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

Table of Contents

Foreword 5

Part I Introduction 7

1 rms Glossary 7

Part II System Requirements 13

Part III rms Installer 16

Part IV Building Your Workflow 32

1 Adding Catalogs and Forms 32

2 Defining and Managing Field Types 33

3 Building Your Request Creation Form 33

4 Adding Steps 34

Part V Users, Administrators and Workers 38

1 Defining Users 38

2 Define Administrators 38

3 Assigning Step Privileges 39

4 Defining Workers 40

Index 0

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Foreword

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placed between table of contents
and topics

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Top Level Intro

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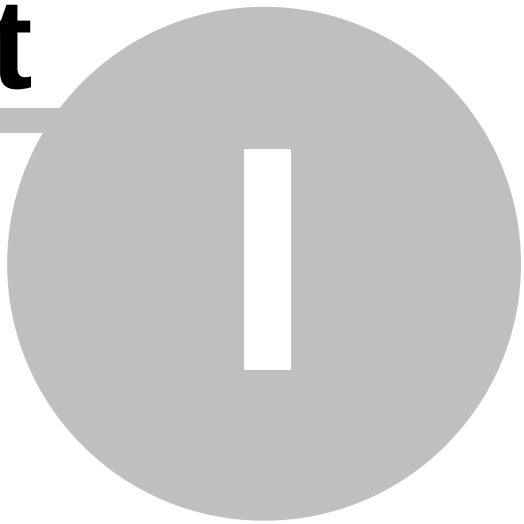

1 Introduction

This Installation and Quick Start Guide for rm^s Administrators is intended for experienced computer users. It assumes that rm^s is up and running and you can already login using the default administrator account, rm^s admin, or your own account. This guide will briefly describe:

- System Requirements for Servers and Workstations
- The Installation Process
- Defining a Catalog and Form
- Building Your Request Creation Form
- Creating Your Workflow
- Defining Users
- Defining Administrators
- Assigning Users to Steps

After going through this guide, you will have enough information to install rm^s, build a simple, working rm^s Catalog and Form. If you want to use additional features, please see the rm^s Administrator's Guide. The rm^s User's Guide explains the users' functions of rm^s.

As a note, whenever you see a word capitalized in the middle of a sentence that is not a proper noun, it means that we are using the term as defined in the rm^s Glossary. If the word is not capitalized, the sentence is using its generally understood meaning.

At the top of each section you will see the menu navigation to get you to the described information. All Navigation is done starting with rm^s Navigation area on the upper right of each screen.

1.1 rms Glossary

The following provides the rm^s 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^s. Almost all rm^s 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^s.

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Administrator - A person who can make changes to rm^s. rm^s supports four Administrator classes.

- **System Administrators** - Can manage an rm^s instance. Can add Catalogs and can create Administrators of any class. They see everything within their rm^s instance.
- **Catalog Administrators** - Can manage an rm^s Service Catalog. They can create and manage Forms, change workflows, can create Catalog, Task and User Administrators and can do all User management functions. 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^s Catalog. They may add or deactivate users, 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 Group of Users defined in the Active Directory on the network and imported into rm^s with the ADSI tools. Changes to ADSI Group membership are not allowed within rm^s.

ADSI User - An rm^s User defined in the Active Directory on the network and imported into rm^s 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 and Administrators within rm^s. A Catalog covers a business activity such as Web development, a computer application system or graphic design projects. Also called a **Service Catalog.** rm^s 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.

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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 similar 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^{s}. 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$_{s}$ 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^{s}.

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 and Administrators within rm^{s}. A Catalog covers some business activity such as Web development, a computer application system or graphic design projects. Also called a **Catalog.** rm^{s} 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 screen. 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

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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^{s}, Teams 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^{s} your forms. Forms and Field Types may have Templates.

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

Worker - A person who is listed within rm^{s} 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^{s}. They may not login, create or Approve Requests.

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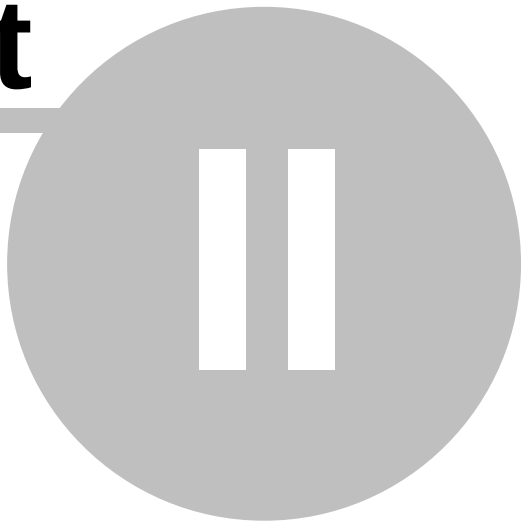

2 System Requirements

rm^{s} has few specialized system requirements.

Servers

Hardware - No special requirements

Operating Systems - Microsoft® Windows NT Server, Microsoft Windows 2000 Server and Microsoft Windows 2003 Server.

rm^{s} also supports Microsoft Windows 2000 Professional and Windows XP. However, the security facilities in Windows XP Service Pack 2 if not properly managed can interfere with rm^{s}.

Web Server - Microsoft IIS 4 or higher
Databases - Microsoft Access, Microsoft SQL Server 2000 and higher, Oracle 8i and higher.

The server running Microsoft Access does not need Access installed. rm^{s} generates the Access database.

If you choose to use ASP Upload for Persits Software as your rm^{s} File Upload tool, you will need to install it before installing rm^{s}.

If you choose to use ASP Mail from Persits Software as your rm^{s} Mail Component, you will need to install it before installing rm^{s}.

If you choose cdosys.dll or cdonts.dll as your rm^{s} Mail Component, you will need to install and have the IIS SMTP server configured before installing rm^{s}.

rm^{s} can be run with SSL. If you choose to use SSL, you will need a Security Certificate to run rm^{s}. Also, you need to make changes to the config_server.ini in the rm^{s} root directory. Instructions are in the file.

Workstations

Hardware - No special requirements

Operating Systems - No special requirements

Web Browser - Any browser that supports JavaScript and Pop-Up Windows.
Screens may look different than those shown in the manual because of different rendering cause by the operating system and Web browser rm^{s} relies on Pop-Up Windows. You will need to turn off Pop-Up blocking for the rm^{s} URL.

Certain functions rm^{s} uses to update screens are similar to those monitored by Ad Blocking software. You will need to turn off Ad Blocking for the rm^{s} URL.

