **New**.
3. In the **General** tab, type the information in the following fields:

- **Part No.:** The unique identifier of the particular component.
 - **Brief Description:** A brief description of the product catalog item.
 - **Manufacturer:** The manufacturer of this component.
 - **Model:** The model name of the component, which is usually defined by the manufacturer.
 - **Product Catalog Category:** The category that this product catalog item belongs to.
4. (Optional) Add information in other fields in the **General** tab if needed. For example, you can configure the following fields for CI updates.
- **Config. File:** Identifies the file name where corresponding CIs will be created. If it is left blank, the "device" file is used by default.
 - **CI Type:** Identifies the CI type of the corresponding CIs for the specific product catalog item.
5. (Optional) Add applicable information in the following tabs:
- **Vendors:** Stores specific vendor/supplier information for a product.
 - **Receiving Information:** Defines how to generate record in Request Fulfillment receiving log.
 - **Receiving Format:**

Specifies the form that is presented during receiving process. If it is left blank, the default value "ocmlrec.receive.g" is used.
 - **Asset Tag # Name:**

When the product catalog item is received, a CI is automatically created. The logical.name of the CI is constructed by consulting the record (the record name is defined in Asset Tag # Name) in the "number" table.
 - **Field Name/Field Description/Required?/Default Value/Data Type:**

Defines additional CI attributes that will be assigned to the CIs during CI creation.
 - **Software:** Stores software information, such as licensing and installation information.

- **Current Quantities:** Displays quantities of items in different statuses for each stockroom.

Tip: To retrieve the latest amount of product catalog items in different statuses for each stockroom, click **More > Take Inventory**.

- **CI Information:** Lists all the CIs that correspond to this product catalog item in cmdb.

6. Click **Save**.

Stock management

As a sub-module in Request Fulfillment, stock management manages the stock information, including stock rooms, reorder rules, model vendors, and inventory configuration.

To access stock management, from the System Navigator, click **Request Fulfillment > Stock Management**. Then, you can access the following menu items for stock management.

- **Stock Rooms**

A stock room stores inventory information and generic information such as supporting locations and shipping address.

- **Reorder Rules**

You can create reorder rules by specifying reorder point and reorder amount for particular product catalog item in each stock room.

- **Model Vendors**

You can manage vendor/supplier information for particular product catalog item.

- **Inventory Configuration**

The configuration is referenced by the “Take Inventory” feature which calculates the amount of installed, reserved, available, and unavailable product catalog items in each stock room.

Create a reorder rule

Security Roles: Stock Manager

You can define reorder rules for particular product catalog items to facilitate or automate the reordering process.

To create a reorder rule, follow these steps:

1. In the System Navigator, click **Request Fulfillment > Stock Management > Reorder Rules**.
2. Click **New**. The Reorder Rule form is displayed.

3. Create the reorder rule according to the following table:

Setting	Description
Part No.	The part number of the product catalog item for which you want to create a reorder rule.
Min. Ord. Amount	The minimum order quantity for the product catalog item. If an operator requests less than this amount, the system will raise the requested amount to this amount.
Max. Ord. Amount	The maximum order quantity for the product catalog item. If an operator requests more than this amount, the system will lower the requested amount down to this amount.
Lot Size (Ord.)	The order amount is a multiple of this number. If not, the system will adjust it accordingly.
Unit/Measure	The standard unit of measure for the product catalog item. The valid values are defined in the “unitofmeasure” table.
Send email to Stock Manager/Generate order	<ul style="list-style-type: none"> ■ If Send email to Stock Manager is selected, a notification will be sent to the stock manager of the specific stockroom to inform the stock manager to create the order manually. If the stock manager for the specific stockroom is not specified, the default stock manager will be notified. ■ If Generate order is selected, an order record with a purchase task is automatically generated based on the “Order” request model and the order assignee is the stock manager of the specific stockroom. If stock manager of the specific stockroom is not specified, the default stock manager will be assigned.
Default Stock Manager	When the stock manager of the specific stockroom is not specified, the default stock manager will be notified or assigned.
Stockroom/Reorder Point/Reorder Amount	You can specify the reorder point and reorder amount for each stockroom.

4. Click **Save**. The reorder rule is created.

Add a Request Fulfillment assignment group

Applies to Security Roles:

System Administrator

A Request Fulfillment assignment group is a list of users who are responsible for a request record.

