

Request Fulfillment Process, Use Case & Data

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Created by:	Business & Data Layer Tiger Teams
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Purpose

The purpose of this document is to communicate the findings of the Business & Data Layer Tiger Teams as it relates Package A to the GC ITSM WG.

The purpose of the Business and Data Layer Tiger teams is to provide specific deliverables related to interdepartmental business-level processes and data that is required to transit between departments to support those processes.

Terminology

Data Statements

Steps often require the transfer, recording, or modification of data, referred to here as the “Data Statement”. Any step written in a fashion that would require multiple Data Statements depending upon some criteria, should be decomposed into sub-steps so that only one Data Statement per step is required.

Data Statement Syntax

Data Statements are in bullet form with formatting consistent with the following:

- Normal Text – Indicates that the data is not mandatory and is freeform with no expected convention
- Normal Text* – Indicates that the data is mandatory and must be provided to complete the current step or move to the next step
- *Italics* – Indicates that the data is very likely to be system-generated
- (Round Bracketed Text) – Indicates that the data is expected to conform to a known and documented convention, such as the naming of a server or a room or a person’s name, such as “Last, First”
- [Square Bracketed Text] – Indicates that the data is expected to conform to a known list of values, such as a listed and ranked Priority

The syntax can be combined in any way, however, Normal* and Normal are considered mutually exclusive, as are Round and Square brackets. For example:

- [Urgency*] – Mandatory data that must also conform to a known list of values
- Submission Date* – A mandatory value that is very likely automatically generated

Triggers

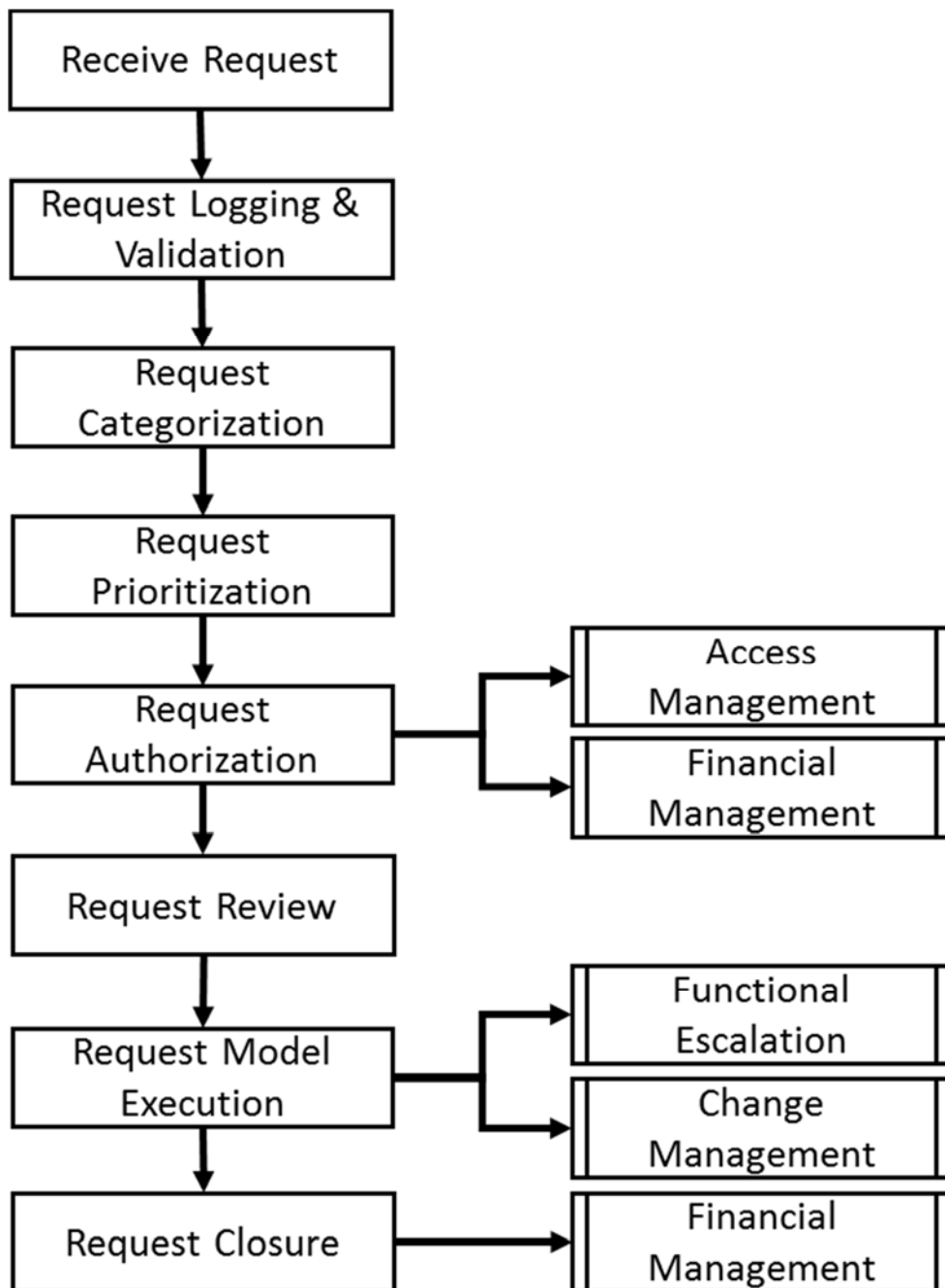
Request fulfillment is triggered when an authorized service request appears in the queue of the appropriate service provider. A service request (SR) will have one or more associated tasks, any one of which could involve additional service providers (SP) within the Dept A or SSC.

