IT service request fulfilment

Process Definition Document (PDD): template and worked example

Example company (fictional): Kestrel Valley Freight Ltd, a regional freight forwarder in Leeds, England (410 employees).

Document control

Field	Value
Process name	IT service request fulfilment
Process owner	[Name, role]
Prepared by	[Name]
Reviewed by	[Names of the people who do the work]
Approved by	[Name, date]
Version	1.0 (as-is)
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How to use this template

This is a complete process definition document (PDD) for IT service request fulfilment, also called service request management or catalogue request handling. It covers the routine, repeatable asks that people make of IT: a new laptop, a licence for a design tool, access to a shared mailbox, a second monitor. It does not cover things that are broken or things that change the shared environment. The company is fictional, but the flow is the one most IT teams of 5 to 15 people run every day.

Use it as a starting point. Replace the company details, the catalogue items and the approval rules, then walk through each step with the service desk, the people who fulfil requests and finance. Most teams change three things: which items need approval, who owns the cost centre check and how many days a request may sit waiting for the user before it closes itself. The boundary with incident and change management is deliberately sharp, because a request that turns out to be a fault or a change is where the process most often goes wrong.

- Replace the company, the systems and the catalogue items with yours. Keep the catalogue short: 30 well-described items work better than 200 that overlap.
- Set your own approval rule. Many teams approve by price band rather than by item type, so a 30 pound cable does not wait for a manager.
- Decide the cost threshold in step 6 with finance. The number should be where a mistake becomes costly, not where the team feels like checking.
- Write down who may reclassify a request into an incident or a change, and make the rule public to your requesters.
- Choose how long a request waits for the user before it closes. 5 working days is common, but if confirmation matters for audit, set a stricter rule.
- If HR already triggers laptops and accounts for new starters, keep those out of this process so they are not counted twice.

1. Purpose and scope

This procedure describes how Kestrel Valley Freight Ltd fulfils standard IT service requests. It runs from the moment an employee submits an item from the service catalogue to the moment the request is confirmed by the user and closed with the cost booked to the right cost centre. It gives the service desk, approving managers, finance and the fulfilment

team one shared route, so that every request has a named owner, a clear approval rule and a target date, and so that requests that are really incidents or changes are moved to the right process instead of sitting in the wrong queue.

In scope

- Standard catalogue items: laptops, phones, monitors, peripherals and accessories
- Software requests for packages on the approved list, including licence assignment
- Access requests that are standard for a role, such as a shared mailbox or a team folder
- Standard services, such as a new mobile data plan or a meeting room kit loan
- Approval by the line manager, and the cost centre and budget check
- Delivery, set-up, user confirmation and closure

Out of scope

- Faults and outages, which follow the incident process
- Changes to shared systems, servers, networks or business applications, which follow the change process
- New joiner and leaver packages, which have their own onboarding and offboarding procedures
- Software that is not on the approved list, which needs a security and licensing review first
- Purchasing negotiations and supplier selection

2. Process at a glance

Item	Description
Trigger	An employee submits an item from the IT service catalogue.
Starts when	The request arrives in the service management tool with the requester, item and cost centre filled in.
Ends when	The requester confirms the item works, or the request closes automatically after 5 working days without a reply, and the cost is booked.
Inputs	Catalogue request with item, reason and cost centre, Line manager approval where the item needs one, Cost centre owner confirmation where the cost is above the threshold, Stock levels and licence counts, Supplier quotation or purchase order when the item is not in stock
Outputs	Item delivered and set up for the requester, Asset or licence recorded against the requester, Cost booked to the cost centre, Closed request with a time record, Reclassified ticket where the request was an incident or a change
Volume	About 380 requests a month, of which roughly 55% are software or access and 30% are hardware
Working hours	Monday to Friday, 08:00 to 17:30. Targets are 1 working day for access and software, 3 working days for hardware from stock and 10 working days for hardware that must be ordered.

3. Roles and responsibilities

Role	Responsibilities
Requester	Submits the request from the catalogue, answers questions from the service desk, tests the item when it arrives and confirms or rejects it.
Approving Manager	Approves or declines requests that need approval, normally the requester's line manager, and says so within 2 working days.
Service Desk Analyst	Triages each request, checks it is a standard item, routes incidents and changes elsewhere, raises purchase requests and assigns work to the right team.
Finance Business Partner	Checks the cost centre, confirms the budget for requests above the threshold and handles the monthly internal recharge.
Software Licence Manager	Checks that a licence is available for software requests, buys more when the pool is empty and keeps the licence register accurate.
Fulfilment Technician	Prepares, configures and delivers hardware, installs software that cannot be pushed

Role	Responsibilities
	remotely and records the asset against the user.
Service Desk Team Leader	Reviews aged requests every week, decides on exceptions and keeps the catalogue and approval rules up to date.

