



# The Request Management System Users Guide

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# Title page 1

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*This page intentionally starts on an odd page, so that it is on the right half of an open book from the readers point of view. This is the reason why the previous page was blank (the previous page is the back side of the cover)*

# The Request Management System Users Guide

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*All the people who contributed to this document, to mum and dad and grandpa, to my sisters and brothers and mothers in law, to our secretary Kathrin, to the graphic artist who created this great product logo on the cover page (sorry, don't remember your name at the moment but you did a great work), to the pizza service down the street (your daily Capricciosas saved our lives), to the copy shop where this document will be duplicated, and and and...*

*Last not least, we want to thank EC Software who wrote this great help tool called HELP & MANUAL which printed this document.*

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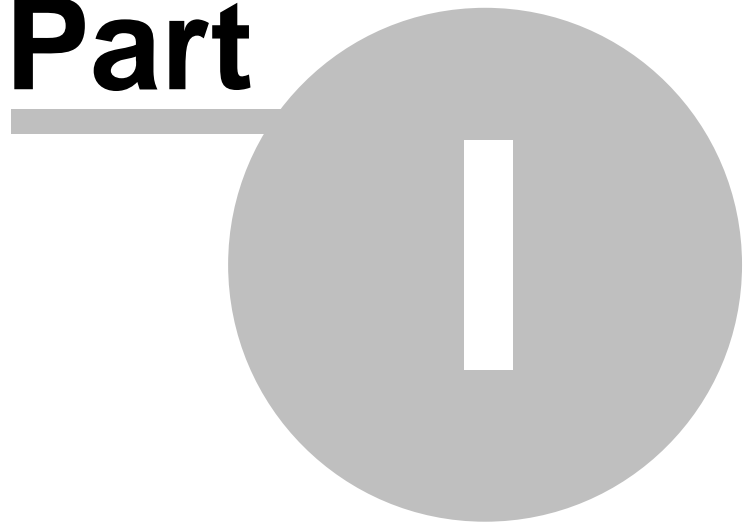
# Foreword

This is just another title page  
placed between table of contents  
and topics

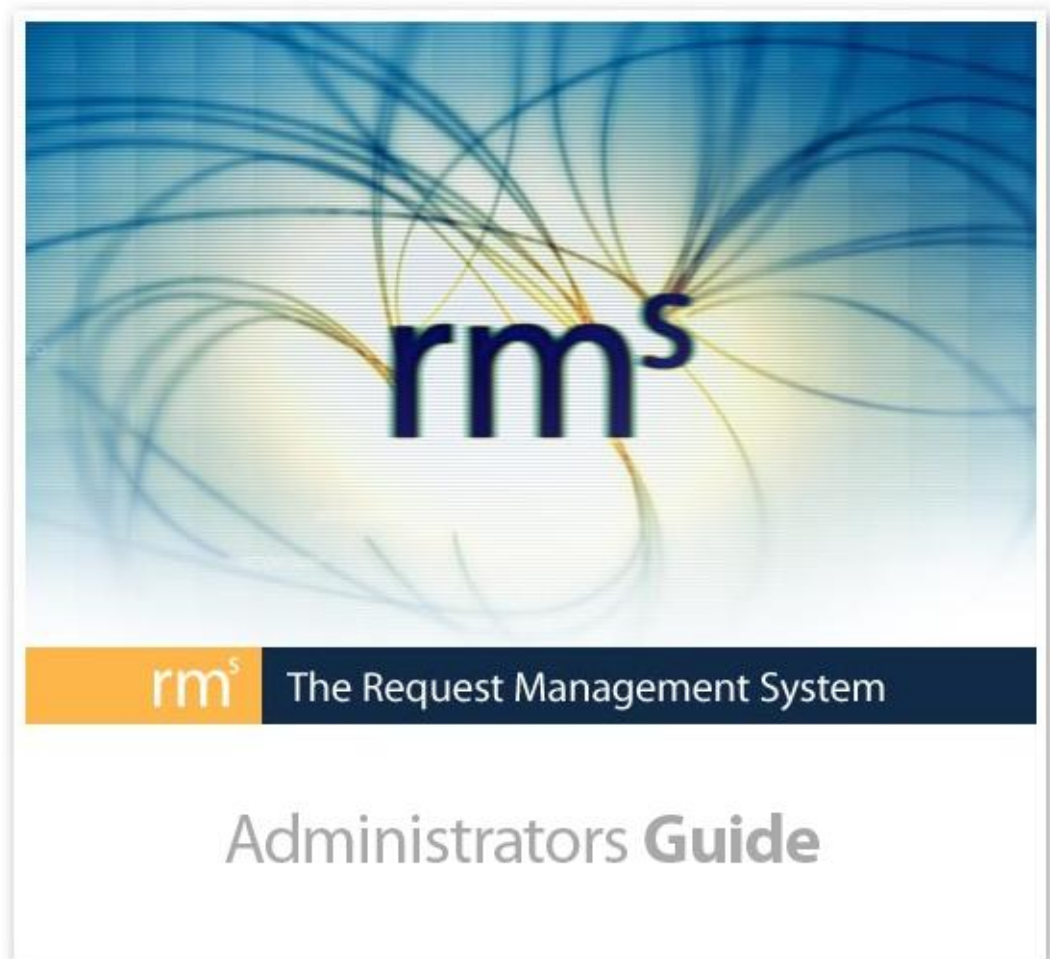
# Top Level Intro

This page is printed before a new  
top-level chapter starts

# Part



# 1 Administrators Guide



Welcome to the Request Management System (rms). rms is a software application for creating and tracking service requests from created by users through your fulfillment process. rms can be used for any Service Catalog requiring a workflow to move work from originators to other people or organizations for fulfillment. rms replaces the disconnected processes of e-mail, voice mail, meetings, notes and spreadsheets with a connected process with centralized tracking and real-time user notification.

rms is flexible and easily configured to meet your organization's needs. This manual covers the configuration process in depth. If you want to get a quick overview of this process, see the rms Installation and Quick Start Manual. rms configuration uses point-and-click screens that present forms for organizing rms features to meet your organization's requirements. You should use this manual as both a learning tool and reference. Read the manual to familiarize yourself with the administrative tasks for managing your rms installation. Once you begin using rms, use this manual as a reference.



The best way to start a new rm<sup>s</sup> Service Catalog is to:

1. Define Field Types, including Priorities and enter them into rm<sup>s</sup>. You can rename default Field Type Priority as desired.
2. Define Request Types and enter them into rm<sup>s</sup>. Request Types are an optional, special radio button array field type.
3. Define the form fields for creating a Request and enter them into rm<sup>s</sup>.
4. Define the workflow and enter it into rm<sup>s</sup>.
5. Define all Users who will be Administrators and enter them into rm<sup>s</sup> or extract them from your network's Active Directory and set them up as rm<sup>s</sup> Administrators.
6. Define Users and enter them into rm<sup>s</sup> or extract them from your network's Active Directory.
7. Define Groups and enter them into rm<sup>s</sup> or extract them from your network's Active Directory and Teams
8. Assign Users and Groups to Catalogs and Steps.
9. Define workflow exceptions as required.

Following this order will help you organize your Service Catalog into its logical components. If you need additional help setting up your Catalog, IT OnTime provides consulting help in workflow design and project management. You can reach IT OnTime by emailing [sales@it-ontime.com](mailto:sales@it-ontime.com) or by calling (866) 210-5205 Ext. 100. If you have a problem with rm<sup>s</sup> that you cannot solve with this manual or the rm<sup>s</sup> Users' Manual, contact IT OnTime at [techsupport@it-ontime.com](mailto:techsupport@it-ontime.com).

Designed and Developed in Thailand by [IT OnTime, Inc.](http://ITOnTime.com)

## 1.1 rms Glossary

The following provides the rm<sup>s</sup> definition of terms you will see in this manual. When terms are used in the documentation as defined in this glossary, the first letter is capitalized.

**Action** - A button that allows a User to change the state of any object within rm<sup>s</sup>. Almost all rm<sup>s</sup> screens have one or more Action buttons.

**Action(s)** - A triplet of information the includes an object, its location and one of three actions, ADD, CHANGE, REMOVE

**Active** - Available for use within rm<sup>s</sup>.

**Administrator** - A person who can make changes to rm<sup>s</sup>. rm<sup>s</sup> supports four Administrator classes.

- **System Administrators** - Can manage an rm<sup>s</sup> instance. Can add Catalogs, Import objects using the ADSI link, assign users to Catalogs and can create Administrators of any class. They see everything within their rm<sup>s</sup> instance.
- **Catalog Administrators** - Can manage an rm<sup>s</sup> Service Catalog. They can create and manage Forms, change workflows, can create Catalog, Task and User Administrators and can do all User management functions within their Catalog. They see everything within their Service Catalog. A User can be a Catalog Administrator for more than one Service Catalog.
- **Task Administrators** - Can manage the Request flow within a Catalog. They can manage and report all Requests and create User Administrators. A User can be a Task Administrator for more than one Service Catalog.
- **User Administrators** - Can manage Users within their rm<sup>s</sup> Catalog. They may add or deactivate rm<sup>s</sup> users who are assigned only to their catalog, manage groups and teams and assign users to Steps. A User may be a User Administrator for more than one Service Catalog.

A User can belong to different Administrator classes in different Catalogs. For example, User A can be a Catalog Administrator in Catalog 1 and a User Administrator in Catalog 2.

**ADSI Group** - A user Group defined in the Active Directory on the network and imported into rm<sup>s</sup> with the ADSI tools. Changes to ADSI Group membership are not allowed within rm<sup>s</sup>. Changes to the Active Directory are reflected within rm<sup>s</sup>.

**ADSI User** - An rm<sup>s</sup> User defined in the Active Directory on the network and imported into rm<sup>s</sup> with the ADSI tools.

**Approval** - When reviewing a Request, a user must choose an Action. The activity of moving a Request to a next workflow Step is called Approval.

**Archived Request** - A Request that is either Completed or Canceled and then categorized as Archived. Archived Requests are only visible to Administrators. Requests may be deleted only after they have been Archived. Deleting a request removes it from the database and also removes all associated uploaded documents from the server.

**Branch** - A place in the Workflow where the User approving a Request must decide

between alternate steps. When doing the Approval, the user will see a choice of possible next Steps and must select one before completing the Approval.

**Canceled Request** - A Request marked as canceled by a Request Reviewer. The Step must have the Cancel attribute selected to make this action available. Once Canceled, processing of the Request stops.

**Catalog** - A set of Forms, Users, Workers and Administrators within rm<sup>s</sup>. A Catalog covers a business activity such as Web development, a computer application system or graphic design projects. Sometimes called a **Service Catalog**. rm<sup>s</sup> uses Catalog and Service Catalog interchangeably.

**Completed Request** - A Request that has reached the end of the workflow and been approved at the last Step. It is available for viewing and reporting but processing stops on that Request.

**Field Types** - Data fields with predefined values. These may be radio buttons, check boxes or combo boxes.

**Form** - A set of Workflow Steps within a Service Catalog. Forms come in two varieties  
**Form** - This is referred to as a main Form because it has a Request Creation Step as the initial Step. In the absence of either a Common Form or a Sub-Workflow, Requests flow from the Request Creation Step to the end of the workflow unless Returned by a Request Approver.

**Common Form** - A workflow that may be shared between 2 or more Forms. Used for common processes within a Service Catalog. Common Forms do not have a Request Creation Step.

**Group** - A set of Users within a Catalog who will be assigned the same privileges at Steps. These function like Groups in most operating system security systems.

**Junction Form** - A screen form used for describing the relationship between main Forms and Common Forms.

**Request** - A unit of work within rm<sup>s</sup>. The attributes of the Request are defined in the Request Creation form. A Request moves through the workflow until it is either completed or canceled.

**Request Approver** - The person reviewing the Request at a step and either Approving it, Canceling it or Returning it. A Request Approver may be any person assigned to that Step within rm<sup>s</sup> unless otherwise restricted. Restrictions are: Assigned Users from the preceding Step; Creator or Administrator review only; Team Membership. These are described in this manual.

**Request Creation Form** - The screen that the User sees when first creating a Request. Defined by a System or Catalog Administrator.

**Request Creation Step** - The first Step in a main Form's workflow. It has the special attribute of have a Request Creation Form.

**Request Creator** - The User creating the Request.

**Request Owner** - The User creating the Request.

**Request Reviewer** - The User who is examining the work done to fulfill the Request. This may include reviewing a Request to see if it can be fulfilled; performing work specified in the Request; performing Quality Assurance or sending or installing the completed work product.

**Return** - An alternative to the usual next Step within the workflow. A Return Step can be any place within the workflow as allowed by rm<sup>s</sup>.

**Secured Field** - A data field encrypted for storage in the database. It is only visible when reviewing a Request. In emails, \*\* Secured \*\* appears in place of the value.

**Service Catalog** - A set of Forms, Users, Workers and Administrators within rm<sup>s</sup>. A Catalog covers some business activity such as Web development, a computer application system or graphic design projects. Also called a **Catalog**. rm<sup>s</sup> uses Catalog and Service Catalog interchangeably.

**Step** - A point within a workflow when someone performs some fulfillment activity. Steps have various attributes that are defined by the Administrator constructing the workflow.

**Sub-Workflow** - A set of Steps within a Form that provides alternative routing for a Request. Sub-Workflows have no Request Creation form. At the Step prior to the beginning of the Sub-Workflow, the Request Approver must select routing the Request through the Sub-Workflow, along the main Workflow or through a Common Form if available. Forms may have an unlimited number of Sub-Workflows. Multiple Sub-Workflows may branch off the main Workflow at the same Step. Sub-Workflows may not have Sub-Workflows but Sub-Workflows may join to Common Forms.

**Team** - Users who work together. Within rm<sup>s</sup>, Team members will see each others Requests but other than System, Catalog or Task Administrators, no one will see their Requests.

**Template** - Items that you may use when defining rm<sup>s</sup> your forms. Forms and Field Types may have Templates.

**User** - A person who is authorized to login onto rm<sup>s</sup>. In general, User covers anyone who is performing activities for moving Requests through the workflow. Users may be defined within rm<sup>s</sup> or imported from the Active Directory on the network. In either case, they function identically within rm<sup>s</sup>. Administrators are Users when assigned to Steps.

**Worker** - A person who is listed within rm<sup>s</sup> as a Request fulfiller. Their time worked on a Request may be reported by the person Approving the Request. However, they have no access rights to rm<sup>s</sup>. They may not login, create or Approve Requests. They are entered into rm<sup>s</sup> or are imported using the ADSI tools.

## 1.2 Screen Conventions

rm<sup>s</sup> tries as much as possible to use GUI features in common ways. The following are show to make usage situations as clear as possible.

Check boxes to the left of items in a list are used to select items for processing. Multiple check boxes can be checked simultaneously. The processing for checked items is invoked by an Action button at the bottom of the list. To select all items in the list, select the check box in the list header. Clicking a box with a check mark will clear the check mark.

### Field Item Manager

<input type="checkbox"/>	Order No	Name	Action
<input type="checkbox"/>	1	Luminate	<input type="button" value="Edit"/>
<input type="checkbox"/>	2	Glossy UVs	<input type="button" value="Edit"/>
<input type="checkbox"/>	3	Special color	<input type="button" value="Edit"/>
<input type="checkbox"/>	4	emboss	<input type="button" value="Edit"/>
<input type="checkbox"/>	5	+ photo	<input type="button" value="Edit"/>

An asterisk (\*) appears on forms next to required fields.

### Request Create

Request Details

* Subject	<input type="text"/>
* Priority	<input type="radio"/> Normal <input type="radio"/> Urgent
* Creator Email Address	<input type="text"/> Ex. yourname@mail.com
* Phone	<input type="text"/>
* Due Date	<input type="text"/> <input type="button" value="EX"/> ( MM/DD/YYYY )
* Brief	<input type="text"/>
* Please Note	<input type="text"/>
* Quantity	Please Select Quantity <input type="button" value="v"/>
* option(s)	<input type="checkbox"/> Luminate <input type="checkbox"/> Glossy UVs <input type="checkbox"/> Special color <input type="checkbox"/> emboss <input type="checkbox"/> + photo

\* Denotes a required field

To move pre-defined objects to and from lists, select the objects and click the button indicating the action desired. For example, clicking the "Remove from Current List" button below will remove the selected entries from the list:

**Account Executive**

	Name	Read	Update	Cancel	Allow Email On/Off	Receive Email	Action
<input type="checkbox"/>	Demo Admin (demo admin)	✓	✓	✓	✓	✓	Edit
<input type="checkbox"/>	Demo User (demo user)	✓	✓	✓	✓	✓	Edit
<input type="checkbox"/>	Rms Admin (rmsadmin)	✓			✓	✓	Edit

**Users**

Local Users   
  Global Users

	Name	Read	Update	Cancel	Allow Email On/Off	Receive Email	
<input type="checkbox"/>	<u>Group A</u> Demo Admin (demo admin) Demo User (demo user)	✓	✓	✓	✓	✓	
<input type="checkbox"/>	Client (client)	✓	✓	✓	✓	✓	

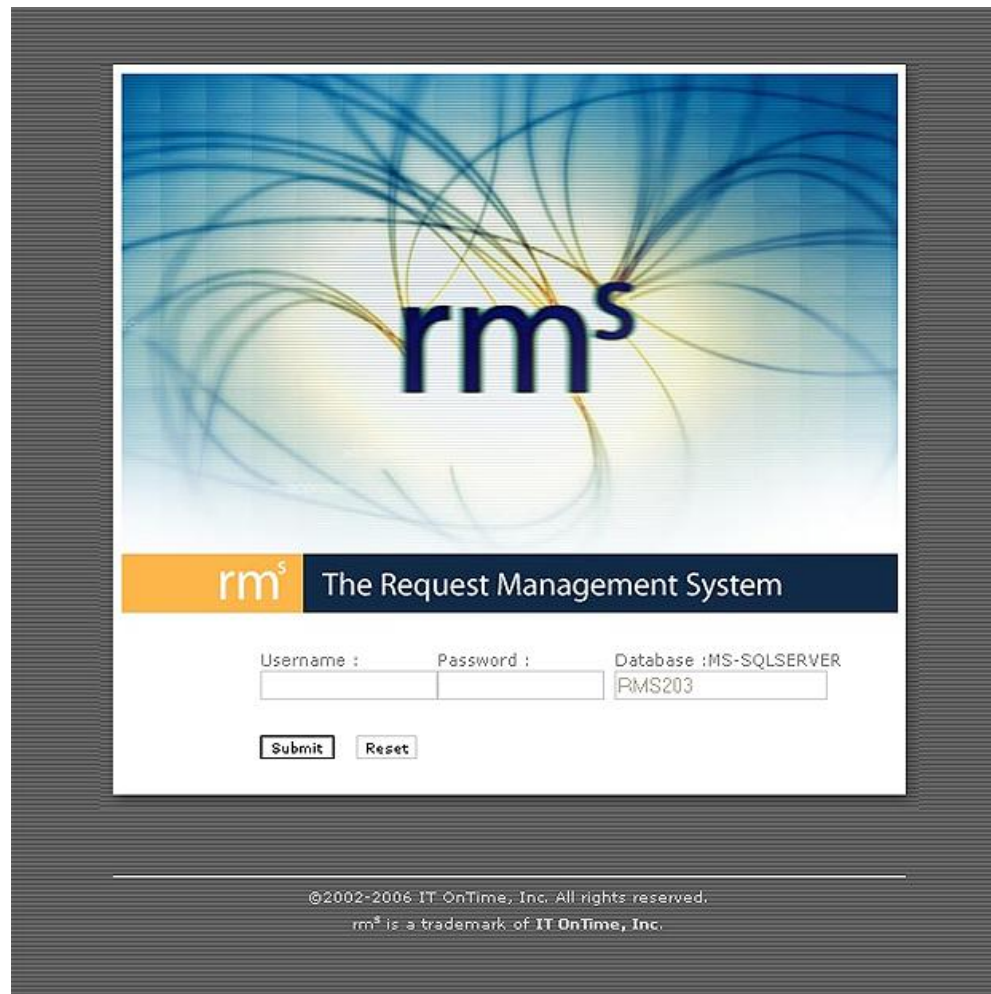
Certain item within  $rm^s$  are part of the structure and cannot be deleted or made inactive. For example, the Field Type Priority is part of  $rm^s$  and cannot be made inactive. The Active radio button for Priority is grayed out.

<input type="checkbox"/>	2	Priority	Radio : Priority	Yes	Edit
--------------------------	---	----------	------------------	-----	------

### 1.3 Navigation Overview for Administrators

To access  $rm^s$ , start a Web browser such as Microsoft Internet Explorer in the usual way. In the Address box of the browser, type the URL provided to you by your network administrator, person installing  $rm^s$  or by IT OnTime if you are using  $rm^s$  as an ASP product. The browser will display the following screen.

Figure 1.1 - rm<sup>s</sup> Login Screen



rm<sup>s</sup> The Request Management System

Username : Password : Database :MS-SQLSERVER  
RMS203

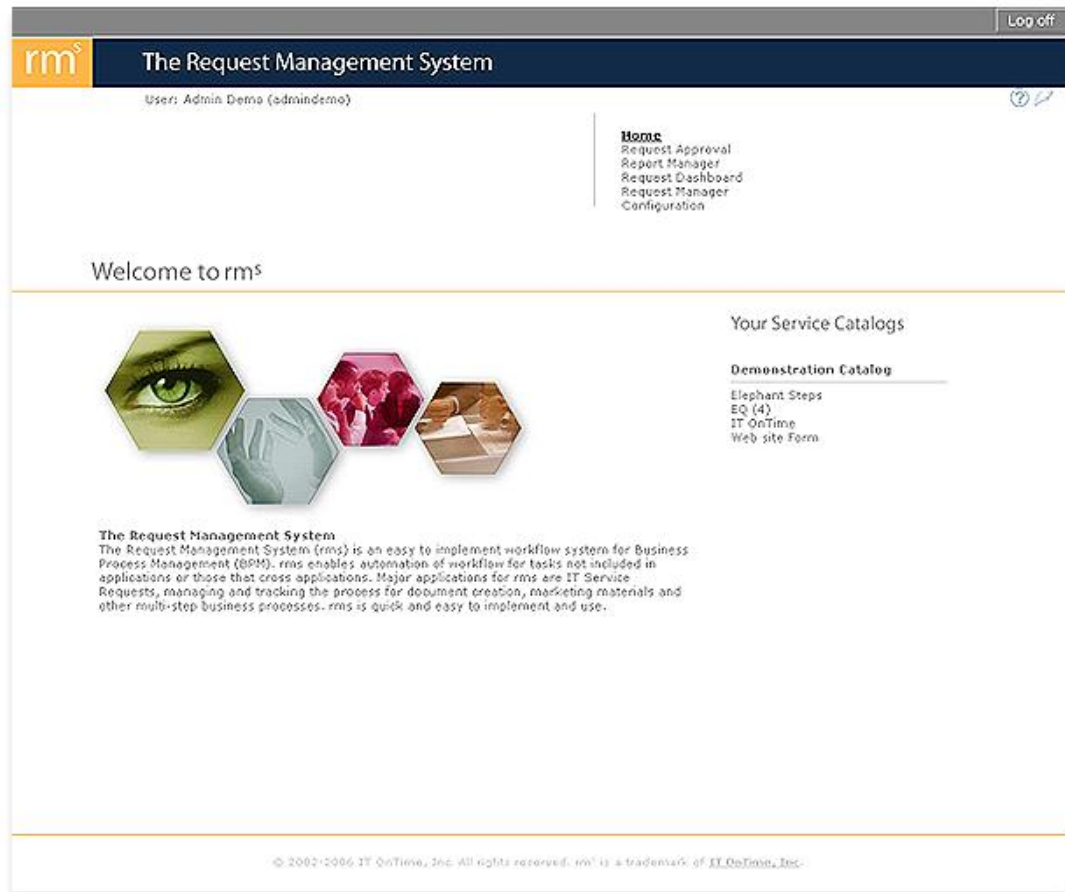
Submit Reset

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rm<sup>s</sup> is a trademark of IT OnTime, Inc.

To log in, type your user name in the box labeled Username and your password in the box labeled Password. Click on the Submit button. If successful, the browser will display the following screen. Some details may differ such as the list of Service Catalogs you have permission to access. The message on the lower left may be different. This can be customized by your installation.

The Main Screen is the central control point for rm<sup>s</sup>. It provides access to all parts of rm<sup>s</sup>. The following shows the main screen's features.

Figure 1.2 - Main Screen - Administrator Version



The screen has four main interest areas. At the top, a bar with three entries. They are: the currently logged in user; the question mark (?) that is the help button and the small feather that is the About button. This bar appears on every rms screen except for pop-up windows. **Please note** - rms makes extensive use of pop-ups. Please turn off any pop-up blocking software or allow pop-ups for the rms URL. Certain toolbars such as the Earthlink toolbar over-manage browser behavior or do not allow selective pop-ups. These must be uninstalled to use rms.

Immediately below this bar is the navigation for areas of interest within rms. It contains the following items.

Home - Returns you to the page shown above.

Request Approval - The rms function for creating and reviewing requests. For more information on using this function, see the rms Users Guide.

Report Manager - The Report Manager allows you to view all of your own requests. For more information on using this function, see the rms Users Guide.  
Request Dashboard - A way to graphically view the status of Requests with point-and-click drill down. This feature is new in rms Release 2.3.

Request Manager - The rms function for managing all requests at one time. The Request Manager functions much like Request Approval. System, Catalog and Task Administrators can access the Request Manager.

Configuration - The rms function for setting up and managing rms Service Catalogs. This manual explains the Configuration functions in detail.



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Configuration also contains personal settings documented in the rm<sup>s</sup> Users Manual.

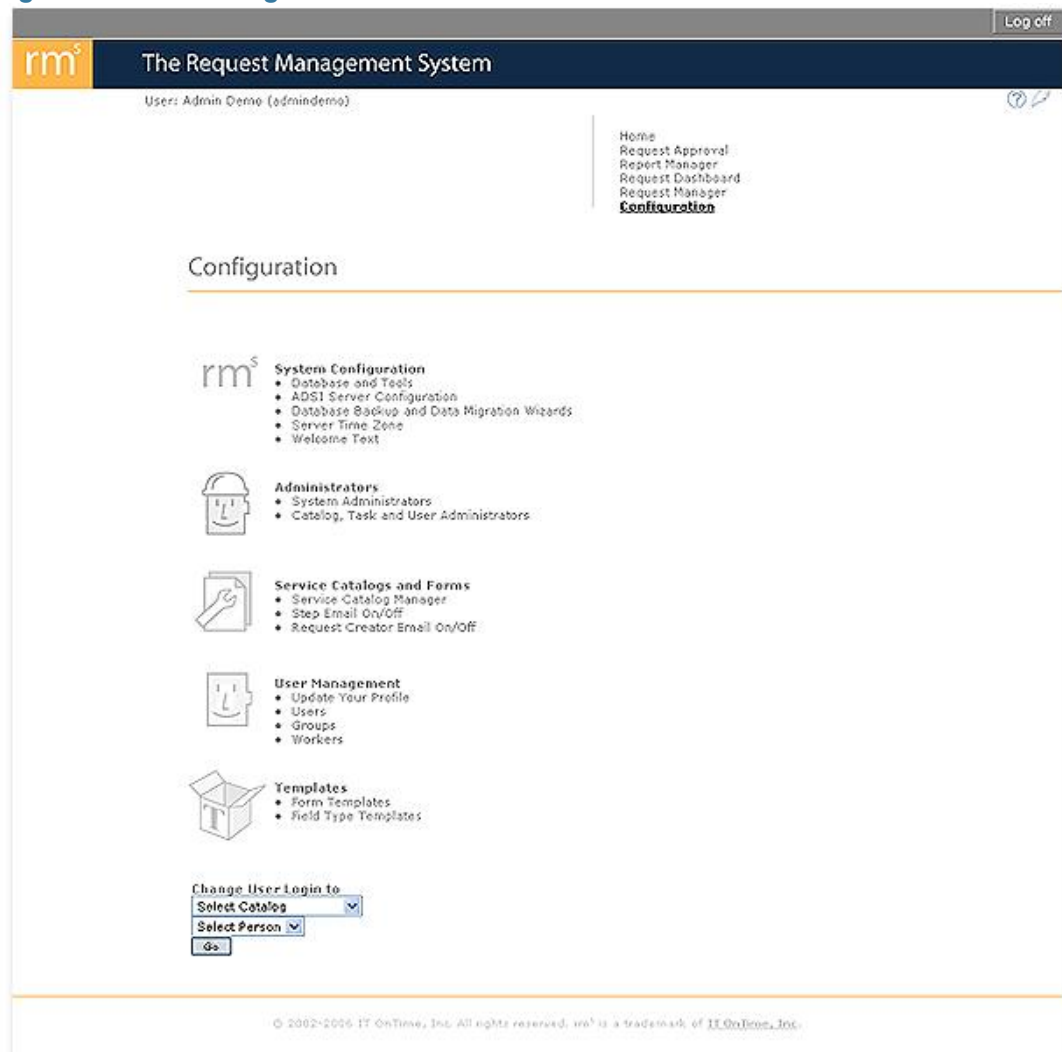
Immediately below are two other areas. On the left is the Welcome to rm<sup>s</sup> text. This area contains one or more messages of information about your rm<sup>s</sup> installation. It is controlled by the System Administrator for your installation.

Immediately to its right is Your Service Catalogs. This is the list of rm<sup>s</sup> Service Catalogs that you can access as a User. The Catalog name is underlined in bold type. Below each Catalog name is the list of forms where you are assigned as a User. If a number appears in parens () next to the form name, you have active requests to review. What this means and what it entails is discussed in the section of rm<sup>s</sup> Users Guide, Request Approval.

- [Configuration Summary for Administrators](#)

### 1.3.1 Configuration Summary For Administrators

Configuration is the main screen for all rm<sup>s</sup> Administrative functions. It provides access to the tools for building and maintaining Service Catalogs and Forms, creating Users and assigning them to Steps within Forms and related activities.

Figure 1.3 - rm<sup>s</sup> Configuration Screen for Administrators

Tools are grouped as follows:

**System Configuration** – Overall configuration of the current rm<sup>s</sup> instance. Available only to System Administrators.

Database and Tools - Select the database, email and upload tools from those currently available within rm<sup>s</sup>. You will need to separately license each of these from their respective supplier.

ADSI Server Configuration - An option for configuring access to user information stored the Active Directory.

Database Backup and Data Migration Wizards - Tools for moving rm<sup>s</sup> data between databases. Also, used when upgrading you rm<sup>s</sup> license to use more powerful database management systems such as Microsoft SQL Server or Oracle Oracle database. Functions as a backup utility for rm<sup>s</sup> databases.

Server Time Zone - The Web server's time zone specified from 0 GMT. Same as the Time Zone setting on most servers.

Welcome Text - The text that appears on the rm<sup>s</sup> Welcome screen when Users log in.

**Administrators** – Define and update current rm<sup>s</sup> Administrators.

System Administrators - Make an existing Administrator or User a System Administrator. Available only to System Administrators.

Catalog, Task and User Administrators - Make an existing User an Administrator or change the Administrative class for an existing Administrator.

**Service Catalogs and Forms** – Create, update and manage rm<sup>s</sup> Catalogs and their Forms. Also includes Email on/off controls as described in the rm<sup>s</sup> Users Manual.

Service Catalog Manager - The tools for creating and maintaining Service Catalogs and their Forms. Only System and Catalog Administrators can access the structural tools. Task and User Administrators can access the User assignment functions - Assign Users and Workflow Exceptions.

Step Email On/Off - Control receipt of email for Catalog Requests at assigned Steps. Documented in the rm<sup>s</sup>Users Manual.

Request Creator Email On/Off - Controls receipt of emails notifying you as your Requests move through the workflow. Documented in the rm<sup>s</sup> Users Manual.

**User Management** – Create and manage users as well as control your user settings.

Update Your Profile - For rm<sup>s</sup> defined users, change your phone number, name, password, email preferences or rm<sup>s</sup> display style. Documented in the rm<sup>s</sup> Users Manual. ADSI users cannot change personal information but can change their email type and display preferences.

Users - User Management tools. The Assign Users to Catalogs function contained here is only available to System Administrators.

Groups - Group Management tools. The Assign Groups to Catalogs function contained here is only available to System Administrators.

Workers - Worker Management tools. The Assign Workers to Catalogs function contained here is only available to System Administrators.

**Templates** – Create and manage predefined items within rm<sup>s</sup>.

Form Templates - Prototype workflows with Request Creation Forms. IT OnTime supplies several. System Administrators may add or edit Form Templates.

Field Type Templates - Prototype Request Creation Form fields. Includes radio buttons, check boxes and combo boxes. IT OnTime supplies a prototype Priority form field. System Administrators may add or edit Field Type Templates.

In this manual, you will see a navigation summary before each screen. All navigation summaries start by clicking on Configuration.



# Top Level Intro

This page is printed before a new  
top-level chapter starts

# Part



## 2 Administrators

### Concepts:

Service Catalogs are the basic structural unit within rm<sup>s</sup>. Service Catalogs are a concept within Service Delivery Management (SDM). A Service Catalog presents users with the a menu of options for requesting and receiving services. For example: A Human Resources department may have a Service Catalog composed of three services, new hiring, employee review and vacation scheduling. Each has a unique set of information requirements and may share common processes. Similarly, an IT department may set up a Service Catalog for Web sites. Each Web site may have its own processes but all probably share processes to fulfill requests. A Catalog may represent a web site, an application, a process such as dispatching technicians to repair PCs. Forms represent the situations within the Catalog where users will submit requests such as "Application Enhancements," "Bugs," "Sales Leads" or "Building Maintenance – 100 Main Street."

Within a Service Catalog, the unit for submitting and managing Requests is a Form. Some Forms define inputs for Requests and a will have one or more Steps along which Requests move to completion. A Service Catalog may contain one or more Forms.

There are two types of Forms:

**Form** - Contains a Request Creation Form as the first workflow Step. This is the entry form for creating a Request.

**Common Form** - A Form that is shared by multiple Forms within a Catalog. Requests move from a Form into a Common Form and then may return to the Form or go to completion within the Common Form.

Any Form may have branches by creating Sub-Workflows. A **Sub-Workflow** is a set of alternative Steps that start and end at specific steps within a Form.

### Business Rules and Defaults:

You may define Service Catalogs up to the limit set by your rm<sup>s</sup> license.

Service Catalogs are independent of each other.

Each Service Catalog must have a unique name.

When a Catalog is defined, it is marked as active by default.

Catalogs may have any number of Forms and Common Forms up to the limit set by your rm<sup>s</sup> license.

A Form must be at least 1 Step long.

Common Forms are defined at the Service Catalog level.

Common Forms are available to all Forms within a Service Catalog.

Common Forms do not have Request Creation Steps.

A Form may have any number of Junctions with any number of Common Forms.

---

A Form may have one or more Sub-Workflows that allow for alternative processing of requests.

A Sub-Workflow is available only within its parent Form.