Approved SR are routed to SSC, but ownership of the request remains with Department A who will act as the single point of contact with the client (end user).

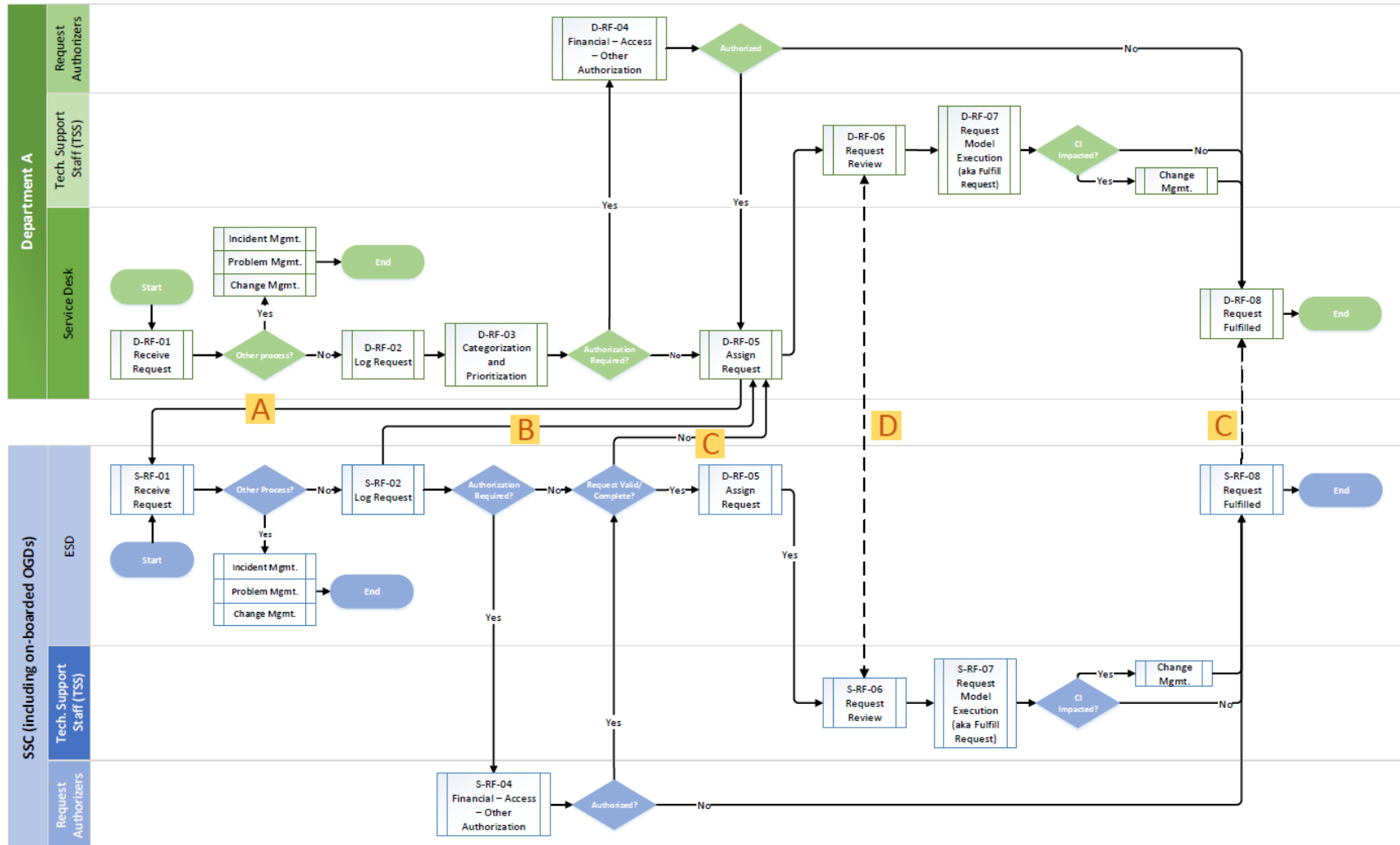
Request Fulfillment Data Elements

A	B	C	D
<ul style="list-style-type: none"> · [End User Department]* · (End User) · (End User Email) · (End User Phone) · [Affected Service]* · [Category - Request Fulfillment]* · [Sub-Category]* · [Sub-Sub-Category]* · Short Description* · Detailed Description · [Location]* · [Impact]* · [Urgency]* · [Priority]* · [Process Status]* · Work Log Entry* · [Contact Department]* · (Contact Name)* · (Contact Email)* · (Contact Phone)* · Dept ITSM Service Request ID* 	<ul style="list-style-type: none"> · SSC ITSM Service Request ID* · Dept ITSM Service Request ID* · [Process Status]* · Work Log Entry* 	<ul style="list-style-type: none"> · SSC ITSM Service Request ID* · Dept ITSM Service Request ID* · [Process Status]* · Work Log Entry* · [Closure Code]* 	<ul style="list-style-type: none"> · SSC ITSM Service Request ID* · Dept ITSM Service Request ID* · [Process Status]* · Work Log Entry* · (Estimated Fulfillment)*