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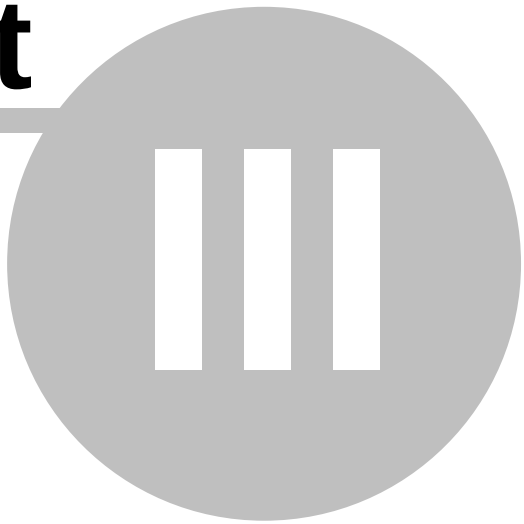
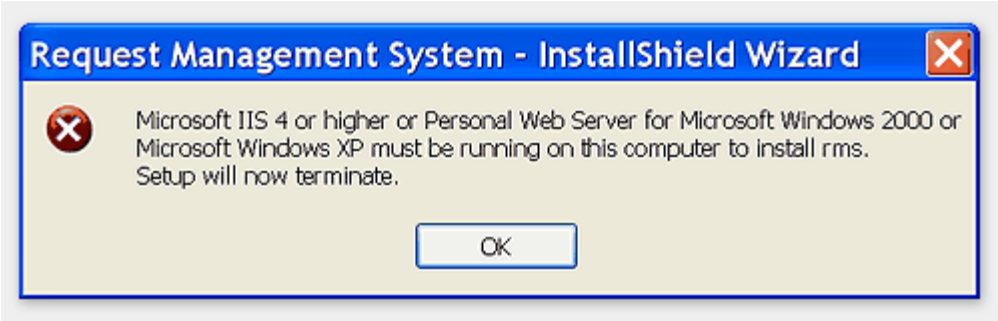


3 rms Installer

New or Additional Installation

rm^{s} is easy to install. Run the setup program by double-clicking on the file in Windows Explorer. rm^{s} setup will check to make that a compatible IIS version is running on your computer or server. If no version of IIS is found, you will see this message. rm^{s} setup is terminating because of this.

Figure 1 - IIS or Personal Web Server Not Found on Computer



The next screen that you see will depend upon whether or not you previously installed rm^{s} on your computer. If your computer contains no previous rm^{s} installations, you will see the following screen. Note that some screens are Windows XP or Windows Server 2003 and some are Windows 2000. While the display varies because of the operating system, the contents will be the same.

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Figure 2 - No Previous rm^s Installation

If you installed a version of rm^s on this computer, you will see the following screen. If the rm^s version is 2.1.1 or earlier, this screen will only appear if rm^s is installed in an rms2 directory. Information about earlier rm^s installations was not stored in the registry on your computer so the new setup program cannot easily detect previous versions.

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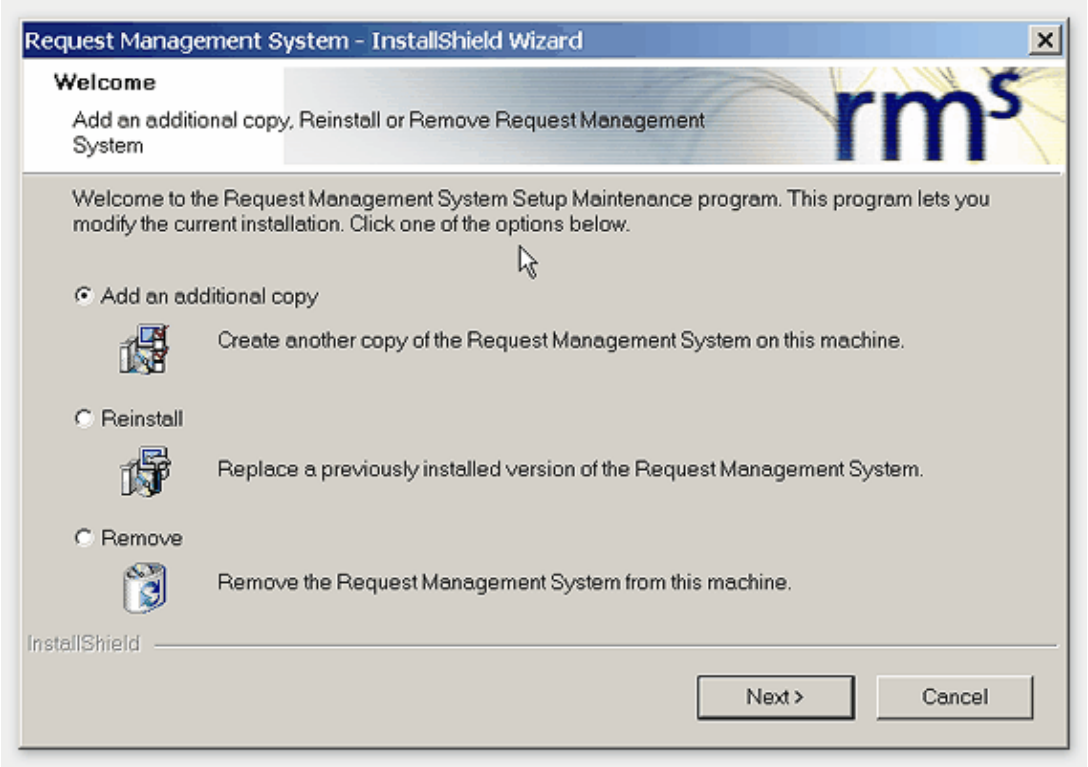
Figure 3 - rm^s version installed



The next screen that you will see in either case is the rm^s the License Agreement. Read the agreement carefully. It is a legal document. If you agree with the terms, select the I Accept the Terms of the License Agreement radio button. You will now continue to install rm^s. If you select the other I do not ... radio button, rm^s setup will terminate.

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Figure 4 - rm^{s} License Agreement

If you are installing rm^{s} for the first time or adding an additional copy, the screen you will see after accepting the License contains a finder as shown in the next figure. Use this finder to select an installation directory. If you are using Windows 2000 Professional or any version of Windows XP, you can only install rm^{s} in the INETPUB\WWWROOT directory. IIS Personal Web Server is unable to locate files accurately if installed in other directories. If you are running Microsoft Windows 2000 Server or higher, you can install rm^{s} anywhere on your computer.