Sub-Workflows do not have Request Creation forms.

Deleting a Form deletes all Sub-Workflows belonging to that Form.

A Form may contain any number of branches created using Sub-Workflows.

Users submit Requests at the Form level.

A Request is completed when it is approved at the last available Workflow Step. The number of Steps to complete a Request may vary because it may follow a different path than another Request because of Sub-Workflows and Common Forms.

Users and Groups are assigned to Catalogs.

Users and Groups are assigned privileges at the Form level.

Catalog, Task and User Administrators exist at the Catalog level and can act across all Forms within a Catalog.

## Service Catalog Control: (System Administrators Only)

To add a Catalog, Click the Add button on the Service Catalog Manager page. This function is only available to System Administrators.

*Navigation: Configuration->Service Catalog Management*

**Figure 3.1 - Service Catalog Manager**

The screenshot displays the Service Catalog Manager page. At the top, there is a navigation menu with options: Home, Request Approval, Report Manager, Request Dashboard, Request Manager, and Configuration (highlighted). Below the menu, the page title is "Configuration" and the breadcrumb trail is "Configuration > Service Catalog Manager". The main content area is titled "Service Catalog Manager" and contains a table with the following data:

<input type="checkbox"/>	Name	Action
<input type="checkbox"/>	Beer Project Time Zone: 1 07:00 Bangkok, Hanoi, Jakarta	<a href="#">Edit Catalog</a> <a href="#">Form Management</a> <a href="#">Field Type Management</a> <a href="#">Step Assignment</a> <a href="#">Team Management</a> <a href="#">Support</a>
<input type="checkbox"/>	Demonstration Catalog Time Zone: 1 07:00 Bangkok, Hanoi, Jakarta	<a href="#">Edit Catalog</a> <a href="#">Form Management</a> <a href="#">Field Type Management</a> <a href="#">Step Assignment</a> <a href="#">Team Management</a> <a href="#">Support</a>
<input type="checkbox"/>	Son Catalog Time Zone: 1 00:00 Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London	<a href="#">Edit Catalog</a> <a href="#">Form Management</a> <a href="#">Field Type Management</a> <a href="#">Step Assignment</a> <a href="#">Team Management</a> <a href="#">Support</a>
<input type="checkbox"/>	Test Group Catalog Time Zone: 1 07:00 Bangkok, Hanoi, Jakarta	<a href="#">Edit Catalog</a> <a href="#">Form Management</a> <a href="#">Field Type Management</a> <a href="#">Step Assignment</a> <a href="#">Team Management</a> <a href="#">Support</a>

At the bottom of the table, there are buttons for "Add", "Delete", and "Back". The footer of the page contains the text: "© 2002-2006 IT OnTime, Inc. All rights reserved. rm<sup>s</sup> is a trademark of IT OnTime, Inc."

To delete a Catalog, select the Catalog by clicking on the check box next to the Service Catalog name. Click the Delete button. IT OnTime does not recommend deleting Catalogs as this loses all history associated with them. Instead, mark the Catalog as Inactivate. Click the Edit Catalog button and click the No radio button next to Active. See Figure 3.2 to see the Edit form. The Delete and Active functions are only available to System Administrators.

After clicking the Add button or clicking on the Edit button for an existing Catalog, rm<sup>s</sup> presents the following screen.



Navigation: Configuration->Service Catalogs and Forms->Service Catalog Management->Add

Navigation: Configuration->Service Catalogs and Forms->Service Catalog Management->Edit

**Figure 3.2 - Service Catalog Manager Add/Edit**

The screenshot shows the 'Service Catalog Edit' form within the 'The Request Management System' interface. The user is 'Admin Demo (admindemo)'. The breadcrumb trail is 'Configuration > Service Catalog Manager'. The form title is 'Add/Edit Service Catalog'. The form fields are:

Service Catalog Edit	
Name	<input type="text"/>
Time Zone	GMT 00:00 Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London ▾
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No

Buttons: Save, Cancel

Footer: © 2002-2006 IT OnTime, Inc. All rights reserved. rm<sup>s</sup> is a trademark of IT OnTime, Inc.

Name is the rm<sup>s</sup> display name for the Service Catalog.

Specification of time zone controls the time stamp on Approvals and emails. Having a common time zone avoids confusion when workers are in different time zones with different local computer times.

If Active is changed to No, then users can no longer access the Catalog. However, Administrators may still report on previous Request activity for the Catalog.

## Form Control: (System and Catalog Administrators Only)

Once you have created a Catalog, then you need to add Forms. Click on the Form Management button. rm<sup>s</sup> will display the following screen.

*Navigation: Configuration->Service Catalogs and Forms->Service Catalog Management->Form Management*

**Figure 3.3 - Form Manager**

The screenshot displays the 'Form Manager' interface. At the top, there is a header with the 'rm<sup>s</sup>' logo and the text 'The Request Management System'. Below the header, the user is identified as 'Admin Demo (admindemo)'. A navigation menu on the right includes 'Home', 'Request Approval', 'Report Manager', 'Request Dashboard', 'Request Manager', and 'Configuration'. The main content area is titled 'Configuration' and shows a breadcrumb trail: 'Configuration > Service Catalog Manager > Form Manager'. Below this, there is a 'Form Manager' icon and the text 'Form(s) for Beer Project'. A table lists the forms with columns for 'Name', 'Active', and 'Action'. The table contains five rows of form data. Below the table are buttons for 'Add', 'Delete', and 'Back'. At the bottom of the page, there is a copyright notice: '© 2002-2006 IT OnTime, Inc. All rights reserved. rm<sup>s</sup> is a trademark of IT OnTime, Inc.'

<input type="checkbox"/>	Name	Active	Action
<input type="checkbox"/>	common form 2 (Common Form)	Yes	Edit Form Workflow User Assignment Junction Form
<input type="checkbox"/>	common form1 (Common Form)	Yes	Edit Form Workflow User Assignment Junction Form
<input type="checkbox"/>	Form 1	Yes	Edit Form Workflow User Assignment Workflow Exceptions Junction Form
<input type="checkbox"/>	form 2	Yes	Edit Form Workflow User Assignment Workflow Exceptions Junction Form
<input type="checkbox"/>	manual form	Yes	Edit Form Workflow User Assignment Workflow Exceptions Junction Form

If this Catalog already contains Forms, the screen will list them. If there are no Forms, the list will be empty. To add a new Form, click the Add button. The following screen will display.

Navigation: Configuration->Service Catalogs and Forms->Service Catalog Management->Form Management->Add

Navigation: Configuration->Service Catalogs and Forms->Service Catalog Management->Form Management->Edit

**Figure 3.4 - Form Manager Add/Edit Form**

The screenshot shows the 'Edit Form' configuration page in the Request Management System. The page header includes the 'rm<sup>s</sup>' logo and the text 'The Request Management System'. The user is identified as 'Admin Demo (admin@demo)'. A navigation menu on the right lists: Home, Request Approval, Reports Manager, Request Dashboard, Request Manager, and Configuration. The breadcrumb trail is 'Configuration > Service Catalog Manager > Form Manager'. The main heading is 'Add/Edit Form'. Below this is the 'Edit Form' section with the following fields:

Name	<input type="text"/>
Common Form	<input type="radio"/> Yes <input checked="" type="radio"/> No
Template Name	User Defined <input type="text"/>
Attachment Extension(s) (Example: *.zip, *.doc)	<input checked="" type="radio"/> Included <input type="text" value="*.doc,*.zip,*.rar"/> <input type="radio"/> Excluded <input type="text" value="*.asp"/>
Allow Sub-Workflow?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Active?	<input checked="" type="radio"/> Yes <input type="radio"/> No

At the bottom of the form are 'Save' and 'Cancel' buttons. The footer contains the copyright notice: '© 2002-2006 IT OnTime, Inc. All rights reserved. rm<sup>s</sup> is a trademark of IT OnTime, Inc.'

Common Form defines whether or not this will be a sequence of Steps available to other Forms within the Catalog. An example of Common Form use is a programming group that services both enhancement requests and bugs. Bugs require different information than enhancement requests and most of the time flow through different reviewers. However, once they reach programming, they may be assigned to the same programmers for implementation. Use the radio button to make your selection.

Template Name allows you to start with a pre-defined template. The drop down lists all available templates. If you select User Defined, rm<sup>s</sup> will not load any predefined steps. If you choose a Template, you can edit the Workflow and the Request Creation Form as if you were defining your own form from scratch. IT OnTime supplies sample templates. Any rm<sup>s</sup> System Administrator can define additional templates.

Name is the screen name for this Form. It will be used throughout rm<sup>s</sup> to identify Requests created for this Form.

Attachment Extension(s) specifies the types of files allowed as Attachments when creating or Approving Requests. To specify all file types, enter \*.\* into Include and select Include. If

Exclude is selected, at least one file type must be included in the list. Use the radio button to specify whether to use inclusions or exclusions.

Allow Sub-Workflow determines whether Sub-Workflows will be allowed in this Form. If yes is selected, then you can later define Sub-Workflows. You can change this selection at any time.

If Active is changed to No, then users can no longer access the Form. However, Administrators may still report previous request activity from the Form.

Going back to Figure 3.3, you may delete a Form by clicking the check box next to its name and then clicking the Delete button. If you wish to edit any information about an existing Form, click the Edit button. The screen shown in Figure 3.4 will appear but with the current information already available. Edit the information and then click the Save button.

## 2.1 Summary of Administrator Privileges:

The following chart shows the Privileges for each Administrator class. Those not related to managing Administrator classes refer to Service Catalog activities described later in this manual.

Privilege	System Administrator	Catalog Administrator	Task Administrator	User Administrator
Create, Deactivate and Delete Catalogs	Yes	No	No	No
Create, Deactivate and Delete Forms	Yes	Yes	No	No
Manage Form Fields	Yes	Yes	No	No
Archive Requests	Yes	Yes	Yes	No
Create rm <sup>s</sup> Users*	Yes	Yes	Yes	Yes
Create rm <sup>s</sup> Groups*	Yes	Yes	Yes	Yes
Create rm <sup>s</sup> Workers*	Yes	Yes	Yes	Yes
Import ADSI Users	Yes	No	No	No
Import ADSI Groups	Yes	No	No	No
Import ADSI Workers	Yes	No	No	No
Assign Users to More than one Catalog	Yes	Yes - For All Catalogs They Administer	No	No
Assign Groups to More than one Catalog	Yes	Yes - For All Catalogs They Administer	No	No
Assign Workers to More than one Catalog	Yes	No	No	No
User and Group Step Assignment	Yes	Yes	Yes	Yes
Teams	Yes	Yes	Yes	Yes
Workflow Exceptions	Yes	Yes	Yes	No
Request Manager	Yes	Yes	Yes	No
Manage System Administrators	Yes	No	No	No

Manage Catalog Administrators	Yes	Yes - For All Catalogs They Administer	No	No
Manage Task Administrators	Yes	Yes	No	No
Manage User Administrators	Yes	Yes	Yes	No
Form Templates	Yes	No	No	No
Field Type Templates	Yes	No	No	No
ADSI Server Configuration	Yes	No	No	No
Database and Tools	Yes	No	No	No
Database Backup and Migration Wizards	Yes	No	No	No
Server Time Zone	Yes	No	No	No
Welcome Text	Yes	No	No	No
Login as Another User	Yes	Yes - For All Catalogs They Administer	No	No
Request Dashboard	Yes	Yes - For All Catalogs They Administer	Yes - For All Catalogs They Administer	No
Request Manager	Yes	Yes - For All Catalogs They Administer	Yes - For All Catalogs They Administer	No

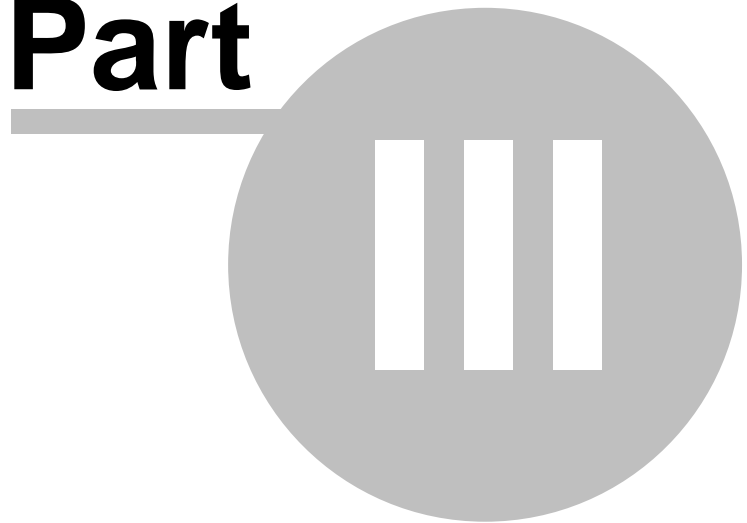
\*If a Catalog, Task or User Administrator adds an rm<sup>s</sup> User, Group or Worker, they are automatically assigned to the Catalog where they are an Administrator..



# Top Level Intro

This page is printed before a new  
top-level chapter starts

# Part



## 3 Service Catalogs and Forms

### Concepts:

Service Catalogs are the basic structural unit within rm<sup>s</sup>. Service Catalogs are a concept within Service Delivery Management (SDM). A Service Catalog presents users with the a menu of options for requesting and receiving services. For example: A Human Resources department may have a Service Catalog composed of three services, new hiring, employee review and vacation scheduling. Each has a unique set of information requirements and may share common processes. Similarly, an IT department may set up a Service Catalog for Web sites. Each Web site may have its own processes but all probably share processes to fulfill requests. A Catalog may represent a web site, an application, a process such as dispatching technicians to repair PCs. Forms represent the situations within the Catalog where users will submit requests such as "Application Enhancements," "Bugs," "Sales Leads" or "Building Maintenance – 100 Main Street."

Within a Service Catalog, the unit for submitting and managing Requests is a Form. Some Forms define inputs for Requests and a will have one or more Steps along which Requests move to completion. A Service Catalog may contain one or more Forms.

There are two types of Forms:

**Form** - Contains a Request Creation Form as the first workflow Step. This is the entry form for creating a Request.

**Common Form** - A Form that is shared by multiple Forms within a Catalog. Requests move from a Form into a Common Form and then may return to the Form or go to completion within the Common Form.

Any Form may have branches by creating Sub-Workflows. A **Sub-Workflow** is a set of alternative Steps that start and end at specific steps within a Form.

### Business Rules and Defaults:

You may define Service Catalogs up to the limit set by your rm<sup>s</sup> license.

Service Catalogs are independent of each other.

Each Service Catalog must have a unique name.

When a Catalog is defined, it is marked as active by default.

Catalogs may have any number of Forms and Common Forms up to the limit set by your rm<sup>s</sup> license.

A Form must be at least 1 Step long.

Common Forms are defined at the Service Catalog level.

Common Forms are available to all Forms within a Service Catalog.

Common Forms do not have Request Creation Steps.

A Form may have any number of Junctions with any number of Common Forms.



A Form may have one or more Sub-Workflows that allow for alternative processing of requests.

A Sub-Workflow is available only within its parent Form.

Sub-Workflows do not have Request Creation forms.

Deleting a Form deletes all Sub-Workflows belonging to that Form.

A Form may contain any number of branches created using Sub-Workflows.

Users submit Requests at the Form level.

A Request is completed when it is approved at the last available Workflow Step. The number of Steps to complete a Request may vary because it may follow a different path than another Request because of Sub-Workflows and Common Forms.

Users and Groups are assigned to Catalogs.

Users and Groups are assigned privileges at the Form level.

Catalog, Task and User Administrators exist at the Catalog level and can act across all Forms within a Catalog.

## Service Catalog Control: (System Administrators Only)

To add a Catalog, Click the Add button on the Service Catalog Manager page. This function is only available to System Administrators.

*Navigation: Configuration->Service Catalog Management*

**Figure 3.1 - Service Catalog Manager**

The screenshot displays the 'Service Catalog Manager' page within the 'The Request Management System'. The user is identified as 'Admin Demo (admindemo)'. A navigation menu on the right includes 'Home', 'Request Approval', 'Report Manager', 'Request Dashboard', 'Request Manager', and 'Configuration'. The main content area is titled 'Configuration' and shows the breadcrumb 'Configuration > Service Catalog Manager'. Below this is a 'Service Catalog Manager' section with a table of catalogs.

<input type="checkbox"/>	Name	Action
<input type="checkbox"/>	Beer Project Time Zone: 1 07:00 Bangkok, Hanoi, Jakarta	<a href="#">Edit Catalog</a> <a href="#">Form Management</a> <a href="#">Field Type Management</a> <a href="#">Step Assignment</a> <a href="#">Team Management</a> <a href="#">Support</a>
<input type="checkbox"/>	Demonstration Catalog Time Zone: 1 07:00 Bangkok, Hanoi, Jakarta	<a href="#">Edit Catalog</a> <a href="#">Form Management</a> <a href="#">Field Type Management</a> <a href="#">Step Assignment</a> <a href="#">Team Management</a> <a href="#">Support</a>
<input type="checkbox"/>	Son Catalog Time Zone: 1 00:00 Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London	<a href="#">Edit Catalog</a> <a href="#">Form Management</a> <a href="#">Field Type Management</a> <a href="#">Step Assignment</a> <a href="#">Team Management</a> <a href="#">Support</a>
<input type="checkbox"/>	Test Group Catalog Time Zone: 1 07:00 Bangkok, Hanoi, Jakarta	<a href="#">Edit Catalog</a> <a href="#">Form Management</a> <a href="#">Field Type Management</a> <a href="#">Step Assignment</a> <a href="#">Team Management</a> <a href="#">Support</a>

At the bottom of the table, there are buttons for 'Add', 'Delete', and 'Back'. The footer contains the copyright notice: '© 2002-2006 IT OnTime, Inc. All rights reserved. rm<sup>s</sup> is a trademark of IT OnTime, Inc.'

To delete a Catalog, select the Catalog by clicking on the check box next to the Service Catalog name. Click the Delete button. IT OnTime does not recommend deleting Catalogs as this loses all history associated with them. Instead, mark the Catalog as Inactivate. Click the Edit Catalog button and click the No radio button next to Active. See Figure 3.2 to see the Edit form. The Delete and Active functions are only available to System Administrators.

After clicking the Add button or clicking on the Edit button for an existing Catalog, rm<sup>s</sup> presents the following screen.

Navigation: Configuration->Service Catalogs and Forms->Service Catalog Management->Add

Navigation: Configuration->Service Catalogs and Forms->Service Catalog Management->Edit

Figure 3.2 - Service Catalog Manager Add/Edit

The screenshot shows the 'Service Catalog Edit' form within the 'The Request Management System' interface. The user is 'Admin Demo (admindemo)'. The breadcrumb trail is 'Configuration > Service Catalog Manager'. The form has the following fields:

Service Catalog Edit	
Name	<input type="text"/>
Time Zone	GMT 00:00 Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No

Buttons: Save, Cancel

Footer: © 2002-2006 IT OnTime, Inc. All rights reserved. rm<sup>s</sup> is a trademark of IT OnTime, Inc.

Name is the rm<sup>s</sup> display name for the Service Catalog.

Specification of time zone controls the time stamp on Approvals and emails. Having a common time zone avoids confusion when workers are in different time zones with different local computer times.

If Active is changed to No, then users can no longer access the Catalog. However, Administrators may still report on previous Request activity for the Catalog.

## Form Control: (System and Catalog Administrators Only)

Once you have created a Catalog, then you need to add Forms. Click on the Form Management button. rm<sup>s</sup> will display the following screen.

*Navigation: Configuration->Service Catalogs and Forms->Service Catalog Management->Form Management*

**Figure 3.3 - Form Manager**

The screenshot displays the 'Form Manager' interface. At the top, there is a header with the 'rm<sup>s</sup>' logo and the text 'The Request Management System'. Below the header, the user is identified as 'Admin Demo (admindemo)'. A navigation menu on the right includes 'Home', 'Request Approval', 'Report Manager', 'Request Dashboard', 'Request Manager', and 'Configuration'. The main content area is titled 'Configuration' and shows a breadcrumb trail: 'Configuration > Service Catalog Manager > Form Manager'. Below this, there is a 'Form Manager' icon and the text 'Form(s) for Beer Project'. A table lists the forms with columns for 'Name', 'Active', and 'Action'. The table contains five rows of form data. Below the table are buttons for 'Add', 'Delete', and 'Back'. At the bottom of the page, there is a copyright notice: '© 2002-2006 IT OnTime, Inc. All rights reserved. rm<sup>s</sup> is a trademark of IT OnTime, Inc.'

<input type="checkbox"/>	Name	Active	Action
<input type="checkbox"/>	common form 2 (Common Form)	Yes	Edit Form Workflow User Assignment Junction Form
<input type="checkbox"/>	common form1 (Common Form)	Yes	Edit Form Workflow User Assignment Junction Form
<input type="checkbox"/>	Form 1	Yes	Edit Form Workflow User Assignment Workflow Exceptions Junction Form
<input type="checkbox"/>	form 2	Yes	Edit Form Workflow User Assignment Workflow Exceptions Junction Form
<input type="checkbox"/>	manual form	Yes	Edit Form Workflow User Assignment Workflow Exceptions Junction Form

If this Catalog already contains Forms, the screen will list them. If there are no Forms, the list will be empty. To add a new Form, click the Add button. The following screen will display.

Navigation: Configuration->Service Catalogs and Forms->Service Catalog Management->Form Management->Add

Navigation: Configuration->Service Catalogs and Forms->Service Catalog Management->Form Management->Edit

**Figure 3.4 - Form Manager Add/Edit Form**

The screenshot shows the 'Add/Edit Form' configuration page in the Request Management System. The page has a header with the 'rm<sup>s</sup>' logo and the title 'The Request Management System'. Below the header, there is a navigation breadcrumb: 'Configuration > Service Catalog Manager > Form Manager'. The main content area is titled 'Add/Edit Form' and contains a form with the following fields:

Name	<input type="text"/>
Common Form	<input type="radio"/> Yes <input checked="" type="radio"/> No
Template Name	User Defined <input type="text"/>
Attachment Extension(s) (Example: *.zip, *.doc)	<input checked="" type="radio"/> Included <input type="text" value="*.doc,*.zip,*.rar"/> <input type="radio"/> Excluded <input type="text" value="*.asp"/>
Allow Sub-Workflow?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Active?	<input checked="" type="radio"/> Yes <input type="radio"/> No

At the bottom of the form are 'Save' and 'Cancel' buttons. The footer of the page contains the copyright notice: '© 2002-2006 IT OnTime, Inc. All rights reserved. rm<sup>s</sup> is a trademark of IT OnTime, Inc.'

Common Form defines whether or not this will be a sequence of Steps available to other Forms within the Catalog. An example of Common Form use is a programming group that services both enhancement requests and bugs. Bugs require different information than enhancement requests and most of the time flow through different reviewers. However, once they reach programming, they may be assigned to the same programmers for implementation. Use the radio button to make your selection.

Template Name allows you to start with a pre-defined template. The drop down lists all available templates. If you select User Defined, rm<sup>s</sup> will not load any predefined steps. If you choose a Template, you can edit the Workflow and the Request Creation Form as if you were defining your own form from scratch. IT OnTime supplies sample templates. Any rm<sup>s</sup> System Administrator can define additional templates.

Name is the screen name for this Form. It will be used throughout rm<sup>s</sup> to identify Requests created for this Form.

Attachment Extension(s) specifies the types of files allowed as Attachments when creating or Approving Requests. To specify all file types, enter \*.\* into Include and select Include. If

Exclude is selected, at least one file type must be included in the list. Use the radio button to specify whether to use inclusions or exclusions.

Allow Sub-Workflow determines whether Sub-Workflows will be allowed in this Form. If yes is selected, then you can later define Sub-Workflows. You can change this selection at any time.

If Active is changed to No, then users can no longer access the Form. However, Administrators may still report previous request activity from the Form.

Going back to Figure 3.3, you may delete a Form by clicking the check box next to its name and then clicking the Delete button. If you wish to edit any information about an existing Form, click the Edit button. The screen shown in Figure 3.4 will appear but with the current information already available. Edit the information and then click the Save button.

## 3.1 Workflow Examples

The following shows workflow three examples. The first is the simplest Form, a single Form without Sub-Workflows and Common Forms. In all examples, return loops and decision boxes are omitted for clarity. The second shows a simple branch structure with two implementation groups. The third shows an example of a Common Workflow. These are simple examples to illustrate workflows. You may combine Sub-Workflows and Common Forms to build very complex resulting process flows. Also, real Workflows have return paths not shown in these illustrations. While the tools for constructing Workflows within rm<sup>s</sup> are very simple, the possible results are quite complex.

Figure 3.5 - Simple Web Site Update Workflow

### Simple Workflow for Web Site Content Update

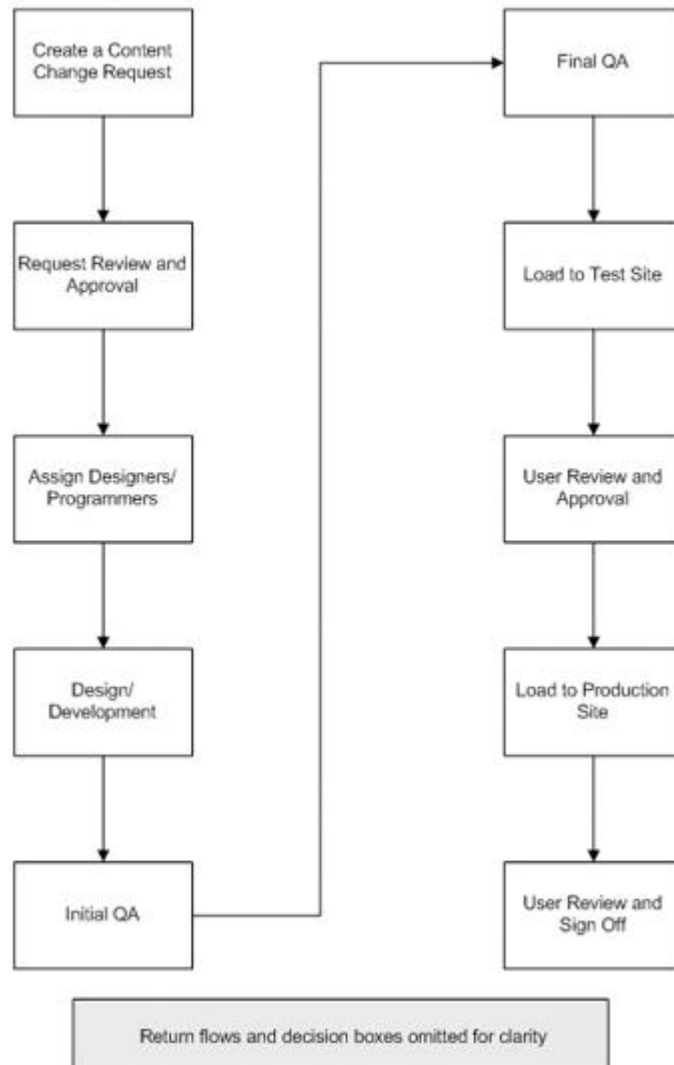
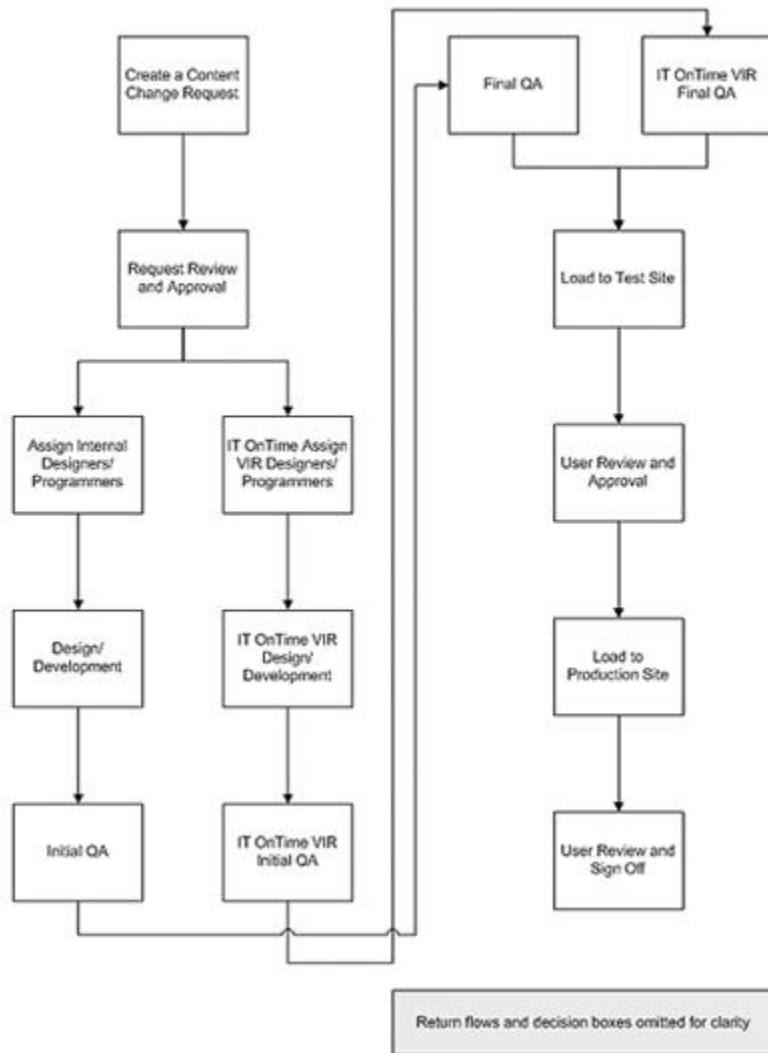


Figure 3.6 shows the same Workflow but with two different implementation groups, and internal group and an IT OnTime Virtual IT Resource (VIR.) Within *rm<sup>s</sup>*, you would implement the workflow shown in Figure 3.5 and then implement the additional Workflow as a Sub-workflow.

Figure 3.6 - Web Site Update Workflow with Alternate Implementation Groups

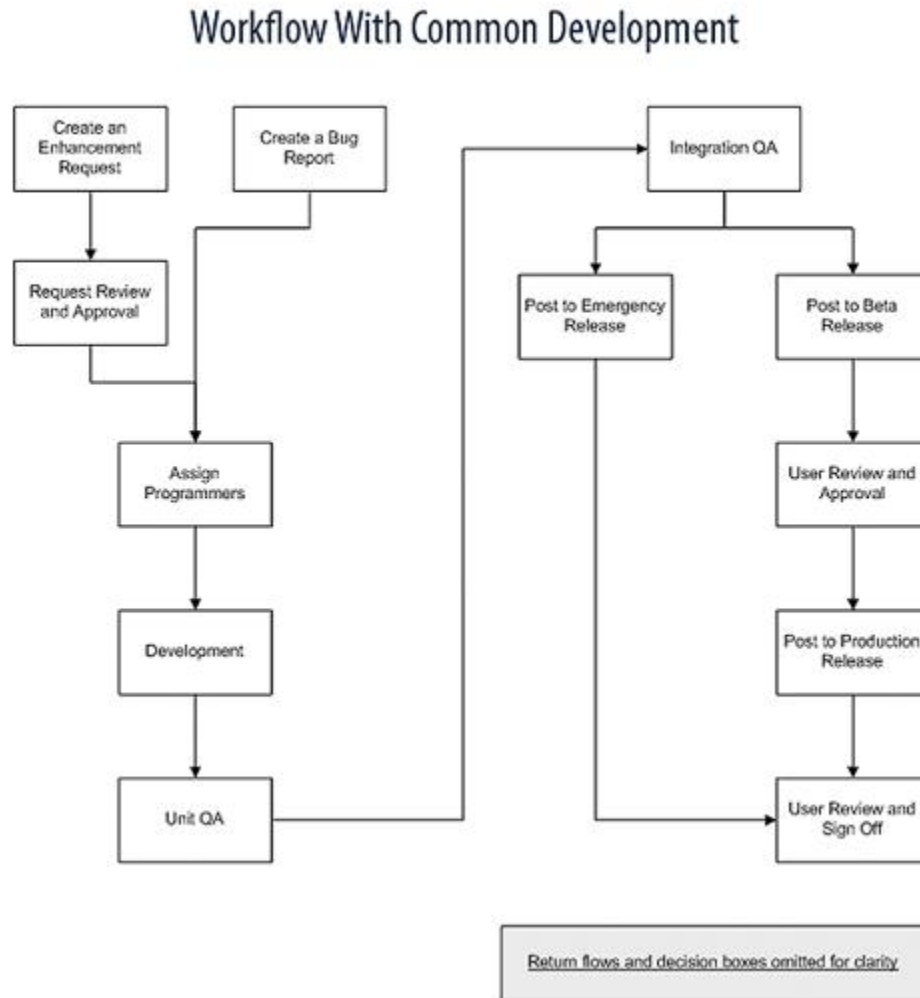
### Web Site Update With Two Implementation Groups



The last Workflow example shows a Common Workflow with a Branch. In this case, there are different Forms for Enhancement Requests and Bugs. Also, serious bugs would later branch around the normal release process for emergency release. This illustrates the potential complexity of Workflows within *rm<sup>s</sup>*. It is also important to note that bugs and enhancement requests need different forms as you may desire different information for each. We use this with *rm<sup>s</sup>* for *rm<sup>s</sup>* (yes, we use the product ourselves.) The form for *rm<sup>s</sup>* bugs is much simpler than the enhancement request form. See Figure 3.7 for this example.



Figure 3.7 - Common Development Workflow



## 3.2 Form Activities

Forms are made up of two parts, Request Creation Forms and Workflow Steps. This section of the manual describes in depth how to create both of these. It starts with the Request Creation form since this is the most visible part of any Form. Afterward, Workflow is discussed in depth.

Many of the advantages of *rm<sup>s</sup>* come from the unique design of the tools to build, maintain and modify Form components. All Form management activities use point-and-click tools. This minimizes the learning curve and makes it possible to have your installation up and running in days or weeks rather than months or years. All Requests automatically reflect all changes to Request Creation forms and Workflows without additional work on the part of *rm<sup>s</sup>* Administrators. *rm<sup>s</sup>* contains rules for dealing with changes so that Administrators will not have to rebuild the database or restate any history.

Please read this section of the manual carefully. If you can learn these tools, you will have mastered rm<sup>s</sup>.

### 3.2.1 Request Form Activities

A key to the flexibility of rm<sup>s</sup> is the ability to create custom entry forms for Requests. rm<sup>s</sup> contains nine pre-defined field types. Six are regular data types and three are data types that can be specialized by System or Catalog Administrators.

The first part of defining a new Catalog is defining its Forms. The first part of defining Forms are defining the Request Forms. Like all of rm<sup>s</sup>, you can later change Forms without having to restate data or shut down the system.

Request Creation Forms define the content of Requests. Each Form may have unique characteristics for Requests. These are customized to reflect the needs of people creating and fulfilling the requests. Most activities explained here will occur at the start of the rm<sup>s</sup> implementation project. However, you can change the Request Creation Form at any time. rm<sup>s</sup> self-heals when this is done. Any added fields are ignored in existing Requests until the Request is edited by an Administrator. If not edited, the Request continues to display as before. All new Requests will reflect changes made prior to their creation. The same is true when deleting fields.