High-level Request Fulfillment Process Diagram



Request Fulfillment Process Flow Diagram



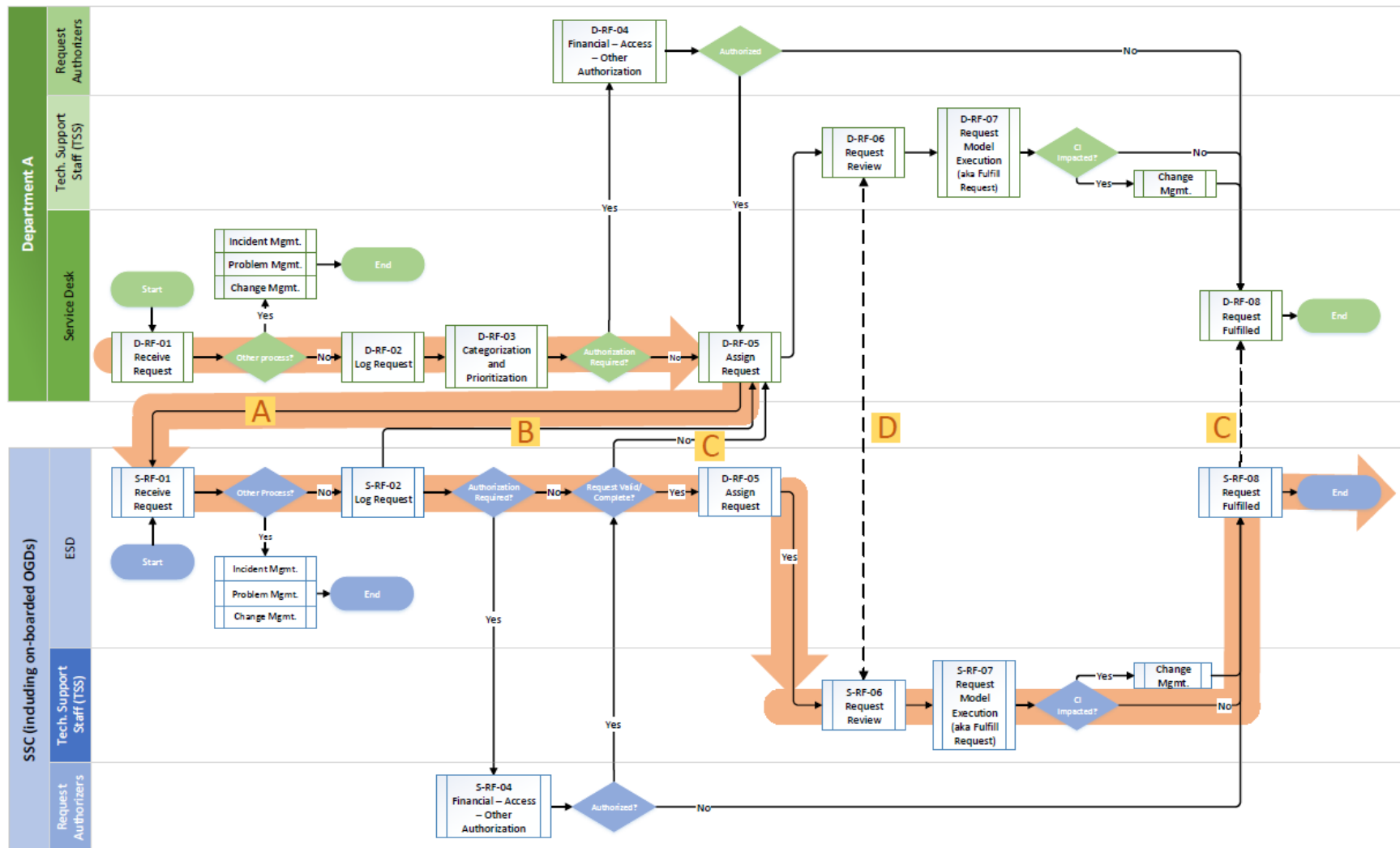
Note: This diagram is based on the Request Fulfillment Process Flow diagram - Source ITIL Service Operation, 2011 edition

Request Fulfillment Generic Use Case

Description	A request from a User for information or advice, or for a Standard Change or for Access to an IT Service	
Primary Actor	Department A <ul style="list-style-type: none"> - Service Desk Agent/Primary Analyst 	
Secondary Actors	Department A <ul style="list-style-type: none"> - Service Request Manager - Technical Support Staff - Request Authorizer - End User 	SSC acting as the National Service Provider (NSP) <ul style="list-style-type: none"> - Enterprise Service Desk - Service Request Manager - Technical Support Staff - Request Authorizer - End User
Successful end condition	Service implemented or restored to user in time frame allowed by SLA	
Failure end condition	Service not implemented or restored to user in time frame allowed by SLA	
Trigger	Service Request <ul style="list-style-type: none"> - reported by user or SSC - reported by a Service Desk 	<ul style="list-style-type: none"> - reported by a service provider Service Request received by <ul style="list-style-type: none"> - Telephone call, Service Portal, email or walk-up
Outputs	Problem Management Change Management Service Catalogue Management Access Management Financial Management IT Security Management	Business Requirements Management Asset Management Configuration Management Knowledge Management Continual Service Improvement
Assumptions	<ul style="list-style-type: none"> • Users (non-IT staff) in Department A consume SSC services both directly (e.g. email and videoconferencing) and indirectly (infrastructure services supporting Department A solutions). • This use case only applies to services provided by SSC and consumed by users of Department A. Thus, certain situations are out of scope: (1) the provision of IT services by Department A to users from a third department and (2) the consumption of IT services supplied by a vendor or another Government entity. • Department A and SSC each have their own ITSM Solutions (and there are some automated linkages possible between these 	