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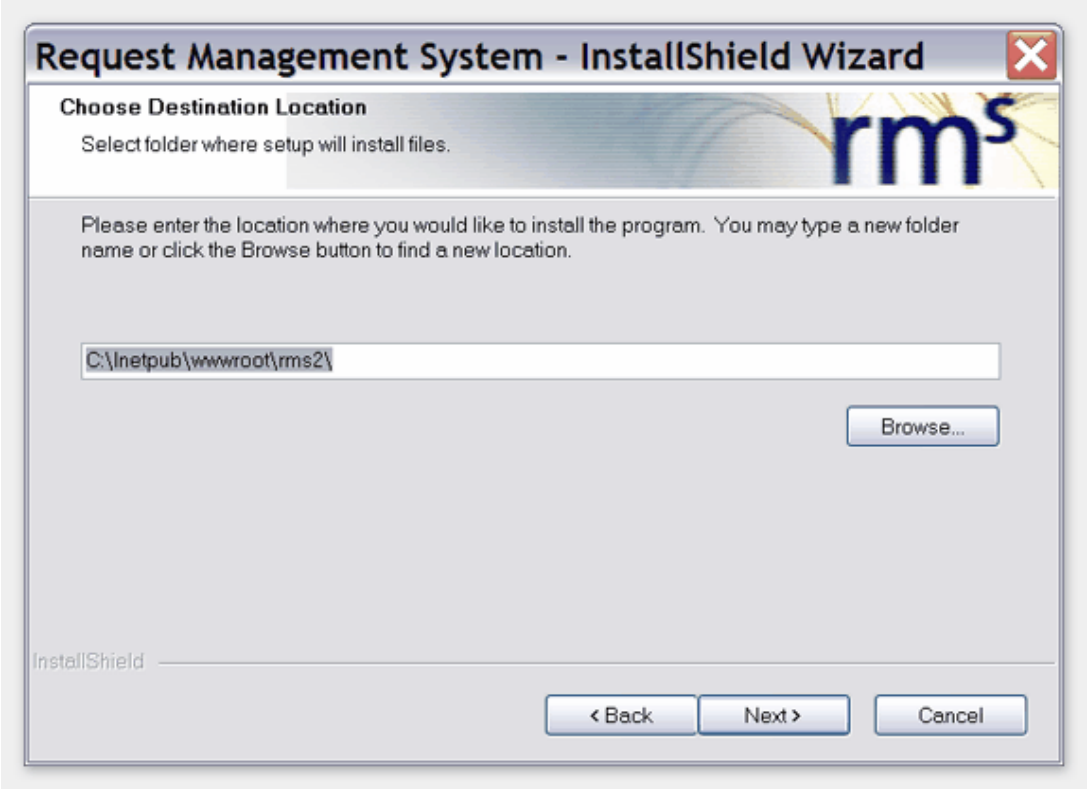
Figure 5 - rm^{s} Installation Directory



After selecting your rm^{s} directory and clicking the next button, you will see a screen that allows you to specify the Virtual Directory or Web Site name for your rm^{s} installation. If you are running Microsoft Windows 2000 Professional or Microsoft Windows 2000 XP Professional, you will see the next screen. If your are running Microsoft Windows 2000 Server or Microsoft Windows 2003 Server, you will see the following screen.

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Figure 6 - Virtual Directory For Microsoft Personal Web Server

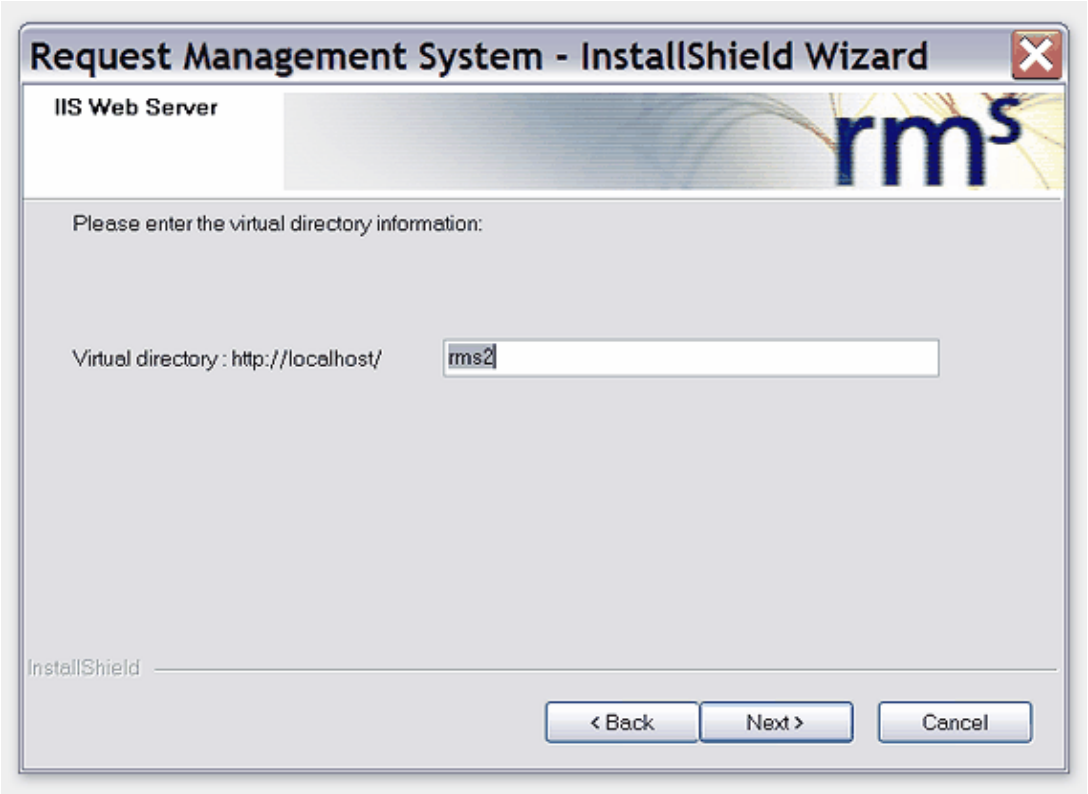

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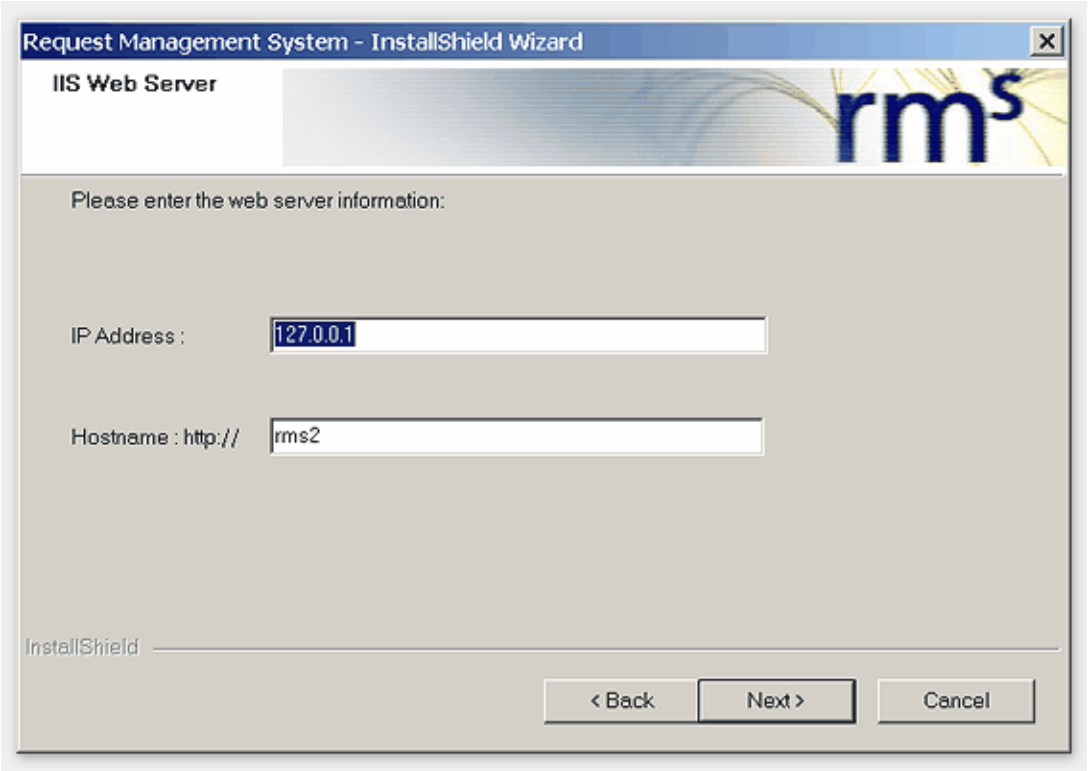
Figure 7 - IP Address and Hostname for IIS Servers



Fill in the appropriate values and click the Next button. The IP address must be the actual IP address of the Web site and not a symbolic name resolvable through DNS. The rm^{s} installer cannot correctly resolve names. After clicking the Next button, you will see a screen that summarizes your installation parameters.