#### 3.2.1.1 Form Field Concepts

##### Concepts:

*Form Fields* describe Requests. They are the components of Request Creation Forms. Specialized fields that are collections can appear on the Request Creation Form. They are Actions and Attachment(s). Actions are groups of an item name such as a file, a location such as a folder and one of the three predefined actions - Add, Replace, Remove. Attachment(s) allows users to include files with a Request. These may be drawings, files they want changed, content for a Web page or a Word document containing detailed instructions for the Request. This feature greatly expands the amount of material that may be included within a Request.

##### Business Rules and Defaults:

rm<sup>s</sup> Forms contain only four mandatory fields and three optional pre-defined fields.

The mandatory fields are:

1. The first field in the form has the default name of Subject and it is a Short Text (255 character) field. IT OnTime recommends using this field as a headline for the Request or a summary of the Request.
2. The second field is Priority. Since rm<sup>s</sup> is a Request Manager, request priority is a natural field. It is a radio button field seeded with four values. These values are changed in Field Type Templates discussed later. They may be redefined for any rm<sup>s</sup> Service Catalog. This field may also be renamed. However, it has the special attribute of being one of the five items that can create exceptions to normal workflows.
3. The third field is Creator Name. rm<sup>s</sup> maintains this field.
4. The fourth field is Last Update. This stores the date and time of Request Creation and the last change made to the Request using Edit in the Request Manager. rm<sup>s</sup> maintains this field.

The optional, pre-defined fields are:

1. Attachments - Allows attaching files to support the request.
2. Action(s) - Allows the specification of action triplets of the form NAME - LOCATION - ACTION. Name is a description of the item being acted upon. It can be a file, a part, document or any other item. Location is the a file path, URL, inventory bin or some other information to help locate the item. Action is one of ADD, REPLACE or REMOVE.
3. Request Type provides a special way to display radio buttons. It is a grid with the values Add, Change and Remove across the top. The rows of the grid are the names of items in Requests that may have one or more of the three actions performed on them. This will be discussed in more depth in the section titled Request Type.

You may add an unlimited number of fields beyond the seven pre-defined fields. The next section of the manual shows how to do this. You may define an unlimited number of fields for your request. Any of the fields that you define may be required or optional.

rm<sup>s</sup> supports the following data types.

Data Type	Description
Short Text	Up to 255 characters long and may contain any character
Short Text - Specify Email Format	Up to 255 characters long. It must contain at least one @ followed by a legal mail server domain name.
Long Text	An unlimited number of characters. Any HTML or XML tags are treated as text characters.
Number	Any legal number limited by the data storage for real numbers in your database management system.
Date	A data value of the form mm/dd/yyyy. If mm/dd/yy is specified by the User, rm <sup>s</sup> assumes that the value is between 1930 and 2029.
Radio Button	A radio button group that allows for mutually exclusive selection among options. The radio button values are defined using Manage Field Types for the Catalog.
Check Box	A check box group that allows for multiple selection of options. The check box values are defined using Manage Field Types for the Catalog.
Drop Down	A single select combo box. The drop down values are defined using Manage Field Types for the Catalog.

A System or Project Administrator must define the Field Type using the Field Type Manager before they are available for use in Form Fields.

The Secured storage type causes rm<sup>s</sup> to encrypt the field contents in the database and to display **\*\* Secured \*\*** for values of the field in emails. The Secured attribute cannot be changed after field creation.

By default, Request Type, Actions and Attachment(s) are not active for the Request Creation Form. You must explicitly make them active.

### 3.2.1.2 Adding and Editing Form Fields

#### Concepts:

A Request is described by a set of fields.

#### Business Rules and Defaults:

Seven default fields always appear in new forms. They are shown in Figure 3.8.

The minimum number of fields are the four fields predefined by rm<sup>s</sup> and always Active fields within rm<sup>s</sup>.

The maximum number is unlimited.

Any field may be required.

The Subject or name field of a Request is always required along with the Priority field even when they are renamed.

As previously described, Priority may be renamed and used for a different purpose than entry of the User's assumed priority for the Request.

If a field is required, rm<sup>s</sup> will check it to make sure it contains a value before Submitting the Request.

All required fields must be filled in before specifying Actions or Attachments.

Navigation: Configuration->Service Catalog Manager->Form Management->Workflow->Edit (Request Creation Step)

Figure 3.8 - Default Form Fields

The screenshot shows the 'Request Creation Form' configuration page in the Request Management System. The page title is 'Configuration' and the breadcrumb is 'Configuration > Service Catalog Manager > Form Manager > Workflow'. The form name is 'Enter Web Site Update Request'. Below this is a table titled 'Fields in the Form' with 11 rows. Each row contains a checkbox, a field number, the field name, the field type, the 'Active?' status, and an 'Edit' button. At the bottom of the table are 'Add', 'Remove', and 'Back' buttons.

<input type="checkbox"/>	#	Name	Type	Active?	Action
<input type="checkbox"/>	1	Subject	Short Text	Yes	Edit
<input type="checkbox"/>	2	Priority	Radio : Priority	Yes	Edit
<input type="checkbox"/>	3	Page URL	Short Text	Yes	Edit
<input type="checkbox"/>	4	Sug or Enhancement	CheckBox : Corrosion or flow?	Yes	Edit
<input type="checkbox"/>	5	Description	Long Text	Yes	Edit
<input type="checkbox"/>	6	Request Type	CheckBox Group	Yes	Edit
<input type="checkbox"/>	7	Date Wanted	Date	Yes	Edit
<input type="checkbox"/>	8	Action(s)	Action(s)	No	Edit
<input type="checkbox"/>	9	Attachment(s)	Attach File(s)	Yes	Edit
<input type="checkbox"/>	10	Creator Name	Short Text	Yes	Edit
<input type="checkbox"/>	11	Last Update	Date	Yes	Edit

Use the Field Type Manager described below to manage the radio button choices for the Priorities field. A System Administrator can change Priority in Field Type Templates to redefine the radio button choices. Any Catalog created after the change will use the new radio button choices. Existing Catalogs and Forms are unaffected.

Creator Name and Date are automatically managed by rms.

The other predefined fields are not active by default. Use the Edit Action button to make them active. You may also rename any predefined field.

### Adding and Editing Form Fields (System and Catalog Administrators Only)

To add Form fields, you must go to the Service Catalog and Form you where you wish to add or edit Form fields. The screen is shown in Figure 3.14. The following navigation

shows how to get there.

Click on Configuration on the following screen.

**Figure 3.9 - rm<sup>s</sup> Main screen**



Click on Service Catalogs and Forms under the heading Service Catalogs and Forms.

**Figure 3.10 - Configuration**

**Configuration**

**rm<sup>s</sup> System Configuration**

- Database and Tools
- ADSI Server Configuration
- Database Backup and Data Migration Wizards
- Server Time Zone
- Welcome Text

**Administrators**

- System Administrators
- Catalog, Task and User Administrators

**Service Catalogs and Forms**

- Service Catalog Manager
- Step Email On/Off
- Request Creator Email On/Off

**User Management**

- Update My Profile
- Users
- Groups
- Workers

**Templates**

- Form Templates
- Field Type Templates

**Change User Login to**

Select Catalog

Select Person

You will now see a list of Catalogs. If you have no Catalogs defined, define a new Service Catalog as previously described. If you wish to define a new Catalog, do so at this time. Click on Form Management for the Catalog of interest.

Figure 3.11 - Service Catalog Manager

The screenshot displays the 'Service Catalog Manager' interface. At the top, the system name 'The Request Management System' and user 'Admin Demo (admin@demo)' are visible. A navigation menu includes Home, Request Approval, Report Manager, Request Dashboard, Request Manager, and Configuration. The main content area is titled 'Configuration' and shows the path 'Configuration > Service Catalog Manager'. Below this is a table listing four catalogs:

<input type="checkbox"/>	Name	Action
<input checked="" type="checkbox"/>	Beer Project Time Zone: 1 07:00 Bangkok, Hanoi, Jakarta	<a href="#">Edit Catalog</a> <a href="#">Form Management</a> <a href="#">Field Type Management</a> <a href="#">Step Assignment</a> <a href="#">Team Management</a> <a href="#">Support</a>
<input type="checkbox"/>	Demonstration Catalog Time Zone: 1 07:00 Bangkok, Hanoi, Jakarta	<a href="#">Edit Catalog</a> <a href="#">Form Management</a> <a href="#">Field Type Management</a> <a href="#">Step Assignment</a> <a href="#">Team Management</a> <a href="#">Support</a>
<input checked="" type="checkbox"/>	Som Catalog Time Zone: 1 00:00 Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London	<a href="#">Edit Catalog</a> <a href="#">Form Management</a> <a href="#">Field Type Management</a> <a href="#">Step Assignment</a> <a href="#">Team Management</a> <a href="#">Support</a>
<input type="checkbox"/>	Test Group Catalog Time Zone: 1 07:00 Bangkok, Hanoi, Jakarta	<a href="#">Edit Catalog</a> <a href="#">Form Management</a> <a href="#">Field Type Management</a> <a href="#">Step Assignment</a> <a href="#">Team Management</a> <a href="#">Support</a>

At the bottom of the table are buttons for 'Add', 'Delete', and 'Back'. The footer contains the copyright notice: '© 2002-2006 IT OnTime, Inc. All rights reserved. rms is a trademark of IT OnTime, Inc.'

You will now see a list of Forms. If you have no Forms defined, define a new Form as previously described. If you have Forms defined, but want to create another one, create it at this point. Click on the Workflow button for the Form of interest.



Figure 3.12 - Form Manager

### Configuration

Configuration > Service Catalog Manager > Form Manager

**Form Manager**

---

**Form(s) for Beer Project**

	Name	Active	Action
<input type="checkbox"/>	common form 2 <span style="color: red;">(Common Form)</span>	Yes	<a href="#">Edit Form</a> <a href="#">Workflow</a> <a href="#">User Assignment</a> <a href="#">Junction Form</a>
<input type="checkbox"/>	common form1 <span style="color: red;">(Common Form)</span>	Yes	<a href="#">Edit Form</a> <a href="#">Workflow</a> <a href="#">User Assignment</a> <a href="#">Junction Form</a>
<input type="checkbox"/>	Form 1	Yes	<a href="#">Edit Form</a> <a href="#">Workflow</a> <a href="#">User Assignment</a> <a href="#">Workflow Exceptions</a> <a href="#">Junction Form</a>
<input type="checkbox"/>	form 2	Yes	<a href="#">Edit Form</a> <a href="#">Workflow</a> <a href="#">User Assignment</a> <a href="#">Workflow Exceptions</a> <a href="#">Junction Form</a>
<input type="checkbox"/>	IT OnTime Virtual IT Resource (VIR.)	Yes	<a href="#">Edit Form</a> <a href="#">Workflow</a> <a href="#">User Assignment</a> <a href="#">Workflow Exceptions</a> <a href="#">Junction Form</a>
<input type="checkbox"/>	manual form	Yes	<a href="#">Edit Form</a> <a href="#">Workflow</a> <a href="#">User Assignment</a> <a href="#">Workflow Exceptions</a> <a href="#">Junction Form</a>

You will see a list of Steps for this Form. If it is a new Form specified with User Defined as the Template, the Workflow will contain one Step named Request Create. This is the default name for this step. You can change it later. If this is an existing Form or a Form based on a Template, you will see Request Create or the custom name for the Step and any number of additional Steps below it. In this section, the focus is on the first Step in the workflow. The next section of this document, Workflow Activities, will discuss managing subsequent workflow Steps.

Figure 3.13 - New Workflow - User Defined

The screenshot shows the 'Configuration' page for 'Workflow' in the Request Management System. The breadcrumb trail is 'Configuration > Service Catalog Manager > Form Manager > Workflow'. A navigation menu on the right includes 'Home', 'Request Approval', 'Report Manager', 'Request Dashboard', 'Request Manager', and 'Configuration'. The main content area is titled 'Workflow' and contains two tables.

**Workflow for Workflow**

Step #	Step Name	Return Step	Action
-	Request Create		Edit

Below the table is an 'Add' button.

**Sub-Workflow for Workflow**

Name	Begin Step	End Step	Action	Action
------	------------	----------	--------	--------

Below the table are 'Add' and 'Back' buttons.

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Click on the Edit button in the Action column to work on the initial Workflow Step indicated by a dash (-) in the Step Number column. You will see a screen similar to the following screen.

Navigation: Configuration->Service Catalog Management->Form Management->Workflow->Edit (Request Creation Step)

Figure 3.14 - Request Create - Default Request Create Form for New Form

## Configuration

Configuration > Service Catalog Manager > Form Manager > Workflow

 Request Creation Form

---

**Workflow for Form1**

Name	Request Create	<a href="#">Edit</a>	<a href="#">Preview</a>
------	----------------	----------------------	-------------------------

**Fields in the Form**

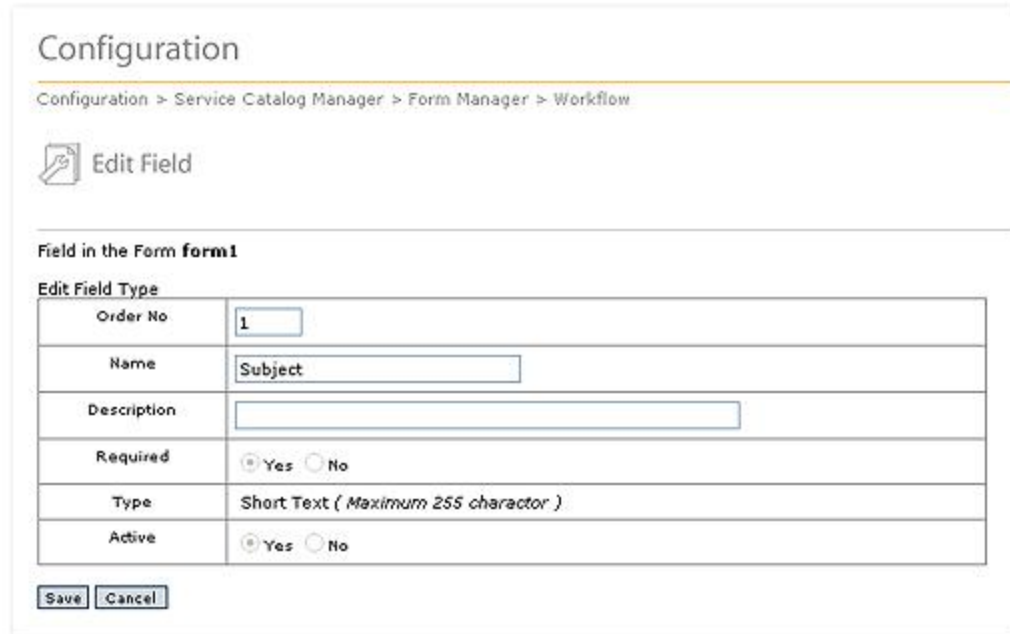
<input type="checkbox"/>	#	Name	Type	Active?	Action
<input type="checkbox"/>	1	Subject	Short Text	Yes	<a href="#">Edit</a>
<input type="checkbox"/>	2	Priority	Radio : Priority	Yes	<a href="#">Edit</a>
<input type="checkbox"/>	3	Creator Name	Short Text	Yes	<a href="#">Edit</a>
<input type="checkbox"/>	4	Last Update	Date	Yes	<a href="#">Edit</a>
<input type="checkbox"/>	5	Request Type	CheckBox Group	No	<a href="#">Edit</a>
<input type="checkbox"/>	6	Action(s)	Action(s)	No	<a href="#">Edit</a>
<input type="checkbox"/>	7	Attachment(s)	Attach File(s)	No	<a href="#">Edit</a>

[Add](#) [Back](#)

The mechanics for adding and editing fields are simple. If you want to change any attributes of any existing field, click the Edit button in the last column (Action Column) of the form. A Field edit form will open. Make the changes and click Save. Figure 3.15 shows an example of this.

Navigation: Configuration->Service Catalog Management->Form Management->Workflow->Edit->Edit (Any Field)

Figure 3.15 - Edit Field in the Form



The screenshot displays a web interface for editing a field. At the top, the title is 'Configuration' with a breadcrumb trail: 'Configuration > Service Catalog Manager > Form Manager > Workflow'. Below this is a section titled 'Edit Field' with a pencil icon. The main content area is titled 'Field in the Form form1' and contains an 'Edit Field Type' form. This form has several rows with labels and input fields:

Order No	<input type="text" value="1"/>
Name	<input type="text" value="Subject"/>
Description	<input type="text"/>
Required	<input checked="" type="radio"/> Yes <input type="radio"/> No
Type	Short Text ( Maximum 255 character )
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No

At the bottom of the form are two buttons: 'Save' and 'Cancel'.


Adding a Field is just as easy. Click the Add button under the list of Fields in the Form. The Field in the Form screen will now display as shown in Figure 3.16.

Navigation: Configuration->Service Catalog Management->Form Management->Workflow->Edit (Request Creation Step)->Add

Figure 3.16 - Add Field to the Form

## Configuration

Configuration > Service Catalog Manager > Form Manager > Workflow

 Add/Edit Field

**Field in the Form form1**

**Edit Field Type**

Order No	<input type="text" value="12"/>
Name	<input type="text"/>
Description	<input type="text"/>
Secured	<input type="radio"/> Yes <input checked="" type="radio"/> No
Required	<input checked="" type="radio"/> Yes <input type="radio"/> No
Type	<input type="radio"/> Short Text ( Maximum 255 character ) <input type="checkbox"/> Specify Email format. <input type="radio"/> Long Text ( No character limit ) <input type="radio"/> Number <input type="radio"/> Date <input type="radio"/> Radio <input type="text" value="Select Radio Group"/> <input type="radio"/> CheckBox <input type="text" value="Select CheckBox Group"/> <input type="radio"/> ComboBox <input type="text" value="Select ComboBox Group"/>
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No

Fill in the fields on the screen and click Save.

This will add the new field in rank order as specified in Order No. By default, the order number presented will place the new Field at the bottom of the Form. If you would like it placed in a different location, specify that position. All fields will automatically be moved down to make room for any new field.

Name is the display name for the field.

Description appears at the bottom of the input area on the Request Creation Form.

Secured - Secured fields are encrypted in the database and emails display \*\* Secured \*\* for their values. Once selected, the value of Secured cannot be changed. When Editing fields, the radio button will be grayed out. The seven default fields do not support Secured. As you

can see, Figure 3.13 does not show a Secured radio button since the example is editing one of the default fields.

Required fields must be filled in by users before Submitting their request, specifying Actions or adding Attachments. If Actions or Attachments is Required, the user cannot Submit the Request before specifying an Action or Attachment.

Type is discussed in the previous section - Form Field Concepts.

Active says whether or not the field is currently in use. IT OnTime recommends deactivating a field instead of deleting it.

### **Request Types: (System and Catalog Administrators Only)**

As previously discussed, Request Types are a specialized class of check box fields. Not only can you have different instances of Request Type, but each instance can have up to three pre-defined values - Add, Change, Remove. This allows the user to categorize what they believe they are asking for in the Request. Figure 3.17 shows an example of Request Types. Note that a Request Type need not have all three values available.

Navigation: Configuration->Service Catalog Manager->Form Management->Workflow  
->Edit (Request Creation Step)->Edit (Request Type field)

Figure 3.17 - Request Types.

## Configuration

Configuration > Service Catalog Manager > Form Manager > Workflow

Edit Request Type Field

---

**Request Type in the Form form1**

Order No	6
Name	Request Type
Description	
Required	<input type="radio"/> Yes <input checked="" type="radio"/> No
Type	CheckBox Group
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No

[Edit](#)

**Request Type**

<input type="checkbox"/>	#	Name	Type	Active	Action
<input type="checkbox"/>	1	Content	<ul style="list-style-type: none"> <li>● Add</li> <li>● Change</li> <li>● Remove</li> </ul>	Yes	<a href="#">Edit</a>
<input type="checkbox"/>	2	Menu	<ul style="list-style-type: none"> <li>● Add</li> <li>● Change</li> <li>● Remove</li> </ul>	Yes	<a href="#">Edit</a>
<input type="checkbox"/>	3	Graphic	<ul style="list-style-type: none"> <li>● Add</li> <li>● Change</li> <li>● Remove</li> </ul>	Yes	<a href="#">Edit</a>
<input type="checkbox"/>	4	Hyperlinked File	<ul style="list-style-type: none"> <li>● Add</li> <li>● Change</li> <li>● Remove</li> </ul>	Yes	<a href="#">Edit</a>
<input type="checkbox"/>	5	External Hyperlink	<ul style="list-style-type: none"> <li>● Add</li> <li>● Change</li> <li>● Remove</li> </ul>	Yes	<a href="#">Edit</a>

[Add](#) [Delete](#) [Back](#)

# determines the display order of *Request Types* in the Request Creation form. If the same number is duplicated, the most recently created *Request Type* with that order number retains the order number. All entries starting with the duplicated number are moved down.

You can edit a Request Type by clicking the Edit button in the Action column. You can add a Request Type by clicking the Add button below the table of Request Type items. This will open the screen in Figure 3.18.

*Navigation: Configuration->Service Catalog Manager->Form Management->Workflow  
->Edit (Request Creation Step)->Edit (Request Type field)->Edit (Request Type Item)  
Navigation: Configuration->Service Catalog Manager->Form Management->Workflow  
->Edit (Request Creation Step)->Edit (Request Type field)->Add (Request Type Item)*

**Figure 3.18 - Add/Edit a Request Type Item**

Request Type Item	
Order No	<input type="text" value="6"/>
Name	<input type="text"/>
Type	<input type="checkbox"/> Add <input type="checkbox"/> Change <input type="checkbox"/> Remove
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No

Save Cancel

The Name is the text that Users will see on the Request Creation form. It can be as brief or as long as required for clarity to a maximum of 150 characters. Experience shows that *Request Types* requiring long explanations are too confusing for most users. If the text will not fit, try to rethink the *Request Type*.

Type determines which check boxes will be available for the *Request Type*. For most, all three apply. However, common *Request Types* such as Program Bug only have one applicable action, Remove.

If Active is Yes, then users will see and can use the *Request Type*. If Active is No, then users will not see the *Request Type* for Request Creation. However, rm<sup>s</sup> will retain historical date for the *Request Type*.

If Request Type is required, users must check at least one check box. They do not have to make a selection in each row.

Add a Request Type by clicking the Add button at the bottom of the screen. Fill in the items



as explained above and click the Save button.

Request Type cannot be an active field, without at least one Request Type defined.

When only one Request Type exists, you may not wish to use Request Types but use a check box Field Type instead.

### 3.2.1.3 Field Type Manager

#### Concepts:

Field Types are the selectable values for radio buttons, check boxes and dropdown lists. The Field Type Manager allows you to define fields of these three types and enter the selection values.

#### Business Rules and Defaults:

Field Types are defined for Service Catalogs.

Field Types can be defined as Field Type Templates by the System Administrator for each *rm<sup>s</sup>* instance.

The Priority type is a predefined Field Type. As discussed previously, Request Type is a specialization of the Field Type Check Box.

Priority may be renamed. *rm<sup>s</sup>* will automatically use the field with its new name.

You may define as many Field Types as required for all the Forms in your Service Catalog. Field Types may be used in multiple Forms.

#### Defining Field Types: (System and Catalog Administrators Only)

To access Field Types, click the Manage Field Types button for the desired Catalog on the Service Catalog Manager screen. A form similar to the one shown in Figure 3.19 will open. It will display the currently defined Field Types for the Catalog.

Navigation: Configuration->Service Catalog Manager->Field Type Management

Figure 3.19 - Field Type Manager

The screenshot displays the 'Field Type Manager' interface. At the top, there is a navigation menu with options: Home, Request Approval, Report Manager, Request Dashboard, Request Manager, and Configuration. The main content area is titled 'Configuration' and includes a breadcrumb trail: Configuration > Field Type Manager > Field Item Manager. Below this, there is a section for 'Field Type Templates' and a 'Field Type Manager (Priority)' section. The 'Field Item Manager' section contains a table with the following data:

<input type="checkbox"/>	Order No	Name	Active	Action
<input type="checkbox"/>	1	Low	Yes	<a href="#">Edit</a>
<input type="checkbox"/>	2	Normal	Yes	<a href="#">Edit</a>
<input type="checkbox"/>	3	High	Yes	<a href="#">Edit</a>
<input type="checkbox"/>	4	Urgent	Yes	<a href="#">Edit</a>

Below the table are buttons for 'Add', 'Delete', and 'Back'. At the bottom of the page, there is a copyright notice: © 2002-2006 IT OnTime, Inc. All rights reserved. im is a trademark of IT OnTime, Inc.

To add a new Field Type, click the Add button.

To delete a Field Type, click the check box to the left of the Field Type you want to delete. Click the Delete button. IT OnTime does not recommend deleting Field Types except when doing initial Service Catalog set up. Instead, click Edit and mark the Field Type as Inactive.

Figure 3.20 shows the screen for adding and editing Field Types.

Navigation: Configuration->Service Catalog Manager->Field Type Management->Edit  
 Navigation: Configuration->Service Catalog Manager->Field Type Management->Add

**Figure 3.20 - Add/Edit Field Types**

Configuration

Configuration > Service Catalog Manager > Field Type Manager > Choice

Add/Edit Field Type

**Field Type for Project 1**

**Edit Field Type**

Name	<input type="text"/>
Type	<input checked="" type="radio"/> Radio <input type="radio"/> Check Box <input type="radio"/> Combo Box
Active	<input type="radio"/> Yes <input checked="" type="radio"/> No

Enter a name for your Field Type. This is not the Field name but a descriptive name for the contents of fields of this type.

There are three Field Types as discussed previously

1. Radio button - Mutually exclusive selections for small groups of choices.
2. Check boxes - For multiple selections
3. Combo Box - For a single selection from a list

Pick the type that best suits your need and then click Save. By default, new Field Types are inactive. If you are editing a Field Type and wish to activate it, select Yes for Active and then click the Save button. To activate a Field Type, it must have at least one active item. If you deactivate a Field Type, you will no longer be able to specify it when defining a new Form Field. Any field using the Field type on existing Request Creation Forms will also become inactive.


After defining the Field Type, you are now ready to define its values. Click the Items button under Actions on the line containing the name of the Field Type. In Figure 3.21, you will see this screen with the as-shipped values of Priority.

Navigation: Configuration->Field Type Management->Field Items Manager (Priority)

Figure 3.21 - As-Shipped Priority Items

## Configuration

Configuration > Service Catalog Manager > Field Type Manager > Field Item Manager

 Manage Field Type Item(s)

### Field Type for Project 1 (Priority)

#### Field Item Manager

<input type="checkbox"/>	Order No	Name	Active	Action
<input type="checkbox"/>	1	Low	Yes	<input type="button" value="Edit"/>
<input type="checkbox"/>	2	Normal	Yes	<input type="button" value="Edit"/>
<input type="checkbox"/>	3	High	Yes	<input type="button" value="Edit"/>
<input type="checkbox"/>	4	Urgent	Yes	<input type="button" value="Edit"/>

To Add a new item for this Field Type, click the Add Button. The screen in Figure 3.22 will now display. To change an existing item, click the Edit button in the Action column.

Navigation: Configuration->Service Catalog Manager->Field Type Management->Items->Add

Navigation: Configuration->Service Catalog Manager->Field Type Management->Items->Edit

Figure 3.22 Add/Edit Field Type Item

### Edit Field Item

Order No	6
Name	

If you are editing a Field Type item, the display will contain the existing values. Name is the value users will see for this item. Order No is the order in which this item will display. When

you are done, click the Save button.

When you add the first active item to a Field Type, you will be prompted to confirm making the Field Type active.

When you delete the last active item or make the last active item for a Field Type Inactive, you will be warned that the Field Type will now become inactive.

## 3.2.2 Workflow Activities

Workflow is the heart of rm<sup>s</sup>. It contains two elements; Steps and workflow.

Steps are the points in the process where someone works on the request. That activity may be a review and approval, programming, repair, fulfillment or quality assurance activities. The Step is the place for reporting the result of that activity and not the activity itself. Workflow is the order in which steps are performed. There is a normal Workflow for a Form and there may be Workflow Exceptions. As shown in [Workflow Examples](#), workflows may be linear, have branches or share common steps.

Workflow Exceptions define steps that are skipped based upon the conditions of the exception. Workflow Exceptions are allowed for Request Type, Priority, Users, Groups and Teams. Multiple Workflow Exceptions can exist. In cases where more than one Workflow Exception applies, every step excluded by any Exception is excluded in the combined exception workflow.

The logical definition of the workflow is generally the most difficult part of implementing rm<sup>s</sup>. If the Request process is mostly ad-hoc, then this will be the first attempt at its codification. This is a difficult activity and will require time and input from many people within your organization. If you need assistance, IT OnTime can provide consulting services to help you.

### 3.2.2.1 Steps

#### Definitions:

Step properties – The options that define allowable User operations at each Step.

#### Concepts:

A Step is an explicit stage through which a Request passes as it is being fulfilled. Requests pass through a sequence of Steps until they are completed or canceled. Users or Groups are assigned to each step and represent those parties who can service or view requests at that step. Step properties are specified by a System Administrator or a Catalog Administrator. User actions are limited to the properties defined for that step.

#### Business Rules and Defaults: (System and Catalog Administrators Only)

A Form can have any number of Steps.

At least two Steps are required for the Form to be meaningful – a step to define Requests and a Step to fulfill Requests.

In general, the Steps will include administrator reviews, fulfillment, quality assurance and user delivery and acceptance. Your business needs will dictate the Steps that you define in rm<sup>s</sup>.

The initial Step is always created when you build your Request Creation Form. If you do not use a Form Template, only this Step will exist.

You may initialize a Form with a Template. The Form Template will provide the initial set of Steps and Step properties for the new Form. IT OnTime ships several Templates with rm<sup>s</sup> and these are discussed in the [Templates](#) section later in this manual.

## Adding and Editing Steps

To build your workflow, go to Manage Forms under Configuration, Service Catalogs and Forms. In the Actions column on the row containing your Form name, click the Workflow button. If you read the chapter [Adding and Editing Form Fields](#), you will have already navigated to this screen. Figure 3.23 shows this screen with only the Request Create Step. If you are not using a template, your screen will look like this one.

*Navigation: Configuration->Service Catalog Manager->Form Management->Workflow (Any Form)*

**Figure 3.23 - Workflow without Template Steps Added**

The screenshot shows the 'Configuration' page for the 'Workflow' of a form. The breadcrumb trail is 'Configuration > Service Catalog Manager > Form Manager > Workflow'. The page title is 'Workflow'. Below the title is a table titled 'Workflow for Workflow' with the following data:

Step #	Step Name	Return Step	Action
1	Request Create		Edit

Below the table is an 'Add' button. There is also a 'Sub-Workflow for Workflow' section with an 'Add' button and a 'Back' button. The footer contains the text: '© 2002-2006 IT OnTime, Inc. All rights reserved. rm<sup>s</sup> is a trademark of IT OnTime, Inc.'

To begin adding steps beyond Request Create, click the Add button. The screen shown in Figure 3.24 will now open.

Navigation: Configuration->Service Catalog Manager->Form Management->Workflow  
->Add

Figure 3.24 - Step Definition Screen.

## Configuration

Configuration > Service Catalog Manager > Form Manager > Workflow (Add/Edit)



### Workflow for IT OnTime

Name	<input type="text"/>
Property	<input checked="" type="checkbox"/> Approve Request <input type="checkbox"/> Cancel Request <input type="checkbox"/> Comment Request <input type="checkbox"/> Assign User(s) for the Next Step <input type="checkbox"/> Specify Action(s) <input type="checkbox"/> Allow Attachment(s) <input type="checkbox"/> Creator or Administrator Review <input type="checkbox"/> Record Users Who Receive Email <input type="checkbox"/> Time Tracking <input type="checkbox"/> Trigger Reminder Remind after <input type="text" value="3"/> day(s) Interval Period <input type="radio"/> Remind one time <input type="radio"/> Interval every <input type="text" value="1"/> day(s)
Return Step	-- No Return Step --

Steps may have up to 9 attributes. All steps must have the Approve Request attribute. This is required since by design, requests move from Request Creation to end of the workflow.

The following explain the remaining selections.

**Cancel Request** – Allows the User reviewing the Request to cancel it. Once canceled, the Request can no longer be processed. The User must have Cancel permission at the Step to cancel the Request.

Cancel Request

**Comment Request** – Allows the User reviewing the Request to add comments regarding the Request or the actions taken in fulfilling the Request.

Comment Request

**Assign User(s) For the Next Step** – Presents a list of Users assigned to the next step who are eligible to work on the Request. It requires the User reviewing the Request to assign the Request to specific individual(s) from this list. E-mail notification will be limited to the list of selected users. Anyone assigned to that Step may process the Request. This is by design in case of vacations or other circumstances where the selected individual(s) cannot Review the Request and Approve or Return it. At least one User must be selected. This property is often used by supervisors to assign work based on skill level of an individual. If the next Step in the workflow has the Creator or System Admin Review attribute, rm<sup>s</sup> will ignore Assign User(s).

Assign User(s) for the Next Step

**Specify Actions** – Allows users to specify Actions. These are identical to those in the Request Creation form described previously. This information will aid in implementing the request or explaining what was done in fulfilling the Request.

Specify Action(s)

**Allow Attachments** – Allows Users to attach files for subsequent reference and use. Allowable file types are restricted at the Form level as discussed in [Adding and Editing Form Fields](#).

Upload Files

**Creator or Administrator Review** – Limits e-mail concerning the Requests moving into the step to the Request Creator/owner and System, Catalog and Task Administrators. Only the Request Creator or an Administrator (except User Administrators) can Review the Request. Others assigned at the Step can View the Request but not Approve it.

Creator or System Admin Review

The preceding step attribute generates no distinctive input area.

**Record Users Who Receive Email** – Creates a record of emails that rm<sup>s</sup> sends out when the Request is approved. Useful for seeing who is notified by approval of the step especially when using Teams, Groups, Assign Users and Creator or System Admin Review.

Record Users Who Receive Email

The preceding step attribute generates no distinctive input area. However, each approved step will contain a list of users. The list contains active mailto links.

**Time Tracking** – Enables collection of time worked on fulfilling the Request for this Step. Adds a button labeled Time Tracking for Step Approval.

Time Tracking

**Trigger Reminder** – Enables re-notification of the Users who received emails the last time a Request is Approved. There are two controls - **Remind After** - This is the number of days between the initial Request Approval and the first reminder email. **Interval Period** - Controls the frequency at which additional reminders after the first reminder are sent. Selecting Remind One Time provides only one reminder. Selecting Interval Every  Days provides for specifying a stream of reminders on every x days after the initial reminder.



These reminders continue until the Request is Approved to the next step, Completed or Canceled.