	<p>tools) and their own Service Desks or access to a service desk.</p> <ul style="list-style-type: none">• Only the Department A Service Desk will be able to request small changes or report service requests to SSC.• The service desk will be responsible for initiating and handling the request, even if that request is initiated through a portal.• This use case does not describe the interaction in Department A and the users of its IT services prior to the service request being reported to SSC.• This use case applies to all requests (simple) that fall within the Service Catalogue. More 'complex' requests fall under Service Portfolio Management.• All 'Affected Services' are found in the Service Catalogue.• Some requests may require additional data elements to be transferred between Department A and SSC.
References	ITIL V3 Service Operation


Process Flow Diagram



Activities

ID	Activity	Actor	Task	Interaction	Data Statement
START	Enters Service Request		Process starts with either START a or START b	Department A (D)	
START a D-RF-01	Enters Service Request	End User (via portal)	End User makes a Service Request via the portal	D	
START b D-RF-01	Enters Service Request	Department A Service Desk	Dept A Service Desk makes a Service Request via the portal on End Users behalf.	D	
D-RF-02	Log Request	Department A Service Desk	Service Request logged and validated. If not valid return to End User.	D	
D-RF-03	Request Categorization	Department A Service Desk OR End User (via portal)	Categorize Service Request	D	
D-RF-03	Request Prioritization	Department A Service Desk OR End User (via portal)	Prioritize Service Request – urgency & impact	D	
D-RF-04	Request Authorization	Department A Service Desk	Service Request is authorized: Access Management Financial Management Other authorizations If not authorized the request is closed with the appropriate	D	

ID	Activity	Actor	Task	Interaction	Data Statement
			closure code		
D-RF-05	Assign Request	Department A Service Desk	The request is assigned. If it needs to be assigned to SSC the request is routed to the SSC Enterprise Service Desk	D	
S-RF-01	Receive Request	Department A Service Desk	Report service request to SSC Enterprise Service Desk (by phone, email, or through automated linkages between tools) Ensure that this is a Service Request	D >> SSC	A
S-RF-02	Log Request	Enterprise Service Desk	Service Request logged and verified. If the information in one or more fields is not valid or incomplete, return to Department A Service Desk. Communicate the estimated time to implement the request to Department A Service Desk.	SSC >> D	B
S-RF-04	Request Authorization	Request Authorizers	Request must be eligible in terms of Access Management and Financial Management	SSC	
D-RF-05	Return to Requestor (End User)	Enterprise Service Desk	Request is returned to Department A by the Enterprise Service Desk for clarification or additional information.	SCC >> D	C
S-RF-05	Assign Request	Enterprise Service Desk	The Request is assigned.	SSC	
S-RF-06	Request Review	Technical Support Staff	Document actions performed to implement the change, including escalations to third parties.	SSC	
S-RF-06	Request Review	SSC Technical Support Staff	Issue notice(s) to all stakeholders as necessary, so users are able to adjust expectations.	SSC >> D	D

ID	Activity	Actor	Task	Interaction	Data Statement
			Additional notifications will be issued as required until the request is fulfilled.		
S-RF-07	Request Model Execution	SSC Technical Support Staff	<p>Fulfill request</p> <p>If there are any CIs, perform Change Management.</p> <p>Note: For a CI, there will be interdepartmental interaction in this process to complete the change.</p>	SSC	
S-RF-08	Request Closure	Enterprise Service Desk	<p>Provide final quality control to request record before it is closed. Ensure that the record is fully documented. Ensure any subsequent processes are supported</p> <p>Carry out user satisfaction survey</p> <p>Validate information on Service Request record and generate post-Service Request report</p> <p>If any costs were incurred notify Financial Management</p> <p>Formally close the request record</p>	SSC >> D	

