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The Request Management System Users Guide

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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Special thanks to:

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

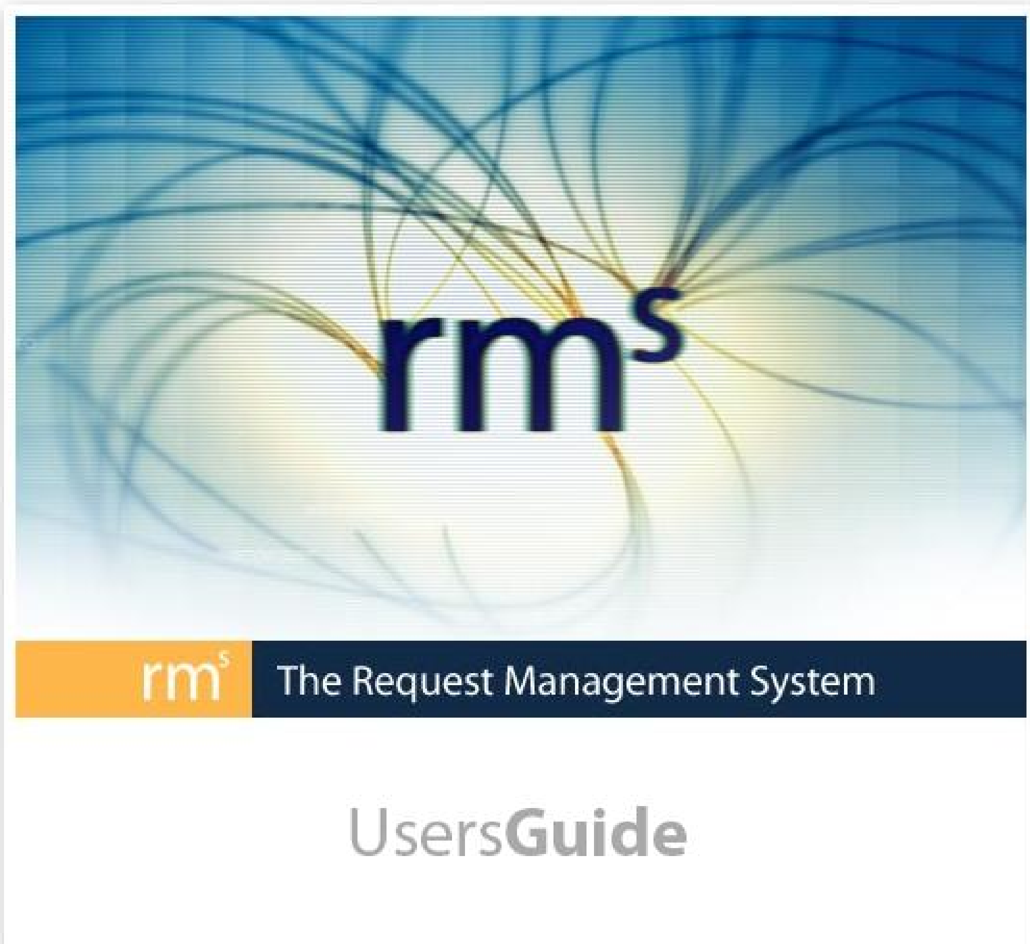
This is just another title page
placed between table of contents
and topics

Top Level Intro

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

Part I

1 Welcome to The Request Management System



The Request Management System (rm^{s}) is a tool for creating and tracking Service Requests. You will be able to access Service Catalogs designed to meet your needs. Within the Catalog, you will see a selection of Forms. After selecting a Form, you will fill out a screen to create your Request. After you submit your Request, rm^{s} generates emails to anyone who needs to know about your Service Request to complete the work or anyone who controls the work. You will receive email notifications as work progresses on your Requests. At any time, you can log into rm^{s} and see the status of all your Service Requests.

If you are a person fulfilling Request rather than creating them, rm^{s} also provides help. You will be notified when work arrives in your queue. Everything you need to work on is presented in standardized ways as defined by your organization. Instead of spending time collecting service requests submitted in random ways through different media, rm^{s} is your single source for all Requests. This allows you to focus on the work at hand rather than guessing what work might need doing.

rm^{s} works through an Internet browser such as Microsoft Internet Explorer. An rm^{s} Administrator will give you the URL, username and password that you need to access rm^{s}.

Use this version of the manual if you are using Version 2.3 of rm^s or higher. Some features documented here are not available in prior versions.

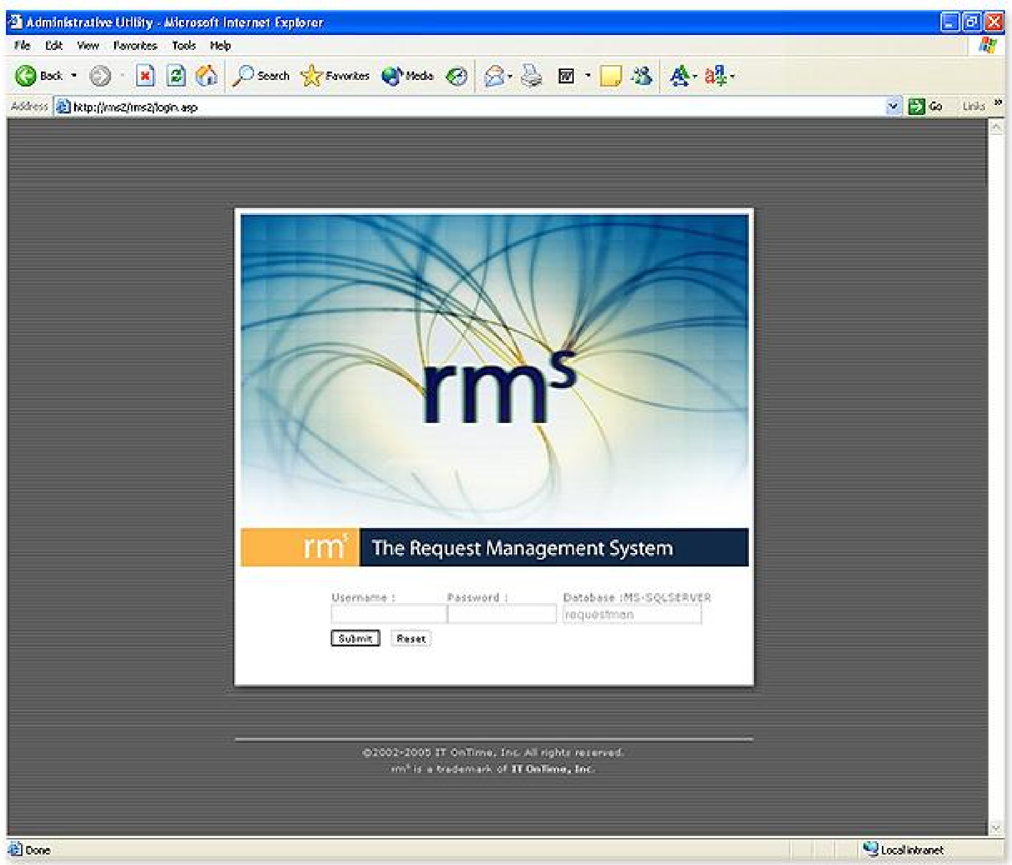
Designed and Developed in Thailand by IT OnTime, Inc.

[****]

1.1 Logging In

To access rm^s, start a Web browser such as Microsoft Internet Explorer. In the Address box of the browser, type the URL provided to you by your Administrator. The browser will display the following screen.

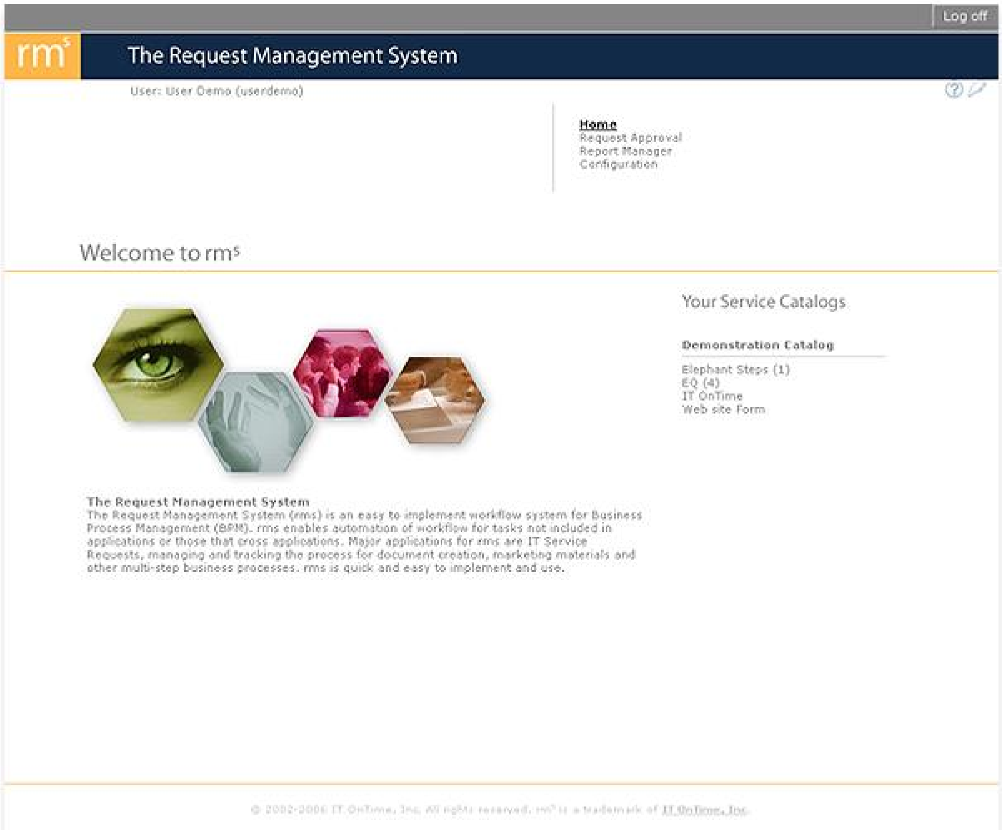
Figure 1.1 - rm^s Login Screen



To log in, type your username in the box labeled username and password in the box labeled password. Remember that passwords are case sensitive. If you have Caps lock on or do not capitalize when required, rm^s will not recognize your password. Click the Submit button. Your rm^s username and password maybe the same as your network username and password. Please ask you rm^s Administrator for your correct log in credentials.

If successful, the browser will display the following screen. Some details may differ such as the list of Service Catalogs that you can access. The message text may be different. This can be customized for your installation.

Figure 1.2 - rm^s Main Screen

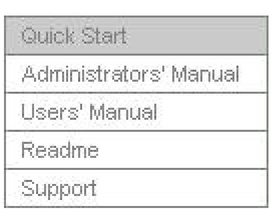


This is an important note. Since rm^s relies on pop-up browser windows to operate, you should enable pop-ups for the rm^s URL if you are using pop-up blocking software. Also, Ad Blockers can misinterpret certain screen update actions. You should disable ad blocking for your rm^s URL. Certain toolbars such as the Earthlink Toolbar do not allow rm^s to operate properly. You may need to uninstall any toolbars to use rm^s.

1.2 Getting Help

To get help within rm^s, go to the top of any screen and click the question mark (?). It is located on the far right. Once you click on the ?, a menu with a number of items will open. If you are an Administrator, it will contain the following 5 entries.

Figure 1.3 - Administrator Help Menu



If you a User who is not an Administrator, it will contain the following 2 entries.

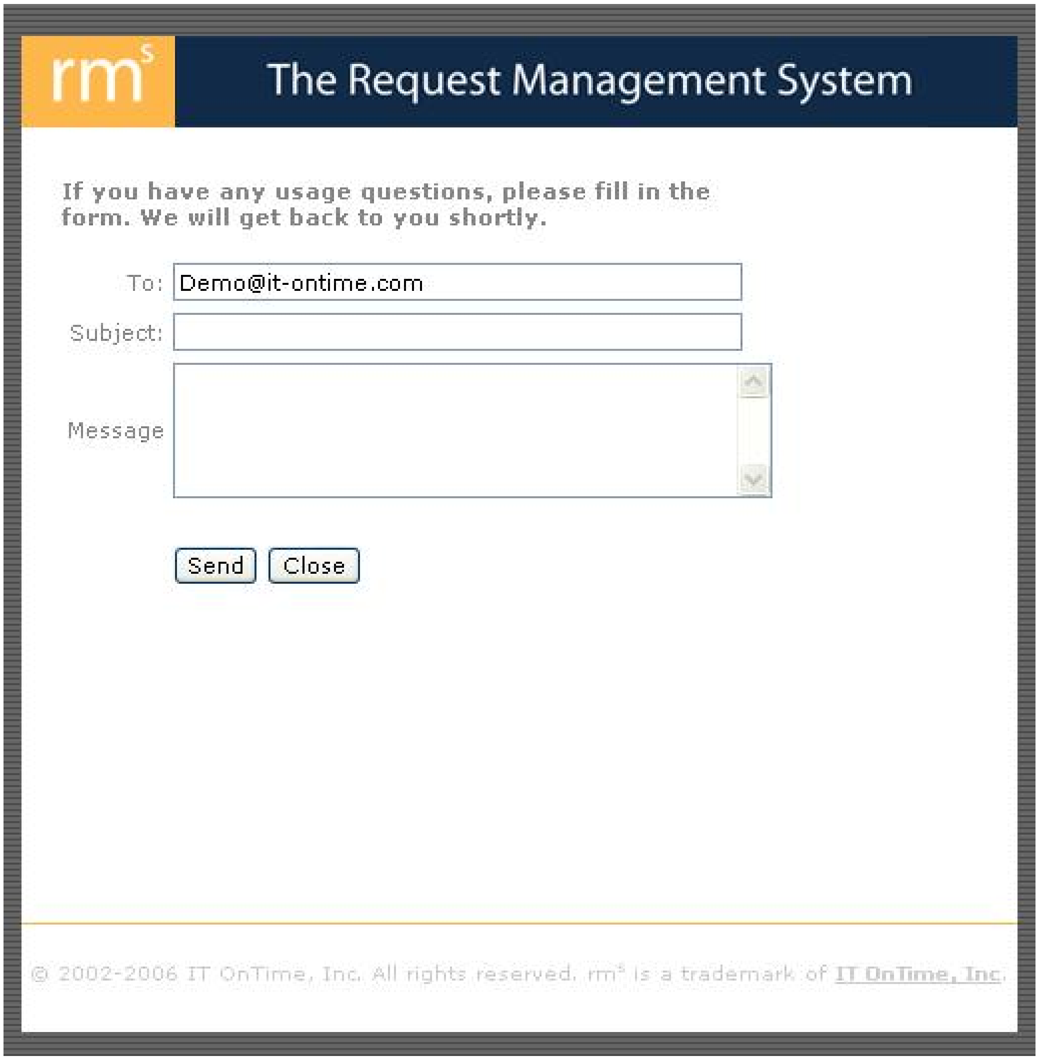
Figure 1.4 - User Help Menu

Users' Manual
Support

Clicking on the titles of any of the manuals or the Readme file will open that document. Clicking on Support will do one of two things.

If your rm^s Administrator specified Support for you Catalog, you will see Web form to fill out as shown below.

Figure 1.5 - rms Help Form with Administrator Supplied Text



To use this form, fill in the blank fields and click Send.

If your rms Administrator did not create specialized support for your Catalog, click on Support will open an email using your email client with Support@it-ontime.com already in the To line.

1.3 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.

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.

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 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.

Top Level Intro

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

Part II

2 The Main Screen

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

Figure 2.1 - Main Screen

The screen has two main interest areas. At the top, a bar with three entries. They are: the currently logged in user; the question mark (?) which is the help button; and the small feather which is the About button. This bar appears on all rm^s screens except for Pop-up windows.

This is an important note. Since rm^s relies on pop-up browser windows to operate, you should enable pop-ups for the rm^s URL if you are using pop-up blocking software. Also, Ad Blockers can misinterpret certain screen update actions. You should disable ad blocking for your rm^s URL. Certain Toolbars cause erratic behavior of pop-ups and screen updates. Please uninstall toolbar software if rm^s exhibits erratic behavior.

Immediately below this bar is the navigation for areas of interest within rm^s. If you are a User, it will contain four entries:

Home - Returns you to this screen.
Request Approval - The rm^s function for creating and reviewing Requests. See

Request Approval.

Report Manager - The Report Manager allows you to view all of your own Requests or export them to an XML file. For detailed information see The Report Manager.

Configuration - The rm^s function for changing your login details and email notification settings. See Configuration.

Administrators will see additional functions. These are discussed in the rm^s Administrators' Manual.

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

Immediately to its right is "Your Service Catalogs." This is the list of rm^s Service Catalogs that you can access. The Catalog name is underlined in bold type. Below each Catalog name is the list of Forms you may access. If a number appears in parens () next to the Form name, you have active Requests that you can view. What this means and what must do is discussed in the section of this document, Request Approval.

Top Level Intro

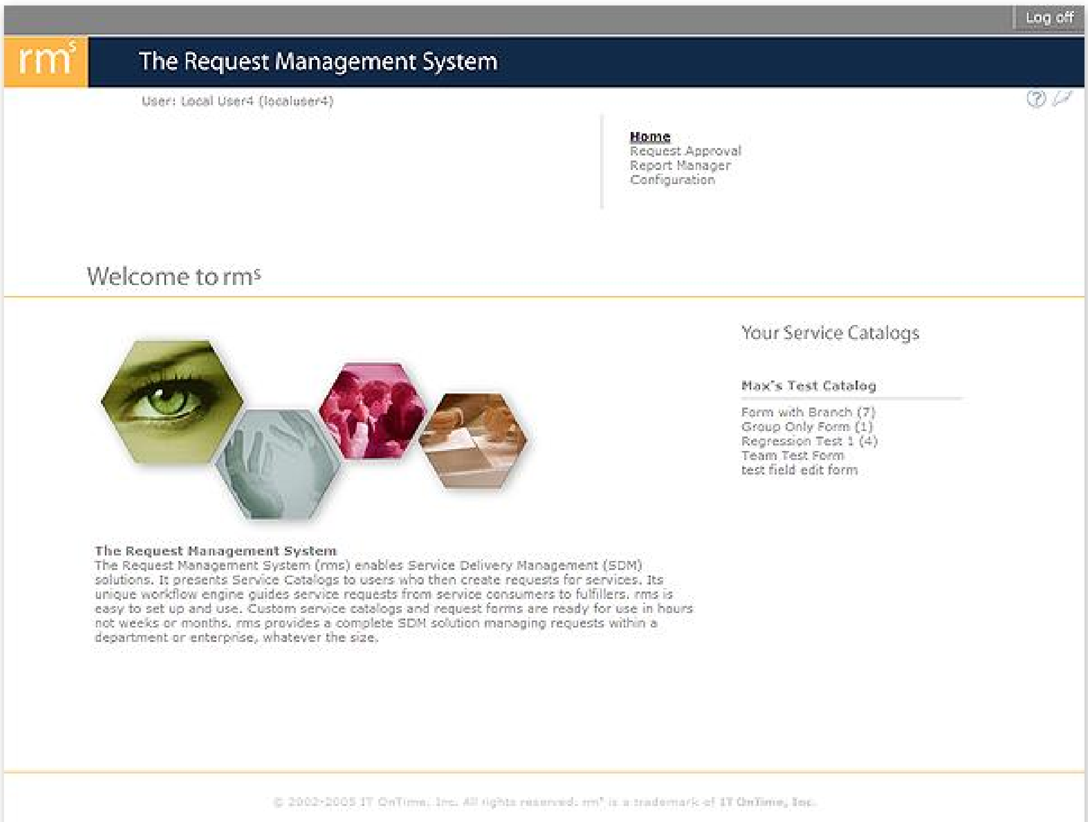
This page is printed before a new
top-level chapter starts

Part III

3 Request Approval

The heart of rms is the Request Approval process. You can access Request Approval in either of two ways. First, you can select a Form by clicking on its name under Your Service Catalogs on the rms main screen. Alternatively, you can click on Request Approval on any rms screen.