Trigger Reminder  
 Remind after  day(s)  
 Interval Period  
 Remind one time  
 Interval every  day(s)

The last item, **Return Step**, has a drop down list of all Steps in the Form. If you want the Request reviewer to be able to reject the Request and return it for additional work, select the correct Step from the list. This will generate an additional radio button that the User reviewing the Request may select. If selected, the Request goes to that step rather than to the next Step in the workflow. Steps for reviewing designs or programming results generally have Return Steps so that an incomplete or incorrect Request can be returned for more work.

Return Step

### 3.2.2.2 Workflow

#### Definitions:

Return Step – A Step in the workflow to route Requests flagged as "returned" by a user.  
 Sub-Workflows - Branches that may exist for alternative processing of requests. A Sub-Workflow has no Request Creation Form.  
 Common Forms - A Form shared by multiple Forms. A Common Form has no Request Creation Form.

#### Concepts:

Workflow refers to the step-by-step progression of a request.

Requests progress from Step to Step until they are completed or canceled.

Normally, requests flow from a given Step to the next sequential Step in the workflow. This is initiated by a User Approving the Request.

If the User Returns the request, it flows to the Return Step defined in the workflow.

Branches are points where the workflow diverges into one or more Sub-Workflows or Common Forms.

The main Workflow continues but some Requests may move along the Sub-Workflow.

Common Workflows are workflows for shared resources working on Requests from multiple Forms within a Catalog.

#### Business Rules and Defaults:

Request Approval results in the Request moving to the next step in the Workflow. This may be the next sequential step in the Workflow, a Sub-workflow Step at a Branch, a Common Workflow Step or a Step determined by Conditional Workflows.

A step can optionally have a Return Step. If a Request is returned by the User, it is returned to the Return Step specified in the Workflow. If the Return Step was skipped due to a Conditional Workflow, the request will be returned to the last Step the request passed through prior to the skipped Step. Multiple Steps can specify the same Return Step. To prevent a loop, a request cannot be returned to the step where it is currently residing. The system allows returning a Request to a later step in the workflow but will still use text indicating Return in this case.

If a Request is Canceled, it is removed from further workflow processing. The owner may cancel the Request in the initial workflow Step if it is returned back from a later Step. The Request can be canceled at some later Step. In this case, email is generated to the Request Creator and Administrators (except User Administrators) to notify them of cancellation of the Request. The request can be reported as canceled. It is recommended practice to supply a reason for cancellation via a Comment (see [Steps](#) section).

### Workflow Control: (System and Catalog Administrators Only)

Workflow is constructed dynamically in the workflow screen. By default, the newly defined Step is the last workflow Step.

*Navigation: Configuration->Service Catalog Manager->Form Management->Workflow*

**Figure 3.25 - Workflow Screen**

**Workflow for Web Site Project**

Step #	Step Name	Return Step	Action
-	Create a Request		Edit
1	IT OnTime Review	Create a Request	Edit
2	Assign Programmers	IT OnTime Review	Edit
3	Design and Development	Assign Programmers	Edit
4	Development QA	Design and Development	Edit
5	User Review	Assign Programmers	Edit
6	Client Review	IT OnTime Review	Edit

You may reorder the forward Workflow by clicking the Step Sequence button. Figure 3.26 shows this form.

Navigation: Configuration->Service Catalog Manager->Form Management->Workflow  
->Step Sequence

Figure 3.26 - Step Sequence

#	Current Step Sequence	New Step Sequence
1	IT OnTime Review	IT OnTime Review
2	Assign Programmers	Assign Programmers
3	Design and Development	Design and Development
4	Development QA	Development QA
5	User Review	User Review
6	Client Review	Client Review

Save Cancel

Use the drop downs to select the Step sequence. When you click the Save button, rms will check for duplicates. Return Steps shown in the screen are defined as previously described when creating a Step. See Figure 3.27 for an example.

Navigation: Configuration->Service Catalog Manager->Form Management->Workflow->Add

Figure 3.27 - Step Definition Screen

## Configuration

Configuration > Service Catalog Manager > Form Manager > Workflow (Add/Edit)



### Workflow for IT OnTime

Name	<input type="text"/>
Property	<input checked="" type="checkbox"/> Approve Request <input type="checkbox"/> Cancel Request <input type="checkbox"/> Comment Request <input type="checkbox"/> Assign User(s) for the Next Step <input type="checkbox"/> Specify Action(s) <input type="checkbox"/> Allow Attachment(s) <input type="checkbox"/> Creator or Administrator Review <input type="checkbox"/> Record Users Who Receive Email <input type="checkbox"/> Time Tracking <input type="checkbox"/> Trigger Reminder Remind after <input type="text" value="3"/> day(s) Interval Period <input type="radio"/> Remind one time <input type="radio"/> Interval every <input type="text" value="1"/> day(s)
Return Step	-- No Return Step --

This completes simple Workflows. The following sections describe how to build more complex workflows. IT OnTime recommends that you start with a simple Workflow. As you see the need for more workflow complexity, add it. rm<sup>s</sup> will continue to function and all Requests currently in process will be unaffected by the workflow changes. This means that you will not lose any work by developing your workflow in this way.

### 3.2.2.3 Sub-Workflows

#### Definitions:

Sub-Workflows - Branches that may exist for alternative processing of Requests.

#### Concepts:

Branches are points where the workflow diverges into one or more Sub-Workflows.

The main Workflow continues but some Requests may move along the Sub-workflow.

### **Business Rules and Defaults:**

A Sub-workflow is a sequence of Steps that branch out from the main workflow.

Sub-Workflows do not start with a Request Creation Step.

A Sub-Workflow does not need to return to the main Workflow when work on the request is completed.

Steps in a Sub-Workflow are defined as previously described in [Steps](#).

The Workflow for the Sub-Workflow is defined as described in [Workflow](#).

The relationship of the Sub-Workflow to the main Workflow is described as a Step where the Branch occurs when defining the Sub-Workflow.

Any main or Common Workflow may have any number of Sub-Workflows.

If the Request is in a Sub-Workflow, it can be returned to a Step within or outside of that Sub-Workflow. An asterisk (\*) precedes the Step name for all main workflow steps when selecting the return Step in a Sub-Workflow.

### **Sub-Workflow Control: (System and Catalog Administrators Only)**

To enable Sub-Workflows for a Form, click Yes on the Allow Sub-Workflows radio button. You can find this on the form for defining and editing Forms under Configuration > Service Catalogs and Forms. If you click the Add button, it appears on the screen for adding a new Form. If you click the Edit button, it appears on the screen for editing a Form.


Navigation: Configuration->Service Catalog Manager->Form Management  
->Workflow->Edit

Navigation: Configuration->Service Catalog Manager->Form Management  
->Workflow->Add

**Figure 3.28 - Allow Sub-Workflows?**

## Configuration

Configuration > Service Catalog Manager > Form Manager

 Add/Edit Form

---

**Edit Form**

Name	<input type="text" value="Demo Form"/>
Attachment Extension(s) (Example: *.zip, *.doc)	<input checked="" type="radio"/> Included <input type="text" value="*.doc,*.zip,*.rar"/> <input type="radio"/> Excluded <input type="text" value="*.asp"/>
Allow Sub-Workflow?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Active?	<input checked="" type="radio"/> Yes <input type="radio"/> No


Once you allow Sub-Workflows, click on the Workflow button for that Form. You will see the main Workflow as before. However, below the main Workflow, the form will contain an area labeled Sub-Workflow for "Your Workflow Name"

Navigation: Configuration->Service Catalog Manager->Form Management  
->Workflow

Figure 3.29 - Workflow Screen with Sub-Workflow Allowed

## Configuration

Configuration > Service Catalog Manager > Form Manager > Workflow

 Workflow

### Workflow for Testing Checking List V10

-	Step #	Step Name	Return Step	Action
<input type="radio"/>	-	Request Create		<input type="button" value="Edit"/>
<input type="radio"/>	1	Assign QA Reviewer	Request Create	<input type="button" value="Edit"/>
<input type="radio"/>	2	QA Confirmation/Identification	Assign QA Reviewer	<input type="button" value="Edit"/>
<input type="radio"/>	3	Design/Development Review	QA Confirmation/Identification	<input type="button" value="Edit"/>
<input type="radio"/>	4	Assign Developers	Design/Development Review	<input type="button" value="Edit"/>
<input type="radio"/>	5	Development	Assign Developers	<input type="button" value="Edit"/>
<input type="radio"/>	6	Development Testing	Development	<input type="button" value="Edit"/>
<input type="radio"/>	7	Load to Staging System	Development	<input type="button" value="Edit"/>
<input type="radio"/>	8	Staging QA	Assign Developers	<input type="button" value="Edit"/>
<input type="radio"/>	9	Load to Production System	Assign Developers	<input type="button" value="Edit"/>
<input type="radio"/>	10	Creator Review		<input type="button" value="Edit"/>

### Sub-Workflow for Testing Checking List V10

-	Name	Begin Step	End Step	Active	Action
<input type="checkbox"/>	www1	Design/Development Review	Load to Production System	Yes	<input type="button" value="Edit"/> <input type="button" value="Workflow"/>


Once you have defined your main Workflow, click the Add button in the Sub-Workflow area. You will now see the screen shown in Figure 3.30.

Navigation: Configuration->Service Catalog Manager->Form Management  
->Workflow->Add (Below Sub-Workflow)



Figure 3.30 - Add/Edit Sub-Workflow

Configuration

Configuration > Project Manager > Form Manager > Workflow > Sub-Workflow

 Workflow

**Sub-Workflow Demo Form**

Name	<input type="text"/>
Begin Step	-- Select step -- 
End Step	-- Select step -- 
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No

The four entries on the screen are:

1. Name - The display name for this Sub-Workflow
2. Begin Step - The Step in the Workflow where rm<sup>s</sup> will offer the branch to the Request Approver
3. End Step - The Step where the Sub-Workflow rejoins the Workflow. If no End Step exists, Requests never return to the main Workflow.
4. Active - Is this Sub-Workflow active?

After filling the fields out, click the Save button. You will return to the screen in Figure 3.29. Click the Workflow button. You will see a screen similar to the one in Figure 3.23. The mechanics for adding Steps are identical to those described in the section [Workflow](#). Continue adding Steps as required by the logical structure of your workflow.

If you delete the Begin Step or End Step of a Sub-Workflow, you will see a new screen. It has three options:

1. Select a new Begin or End Step
2. Delete the Sub-Workflow
3. Make the Sub-Workflow Inactive.

If you select a new Begin or End Step, you must select it from the dropdown list. If you select Make the Sub-Workflow Inactive, rm<sup>s</sup> will retain the definition but it will not be offered as a branch for Requests. All Requests currently in the Sub-Workflow will be returned to the Step immediately prior to the Sub-Workflow.



Figure 3.31 - Deleted Step Sub-Workflow Options

The deleted step is the Begin or End step for this Sub-Workflow.  
Please select an action for this Sub-Workflow.

Sub-Workflow	Action
Estimate Workflow	<input type="radio"/> Get a new step Begin Step <input type="text" value="Select Step"/> <input type="radio"/> Delete the Sub-Workflow <input type="radio"/> Inactivate the Sub-Workflow

Submit    Cancel

#### 3.2.2.4 Common Forms

##### Definitions:

Common Forms - A Form shared by multiple Forms. A Common Form has no Request Creation Screen.

Junction Form - The definition of the relationship between Common Forms and main Forms.

##### Concepts:

Common Forms are workflows for shared resources working on multiple forms within a Service Catalog. An example is a programming group that does development, maintenance and bug fixing on a computer application. You may have an rm<sup>s</sup> Catalog for the application that has several forms, one for maintenance, another for bug fix requests and another for development and enhancement requests. These may differ by the details of the Form required for each type of request and the workflow may differ because enhancement request go through a different review process before being approved for development. Common Forms are joined to main Forms through Junction Forms.

##### Business Rules and Defaults:

Common Forms exist as unique Forms within a Service Catalog.

Common Forms do not have a Request Creation form.

Common Forms are always User Defined. They cannot be defined using Form Templates.

Common Forms may be shared between two or more Forms.

A Form may have Junctions to as many Common Forms as logically required by the Workflow.

##### Common Form Control: (System and Catalog Administrators Only)

To define a Common Form, go to the Catalog that will contain this Form through the Service Catalog Manager in Configuration. When you click the Add button below the Form list, you will see that the first line on the screen is a radio button labeled Common Form. To make the Form you are defining a Common Form, click Yes for this radio button. Once you do so, the screen will change to the screen shown in Figure 3.32.

*Navigation: Configuration->Service Catalog Manager->Form Management->Add  
Navigation: Configuration->Service Catalog Manager->Form Management->Edit*

**Figure 3.32 - Add/Edit screen for Common Forms**

Form Manager	
<b>Edit Form</b>	
Common Form	<input checked="" type="radio"/> Yes <input type="radio"/> No
Name	<input type="text" value="Common Sample"/>
Allow Sub-Workflow?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Active?	<input checked="" type="radio"/> Yes <input type="radio"/> No
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

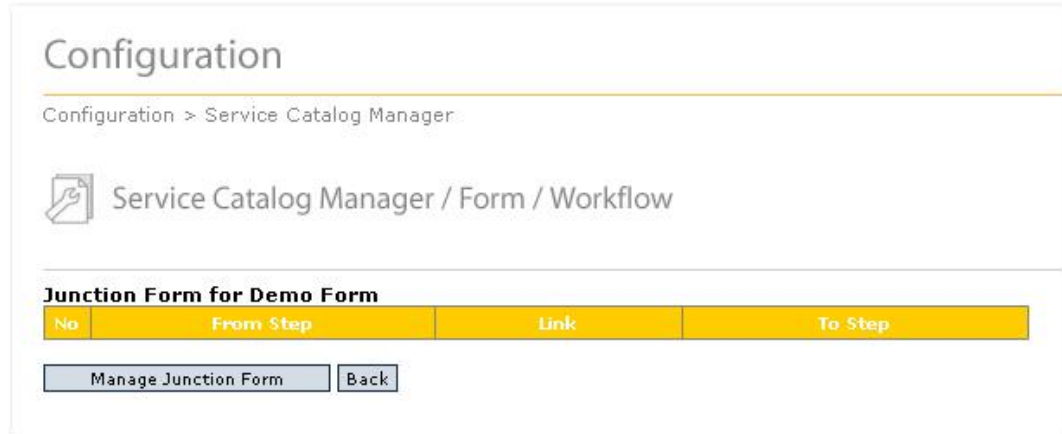
Fill in the display Name for this Form. If this Form will have branches, click the Yes radio button on the line labeled "Allow Sub-Workflows?". As you can see, Templates are not permitted for Common Forms. Click the Save button. When you return to the Forms screen, you will see a new Action button for each Form labeled Junction Form. This will be discussed shortly.

Begin adding steps to the Common Form. When you add the initial workflow Step, no Return Steps will be available. We will cover this later in Junction Forms. If you chose to allow Sub-Workflows, you may add those also. Return steps in the Sub-Workflows will be limited to the Sub-Workflow or the Common Form.

Once you have completed all your Forms, you are now ready to join them together to use the Common Form. If you look at the Form Manager screen under Form Management, Service Catalog Manager, you will see the Junction Form button for each Form. Click the button for one of the main Forms that will join with the Common Form. The screen in Figure 3.33 will now open.


Navigation: Configuration->Service Catalog Manager->Form Management  
->Junction Form (Any Form)

**Figure 3.33 - Junction Form With No Junctions Defined**



Configuration

Configuration > Service Catalog Manager

 Service Catalog Manager / Form / Workflow

**Junction Form for Demo Form**

No	From Step	Link	To Step
----	-----------	------	---------

Click the Manage Junction Form button. The screen shown in Figure 3.34 will now open.

Navigation: Configuration->Service Catalog Manager->Form Management  
->Junction Form->Manage Junction Form

Figure 3.34 - Manage Junction Form

**Junction Form for IT OnTime Virtual IT Resource (VIR.)**

<input type="checkbox"/>	No	From Step	Link	To Step	Action
<input type="button" value="Remove from Current List"/>					

From workflow **IT OnTime Virtual IT Resource (VIR.)** To workflow **common form 2**

Allow return to main workflow.

--	Step Name	--	Step Name
<input type="radio"/>	Review Request	<input type="radio"/>	com1 2
<input type="radio"/>	Assign Developers or Programmers	<input type="radio"/>	com2 2
<input type="radio"/>	Design and Development		
<input type="radio"/>	Design and Development QA		
<input type="radio"/>	Load to Test System		
<input type="radio"/>	User Testing		
<input type="radio"/>	Load to Production System		
<input type="radio"/>	User Review and Sign Off		

The screen has three or four areas. The top area shows any existing Junctions for the Form named in the screen title. If the selected form is a main Form, there will be a yellow bar containing a Check Box labeled "Allow Return to Main Workflow". The left hand column shows the Steps in the current Form. The right hand column has a combo box with a drop down list. If the Form in the left column is a Common Form, the list consists of the names of all main Forms in the Catalog. If the Form is a main Form, the list of names contains the name of all the Common Forms in the Catalog. Below the combo box is the list of Steps in the currently selected Form.


When there are Junctions already defined, you can delete them by clicking the check box next to the name and then clicking the Remove from Current List button.

To join the current Form to another Form, click the radio button next to the Step that is the last workflow step before entering the Common Form. Click the radio button next to the Step where the other Form will start processing the Requests. As you can see, this Step need not be the first Step in the Form. If it is a main Form and Requests can be Returned as well as being Approved, make sure that Allow Return to Main Workflow is checked. Click the Add to Current List button. This information will now appear in the top of the form. When you have completed defining all Junctions for this Form, click the Close button.

Figure 3.35 - Junction Form with a Junction Defined.

Configuration

Configuration > Project Manager

 Project Manager / Form / Workflow

**Junction Form for Web Site Project**

No	From Step	Link	To Step
1	Web Site Project - IT OnTime Review	-->	Demo Project - Common one

Manage Junction Form    Back

If you only specify the Junction Form from the main Form to the Common Form, the Request will move into the workflow of the Common Form and never return. If you wish to return the Request to the main Form, go to the Junction Form for the Common Form and specify a Junction between the Common Form and the main Form. This pairing of Junctions allows the Request to move into the Common Form and back.

### 3.2.2.5 Workflow Exceptions

#### Definitions:

Conditional Workflow – A special workflow sequence determined by the value for one of a number of properties or objects.

#### Concepts:

A Conditional Workflow feature is provided for alternate workflows depending upon certain conditions.

#### Business Rules and Defaults:

Conditional Workflows can be based on Request Creator, Groups, Teams, Request Priority and Request Type.

rm<sup>s</sup> supports the specification of multiple concurrent types of conditional workflow (e.g. both a Priority Conditional Workflow and Group Conditional Workflow). When this is done, Requests skip all Steps specified in all Conditional Workflows. For example, suppose that the standard workflow is A-B-C-D-E, that a Request is in Step B, and that there are two Conditional Workflows. If one Conditional Workflow dictates that the request should continue without skipping additional steps and the second Conditional Workflow dictates that

the Request should skip Step C, the Request will flow to Step D as that is the next Step without a skip condition.

### Conditional Workflow Control: (System and Catalog and Task Administrators)

Conditional workflow is specified by clicking on the Workflow Exceptions button for the Form on the Forms for Catalog screen. A form similar to the one that follows will be displayed.

*Navigation: Configuration->Service Catalog Manager->Form Management  
->Workflow Exceptions (Any Form)*

**Figure 3.36 - Workflow Exceptions**

The screenshot shows the 'Configuration' page for 'Workflow Exception' in the Request Management System. The page title is 'The Request Management System' with a user logged in as 'Admin Demo (admindemo)'. A navigation menu includes Home, Request Approval, Request Manager, Request Dashboard, Request Manager, and Configuration. The breadcrumb trail is 'Configuration > Service Catalog Manager > Form Manager > Workflow Exception'. The main heading is 'Workflow Exception' with a pencil icon. Below this, it specifies 'Workflow Exception for Demonstration Catalog : EQ' and includes a remark: 'Remark: Will skip steps selected in the lists and combine lists using AND method.' A table lists five items for configuration, each with an 'Add/Edit Exceptions' button:

Workflow Exception	
1. Priority	Add/Edit Exceptions
2. Request Type	Add/Edit Exceptions
3. Request Creator	Add/Edit Exceptions
4. Groups	Add/Edit Exceptions
5. Teams	Add/Edit Exceptions

A 'Back' button is located below the table. The footer contains the copyright notice: '© 2002-2006 IT OnTime, Inc. All rights reserved. rml is a trademark of IT OnTime, Inc.'

To add a workflow exception for any of the five permissible items, click the Add/Edit button. A form similar to the following one will appear.

Navigation: Configuration->Service Catalog Manager->Form Management  
->Workflow Exception (Any Form)->Add/Edit Workflow (Any Exception type)

**Figure 3.37 - Workflow Exception List**

Request Creator	
Name	Action
<b>Client (client)</b>	Add/Edit Workflow
<b>Demo Admin (demo admin)</b>	Add/Edit Workflow
<b>Demo User (demo user)</b>	Add/Edit Workflow

Click the Add/Edit button next to the item that is a Workflow Exception. A screen similar to the one following will now appear.

Navigation: Configuration->Service Catalog Manager->Form Management  
->Workflow Exception (Any Form)->Add/Edit Workflow (Any Exception type)->Add/Edit  
Workflow

Figure 3.38 - Exception Specification

**Request Creator**  
Exception for Demo Admin

Web Site Project

- IT OnTime Review
- Assign Programmers
- Design and Development

Remove from Current List

Workflow Lists for Web Site Project

Web Site Project

- Development QA
- User Review
- Client Review

Add to Current List

Close

The table at the top of the screen lists any Steps currently skipped as an exception. To remove a Step, click the check box next to its name and then click the Remove button. The lower half of the screen contains any Steps not skipped as exceptions. To add a Step to the exception list, click the check box next to the Steps that you wish to add and then click the Add to Current List button. Those Steps remaining in the list are the Steps where Requests meeting the criteria for this Exception will now stop. Requests will bypass Steps in the top list.



### 3.2.2.6 User Assignment

#### Concepts:

Before Users can work on Requests, they need to be assigned to Steps by Administrators. A number of different privileges apply to *Users* or *Groups* assigned to a step. Different Users and Groups can have different privileges at the same step. Different privileges can apply for the same Users and Groups at a different step.

#### Step Privilege Summary:

*Read* – Permits Users and Groups to view Request details.

*Update* – Permits Users and Groups to Approve or Return Requests, enter comments, add Attachments, enter Time Tracking Information and Assign Users.

*Cancel* – Permits Users and Groups to cancel requests.

*Allow Email On/Off* – Permits Users and Groups to manage email for this step, providing this is permitted in their User profile.

*Receive Email* – Initial value set by an administrator to control Step email receipt for this step.

#### Step Privilege Control: (All Administrators)

Step privileges are specified by clicking User Assignment for the Form on the Form Manager menu. Access this through Configuration, Service Catalogs and Forms and then by clicking on the Catalog where the Form resides. A screen similar to the following will now appear.

Navigation: Configuration->Service Catalog Manager->Form Management  
->User Assignment (Any Form)

Figure 3.39 - User Assignment

The screenshot displays the 'User Assignment' interface within the Request Management System. The page title is 'The Request Management System' and the user is identified as 'Admin Demo (admindemo)'. The navigation menu includes 'Home', 'Request Approval', 'Report Manager', 'Request Dashboard', 'Request Manager', and 'Configuration' (which is the active page). The breadcrumb trail indicates the path: 'Configuration > Service Catalog Manager'. The main content area is titled 'User Assignment' and shows a table for 'User Assignment for Deer Project : IT OnTime Virtual IT Resource (VIR.)'. The table has a 'Workflow' header and lists ten steps, each with a 'Users and Groups' button. A 'Back' button is located at the bottom left of the table area.

Workflow	
Enter Web Site Update Request	Users and Groups
Review Request	Users and Groups
Assign Developers or Programmers	Users and Groups
Design and Development	Users and Groups
Design and Development QA	Users and Groups
Load to Test Systems	Users and Groups
User Testing	Users and Groups
Load to Production System	Users and Groups
User Review and Sign Off	Users and Groups

Back

Clicking the Users and Groups button will display a screen for assigning Users and Groups for that step. It will list all Users and Groups available to work on the Catalog. The following figure shows a sample User Privileges screen for a Step.

Navigation: Configuration->Service Catalog Manager->Form Management  
->User Assignment (Any Form)->Users and Groups (Any Step other than Request Create Step)

Figure 3.40 - Assign Users - (Other Than a Request Create Step)

The screenshot shows a web application window titled "Request Management System - Microsoft Internet Explorer". The main content area is titled "Catalog Max's Test Catalog Form Group Only Form" and is under the "Design and Development" section. There are two tables and several buttons.

**Design and Development Table:**

<input type="checkbox"/>	Name	Read	Update	Cancel	Allow Email On/Off	Receive Email	Action
<input type="checkbox"/>	User Admin1 (useradmin1)	✓	✓	✓	✓	✓	Edit

Below this table is a button: "Remove from Current List".

**Users Table:**

<input type="checkbox"/>	Name	Read	Update	Cancel	Allow Email On/Off	Receive Email
<input type="checkbox"/>	Demo User	✓	✓	✓	✓	✓
<input type="checkbox"/>	Task Admin1 (taskadmin1)	✓	✓	✓	✓	✓
<input type="checkbox"/>	Mario	✓	✓	✓	✓	✓
<input type="checkbox"/>	Superman	✓	✓	✓	✓	✓

Below the Users table are two buttons: "Add to Current List" and "Close".

To assign a User or Group to the Step, click the check box next to the name. Click the check boxes to assign their permissions. Multiple Users may be selected and each may have different permissions. Once you have selected all the Users that you want to assign to the step, click Add to Current List.

To remove User Privileges for a Step, click the check box next to the User's name and then click Remove from the Current List. You may select multiple users.

To change User Privileges for the Step, click the Edit button. The following screen will open.

*Navigation: Configuration->Service Catalog Manager->Form Management  
->User Assignment (Any Form)->Users and Groups->Edit*

**Figure 3.41 - Edit Permissions**



Name	Read	Update	Cancel	Allow Email On/Off	Receive Email
User Admin1 (useradmin1)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

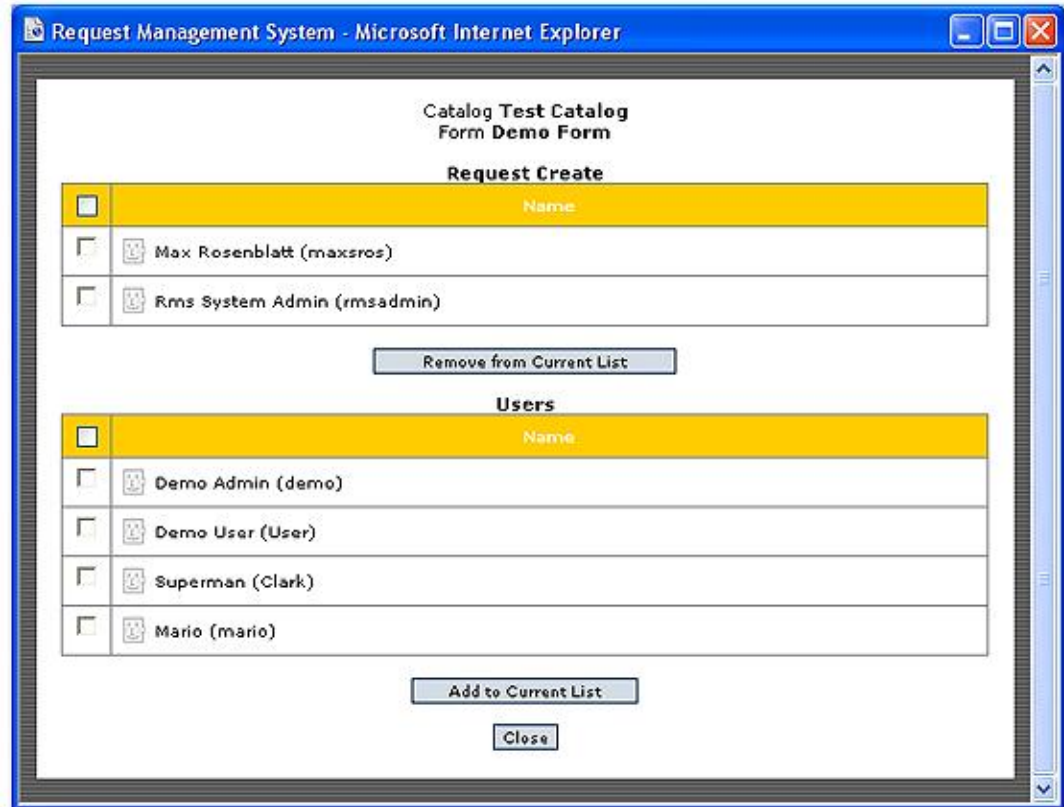
Save Cancel

Check or uncheck the Permissions you wish to change and then click the Save button. If you change your mind, click the Cancel button.

The screen for Request Create steps is similar but lacks permissions as they are not relevant. Figure 4.11 shows this form.

Navigation: Configuration->Service Catalog Manager->Form Management  
->User Assignment (Any Form)->Users and Groups (Request Create Step)

Figure 3.42 - Assign Users - Request Create Step.



The screen works the same as described above but lacks permissions and the Edit button for permissions.

The top part of the screen contains the list of Catalogs, Forms and Steps where this user is currently assigned. Next to the Step name is the list of current privilege grants. To the right is the Edit button to change these.

To assign Users to Steps, click the check box next to the Step name in the lower list. Check or uncheck any privileges and then click the Add to Current List button. The display will now reflect the changes. The Steps selected will appear in the upper list and no longer appear in the lower list. To remove a User's privileges, check the box next to the Step name and click the Remove from Current List button.

### 3.3 Step Assignment

#### Concepts:

Step Assignment provides an alternative way to assign privilege to Users. Rather than assigning all Users to one Step at a time, Step Assignment allows a User to be assigned to multiple Steps within Forms.

## Step Privilege Summary:

*Read* – Permits Users and Groups to view Request details.

*Update* – Permits Users and Groups to Approve or Return Requests, enter comments, add Attachments, enter Time Tracking Information and Assign Users.

*Cancel* – Permits Users and Groups to cancel requests.

*Allow Email On/Off* – Permits Users and Groups to manage email for this step, providing this is permitted in their User profile.

*Receive Email* – Initial value set by an administrator to control Step email receipt for this step.

## Step Assignment: (All Administrators)


Step Assignment does the same thing as *User Assignment* but from the perspective of a single User rather than a single Step. To access Step Assignment, click the Step Assignment button for any Service Catalog. When you do this, you will see the following form.

*Navigation: Configuration->Service Catalog Manager->Step Assignment (Any Catalog)*










**Figure 3.43 - Step Assignment**

**Configuration**

Configuration > Service Catalog Manager > Catalog User(s) and Group(s)

 Assign Users and Groups

**empty project**

	Name	Action
<input type="checkbox"/>	 <a href="#">Team 1</a>	Edit Step Assignment
<input type="checkbox"/>	 <a href="#">Team 2</a>	Edit Step Assignment
<input type="checkbox"/>	 Max Rosenblatt (maxsros)	Edit Step Assignment
<input type="checkbox"/>	 Pairoj V (pairojv)	Edit Step Assignment
<input type="checkbox"/>	 Demo Admin (Demo)	Edit Step Assignment
<input type="checkbox"/>	 Rms System Admin (rmsadmin)	Edit Step Assignment
<input type="checkbox"/>	 Demo User (User)	Edit Step Assignment
<input type="checkbox"/>	 Wipaporn T. (puk)	Edit Step Assignment
<input type="checkbox"/>	 Superman (Clark)	Edit Step Assignment

The form contains a table that contains all Users and Groups currently assigned to the Catalog. Next to each User or Group are two buttons. The first button, Edit, allows you to change the User information. For a complete explanation of Edit for Users see the section [Users](#) later in this manual. For a complete explanation of Edit for Groups, see the section

[Groups](#) later in this manual.

If you click the Step Assignment button, you see a screen similar to the following screen.

*Navigation: Configuration->Service Catalog Manager->Step Assignment  
->Step Assignment*

**Figure 3.44 - Step Assignment**

**Step Assignment for Catalog Admin1 (catalogadmin1)**

<input type="checkbox"/>	Step Name	Read	Update	Cancel	Allow Email On/Off	Receive Email	Action
<b>New User Test1 - Doc Form 1</b>							
<input type="checkbox"/>	Assign Developers or Programmers	✓	✓	✓	✓	✓	Edit
<input type="checkbox"/>	Design and Development	✓	✓	✓	✓	✓	Edit

Workflow Lists for Doc Form 1 ▼

<input type="checkbox"/>	Step Name	Read	Update	Cancel	Allow Email On/Off	Receive Email
<input type="checkbox"/>	Enter Web Site Update Request					
<input type="checkbox"/>	Review Request	✓	✓	✓	✓	✓
<input type="checkbox"/>	Design and Development QA	✓	✓	✓	✓	✓
<input type="checkbox"/>	Load to Test System	✓	✓	✓	✓	✓
<input type="checkbox"/>	User Testing	✓	✓	✓	✓	✓
<input type="checkbox"/>	Load to Production System	✓	✓	✓	✓	✓
<input type="checkbox"/>	User Review and Sign Off	✓	✓	✓	✓	✓

The upper table shows all the Step assignments for the current User or Group. The list is organized by Form. The lower table shows all the Steps the User or Group is not assigned to in the Form currently showing in the drop down list. In all other ways, this screen works identically to the screens in [User Assignment](#).

Only System Administrators will see the Add Groups to Catalog and Add Users to Catalog buttons. The screens that appear when they are clicked are described in [Groups](#) and [Users](#) respectively.

### 3.4 Teams

#### Definitions:

Team members – Users who are assigned to a Team.

Team leader – An individual who has certain privileges in viewing activity associated with Team members.

### **Concepts:**

A Team is a way of segregating Request activity within a Form. Unlike Users and Groups, Teams do not grant permissions in Workflow steps. Team member permissions are defined by their User or Group Permissions.

Work submitted by a Team member cannot be viewed or processed by individuals on other teams despite their assignment to a Step. For example, it may be desired that Request approvers from the West Region only see Requests submitted by individuals from the West Region and not see Requests submitted by East Region individuals.

All classes of Administrators may define Teams and control Team membership. A Team may be assigned one or more team leaders who have special privileges concerning Team Requests. Teams are not assigned to workflow steps but assigning a team member to a step automatically limits the Requests they can process to Requests submitted by a fellow Team member. This limitation extends to Administrators.

Users who are not members of any team will see all Requests for Steps to which they are assigned.

### **Business Rules and Defaults:**

Any number of Teams may be defined for a given Service Catalog. Teams do not span Service Catalogs.

Team names must be unique within a Catalog. The same Team name may exist in different Service Catalogs and the teams are independent.

When a Team is first created, it has no members. Any number of members may subsequently be assigned to each Team.

Individuals may be assigned to more than one Team. In such a case, assigning that individual to a step results in the individual being able to process Requests from each Team to which they belong.

