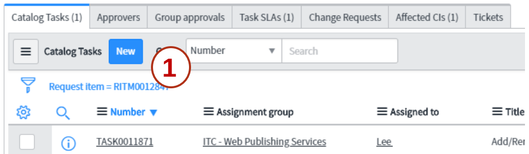
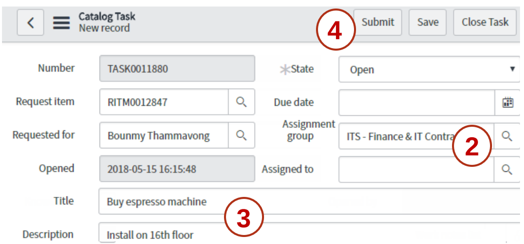
6. Create a catalog task



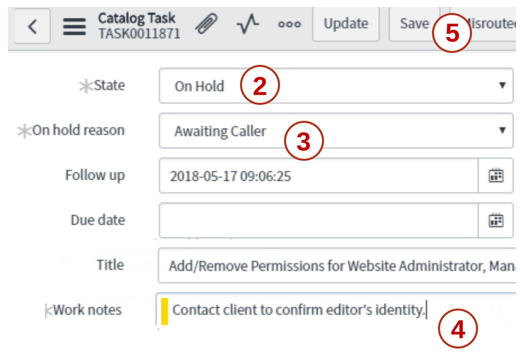


Catalog tasks are created when you need another team to help you while you continue to work on the request item.

1. Go to the request item, click the **New** button under the **Catalog Tasks** tab.
2. Set the **Assignment group**, but leave **Assigned to** empty; the assignment group will assign it to an individual.
3. Enter a **Title**, **Description** of the task.
4. **Submit**.

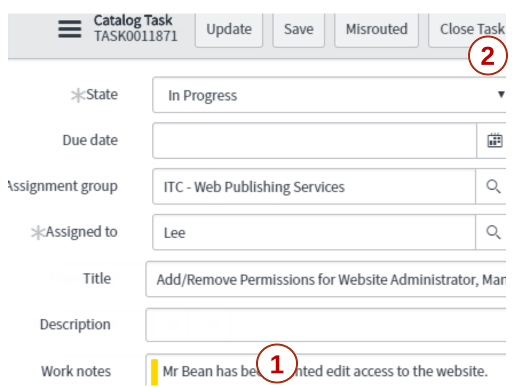
The assignment group will be notified of the task by email.

5. Place request on hold



1. Go to the catalog task.
2. Click on the **On Hold** button.
3. Select the **On hold reason**.
   If awaiting caller, set **Follow up** date.
4. Enter details in the **Work notes**.
5. **Save**.

7. Close the catalog task



Go to the request item and use the **Additional comments** to inform the customer the request has been fulfilled before closing the catalog task.

The request item will be closed automatically once all its catalog tasks are closed.

1. Enter details in the **Work notes**.
2. Click **Close Task.**

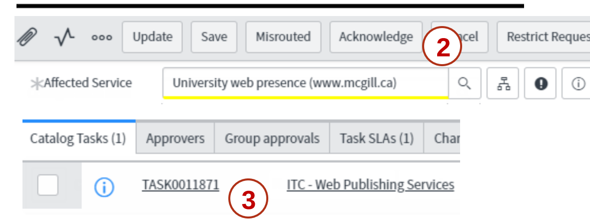
ITSM
Request Fulfillment

Request workflow

Request fulfillment provides a channel for users to request and receive standard services. Here are the steps you should take to fulfill a request assigned to your team.

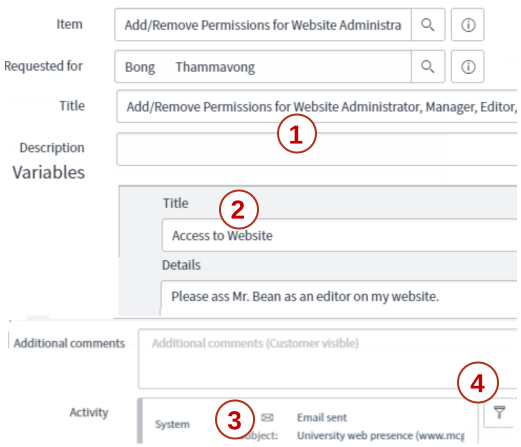
1. Acknowledge
2. Review and update the information that has been logged.
   a) Title, Description, Details, Activity log
   b) Customer profile and history
   c) Configuration item, Affected Service
3. Begin work on the catalog task
4. Communicate with the caller and affected user.
5. If you need help with the request, create a catalog task.
6. Place the request on hold, if necessary.
7. Contact the customer, close the task.