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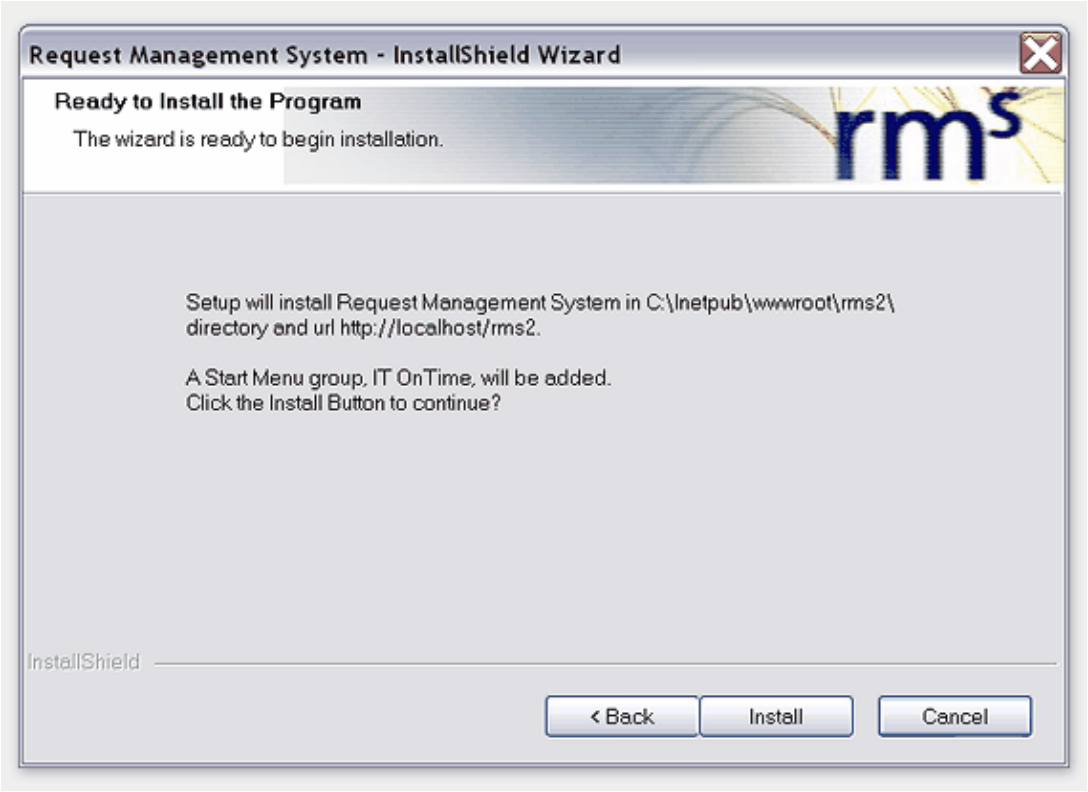
Figure 8 - Installation Parameters Confirmation



After clicking the Next button, the installer will now:

1. Install rm^s in the specified directory.
2. Create a Virtual Directory or Web Site with the specified name.
3. Create a Start Menu group called IT OnTime
   The Start Menu group contains four entries.
   a. A submenu that contains shortcuts to the three manuals for rm^s.
   b. A shortcut to an Adobe Acrobat version of the License Agreement
   c. A shortcut to the Readme file for this version of rm^s.
   d. A shortcut that will start rm^s in the default Web browser for Personal Web Server installations only.
4. Add a Windows Registry entry called IT OnTime, Inc. that contains information about the current installation.

Click Install to continue. rm^s setup will now load the software onto your computer.

Once the setup program finishes, you will see the following screen.

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Figure 9 - Installation Successfully Completed - Personal Web Server