Request Fulfillment - Blackberry Request Use Case



Process Flow Diagram


Same as for Generic Use Case


Activities

ID	Activity	Actor	Task	Interaction	Data Statement
START a D-RF-01	Enters Service Request	TC End User (via portal)	<p>Amy Anker requires a new blackberry and makes a Service Request via the portal.</p> <p>Through the portal Amy categorizes and prioritises her request.</p> <p>She also completes the most up-to-date online SSC GCS Request form with the following information:</p> <p>A.SERVICE REQUESTED AND TYPE</p> <p>Service Requested: BB 10 Device Request Type: New Request Device Requested (if applicable) Approval Level: DG or equivalent Justification / Additional Information</p> <p>B.CLIENT INFORMATION</p> <p>Client FirstName Client LastName Work Email Address Work Email User ID Office Phone (If applicable) Address 1 Address 2 Workstation /Mailstop City Province Postal Code Service in English ou service en français?</p>	Transport Canada (TC)	

ID	Activity	Actor	Task	Interaction	Data Statement
			<p>Additional Organization Information (Field 1) Additional Organization Information (Field 2)</p> <p>C.CURRENT MOBILE CELLULAR DEVICE INFORMATION (if applicable) Current Supplier (If Known) Primary City of Use Current Mobile Telephone# Device IMEI#</p> <p>D.DELIVERY ADDRESS FOR MOBILE DEVICE (if different from client address) First name Last name Office telephone # (if applicable) Cell telephone # (if applicable) Address 1 Address 2 Workstation /Mailstop City Province Postal Code</p> <p>E.ALTERNATE CONTACT (Mandatory) First name Last name Office telephone # (if applicable) Cell telephone # (if applicable)</p> <p>F.DEPARTMENTAL APPROVAL FOR OPERATING STANDARD FOR PROVISION OF TELECOMMUNICATION DEVICES First name Last name Title Email I accept</p>		

ID	Activity	Actor	Task	Interaction	Data Statement
D-RF-02	Log Request	TC Service Desk	Gerry Grumble (TC Service Desk) logs and validates the Service Request. All seems OK.	TC	
D-RF-04	Request Authorization	TC Service Desk	Gerry Grumble confirms that Amy has been authorized to receive a new Blackberry device: <ul style="list-style-type: none"> • Access Management - approved • Financial Management - approved • Other authorizations - approved • Must be pre-approved and documented in SSC GCS Form. • Possibly email attachment to service request? 	TC	
D-RF-05	Assign Request	TC Service Desk	Gerry Grumble assigns the Service Request to the SSC Service Desk. <ul style="list-style-type: none"> • Gerry also sends the SSC's GCS Request form that was completed and signed by Amy Anker - to the SSC Service Desk. • Completed SSC GCS Form • DG approval or equivalent by email (attach to ticket) 	TC	
S-RF-01	Receive Request	SSC Service Desk	Alex Armstrong (SSC Service Desk) receives the Service Request from Gerry Grumble. He confirms that it is a New Service Request.	TC >> SSC	 <ul style="list-style-type: none"> • Blackberry specific Data elements (D-RF-01)
S-RF-02	Receive and Review	SSC Service Desk	Alex Armstrong logs and verifies the Service Request. Alex notifies Gerry Grumble that the Service Request has been logged and communicates the estimated time to implement the request.	SSC >> TC	
S-RF-04	Request	SSC	Alex determines that the Service Request is eligible in terms of Access	SSC	

ID	Activity	Actor	Task	Interaction	Data Statement
	Authorization	Request Authorizers	Management and Financial Management <ul style="list-style-type: none"> Completed in Step D-RF-01 and confirmed by Dept A Service Desk in Step D-RF-05. 		
S-RF-05	Assign Request	SSC Service Desk	Alex assigns the request to the SSC Voice Services team. <ul style="list-style-type: none"> Update Assigned Dept to SSC Voice Services team. 	SSC	
S-RF-06	Request Review	SSC Technical Support Staff	The to SSC Voice Services team document actions performed to implement the Service Request. The SSC Voice Services team can't provide the exact Blackberry device requested by Amy. <ul style="list-style-type: none"> Update Service Request to Status: Pending Customer 	SSC	
S-RF-06	Request Review	SSC Technical Support Staff – Dept A Service Desk	The SSC Voice Services team updates Service Request that the device that User requested is no longer available. Dept A Service Desk contacts User, Amy, to identify alternate model of Blackberry to be purchased. Dept A Service Desk updates Service Request with updated device requested information.	SSC >> TC	
S-RF-07	Request Model Execution	SSC Technical Support Staff – Dept A End user	SSC Voice Services Team fulfill the Service Request (adjusted request). SSC Voice Services Team orders the device and has it shipped to Amy Ankers' mailing address directly . The Vendor notifies the SSC Voice Services team that the blackberry has been shipped. <ul style="list-style-type: none"> SSC Voice Services Team is responsible for creating the BES account by using the information on the GCS form. SSC Voice Services Team sends the activation instructions to the Dept A employee and cc's the approver. Client calls 1-844-712-8444 to activate their Blackberry. Dept A Service Desk is notified of completion of the request 	SSC	