Figure 3.1 - Your Service Catalogs

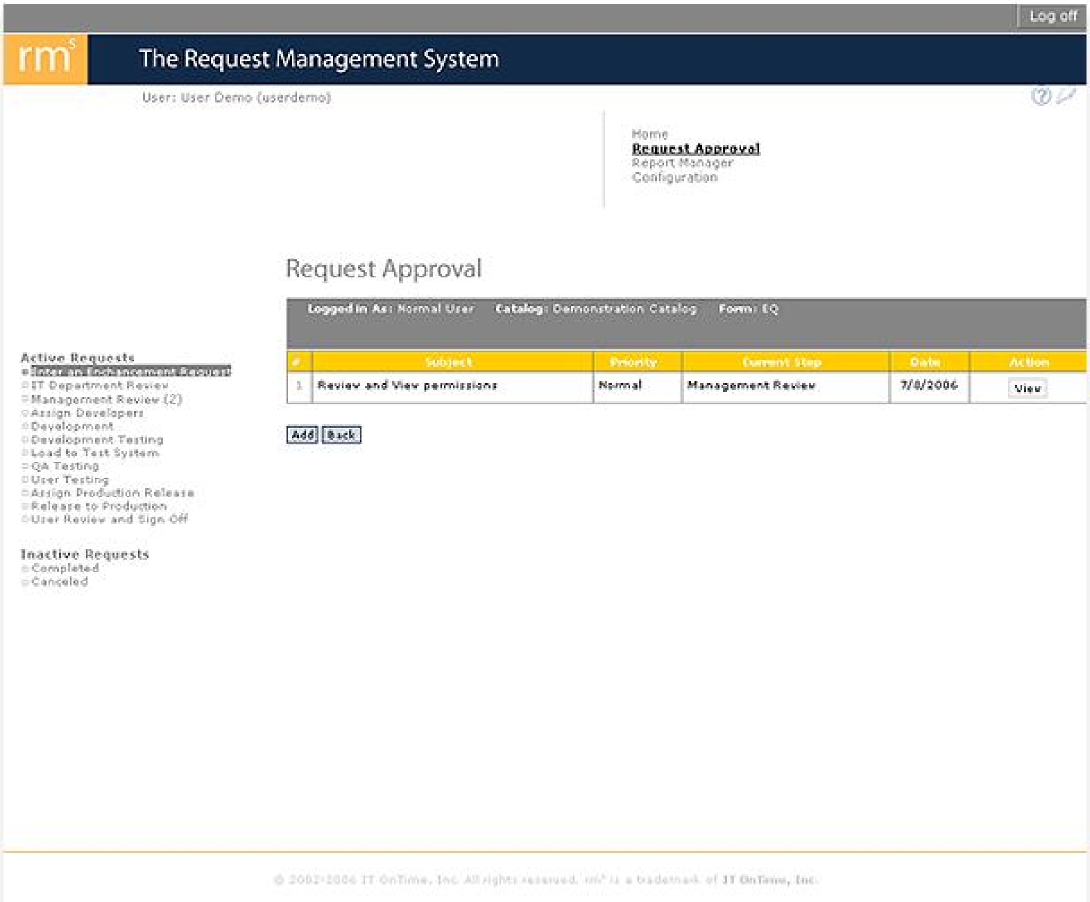


The following screen will appear if you clicked on Request Approval. It has a list of Catalogs and Forms that you are allowed to access within rms.

Figure 3.2 - The Request Approval Selection Screen

The list of Catalogs and Forms you can access appear on the left. When you click on any Form name, you will see the Request Approval screen for that Form. If you clicked on a Form name on the rm^s main screen, you will see the same screen.

Figure 3.3 - The Request Approval Screen



The screen contains five areas:

1. The rm^s information bar at the top.
2. The rm^s navigation menu at the top right.
3. The heading Active Requests lists the steps you are authorized to access. If a number in parens () appears next to the step name, that is the number of Requests that you may access at that step.
4. Three items appear under Inactive Requests:
   Completed - Your completed Requests
   Canceled - Your canceled Requests
   Archives - (System, Catalog and Task Administrators Only) - Completed and Canceled Requests sent to an Archive area.
   If any of your Requests are in these areas, a number in parens () will appear next to the word. You can access these Requests by clicking on any of these. If you cannot create Requests in the Catalog, you will not see this area.
5. The middle of the Requests Approval screen contains your Request list. It will differ depending upon which item in the left column is currently highlighted.

The following sections explain this area of the screen in detail along with activities related to this screen.

Creating a Request

[Reviewing a Request]
[Inactive Requests]

3.1 Creating a Request

One of the two main activities and in fact the reason for rm^s in the first place is creating Requests for Services. Requests may be for your Web site or computer application; they may move reports from origination through review to production or may track Customer Service Requests. The type of Request and its work flow are determined when setting up rm^s.

A Request may contain:

- A description and priority
- Instructions to locate where the work will take place.
- The type of work required.
- Detailed instructions for the work.
- Lists or descriptions of items required to complete the work.

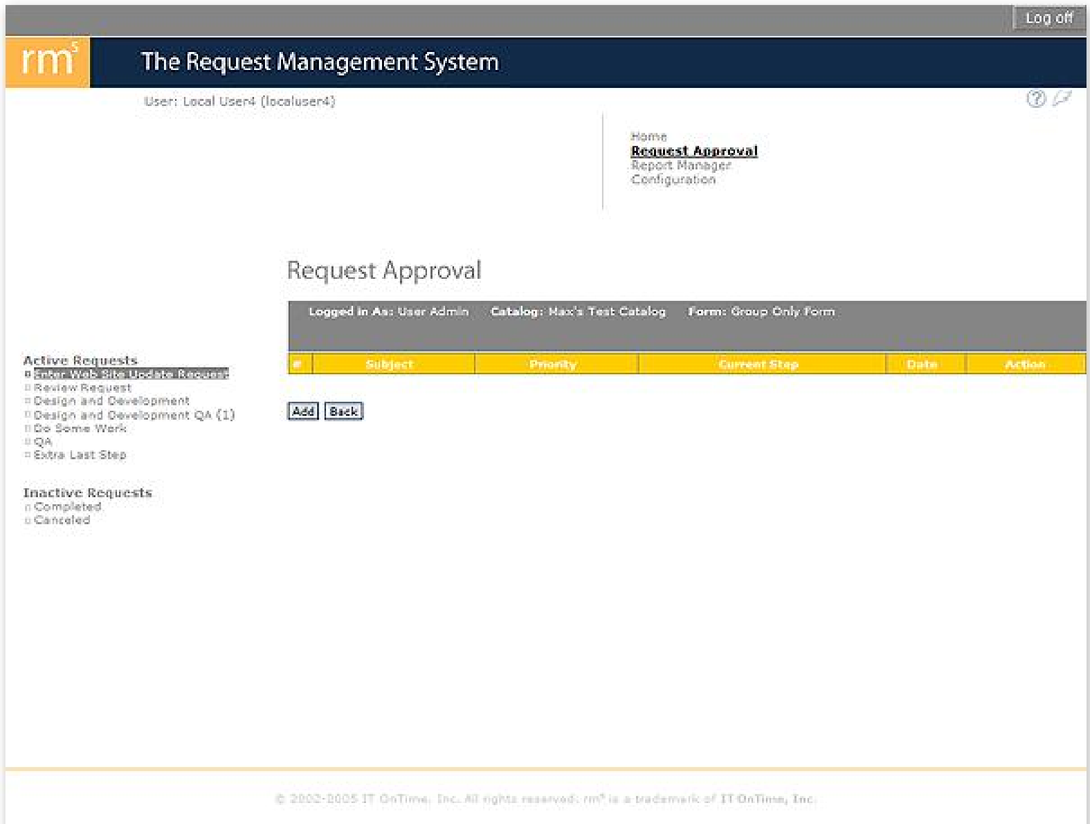
Or whatever your rm^s Administrator determines is needed to define Requests.

rm^s uses familiar desktop tools for creating requests. The Request Creation Form use text boxes, drop-down lists, radio buttons, check boxes, dates, action specifications and attachments. Anyone who uses the Internet, Microsoft Outlook or Microsoft Word will know the mechanics of using these screens.

To get to the screen, click on the first step in the list. It should have a name that implies creating a Request. You may not have permission to do this. In this case, you will not see anything described in the remainder of this section. If so, skip to Reviewing a Request. If you do not have permission to create a Request and feel that you should, contact you rm^s Administrator for information about this. Permissions to use rm^s are controlled by your Administrators.

If you have permission to create a Request, you will see a screen similar to this one.

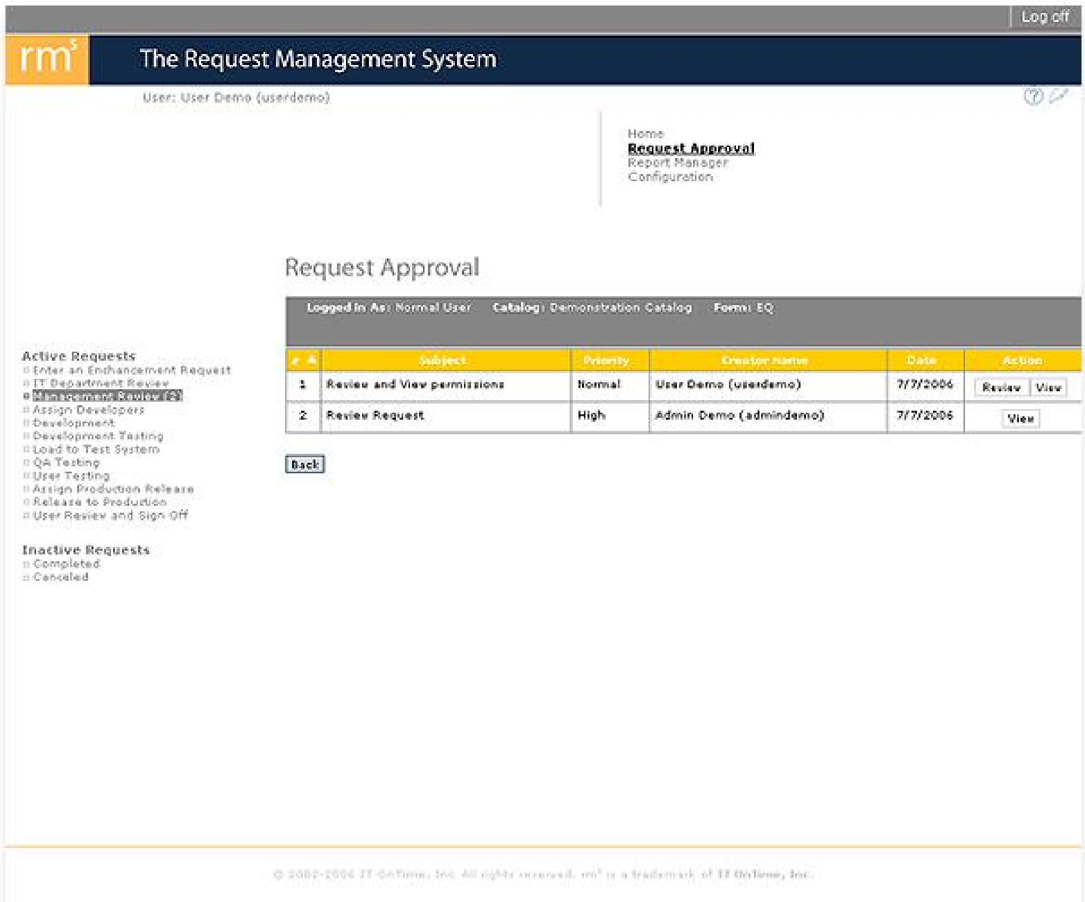
Figure 3.4 - Opening the Create a Request Step



The screen contains the familiar top bar and the activities menu. In the menu, Enter Web Site Update Request is highlighted indicating that it is the current step on display. Names of steps may differ for your Catalogs and Forms.

On this screen and all other Request Approval screen, you may sort the Request list. If you click on the label at the top of a column, the display will now appear sorted by that column. When you first click the column, it will sort the list in ascending order. Click again to change the order to Descending. A small triangle will appear next to the label to indicate the direction of the current sort.

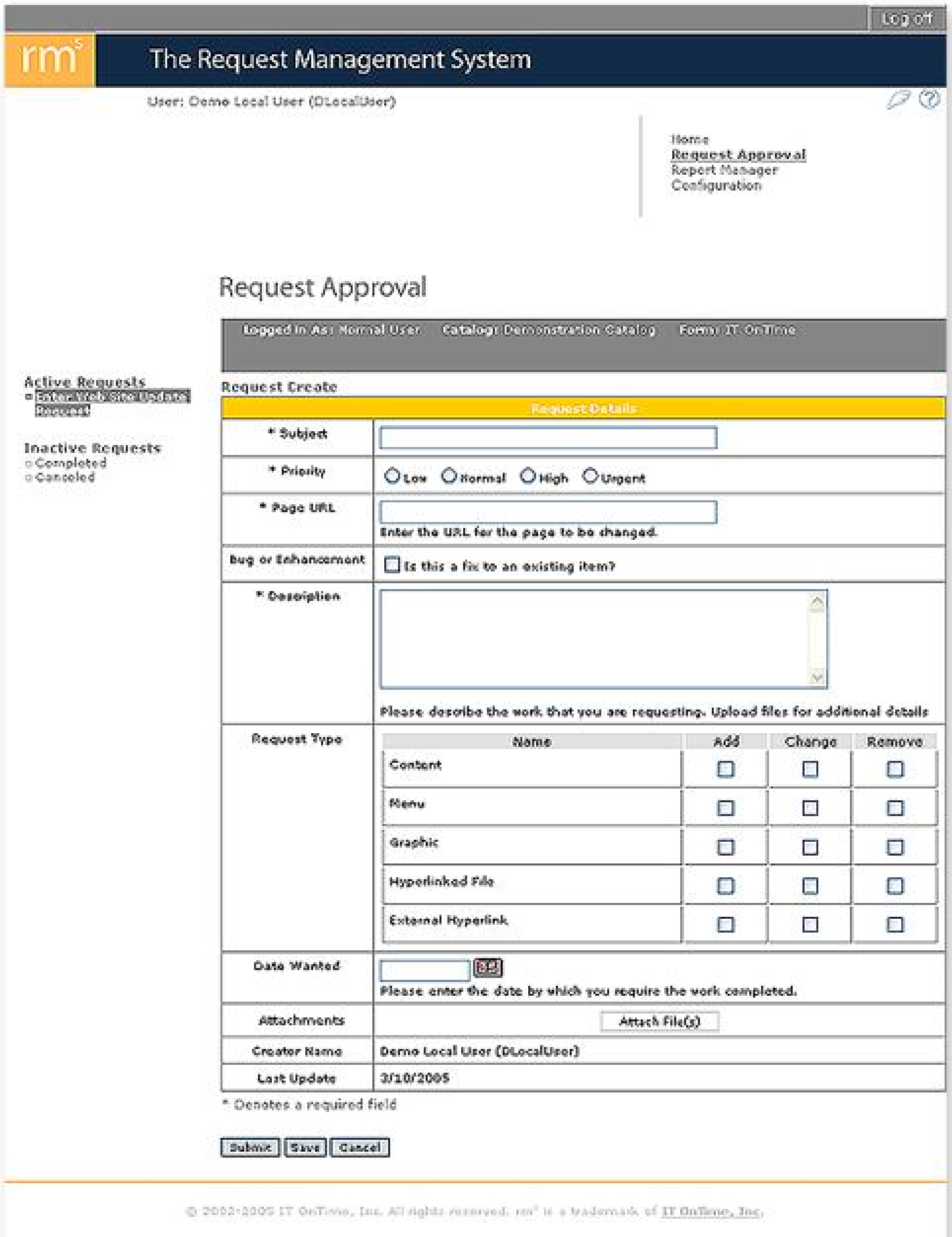
Figure 3.5 - Sorted Request List



The main screen area now displays all of your Active Requests. To see the details of the Request, press the View button. The information presented will be discussed in the next section, Reviewing a Request. If you have created and saved a Request but not already submitted it, the last column will display Edit and Submit buttons. If you click the Edit button, you may edit the Request and then submit it for fulfillment. To submit the Request for fulfillment without modifying it, click the Submit button.

To create a new Request, click the **Add** button. Your browser will now display a screen similar to this one. Its details may differ as one of the principal features of rm^{s} is customization of Request information.

Figure 3.6 - Create a Request Input Form



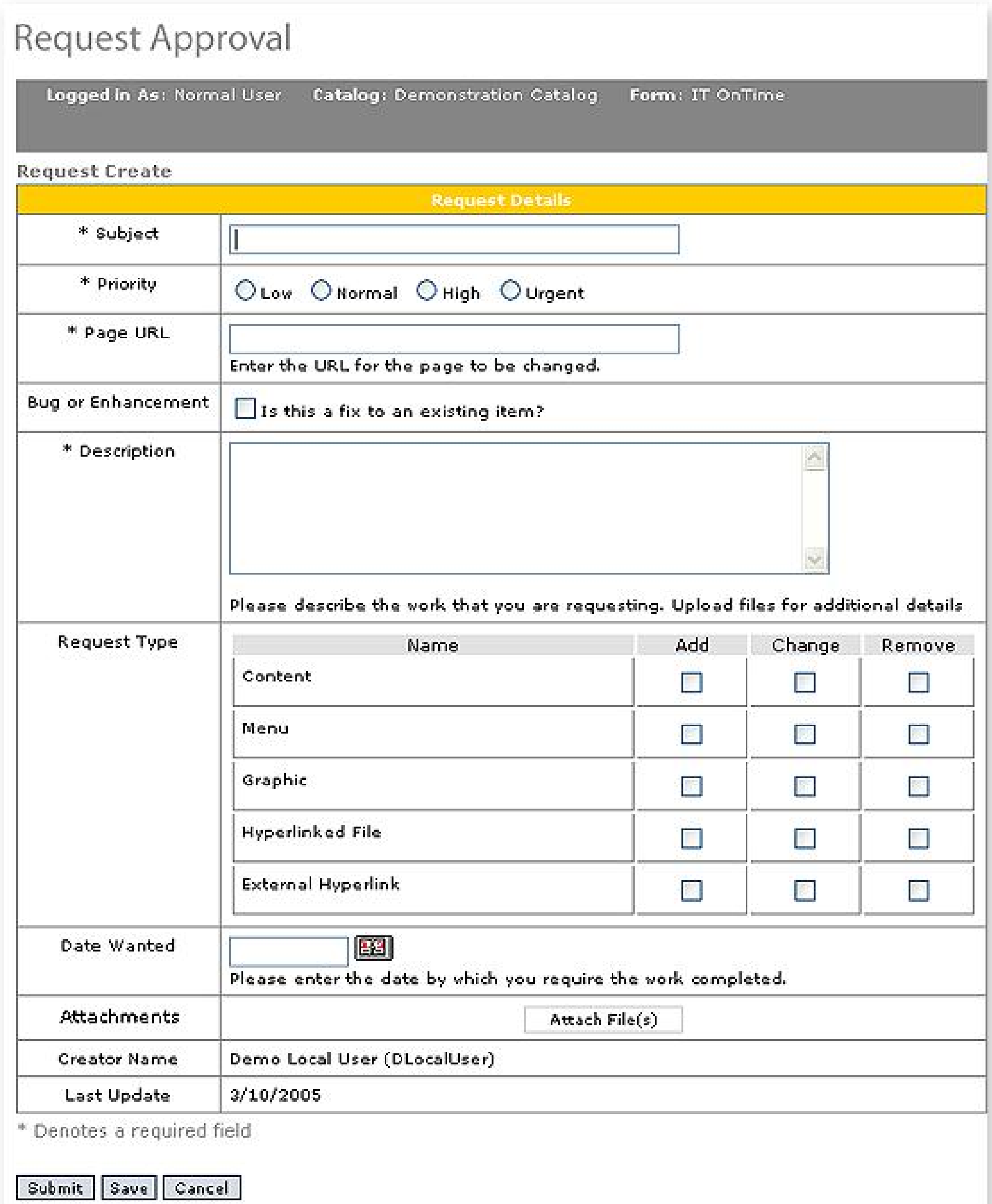
The next section describes the Request screen. The following section provides guidance in creating a Request.

3.1.1 The Request Input Screen

The previous section shows how to access the Request Input Screen. If you have clicked the

Add button, you will now see a screen similar to the following screen.

Figure 3.7 - The Create a Request Input Form



This screen is from the IT OnTime template Web Request. It is the Create a Request screen for a New Feature. The screens in your system may differ slightly or substantially. This manual will focus on using each type of input. Once you have learned how to manipulate each field type, using your screens should be simple.

rm^{s} provides the following types of fields:

Short Text - Up to 255 characters of text. Any characters are permitted.

Figure 3.8 - Sample Short Text Field

Email Text - An email address of the form name@url. For example, sales@it-ontime.com is valid.

Figure 3.9 - Sample Email Field

Long Text - An unlimited number of characters. Any characters are permitted. Long text fields are easily identified by the scroll bar on the right. They will be grayed out until your input exceeds the size of the box and then automatically activate.

You can cut and paste into these fields but any document formatting such as that found in Microsoft Word documents will be lost.
Use Attachments discussed later for submitting documents with complex formatting.

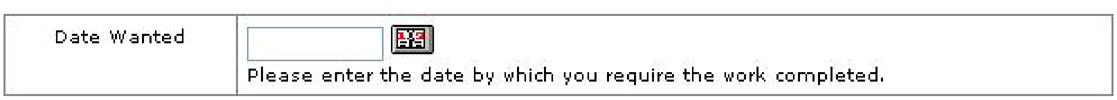
Figure 3.10 - Sample Long Text Field

Number - Any valid number. It may be an integer without a decimal point or a decimal value.

