

6. Create a catalog task

The screenshot shows the 'Catalog Tasks' tab with a 'New' button circled in red (1). Below it, the 'Request Item' is 'RITM0012847'. The 'Assignment group' is 'ITS - Finance & IT Contr' circled in red (2). The 'Title' is 'Buy espresso machine' circled in red (3). The 'Description' is 'Install on 16th floor' circled in red (3). The 'Submit' button is circled in red (4).

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

The screenshot shows the 'Catalog Task' form for 'TASK0011871'. The 'State' is 'On Hold' circled in red (2). The 'On hold reason' is 'Awaiting Caller' circled in red (3). The 'Follow up' date is '2018-05-17 09:06:25'. The 'Title' is 'Add/Remove Permissions for Website Administrator, Man'. The 'Work notes' field contains 'Contact client to confirm editor's identity.' circled in red (4). The 'Save' button is circled in red (5).

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

The screenshot shows the 'Catalog Task' form for 'TASK0011871'. The 'State' is 'In Progress' circled in red (2). The 'Assignment group' is 'ITC - Web Publishing Services'. The 'Assigned to' is 'Lee'. The 'Title' is 'Add/Remove Permissions for Website Administrator, Mar'. The 'Description' is empty. The 'Work notes' field contains 'Mr Bean has been granted edit access to the website.' circled in red (1). The 'Close Task' button is circled in red (2).

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**.



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

1. Acknowledge

The screenshot shows the 'Catalog Task' form for 'TASK0011871'. The 'Affected Service' is 'University web presence (www.mcgill.ca)'. The 'Acknowledge' button is circled in red (2). The 'Catalog Tasks' list at the bottom shows 'TASK0011871' circled in red (3) under the 'ITC - Web Publishing Services' group.

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

The screenshot shows a request item form. Callout 1 points to the Title field containing 'Add/Remove Permissions for Website Administrator, Manager, Editor, ...'. Callout 2 points to the Variables section, which includes a Title field with 'Access to Website' and a Details field with 'Please ass Mr. Bean as an editor on my website.'. Callout 3 points to the Activity log, which shows a system message: 'System Email sent Subject: University web presence (www.mcgill.ca)'. Callout 4 points to the Additional comments field, which contains 'Additional comments (Customer visible)'.

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

The screenshot shows a customer profile form. Callout 1 points to the Requested for field containing 'Bong Thammavong'. Callout 2 points to the Information icon (i) next to the Caller field. Callout 3 points to the Location field containing 'Downtown/Sherbrooke 688'.

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

The screenshot shows configuration item and affected service fields. Callout 1 points to the Affected Service field containing 'myCourses Learning Management System'. Callout 2 points to the Configuration item field containing 'D2L Learning Management System'.

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

The screenshot shows a catalog task interface. Callout 1 points to the task ID 'TASK0011871'. Callout 2 points to the State dropdown menu, which is currently set to 'In Progress'. Callout 3 points to the 'Update' button.

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

The screenshot shows a communication interface. Callout 1 points to the Additional comments field. Callout 2 points to the Post button. Callout 3 points to the Watch list field. Callout 4 points to an email message in the Activity log with subject 'University web presence (www.mcgill.ca) is affected by: Manager, Editor, Reviewer'. Callout 5 points to the filter dropdown menu on the right side of the Activity log.

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.