When a request or request task record opens or escalates, Request Fulfillment notifies the applicable group, which specifies the Request Coordinator, members, and approvers. Typically, assignment groups are organized by location and expertise. Assignment groups make the routing and escalation of request and request task records easier.

To add a Request Fulfillment assignment group, follow these steps:

1. Click **Request Fulfillment > Configuration > Assignment Groups**.
2. Type the name of the group in the **Assignment Group** field.
3. Provide the applicable information for the remaining fields on the **Group** tab.
4. Click the **Members** tab, and then type the operator that you want to assign to the member group.
5. Click the **Approvers** tab, and then type the operator that you want to assign to the approver group.
6. Click **Add**.
7. Click **OK**.

Add a Request Fulfillment approval definition

Applies to Security Roles:

System Administrator

The Approval Definition is a static file that defines the approval groups and the approval conditions.

An approval definition record defines the basics of an approval requirement. The approval condition for each requirement can be based on any field in the source record, such as cost and category.

To add a Request Fulfillment approval definition, follow these steps:

1. Click **Request Management > Configuration > Approval Definitions**.
2. In the **Name** field, type a unique name for this new record.
3. Add information on the form to set up the new approval definition record. For example, type an **Approval Description**, set the **Approval Type**, define approval condition, and add approval groups or operators.
4. Click **Add** to add the new record when you finish defining the approval definition.

Caution: When you are adding a new record from an existing record, make sure you do not click **Save**. Doing so will replace the existing record with the new record you are attempting to add.

Security

The topics in this section explain the Request Fulfillment security roles, security areas, and rights.

Request Fulfillment security areas

The security areas for Request Fulfillment are Request, Request Tasks, and Request Management Configuration. These areas contain the default security rights and settings for requests and request tasks in the Request Fulfillment module. The security rights and settings will be inherited by the new roles created in an area when no settings are specified in the security role.

Area	System navigator menu items for this area
Request	This area contains the default security rights and settings for requests. The rights will be copied to new roles created for this area. However, the settings will only be inherited if there are no settings specified on the role.
Request Tasks	This area contains the default security rights and settings for request tasks. The rights will be copied to new roles created for this area. However, the settings will only be inherited if there are no settings specified on the role.
Request Management Configuration	<p>This area contains the default security rights and settings for Request Fulfillment configuration. The rights will be copied to new roles created for this area. However, the settings will only be inherited if there are no settings specified on the role.</p> <p>Note: When you set the security rights for a security role in the Request Management Configuration area:</p> <ul style="list-style-type: none">• The View right is to view the settings defined in the Configuration menu.• The Update right is to update the values of existing settings defined in the Configuration menu.• The New and Delete rights are to create and delete a setting in the Configuration menu, such as category.• The Admin right enables operators to perform the administrative activities listed under the Administration menu of Request Fulfillment.

Default rights

When you create new security roles, they inherit the default rights that are defined in the security area. The following table describes the out-of-box rights that are defined in the Request, Request Tasks, and Request Management Configuration areas.

Area Name	View	New	Update	Delete/Close	Modify Template
Request	True	False	Never	Never	False
Request Tasks	True	False	Never	Never	False
Request Management Configuration	No rights				

Default settings

The default settings defined in areas will be inherited only if no value is specified for the settings on the role. In an out-of-box system, none of the default settings is checked or set in the Request, Request Tasks, and Request Management Configuration areas.

The follow table describe the details of the settings for the Request Fulfillment module.

Security Area	Setting (label)	Description
Request	Manager Group	Used by ApprovalDef: (mgr)/(MGR)
Request Request Tasks	Can Alternate Form	If selected (set to true), enables members of this role to select an alternate form for viewing the currently displayed record.
Request	Can Approve	If selected (set to true), enables members of this role to approve/deny requests/request tasks or retract previous approval/denial.
Request	Can Delegate Approvals	If selected (set to true), enables members of this role to delegate approvals.
Request Request Tasks	Skip Inefficient Query Warning	If selected (set to true), bypasses the inefficient query warning for members of this role; Normally, it is desirable to warn an operator when they have entered an inefficient (partially or non-keyed) query.