Figure 3.11 - Sample Number Field

Date - Any valid date in the format of mm/dd/yyyy. If you only input two digits for the year, it will assume that the year is between 1930 and 2029. You can use the Calendar tool to select a date. After you click the Calendar icon, a Calendar window will open.

Figure 3.12 - Sample Date Field



To select a date in the calendar, click on the date. The left << goes back a year. The left < goes back a month. The right > goes forward a month. The right >> goes forward a year.

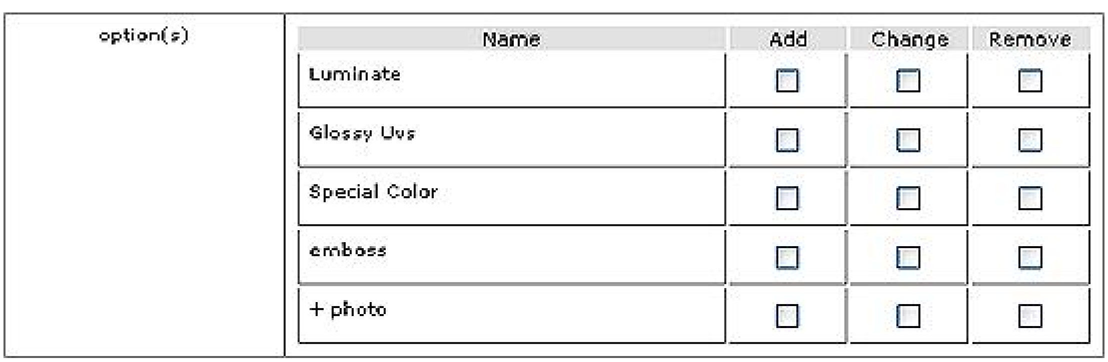
Figure 3.13 - Calendar

Radio Button - A radio button allows you to select one item from a group of items. Click on the round button to the left of item you wish to select to choose that item. Radio buttons are customized for your rm^{s} Catalog and Form. The selections you see may be different than those in this manual. To clear a radio button selection, press the Space bar.

Figure 3.14 - Sample Radio Button

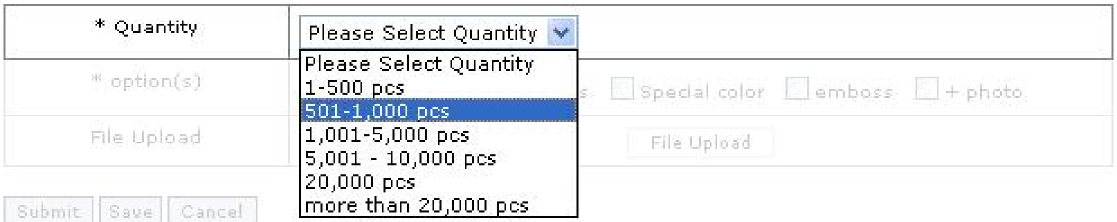
Check Box - Check boxes are a series of items that you may select. They allow you to select any number of choices from the selections offered to you. Select an item by clicking the square box next to it. Unselect the item by clicking on it again. Check boxes are customized for your rm^{s} Catalog and Form. The selections you see may be different than those in this manual.

Figure 3.15 - Sample Check Boxes



Combo Box - A list of items determined for your rm^{s} Catalog and Form by an Administrator. Click on the down arrow and then select an item from the list by clicking on it. A Combo Box only allows one selection at a time. If you make more than one selection, only the last item selected is saved.

Figure 3.16 - Sample Combo Box

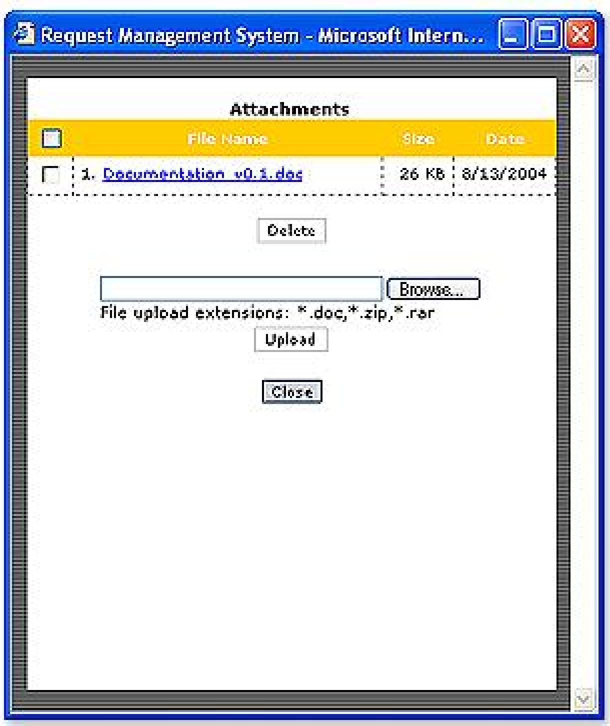


Attachments - Attachments allows you to associate files with the Request in much the same way that you would attach files to an email using Microsoft Outlook. To attach one or more files, click the Attach File(s) button.

Figure 3.17 - Sample Attachments

After clicking on the Upload Files button, you will see the following screen.

Figure 3.18 - Attachments Screen

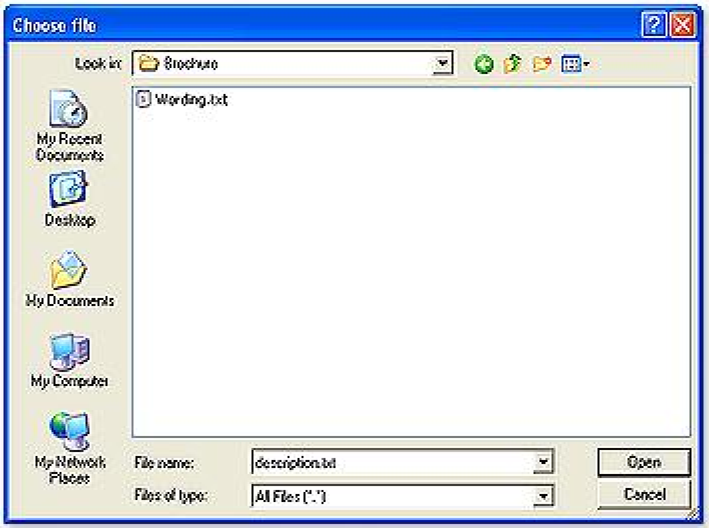


This screen contains two areas:

Attachment(s) lists all files currently associated with this Request. When you first see this screen for a Request, this list will be empty. If you have already attached one or more files, they will be listed in this area. If you wish to delete an Attachment from your Request, click the check box next to the file name and then click the Delete button.

Immediately below the Delete button is a text box for entering the name of a file you wish to upload. If you know the exact path and file name, you may type it into this box. Most of the time, you will click the Browse button. It will bring up a standard File Browser window just like Microsoft Outlook does. Between the box containing the file name and the Upload button is a list of File Inclusions or File Exclusions. If the list says File upload extensions, you can submit files with the specified extensions. *.* allows all files. If the list says File upload exclusions, you may not submit files with the specified extensions. This list is determined when your Administrator sets up your rm^s Catalogs and Forms.

Figure 3.19 - File Browser Window (Microsoft Windows XP)



Just as you would do in Microsoft Outlook, find the file you want to upload and then click Open. The text box will now contain the file path and name. Next click the Upload button. After clicking Upload, you will see the following window.

Figure 3.20 - File Upload Progress Monitor

Once the file upload completes, it will automatically close.

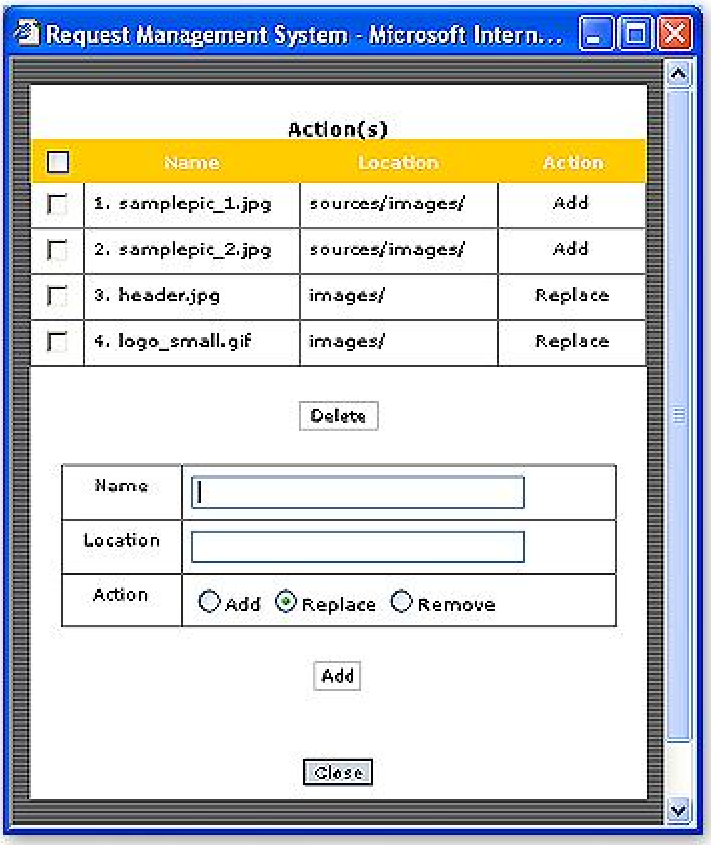
If your file uploaded successfully, it will now appear in the Attachments list.

Actions - Actions allows you specify changes you want made for your Request. For example, if you had an image on your Web site and you know the name and location of the file, you would specify that information in actions. At the same time, you might specify the replacement. If you were working with a document, you might have several pages you wanted removed and replaced with other pages that you uploaded.

Figure 3.21 - Sample Actions

You specify actions by clicking on the Action button. The following screen will now open.

Figure 3.22 - Actions Screen



Like the Attachments screen, the Actions screen is divided into two sections. The top section contains previously specified actions. You can delete any specified Action by click the check box on the left and then clicking the Delete button. You add Actions by filling in the Name and Location and specifying the Action using the radio button. After you have completed this, click the Add button. The Action details will now appear in the list at the top of the screen.

Now that we have looked at types of fields you may encounter in a Request Creation Form, the next section will discuss a sample screen.

[Submitting a Request]

3.1.2 Submitting a Request

Figure 3.23 shows the same sample Create a Request screen that you saw in The Request Input Screen section. As you can see, it contains fields as described in the previous section. Each field with an asterisk (*) to the left of the name is a Required field. This means that you must supply information, select a radio button or check one or more check boxes before you can submit the Request. Also, all required fields must be filled in before adding Attachments or specifying Actions.

Figure 3.23 - Sample Create a Request Screen

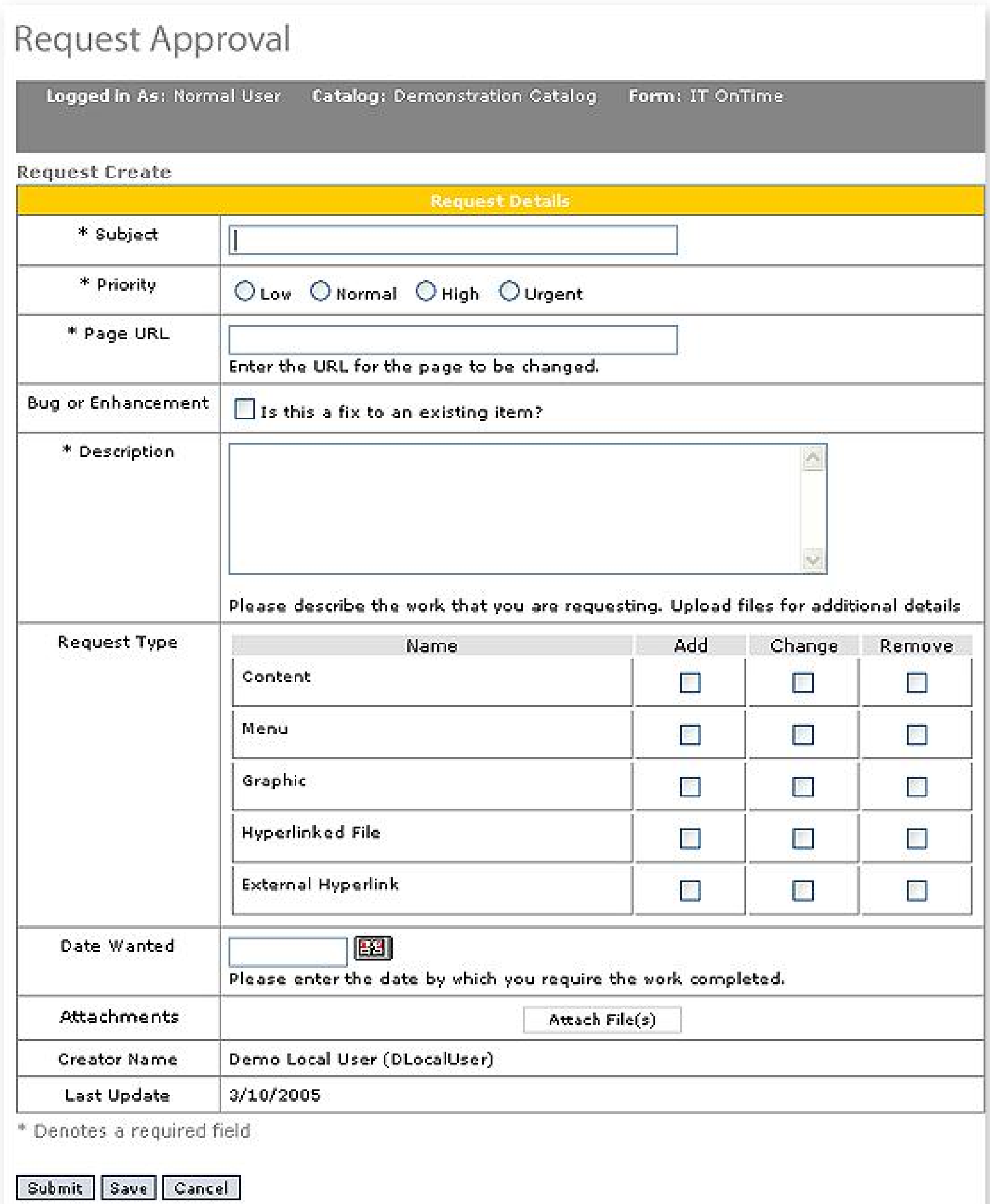
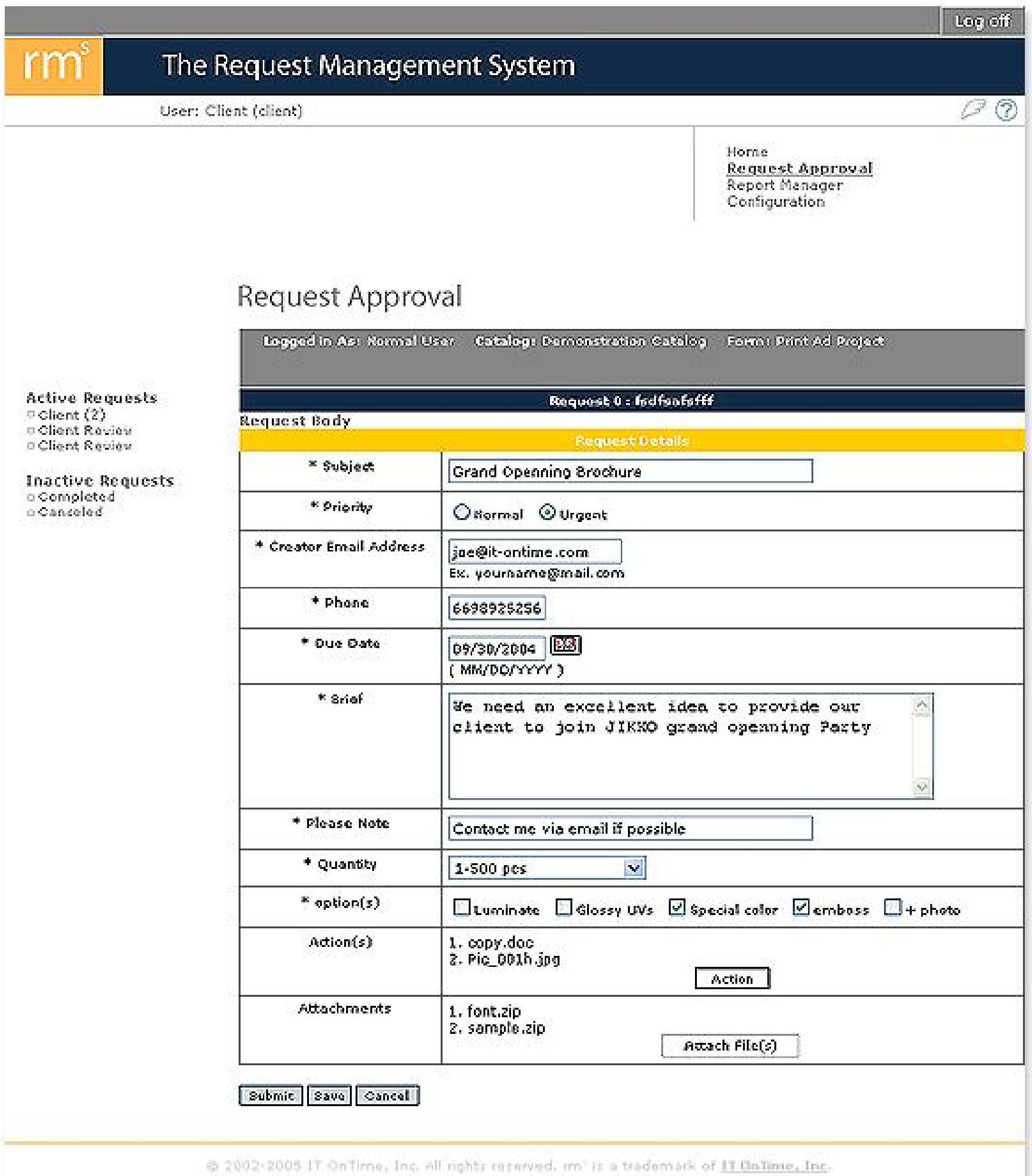


Figure 3.24 shows the same screen filled out with two Actions specified and two Attachments. You can see that all sections look the same except for input data with the exception of Actions and Attachments. They will now contain the list of Actions created and the list of Attached File (s).

Figure 3.24 - Completed Sample Create a Request Screen



You can now modify any of your input before submitting the Request. Once you have done this, you can select from one of three possible actions:

1. Submit - Dispatches your Request towards fulfillment. This sends your Request along the workflow defined for your Catalog and Form. You will receive the following confirmation message box.

Figure 3.25 - Request Confirmation Screen

2. Save - Saves your input to the Request Creation Form but does not dispatch the Request for fulfillment. Use this if you wish to gather and add more information to your Request or if you need to interrupt your session. You can later return to the Request by clicking on the Edit button that will appear next to it on your Create a Request list.

3. Cancel - This discards any input for this Request. After clicking the Cancel button, you will see the following confirmation screen. If you confirm your desire to Cancel, all input for this Request will be lost. If you were Reviewing a previously created Request, all changes will disappear.