Teams may not be assigned to other Teams or to Groups.

Team Leaders can view all Team Requests. Team members who are not Team Leaders have the same viewing privilege as normal users – they can only view their own Requests unless Assigned to a Step.

### **Team Control: (All Administrators)**

Teams are defined and edited and membership managed by clicking the Team Manager button. Navigate to there by clicking the Team Management button on the Catalog Manager screen. The following form will open:



Navigation: Configuration->Service Catalog Manager->Team Management

**Figure 3.45 - Team Management**

<input type="checkbox"/>	Name	Action
<input type="checkbox"/>	Demo Team	Edit Users
<input type="checkbox"/>	Sample Team	Edit Users

Add Delete Back

The table lists all Teams for this Catalog. To create a new Team, click the Add button. To delete a Team, click the check box next to the name of the Team you wish to delete. Deleting the Team does not delete the Team's members.

Click the Add button to Add a new Team. Click the Edit button to edit an existing Team. The shown below will not open.

Navigation: Configuration->Service Catalog Manager->Team Management->Add

Navigation: Configuration->Service Catalog Manager->Team Management->Edit

**Figure 3.46 - Add/Edit Team**

Name	<input type="text"/>
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No

Save Cancel

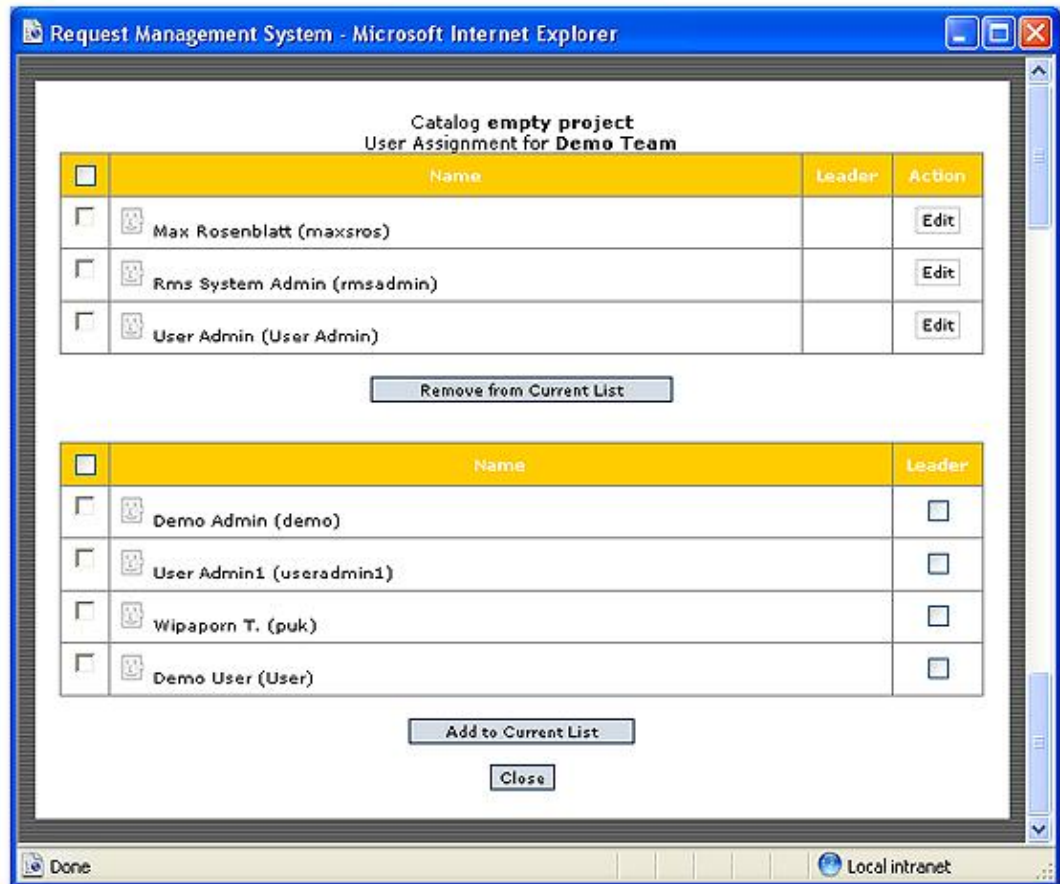
A Team may be made inactive by clicking the Active:No radio button on the above form. The Team composition is maintained but the Team no longer functions as described above.

Members are added to a Team by clicking the Add Users to Team button. The screen

similar to the follow one will open:

*Navigation: Configuration->Service Catalog Manager->Team Management->Users*

**Figure 3.47 - Assign Users to a Team**



Click the check box next to the User's name. If the person is a Team Leader, click the Leader check box for that User. Once you have selected all members for the Team, click the Add to Current List button. The list of Users in the top table will now include the new members. Click the Leader check box next to the User who will be a Team Leader. Teams may have multiple leaders.

To delete Team members, click the check box next to the Team member's name. Once all are selected, click the Remove From Current List button.

## 3.5 Support

### Definitions:

Support Form – A rm<sup>s</sup> generated email form that provides a Catalog specific message and email contact.

### Concepts:

Each Catalog can now have a separate support message and email destination.

Once this information is entered for a Catalog, rm<sup>s</sup> will provide a mail form displaying the text along with a short text type subject fill in box and a long text fill in box for extensive description of the help request.

### Business Rules and Defaults:

The default support action when a user selects Support is an email client generated email to [support@it-ontime.com](mailto:support@it-ontime.com).

After filling in the Support information for a Catalog, a system generated mail form addressed to the email address specified.

### Specifying Support Information (System and Catalog Administrators Only)

To specify support information for a Catalog, go to the Service Catalog Manager. In the Actions list there is a Support button for each Catalog. Click the button for the Catalog of interest.

Navigation: Configuration->Service Catalog Manager

**Figure 3.48 - Support Button**

<input type="checkbox"/>	<b>Max's Test Catalog</b> Time Zone: -1 05:00 Eastern Time (US & Canada)	Support Edit Catalog Form Management Field Type Management Step Assignment Team Management Support
<input type="checkbox"/>	puk catalog	Edit Catalog

After clicking the Support button, the following form will open.

Navigation: Configuration->Service Catalog Manager->Support

**Figure 3.49 - Support Setup Form**

The screenshot shows the 'Support Setup Form' within the Request Management System. The page title is 'The Request Management System' and the user is 'Admin Demo (admin@demo)'. The breadcrumb trail is 'Configuration > Service Catalog and Forms > Support'. The main content area is titled 'Support' and 'Demonstration Catalog'. Below this, there is a 'Support Edit' section with two fields: 'Support Text' and 'Support Mail'. The 'Support Text' field contains the text: 'If you have any usage questions, please fill in the form. We will get back to you shortly.' The 'Support Mail' field contains the email address 'Demo@it-ontime.com'. At the bottom of the form, there are 'Save' and 'Back' buttons. A 'Log off' button is visible in the top right corner of the page.

After filling in the Support Text and Email Address, click the Save button.

When a User clicks on the Support Question Mark (?) and selects Support from the list, they will see a form similar to the one shown in the next figure.

**Figure 3.50 - Support Mailto Form**



# The Request Management System

If you have any usage questions, please fill in the form. We will get back to you shortly.

To:

Subject:

Message

---

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The email generated by rm<sup>s</sup> looks similar to the one in the following figure.

*Figure 3.51 - Support Email*



# Top Level Intro

This page is printed before a new  
top-level chapter starts

# Part



IV

## 4 User Management

This section deals with the administration of Users and Groups that are collections of Users. Any person accessing rm<sup>s</sup> must first be a User. Administrators may be Users. This is independent to belonging to an Administrator class.

The first step in using rm<sup>s</sup> is to define the Users who will be System Administrators. rm<sup>s</sup> ships with a default System Administrator account of rmsadmin with a password of rmsadmin. Use this account to establish the first System Administrator and then change the password. See the procedure for defining usernames and passwords in the Users section of this manual.

rm<sup>s</sup> can also use your network's Active Directory to define Users and Groups. Once you establish a connection to the Active Directory, you can specify those Users and Groups who will use rm<sup>s</sup>. Once defined, they function the same users defined within rm<sup>s</sup>.

### 4.1 Users

#### Definitions:

User - A user created within rm<sup>s</sup> by entering their information through the User Add/Edit forms.

ADSI User - A user defined in the network's Active Directory and imported into rm<sup>s</sup>. Note, your installation may not have ADSI Users. ADSI is a separately purchased rm<sup>s</sup> extension. If you have questions, please check with your rm<sup>s</sup> Administrator.

#### Concepts:

A User is any individual defined in rm<sup>s</sup> with a user ID and password. Users are assigned to Catalogs.

#### Business Rules and Defaults:

A user ID can be any string up to 20 characters long and may include numerals, special characters and spaces. User IDs must be unique. User IDs are not case-sensitive.

A password must be a minimum of 7 characters long and may include numerals, special characters and spaces. Maximum password length is 20 characters. Passwords are case sensitive.

If a user is flagged as *inactive*, that person cannot log on to rm<sup>s</sup>.

Users may be assigned to one or more Catalogs. A System Administrator is the only one who can assign an existing User to another Catalog.

ADSI User credentials cannot be changed from within rm<sup>s</sup>. If they are changed in the Active Directory, rm<sup>s</sup> will reflect that change.

If the Active Directory entry for a user does not contain an email address, that person will be Inactive within rm<sup>s</sup>. Once the Active Directory contains an email address, that User can now be Active.



Administrators can define users by going to Configuration. In the Users section, you will see different selections depending upon your Administrative privileges and your rm<sup>s</sup> license. The following table shows your selections.

Administrator Class	Menu Items Available
System	Add/Edit rm <sup>s</sup> Users Add/Edit ADSI Users (Requires ADSI Plug-in License) Assign Users to Catalogs
Catalog	Add/Edit rm <sup>s</sup> Users - Current Catalog Only
Task	Add/Edit rm <sup>s</sup> Users - Current Catalog Only
User	Add/Edit rm <sup>s</sup> Users - Current Catalog Only

### Add rm<sup>s</sup> Users: (All Administrators)

After clicking on Users, you will see a screen similar to the one in Figure 4.1.

Navigation: Configuration->User Management->Users

Figure 4.1 - rm<sup>s</sup> Users

The screenshot displays the 'User Management' section of the 'The Request Management System' interface. At the top, the user is identified as 'Admin Demo (admindemo)'. A navigation menu includes 'Home', 'Request Approval', 'Report Manager', 'Request Dashboard', 'Request Manager', and 'Configuration'. The main content area is titled 'Configuration' and 'User Management'. A search form allows filtering users by catalog (currently 'All Catalogs'), entering a name, and setting a page size of 20. Below the search form is a table listing 14 users. Each user entry includes a checkbox, a name, and an 'Action' column with 'Edit' and 'Assign to Catalogs' buttons. Some users (som1, som2, som3) have red text indicating they no longer exist on the network. At the bottom, there are buttons for 'Import ADSI Users', 'Add', 'Delete', and 'Back', along with a footer containing copyright information for IT OnTime, Inc.

	Name	Action
<input type="checkbox"/>	<a href="#">Admin Demo (admindemo)</a>	Edit Assign to Catalogs
<input type="checkbox"/>	<a href="#">baer (baer)</a>	Edit Assign to Catalogs
<input type="checkbox"/>	<a href="#">barger (barger)</a>	Edit Assign to Catalogs
<input type="checkbox"/>	<a href="#">Khanabwan (some)</a>	Edit Assign to Catalogs
<input type="checkbox"/>	<a href="#">Rms System Admin (rmsadmin)</a>	Edit Assign to Catalogs
<input type="checkbox"/>	som1 test (som1@rms2k.com) (ADSI User) <i>User no longer exists on the network.</i>	Edit
<input type="checkbox"/>	som2 (som2@rms2k.com) (ADSI User) <i>User no longer exists on the network.</i>	Edit
<input type="checkbox"/>	som3 (som3@rms2k.com) (ADSI User) <i>User no longer exists on the network.</i>	Edit
<input type="checkbox"/>	<a href="#">tempuser (tempuser)</a>	Edit Assign to Catalogs
<input type="checkbox"/>	<a href="#">User Demo (userdemo)</a>	Edit Assign to Catalogs
<input type="checkbox"/>	<a href="#">user_6261 (user_6261)</a>	Edit Assign to Catalogs
<input type="checkbox"/>	<a href="#">User_8650_1 (User_8650_1)</a>	Edit Assign to Catalogs
<input type="checkbox"/>	<a href="#">User_8650_2 (User_8650_2)</a>	Edit Assign to Catalogs
<input type="checkbox"/>	<a href="#">User_8650_3 (User_8650_3)</a>	Edit Assign to Catalogs
<input type="checkbox"/>	<a href="#">User_GroupTest1 (User_GroupTest1)</a>	Edit Assign to Catalogs

Total 34 Records Page: | 1 | 2 |

Import ADSI Users Add Delete Back

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To add a new rm<sup>s</sup> User, click the Add button. To change attributes of an existing user, click the Edit button. In either case, you will see the screen shown in Figure 4.2.

Navigation: Configuration->User Management->Users->Add  
 Navigation: Configuration->User Management->Users->Edit

Figure 4.2 - Add/Edit User

The screenshot shows the 'Add/Edit User' form in the Request Management System. The form is titled 'Configuration' and includes the following fields and options:

- Personal Information:**
  - \* First Name
  - Last Name
  - \* Email
  - Telephone
- User Information:**
  - \* User Name
  - \* Password (must be at least 7 characters)
  - \* Confirm Password
- Options:**
  - Format Date:  USA (mm/dd/yyyy)  English (dd/mm/yyyy)
  - Email Notification:  HTML  Text
  - Long/Short Email:  Long  Short
  - Allow Email On/Off:  Yes  No
  - Active:  Yes  No

At the bottom of the form, there are 'Save' and 'Cancel' buttons. A legend indicates that fields with an asterisk (\*) are required.

Any field with an asterisk (\*) before it is required. The top part of the form contains personal information about the user. The second part of the form contains the rm<sup>s</sup> user information. The requirements for these were discussed earlier in Business Rules and Defaults. The third part of the form contains rm<sup>s</sup> option selections.

**Format Date** - This selects the date format that rm<sup>s</sup> uses for this user. Choices are USA dates - mm/dd/yyyy or English dates - dd/mm/yyyy. Any user upgraded from a previous rm<sup>s</sup> version defaults to USA dates. All new users default to USA dates.

**Email Notification** - rm<sup>s</sup> sends emails to notify users of Request activities. They are available in two forms, HTML formatted or plain text. IT OnTime recommends the HTML emails as they are easier to read. However, if your email system or the user's email device does not support HTML email, click the radio button for Text Emails.

**Long/Short Email** - A long email contains the history of the Request's movement through

the Workflow. A short email contains the Request Body information and the most recent Request Approval information. If you want the user to be able to quickly see what is going on with Requests, long emails are better. If you only want the user to see the current status, select short emails.

Allow Email On/Off - This controls whether or not a User can change their rm<sup>s</sup> email settings. If set to On, Users can use Email On/Off to turn off their emails. If a user is logging into rm<sup>s</sup> frequently, you may allow them to do this. However, IT OnTime has had experiences where vital Request fulfillers turned off their emails and did not know that work arrived.

Active - Use this to deactivate users who are no longer with the company or part of the team using rm<sup>s</sup>.

Once you have completed the form, click the Save button. This completes adding an rm<sup>s</sup> User.

To delete a User, click the check box next to the User's name shown in Figure 4.1 and then click the Delete button. IT OnTime does not recommend deleting users. Instead, make the user inactive by selecting the No radio button in the above form. rm<sup>s</sup> will retain information about the user for reporting but the User will no longer be able to access rm<sup>s</sup>.


If you are a Catalog, Task or User Administrator, the new User is automatically added to the current Catalog. The screen for creating and editing rm<sup>s</sup> users will not have the Assign to Catalogs button shown in Figure 4.1. Instead, you will just see an Edit button as shown here.

*Navigation: Configuration->User Management->Users*

**Figure 4.3 - Catalog, Task and System Administrator Create/Edit User**


### Configuration

Configuration > User Management


User Management

Search Users

User for	New User Test1 <span style="float: right;">▼</span>
Name	<input style="width: 90%;" type="text"/>
Page Size	20 Per Page

	Name	Action
<input type="checkbox"/>	 1. Catalog1 User1 (catalog1user1)	<input type="button" value="Edit"/>

Total 1 Records Page: | 1 |

## Assigning Users to Catalogs: (System Administrators Only)

If you are a System Administrator, the new User is not assigned to any Catalog. To assign the new User to a Catalog, click the Assign to Catalogs button shown in Figure 4.1. The following screen will now open.

*Navigation: Configuration->User Management->Users->Assign to Catalogs*

**Figure 4.4 - Assign User to Catalogs**

Catalog Assignment for **Admin Demo (admindemo)**

<input type="checkbox"/>	Catalog Name	Active	Action
<input type="checkbox"/>	Demonstration Catalog	✓	Edit

Remove from Current List

<input type="checkbox"/>	Catalog Name	Active
<input type="checkbox"/>	Beer Project	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Som Catalog	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Test Group Catalog	<input checked="" type="checkbox"/>

Add to Current List

Close

The upper table shows the current Catalog assignments for this User. The lower table shows all Catalogs in the current  $rm^s$  instance.

Assigning a User to a Catalog does not create work assignments within  $rm^s$ . Catalog assignment only makes the User visible in potential assignment lists for the Catalog.

## Add ADSI Users: (System Administrators Only)

If you have licensed the ADSI module for  $rm^s$  and set up a connection to the ADSI server as described in [ADSI Server Configuration](#), you can define  $rm^s$  Users from the set of users in the Active Directory. These users will have the same log in credentials within  $rm^s$  as they have within other applications that use the Active Directory for logins.

The User Management screen will have an additional button as shown in the following figure.

Navigation: Configuration->User Management->Users

Figure 4.5 - User Management with ADSI Configured

Configuration

Configuration > User Management

User Management

Search Users

User for	All Users
Name	<input type="text"/>
Page Size	20 Per Page

Find

<input type="checkbox"/>	Name	Action
<input type="checkbox"/>	1. Catalog Admin1 (catalogadmin1)	Edit Assign to Catalogs
<input type="checkbox"/>	2. Catalog1 User1 (catalog1user1)	Edit Assign to Catalogs
<input type="checkbox"/>	3. Max 4XPTTest (max4xptest)	Edit Assign to Catalogs
<input type="checkbox"/>	4. Max Rosenblatt (max.rosenblatt@it-ontimehq.com) (ADSI User)	Edit Assign to Catalogs
<input type="checkbox"/>	5. Max Rosenblatt (maxr@it-ontimehq.com) (ADSI User)	Edit Assign to Catalogs
<input type="checkbox"/>	6. RealSystem Admin (Rsysadmin@it-ontimehq.com) (ADSI User)	Edit Assign to Catalogs
<input type="checkbox"/>	7. Rms System Admin (rmsadmin)	Edit Assign to Catalogs
<input type="checkbox"/>	8. XPTTest User (xptestuser@it-ontimehq.com) (ADSI User)	Edit Assign to Catalogs

Total 8 Records Page: | 1 |

Import ADSI Users Add Delete Back

You can see that all Users, rm<sup>s</sup> and ADSI defined users appear in the list.

To import ADSI users into rm<sup>s</sup>, click the Import ADSI Users button. The following screen will now appear.

*Navigation: Configuration->User Management->Users->Import ADSI Users*

***Figure 4.6 - Import ADSI Users***

ADSI Users	
<input type="checkbox"/>	Name
<input type="checkbox"/>	 aa@c.com (aa@c.com)
<input type="checkbox"/>	 berger (berger@rms2k.com)
<input type="checkbox"/>	 den (den@rms2k.com)
<input type="checkbox"/>	 Max Test1 (maxtest1@rms2k.com)
<input type="checkbox"/>	 Max Test2 (maxtest2@rms2k.com)
<input type="checkbox"/>	 Nung V. V (12345@rms2k.com)
<input type="checkbox"/>	 pangpon (pangpon@rms2k.com)
<input type="checkbox"/>	 ukk kan (ukk@rms2k.com)
<input type="checkbox"/>	 ukk@rms2k.com (ukk@rms2k.com)
<input type="checkbox"/>	 user 3 (user3@rms2k.com)
<input type="checkbox"/>	 user 4 (user4@rms2k.com)
<input type="checkbox"/>	 UserNo106 (UserNo106@it-ontime.com)
<input type="checkbox"/>	 UserNo107 (UserNo107@it-ontime.com)
<input type="checkbox"/>	 UserNo108 (UserNo108@it-ontime.com)
<input type="checkbox"/>	 UserNo109 (UserNo109@it-ontime.com)
<input type="checkbox"/>	 UserNo11 (UserNo11@it-ontime.com)
<input type="checkbox"/>	 UserNo110 (UserNo110@it-ontime.com)
<input type="checkbox"/>	 UserNo111 (UserNo111@it-ontime.com)
<input type="checkbox"/>	 UserNo112 (UserNo112@it-ontime.com)
<input type="checkbox"/>	 UserNo113 (UserNo113@it-ontime.com)
<input type="checkbox"/>	 UserNo114 (UserNo114@it-ontime.com)
<input type="checkbox"/>	 UserNo115 (UserNo115@it-ontime.com)
<input type="checkbox"/>	 Worker2 OK (WK2@rms2k.com)
<input type="checkbox"/>	 xKan K. (kan@rms2k.com)
<input type="checkbox"/>	 yoshi@rms.co.th T (yoshi@rms2k.com)



The list contains all ADSI users who are not currently imported into the rm<sup>s</sup> instance. To import a user, check the check box to the left of the name and click the Add to RMS Users button. They will disappear from this list. When you close this list, they will be in the rm<sup>s</sup> Users list shown in Figure 4.6.

Remember, once this import is completed, you will need to assign the new Users to Catalogs so they are available for Step assignments.

### Edit ADSI Users: (System Administrators Only)


Once, defined, all Users behavior exactly the same way within rm<sup>s</sup>. The only difference is ADSI user information read from the Active Directory cannot be changed from with rm<sup>s</sup>. In addition, changing rm<sup>s</sup> related information previously described is restricted to System Administrators. If you click the Edit button next to an ADSI user, you will see the following screen.

*Navigation: Configuration->User Management->Users->Edit (ADSI User)*

**Figure 4.7 - Edit ADSI User**

Configuration

Configuration > User Management > Add/Edit User

 Add/Edit User

**Load From ADSI Server**  
Click this button to get user's information from the ADSI Server.

* First Name	Max
Last Name	Rosenblatt
* Email	maxr@it-ontime.com
Telephone	866-210-5205 x600

* User Name	maxr@it-ontimehq.com
-------------	----------------------

Email Notification	<input checked="" type="radio"/> Html <input type="radio"/> Text
Long/Short Email	<input checked="" type="radio"/> Long <input type="radio"/> Short
Allow Email On/Off	<input checked="" type="radio"/> Yes <input type="radio"/> No
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No

\* Required

As you can see, all the user identification and credential fields are Read-Only. You can change the four rm<sup>s</sup> characteristics by clicking the appropriate radio button. In addition,

there is a button near the top of the form, Load From ADSI Server. This button is used when you know that the information about this user was updated since you last logged in. For example, any user without an email address is automatically Inactive within rm<sup>s</sup>. If you just updated the Active Directory entry for the user, you can retrieve that information by clicking the Load From ADSI Server button. A user's information is automatically updated when they log in so use of this button will be infrequent.

The Assign Step button will be discussed in [Step Privileges](#).

## 4.2 Groups

### Definitions:

Group members – Users who are assigned to a Group.

### Concepts:

A Group is a way of assigning a collection of Users the same Catalog Assignments and User privileges and in general simplifying User administration. A Group may be assigned to one or more Catalogs and one or more steps within a Form or may be used for defining Conditional Workflows. The members of a group assigned to a Step receive privileges for the Step. All members of the Group have the same privileges. However, email privileges in individual User profiles will override the email settings for the group in much the same way they do for Users. All classes of Administrators may define Groups and control Group membership. Active Directory groups can be used as rm<sup>s</sup> Groups.

### Business Rules and Defaults:

Any number of Groups may be defined. Groups span Service Catalogs and are assigned to Catalogs by a System Administrator.

Group names must be unique.

When a Group is first created, it has no members. Any number of members may subsequently be assigned to each Group. The exception is ADSI Groups. The Active Directory Group defines the Group's membership.

Importing an ADSI group also imports the members of the group as ADSI users. These are then available for manipulation as individual Users.

Individuals may be assigned to more than one group. If the individual is a member of Groups assigned to the same step, the individual's privileges are "or-ed", i.e. if one Group provides email on/off and the other group does not, email on/off will be provided.

Groups may not be members of other Groups.

### rm<sup>s</sup> Groups: (All Administrators)

rm<sup>s</sup> managed Groups are defined, edited and membership is managed by clicking Groups under User Management on the System Configuration menu.

Navigation: Configuration->User Management->Groups

Figure 4.8 - Groups

Configuration

Configuration > Group Management

Group Management

Search Groups	
Group For	All Users
Name	
Page Size	20 Per Page

Find

	Name	Action
<input type="checkbox"/>	1. Catalog1 Group1	Edit Assign to Catalogs

Total 1 Records

Page: | 1 |

Add Delete Back

The table lists all Groups that the current Administrator can see. A System Administrator can see all Groups in the rm<sup>s</sup> instance. A Catalog, Task or User Administrator can see only those Groups assigned to the current Catalog.

Click the Add button to Add a new Group. Click the Edit button to edit an existing Group. The form shown in Figure 4.9 will open.

Navigation: Configuration->User Management->Groups->Add  
Navigation: Configuration->User Management->Groups->Edit

**Figure 4.9 - Add/Edit rm<sup>s</sup> Group**

Edit Group	
Name	<input type="text"/>
Members	<input type="button" value="Add/Remove Users"/>
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No

Fill in the Group name. Remember that Group names must be unique within an rm<sup>s</sup> instance.

A Group may be made inactive by clicking the Active:No radio button on the above form. Assignments are maintained but the Group's members no longer have access to Steps with the privileges assigned through the group.

Members are added or removed from the group by clicking the Add/Remove Users button. The screen similar to the following one will open:

Navigation: Configuration->User Management->Groups->Add/Remove Users

Figure 4.10 - Assign Users to an rm<sup>s</sup> Group

Catalog Assignment for **Catalog1 Group1**

<input type="checkbox"/>	Catalog Name	Active	Action
<input type="checkbox"/>	New User Test1	✓	Edit

Remove from Current List

<input type="checkbox"/>	Catalog Name	Active
--------------------------	--------------	--------

Add to Current List

Close

Members are assigned by clicking the check box next to the User's name. After all members are selected, click the Add to Current List button.

To remove group members, click the check box next to their name and click the Remove from Current List button.

Assigning Groups to Catalogs works identically to Assigning Users to Catalogs. When you click the Assign to Catalogs button, you will see a screen similar to the following screen.

Navigation: Configuration->User Management->Groups->Assign to Catalogs

Figure 4.11 - Assign Groups to Catalogs

User Assignment for **Group 1**

<input type="checkbox"/>	User Name
<input type="checkbox"/>	Catalog1 User1 (catalog1user1)

Remove from Current List

<input type="checkbox"/>	User Name
<input type="checkbox"/>	Rms System Admin (rmsadmin)
<input type="checkbox"/>	Max 4XPTest (max4xptest)
<input type="checkbox"/>	Catalog Admin1 (catalogadmin1)

Add to Current List

Close

The upper table contains the name(s) of all Catalog assignments for the Groups. The bottom table contains the name of all Catalogs that the current Administrator can manage. If it is a System Administrator, it will list all Catalogs.

To remove a Catalog assignment, click the check box to the left of the Catalog name in the upper table and then click the Remove from Current List button.

To add a Catalog assignment, click the check box to the left of the Catalog name in the lower table and then click the Add to Current List button.

### **rm<sup>s</sup> ADSI Groups: (System Administrators Only)**

ADSI Groups allows you to import Active Directory groups into rm<sup>s</sup>. To do this, you must have an rm<sup>s</sup> license that includes the ADSI component. You must also have configured your ADSI Server connection as described in [ADSI Server Configuration](#). If you click on Groups under User Management, you will see the following page.

Navigation: Configuration->User Management->Groups

Figure 4.12 - Groups with ADSI Component Installed

Configuration

Configuration > Group Management

Group Management

Search Groups

Group for	All Groups
Name	<input type="text"/>
Page Size	20 Per Page

Find

<input type="checkbox"/>	Name	Action
<input type="checkbox"/>	1. Administrators (ADSI Group)	Edit Assign to Catalogs
<input type="checkbox"/>	2. Catalog1 Group1	Edit Assign to Catalogs
<input type="checkbox"/>	3. RMS Users (ADSI Group)	Edit Assign to Catalogs

Total 3 Records Page: | 1 |

Import ADSI Groups Add Delete Back

To Edit an ADSI Group, click the Edit button. The following screen now opens.

Navigation: Configuration->User Management->Groups->Edit

Figure 4.13 - Edit ADSI Group

Configuration

Configuration > Group Management > Edit Group

Add/Edit Group

Name	RMS Users
Members	<ul style="list-style-type: none"> <li> Max Rosenblatt (max.rosenblatt@it-ontimehq.com)</li> <li> XPTest User (xptestuser@it-ontimehq.com)</li> <li> RealSystem Admin (Rsysadmin@it-ontimehq.com)</li> <li> Max Rosenblatt (maxr@it-ontimehq.com)</li> </ul>
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No

Save Cancel

Edit functions differently for ADSI groups. Since the Active Directory defines group membership, the only function available through Edit is Active/Inactive for the Group. Click the radio button and then Save to change the Active status for the group.

While you cannot create an ADSI group, you can create an  $rm^s$  Group and make ADSI users members of that Group. In this case, the Group functions obey the  $rm^s$  Group rules so you can change membership as well as making the Group active or inactive.

Assign to Catalogs works identically for ADSI Groups as it does for  $rm^s$  Groups.

## 4.3 Workers

Workers provide a means to specify people who fulfill Requests but have no need to access  $rm^s$ . Unlike Users, Workers do not have a user name or password. In addition, the amount of information required to specify a user is limited to their First Name, Last Name and their email address. Once specified, Workers are available for time reporting for all Steps where Time Tracking is specified.

### Definitions:

Worker – A person who works on tasks controlled by  $rm^s$  but does not need to log in to the system.

### Business Rules and Defaults:

A Worker is defined by a First Name, Last Name and email address. Names may be duplicated but should not be to avoid confusion when reporting time.

A Worker must be defined and assigned to a Catalog before the Worker may appear in a Time Tracking entry.



## Worker Control:

Administrators can define Workers by going to Configuration. In the Workers section, you will see different selections depending upon your Administrative privileges. The following table shows your selections.

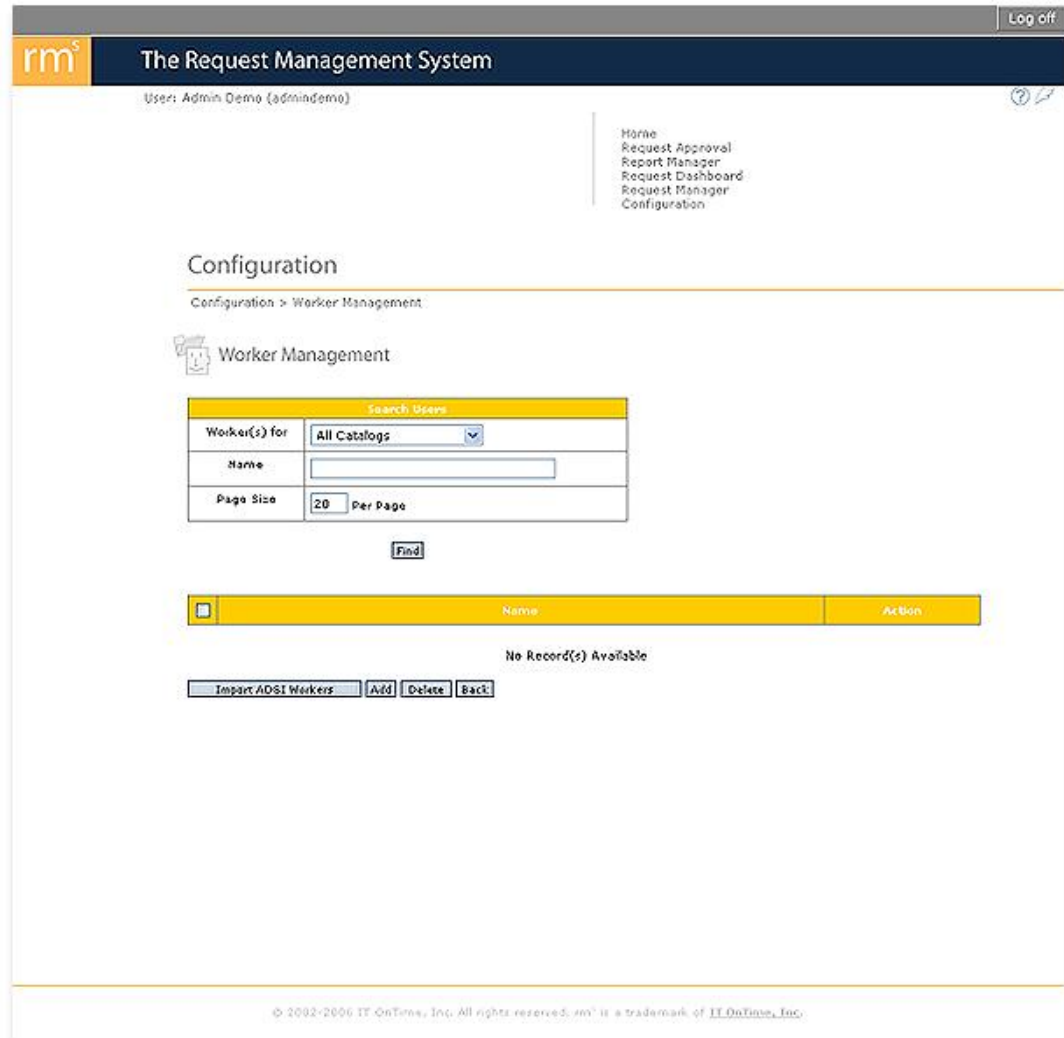
Administrator Class	Menu Items Available
System	rm <sup>s</sup> Workers ADSI Workers Assign Workers to Catalogs
Catalog	rm <sup>s</sup> Workers - Current Catalog Only
Task	rm <sup>s</sup> Workers - Current Catalog Only
User	rm <sup>s</sup> Workers - Current Catalog Only

## rm<sup>s</sup> Workers Manager (All Administrators)

After clicking on Workers, you will see a screen similar to the one in Figure 4.14.