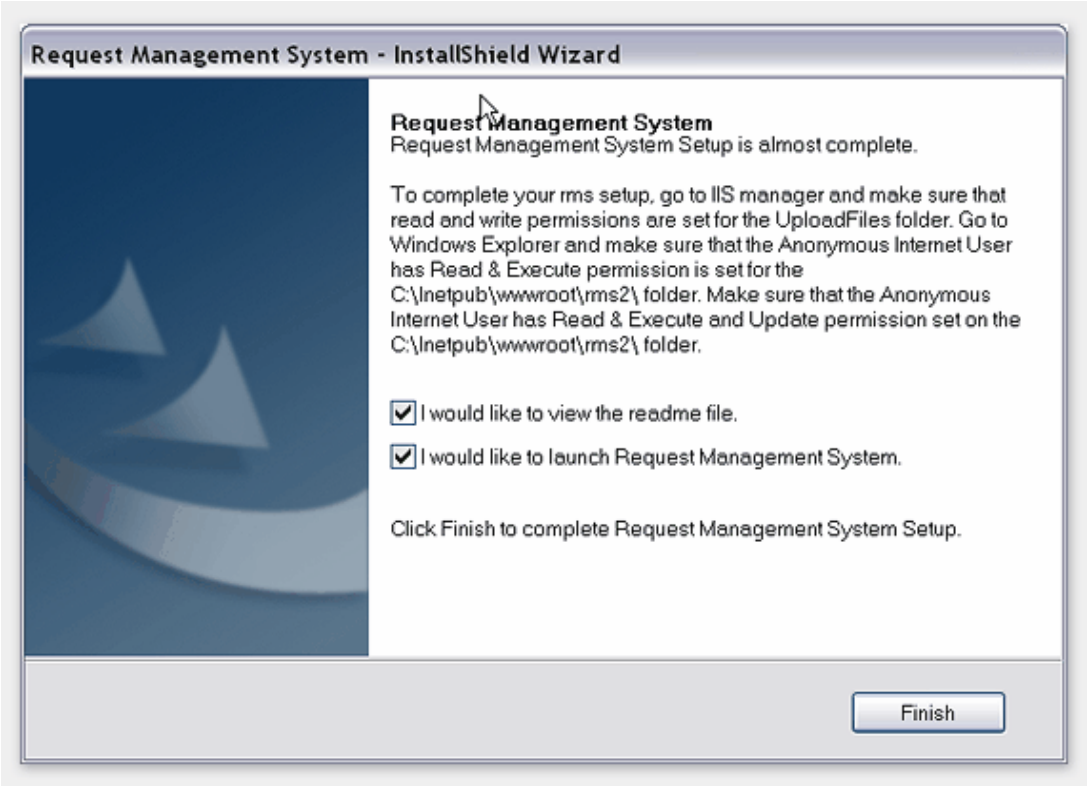

Figure 10 - Installation Successfully Completed - IIS 4.0 or Higher

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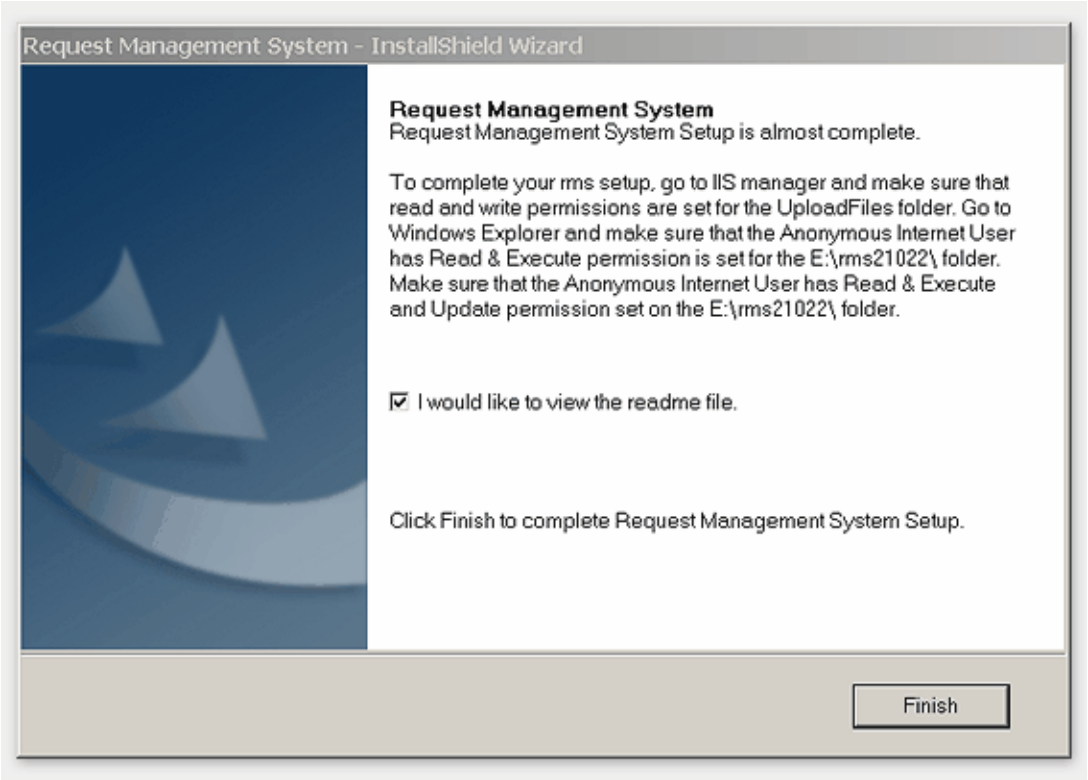

Uncheck the check boxes if you do not want to see the readme file or run this installation of rm^{s} and then click Finish. Your rm^{s} installation is now completed.

Once rm^{s} setup finishes and you are running Personal Web Server on Windows 2000 Professional or Windows XP Professional, you are ready to run rm^{s}.

If you did an install on a server, you may need to do one or more of the following:

1. Add an IP address to the server for rms.
2. Add a symbolic name for rm^{s} to your DNS server.
3. Add a Host Header Name to the rm^{s} site in IIS if you are using Hosts files for multiple Web sites at one IP address.
4. Add the new rm^{s} URL to your Hosts files and distribute it using your update mechanism.

If rm^{s} fails to run, you may need to do two more thing before continuing to run rm^{s}. Go to Internet Information Services in Administrative tools. Expand the tree until you find your rm^{s} installation. Expand the tree until you see the folder UploadFiles. Right click on UploadFiles. Click Properties. On the first page of the Properties sheet for UploadFiles you will see check boxes. Make sure the Write check box is marked as selected. This is where rm^{s} stores attachments and other internal information. Close all the browser windows you opened to do this. Now using My Computer or Windows Explorer, find the rm^{s} directory. Right click on it and go to the Security tab. Set modify, read and write permissions for the Internet Anonymous user.

The first thing that you will see after starting rm^{s} is the License information screen. If you have an rm^{s} license for this version, enter it into Product Key and Product Password boxes. These must be entered exactly as you received them. If you do not have a license but want to try rm^{s}, click Continue Trial.

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If you want to purchase an rm^{s} License or view information about rm^{s} on the IT OnTime Web site, click Purchase Now. This will take you to the IT OnTime Web site.

If you selected Adding an Additional Copy, the screen sequence will be the same. Make sure to specify a new folder and Virtual Directory or Web site.

Once you have started rm^{s}, you can initially log in using as the user rmsadmin with the password of rmsadmin. The first thing that you should do is create your Username by going to Configuration, Users. Once this is completed, make yourself a System Administrator by going to Configuration, System Administrators. Log out of rm^{s} and log back in using your new user name. Go to Configuration, Users and change the rmsadmin password.

This completes your rm^{s} installation. You can now continue with the next section Building Your Workflow.

If rms is not operating at this point, contact IT OnTime by email at techsupport@it-ontime.com.

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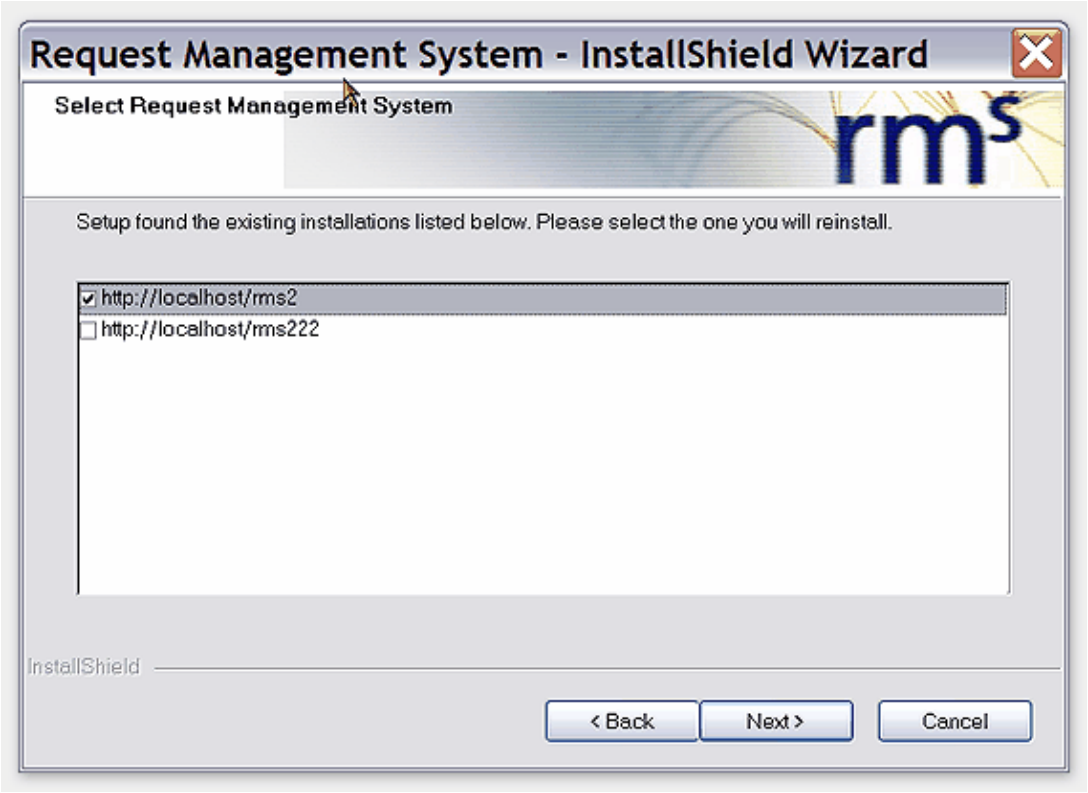
Reinstalling rms