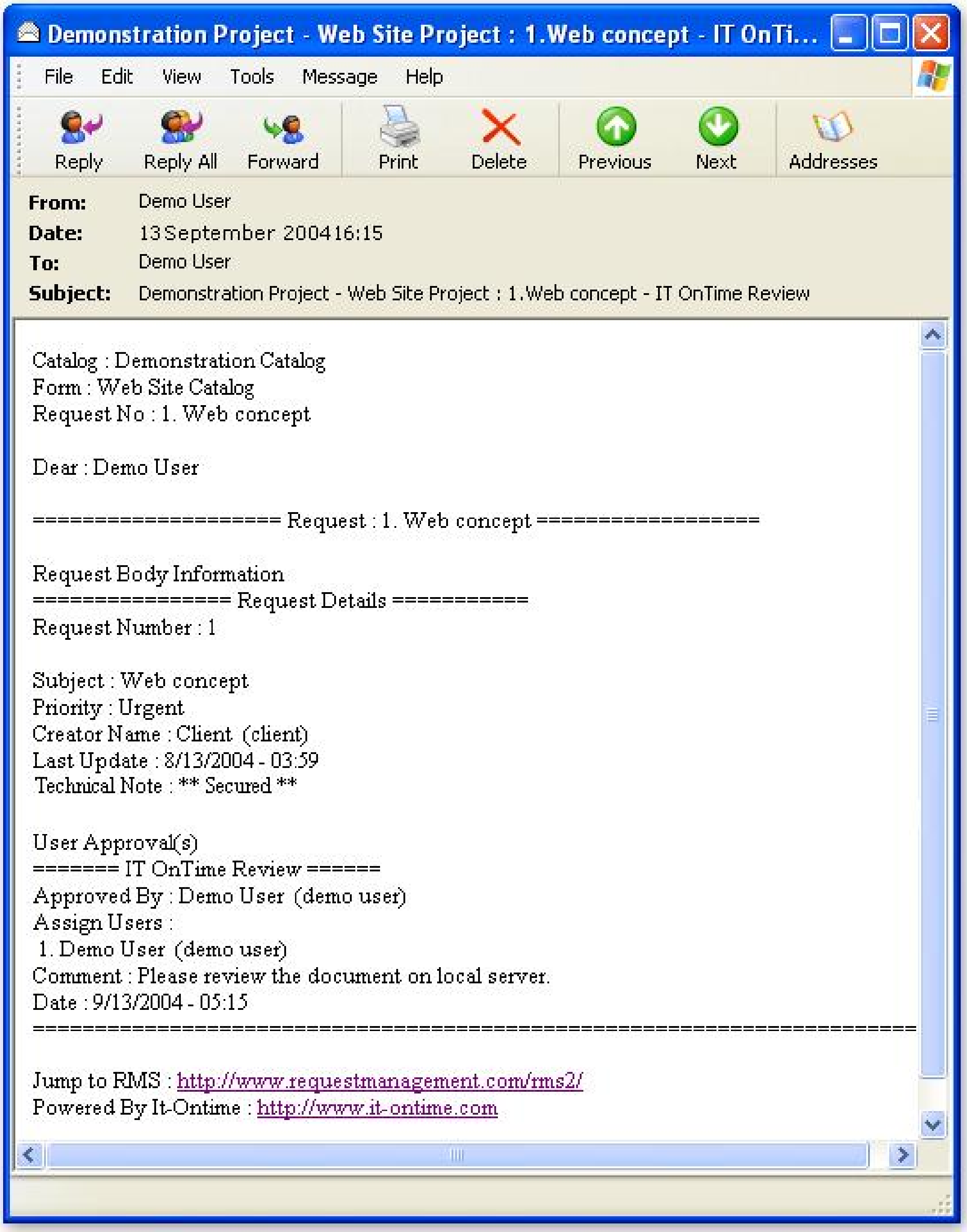
Figure 3.26 - Cancel Request Input Confirmation Screen

After you Submit your Request, you will receive an email confirmation. If you selected HTML email in your Configuration, it will look like this.

Figure 3.27- HTML Email

Or the email will look like the one in Figure 3.28 if you elected to receive text emails.

Figure 3.28 - Text Email



Catalog : Demonstration Catalog
Form : Web Site Catalog
Request No : 1. Web concept

Dear : Demo User

=================== Request : 1. Web concept ==================

Request Body Information
=============== Request Details ===========
Request Number : 1

Subject : Web concept
Priority : Urgent
Creator Name : Client (client)
Last Update : 8/13/2004 - 03:59
Technical Note : ** Secured **

User Approval(s)
======= IT OnTime Review ======
Approved By : Demo User (demo user)
Assign Users :
1. Demo User (demo user)
Comment : Please review the document on local server.
Date : 9/13/2004 - 05:15
===

Jump to RMS : http://www.requestmanagement.com/rms2/
Powered By It-Ontime : http://www.it-ontime.com

If you see ** Secured ** as the value of a Field, this is not the real value. ** Secured ** is displayed to show that an encrypted field value exists. rm^s does not display values of Secured (encrypted) fields in emails.

3.2 Reviewing a Request

Anyone who is defined for a Step in the workflow can view Requests at the Step. If your Administrator has given you permission to update a Request, you can review a Request and approve the Request or possibly return it for rework. Once you have logged in and selected the Catalog and Form from the Your Service Catalogs, you will see screen similar to the following screen.

Figure 3.29 - The Request Approval Screen

The screen and how it works is described earlier in this chapter.

If you clicked on Review Request, you will see a screen similar to that shown in *Figure 3.30*. It contains the same main features as the previous screen. However, two things are different. The current step is highlighted in the Step list on the left. A table displays containing information about Requests currently at this step. This table has six columns. Five are identifying information and the sixth contains the Action button(s).

Figure 3.30 - Request Manager for Request Review

If you see both a Review and View button, you can Review and Approve the Request for further action. If you only see a View button, you can look at the Request but not approve it. Figure 3.31 shows the Request Review screen.

Figure 3.31 - Request Review

The screen begins with a section labeled Request Body. This is the information originally supplied by the Request Creator and any edits to that information. You can access any Attachments by clicking on the file name. It is a hyperlink to that file. This allows you to see all the information originally supplied when the User created the Request.

How file are opened is controlled by settings on your computer. Contact your Desktop Support personnel for questions regarding display of files.

Immediately following this information is a section labeled Your Approval. This section is for your use in reviewing the Request to see if meets the requirements of the current step. Depending upon the workflow defined for the Form, you may be able to do any of the following:

1. Define Actions for this step. This is the same as defining Actions when creating the Request as previously described.
2. Add Attachments at this step. If you have additional documentation such as pictures, screen captures or Microsoft Word documents that will enhance the explanation of your review, you may attach them.
3. Comment on the Request at this step. You may provide an explanation of your review or other helpful explanatory materials. Try not to use this to redefine the Request. You should Edit the Request (Administrators only) or create another Request if the scope of the Request changes significantly.
4. Enter Time Tracking data.

Figure 3.32 - Time Tracking

Time Tracking	Time Tracking

For details, see Tracking Time Worked

5. Select a Branch - If the next possible steps in the workflow are the main workflow, one or more branches and Common Forms, you will need to select one of the workflow steps. You will see a radio button before each one. Select the appropriate one by clicking on its radio button. An example of this is shown in Figure 3.33.

Figure 3.33 - Select Branches

Next Step	◯ Creative Group Head ◯ step 1 (*Branch One*)

6. Assign People at the next Step. You may be asked to assign work at the next Step to one or more people. If you see a list of names with a check box next to each name, you must check at least one of the boxes. An example of this is shown in Figure 3.34.

Figure 3.34 - Assign Users

Assign Users	☐ Managing Director (Super MD) ☐ Demo Admin (demo admin)

7. The last item is Step Action. Depending upon the workflow for the Form and your permissions, it may contain from one to three radio buttons. These are:
   Approve - Send the Request to the next step in the Workflow.
   Cancel - Cancel the Request and move it to the Inactive category, Canceled.
   Return - Return the Request to a previous step as defined in the Workflow.

Once you have made all selections, click the Submit button to execute your choices. If you do not wish to take any action at this time, click the Cancel button. If you need to later add information about the Request and want to keep the information that you entered, click the Save button.

Since this is a newly created Request on its first Workflow step, only the Request Body and Your Approval sections appear. If the Request had previously moved through other Workflow steps, a section called User Approvals would appear between Request Body and Your

Approval. This section lists all previous Workflow steps the Request went through along with any information added by those reviewers. Figure 3.35 shows a Request with a previous User Approval.

Figure 3.35 - Request with User Approvals

Request Approval

Logged in As: Normal User Catalog: Demonstration Catalog Form: EQ

Request 4 : Test Create Request

Request Body

Request Details	
Request Number	4

Subject	Test Create Request
Priority	High
Creator Name	User Demo (userdemo)
Last Update	7/13/2006 - 21:13
Description	Test Create Request
Request Type	Screen [Add] Program Feature [Add] Data Field [Add] Report [Add] Program Logic [Add] Other [Add]
Business User	Test Create Request
Business User's Email	tor_pido@hotmail.com
Date Desired	7/2/2006
Attachment(s)	File Name: 1. tokyodrift2.jpg — Size: 11 KB — Date: 7/13/2006

User Approval(s)

IT Department Review	
Approved By	User Demo (userdemo)
Assigned Users	1. User Demo (userdemo)
Date	7/17/2006 - 18:00

Your Approval

Management Review	
Attachments	Attach File(s)
Time Tracking	Time Tracking
Comment	
Assign Users	Admin Demo (admindemo) User Demo (userdemo)
Step Action	Approve : Please select to send to Assign Developers. Return : Please select to return to Enter an Enchancement Request. Cancel : Please select to cancel this request.

Submit Save Cancel

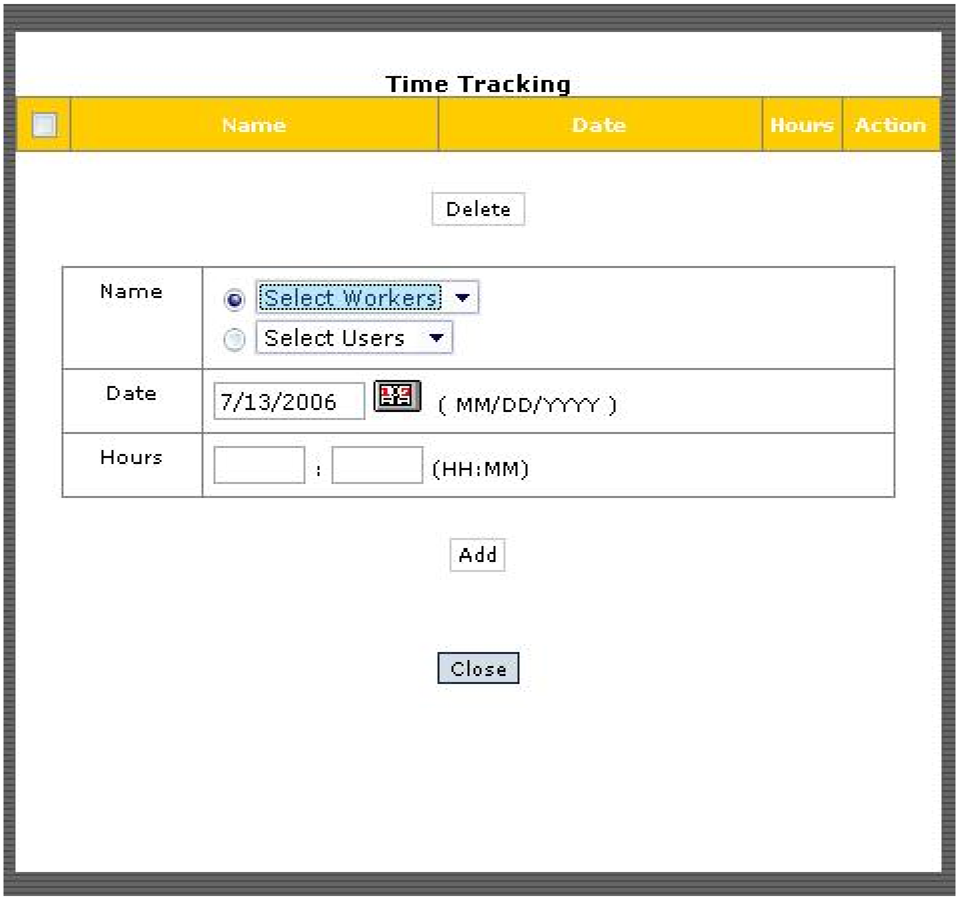
3.3 Tracking Time Worked

rm^s provides facilities to track the amount of time people spend fulfilling Requests. This is an option selected for a Step by the Administrator setting up the Form.

Time Tracking information behaves differently than all other Step approval information within rm^s in one very important way. You may enter Time Tracking information for a Step and then Cancel Approval. When you do so, rm^s will retain the Time Tracking entries. However, the time entered will not be reported nor can you view the entries except through the Time Tracking entry screen. This provides for accumulation of time reports as work is being done on a Request.

If Time Tracking is available for a step, you will see a button labeled Time Tracking. When you click this button a new screen will display.

Figure 3.36 - Time Tracking Entry



The screen is divided into two areas. The upper area displays previously entered Time Tracking information. The lower area contains the controls for entering additional Time Tracking information.

If Time Tracking data already exists for the Request, you can edit or delete that information by clicking the Edit button. This will display the following screen.

Figure 3.37 - Editing Time Tracking Entry

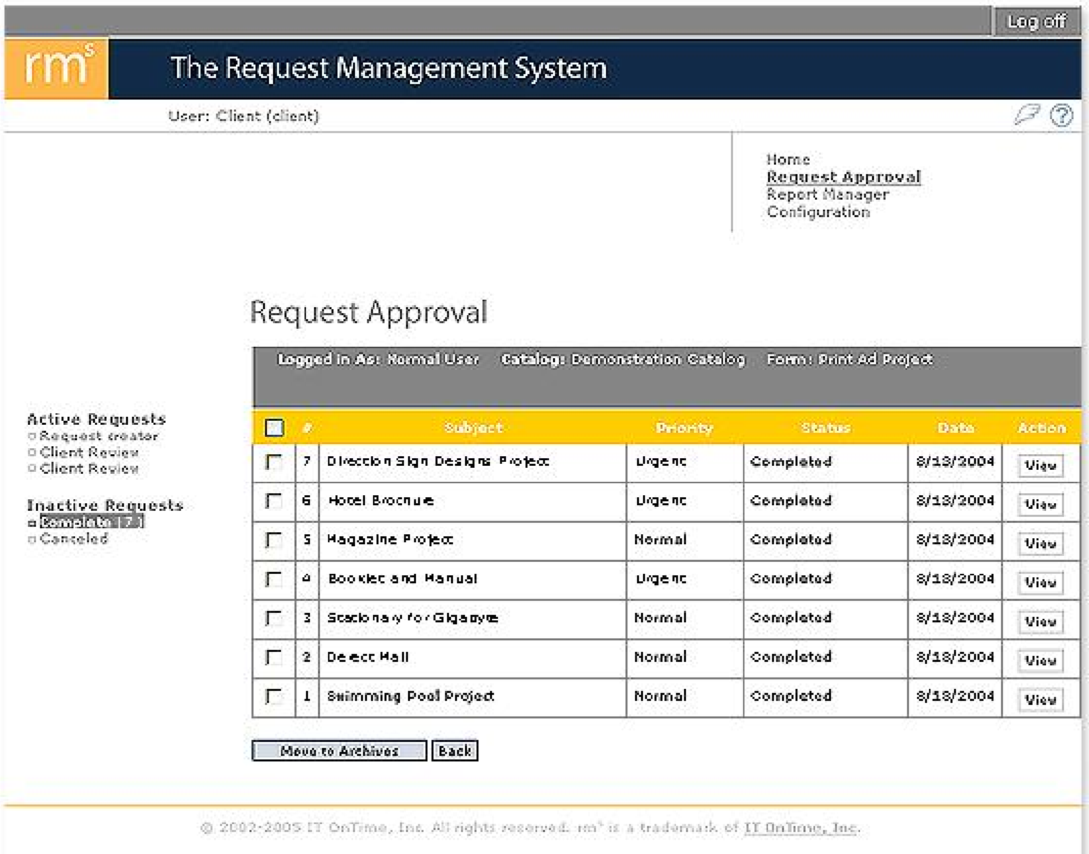
You may delete existing Time Tracking entries by clicking the check box next to the entry and then clicking the Delete button.

If you wish to enter new Time Tracking information you will need to specify the person working on the Request. rm^s allows Time Tracking for two types of users. This is reflected by the two lists. Search through the lists to find the correct person. The first list is people who are workers but not rm^s users. The second list contains most of the people working on your requests who can use rm^s. Once you have found the person, enter the date the for the Time Tracking information. You can use the calendar tool to select the date. Last, enter the time worked. Entry is in the form of hours in the first box and minutes in the second box. Minutes must be between 0 and 59. Click the Add button. The entry will now appear in the list of Time Tracking entries.

3.4 Inactive Requests

There are two User categories of Inactive Requests: Completed Requests and Canceled Requests. Requests are automatically moved to these categories. You may review all your Inactive Requests by clicking on either Completed or Canceled in the left column on the screen. When you do this, a six column table will open showing all of your Requests in either category. The only Action button available is View. You can click on this button to see the details of the Request. Figure 3.34 shows a list of Completed Requests.

Figure 3.38- Completed Requests



Top Level Intro

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

Part IV

4 The Report Manager

rm^s provides an integrated reporting and XML Export facility. Reporting in rm^s allows you to see some or all of your Requests and view or print reports about your selection. Reporting is designed to support Administrators' needs to monitor and control the Request creation and fulfillment processes. Reporting is designed to allow users to track and review the progress of their Requests. XML Export let's users or Administrators extract data from rm^s and move it to Microsoft Excel, Microsoft Access or any XML-enabled software product. Administrators can also use XML Export to move requests to other systems such as Bug Tracking or another management systems.

The Report Manager has sections:

1. **Request Selection** - The tool for selecting Requests for reporting.
2. **Request Browsing** - Look at a single Request in detail. You have the choice of looking at all the work done on the step or looking at the time taken at each step in the Request fulfillment process.
3. **Print Report** - Print information about the Request Selection both on screen and on a printer.
4. **Export Report** - Create an XML file containing the selected Requests.

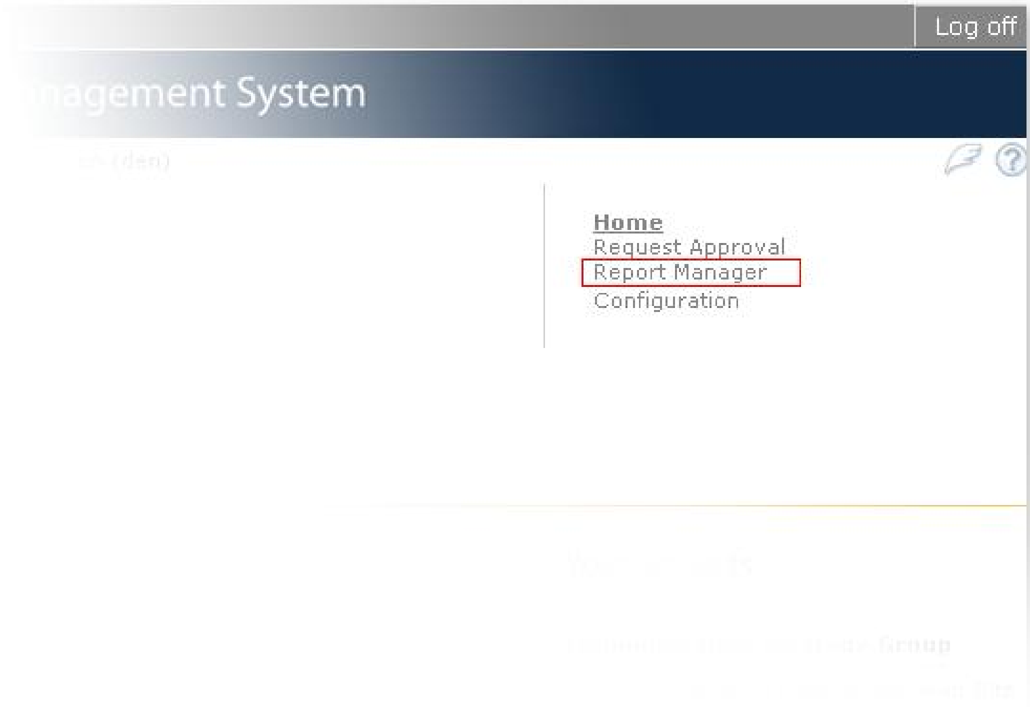
The first three sections work in two modes, Request View and Time Tracking View. XML Export only works in Request View mode. To avoid duplication, the Report Manager will be shown in detail using Request Reporting examples. The section Exporting Data to an XML File explains how to create the XML Export file and the structure of the file. The section Viewing and Reporting Time Tracking Information shows the views and reports available for this information. If you are interested in Time Tracking, review Request Selection first and then go to Viewing and Reporting Time Tracking Information.

If you wish to export selected Request information to a CSV file for use with Microsoft Excel, Microsoft Access, Business Objects' Crystal Reports and other products, see the section View and Printing Request Information. This capability is available from the 5th report type, Report Layouts.

4.1 Request Selection

To access reports in rm^s**,** click on the Report Manager in the activities section any screen.

Figure 4.1 - Accessing Reports From Main Page



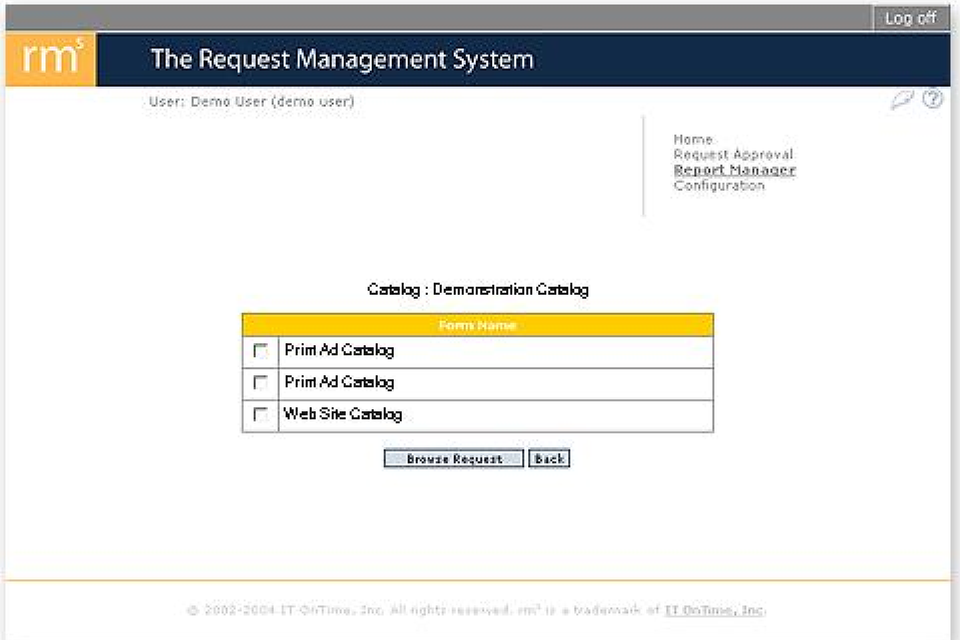
This displays the following page.