ID	Activity	Actor	Task	Interaction	Data Statement
			<p>when the client is notified their device is shipping.</p> <ul style="list-style-type: none"> - SSC Voice Services Team ensures that the client's phone is activated and coordinates return of old device if required. - If the device is not received by the client Dept A Service Desk submits ECD form "Blackberry 10 issue" on the SSC ECD Portal and create an Dept A incident ticket to track the request. <p>If there are any CIs, perform Change Management. Note: For a CI, there will be interdepartmental interaction in this process to complete the change.</p>		
S-RF-08	Request Closure	SSC Service Desk	<p>Alex provides final quality control to the Service Request record before it is closed. He ensures that the Service Request record is fully documented and any subsequent processes are supported.</p> <p>Alex notifies Gerry Grumble (TC) that the Service Request has been closed and that the Blackberry has been delivered.</p> <p>Alex sends out a user satisfaction survey to Amy Ankers TC</p> <p>Alex validates information on Service Request record and generate post-Service Request report</p> <p>If any costs were incurred notify Financial Management</p> <p>Formally close the request record</p>	SSC >> TC	

Request Fulfillment Data Definitions

Data set	GC Label	GC Description	Mandatory	Keyed Text	Drop-Down	System-Gen	Convention
A	Affected Service	List of SSC technical service(s) that have been affected by the request	X		X		
A	Category - Request Fulfillment	SSC category assigned to the service request Business Technical	X		X		
A	Sub-Category	Second level of categorization	X		X		
A	Sub-Sub-Category	Third level of categorization	X		X		
C	Closure Code	The code assigned when a request is closed	X		X		
A	Contact Department	Department that initiated the service request – often on behalf of the end user	X		X		
A	Contact Email	Email address of a contact other than the end user, who initiated the request	X	X			X
A	Contact Name	Name of the contact, other than the end user, who initiated the service request	X	X			X
A	Contact Phone	Primary phone number of the contact, other than the end user, who initiated the request	X	X			X
A,B,C,D	Department ITSM SR ID	Unique identifier for a Department ITSM SR	X			X	
A	Detailed	Long description of the request		X			

Data set	GC Label	GC Description	Mandatory	Keyed Text	Drop-Down	System-Gen	Convention
	Description						
A	[End User Department]*	Department or Agency that is responsible for submitting the service request.	X		X		
A	End User	The first and last name of the individual who has submitted the service request		X			X
A	End User Email	The End User's Email address		X			X
A	End User Phone	The End User's Phone number		X			X
D	Estimated Fulfillment	Estimated time to receive the service	X	X			X
A	Urgency	An indication of the time before the business is severely impacted	X		X		
A	Impact	Describes the business impact resulting from the request	X		X		
A	Priority	Each priority has a calculated numeric value (impact and urgency) associated (1 to 4) in the database.	X		X		
A	Location	Physical location for service delivery - may change throughout the process	X		X		
A,B,C,D	Process Status	Identifies the stage of the request fulfillment lifecycle	X		X		
A	Short Description	Brief description of the service request	X	X			

Data set	GC Label	GC Description	Mandatory	Keyed Text	Drop-Down	System-Gen	Convention
B,C,D	SSC ITSM SR ID	Unique identifier for an SSC ITSM SR	X			X	
A,B,C,D	Work Log Entry	Running log of actions captured during the request fulfillment process	X	X			