

Yale University Request Management Process Guide



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(888) 440-2730 x702
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Introduction

Purpose

This document will serve as the official process of Request Management for Yale University. This document will introduce a Process Framework and will document the workflow, roles, procedures, and policies needed to implement a high quality process and ensure that the processes are effective in supporting the business. This document is a living document and should be analyzed and assessed on a regular basis.

Scope

The scope of this document is to define the Request Management Process, and process inputs from, and outputs to, other process areas. It should be noted that within ServiceNow, request management is enabled through the Service Catalog module, and request processing is often associated with that term.

Other service management areas are detailed in separate documentation. The following is a specific list of items that are in scope for this document. Other items not listed here are considered out of scope for this document.

In scope:

- Request Management Overview
 - Request Definition
 - Request Management Objectives
 - Request Management Policies
- Request Management Process Flow
- Request Management Roles
- Request Management RACI
- Request Management Process Procedure
- Request Management Prioritization scheme
- Request Model Type
- Request Management Process Metrics

Request Management Overview

Request Management Definition

- A mechanism to handle requests made to IT
- Defines request policies and fulfillment procedures
- Provides end to end request processes
- Typically represents a significant amount of Service Desk work
- Typically small changes (low risk, frequently occurring, low cost, (such as password reset, request for software installation, etc.) handled through request fulfillment rather than congesting the Change Process
- Not one process, but a set of workflows to fulfill requests

Request Management Objectives

- Provide rapid and efficient procurement of items and access to services
- Clearly defines what services and items are available, what they cost, and how long they take