Figure 4.2 - Report Manager

This list on the left shows all Catalogs and Forms that you are authorized to access. Unlike the Request Approval screen, the Catalog name is an active link. You may click on the Catalog Name to report on your Requests across selected Forms within a Service Catalog. If you are just interested in a specific Form, just click on that Form name.

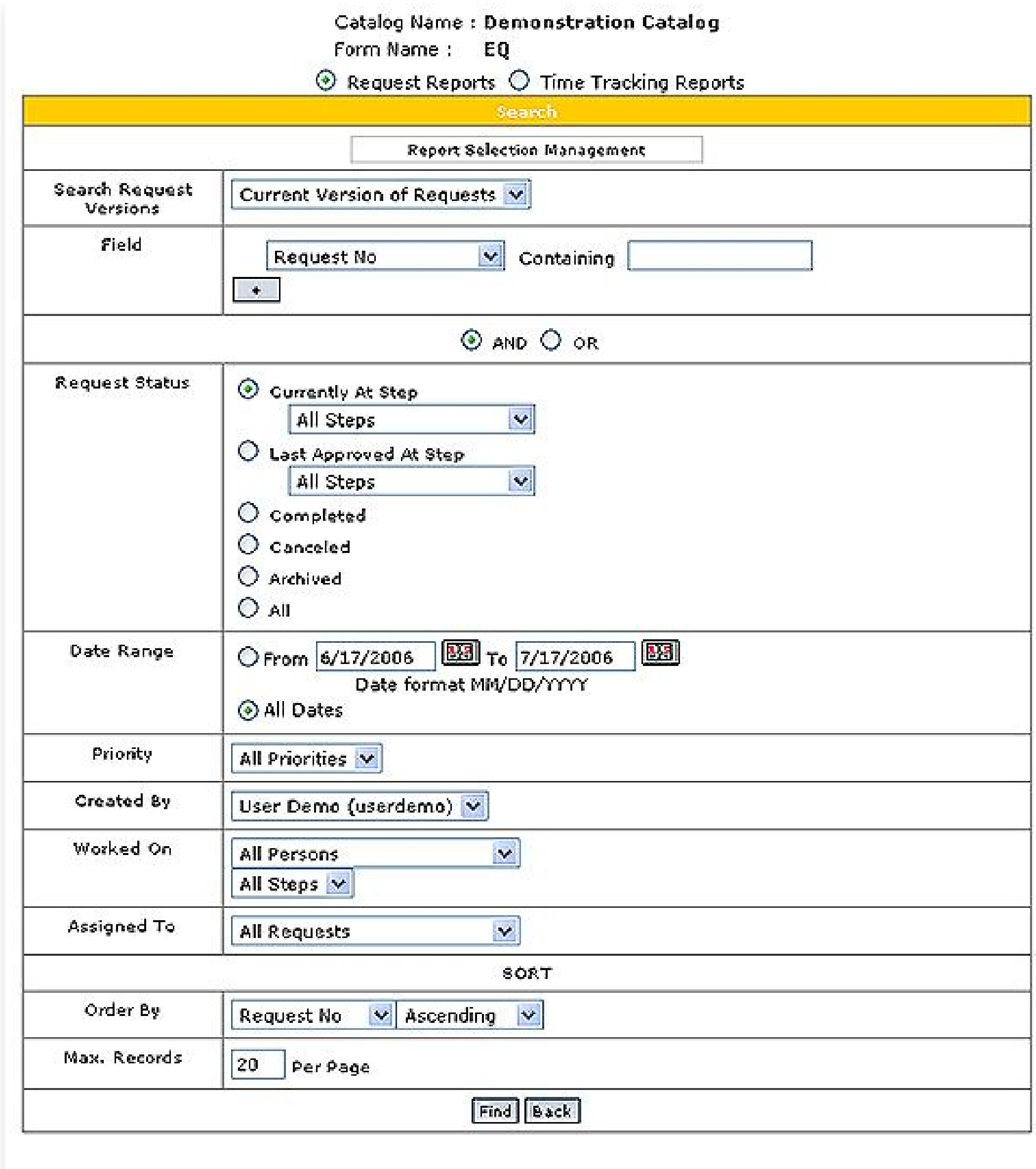
If you clicked on the Catalog name, you will see a screen similar to the one shown in Figure 4.3. It lists the names of the Forms in the Service Catalog with a check box next to each one. Click the check box for all Forms that you want to include in your queries and reports. Click the Browse Requests button.

Figure 4.3 - Reporting on Multiple Forms within a Catalog



Whether you are reporting on a single Form or browsing multiple Forms within a Service Catalog, the next screen that you will see is the Report Selection Screen. Figure 4.4 shows the Report Selection Screen. You will notice a radio button immediately above the yellow bar containing the word Search. Use this radio button to switch between Request reporting and Time Tracking reporting. All selections on this screen work identically for both modes.

Figure 4.4 - Report Selection Screen



The screen starts with the name of the Catalog and Form(s) that you are querying. Two sections follow, the Search section and the selected Request list.

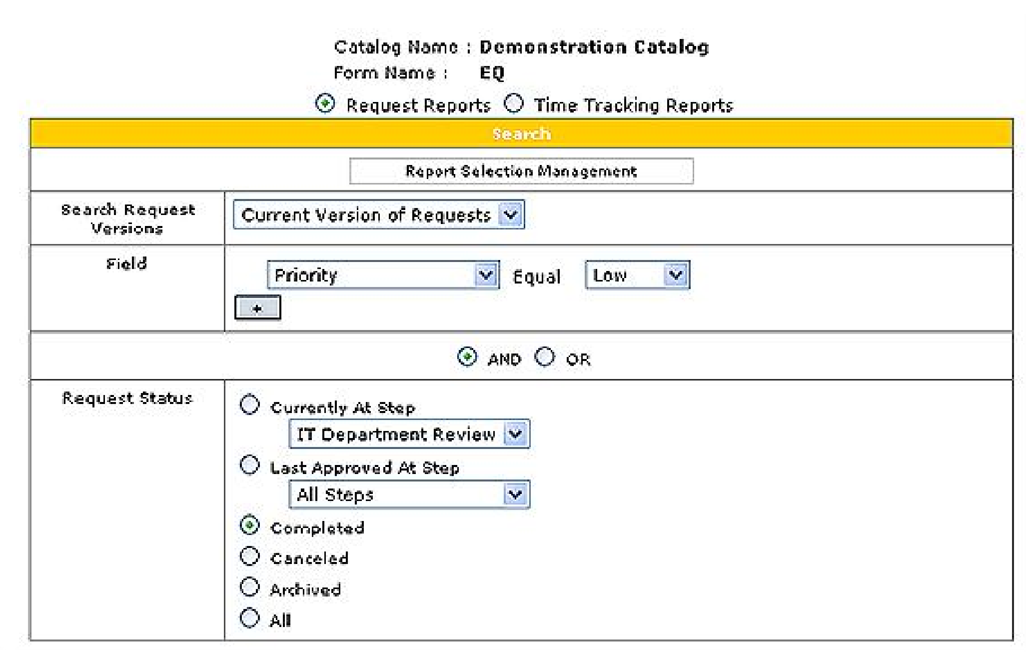
Search :

There are two parts to searches:

Search by content of a combination of Form fields - Available only if reporting for one Form.
Search by attributes of Requests

These searches are then combined by either And or Or. If you select And, then any content searches are applied along with Request attribute searches. For example, you could search for Requests of certain priority and only look in completed requests as shown below.

Figure 4.5 - Report Search Example

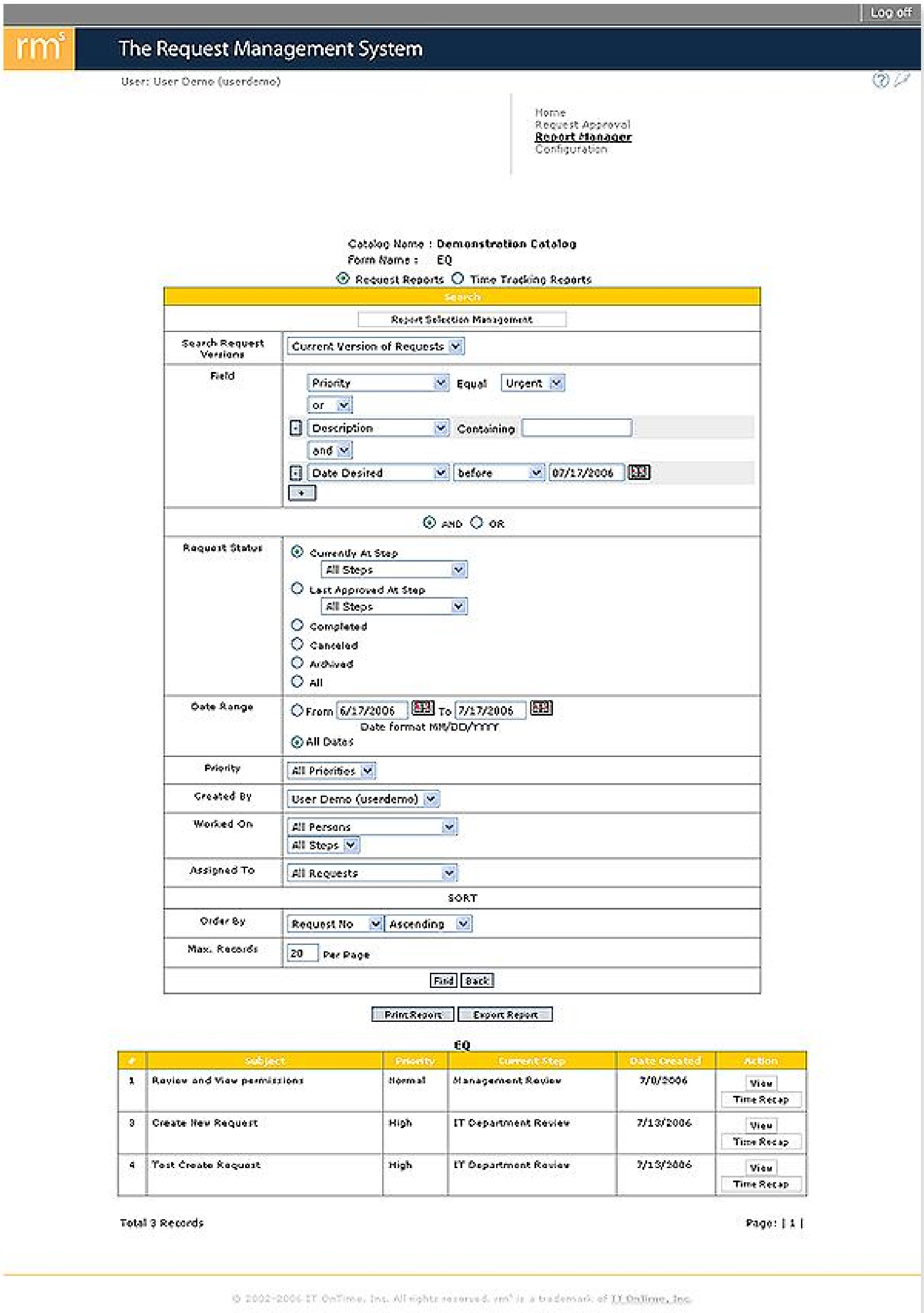


[Request Content Search](#)
[Request Attribute Search](#)
[Controlling Request Listing](#)

4.1.1 Request Content Search

Request Content Search allows you to search on one or more of the fields found in the Request Creation form. You can search on multiple values of a field by using OR between the fields or you can pinpoint your selection by using AND between the fields. You can also do both at the same time. The following is an example showing how to include multiple values from the same fields and also another field.

Figure 4.6 - Find Multiple Priorities On a Single Date



The mechanics are simple. There are 3 boxes for each criterion. The first box displays the fields that can be selected. The second box is the value to search on. It is separated from the field by one of the following terms:

Text Fields - Containing
Date Fields - A drop down box containing the values Before, On or Before, On, On or After, After.
Number Fields - A drop down box containing the values Less Than, Less Than or Equal, Equal, Greater Than or Equal or Greater Than.
Radio Buttons, Pick Lists, Check Boxes - Equal

For Text, Date and Number fields, you enter the value for the search in text box after the the search criterion. For Radio Buttons, Pick Lists and Check Boxes, a drop down list will contain all the possible values.

The third box in the group is a drop down containing the logical values AND and OR. When AND is selected, a Request is included if it contains the value along with any other specified values. When OR is selected, a Request is included if it contains the value specified without regard to other search criteria.

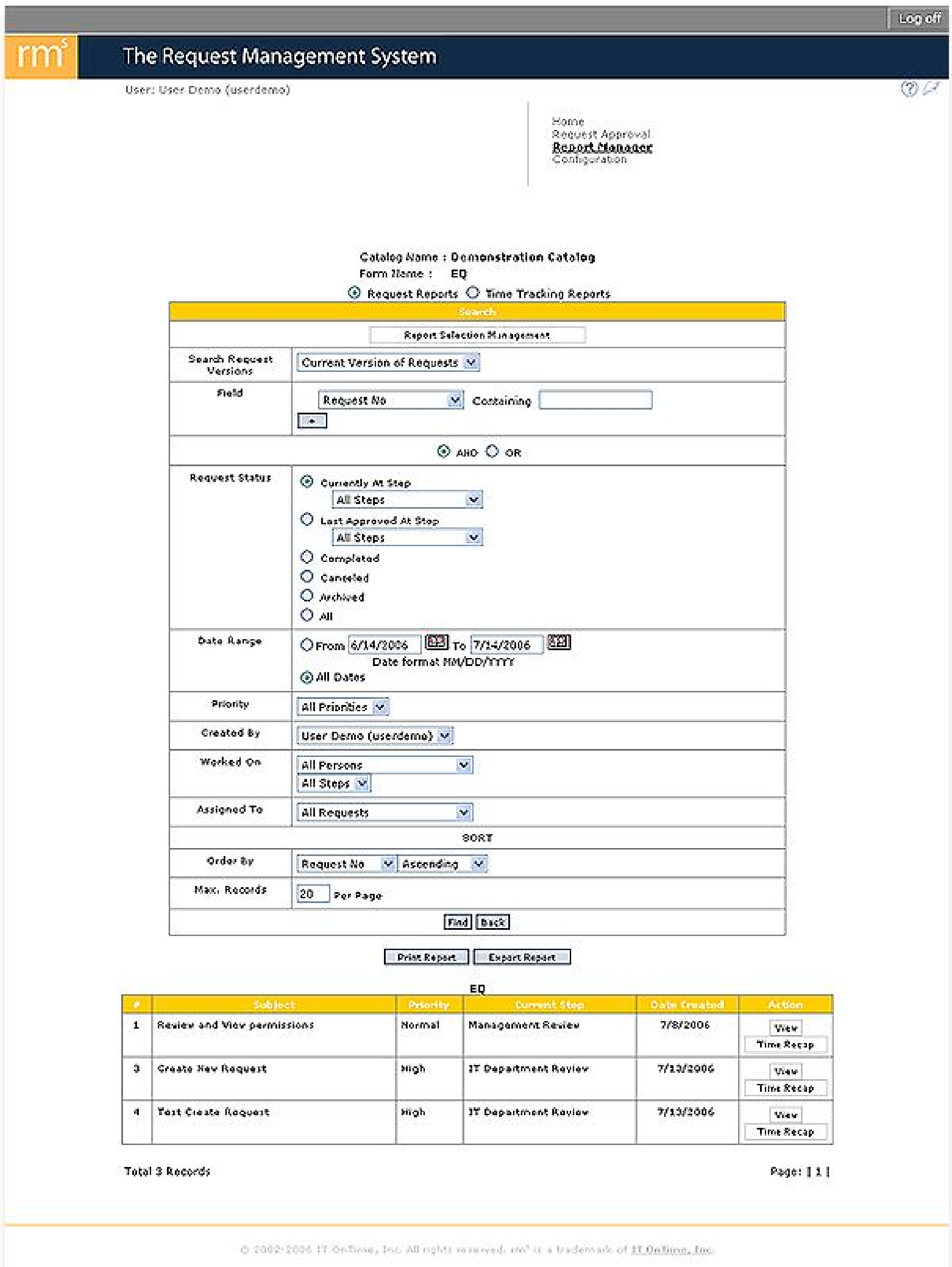
Values are applied to searches in the order specified. To control the search order, change the specification order.

The mechanics are simple. To add a search criterion, click the plus (+) button. To remove a search criterion, click the minus (-) button.

The next figure shows how to find Request No. 2 in the RMS for RMS Catalog, Form RMS Features. Starting at the top, see the explanation for the numbered sections.

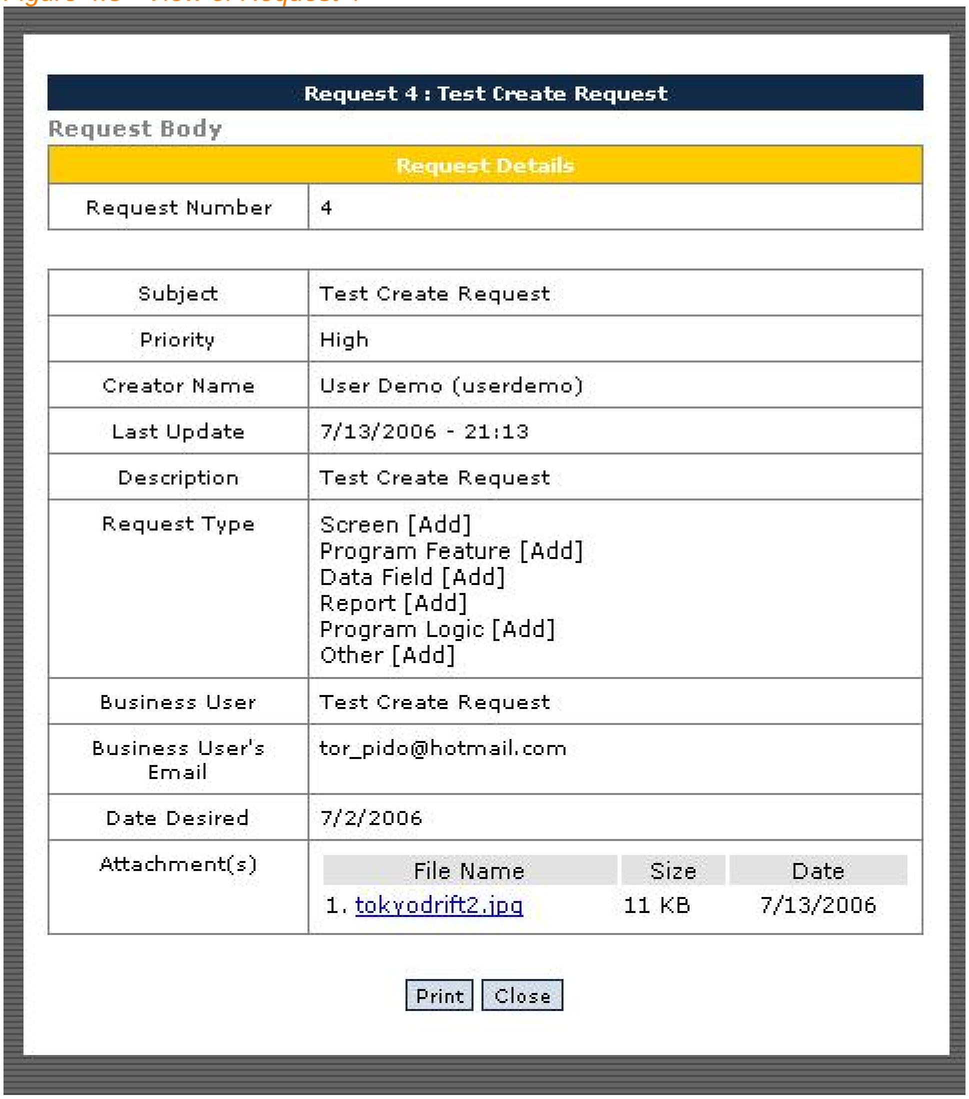
1. Report Mode - There are 2 mode, Requests and Time Tracking. Time Tracking is discussed in the section Tracking Time Worked. Select modes by clicking the radio button.
2. Report Selection Management - Clicking on this button allows you to save your selection criteria. See the section Saving Report Specifications.
3. Search Request Version - Administrators can edit Requests on behalf of users if the users requirements change or the Request is incorrect. rm^s maintains a history of Requests from their original creation through any edits. This section controls which Request versions are searched. Selections are: Current Version (as shown), Original Version of the Request (The information entered by the Request Owner while creating the Request, All Versions of Requests. Most of the time, you will search on the default, Current Version.
4. Request Content Search area previously described.
5. AND/OR Radio buttons that control whether you use Request Attribute Search to further limit the Request Content Search (AND) or use Request Attribute Search to find additional qualifying Requests (OR). This example uses AND because we are using the set of all Requests and then limiting by specifying Request Number Containing 2.