Navigation: Configuration->User Management->Workers

Figure 4.14 - rm<sup>s</sup> Worker Management



The screenshot shows the 'Worker Management' section of the 'The Request Management System' interface. At the top, there is a header with the 'rm<sup>s</sup>' logo and the system name. Below the header, the user is identified as 'Admin Demo (admin@demo)'. A navigation menu is visible on the right side, listing options like 'Home', 'Request Approval', 'Report Manager', 'Request Dashboard', 'Request Manager', and 'Configuration'. The main content area is titled 'Configuration' and 'Worker Management'. It contains a search form with the following fields: 'Worker(s) for' (a dropdown menu set to 'All Catalogs'), 'Name' (a text input field), and 'Page Size' (a dropdown menu set to '20 Per Page'). Below the search form is a 'Find' button. Underneath the search form is a table with columns 'Name' and 'Action', but it is currently empty with the message 'No Record(s) Available'. At the bottom of the table area are buttons for 'Import ADISI Workers', 'Add', 'Delete', and 'Back'. The footer contains the copyright notice: '© 2002-2006 IT OnTime, Inc. All rights reserved. rm<sup>s</sup> is a trademark of IT OnTime, Inc.'

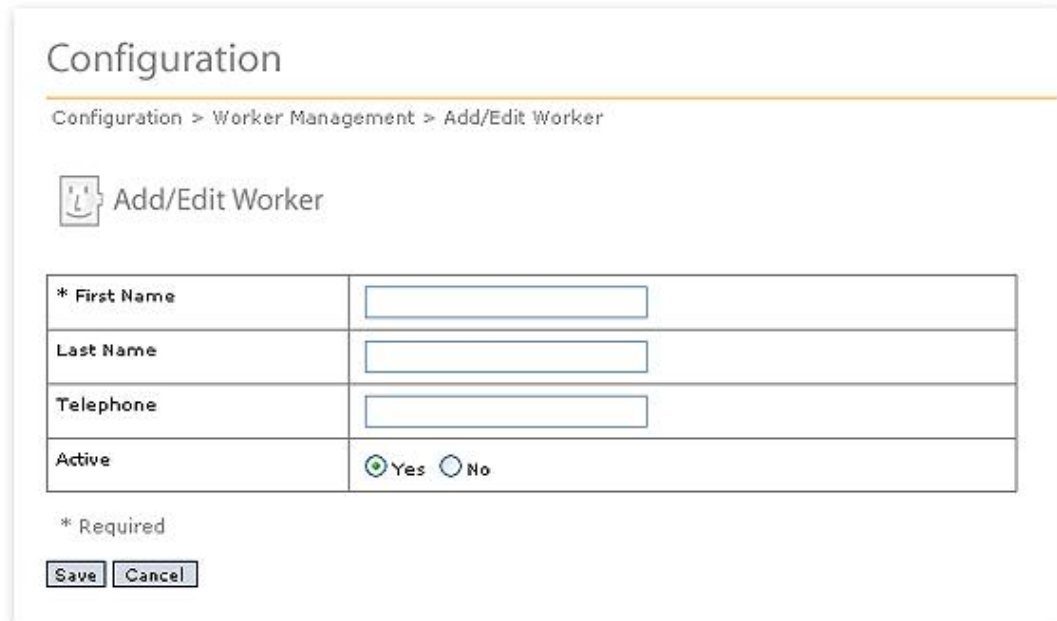
The upper table permits searching for existing Workers. The dropdown list contain the names of Catalogs where you are authorized to create rm<sup>s</sup> workers. Select a Catalog and then the Find button to search for Workers in a Catalog. The text box allows for entering a partial search string for a begins with search.

The lower table contains the list of existing workers for the selected Catalog. The Edit button permits changing information about an existing Worker. Assign to Catalog permits a System Administrator to assign the Worker to any Catalog. Catalog, Task and User Administrators can only create a Worker within an existing Catalog.

To Add a new rm<sup>s</sup> Worker, click the Add button.

Navigation: Configuration->User Management->Workers->Add/Edit

Figure 4.15 - rm<sup>s</sup> Worker Management



The screenshot shows a web-based configuration page titled "Configuration". Below the title is a breadcrumb trail: "Configuration > Worker Management > Add/Edit Worker". The main heading is "Add/Edit Worker" with a small icon of a person. Below this is a form with four rows:

* First Name	<input type="text"/>
Last Name	<input type="text"/>
Telephone	<input type="text"/>
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No

Below the form, there is a note: "\* Required". At the bottom of the form area, there are two buttons: "Save" and "Cancel".

Fill in the form and then click the Save button to create a new rm<sup>s</sup> Worker. Note that only First Name is required. However, you should enter enough information to make the worker easy to recognize.

### ADSI Workers Manager (System Administrators Only)

ADSI Workers allows you to import Active Directory workers into rm<sup>s</sup>. To do this, you must have an rm<sup>s</sup> license that includes the ADSI component. You must also have configured your ADSI Server connection as described in [ADSI Server Configuration](#). If you click on Workers under User Management, you will see the following page.

*Navigation: Configuration->User Management->Workers*

**Figure 4.16 - ADSI Worker Management**

Configuration

Configuration > Worker Management

Worker Management

Search Users

Worker for	All Workers
Name	
Page Size	20 Per Page

Find

	Name	Action
<input type="checkbox"/>	1. Cat1 Worker1	Edit Assign to Catalogs

Total 1 Records Page: | 1 |

Import ADSI Workers Add Delete Back

To add users from the Active Directory as  $rm^s$  Workers, click the Import ADSI Workers button. You will see the following screen.

The information about ADSI worker cannot be changed within  $rm^s$ . If you click the Edit button, you will see the following screen.

*Navigation: Configuration->User Management->Workers->Edit (ADSI Worker)*

Figure 4.17 - Edit ADSI Workers

Configuration

Configuration > Worker Management > Edit Worker

Add/Edit User

**Load From ADSI Server**  
Click this button to get user's information from the ADSI Server.

* First Name	Sql
Last Name	User
Telephone	

* User Name	ssuser@it-ontimehq.com
-------------	------------------------

Active	<input checked="" type="radio"/> Yes <input type="radio"/> No
--------	---

\* Required

**Save** **Cancel**

You can make the Worker Active or Inactive by using the Active radio button and then clicking the Save button. You can also refresh the Active Directory information about the Worker by clicking the Load from ADSI Server button.

*Navigation: Configuration->User Management->Workers->Import ADSI Workers*

Figure 4.18 - Import ADSI Workers

**ADSI Users**

<input type="checkbox"/>	Name
<input type="checkbox"/>	Alice F. Rosenblatt (alice.rosenblatt@it-ontimehq.com)
<input type="checkbox"/>	Internet User (inetuser@it-ontimehq.com)
<input type="checkbox"/>	Sql User (ssuser@it-ontimehq.com)

**Add to RMS Users**

**Close**

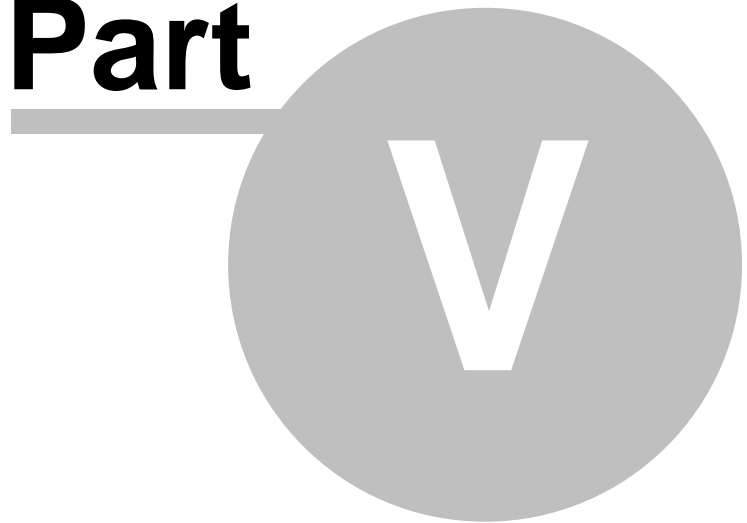
The list contains all Active Directory users not yet imported into rm<sup>s</sup>. To import any user on the list, check the check box next to the user's name and then click the Add to RMS Workers button.



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## 5 Email

### Definitions:

Request Creator Email – Messages sent to the Request Creator (submitter/owner) as the Request moves to new Steps in the workflow.

Step Email – Messages generated as a result of a Request being submitted or promoted into a Step or returned to a Step.

Cancellation Email – Messages generated when canceling a Request.

Completion Email – Messages generated when completing a Request.

Email Type – the specific type of email a User will receive. Each User can receive email in either a HTML or text format and in either a long (all Steps) or short (Request definition and most recently completed Step) format. Hence, there are four possible email types, corresponding to the four possible combinations of these specifications:

Email Type/Email Length	Long Format	Short Format
HTML	Default/Selectable	Selectable
Text	Selectable	Selectable

### Concepts:

Email messages are automatically generated by rm<sup>s</sup> to alert selected users of a Request's progress through the workflow. The email type is specified in the User Profile. Control over when a user receives email is provided to both Administrators and Users. Users can be given rights to change if they receive email or these rights can be limited to Administrators. Email control applies to Users and Groups.

### Business Rules and Defaults:

If a User is assigned to a Step in a Catalog, by default they will receive an email each time a Request enters that Step.

If a Group is assigned to a Step in a Catalog, by default each member of the group will receive email each time a Request enters that Step.

An individual will receive no more than one email message for a given Step. The format depends on the settings specified in the User Profile, which the User or an Administrator can update.

A separate email is sent for each Email Type, listing only users receiving that Email Type. If you have two or more usernames each with the same email address and different email types, you will receive an email for each email type.

The User Add/Edit screens for Administrators control whether a User can change their email settings. This option works in conjunction with permissions at the Step assignment level so that a User can control email generation only if allowed to do so in BOTH their User Profile and in the Step assignment. The following shows the Users screen accessed from User Management/Users..

Navigation: Configuration->User Management->Users->Add  
 Navigation: Configuration->User Management->Users->Edit

Figure 5.1 - Add/Edit User

The screenshot shows the 'Add/Edit User' form in the Request Management System. The form is titled 'Add/Edit User' and is part of the 'Configuration' section. The form includes the following fields and options:

- First Name**: Required field (marked with an asterisk).
- Last Name**: Required field (marked with an asterisk).
- Email**: Required field (marked with an asterisk).
- Telephone**: Required field (marked with an asterisk).
- User Name**: Required field (marked with an asterisk).
- Password**: Required field (marked with an asterisk), must be at least 7 characters.
- Confirm Password**: Required field (marked with an asterisk).
- Format Date**: Radio buttons for USA (mm/dd/yyyy) and English (dd/mm/yyyy).
- Email Notification**: Radio buttons for HTML and Text.
- Long/Short Emails**: Radio buttons for Long and Short.
- Allow Email On/Off**: Radio buttons for Yes and No.
- Active**: Radio buttons for Yes and No.

At the bottom of the form, there is a legend for the asterisk (\*) indicating required fields, and two buttons: 'Save' and 'Cancel'. The footer of the page reads: '© 2002-2006 IT OnTime, Inc. All rights reserved. rm<sup>s</sup> is a trademark of ITOnTime, Inc.'

The form for ADSI Users is different in that administrators cannot change the identification and login credentials from within rm<sup>s</sup>. Otherwise, the email controls work identically.

If Allow Email On/Off is set to Yes, then users control their own email. If set to No, then only Administrators can change the email settings for all Steps.

As a default, a Request owner will receive *Request Creator Email* each time their Request enters a workflow Step, allowing them to track Request progress.

The Request Creator and Administrators (except User Administrators) receive email when the Request is completed or canceled.

Multiple Users can share the same email address. Only one email will be sent to each address for a given email type. Multiple names may appear in the addressee list.

### Email Control Summary:

Email	Comments	Administrators Control	Users Control
<b>Step</b>	Key mechanism in alerting parties that a Request awaits attention.	Administrator can specify whether a User will receive email and whether the User can suppress emails.	Email On/Off if permitted in their User profile and the Step Permissions.
<b>Cancellation</b>	Generated when a Request is canceled.	N/A	N/A
<b>Completion</b>	Generated when a Request is completed.	N/A	N/A
<b>Request Creator</b>	Mechanism to keep the Request owner informed of the status of their Requests.	N/A	Request Creator Email On/Off button allows control at the Step level if permitted in their User profile

For information on Email controls, see the rm<sup>s</sup> User's Manual.





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## 6 Templates

### Definitions:

Template – A set of steps and fields that are automatically incorporated into a Form when creating a new Form.

### Concepts:

IT OnTime provides several Templates for use in defining new Forms. A System Administrator can define Templates or modify those provided. The use of Templates speeds the definition of new Forms. Since Templates span Service Catalogs, they can be modified only by a *System Administrator*.

### Business Rules and Defaults:

Form Templates permit the definition of the Request Creation form fields, Steps, workflow and Field Types.

Specific Field Type Templates permit definition of commonly used items such as Departments, Titles, Managers as well as Priority items.

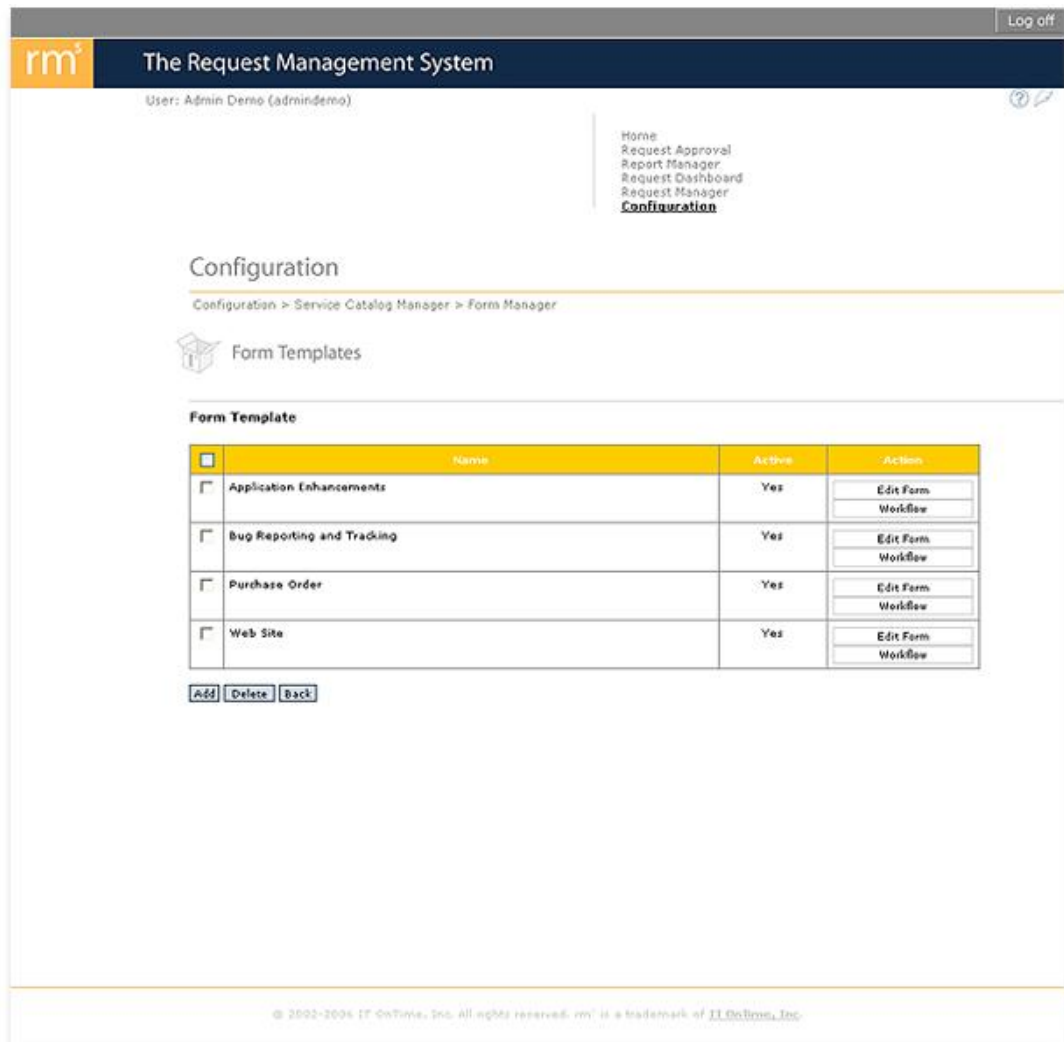
If a Template is changed, all new Forms created in that rm<sup>s</sup> instance using that Template will use the updated template. Previously created Forms are not affected.

### Form Template Control: (System Administrators Only)

Templates are changed via Templates on the Configuration Screen. There are two types of Templates, Form Templates and Field Type Templates. Screens for editing Templates are identical to the screens described in [Service Catalogs and Forms](#) for the same functions.

Navigation: Configuration->Templates->Form Templates

Figure 6.1 - Form Templates



The screenshot displays the 'Form Templates' page within the Request Management System. The page header includes the 'rm' logo, the system name 'The Request Management System', and the user 'Admin Demo (admindemo)'. A navigation menu on the right lists 'Home', 'Request Approval', 'Report Manager', 'Request Dashboard', 'Request Manager', and 'Configuration'. The main content area shows the breadcrumb 'Configuration > Service Catalog Manager > Form Manager' and a 'Form Templates' section with a table of existing templates. Below the table are 'Add', 'Delete', and 'Back' buttons. The footer contains the copyright notice: '© 2002-2006 IT OnTime, Inc. All rights reserved. rm is a trademark of IT OnTime, Inc.'

<input type="checkbox"/>	Name	Active	Action
<input type="checkbox"/>	Application Enhancements	Yes	Edit Form Workflow
<input type="checkbox"/>	Bug Reporting and Tracking	Yes	Edit Form Workflow
<input type="checkbox"/>	Purchase Order	Yes	Edit Form Workflow
<input type="checkbox"/>	Web Site	Yes	Edit Form Workflow

To add a new Template, click the Add button. To edit an existing Form Template, click on the Edit button.



Navigation: Configuration->Form Templates->Add  
Navigation: Configuration->Form Templates->Edit

### Form 6.2 - Add/Edit Form Template

The screenshot shows a web interface titled "Configuration". Below the title is a breadcrumb trail: "Configuration > Service Catalog Manager > Form Manager". There is a button with a document icon labeled "Add/Edit Form". Below this is a section titled "Edit Form" containing a table with three rows:

Name	<input type="text"/>
Allow Sub-Workflow?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Active?	<input checked="" type="radio"/> Yes <input type="radio"/> No

At the bottom of the form are two buttons: "Save" and "Cancel".

Supply a descriptive name for this Form Template. If you are editing the Form Template, you can make it unavailable in the future by clicking on the Active?/No radio button.

Once you have added the Form Template, click the Workflow button. You will see the Workflow definition tool. It works exactly as Workflow in the [Service Catalogs and Forms](#) section of this manual. Workflow Templates cannot define Common Forms.


### Field Type Template Control: (System Administrators Only)

Navigation: Configuration->Templates->Field Type Templates

Figure 6.3 - Field Type Templates

## Configuration

Configuration > Field Type Manager



### Field Type Templates

#### Field Type Manager

<input type="checkbox"/>	Name	Items	Type	Active	Action
<input checked="" type="checkbox"/>	Priority	1. Low 2. Normal 3. High 4. Urgent	Radio	Yes	<input type="button" value="Edit"/> <input type="button" value="Items"/>
<input type="checkbox"/>	Request Type	1. Menu 2. Graphic 3. Page 4. Behavior 5. Font, Color, Sound 6. Other	CheckBox	Yes	<input type="button" value="Edit"/> <input type="button" value="Items"/>
<input type="checkbox"/>	Cities	1. Tokyo 2. Bangkok 3. Singapore 4. Saigon	CheckBox	Yes	<input type="button" value="Edit"/> <input type="button" value="Items"/>


To add a new Template, click the Add button. To edit an existing Field Type Template, click on the Edit button.

Navigation: Configuration->Field Type Templates->Add  
 Navigation: Configuration->Field Type Templates->Edit

**Form 6.4 - Add/Edit Field Type Template**

Configuration

Configuration > Field Type Manager > Choice

 Field Type Templates

**Field Type Manager**

**Edit Field Type**

Name	<input type="text"/>
Type	<input checked="" type="radio"/> Radio <input type="radio"/> Check Box <input type="radio"/> Combo Box
Active	<input type="radio"/> Yes <input checked="" type="radio"/> No

Supply a descriptive name for this Field Type Template. If you are editing the Field Type Template, you can make it unavailable in the future by clicking on the Active Yes/No radio button.

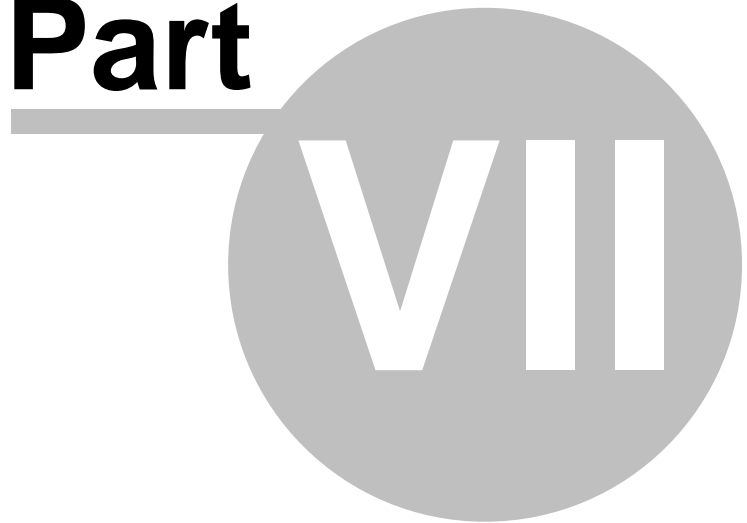
Once you have added the Field Type Template, click the Items button. You will see a Field Type item definition tool. It works exactly as the same tool in the [Field Type Manager](#) section of this manual



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## 7 Active/Inactive

### Concepts:

A number of different objects in rm<sup>s</sup> can be flagged as either active or inactive. Active objects are full participants in rm<sup>s</sup> functions. Inactive objects are in some way limited as participants in rm<sup>s</sup> functions. For example, a user flagged as inactive cannot log onto the system.

Flagging an object as inactive keeps a full history for the object. It is generally better to flag objects as inactive instead of deleting them.

### Business Rules and Defaults:

Users, Catalogs, Steps, Request Types, Priorities, Groups, Teams, and Field Types can be flagged as either Active or Inactive. The following table shows the effect of making an item Inactive.

Object	Default	Limitation if Inactive
User	Active	User cannot log on
Catalog	Active	Will not appear on the "Your Catalog List" for Users. Will be selectable for historical reporting.
Form	Active	Will not appear on the "Your Catalog List" for Users. Will be selectable for historical reporting.
Request Creation Form Field	Active	Will no longer appear when new Requests are created. Will appear in historical reporting for Requests created when the field was active.
Step	Active	Will not appear in any workflow for new requests or requests in process. Will appear in historical reporting for Requests approved for this Step while it was active.
Request Type	Active	Does not appear as a field when new Requests are created. Will appear in historical reporting for Requests specifying Request Type.
Group	Active	Group membership cannot be changed. Group assignments are revoked.
Team	Active	Team membership cannot be changed. Teams do not function.
Field Type	Active	Does not appear as a selectable value when new Forms are created. Will appear in historical reporting for Forms using the Field Type. Fields using this Field Type will become Inactive.
Template	Active	Will no longer be available when defining new Forms or Field Types. Existing Forms are unaffected.

### Active/Inactive Control:


This property is set via an "Active – Yes/No" radio button on screen that define or edit the object.

The value of the property is displayed in object lists, such as the Service Catalog Manager list from Service Catalogs and Forms.

Figure 7.1 - Example of a Display with Active and Inactive Items

Configuration

Configuration > Service Catalog Manager > Form Manager

 Form Manager

**Form(s) for Test Catalog**

<input type="checkbox"/>	Name	Active	Action
<input type="checkbox"/>	Catalog	Yes	<input type="button" value="Edit"/> <input type="button" value="Workflow"/> <input type="button" value="User Assignment"/> <input type="button" value="Workflow Exceptions"/> <input type="button" value="Junction Form"/>
<input type="checkbox"/>	Common form1 ( Common Form )	Yes	<input type="button" value="Edit"/> <input type="button" value="Workflow"/> <input type="button" value="User Assignment"/> <input type="button" value="Junction Form"/>
<input type="checkbox"/>	Demo Form	No	<input type="button" value="Edit"/> <input type="button" value="Workflow"/> <input type="button" value="User Assignment"/> <input type="button" value="Workflow Exceptions"/> <input type="button" value="Junction Form"/>
<input type="checkbox"/>	Testing Checking List V10	No	<input type="button" value="Edit"/> <input type="button" value="Workflow"/> <input type="button" value="User Assignment"/> <input type="button" value="Workflow Exceptions"/> <input type="button" value="Junction Form"/>

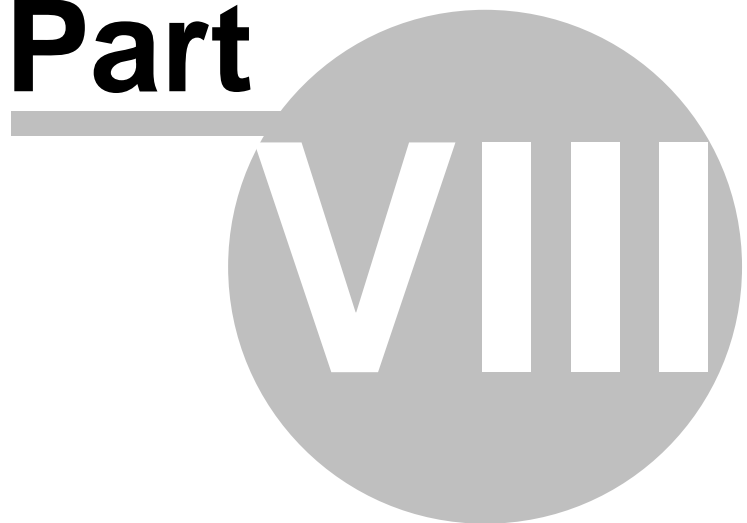




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## 8 System Configuration

Two of the four System Configuration items are rarely used after installing rm<sup>s</sup>. These are Database and Tools and Server Time Zone. Database Backup and Data Migration Wizards makes copies of the existing rm<sup>s</sup> database for backup or to change the rm<sup>s</sup> database server. Welcome Text controls the text displayed on the bottom left of the rm<sup>s</sup> main screen, immediately below the graphic. It can be used for system messages or any other information that the System Administrator wishes to display. System Configuration is limited to System Administrators.

Use any of these tools with great caution. They can destroy your rm<sup>s</sup> install if not used properly.

### 8.1 Database and Tools

#### Concepts:

Database and Tools is used to manage parameters of the rm<sup>s</sup> installation. You will first see this screen when installing rm<sup>s</sup>. You may change these parameters but you will also need to take actions outside of rm<sup>s</sup> when you do this.

#### Business Rules and Defaults:

rm<sup>s</sup> stores its data in a relational database. The demo or evaluation version only uses Microsoft® Access to store data. Licensed version provide the option of Oracle® database, Microsoft® SQL Server or Microsoft Access.

rm<sup>s</sup> requires one writeable folder for storing uploaded files. You will be specifying this.

#### Database and Tools: (System Administrators Only)

You will see this screen when you start rm<sup>s</sup> for the first time or when you go to Configuration/ System Configuration and click on Database and Tools.

Navigation: Configuration->System Configuration->Database and Tools

Figure 8.1 Database and Tools

The screenshot shows the 'rms' logo and 'The Request Management System' header. The user is 'Admin Demo (admindemo)'. A navigation menu includes Home, Request Approval, Report Manager, Request Dashboard, Request Manager, and Configuration. The main content area is titled 'Configuration' and 'Database and Tools'. It contains three main sections: 'Database', 'File Upload Directory', and 'Email Tools'. The 'Database' section has three radio buttons: 'Oracle', 'MS SQL Server 2000 and higher' (selected), and 'MS Access Database'. The 'MS SQL Server' section has fields for 'Server Name' (10.1.1.10), 'Username' (sa), 'Password' (\*\*\*\*\*), and 'Database Name' (RMS203). The 'MS Access Database' section has a 'Database File Name' field (RmsSystem.Mdb). The 'File Upload Directory' section has a 'Path' field (http://rms2sql/UploadFiles/). The 'File Upload Tools' section has two radio buttons: 'ASP Upload 3.0 Component Tools' and 'Upload Script Tools' (selected). The 'Email Tools' section has fields for 'Email host name' (mail.it-ontime.com), 'User', and 'Password', and three radio buttons: 'ASP Email Component Tools', 'CDOSYS Email Tools (Windows 2000, Windows XP, Windows 2003)', and 'CDont Email Tools (Windows NT 4 and Windows 2000)' (selected). At the bottom are 'Save' and 'Cancel' buttons. A footer contains the copyright notice: '© 2004-2006 IT OnTime, Inc. All rights reserved. rms is a trademark of IT OnTime, Inc.'

In the Database group of fields, click the radio button next to the database you wish to use. Fill in all the information.

The File Upload Directory field contains the IIS server path of the writeable directory for storing uploaded files. Remember, this is the Web server path and not the operating system path.

Field Upload lets you choose the component for uploading files. rm<sup>s</sup> supports ASP Upload 3.0 or higher from Persits Software. If this is installed on your server, you may use it. Otherwise, rm<sup>s</sup> contains upload scripts to support file uploading.

Email Tools lets you choose the email component that you are using. rm<sup>s</sup> support ASP Mail from Persits Software. If this is installed on your server, you may use it. Otherwise, rm<sup>s</sup> will use the CDOSYS or CDONTS email tools. CDOSYS is available in Windows 2000 and higher. CDONTS is available in Windows NT 4 and Windows 2000.

After making your selections, select Save.

Here are several cautions if you change the database or writeable directory settings.

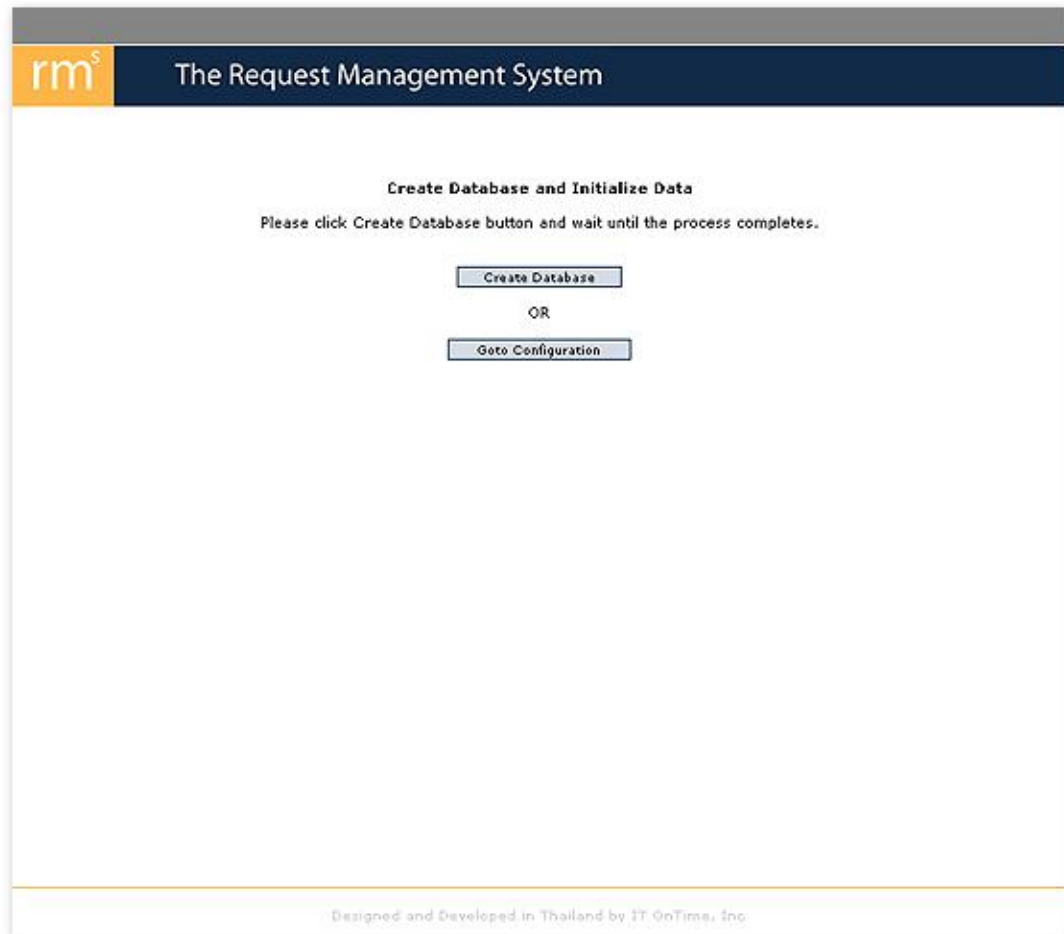
1. You will need to migrate the contents of your previous rm<sup>s</sup> database. If you do not, you will lose all previous Catalogs, Forms and Requests. Use [Database Backup and Data Migration Wizards](#) to do this.
2. If you change the writeable directory, you will lose access to all files uploaded to rm<sup>s</sup> as well as all as previous settings for these items. Make sure to move the contents of the previous upload directory.
3. If you make either change described above and you cannot get rm<sup>s</sup> to work, immediately contact IT OnTime before further damaging your installation.

You can change File Upload or Email Tools at any time as long as the components you wish to use are available on the server.

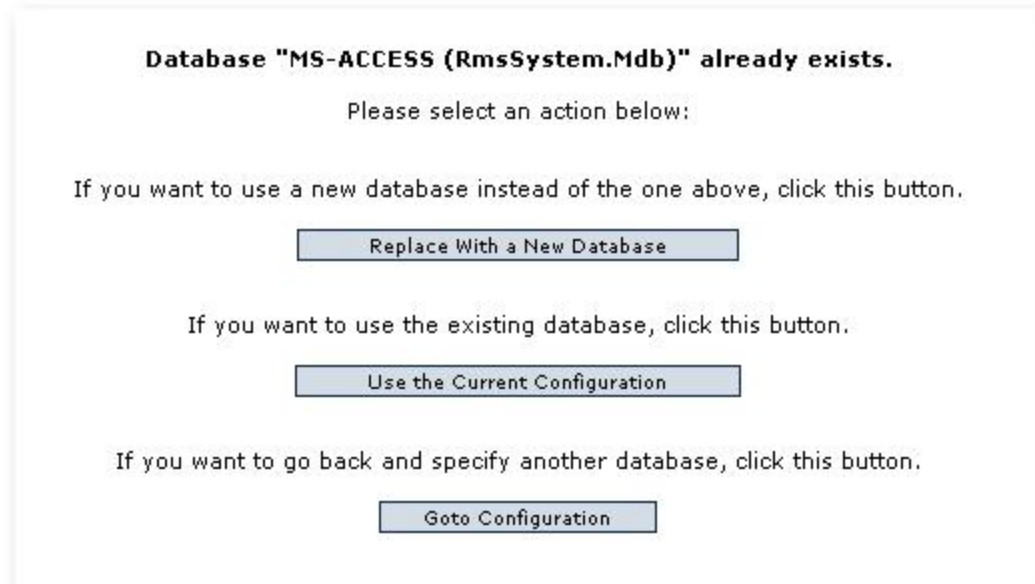
### Changing the rm<sup>s</sup> Database

If you decide to change the rm<sup>s</sup> database, you need to first migrate the data to the new database. Use [Database Backup and Data Migration Wizards](#) to do this. If you change the database and it does not exist already, you will see the following screen.

