Request Management System Version 2.3 Readme

Installer Differences Between Personal Web Server and IIS Server Installation

The rm^s Setup program operates differently for Personal Web Server and IIS Web Servers. In Personal Web Server, the rm^s folder must be in the INETPUB/WWWROOT folder to work correctly. rm^s Setup creates a Virtual Directory under Default Web Server. On IIS Web Servers, you can locate the rms folder on any accessible disk drive. rm^s Setup creates a Web site using the name supplied to the installer. If you are using unique IP addresses for Web sites on the Server, then rm^s is ready to run. If you are using Hosts files and Host Name Headers, you will need to make those changes before running rm^s.

rm^s and Permissions

rm^s requires one writeable folder to store uploaded files and Access databases if you choose to use them. If rm^s does not run or you get an error indicating that rms could not write information, then the permissions may be wrong. Check that Write permission is set for the UploadFiles folder in Internet Information Services Manager. Check that the Anonymous Internet user has Modify, Read & Execute and Write permissions for the UploadFiles directory. rm^s setup uses "Special Permissions" to do this. You can also use the rm^s Diagnostic utility to check this by typing the rm^s URL\diagnostic in a Web browser.

Running rm^s for the first time

You will need to set certain system parameters the first time you start rm^s. After you start up rm^s after an install, it displays the Database and Tools screen. It has four settings. If you are installing the Demo version, you just need to click the Save button. For an explanation of this screen, see the rm^s Administrators' Manual section System Configuration, Database and Tools.

Once the login screen shows up, type rmsadmin into the Username box and rmsadmin into the Password box. If successful, you will see the rm^s main screen. Click configuration on the top right. On the configuration screen, click Users. On the Users screen, click the Edit button to the right of rmsadmin. Change the password by entering a new password and confirming it. Click the Save button. IT OnTime recommends this because all copies of rm^s start with the same rmsadmin password.

Troubleshooting rms After Installation

If rm^s generates errors when you start rm^s for the first time, they are generally permission errors. To help you diagnose the problem, your rm^s folder contains a sub-folder named Diagnostic. Open a Web browser and type in the rm^s URL followed by /diagnostic. It will give you a basic status report of the condition of your rm^s installation.

Please check the following:

Make sure that your Web site or Virtual Directory permissions are correct in IIS Management. There is a reported issue with permissions in IIS. This error is general to all Web sites on the effected computer and not specific to rm^s when it occurs. The solutions on the Microsoft Web site do not work however; IT OnTime has suggestions to correct permissions for rm^s. This error will generate an Invalid Script Language error. This will also manifest itself as an Error 500 – Internal Server Error. If this condition exists, Diagnostic will also fail with the same error.

If you get an error 240, the IIS cache and browser caches are corrupted in some subtle way. Restart IIS and then delete Temporary Internet Files on affected machines.

If you get a Cannot Write message or some similar error from rm^s, then permissions are set incorrectly for the UploadFiles folder. Please make sure that IIS shows the folder as having the read and write attributes set. Please make sure that the Anonymous Internet User has update, read, execute and write permissions for the UploadFiles folder. You can also use the rm^s Diagnostic utility to check this by typing the rm^s URL\diagnostic in a Web browser.

Email Notifications

For the rm^s email notifications to work properly, your computer needs to be able to communicate with an email server. This is required to deliver the emails to users. rm^s sends these emails from the local machine but is not involved in receiving them.

Certain email clients block pictures from loading when viewing emails unless explicitly allowed. This will cause red X marks to appear instead of the graphics. You can download the graphics by following the directions on the screen.

If the rm^s Demo version is set up using localhost as the Web server, HTML emails viewed on another computer will not display the header and footer correctly. Normally, HTML emails display the following header

However, if you display the email on another computer, a red x displays, since the header file is not accessible to the email viewer. This is normal behavior you will observe when reading any email with an embedded graphic while offline.

The footer will behave the same way. The content is not affected. Text emails are not affected.

This can be resolved by assigning an IP address to the default Web site in IIS. All emails sent after assigning the IP address will display the headers and footers. You also need to change the rm⁵ Start menu item. You will also need to make this change to share the rm⁵ Demo with your co-workers. Please contact your network administrator(s) for assistance in this area.

Templates

The demo version of rm⁵ comes with the following Templates.

> Web Site
> Application Bug Reporting
> Application Enhancements
> Purchase Order

To use the Templates, specify one of them when creating your Form.

Limitations in the Demo Version

The Demo version of rm⁵ is limited to:

> 1 Project
> 3 Forms
> 5 Users

It can only use Microsoft Access as its database.

The Web server and the database must reside on the same computer. You can still access rm⁵ from a remote computer using a browser if you configure IIS or Personal Web Server correctly. Please contact your network administrator(s) for assistance in this area.

The Demo license allows for a 90-day trial period.
This version is otherwise a fully functional copy of rm⁵.

New Features in Version 2.3

Request Dashboard – This widely requested enhancement enables Administrators to get a snapshot of Requests. The rm⁵ Administrators' Manual documents its usage.

Export a CSV file – Certain request information can now be exported to a CSV file that other products can read or import.

Improved ADSI Synchronization – These changes improve ADSI Synchronization to assure that rm⁵ always correctly reflects the current status of all users. A side benefit is better performance.

USA and English Date Formats – Each user can select their preferred date format – either USA style (mm/dd/yyyy) or English (International) style (dd/mm/yyyy). These are reflected in all displays, print outs and emails for the user. The user can change their preferred date format at any time and all dates will reflect this change.

Email Reminders – A new step attribute causes rm^s to issue reminder emails periodically at intervals specified when defining the step. These serve as a reminder to request reviewers and fulfillers that work is awaiting their attention.

Save Incomplete Approvals – Users can now enter partial request approval information and save it. They can later complete the approval information and either Approve or Return the request.

Catalog Specific Support – Administrators can define a support message and provide a support email address. When a user clicks support, rm^s will open a Web form for the user to fill out. Once the user completes their support request, rm^s emails the form to the specified address.

XML Schema File – A user can optionally create an XSD file for use with XML file rm^s produces.

Assign Users Enforced – When users are assigned to a step with Request Approval, these assignments are now enforced. Users not assigned will have read only access to requests.

Creator Review and Request Creation - If a step has the Creator or Administrator Review attribute selected, rm^s now checks to make sure that the user can create Requests for that form.

Reporting Improvements – See the rm^s Users' Manual for more details.

> **Expanded Search by Request Field** – Searches on Request fields have been greatly enhanced to allow searching on multiple fields using AND/OR logic. Radio button, check box and pick list field types provide a drop down of allowable values. Date and numbers have less than, less than or equal, equal, greater than or equal and greater than logical operators.

> **Combining of Request Field value and Request Attribute Searches** – Request Value and Request Attribute fields can now be combined by AND or OR operators. This provides more control over searches.

> **Search for Worked on By** – A new request search criterion allows searching for users who worked on Requests.

> **New Columnar Report Type** – This report type provides for flexibly selecting columns to display or print.