Figure 4.7 - Selecting a Request by Request Number



In above figure, you will see selected Request(s) summarized at the bottom. The first column is the Request ID. The second column is the subject of the Request. The third column is the Request priority. The fourth column is the current step and the fifth column is the creation date for the Request. The last column contains two buttons. Clicking on the View button will open the Request in read-only mode detailing all steps completed to date. The following figure shows Request 4, after clicking the View button.

Figure 4.8 - View of Request 4


Request 4 : Test Create Request

Request Body

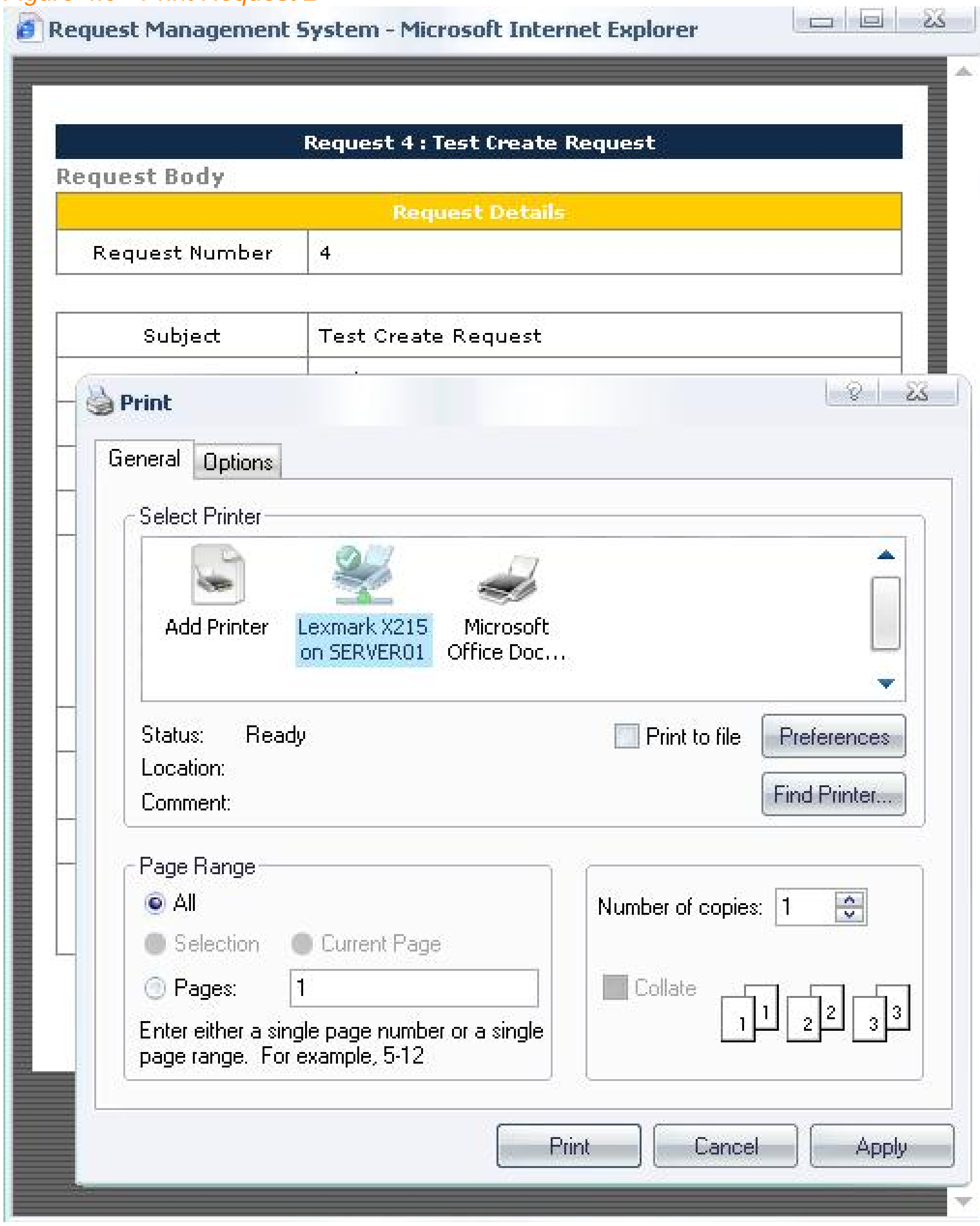
Request Details	
Request Number	4

Subject	Test Create Request
Priority	High
Creator Name	User Demo (userdemo)
Last Update	7/13/2006 - 21:13
Description	Test Create Request
Request Type	Screen [Add] Program Feature [Add] Data Field [Add] Report [Add] Program Logic [Add] Other [Add]
Business User	Test Create Request
Business User's Email	tor_pido@hotmail.com
Date Desired	7/2/2006
Attachment(s)	File Name / Size / Date 1. tokyodrift2.jpg / 11 KB / 7/13/2006

Print Close

This format is like the format for presenting Requests in the Request Manager described in the previous chapter. Omitted is Your Review since this is a read-only view of the Request and you cannot take any action on it. Instead, there is a Print button at the bottom of the screen. If you wish to print the Request, click the print button. rm^s will open a Print window displaying the Request and then open the Windows printer selection screen. The following figure shows this for a Microsoft Windows XP Professional system.

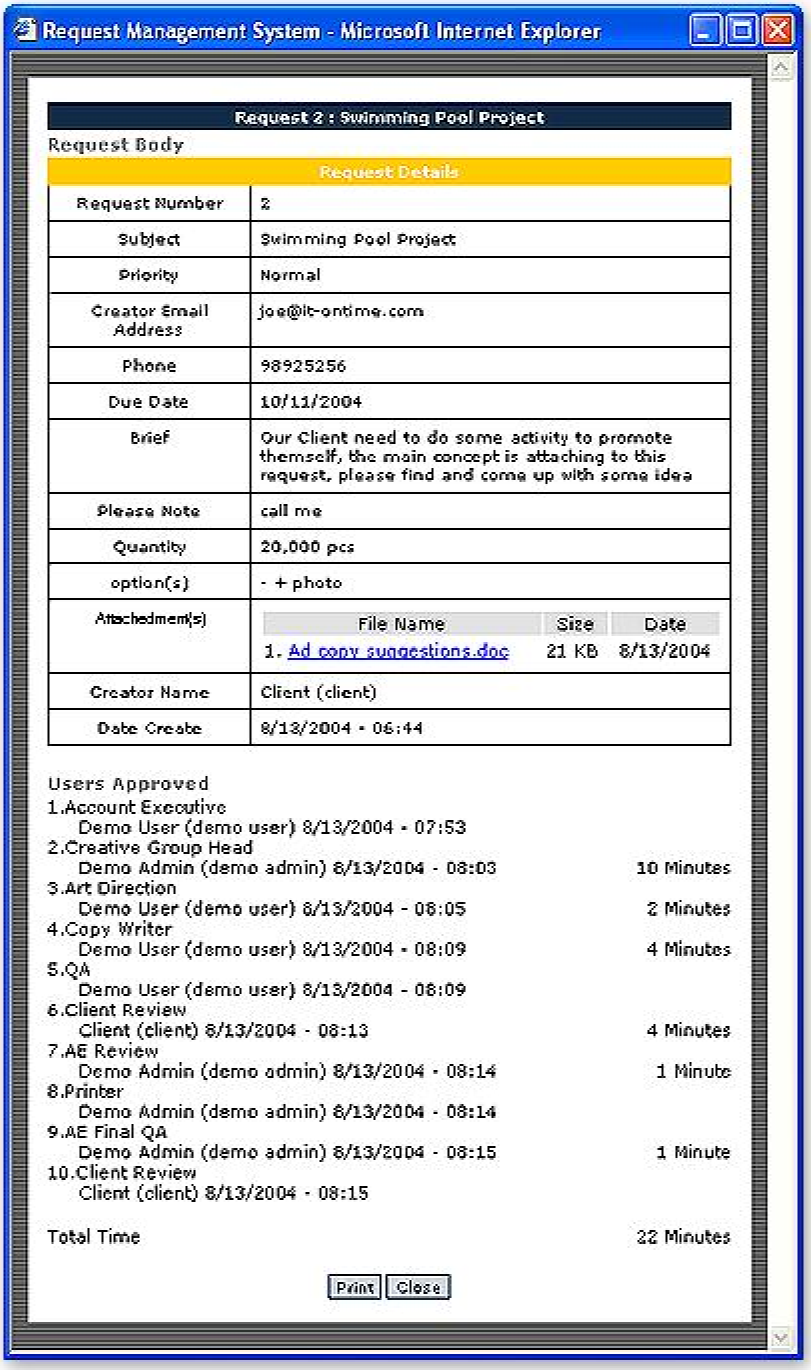
Figure 4.9 - Print Request 2



The printer details on your computer will be different. Select your usual printer and then click Print. The Request will now print. Once you have done this, close the display window that remains by clicking on the X on the top right corner of the window or by clicking the Close button.

If you click the Time Recap button, rm^s will display the elapsed time for each step completed. The following figure shows the Time Recap for Request 2.

Figure 4.10 - Request 2 Time Recap


Request Management System - Microsoft Internet Explorer

Request 2 : Swimming Pool Project

Request Body

Request Details	
Request Number	2
Subject	Swimming Pool Project
Priority	Normal
Creator Email Address	joe@it-ontime.com
Phone	98925256
Due Date	10/11/2004
Brief	Our Client need to do some activity to promote themself, the main concept is attaching to this request, please find and come up with some idea
Please Note	call me
Quantity	20,000 pcs
option(s)	- + photo
Attachedment(s)	File Name / Size / Date: 1. Ad copy suggestions.doc 21 KB 8/13/2004
Creator Name	Client (client)
Date Create	8/13/2004 - 06:44

Users Approved

1.Account Executive
Demo User (demo user) 8/13/2004 - 07:53

2.Creative Group Head
Demo Admin (demo admin) 8/13/2004 - 08:03 10 Minutes

3.Art Direction
Demo User (demo user) 8/13/2004 - 08:05 2 Minutes

4.Copy Writer
Demo User (demo user) 8/13/2004 - 08:09 4 Minutes

5.QA
Demo User (demo user) 8/13/2004 - 08:09

6.Client Review
Client (client) 8/13/2004 - 08:13 4 Minutes

7.AE Review
Demo Admin (demo admin) 8/13/2004 - 08:14 1 Minute

8.Printer
Demo Admin (demo admin) 8/13/2004 - 08:14

9.AE Final QA
Demo Admin (demo admin) 8/13/2004 - 08:15 1 Minute

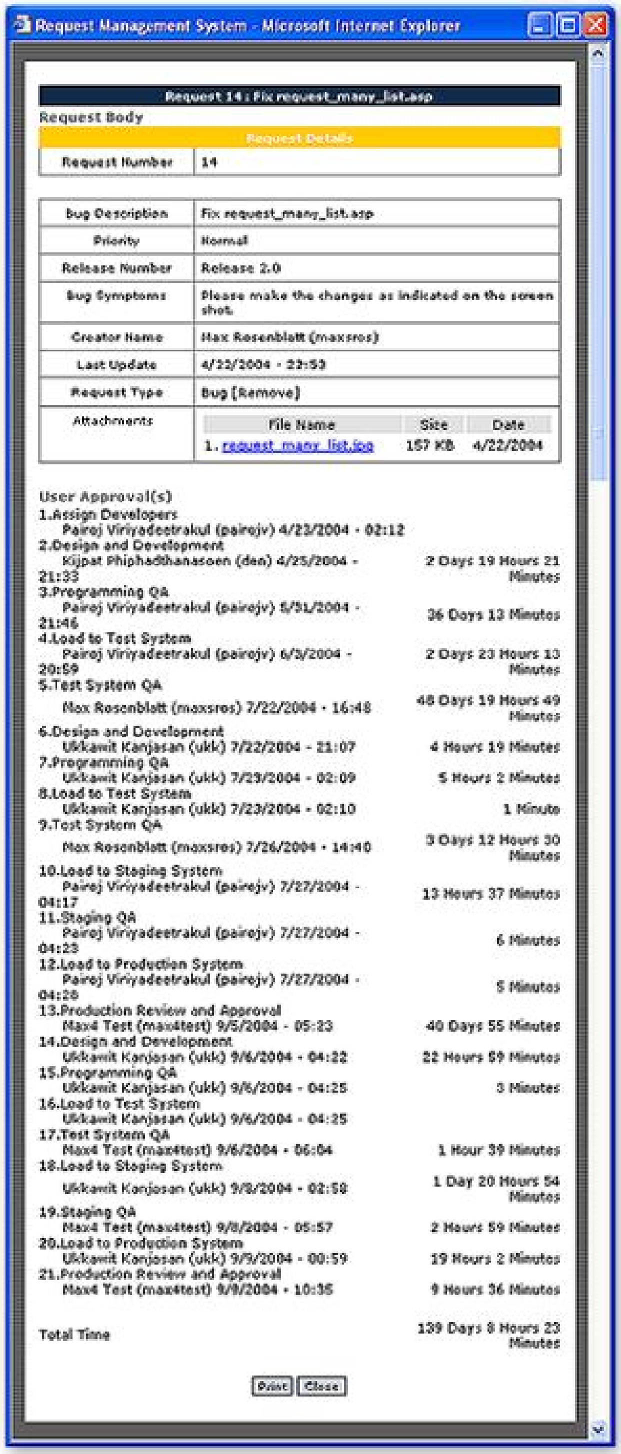
10.Client Review
Client (client) 8/13/2004 - 08:15

Total Time 22 Minutes

Print Close

The display shows each step in the order that it occurred along with the date and time of its completion. The display ends on the last completed step. The right most column lists the time taken at each step rounded up to the nearest minute. Note that the first or Create a Request Step is not shown as submitting the Request sets the starting time for all computations. The summary of the total time taken for all Steps appears after the last completed step. Below is a more interesting example from the rm^s Catalog for rm^s Development. Yes, we use rm^s internally for IT OnTime work.

Figure 4.11 - rm^s for rm^s Bugs Request 14



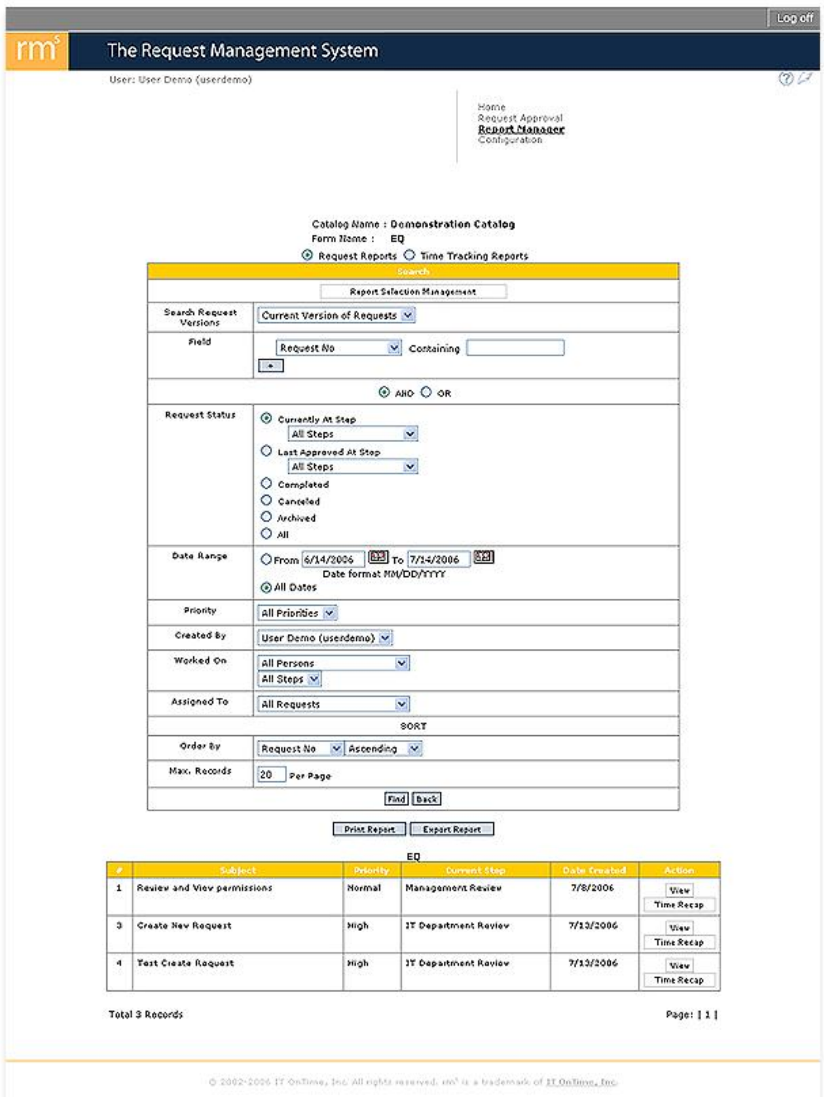
As you can see, the completion date for this Request is 9/9/2004.

You print Time Recaps in exactly the same way as Request Summaries.

4.1.2 Request Attribute Search

Request Attribute Search provides the ability to find Requests based on their attributes. rm^s allows searches on the following attributes:

Figure 4.12 - Advanced Search Attributes



The area below the AND/OR radio buttons is Request Attribute Search. You can see that it allows selection on 6 attributes. These are:

Status - The current status of the Request within the Workflow. The status are:

- **Currently at Step** - Show all of the User's active Requests. You can limit the Requests viewed by selecting a Step rather than All Steps.
- **Completed** - Show all the user's completed Requests.

- **Canceled** - Show all the user's canceled Requests.
- **Archived** - Show all the user's archived Requests.
- **All** - Show all the user's Requests.

Date Range - Shows all Requests between two dates or for the default of all dates. Selecting All Dates causes rm^s to ignore dates when searching for Requests. If a date range is specified, then the date applies to the Request's creation date for Requests in Process or All. For Completed Requests, it is the date it was completed. For Canceled Requests, it is the date the Request was canceled.

Dropdown List (Priority by Default) - To select only Requests of a particular category as presented in the Dropdown list, select that entry from the drop down list. The name of the field and its contents will differ from Service Catalog to Service Catalog. The list entries belong to the current Service Catalog.

Created By - If you want to find Requests created by a specific individual, choose that person from the dropdown list. This only applies to System, Catalog and Task Administrators as Users can only see their own Requests.

Worked On - This allows you to report on Request fulfilled by a specific person at a Step. Select a person from the top dropdown list. Select a Step from the second dropdown list. If All Persons is selected in the top list, the bottom list will only contain All Steps.

Assigned To - This allows you to report on Requests Assigned to a specific Person. Select a person from the dropdown list..

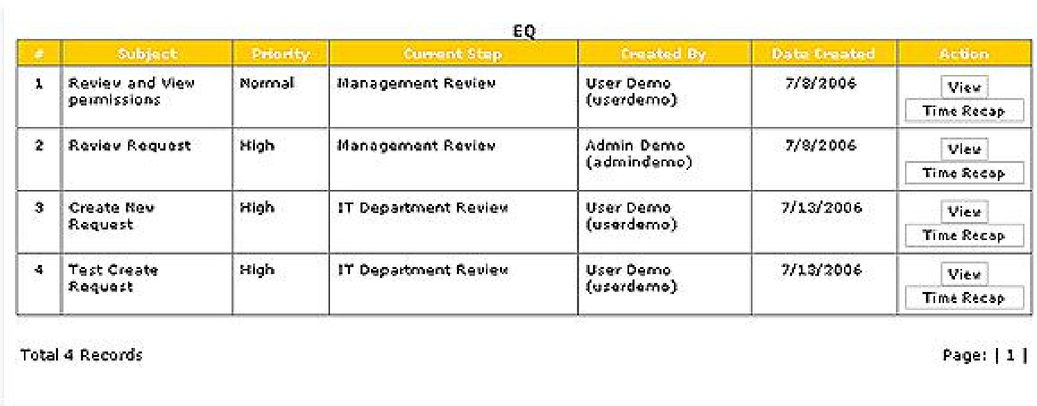
Once you have completed setting up your search, click the Find button. The list of Requests will now contain all Requests meeting your search criteria. When searching, rm^s uses all criteria combined, that is, rm^s "ands" all the criteria together.