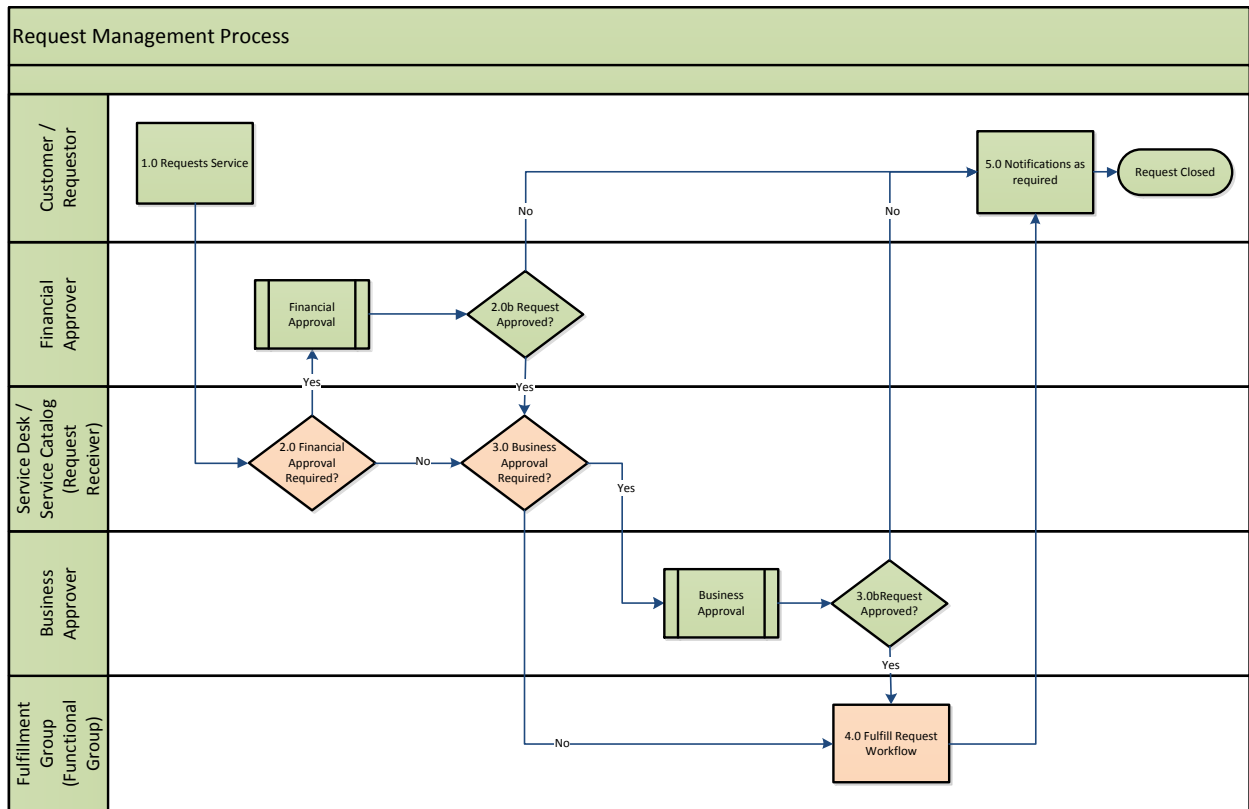
Request Management Policies

All requests will be owned by the Service (Order) Desk

Request fulfillment objectives will be defined and communicated for each request

Request Management performance will be reviewed annually and policies / fulfillment objectives may be updated.

Request Management Process Flow



Roles

The following roles have been identified within the Request Management Process.

Role	Description
Request Management Process Owner	<ul style="list-style-type: none"> Owns the process end-to-end, including the RACI, process & procedural steps, roles & definitions Accountable for maturing and evolving the process, based on monthly/quarterly/yearly review of process KPIs Adjusts the process to address performance or changing business needs
Request Manager	<ul style="list-style-type: none"> Oversee day to day process execution Owns the request-specific workflow definitions Often the Service Desk Manager or a Service Order Desk Manager
Service (Order) Desk Manager / Lead	<ul style="list-style-type: none"> Manages the Service (Order) Desk function, including staffing management activities Provides guidance to Service (Order) Desk Analysts
Customer / Requestor	<ul style="list-style-type: none"> The individual who is submitting the request
Service (Order) Desk Analyst	<ul style="list-style-type: none"> The group responsible for receiving the request and ensuring it follows the proper request workflow and approval The group responsible for communicating with the Customer/Requestor if the request is denied or once it has been fulfilled Some or all of these activities may be fully automated through the Service Catalog
Financial Approver	<ul style="list-style-type: none"> The individual or role who must confirm that the request should be fulfilled from a financial perspective
Business Approver	<ul style="list-style-type: none"> The individual or role who must agree that the request should be fulfilled from a business perspective
Fulfillment Group (Queue Mgr / Analyst)	<ul style="list-style-type: none"> Group of support analysts who handle fulfilling the requests and have both the knowledge and the authorization to do so. Queue Manager(s) assign tasks to resources, and oversee those fulfillment activities.

RACI

	Requester / Customer	Service Desk Analyst / Service Catalog	Service (Order) Desk Lead	Request Manager	Financial / Business Approver	Fulfillment Group – Queue Manager	Fulfillment Group – Tier 2+ Analyst	Request Mgt Process Owner
1.0 Request Logging	C	R	R	A				
2.0 Financial Approval Required?	C	R*			A**			
2.0b Financial Approval Received?	I	R*			A**			
3.0 Business Approval Required?	I	R*			A**			
3.0b Business Approval Received		R*			A**			
4.0 Fulfillment Workflow		R*				A	R	
5.0 Notifies Requestor	I	R		A			R	
Process Maturity and Evolution	C, I	C	R	R	C	R	C	A

* Intent is for approvals and request item workflow to be automated.

** Each request item may have its own pre-defined and unique approval policies.

Process Procedures

Step	Activities
1.0 Request Logging	The customer requests a service via Service Desk or through the Service Catalog. The details for each request item are captured.
2.0 Financial Approval Required?	The request is assessed to determine if a specific financial approval is required and forwards to the right individual or group for approval. The financial approval may vary by customer group/org, service, location, product or a combination of the above. Thus, there may be more than 1 financial approval model.
2.0b Financial Approval Received?	If financial approval is awarded, the approver confirms approval and the request is processed by a coordinator or automated for further action.
3.0 Business Approval Required?	The request is assessed to determine if a specific business approval is required and forward to the right individual for approval.
3.0b Business Approval Received	If business approval is awarded, the approver confirms approval and the request is routed to the Fulfillment Group (Functional Groups)
4.0 Fulfillment Workflow	The Fulfillment Group(s) complete tasks to fulfill the request items. The queue manager(s) assign tasks to specific resources on the team. Once all fulfillment items are complete, the request is routed to the Service Desk for confirmation of fulfillment with the customer.
5.0 Notifies Requestor	The Service Desk notifies the Requestor as required throughout the process. If the request is denied at any stage or upon completion of the request, the Service Desk notifies the Requestor.