1. Acknowledge



1. Go to **My Groups Work** to navigate to a request item assigned to your group (its number will begin with “RITM”).
2. Click **Acknowledge** when you are ready to begin work.
3. This will create a catalog task which can be seen under the **Catalog Tasks** list at the bottom of the request item.

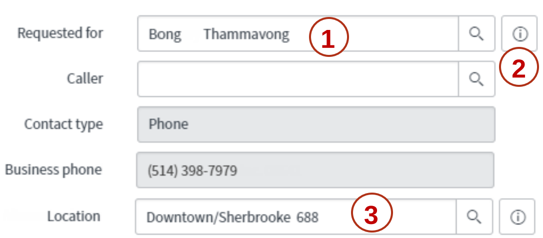
2. a) Title, Activity



Review the information on the request item.

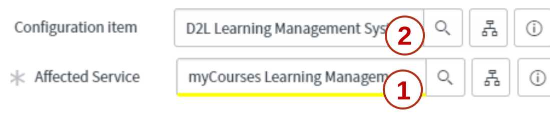
1. **Title, Description** (from catalog)
2. **Variables** are information submitted by the customer.
3. The **Activity** log, under the **Notes** tab, displays a running account of **Work notes**.
4. Use the filter to select what activity you want to see in the log.

2. b) Customer profile



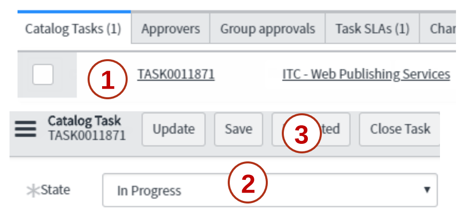
1. **Requested for**: shows name of the customer.
2. **Information icon**: hover over for client's title, department.
   Click to see profile, call history.
3. **Location**: filled in based on client's profile, but can be changed.

2. c) CI, Affected Service



1. **Configuration item** is optional.
   - If CI is selected, Affected service will be automatically entered.
   - Use the wildcard * when entering the name: e.g. *mail
   - Click "Look up" icon for other filters.
   - Additional **Affected CIs** may be listed at the bottom of the page.
2. **Affected Service** is filled in based on the item being requested, but can be changed. Enter the business service (application service if no business service exists, technology service if no application service exists).

3. Work on catalog task

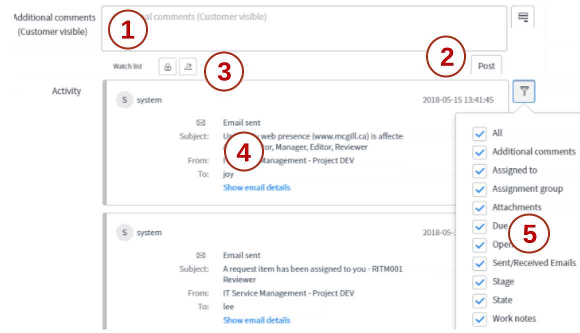


Your work should be done and recorded on the catalog task.
The catalog task will **not** appear before you have acknowledged the request item.

1. Click the catalog task found under **Catalog Tasks** at the bottom of the request item.

Use **Work notes** on the catalog task to document all fulfillment steps.

4. Communicate



Use the request item (not the catalog task) to communicate with the customer.

1. Use **Additional comments** to communicate with the customer. Messages entered will be immediately emailed to them.
2. Click **Post** to email the comments to client.
3. People added to the **Watch list** will receive posts made to the client in the **Additional comments** field.
4. The **Activity** log displays a running account of comments to, and emails received from, the customer.
5. Use the filter to select what activity you want to see in the log. The log can be very long, so you may want to select the most essential fields: Additional comments and Emails.