If you select Reinstall and then click the Next button, you will see the following screen. It allows you to select the installation that you wish to upgrade or reinstall. If upgrading from a version of rms prior to 2.2, you will only see rms2 in the list.

Figure 11 - rms Installation to Reinstall



Click the checkbox next to the installation you wish to change and then click the Next button. You will see the installation summary screen. Afterward, all screens will be the same as described previously in New or Additional Installation.

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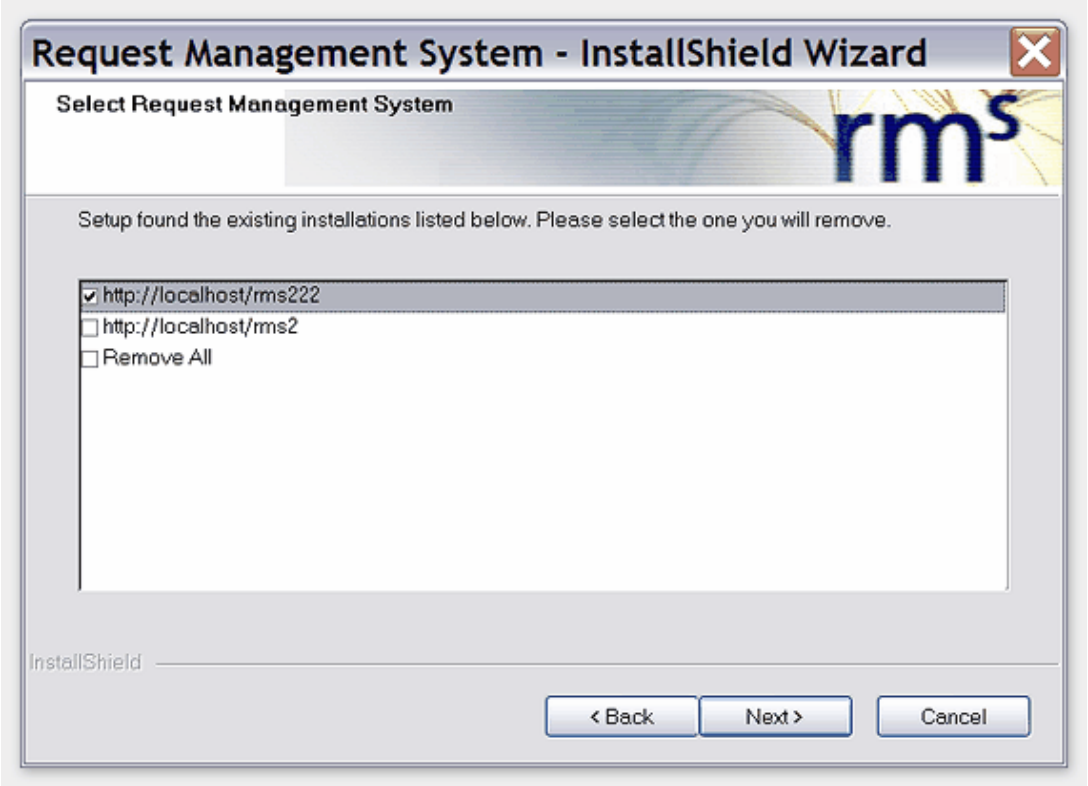
Uninstalling rm^s

If you selected Remove and then clicked the Next button, you will see a screen similar to the following screen. It allows you to select the rm^s installation that you wish to remove. If you only have rm^s Version 2.1.1 or earlier installed, you will only see Remove All. Select the version that you wish to remove and then click the Next button.

Figure 12 - Remove rm^s Selection



You will next see a confirmation box showing the selection that you made. Click Yes to proceed with the uninstall. Once the uninstall is completed, you will see a screen similar to the next one. It contains a reminder that you may still have files on your computer or the database for rms if you used Microsoft SQL Server or Oracle database.

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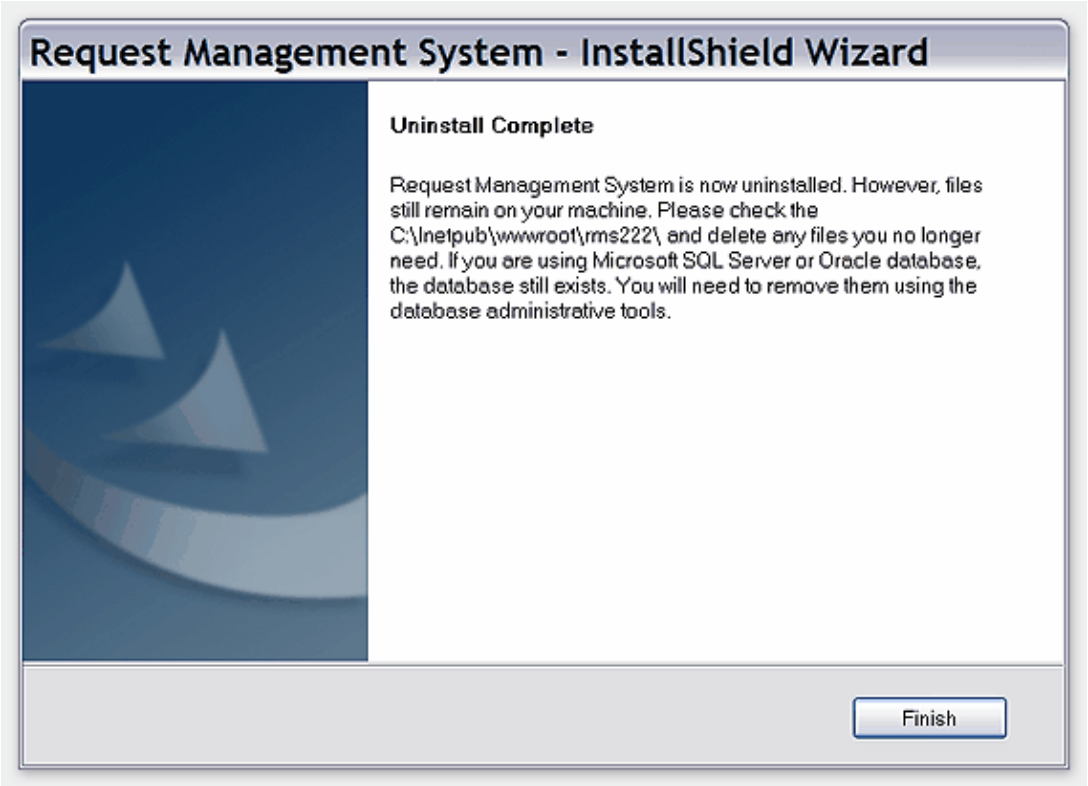
Figure 13 - Completed Uninstall



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Part IV

4 Building Your Workflow

rm^{s} divides the world into Service Catalogs. The first thing you will need to do is decide how many Service Catalog you want to define and their names. This is restricted to System Administrators. If you are a Catalog Administrator or using rm^{s} as an ASP product, the Catalog will already exist.