4. Systems

- Service management tool: catalogue, requests, tickets and approvals
- Configuration database and asset register inside the service management tool
- Microsoft Intune and Entra ID: device enrolment, software deployment, groups and licences
- Purchasing system for purchase requests and orders
- Licence register, kept as a controlled spreadsheet on SharePoint
- Finance system for cost centres, budgets and internal recharges
- Email and Teams for questions and notifications

5. Process map

Process diagram goes here

Draw one lane per role from section 3, the steps from section 6 in order, and a diamond for each decision in section 7.

6. Procedure, step by step

#	Step	Who	What happens	System	Output
1	Submit the request from the catalogue	Requester	Picks the item from the service catalogue, states the reason, confirms the cost centre and submits. The form will not submit without a cost centre. This takes 3 to 5 minutes.	Service management tool	Request with item, reason and cost centre
2	Triage and classify the request	Service Desk Analyst	Reads the request within 1 working hour, checks that the item is on the catalogue and that the description matches it, and sets the priority. This takes about 5 minutes.	Service management tool	Classified request with priority
3	Move incidents and changes to their own process	Service Desk Analyst	If the text describes something broken, such as a laptop that will not start, the analyst converts the request into an incident. If it asks for a change to a shared system, it becomes a change request. The requester is told why by message. This happens in about 9% of requests.	Service management tool	Incident or change record, request closed as reclassified
4	Check eligibility	Service Desk	Checks that the requester is eligible for the	Service	Eligible request,

#	Step	Who	What happens	System	Output
	and standard item	Analyst	item, for example one laptop per person every 4 years, and that any option chosen is on the standard list. Non-standard asks go to the Team Leader. This takes about 5 minutes.	management tool, Entra ID	or exception referred
5	Approve or decline	Approving Manager	Receives an approval task for items that need one: any hardware, any software with a paid licence and any access to another team's data. Approves or declines with a reason. Items under 30 pounds and standard accessories skip this step. If there is no reply in 2 working days, the system reminds the manager, then escalates to their manager after 4. About 8% of requests are declined.	Service management tool	Approval decision with reason
6	Check cost centre and budget	Finance Business Partner	For requests above 500 pounds, checks that the cost centre is open and that budget remains, and asks the cost centre owner to confirm if it does not. Below the threshold the service desk only checks that the cost centre code is valid. This applies to about 22% of requests and takes 10 to 15 minutes.	Finance system	Confirmed cost centre and budget
7	Check licence availability	Software Licence Manager	For software requests, checks that an unused licence exists in the pool. If none is free, reclaims one that has not been used for 90 days or buys more through a purchase request. This applies to about 40% of requests and takes 5 to 10 minutes when a licence is free.	Licence register, Entra ID	Licence reserved, or purchase triggered
8	Check stock or raise a purchase request	Service Desk Analyst	For hardware, checks stock in the asset register. If the item is not in stock, raises a purchase request with the approval attached and the cost centre as the account. Stock covers roughly 70% of hardware requests. A purchased item adds 5 to 8 working days.	Asset register, purchasing system	Item reserved from stock, or purchase order raised
9	Assign to the fulfilment team	Service Desk Analyst	Assigns the task to a Fulfilment Technician, or marks it for automatic deployment where software can be pushed from Intune. The assignment states the due date and the delivery location. This takes about 3 minutes.	Service management tool	Assigned task with due date
10	Prepare and configure	Fulfilment Technician	Images and enrols the device, applies the role's standard settings, assigns the licence or group and tests that the user can sign in. This takes 45 to 60 minutes for a laptop and 5 to 10 minutes for software or access.	Intune, Entra ID	Configured item ready for delivery
11	Deliver and set up	Fulfilment Technician	Hands the item to the requester at the office or sends it by tracked courier to a home address, and installs or helps with set-up where needed. Delivery to a remote site adds 1 to 2 working days. Remote deployments are sent as a notification instead.	Service management tool	Delivered item, delivery note
12	Record the asset or licence	Fulfilment Technician	Records the serial number, owner, cost centre and date against the user in the asset register, or the licence assignment in	Asset register, licence	Updated asset and licence records