Figure 8.2 - Create Database and Initialize Data



Use this screen with great caution. If you select Create Database, rm<sup>s</sup> will create the new database specified. This database **will not contain** your previous data. If you do not want to do this, click the Goto Configuration button and restore the previous database name. After doing this, you will see the following screen.

**Figure 8.3 - Select Database Action**

If you click the Replace With a New Database button, your original data will be overwritten and replaced by a blank rm<sup>s</sup> database. **You will lose all previous entries.** If click the Use the Current Database button, you will resume using your previous database with no changes. In either case, your rm<sup>s</sup> session will end and you will need to login again. If you click the Goto Configuration button, you will return to the screen in Figure 9.1.

## 8.2 ADSI Server Configuration

### Definitions:

ADSI - The Microsoft programmatic interface to Active Directory.

Active Directory - The Microsoft version of LDAP (Light Directory Access Protocol).

### Concepts:

In Microsoft® Windows Server 2000 and higher, User and Group information may be stored in a repository called the Active Directory. This directory can be read through an interface called ADSI. If you are running rm<sup>s</sup> in an environment with an Active Directory, you can save work by reading Users and Groups directly into rm<sup>s</sup> from the Active Directory instead of defining new Users just for rm<sup>s</sup>. rm<sup>s</sup> will then use the network username and password to authenticate the User.

To use ADSI for rm<sup>s</sup>, your organization must purchase a license that includes this feature. Once installed, a network user with permission to access ADSI must set up a connection between rm<sup>s</sup> and ADSI. If you do not have a license for this feature, the ADSI Server Configuration menu item will be absent from the Configuration page.

### **Business Rules and Defaults:**

Once connected to ADSI, the connection is re-established automatically for each rm<sup>s</sup> session.

Only System Administrators can access ADSI Server Configuration.

Activating this feature requires that you know the name or IP address of an ADSI server on your network. You must know the port for accessing ADSI. The default is 389 but it may be different on your network. You will need a username and password that has rights to access the Active Directory through ADSI.

### **ADSI Server Configuration: (System Administrators Only)**


To connect to your network's Active Directory, click ADSI Server Configuration under System Configuration. The following screen will not appear.

*Navigation: Configuration->System Configuration->ADSI Server Configuration*

*Figure 8.5 - ADSI Server Configuration - Initial State*

**Configuration**

Configuration > Server Configuration

 **Server Configuration**

---

**ADSI Server Configuration**

**ADSI Server Connection**

Status : **Disconnected**

Until : [From 9/28/2005 15:51 To Now](#)

User Notification : [No Email Notifications](#)

**ADSI Server Parameter**

ADSI Server IP Address :

LDAP Port : ( Default : 389 )

Admin User :

Admin Password : \*\*\*\*\*

The screen contains two areas. The top area is the current Connection Status. The bottom contains the ADSI Server parameters. To input connection information, click on the Edit button. You will now see this screen.

*Navigation: Configuration->System Configuration->ADSI Server Configuration->Edit*

*Figure 8.6 - ADSI Configuration*



## Configuration

Configuration > Server Configuration



### Server Configuration

#### ADSI Server Configuration

**ADSI Server**

ADSI Server IP Address :

LDAP Port :  ( Default : 389)

Admin User :

Admin Password :

The screen requires four (4) entries. The first is the name or IP address of the server offering the connection to ADSI. The second is the port for the connection. The third is the network username of a user authorized to access ADSI. The fourth is that user's password. After filling out the form, click the Save button.

To connect to the ADSI server, click the Connect button shown in Figure 8.5.

If an error occurs while connecting to ADSI, you will see a screen similar to the following screen.

#### *Figure 8.7 - ADSI Error*

## Configuration

Configuration > Server Configuration



### Server Configuration

---

#### ADSI Server Configuration

**Error:** • ( Cannot connect to the server(10.1.1.105) with port 389 )

ADSI Server	
ADSI Server IP Address :	<input type="text" value="10.1.1.105"/>
LDAP Port :	<input type="text" value="389"/> ( Default : 389 )
Admin User :	<input type="text" value="Administrator"/>
Admin Password :	<input type="password" value="●●●●●●●●"/>

As is the case with most security sensitive operations, only vague information about the problem is available. If you need help, please contact your Help Desk or network administrator. IT OnTime does not have this information.

If you no longer wish to maintain the connection between your Active Directory and rm<sup>s</sup>, click the Disconnect Button. You will asked to confirm this operation. ADSI Users and Groups will no longer be able to log into rm<sup>s</sup>.


*Navigation: Configuration->System Configuration->ADSI Server Configuration*

Figure 8.8 - ADSI Server Configuration - Connected

The screenshot displays a web-based configuration interface. At the top, the title 'Configuration' is shown, followed by a breadcrumb trail 'Configuration > Server Configuration'. Below this is a 'Server Configuration' section with a server icon. The main content area is titled 'ADSI Server Configuration' and contains two panels. The first panel, 'ADSI Server Connection', shows the status as 'Connected' in green, a duration of 'From 9/14/2005 17:00 To Now', and user notification emails: 'maxr@it-ontime.com;maxsros@earthlink.net'. The second panel, 'ADSI Server Parameter', lists: 'ADSI Server IP Address : it-ontimehqs1', 'LDAP Port : 389 ( Default : 389 )', 'Admin User : Administrator', and 'Admin Password : \*\*\*\*\*'. At the bottom of this panel are 'Edit' and 'Disconnect' buttons. A 'Back' button is located at the bottom left of the main configuration area.

**Configuration**

Configuration > Server Configuration

 **Server Configuration**

**ADSI Server Configuration**

**ADSI Server Connection**

Status : **Connected**

Duration : From 9/14/2005 17:00 To Now

Users Notification : maxr@it-ontime.com;maxsros@earthlink.net

**ADSI Server Parameter**

ADSI Server IP Address : it-ontimehqs1

LDAP Port : 389 ( Default : 389 )

Admin User : Administrator

Admin Password : \*\*\*\*\*

In the window shown above, you will see two entries: Duration and User Notification. Duration shows the length of the current connection. If you click on the duration information, a screen will open showing the connection history. The following is a sample.

*Navigation: Configuration->System Configuration->ADSI Server Configuration->Duration Information*

Figure 8.8 - ADSI Server Connection History

ADSI Connection Log			
Date	Status	User	ADSI Server
7/19/2006 15:25	Connected	Admin Demo (admindemo)	10.1.1.199:389
7/19/2006 15:25	Not connected	Admin Demo (admindemo)	10.1.1.199:389
7/19/2006 10:35	Connected	Admin Demo (admindemo)	10.1.1.199:389
7/19/2006 09:47	Not connected	Admin Demo (admindemo)	10.1.1.199:389
7/17/2006 12:10	Connected	User Demo (userdemo)	10.1.1.199:389
7/17/2006 10:26	Not connected	User Demo (userdemo)	10.1.1.199:389
7/10/2006 10:54	Connected	Khanokwan (some)	10.1.1.199:389
7/10/2006 10:11	Not connected	Admin Demo (admindemo)	10.1.1.199:389
7/3/2006 11:01	Connected	Khanokwan (some)	10.1.1.199:389
6/30/2006 13:45	Not connected	Khanokwan (some)	10.1.1.199:389
6/28/2006 10:37	Connected	Khanokwan (some)	10.1.1.199:389
6/28/2006 10:29	Not connected	Khanokwan (some)	10.1.1.199:389
6/27/2006 11:09	Connected	Khanokwan (some)	10.1.1.199:389
6/27/2006 09:49	Not connected	Rms System Admin (rmsadmin)	10.1.1.199:389
6/22/2006 11:45	Connected	Khanokwan (some)	10.1.1.199:389
6/22/2006 09:02	Not connected	Khanokwan (some)	10.1.1.199:389
6/21/2006 11:20	Connected	Rms System Admin (rmsadmin)	10.1.1.199:389
6/21/2006 10:33	Not connected	Rms System Admin (rmsadmin)	10.1.1.199:389
6/20/2006 13:05	Connected	Rms System Admin (rmsadmin)	10.1.1.199:389
6/20/2006 09:21	Not connected	Rms System Admin (rmsadmin)	10.1.1.199:389

Total 25 Records Page: | 1 | 2 |

The table reads from newest information on the top of Page 1 to oldest information.

The User Notification contains a comma separated list of email addresses. The recipients are notified when the ADSI connection breaks. Enter email address by click on the input area or any of the addresses in the area. You will see the following screen.

*Navigation: Configuration->System Configuration->ADSI Server Configuration->User Notification Information*

Figure 8.9 - ADSI User Notification



## 8.3 Database Backup and Data Migration Wizards

### Concepts:

Database Backup and Data Migration Wizard copies rm<sup>s</sup> data stores.

Copies can be between databases that rm<sup>s</sup> supports. Because of datatype differences, rm<sup>s</sup> can only copy an Oracle database to another Oracle database.

### Business Rules and Defaults:

rm<sup>s</sup> stores its data in a relational database. Microsoft® Access is the data store for the demo or evaluation version. Licensed versions provide the option of Oracle® database, Microsoft® SQL Server or Microsoft Access as the data store.

You must have a username and password with sufficient permissions to write to the target database.

You must have a username and password with sufficient permissions to read the source database.

Database Backup and Data Migration Wizard only works on rm<sup>s</sup> databases. It is not a general utility for copying databases.

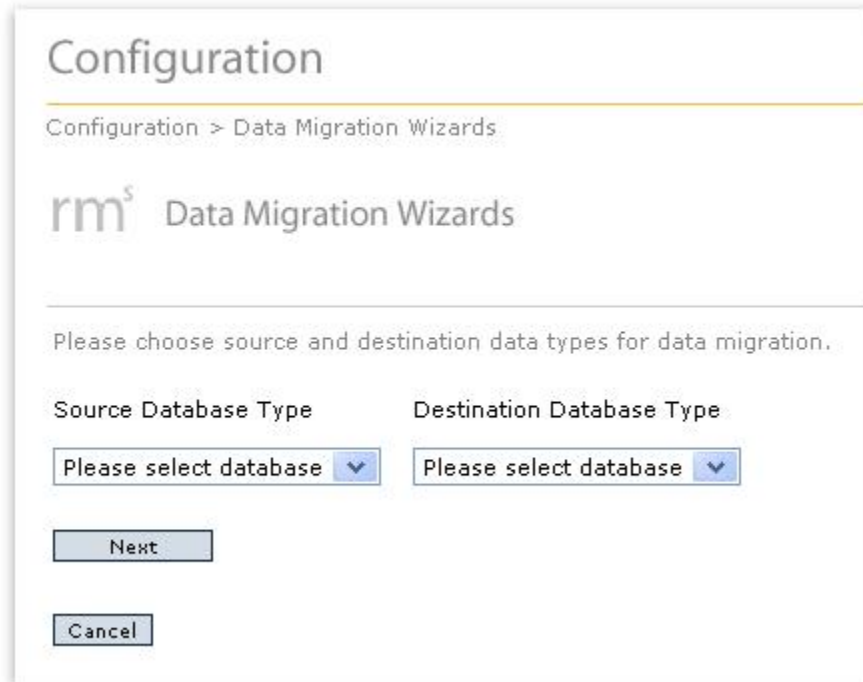
### Database Backup and Data Migration Wizard: (System Administrators Only)

To access Database Backup, go to the Configuration screen by click on Configuration on any rm<sup>s</sup> screen. In the System Configuration grouping, you will see Database Backup and

Migration Wizard. After clicking on that item, you will see the following screen.

*Navigation: Configuration->System Configuration->Database Backup and Migration Wizards*

**Figure 8.10 - Data Migration Wizards**



The screen has two drop down lists and two buttons. Click the Please select database under the Source Database Type. You will see the list of available databases for your rm<sup>s</sup> license.

**Figure 8.11 - Database List**



Click on the correct source database type. Select the correct database type from the Target Database Type. Once you have done this, click the Next button. If you selected Microsoft Access as the source database type and Microsoft SQL Server as the target database type, you will see a screen like this one.

**Figure 8.12 - Microsoft Access to Microsoft SQL Server**

**Configuration**

Configuration > Data Migration Wizards

**rm<sup>s</sup> Data Migration Wizards**

---

**Data Migration Wizards**

**Source Database**  
MS Access Database

*Database File Name:*

**Destination Database**  
MS SQL Server 2000 and higher

*Server Name:*

*Username:*

*Password:*

*Database Name:*

Under the heading Source Database, you will see that its type is Microsoft Access. Directly below that entry, you will see a path to the database and a text box. The path for Microsoft Access databases is always the `http://<URL>/rms instance name/Upload Files/DB_files/`. Specify the name of the database you wish to backup or migrate. If the current database is an Access database, the database name is available on the Database and Tools screen. See the previous section, [Database and Tools](#) for help in finding that entry.

Once you enter the name, you can check to see if it is correct by clicking the Test Connection button. If the connection is successful, you will see the following in a pop up.

**Figure 8.13 - Successful Connection**



If the screen contains an error similar to the following screen, check to make sure the database name is correct.

*Figure 8.14 - Unsuccessful Microsoft Access Connection*



For Microsoft SQL Server, use the radio button group to select the Authentication method and then fill in the four entries. The first is the name of SQL Server instance where the database resides. You can enter either the name or the IP address. Enter the username and password of someone with sufficient administrative rights to manage the database. If the database is the source, you will need read access. If it is the target, you will need the ability to fully manage database objects. Enter the database name.

If the entries are correct, you will see the same screen as the one shown in Figure 8.13. If you are unsuccessful, you will see a screen similar to the one in Figure 8.15.

*Figure 8.15 - Unsuccessful Microsoft SQL Server Connection*

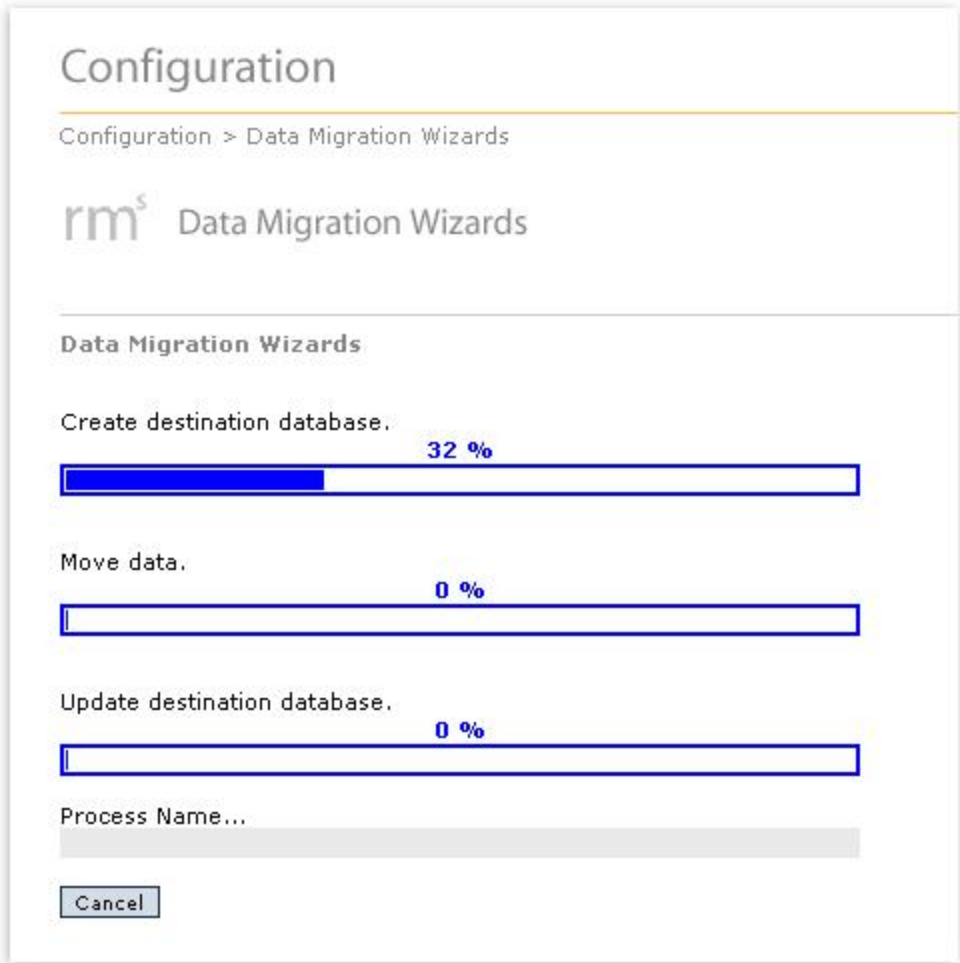




If your target database is a new Microsoft Access database, Test Connection will be unsuccessful. rm<sup>s</sup> will create the new database during the backup or migration operation.

Once you have successfully connected to your databases, click the Next button. This will begin the copy operations. You will see a screen similar to this one.

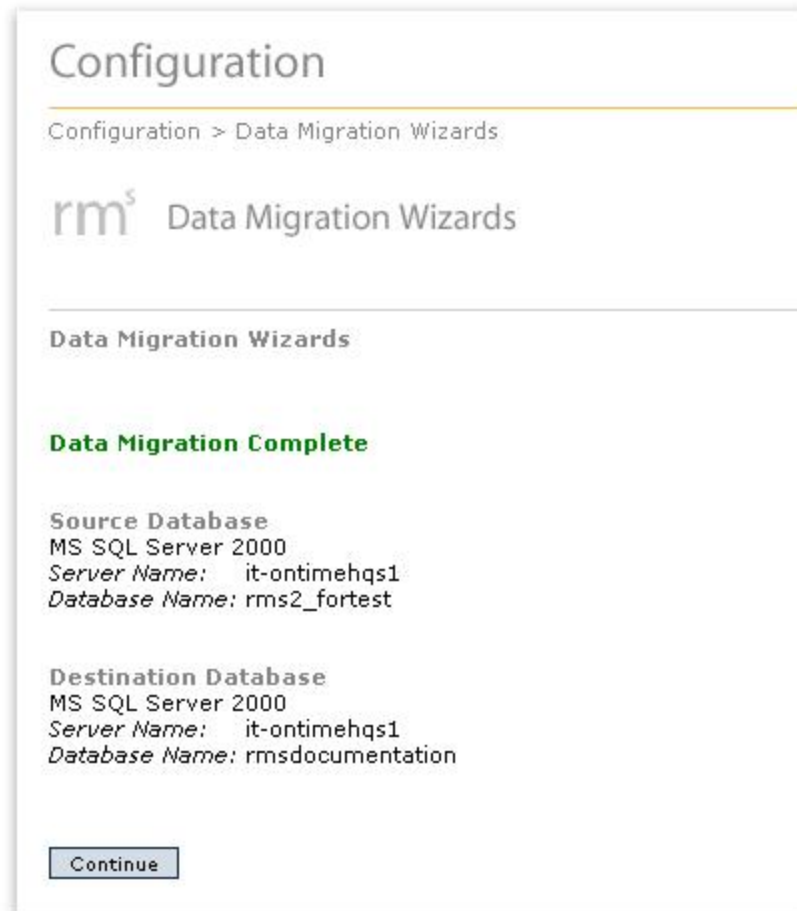
Figure 8.16 - Copy Operations In Progress



Once the copy operations are completed, the following screen will replace the previous

screen.

*Figure 8.17 - Successful Copy Operation Completed*



Click the Continue button. You will return to the screen shown in Figure 8.10. If you have completed all of your database backups or data migrations, click the Cancel button.

If the target database already contains valid rm<sup>s</sup> data, you will see the following screen.

*Figure 8.18 - Target Database Contains rm<sup>s</sup> Data*

**Configuration**

Configuration > Data Migration Wizards

**rm<sup>s</sup> Data Migration Wizards**

---

**Data Migration Wizards**

**Destination Database already exists.**

Please backup your data before continue the exist data will be replace by the source data.

OR

Click back button to specify another database.

If you wish to copy data over the existing data, click the Next button. You will go the screen similar to the one shown in Figure 8.18. If you wish to specify another target database name, click the Back button. You will go to screen similar to the one shown in Figure 8.12. If you wish to stop the operation while you research the situation or create a new database, click the Cancel button. You will go to the Configuration screen.

If you wish to connect to an Oracle database, you will need to supply the information shown in Figure 8.19.

**Figure 8.19 - Oracle Database Connection Information**

**Destination Database**

Oracle

*Service Name:*

*Username:*

*Password:*

Enter the name the database and the username and password of a user with sufficient rights to read or update the Oracle database. All other features previously described function identically.

## 8.4 Server Time Zone

### Concepts:

Server Time Zone specifies the current Time Zone of the server for rms.

### Business Rules and Defaults:

All new Service Catalogs start with the Server Time Zone setting set here. This can be overridden when setting up a new Service Catalog.

### Server Time Zone: (System Administrators Only)

To set the Server Time Zone, click on Server Time Zone under Configuration/System Configuration. You will see the screen shown below.

*Navigation: Configuration->Server Time Zone*

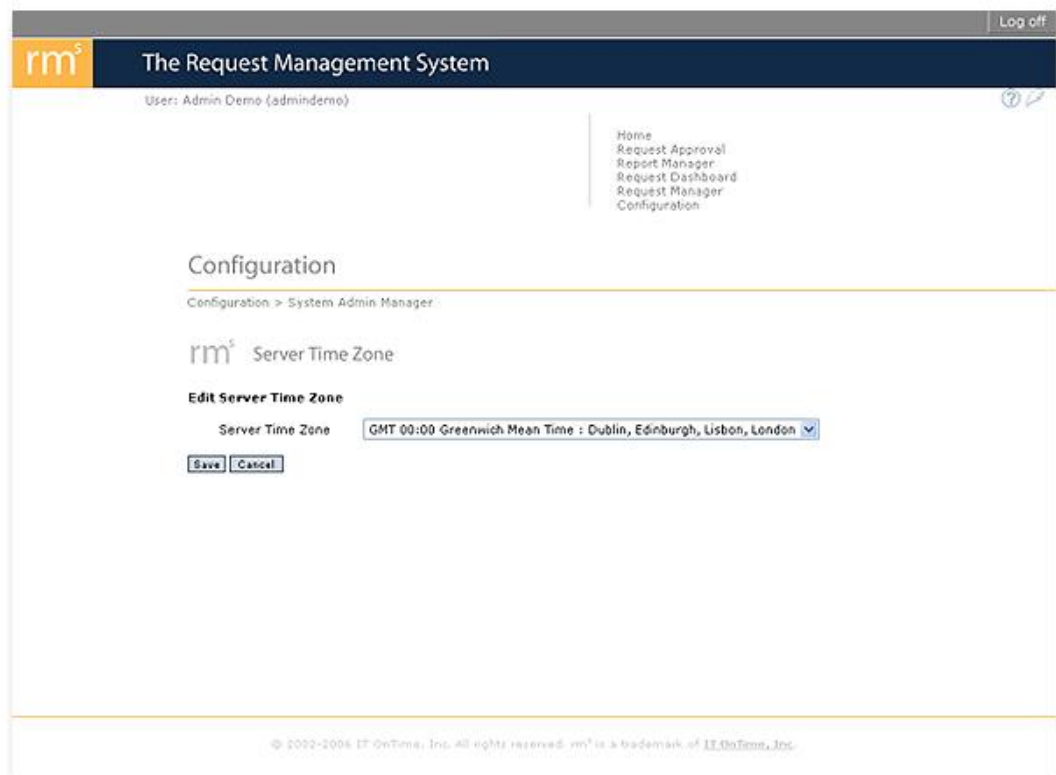
**Figure 8.20 - Server Time Zone**



To change the time zone, click the Edit button.

Navigation: Configuration->System Configuration->Server Time Zone->Edit

Figure 8.21 - Edit Server Time Zone



Pick the time zone that you wish to use from the combo box. Click the Save button.

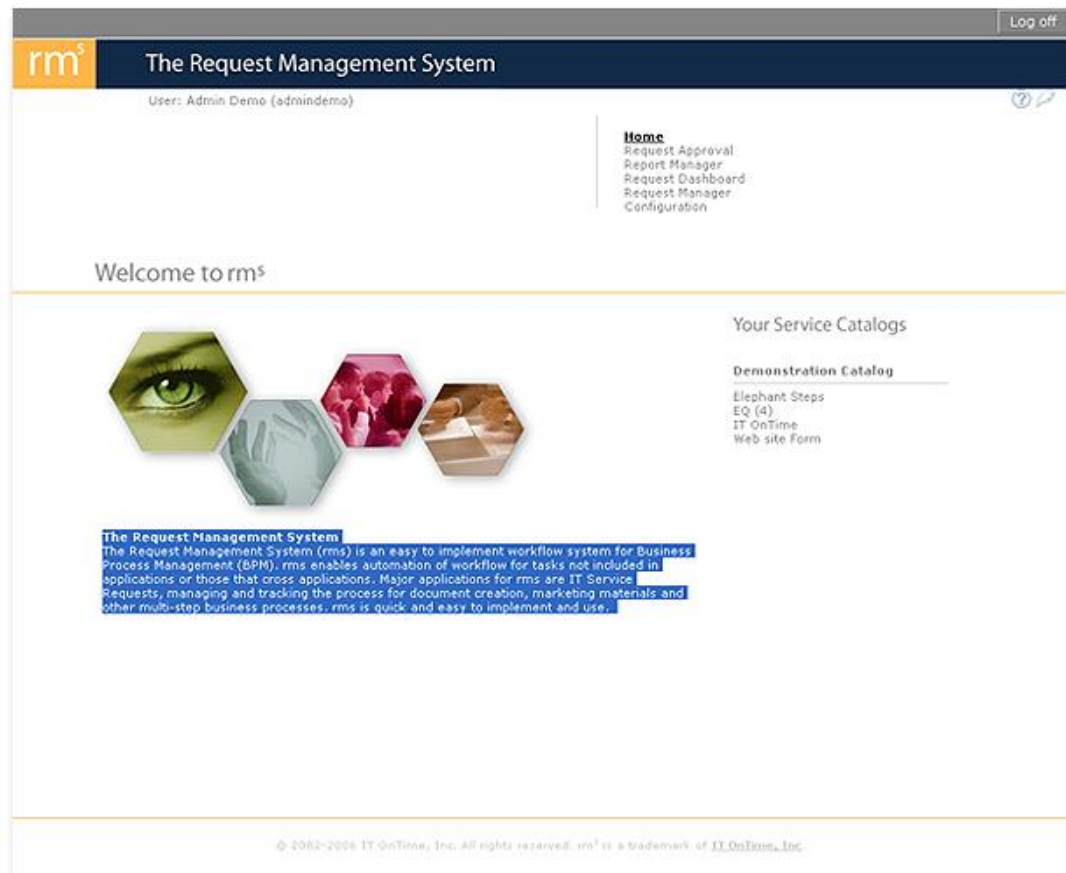
## 8.5 Welcome Text

### Concepts:

Welcome Text displays on the rm<sup>5</sup> main screen immediately below the graphic. The Title appears immediately above the graphic. Figure 8.22 highlights the as shipped Title and Welcome Text.

Navigation: Home

Figure 8.22 - As-Shipped rm<sup>s</sup> Title and Welcome Text Highlighted



### Business Rules and Defaults:

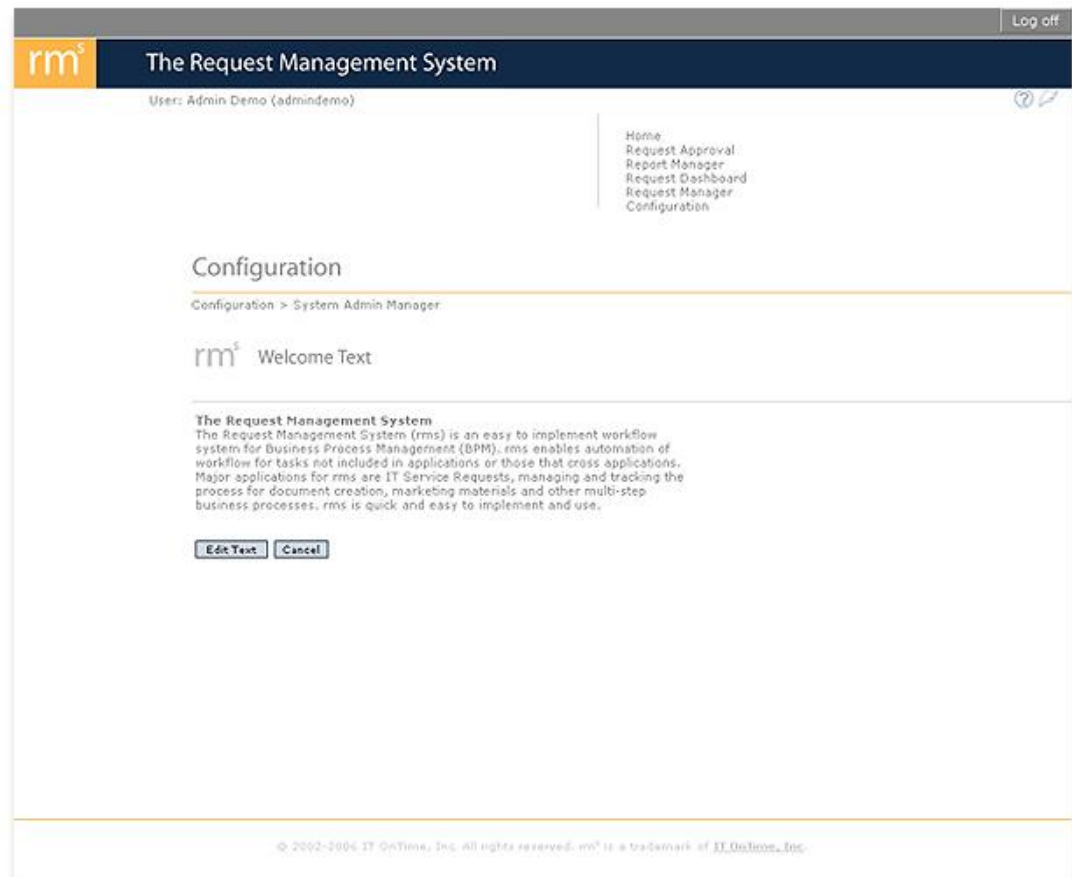
You may change the Title and Welcome Text any time that you wish. Welcome Text may contain any valid alphanumeric character as well as HTML tags.

### Welcome Text: (System Administrators Only)

Click on Welcome Text on Configuration/System Configuration. The screen in Figure 9.21 will now appear.

Navigation: Configuration->Welcome Text

Figure 8.23 - rm<sup>s</sup> Welcome Text



This screen displays the current Welcome Text as it will display on the main screen. To change the text, click the Edit Text button. The screen show in Figure 8.24 will display.

*Navigation: Configuration->Welcome Text->Edit*

**Figure 8.24 - Edit rm<sup>s</sup> Welcome Text**

## Configuration

---

Configuration > System Admin Manager

rm<sup>s</sup> Welcome Text

### Edit Rms Welcome Text

Title	<input type="text" value="The Request Management System"/>
Description	<div style="border: 1px solid #ccc; padding: 5px;"><p>The Request Management System (rms) is an easy to implement workflow system for Business Process Management (BPM). rms enables automation of workflow for tasks not included in applications or those that cross applications. Major applications for rms are IT Service Requests, managing and tracking the process for document creation, marketing</p></div>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

There are two fields Title and Welcome Text. Enter your changes into the field and then click the Save button. HTML formatting tags are allowed. You will see your new Title and Welcome Text on the Screen shown in Figure 8.23. If you click Home on the rm<sup>s</sup> navigation menu, you will see it display on the main page.





# Top Level Intro

This page is printed before a new  
top-level chapter starts

# Part



## 9 Request Dashboard

The Request Dashboard is a new feature in rm<sup>s</sup> Version 2.3. It provides a quick visual overview of Request status with the ability to drill down to see more detail. It is easy to use and provides for saved Dashboard views.

### Concepts:

The Request Dashboard provides a visual view of Requests Entered, Requests Completed, Requests in Process, Requests Canceled, Average Time to Complete all Completed Requests and Average Time in Process for All Requests. A Dashboard view can show this information for all Catalogs, selected Catalogs, All Forms in a Catalog and selected Forms in a Catalog. This graphs have hot spots for drilling down to more detailed information.

### Business Rules and Defaults:

When first accessing the Request Dashboard, the selection defaults to All Catalogs and All Forms.

Clicking on the name of the display (All Requests, All Catalogs, Catalog name, will drill down to the next detail level.

Click on a bar in the graph will display all Requests in that bar in a summary listing that can be printed.

System Administrators can view all Requests in the Request Dashboard. Project and Task Administrators can only see Requests in Catalogs where they are Project and Task Administrators.

### Request Dashboard: (System, Project and Task Administrators Only)

The Request Dashboard is accessible from the rm<sup>s</sup> main menu. It is the fourth item below Home, Request Approval and Report Manager. The Request Dashboard main screen is shown in the following figure.

Navigation: Request Dashboard

Figure 9.1 - Request Dashboard Main Screen



The screen has three areas for controlling the Dashboard display. The top area labeled Catalogs and Forms controls the scope of the display. Initially, all boxes are checked for System Administrators. Catalog and Task Administrators will see only those Catalogs where they are Administrators.

To change the scope of the selection, uncheck one or more of the boxes. To clear all selections, uncheck the Catalogs and Forms checkbox. Make selections by clicking the checkbox next to the name of any Catalog.

The second area controls the Request Creation dates included in the Dashboard display. To limit the date range included in the Dashboard display, click the radio button next to the word From. Enter the start of the date range in the first box and the end of the date range in the second box. You can use the Calendar tool to select the dates.

The last area controls the graphs displayed in the Request Dashboard. The definitions are:

Total Number of Requests Entered - Sum the number of Requests in all selected Catalogs and Forms and display a bar representing that sum.

Total Number of Currently Active Requests - Sum the number of Requests still active in all selected Catalogs and Forms and display a bar representing that sum.

Total Number of Completed Requests - Sum the number of Requests marked as completed in all selected Catalogs and Forms and display a bar representing that sum.

Total Number of Canceled Requests - Sum the number of Requests marked as Canceled in all selected Catalogs and Forms and display a bar representing that sum.

Average Time to Complete All Completed Requests - The average time that it took to finish all Requests.

Average Time in Process for All Requests - The average time that all Requests, In Process, Completed and Canceled have been in process.

Below this are two buttons:

Selection Management: Click this button to access the screen that provides the ability save and reload dashboard selection criteria.