Security Area	Setting (label)	Description
Request Request Tasks	Append Query	A query for HP Service Manager to append to all queries run by members of this role.
Request Request Tasks	Initial Format	The name of the form to display when a member of this role first enters a given application.
Request Request Tasks	QBE Format	The QBE form to use when displaying records for members of this role.
Request	Request Initial View	The default view to display when the members of this role open the request queue.
Request	Request Queue Format	The default queue form to display when the members of this role open the request queue.
Request Tasks	Request Task Initial View	The default view to display when the members of this role open the request task queue.
Request Tasks	Request Task Queue Format	The default queue form to display when the members of this role open the request task queue.
Request	Edit Task Planner	If selected (set to true), enables members of this role to edit task planner in the request records.

Request Fulfillment security roles and settings

The out-of-box security roles for Request Fulfillment module include the following:

- Requestor
- Request Approver
- Request Coordinator
- Request Analyst
- Request Manager
- Request Process Owner
- Stock Manager

Out-of-box role rights

The following table describes the out-of-box security rights for the security roles on the areas in Request Fulfillment module.

Area Name	Role Name	View	New	Update	Delete/Close	Modify Template	Expert	Admin	Allowed Statuses	Allowed Categories
Request	Requestor	True	True	Never	Never	False	False	False	Blank	Blank
	Request Approver	True	False	Never	Never	False	False	False	Blank	Blank
	Request Coordinator	True	True	Always	Always	False	True	False	Blank	Blank
	Request Analyst	True	False	When assigned to workgroup	Never	False	False	False	Blank	Blank
	Request Manager	True	True	Always	Always	True	True	True	Blank	Blank
	Request Process Owner	True	True	Always	Always	False	False	False	Blank	Blank
	Stock Manager	False	False	Never	Never	False	False	False	Blank	Blank

Area Name	Role Name	View	New	Update	Delete/Close	Modify Template	Expert	Admin	Allowed Statuses	Allowed Categories
Request Tasks	Requestor	True	True	Never	Never	False	False	False	Blank	Blank
	Request Approver	True	False	Never	Never	False	False	False	Blank	Blank
	Request Coordinator	True	True	Always	Always	False	True	False	Blank	Blank
	Request Analyst	True	False	When assigned	When assigned	False	False	False	Blank	Blank
	Request Manager	True	True	Always	Always	True	True	True	Blank	Blank
	Request Process Owner	True	True	Always	Always	False	False	False	Blank	Blank
	Stock Manager	False	False	Never	Never	False	False	False	Blank	Blank

Area Name	Role Name	View	New	Update	Delete/Close	Modify Template	Expert	Admin	Allowed Statuses	Allowed Categories
Request Management Configuration	Requestor	True	False	Never	Never	False	False	False	N/A	N/A
	Request Approver	False	False	Never	Never	False	False	False	N/A	N/A
	Request Coordinator	True	False	Never	Never	False	False	False	N/A	N/A
	Request Analyst	False	False	Never	Never	False	False	False	N/A	N/A
	Request Manager	True	True	Always	Always	True	True	True	N/A	N/A
	Request Process Owner	True	True	Always	Always	False	False	False	N/A	N/A
	Stock Manager	True	True	Always	Always	False	False	False	N/A	N/A

For information about the out-of-box role rights in the Common Configuration area, see ["Out-of-box role rights in the Common Configuration area" on page 100](#).

The following table describes the out-of-box security rights for the Request Fulfillment security roles on the areas in other modules.

Note: The security roles in Process Designer Request Fulfillment have no rights on the areas that are not listed in the following table, including:

- Security
- Knowledge Administration
- Change Management Configuration
- Service Desk Configuration
- Incident Management Configuration
- Areas for Problem Management

Area Name	Role Name	View	New	Update	Delete/Close (delete)	Modify Template	Expert	Admin	Allowed Statuses	Allowed Categories
Change Incident	Requestor	True	False	Never	Never	False	False	False	Blank	Blank
	Request Approver	True	False	Never	Never	False	False	False	Blank	Blank
	Request Coordinator	True	True	Never	Never	False	False	False	Blank	Blank
	Request Analyst	True	True	Never	Never	False	False	False	Blank	Blank
	Request Manager	True	False	Never	Never	False	False	False	Blank	Blank
	Request Process Owner	True	False	Never	Never	False	False	False	Blank	Blank
	Stock Manager	False	False	Never	Never	False	False	False	Blank	Blank