#	Step	Who	What happens	System	Output
			the licence register. Finishes within 1 working day of delivery. This takes about 5 minutes.	register	
13	Test and confirm	Requester	Tests the item and confirms that it works or reports a problem on the request. A reported problem reopens the task with the technician and is recorded as a delivery defect. About 6% of requests are reopened.	Service management tool	Confirmation or reopened task
14	Chase unconfirmed requests	Service Desk Analyst	Sends a reminder after 3 working days without a confirmation, and calls the requester after 4. If there is still no reply after 5 working days, closes the request as resolved with a note. About 35% of requests close this way.	Service management tool	Confirmation, or automatic closure note
15	Close the request and book the cost	Service Desk Analyst	Checks that the asset record, licence record and time record are complete, sets the final category and closes the request. The closing action sends the cost and cost centre to finance for the recharge. This takes about 5 minutes.	Service management tool, finance system	Closed request, cost passed to finance
16	Process the monthly recharge	Finance Business Partner	Reviews the list of closed requests on the second working day of each month, checks totals against purchase invoices and posts the internal recharge to each cost centre. Disputes from cost centre owners are settled within 5 working days. This takes about 2 hours a month.	Finance system	Posted recharge journal
17	Review aged requests every week	Service Desk Team Leader	Every Monday, reviews all requests older than their target, decides who must act and records reasons for delay. Also reviews the exceptions referred in step 4 and approves or rejects them. This takes about 45 minutes a week.	Service management tool	Action list and exception decisions

7. Decision points and business rules

- Is this really a request? No: it is an incident or a change and the analyst converts it to the right record (step 3). About 9% of requests.
- Is the requester eligible and is the item standard? No: the Team Leader decides on the exception (step 4). About 4% of requests.
- Does the item need approval? Yes for hardware, paid software and access to another team's data, so the manager decides (step 5). About 8% of those are declined.
- Is the cost above 500 pounds? Yes: finance checks the budget and the owner may need to confirm (step 6). About 22% of requests.
- Is a licence free? No: the Licence Manager reclaims an unused one or buys more (step 7). About 15% of software requests.
- Is the hardware in stock? No: the analyst raises a purchase request and the target moves to 10 working days (step 8). About 30% of hardware requests.
- Did the requester confirm? No: the analyst chases and closes the request after 5 working days (step 14). About 35% of requests.

8. Exceptions

- Urgent request for a customer-facing role, such as a laptop for a dispatcher on shift (about 3%): the Team Leader approves a loan device from the spare pool the same day and the normal request follows.
- Request raised on someone else's behalf (about 10%): the requester named in the form is the owner, and the approving manager is that person's manager, not the submitter's.
- Lost or stolen device reported as a request (about 1%): converted to an incident and a security report, and the replacement follows as a new request.
- Item discontinued by the supplier (about 2%): the analyst proposes the nearest standard replacement and the requester and manager must accept it again.
- Cost centre closed during the request (about 1%): the request pauses until the owner names a new one.

9. Controls

- No request is submitted without a valid cost centre.
- Approval is recorded in the tool by the named approving manager, never by email, and nobody can approve their own request.
- Software outside the approved list is never installed without a security and licensing review.
- Every delivered device is recorded against a named owner within 1 working day.
- Licences unused for 90 days are reclaimed and reported monthly.
- Finance compares the monthly recharge to supplier invoices before posting.
- Reclassified incidents and changes keep the original request number as a reference, so nothing disappears.

10. Known issues today

- Requesters pick the nearest catalogue item and describe a fault in the free text, so the analyst finds the real problem only at triage.
- Approvals wait in a manager's inbox for several days, and the clock on the request keeps running.
- Stock figures in the asset register are out of date after returns, so some hardware is promised and then ordered.
- The licence register is a spreadsheet and does not match Entra ID assignments after a month.
- Requesters do not confirm, so a third of requests close without knowing whether the item works.
- Cost centre owners dispute recharges because they never saw the request.

11. RACI matrix

R = responsible (does the work), A = accountable (owns the outcome), C = consulted, I = informed.

Activity	Requester	Approving Manager	Service Desk	Finance	Licence Manager	Technician	Team Leader
Submit and describe the request	A/R	I	C				
Triage and reclassify incidents and changes	I		A/R				C
Approve the request	I	A/R	C				
Check cost centre and budget	I	C	R	A			
Check and reserve licences			C		A/R	I	
Order stock that is missing	I		A/R	C			I
Configure and deliver the item	I		A			R	
Confirm and close the request	R		A	I	I	I	
Review aged requests and exceptions		I	R				A

12. KPIs

KPI	Definition	Target
Requests fulfilled within target	Share of closed requests delivered inside the target for their type: 1 working day for access and software, 3 for stock hardware, 10 for ordered hardware. Counted from approval to delivery.	[set]
Time waiting for approval	Average working days between the approval task being created and the manager's decision. Target 1 day.	[set]
Requests reclassified at triage	Share of submitted requests converted to an incident or a change. A high figure points to a confusing catalogue.	[set]
Requests reopened by the requester	Share of delivered requests where the user reports a problem on the request. Target below 5%.	[set]
Requests closed without user confirmation	Share of requests closed automatically after 5 working days. Shown next to the reopen rate.	[set]
Stock accuracy	Share of hardware requests promised from stock that were delivered from stock, checked monthly.	[set]

13. Revision history

Version	Date	Author	Change
1.0	[date]	[name]	First as-is version

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