The selected Request list shows the all Requests that meet the selection criteria. The View and Time Recap buttons function as described in the previous section.

4.1.3 Controlling Request Listing

The following figure shows the Requests selected in the previous section.

Figure 4.13 - Selected Requests



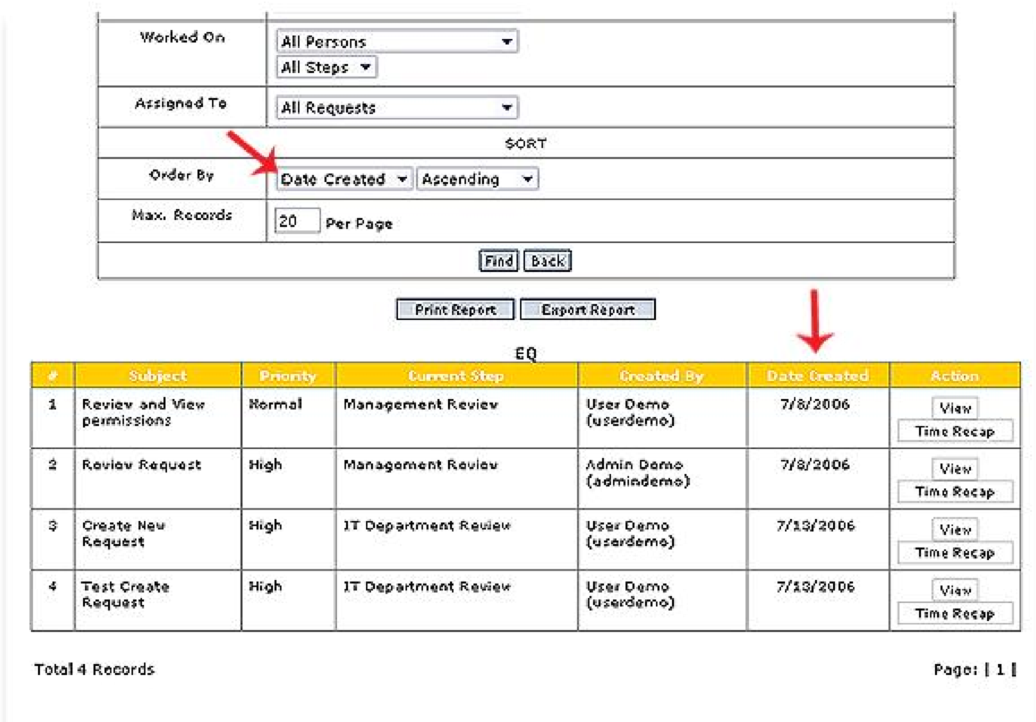
EQ

#	Subject	Priority	Current Step	Created By	Date Created	Action
1	Review and View permissions	Normal	Management Review	User Demo (userdemo)	7/8/2006	View Time Recap
2	Review Request	High	Management Review	Admin Demo (admindemo)	7/8/2006	View Time Recap
3	Create New Request	High	IT Department Review	User Demo (userdemo)	7/13/2006	View Time Recap
4	Test Create Request	High	IT Department Review	User Demo (userdemo)	7/13/2006	View Time Recap

Total 4 Records Page: | 1 |

After the Advanced Selections, there is an area labeled Sort. This controls the presentation of the listed Requests. In figure shown above, Requests are listed in the default order of sorted by Request number in ascending order. You have the ability to sort on Request No, the first field in all Requests (Subject if not renamed for your Form), the drop down list items, Current Step, Date Created, Created By. The next figure shows the same list of Requests sorted in descending order (newest first) by date.

Figure 4.14 - Selected Requests Sorted in Descending Order By Date



EQ

#	Subject	Priority	Current Step	Created By	Date Created	Action
1	Review and View permissions	Normal	Management Review	User Demo (userdemo)	7/8/2006	View Time Recap
2	Review Request	High	Management Review	Admin Demo (admindemo)	7/8/2006	View Time Recap
3	Create New Request	High	IT Department Review	User Demo (userdemo)	7/13/2006	View Time Recap
4	Test Create Request	High	IT Department Review	User Demo (userdemo)	7/13/2006	View Time Recap

Total 4 Records Page: | 1 |

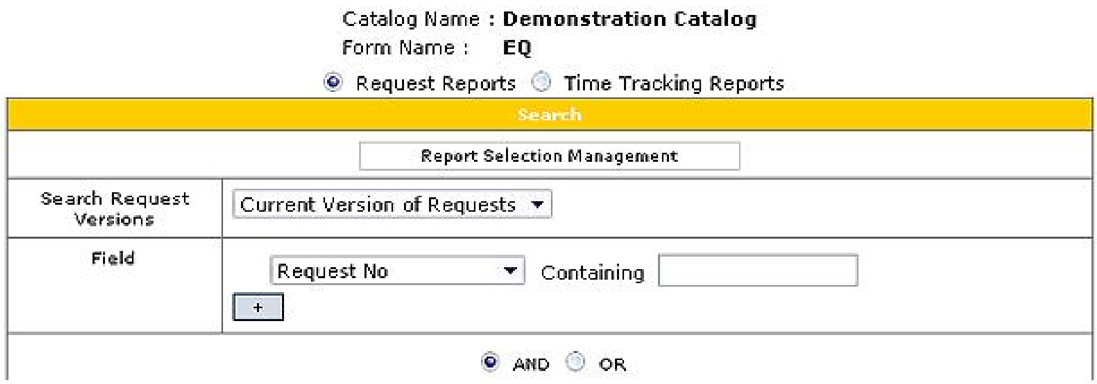
Directly below the Order by field, you will see a field labeled Max. Records. This controls the number of Requests displayed on a page. If you have a large number of Requests, this can be useful in reducing scrolling or reducing the number of pages you must view to see all of your Requests.

4.1.4 Saving Report Specifications

After constructing a Report specification, you may want to save it for later use. This allows you to run a report based on the same selection criteria again. However, the resulting report may not contain the same Requests because of work performed on outstanding Requests and the changes in Request Content and Attributes that result from additional approvals.

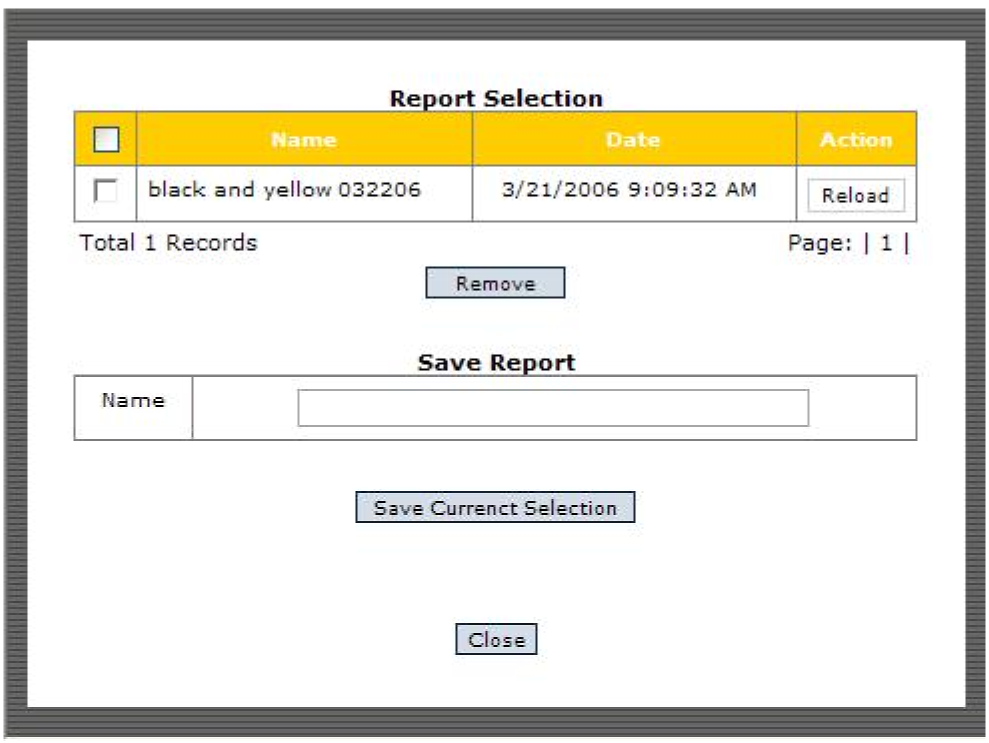
To save a Report specification, click the Report Selection Management button shown in the following figure.

Figure 4.15 - Report Selection Management



The following pop-up window will now open.

Figure 4.16 - Report Selection Window



The window has two sections: the upper table that contains the names of previously saved Report specifications and the lower input area for entering the name for saving the current specification.

To use a previously saved specification, click the Reload button in the Action column in the row of the specification you wish to use. To delete a saved specification, click the check box in the left column and then click the Remove button.

To save a Report specification, fill in the name for the save specification. Click the Save Current Selection button.

When you are done, click the Close button.

Always remember, you are not saving the Report output but the logical selection criteria for the reporting session at the point that you saved the selections. If you use the same specification on different days, the report contents may be different depending on Requests enter, Requests completed, Requests canceled and Requests approved.

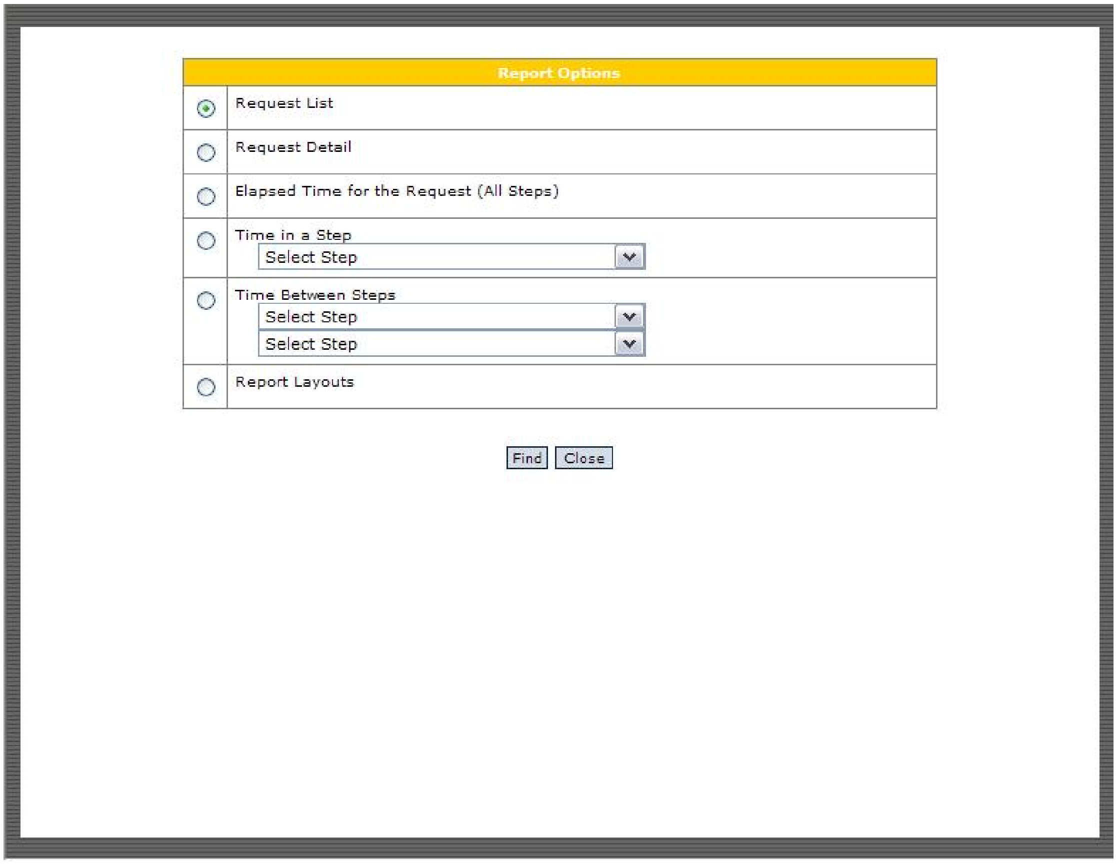
4.2 View and Printing Request Information

Once you have selected the Requests that wish to see, rm^s provides the ability to view and print Request Status reports. The figure below shows the Print button. The Print button will only appear after you have clicked the Find button to apply the current selection.

Figure 4.17 - Print Report Button

Clicking the Print Report button will open the following window.

Figure 4.18 - Report Options Screen



The screen lists the available report types are:

- Request List - A grid report of all Requests showing the same information as on the selection list. *Figure 4.20* shows the summary report.
- Request Detail - A report that prints out all steps for the selected Requests. Each Request begins on a new page.
- Elapsed Time for the Request (All Steps) - A report showing how long Requests have been in process or how long it took to move through the workflow from creation to completion or cancellation. *Figure 4.20* shows this report with the same Request selection.
- Time in a Step - How long Requests took in a particular step. *Figure 4.21* shows this report with the same Request selection.
- Time Between Steps - A report showing how long Requests took to move from the first specified step to the second specified step. Useful in identifying bottlenecks. *Figure 4.22* shows this report with the same Request selection.
- Report Layouts - A columnar report that allows the user to select Request Creation form fields for reporting, specify the order they are to appear in and specify sorting on a report column. The resulting report can be exported as a CSV file for use in other products such as Microsoft Excel or Access or a reporting tool such as Business Objects' Crystal Reports.

Clicking on the Find button will bring up the selected report. Clicking Print on this screen will open the Microsoft Windows Printer Selection dialogue box. *Figure 4.18* shows this for the Summary Report. The Printer Dialogue box is a standard operating system dialogue box and works the same as a similar screen for any other application you are using such as Microsoft Word. Select the printer from the selection of printers and click Print. The figures that follow show the report window after pressing Print or Cancel.

Figure 4.19 - Summary Report Printer Selection

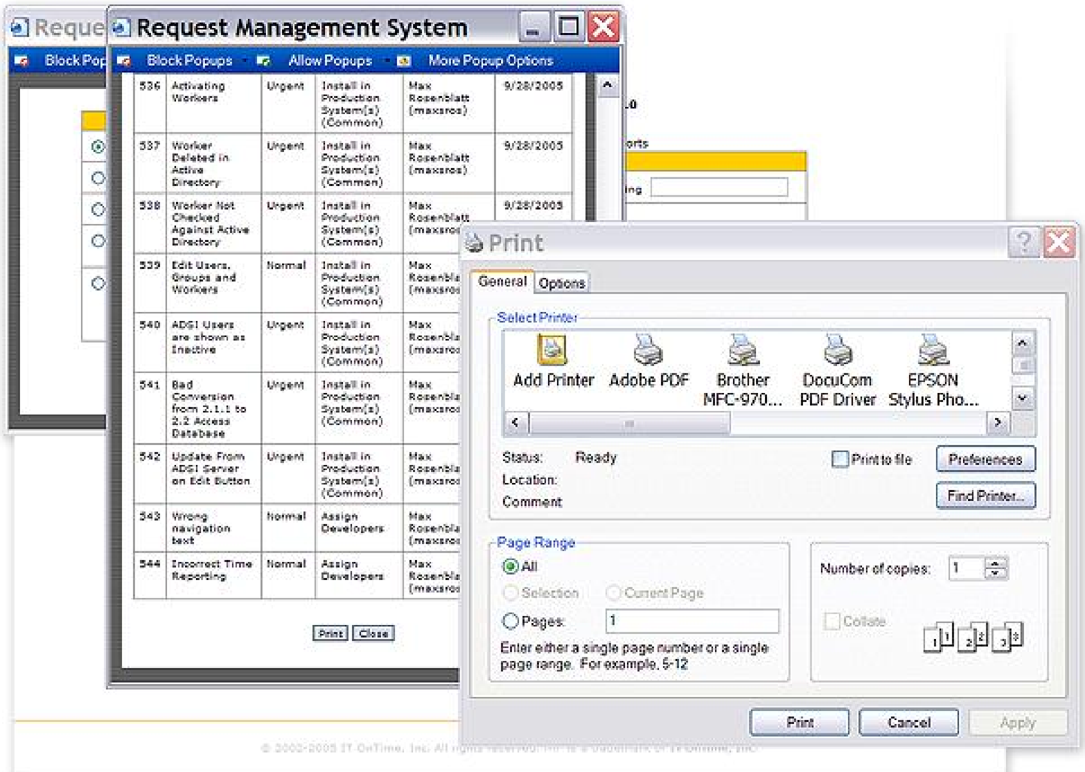


Figure 4.20 - Summary Report

RMS R2 Bugs

#	Bug Description	Priority	Current Step	Created By	Date Created
533	Catalog Manager Step Assignment Issues	Normal	Install in Production System(s) (Common)	Max Rosenblatt (maxsros)	9/28/2005
532	Cannot Write Error	Urgent	Install in Production System(s) (Common)	Max Rosenblatt (maxsros)	9/28/2005
531	rms Groups should be able to contain ADSI Users	Urgent	Install in Production System(s) (Common)	Max Rosenblatt (maxsros)	9/28/2005
529	Load from ADSI of Deleted User	Urgent	Install in Production System(s) (Common)	Max Rosenblatt (maxsros)	9/28/2005
526	Please fix template	Urgent	Install in Production System(s) (Common)	Max Rosenblatt (maxsros)	9/25/2005
525	Copyright Notice and Extra Lines in XML File	Urgent	Install in Production System(s) (Common)	Max Rosenblatt (maxsros)	9/24/2005
524	Worker into a User	Normal	Programming QA (Common)	Max Rosenblatt (maxsros)	9/23/2005
523	Export wrong data of last updated	Normal	Production Review and Approval	Wipaporn T. (puk)	9/20/2005

Print Close

The Summary Report shows the same information for selected Requests as shown in the Request list. If the report is longer than one page, multiple pages will print with headers, footers and page numbers. Close this window by clicking on the X at the top right of window or by clicking the Close button.

Figure 4.21 - Time in the Request (All Steps)

RMS R2 Bugs

No	Bug Description	Current Step	Created By	Time Used
533	Catalog Manager Step Assignment Issues	Install in Production System(s) (Common)	Max Rosenblatt (maxsros)	8 Days 13 Hours 33 Minutes
532	Cannot Write Error	Install in Production System(s) (Common)	Max Rosenblatt (maxsros)	8 Days 14 Hours 25 Minutes
531	rms Groups should be able to contain ADSI Users	Install in Production System(s) (Common)	Max Rosenblatt (maxsros)	8 Days 14 Hours 24 Minutes
529	Load from ADSI of Deleted User	Install in Production System(s) (Common)	Max Rosenblatt (maxsros)	8 Days 14 Hours 46 Minutes
526	Please fix template	Install in Production System(s) (Common)	Max Rosenblatt (maxsros)	19 Days 8 Minutes
525	Copyright Notice and Extra Lines in XML File	Install in Production System(s) (Common)	Max Rosenblatt (maxsros)	1 Day 15 Hours 23 Minutes
524	Worker into a User	Programming QA (Common)	Max Rosenblatt (maxsros)	9 Days 12 Hours 19 Minutes
523	Export wrong data of last updated	Production Review and Approval	Wipaporn T. (puk)	9 Days 17 Hours 4 Minutes

Print Close

This report identifies the Request in the first 2 columns. The current Step shows the current Step for the Request in the workflow. The time column shows how long the Request took to get to that Step.