Prioritization scheme

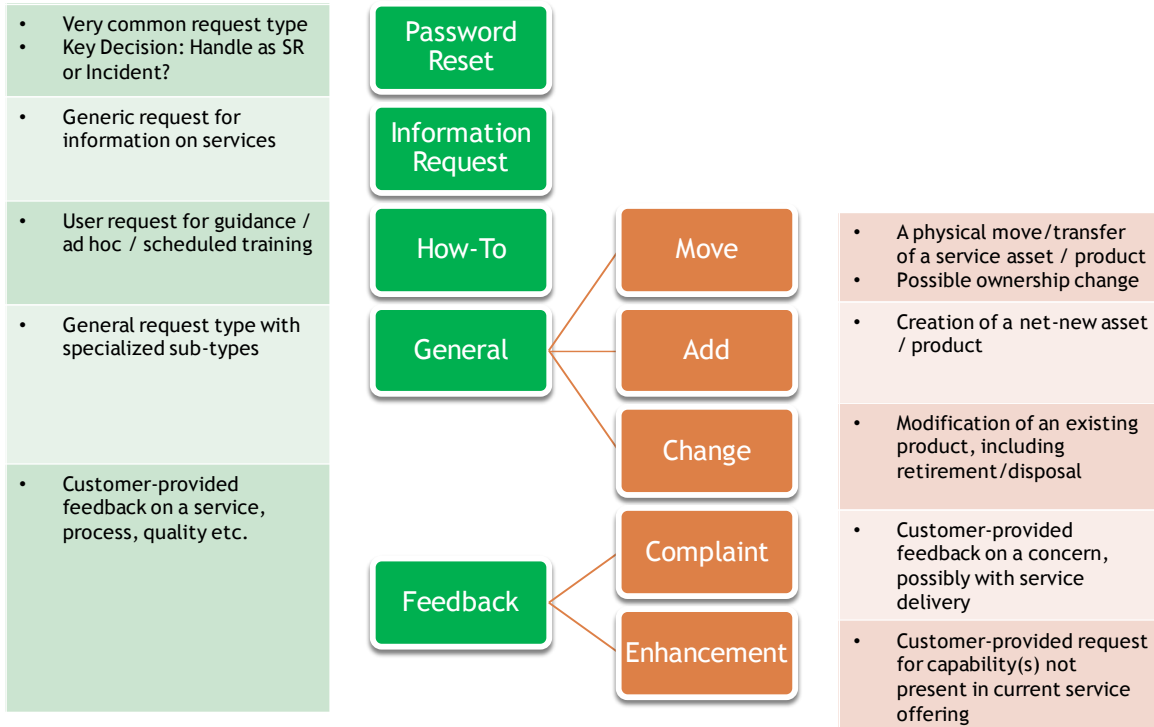
Like Incidents, Service Requests are also based on a combination of Impact and Urgency, however, since Service Requests are generally planned and do not require the same prioritization.

The follow table shows the resulting priority based on impact and urgency for Service Request.



Request Type Model

Requests are categorized within this request type model. This model ensures that all requests can be normalized into a standard format for coordination and reporting purposes.



Process Metrics

The following table describes the Request Management KPIs identified.

Yale KPI #	KPI Name	OM DESCRIPTION
2.1	First Call request (Resolution) Fulfillment	How many requests were fulfilled without assignment to fulfillment group(s)?
8	% Requests reopened	How many requests were incompletely fulfilled, requiring service desk interaction to address.
9	% Ageing requests	How many requests are unfulfilled past threshold
11	% Requests (resolved) fulfilled on time	How many requests are fulfilled on time ** From Approval or From Requested?

Document History

Version	Date	Changes	Author
01	12/31/2011	Initial Document	Angie Massicotte / Michael Oas
02	01/02/2012	Minor Updates	Michael Oas