Area Name	Role Name	View	New	Update	Delete/Close (delete)	Modify Template	Expert	Admin	Allowed Statuses	Allowed Categories
Change Tasks Incident Tasks	Requestor	True	False	Never	Never	False	False	False	Blank	Blank
	Request Approver	True	False	Never	Never	False	False	False	Blank	Blank
	Request Coordinator	True	False	Never	Never	False	False	False	Blank	Blank
	Request Analyst	True	False	Never	Never	False	False	False	Blank	Blank
	Request Manager	True	False	Never	Never	False	False	False	Blank	Blank
	Request Process Owner	True	False	Never	Never	False	False	False	Blank	Blank
	Stock Manager	False	False	Never	Never	False	False	False	Blank	Blank
Service Desk	Requestor	True	False	Never	Never	False	False	False	Blank	Blank
	Request Approver	True	False	Never	Never	False	False	False	Blank	Blank
	Request Coordinator	True	False	Never	Never	False	False	False	Blank	Blank
	Request Analyst	True	False	Never	Never	False	False	False	Blank	Blank
	Request Manager	True	False	Never	Never	False	False	False	Blank	Blank
	Request Process Owner	True	False	Never	Never	False	False	False	Blank	Blank
	Stock Manager	False	False	Never	Never	False	False	False	Blank	Blank

Area Name	Role Name	View	New	Update	Delete/Close (delete)	Modify Template	Expert	Admin	Allowed Statuses	Allowed Categories
Tailoring	Requestor	False	False	Never	Never	False	False	False	N/A	N/A
	Request Approver	False	False	Never	Never	False	False	False	N/A	N/A
	Request Coordinator	False	False	Never	Never	False	False	False	N/A	N/A
	Request Analyst	False	False	Never	Never	False	False	False	N/A	N/A
	Request Manager	True	True	Always	Always	False	False	False	N/A	N/A
	Request Process Owner	True	True	Always	Always	False	False	False	N/A	N/A
	Stock Manager	False	False	Never	Never	False	False	False	N/A	N/A

Out-of-box role rights in the Common Configuration area

The Common Configuration area is used to set the permissions that control access to common configurations, including Alert Definitions, Approval Definitions, Assignment Groups, Service Desk/Problem Solution Matching, and Environment.

Based on the mapping rules, the rights and settings in previous security profiles are mapped to the rights and settings in the Common Configuration area specified in the corresponding security roles. See the table below for the out-of-box security rights in the Common Configuration area. This table only lists the new security roles that have different settings with the default rights.

Area	Role	View	New	Update	Delete/Close	Modify Template	Expert	Admin
Common Configuration	change analyst change	True	True	Always	Always	False	False	False
	change analyst tasks	True	True	Always	Always	False	False	False
	change approver	True	True	Always	Always	False	False	False
	change coordinator change	True	True	Always	Always	False	False	False
	change coordinator tasks	True	True	Always	Always	False	False	False
	change manager	True	True	Always	Always	False	False	False
	configuration auditor	True	True	Always	Always	False	False	False
	emergency group	True	True	Always	Always	False	False	False
	incident analyst	True	True	Always	Always	False	False	False
	incident coordinator	True	True	Always	Always	False	False	False
	incident manager	True	True	Always	Always	False	False	False
	initiator	True	True	Always	Always	False	False	False

Area	Role	View	New	Update	Delete/Close	Modify Template	Expert	Admin
	operator	True	True	Always	Always	False	False	False
	problem analyst	True	True	Always	Always	False	False	False
	problem coordinator	True	True	Always	Always	False	False	False
	problem manager	True	True	Always	Always	False	False	False
	reviewer	True	True	Always	Always	False	False	False
	SD agent/manager	True	True	Always	Always	False	False	False
	service desk agent	True	True	Always	Always	False	False	False
	service desk manager	True	True	Always	Always	False	False	False
	system administrator	True	True	Always	Always	True	True	True
	Requestor	True	False	Never	Never	False	False	False
	Request Approver	False	False	Never	Never	False	False	False
	Request Coordinator	True	False	Never	Never	False	False	False
	Request Analyst	False	False	Never	Never	False	False	False
	Request Manager	True	True	Always	Always	False	False	False
	Request Process Owner	True	True	Always	Always	False	False	False
	Stock Manager	False	False	Never	Never	False	False	False

Security folder and mandanten

The following tables in Request Fulfillment module support security folder and mandanten mechanism in the out-of-box system.

- request
- requestTask
- rmCategory
- rmTaskCat
- requestModel
- productCatalog
- prodCatalogCategory

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