Once the Catalog exists, you are now ready to define Forms. Define a Form for each logical type of Request. Examples of logical request types are bugs or enhancements. Bugs require different information than requests for new features or enhancements. Once the Form is defined, you can build the Request Creation Form. Define the information the Request Creator needs to supply so that people fulfilling the Request can complete their work.

Now you can define the Workflow by adding Steps to the Form. Decide what work must be performed to fulfill the Request and the order. Create a Step for each logical work unit. Examples are: Review Request and Authorize Work; Design Graphics; Perform Quality Assurance Review. This completes the Workflow. If you have a complex Workflow with Branches or where one group fulfills Requests defined by two or more Forms, you will need to refer to the rm^{s} Administrators' Manual. See Sub-Workflows and Common Forms.

All items used to build your Workflow are accessed through the Configuration screen.

4.1 Adding Catalogs and Forms

Navigation: Configuration -> Catalogs and Forms -> Catalogs and Forms

Go to Catalogs and Forms on the Configuration Screen. Click the Add button on the Catalog Manager screen. Enter the Catalog Name. Choose the Time Zone for all Requests in the Catalog. This will be the time zone used for all time stamps. This eliminates the time paradox of a Step being approved before the following Step is started. Make sure Active is Yes. Click Save. The Catalog Manager screen will now display your Catalog in the table.

Click Manage Forms. Click Add. Fill out the form on the Form Manager screen.

Common Workflows can be shared by all Forms in a Catalog. However, if this is your first rm^{s} form, you probably want to set this No.

If you wish to use a predefined template, select it from the drop down list. rm^{s} will copy the Request Creation form and the steps in the Workflow Template to your Form.

Enter the name for the Form.

File Upload Extensions controls the allowable file types for file attachments to Requests. You can use the radio button to control whether you want to specify files by entering a list of allowable file types or a list of disallowed file types. For all files, select Exclude and clear the entry fields. Entries are formatted as *.xxx. Multiple entries are separated by commas (,).

Allow Sub-Workflows will allow you to define Branches for alternative Request routing. If this is your first rm^{s} form, you probably want to set this to No. Active should be Yes. Click Save. The Form Manager screen will now show your Catalog in the table.

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You now have a Catalog and Form defined. The next step is to create your Request Creation form.

4.2 Defining and Managing Field Types

Navigation: Configuration -> Catalogs and Forms -> Catalogs and Forms -> Manage Field Types

Before you begin working on your Form, you must define Field Types. Click the Manage Field Types button on the Catalog Manager screen. If the Form Manager screen is currently displayed, click the Back button. The Manage Field Types button is in the Action column.

The Field Type Manager will show a table containing at least one entry. This entry is Priority. Priority is one of the seven predefined rm^{s} fields. It is also one of the four mandatory fields. You may rename Priority by clicking the Edit button in the Action column. The only attribute that you can change for Priority is its name. If you wish to change the values for Priorities, click the Items button. The table shows the currently available values. To rename or change the active status of an item, click Edit. To add an additional Value, click Add and fill in the form. Order No controls the order in which values are presented to the user.

To add a Field Type, click the Add button on the Field Type Manager screen. Assign a name and select the type. Combo boxes are single select, drop down lists. Click Save. Enter items as described above.

When you are finished defining your Field Types, use the Back button to return to the Catalog Manager screen.

You can add, delete, rename or make a value inactive by going to the Field Type Manager, selecting the Field Type and clicking the Items button. Add, Delete or Edit the values as desired. All Form fields in the Catalog using the Field Type will reflect the changes.

4.3 Building Your Request Creation Form

Navigation: Configuration -> Catalogs and Forms -> Service Catalog Manager -> Manage Forms -> Workflow -> Edit

The Request Creation form defines the information that the User must supply when entering a Request. The form starts with seven (7) predefined fields. They are:

Name - The description of the Request
Priority - The urgency of the Request
Creator Name - The name of the person entering the Request. rm^{s} automatically fills this field in with the User's name.
Last Update - The data the Request Create form information was last update. rm^{s} automatically fills this field in with the current Catalog standard time.
Request Type - A means of identifying the content of a Request.
Action(s) - Allow 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.
File Upload - Allows uploading of files to support the request.

All of these fields may be renamed as described below. All except Request Type are default

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to Active.

To build the Request Creation Form, click the Workflow button under the Action column for your Form. If the current screen is the Catalog Manager, click Manage Forms again. If you did not use a Form Template, you will see the seven fields described above. You may rename any of the these fields. However, you may not make any of the first four fields Inactive. Request Type, Action(s) and File Upload are optional. You may change the active setting by clicking on the Edit button in the Action column for its row. Click the Active radio button and click Save.

To create additional fields, click the Add button. You will now see a form for specifying the new field. The items are:

- **Order No** - The display order in the Request Creation form.
- **Name** - The display name of the field.
- **Description** - Descriptive text displayed to help the user fill in the field.
- **Secured** - Data storage is encrypted and value is always display in emails as ** Secured **
- **Required** - The User must supply a value.
- **Type** - Type of data accepted. Here are explanations of the types.
  - **Short Text** - Up to 255 characters with special characters permitted.
    - **Specify email format** - Checks to see if the supplied value is of the form user@mail_server
  - **Long Text** - Unlimited length text
  - **Number** - A numeric value in the long real range for your database
  - **Date** - A date of the form mm/dd/yyyy
  - **Radio** - A radio button field using one of your Field Types. Select the correct one from the drop down list.
  - **Check Box** - Same but for check box fields
  - **Combo Box** - Same but for combo boxes.
- **Active** - Make this field active or inactive

Fill in the data and then click Save.

Repeat this process until you complete your Request Creation form. You can rename this Step by clicking the Edit button.

rm^{s} fields may be renamed at any time and you can add or drop fields. If you add or drop a field, old Requests will continue processing as before.

To see what your form will look like, click Preview on Workflow screen.

4.4 Adding Steps

Navigation: Configuration -> Catalogs and Forms -> Service Catalog Manager -> Manage Forms -> Workflow -> Edit

Workflows are constructed of Steps. Steps specify activities in the fulfillment process and should reflect those work activities. While rm^{s} supports Branches to Sub-Workflows and Common Workflows, these are beyond the scope of this document. See the rm^{s} Administrators' Guide to learn how to use them.