View Request Dashboard - Opens the Request Dashboard displaying the combined result for all selected Catalogs and Forms applying the specifications entered.

*Navigation: Request Dashboard-> Selection Management*

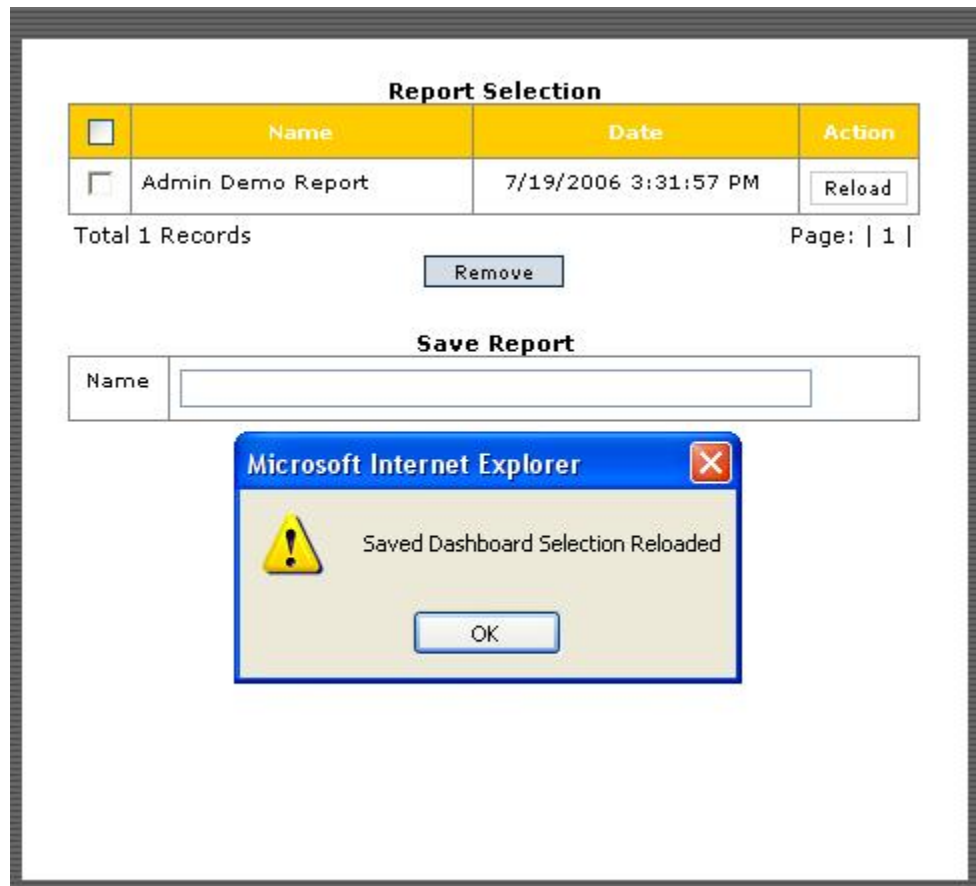
**Figure 9.2 - Selection Management**

The screenshot displays a web interface for managing dashboard selections. At the top, there is a section titled "Report Selection" with a yellow header bar containing a checkbox, "Name", "Date", and "Action" columns. Below this, a message states "No Record(s) Available" with a "Remove" button. The lower section is titled "Save Report" and features a "Name" label next to a text input field. Below the input field is a "Save Current Selection" button, and at the bottom center is a "Close" button.

This screen has two areas: the upper area shows all saved Dashboard selections for this user. The lower part has an entry field for creating new saved Dashboard specifications.

To use a saved specification, click the Reload button to right of the specification. The screen will now change to:

**Figure 9.3 - Successfully Loaded Dashboard Specification**



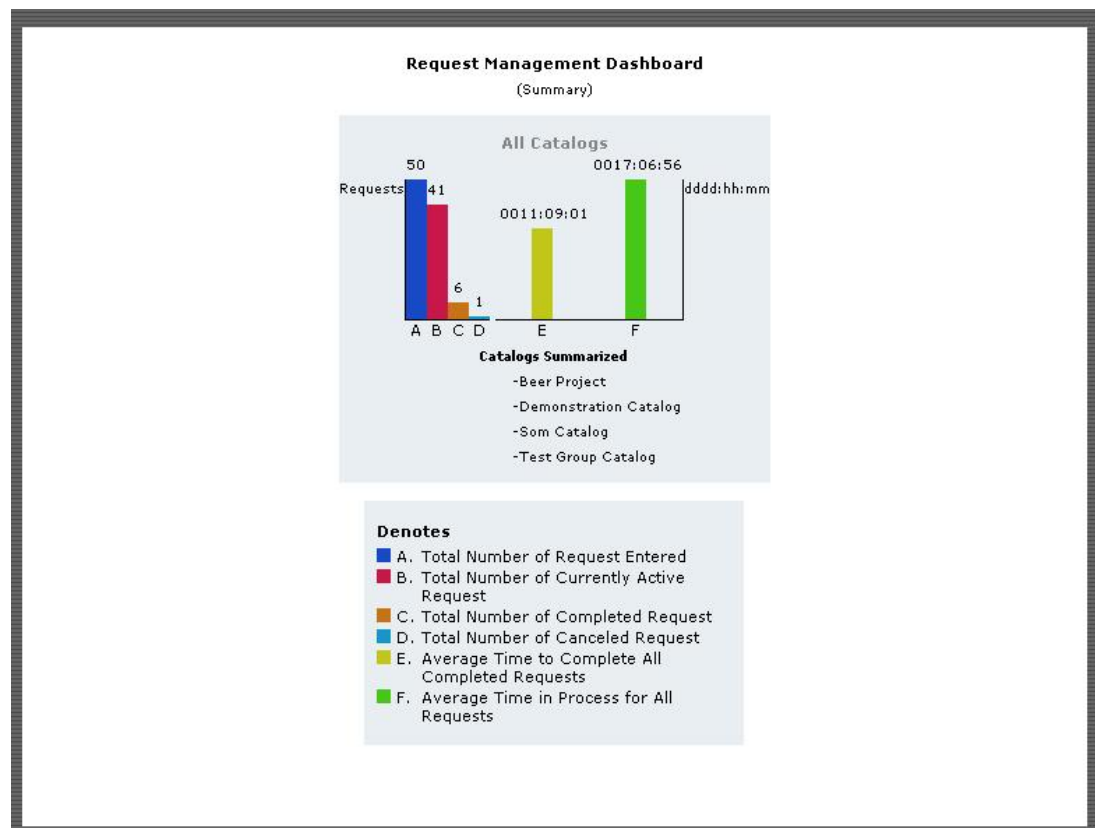
Click the OK button and then click the Close button. This will return you to the Dashboard Manager main screen.

To save a specification, fill in the name field. Names are acceptable file names for the operating system and browser. Click the Save Current Selection button. The list will now include the new saved specification.

To display the Request Dashboard applying the current specification, click the View Request Dashboard button.

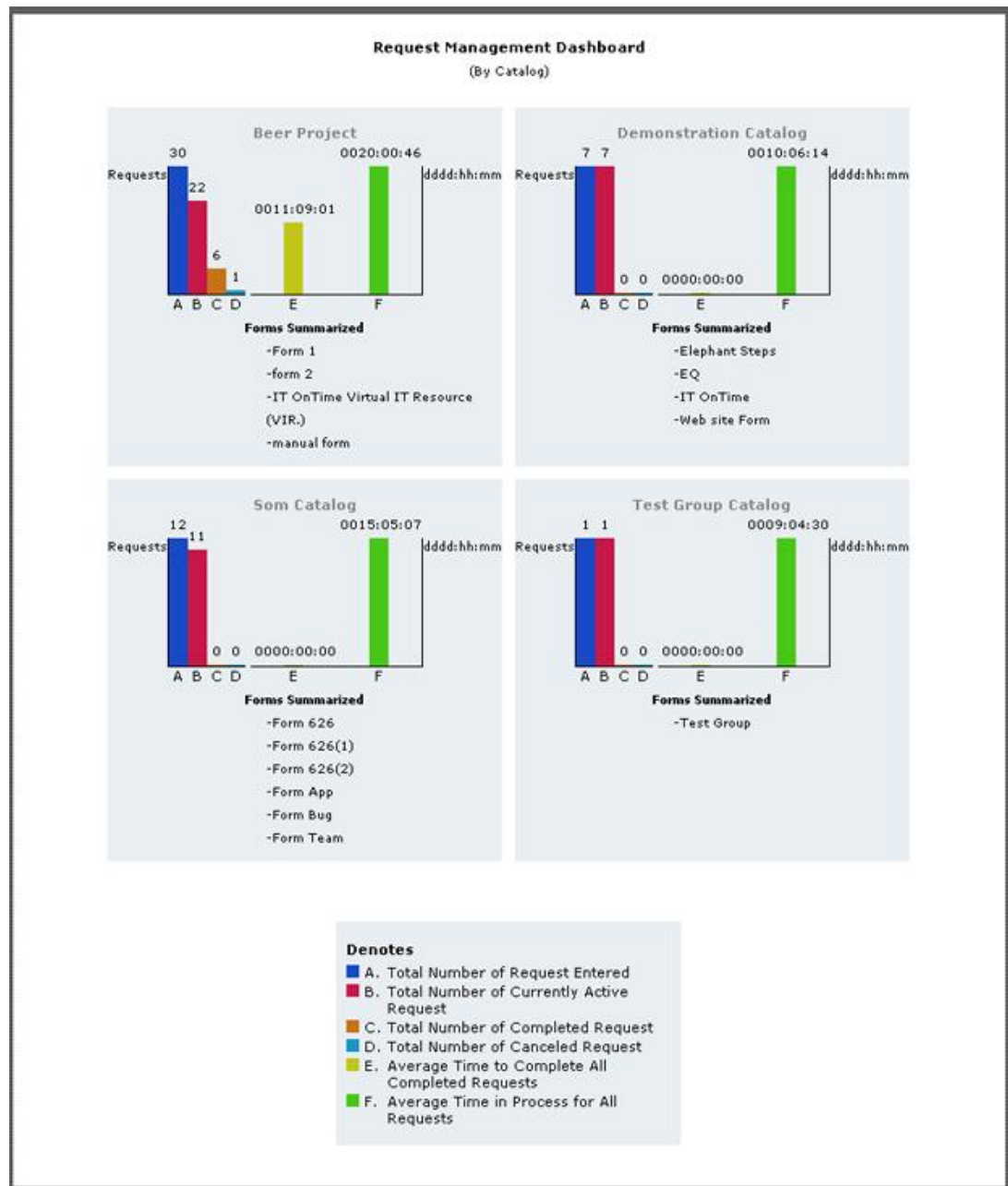
*Navigation: Request Dashboard->View Request Dashboard*

**Figure 9.4 - Request Dashboard High Level Summary Screen**



The first screen is always All Catalogs even if the selection includes only one Catalog. The legend at the bottom describes the contents of each bar in the graph. The next figure shows the drill down hot spots. You can find the hotspots by moving your mouse over the graph. The cursor will display a hand or the chosen icon for a hyperlink for your browser settings.

**Figure 9.5 - Request Dashboard Hot Spots**



Clicking on All Catalogs will display the individual Catalogs in the current selection on one screen.

*Figure 9.6 - Request Dashboard Individual Catalog Display*



Beer Project Form 1					
#	Subject	Priority	Current Step	Created By	Date Created
1	Request1	Normal	Archived	Rms System Admin (rmsadmin)	6/6/2006
2	Request2	Normal	Completed	Rms System Admin (rmsadmin)	6/6/2006
3	Request3	Normal	Design and Development	Rms System Admin (rmsadmin)	6/6/2006
4	Request4	Normal	Completed	Rms System Admin (rmsadmin)	6/7/2006
5	request 5 not assign to beer	Normal	Load to Production System	Rms System Admin (rmsadmin)	6/7/2006
6	Request6	Normal	Design and Development	Rms System Admin (rmsadmin)	6/7/2006
7	test	Normal	Completed	Rms System Admin (rmsadmin)	6/9/2006
8	aaaa	Normal	Design and Development	Rms System Admin (rmsadmin)	6/22/2006
9	xxx	Normal	com1	Rms System Admin (rmsadmin)	6/22/2006
10	new	Normal	com1	Rms System Admin (rmsadmin)	6/23/2006
11	qqq	Normal	com1 2	Rms System Admin (rmsadmin)	6/23/2006
12	lastest	Normal	com1	Rms System Admin (rmsadmin)	6/28/2006
13	zzz	Normal	com1	Rms System Admin (rmsadmin)	6/28/2006
14	www	Normal	com1	Rms System Admin (rmsadmin)	6/28/2006
15	zzzz	Normal	com1	Rms System Admin (rmsadmin)	6/28/2006
16	yyyy	Normal	com1	Rms System Admin (rmsadmin)	6/28/2006
17	rrr	Normal	com1	Rms System Admin (rmsadmin)	6/29/2006
18	ddd	Normal	com1	Rms System Admin (rmsadmin)	6/29/2006
19	zzzzz	Normal	Design and Development	Rms System Admin (rmsadmin)	6/29/2006
20	qqqq	Normal	Canceled	Rms System Admin (rmsadmin)	7/4/2006
21	neoooo	Normal	Review Request	beer (beer)	7/5/2006
22	zzzzz	Normal	Design and Development	beer (beer)	7/5/2006
23	xxx	Normal	Assign Developers or Programmers	beer (beer)	7/5/2006
24	Group som1	High	Assign Developers or Programmers	User_Groupstest1 (User_groupstest1)	7/10/2006
form 2					
#	Subject	Priority	Current Step	Created By	Date Created
1	xxx	Normal	Assign Developers	Rms System Admin (rmsadmin)	6/6/2006
2	ddd	Normal	IT Department Review	Rms System Admin (rmsadmin)	6/27/2006
3	request3	Normal	Completed	Rms System Admin (rmsadmin)	7/14/2006
4	request4	Normal	Completed	Rms System Admin (rmsadmin)	7/14/2006
manual form					
#	Subject	Priority	Current Step	Created By	Date Created
1	request1	Low	Completed	Rms System Admin (rmsadmin)	7/4/2006
2	request2	Normal	complete step	Rms System Admin (rmsadmin)	7/4/2006
Som Catalog Form App					
#	Subject	Priority	Current Step	Created By	Date Created
1	test date	Normal	Archived	Khanokvan (some)	6/20/2006
2	From uer_som1	High	Enter an Enhancement Request	user_som1 (user_som1)	6/28/2006
3	test group mail	High	Development Testing	Khanokvan (some)	6/29/2006
4	test1	Normal	Assign Developers	Khanokvan (some)	7/3/2006
5	Reminder	High	Assign Developers	Khanokvan (some)	7/5/2006
6	ddddd	High	IT Department Review	Khanokvan (some)	7/18/2006
Form Bug					
#	Subject	Priority	Current Step	Created By	Date Created
1	T1	Normal	Design/Development Review	Khanokvan (some)	7/17/2006
2	T2	High	Assign QA Reviewer	Khanokvan (some)	7/17/2006
Form Team					
#	Subject	Priority	Current Step	Created By	Date Created
1	test1	Normal	Test Team1	UserTeam1 (UserTeam1)	6/22/2006
2	test2 nonteam	High	Assignment	UserTeam3 (UserTeam3)	6/22/2006
3	test3 team	Low	Assignment	UserTeam1 (UserTeam1)	6/22/2006
4	Test Group1	High	Test Team1	User_Groupstest1 (User_groupstest1)	7/10/2006
Demonstration Catalog EQ					
#	Subject	Priority	Current Step	Created By	Date Created
1	Review and View permissions	Normal	Management Review	User Demo (userdemo)	7/8/2006
2	Review Request	High	Management Review	Admin Demo (admindemo)	7/8/2006
3	Create New Request	High	IT Department Review	User Demo (userdemo)	7/13/2006
4	Test Create Request	High	Management Review	User Demo (userdemo)	7/13/2006

The display shows one graph for each Catalog. The same hot spots are available. Clicking on the Catalog name will display all the Forms in the Catalog.

*Navigation: Request Dashboard*

**Figure 9.7 - Request Dashboard Individual Form Display**

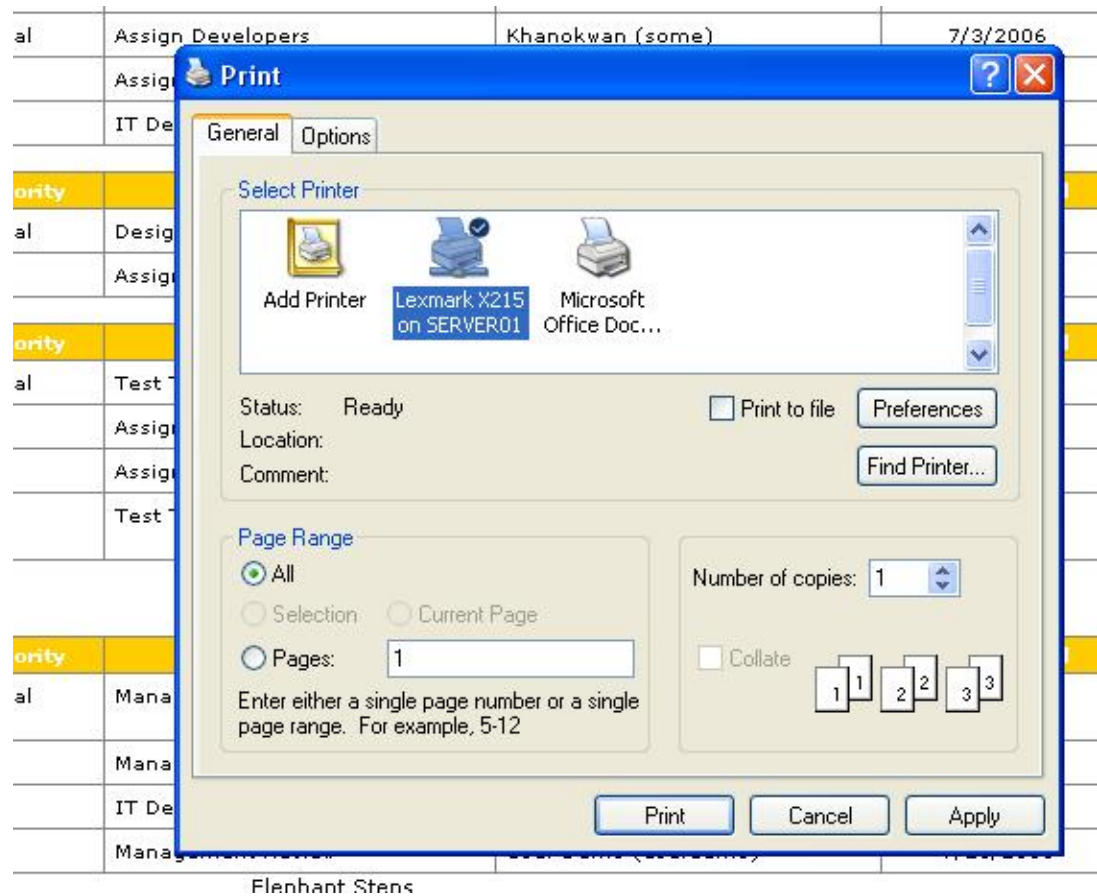
Beer Project					
Form 1					
#	Subject	Priority	Current Step	Created By	Time(dd:hh:mm)
2	Request2	Normal	Completed	Rms System Admin (rmsadmin)	0000:00:02
4	Request4	Normal	Completed	Rms System Admin (rmsadmin)	0035:01:35
7	test	Normal	Completed	Rms System Admin (rmsadmin)	0023:03:34
form 2					
#	Subject	Priority	Current Step	Created By	Time(dd:hh:mm)
3	request3	Normal	Completed	Rms System Admin (rmsadmin)	0000:00:28
4	request4	Normal	Completed	Rms System Admin (rmsadmin)	0000:00:29
manual form					
#	Subject	Priority	Current Step	Created By	Time(dd:hh:mm)
1	request1	Low	Completed	Rms System Admin (rmsadmin)	0000:00:01
Total Time :					0068:06:09
Average Time :					0011:09:02

Print Close

This titles in this display are no longer hot spots as Form is the lowest drill down level. However, the bars in the graph are still active.

Clicking on one of the bars in graph produces a summary report of all Requests contained the bar. As an example, clicking on bar A in Test Form 1 produces the following report.

Figure 9.8 - Request Dashboard Summary Report

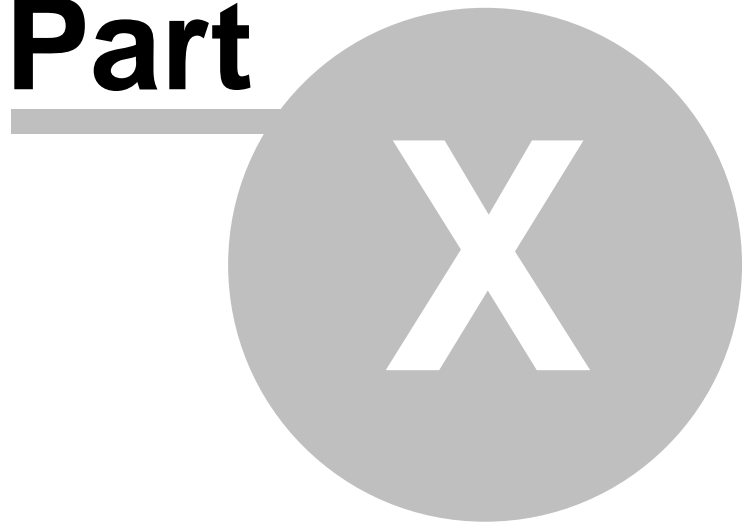


Clicking the Print button on any of the Request Dashboard windows will open a system printer selection dialogue box. Output will go to the selected printer. The Close button closes the current window.

# Top Level Intro

This page is printed before a new  
top-level chapter starts

# Part



## 10 Request Manager

The Request Manager provides Administrators with the ability to Review and Approve Requests even though they are not assigned to the current Step for the Request. It also provides the ability to Edit Requests when the Request Owner or a Request Reviewer finds that the original Request needs additional information or is inaccurate based on current needs.

### Concepts:

The Request Manager screens look like their counterparts in Request Approval. The sole difference is the addition of an Edit button. Approving Requests function identically.

### Business Rules and Defaults:

The Request Manager displays all Active Requests in a Form in one list.

The Request Manager list is not sortable.

Editing a Request permits the Administrator to modify the Request's specifications.

Editing a Request maintains a history of the edits. If a Request is submitted and then edited twice, there will be three versions of the Request Creation form, the original, the first edit and the second edit.

All time calculations for edited Requests use the original Request entry date.

Any field added since creation of the Request is available when editing the Request.

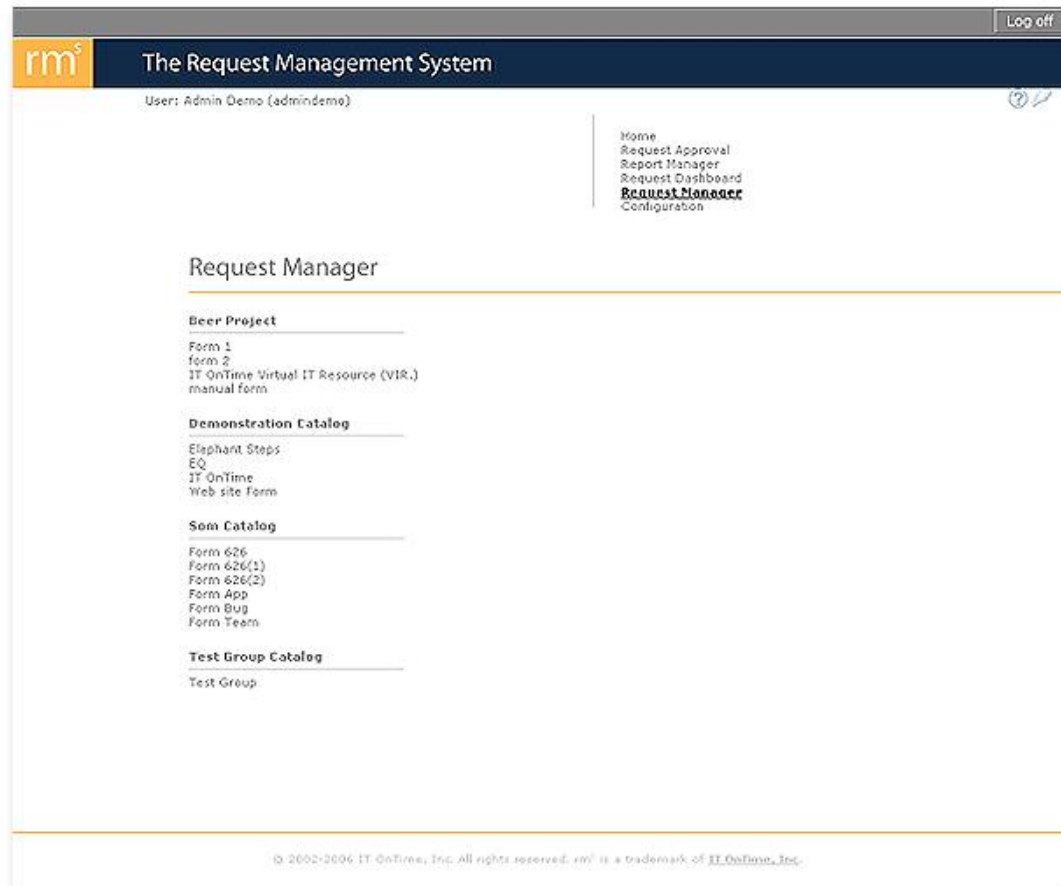
Any field deleted since creation of the Request is not available when editing the Request.

### Request Manager: (System, Project and Task Administrators Only)

The Request Manager is accessible from the rm<sup>s</sup> main menu. It is the Fifth item below Home, Request Approval, Report Manager and Request Dashboard. The Request Manager main screen is shown in the following figure. It should be familiar as it is identical to the Request Approval screen except for the Edit button.

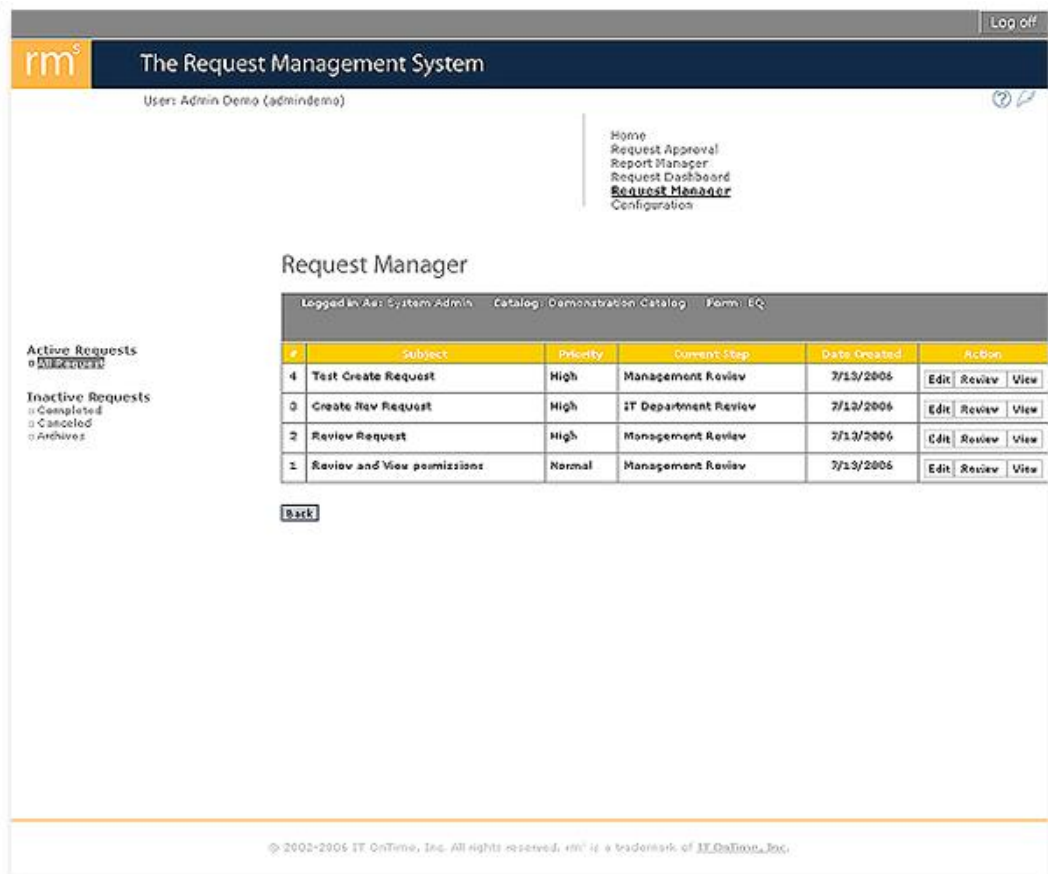
*Navigation: Request Manager*

**Figure 10.1 - Request Manager Main Screen**



This screen is identical to the Request Approval screen except that this screen displays all Catalogs and Forms accessible by the User in their role as a System, Project or Task Administrator. Just like Request Approval, clicking on the form name will open a similar screen.

**Figure 10.2 - Request Dashboard Main Screen**



rm<sup>o</sup> The Request Management System

User: Admin Demo (admin@demo)

Home  
Request Approval  
Report Manager  
Request Dashboard  
**Request Manager**  
Configuration

### Request Manager

Logged in As: System Admin > Catalog > Demonstration Catalog > Form: EQ

#	Subject	Priority	Current Step	Date Created	Action
4	Test Create Request	High	Management Review	7/13/2006	Edit Review View
3	Create New Request	High	IT Department Review	7/13/2006	Edit Review View
2	Review Request	High	Management Review	7/13/2006	Edit Review View
1	Review and View permissions	Normal	Management Review	7/13/2006	Edit Review View

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The list contains all Active Requests for the Form. The Review and View buttons function identically to Request Approval. These are documented in the rms Users' Manual.

Clicking on the Edit button will open a screen similar to the one below.

*Figure 10.3 - Request Manager Edit*



## Request Manager

Logged In As: System Admin    Catalog: Demonstration Catalog    Form: EQ																													
<b>Request 1 : Review and View permissions</b>																													
<b>Request Body</b>																													
<b>Request Details</b>																													
Request Number	1																												
Subject	Review and View permissions																												
Priority	Normal																												
Creator Name	User Demo (userdemo)																												
Last Update	7/7/2006 5:12:31 PM																												
Description	Please check for View and Review button permissions.																												
Request Type	Program Logic [Change]																												
Business User																													
Business User's Email																													
Date Desired	7/10/2006																												
Attachment(s)																													
<b>Your Update</b>																													
* Subject	<input type="text" value="Review and View permissions"/>																												
* Priority	<input type="radio"/> Low <input checked="" type="radio"/> Normal <input type="radio"/> High <input type="radio"/> Urgent																												
Edited By	Admin Demo (admindemo) For User Demo (userdemo)																												
Last Update	7/19/2006																												
* Description	<input type="text" value="Please check for View and Review button permissions."/> Please Describe the program enhancement you desire																												
Request Type	Please select all actions that apply to this request <table border="1"> <thead> <tr> <th>Name</th> <th>Add</th> <th>Change</th> <th>Remove</th> </tr> </thead> <tbody> <tr> <td>Screen</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Program Feature</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Data Field</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Report</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Program Logic</td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Other</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </tbody> </table>	Name	Add	Change	Remove	Screen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Program Feature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Data Field	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Program Logic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Name	Add	Change	Remove																										
Screen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																										
Program Feature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																										
Data Field	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																										
Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																										
Program Logic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>																										
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																										
Business User	<input type="text"/> Enter the name of the business user sponsoring this change																												
Business User's Email	<input type="text"/> Please enter the business user's email address																												
* Date Desired	<input type="text" value="7/10/2006"/> <input type="button" value="BX"/> Please enter the date when you would like this request.																												
Attachment(s)	Enter the name of the business user sponsoring this change <input type="button" value="Attach File(s)"/>																												
* Denotes a required field																													
<input type="button" value="Save"/> <input type="button" value="Cancel"/>																													

The screen contains two areas:

The previous version(s) of the request are display at the beginning. If more than one previous version exists, all are displayed in sequence.

The current fields in the Request Creation form are displayed under Your Update. All Required fields are now enforced. Current field values are copied from the previous version of the Request. After making all changes, click the Save button to keep the edits. Cancel discards the edits.

The edited Request will now appear as shown in the next Figure. Anyone Assigned to the current Step for the Request and the Request Owner will receive email notifications.

Figure 10.4 - Edited Request Using View

### Request Manager

Logged In As: System Admin    Catalog: Demonstration Catalog    Form: EQ

**Request 1 : Review and View permissions**

**Request Body**

Request Details	
Request Number	1
Subject	Review and View permissions
Priority	Normal
Creator Name	User Demo (userdemo)
Last Update	7/8/2006 - 00:12
Description	Please check for View and Review button permissions.
Request Type	Program Logic [Change]
Date Desired	7/10/2006

**User Approval(s)**

IT Department Review	
Approved By	User Demo (userdemo)
Assigned Users	1. User Demo (userdemo)
Date	7/8/2006 - 00:24

**Your Approval**

Management Review	
Attachments	<input type="button" value="Attach File(s)"/>
Time Tracking	<input type="button" value="Time Tracking"/>
Comment	<div style="border: 1px solid gray; height: 60px;"></div>
Assign Users	<input type="checkbox"/> Admin Demo (admindemo) <input type="checkbox"/> User Demo (userdemo)
Step Action	<input type="radio"/> Approve : Please select to send to Assign Developers. <input type="radio"/> Return : Please select to return to Enter an Enhancement Request. <input type="radio"/> Cancel : Please select to cancel this request.

# Top Level Intro

This page is printed before a new  
top-level chapter starts

# Part



XI

## 11 Addendum

This section display relevant information about rm<sup>s</sup>.

### 11.1 Maximum Field Sizes

As is the case with most computer software, rm<sup>s</sup> has limitations on certain fields. Among those things that rm<sup>s</sup> does not limit are the number of Service Catalogs, Forms, Users and Workers that you can define unless you have a license limitation. However, descriptions and other information are limited. We have carefully chosen limits that we believe will not create issues when using rm<sup>s</sup>. The following table shows field limits by screen.

Screen	Field Name	Maximum Length
Field in Form	Order No	5
	Name	200
	Description	255
Request Create Step Edit	Name	200
Request Type Field Edit	Order	5
	Name	200
	Description	255
Request Type Edit	Order	5
	Name	150
Workflow Step Add/Edit	Name	200
Sub-Workflow Add/Edit	Name	100
Sub-Workflow Step Add/Edit	Name	200
Form Create/Edit	Name	200
	Attachment Include	50
	Attachment Exclude	50
Catalog Create/Edit	Name	200
Field Type Add/Edit	Name	100
Field Type Item Add/Edit	Order	3
	Name	100

Endnotes 2... (after index)

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