To add a Step, click the Add button on the Workflow screen for your Catalog. The screen

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will now display a form for creating the new Step. The fields are:

- **Name** - A name for the Step.
- **Property** - Select as many as needed to meet your needs. The meaning of each selection is:
  - **Approve Request** - Allow Users to review and approve this request to the next Step in the Workflow.
  - **Cancel Request** - Allow Users who have permission to Cancel a Request at this Step.
  - **Comment Request** - Display a long text field so the Request Reviewer may add text to explain their review of the Request.
  - **Assign User(s) for the Next Step** - Displays a list of users who have permission to review the Request at the Next step. A list of check boxes for each one will appear. The Request Reviewer must select one or more with the check boxes before approving it.
  - **Specify Action(s)** - Same as Action(s) on the Request Creation form.
  - **Upload File(s)** - Same as Upload File(s) on the Request Creation form.
  - **Creator or System Admin Review** - Email Notification for this Step will be limited to the Request Creator or System Administrators
  - **Record Users Who Receive Email** - Generate a list of all users sent emails by rm^{s} when this step is approved
  - **Time Tracking** - Enable time reporting for this step.
  - **Trigger Reminder** - Send out reminder emails if a Requests remains at a step longer than specified.
- **Return Step** - If required by the logic of your Workflow, select a Step for routing incompletely or incorrectly fulfilled Requests.

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Top Level Intro

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

Part V

5 Users, Administrators and Workers

Once you have defined Forms, add Users to rm^s. Decide whether the User will only work on one Catalog or multiple Catalogs. If they will only work on one Catalog, make them Local Users otherwise make the Global Users. Only System Administrators may create Global Users. If you are using rm^s as an ASP product, you may only create Local Users.

5.1 Defining Users

Configuration -> User Management ->Users

Each person using rm^s must be defined as a User. Go to Configuration, User Management and click Users. In the table, locate the row with your Catalog and click the Local Users button. The Local Users Manager screen will open. The table contains the name of all Local Users. To change any attributes of a Local User, click the Edit button. To add a new Local User, click the Add button below the table. The Add/Edit User screen will open. Fill in the form. Passwords are case sensitive. User names are not. Neither allows spaces. Any field marked with an asterisks (*) is required.

In the last section of the form, you will see the following fields.

- **Format Date** - Specify the date display format. USA dates are mm/dd/yyyy. English dates are dd/mm/yyyy.
- **Email Notification** - This is the format of the emails the user will receive. HTML emails are highly formatted. IT OnTime recommends them as they are easy to read. However, if your email server or client is configured so it cannot receive HTML emails, select Text using the radio button.
- **Long/Short Email** - Long emails display all the Step reviews for a Request. Short emails show the Request Body Information for the Request and the most recent Approval action only.
- **Allow Email On/Off** - If yes, then the User can turn emails on or off unless blocked at a particular step.
- **Active** - If yes, the User can log in. If no, the User is blocked from logging into rm^s and will not receive notification emails.

System Administrators will see two additional ways to create users. These are covered in the rm^s Administrators' Manual.

5.2 Define Administrators

Navigation: Configuration -> Administrators -> Catalog, Task and User Administrators -> Manage

Once you have defined Users, you can define other Administrators. Administrators control rm^s and Requests. There are four classes of Administrators.

- **System Administrators** - Can see everything within the instance of rm^s.
- **Catalog Administrators** - Can see everything within a single rm^s Service Catalog.
- **Task Administrators** - Can see all Requests within an rm^s Catalog but cannot change the structure of Requests or Forms.
- **User Administrators** - Can add, delete or mark users Inactive.

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If you are a System Administrator, you can create other System Administrators or Catalog Administrators. If you are a Catalog Administrator, you can create Task or User Administrators within your Catalog. If you are a Task Administrator, you can create User Administrators.

To create Administrators, go to Configuration. To create System Administrators, click System Administrators under Administrators. If you are not a System Administrator, you cannot do this. On the Administrative Permissions screen, click the Manage button. The top table is the list of System Administrators. The bottom list contains the list of Global Users who are not Administrators. Check the box next to the name(s) of the Users who you want to make System Administrators. Click the Add to Current List button. If you want to make any Local Users System Administrators, select their Catalog from the drop down. Users from that Catalog will now populate the lower list. To remove a User from the System Administrator class, check the check box next to their name and click the Remove from Current List button.

To create Catalog, Task or User Administrators, click Catalog, Task and User Administrators under Administrators. If you are a User Administrator, you will not see this menu option. The table on the next screen will contain from one to three items depending on your Administrative class. Click the Manage button under Actions for the correct Catalog. The Admin Manager screen will contain a table with entries for all classes of Administrators you can create. Click the Add/Remove button for that class. The form works as described above except that if you are a Catalog or Task Administrators, you will not see the Local Users/Global Users radio button. To remove a User from the their Administrator class, check the check box next to their name and click the Remove from Current List button.

5.3 Assigning Step Privileges

Navigation: Configuration -> Service Catalogs and Forms -> Service Catalog Manager -> Form Management -> User Assignment

Before Users can create and review Requests, they need Step Privileges.

To assign these, click Service Catalogs and Forms under Catalogs and Forms. Click the Form Management button for the correct Form. Click the User Assignment button for the correct Form. You will now see the User Assignment screen with a table showing all the Steps in the Form. To assign users to a Step, click the Users and Groups button. A screen showing two tables of users will now open. The Users in the upper table already have Step privileges. The Users in the bottom list do not.

To assign one or more users, click the check box next to their name. If this is not a Request Creation step, the form will contain a table for giving the User five permissions. The User permissions are:

- **Read** - The User may look at a Request but not take any Action on it.
- **Update** - The User can review the Request, add Comments, Action(s) and Upload Files if defined for the Step and Approve or Return it.
- **Cancel** - If permitted, the User may Cancel the Request.
- **Allow Email On/Off** - The User may turn receipt of email on or off for the step. If set to Yes, the settings in the User's profile prevails.
- **Receive Email** - The User receives emails if checked. If unchecked, they do not. If permitted by Email On/Off, they can change it.

Once the Permission check boxes are set, click the Add to Current list button.

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If you want to remove Step privileges, click the check box next to the name in the upper list and click Remove From Current List.

For more information and other ways to assign Step privileges, see the rm^{s} Administrators' Manual.

5.4 Defining Workers

Configuration -> User Management -> Workers

Workers are a special class of users within rm^{s}. They are enumerated for the purpose of recording time that they worked on Requests but have no privileges. As such, they cannot log into rm^{s}. Go to Configuration, Users, Workers. The Assign Workers screen will open. The table contains the name of all Workers. The top list are workers assigned to a Catalog if one is selected. The bottom contains all Workers not assign to the current Catalog. To change Worker attributes, click the Edit button. To add a new Worker, click the Add button below the table. The Add/Edit Worker screen will open. Fill in the form. Any field marked with an asterisks (*) is required.

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Endnotes 2... (after index)

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Back Cover