Figure 4.22 - Time in the Step

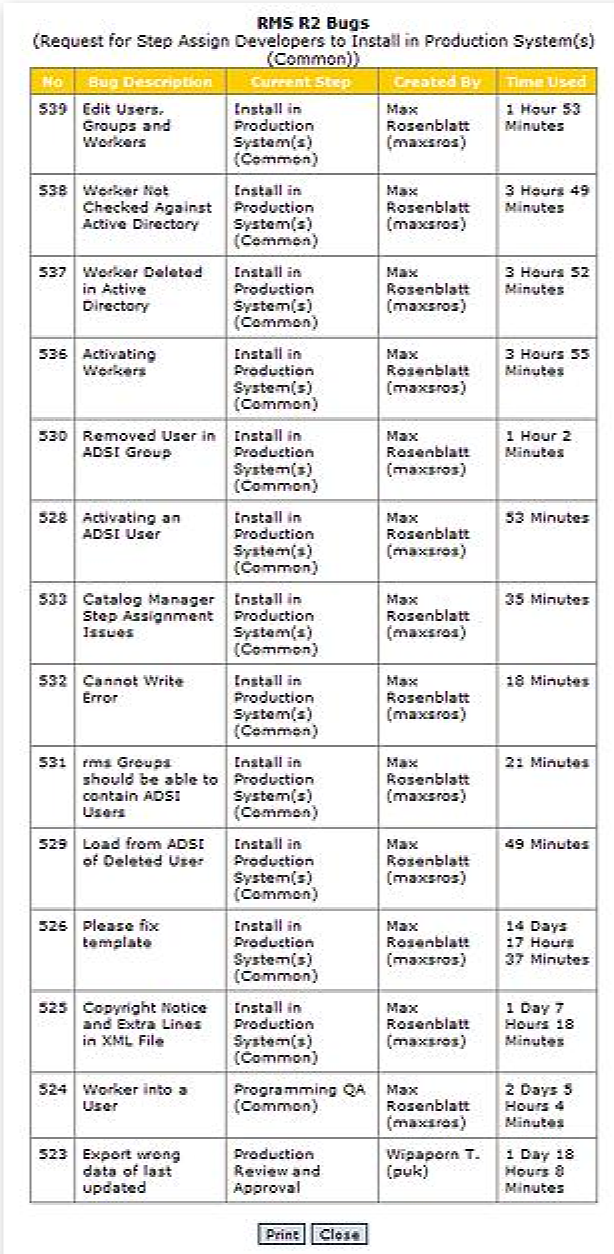
EQ
(Request for Step : IT Department Review)

No	Subject	Current Step	Created By	Time Used
1	Review and View permissions	Management Review	User Demo (userdemo)	11 Minutes
2	Review Request	Management Review	Admin Demo (admindemo)	0 Min
3	Create New Request	IT Department Review	User Demo (userdemo)	0 Min
4	Test Create Request	IT Department Review	User Demo (userdemo)	0 Min

Print Close

The format of this report is the same as the previous two reports. However, the time reported is the time that the Request spent at the selected Step.

Figure 4.23 - Time Between Steps



RMS R2 Bugs
(Request for Step Assign Developers to Install in Production System(s) (Common))

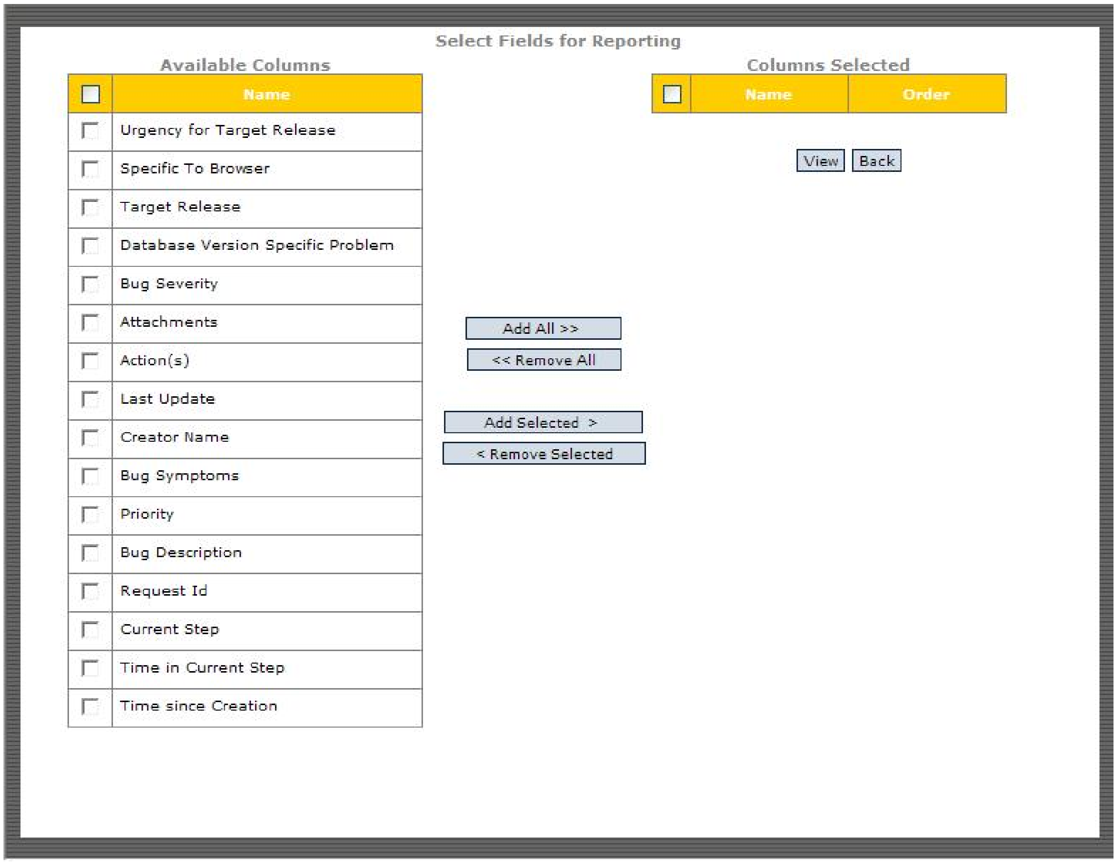
No	Bug Description	Current Step	Created By	Time Used
539	Edit Users, Groups and Workers	Install in Production System(s) (Common)	Max Rosenblatt (maxsros)	1 Hour 53 Minutes
538	Worker Not Checked Against Active Directory	Install in Production System(s) (Common)	Max Rosenblatt (maxsros)	3 Hours 49 Minutes
537	Worker Deleted in Active Directory	Install in Production System(s) (Common)	Max Rosenblatt (maxsros)	3 Hours 52 Minutes
536	Activating Workers	Install in Production System(s) (Common)	Max Rosenblatt (maxsros)	3 Hours 55 Minutes
530	Removed User in ADSI Group	Install in Production System(s) (Common)	Max Rosenblatt (maxsros)	1 Hour 2 Minutes
528	Activating an ADSI User	Install in Production System(s) (Common)	Max Rosenblatt (maxsros)	53 Minutes
533	Catalog Manager Step Assignment Issues	Install in Production System(s) (Common)	Max Rosenblatt (maxsros)	35 Minutes
532	Cannot Write Error	Install in Production System(s) (Common)	Max Rosenblatt (maxsros)	18 Minutes
531	rms Groups should be able to contain ADSI Users	Install in Production System(s) (Common)	Max Rosenblatt (maxsros)	21 Minutes
529	Load from ADSI of Deleted User	Install in Production System(s) (Common)	Max Rosenblatt (maxsros)	49 Minutes
526	Please fix template	Install in Production System(s) (Common)	Max Rosenblatt (maxsros)	14 Days 17 Hours 37 Minutes
525	Copyright Notice and Extra Lines in XML File	Install in Production System(s) (Common)	Max Rosenblatt (maxsros)	1 Day 7 Hours 18 Minutes
524	Worker into a User	Programming QA (Common)	Max Rosenblatt (maxsros)	2 Days 5 Hours 4 Minutes
523	Export wrong data of last updated	Production Review and Approval	Wipaporn T. (puk)	1 Day 18 Hours 8 Minutes

Print Close

The Time Between Two Steps report shows how long Requests took to move between two workflow Steps. Use the drop down lists to specify a start and end Step for reporting.

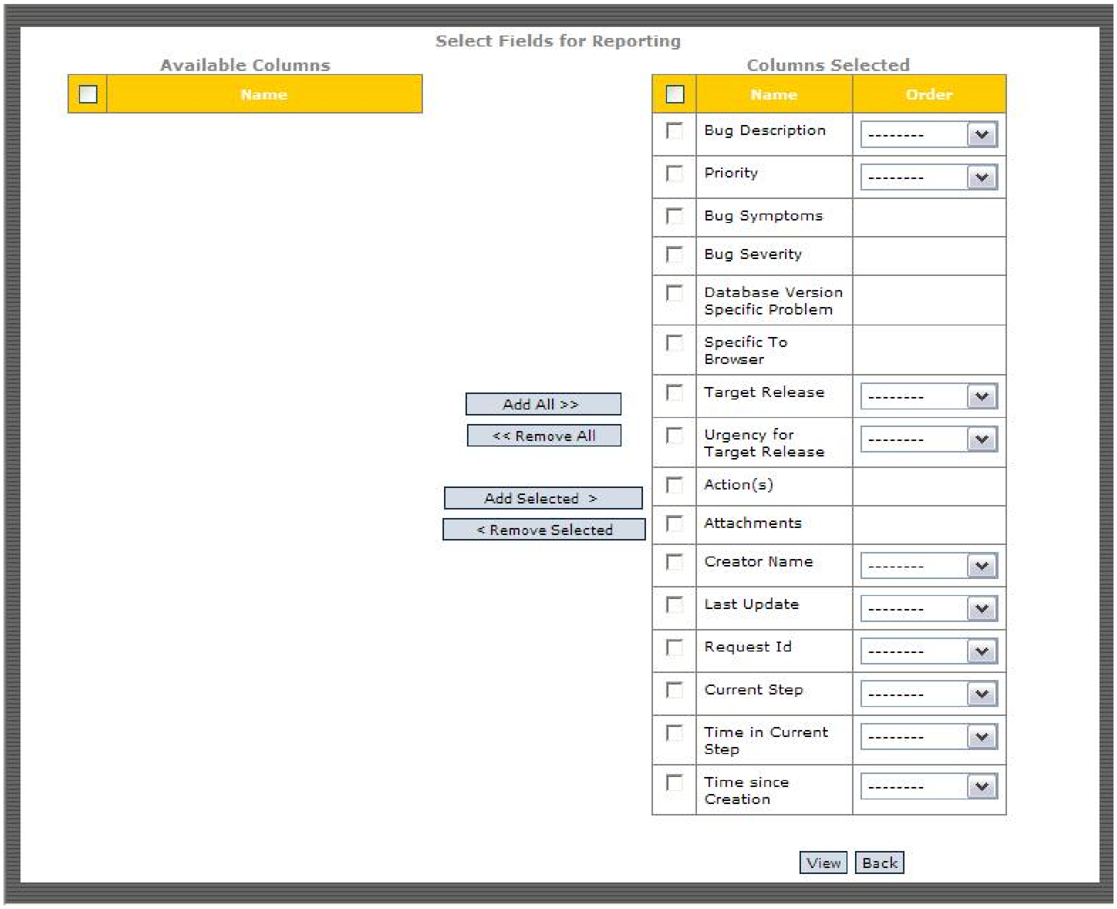
If you select Report Layout and then click Find, you will see a pop-up window similar to the one shown in the following figure. The list of available columns will be different because they the fields found on your Request Creation form.

Figure 4.24 - Report Layout Selection



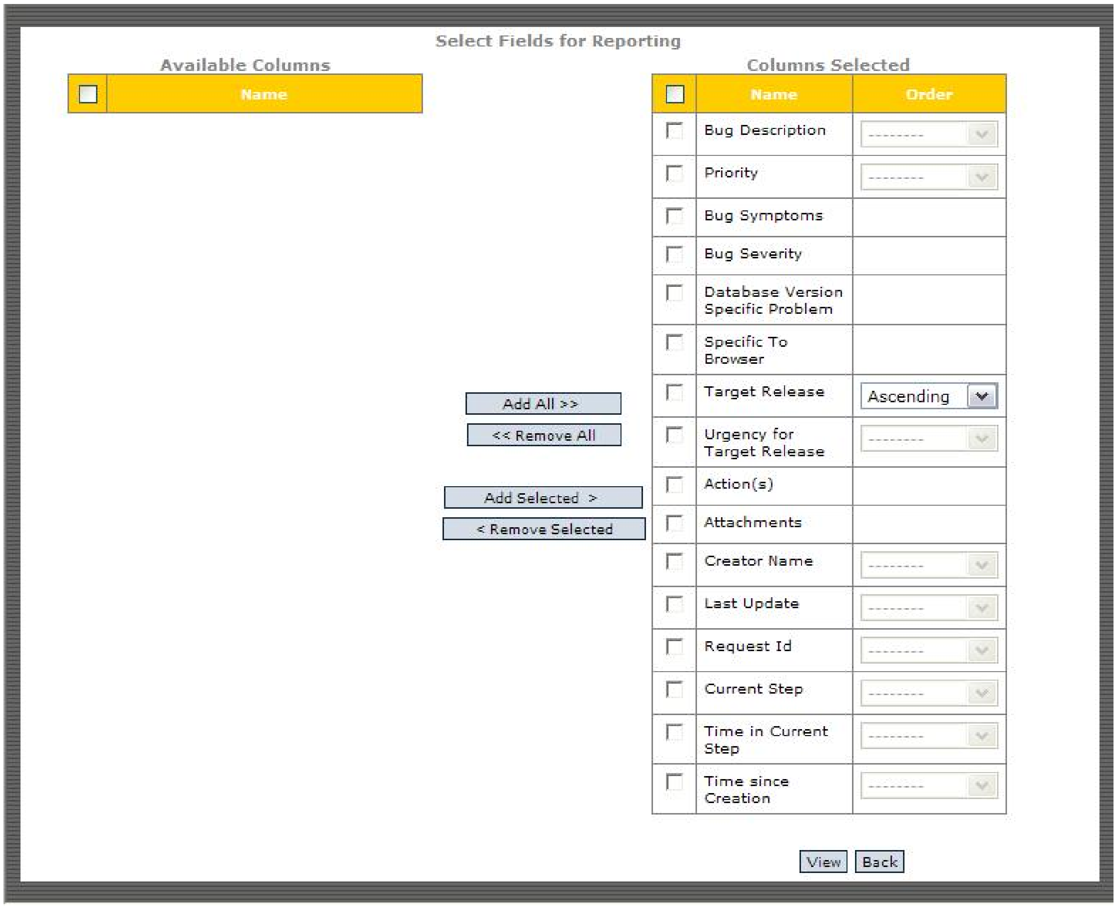
All fields in the Request Creation form are available for reporting. Three pieces of process information are available also. These are: Current Step, Time in Current Step and Time since Creation. To include all available fields in the report in the order shown in the left hand column, click the Add All button. The following figure shows the effect.

Figure 4.25 - Report Layout Add All Fields



You can see that all fields now appear in the right hand column in the same order. To the right of the field names is another column labeled Order. You can sort the report on one column by clicking the drop down next to the field and selecting Ascending or Descending. The following figure shows the effect of doing this.

Figure 4.26 - After Selecting Sort Order

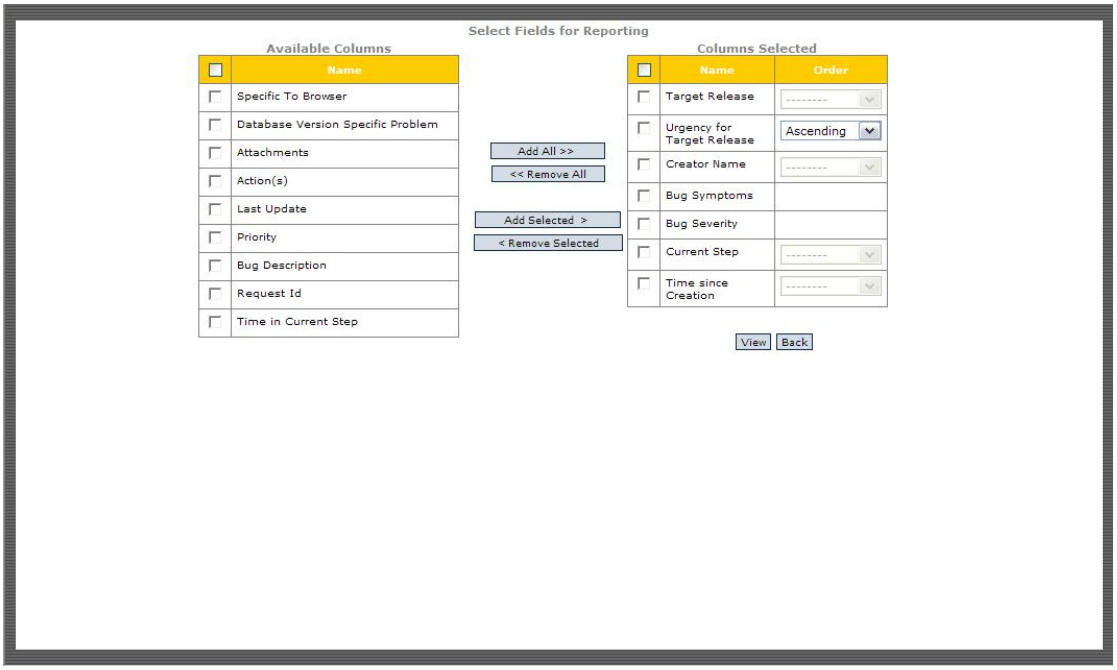


The screen will now gray out all the drop down boxes except for the one selected. To select another column to sort the report on, select hashed line (---------) from the list. You will now see the screen return to the state shown in the previous figure.

This screen remembers the last settings for each Form. If you want to return to the original state, click the Remove All button. The Columns Select list will now be empty.

If you want to include fields in a specific order, use the check box next to the field name in the Available Columns list. Click the Add Selected button. Each time you do this, the column will be added to the end of the list. See the next figure for an example.

Figure 4.27 - Adding Columns in a Specific Order



To see the report previous on screen, click the View button. The following figure contains the report preview for the above report.

Figure 4.28 - Report Preview

RMS Bugs

Target Release	Urgency for Target Release	Creator Name	Bug Symptoms	Bug Severity	Current Step	Time since Creation
Release 2.3	High	Max Rosenblatt (maxsros)	I downloaded the most recent ebizrequest and installed it on my Windows 2000 server. No user list ever shows up for Change User Login to However, if I run the same code on my Windows XP laptop, the Change User Login to list is populated.	Losing or Corrupting Data - Fix Immediately	Development (Common)	52:09:06
Release 2.3	High	Max Rosenblatt (maxsros)	If you click the Time Recap button on the Report Manager screen, the reports look wrong. See details.	Wrong Answer - Fix Immediately	Install in Test System (Common)	45:03:29
Release 2.3	High	Max Rosenblatt (maxsros)	I think this error is an ADSI connection problem. Took a database with defined ADSI users but the installation did not have ADSI connection information. Went to edit an ADSI user. Got the attached script error.	Crash or Script Error - Fix Immediately	Production Review and Approval	21:02:44
Release 2.3	High	Max Rosenblatt (maxsros)	Right now, Users and User Administrators only see requests that they created. Based on customer feedback, we should change this to allow Users and User Administrators to see Requests they Created and Requests they worked on.	Improperly Trapped Condition	Install in Test System (Common)	19:22:05
Release 2.3	High	Max Rosenblatt (maxsros)	I cannot reconnect to rms instances where I used SQL Server authentication. I am not sure of the combination of circumstances except that the SQLServer and IIS Server are on the same machine and it is a server and not the local machine. It always works the first time but at some point after, you get the attached error.	Crash or Script Error - Fix Immediately Losing or Corrupting Data - Fix Immediately	Install in Test System (Common)	19:21:51
Release 2.3	High	Max Rosenblatt (maxsros)	After I saved an update to an approval, each time that it comes back to me at the step indicated in the attachment, it all shows the information entered at that update.	Display or Printing Problem - Major user impact.	Development (Common)	14:03:19
Release 2.3	Low	Max Rosenblatt (maxsros)	For an Assign User step, at least one selected user for Assignment must have Update rights. If no one with Update rights is selected, the message should be: At least one Assigned User must have rights to Update the Request at the next Step.	Improperly Trapped Condition	Test System User Review (Common)	69:16:17
Release 2.3	Low	Max Rosenblatt (maxsros)	The database upgrade screen does not offer any buttons in Firefox	Display or Printing Problem - Major user impact.	Production Review and Approval	12:02:28
Release 2.3	Low	Max Rosenblatt (maxsros)	When I go to do a print Request Detail in Firefox, nothing shows in the report window. Everything works fine in the other 3 browsers. This is in ebizrequest.com	Display or Printing Problem - Major user impact.	Install in Test System (Common)	06:09:47
Release 2.3	Low	Max Rosenblatt (maxsros)	The Creator Name field for a Request should show <editor name> for <owner name> after the Request as edited. This change is similar to the logged in user change. If this will cause a delay, let me know. No one except me has noticed it to date.	Display or Printing Problem - Major user impact.	Development (Common)	05:22:18
Release 2.3	Low	Max Rosenblatt (maxsros)	Is there any way to use rmsadmin as the sender for reminder emails?	Display incorrect but little user impact. Display Can Cause User Confusion	Development (Common)	01:10:26
Release 2.3	Moderate	Max Rosenblatt (maxsros)	When a request is returned to step where there were assigned users the previous time it was approved at that step, then it should be return only to those assigned users and not to all users at that step. For example: In rms for rms programming common, we have Development as an assigned user step. When something is returned to there, then it should be returned to the users that were last assigned to that step. Right now, it returns it to all users.	Improperly Trapped Condition	Development (Common)	61:07:46
Release 2.3	Moderate	Max Rosenblatt (maxsros)	I can assign old ADSI users that are deleted from the Active Directory without getting a message that they no longer exist.	Improperly Trapped Condition	Development (Common)	13:22:03
Release 2.3	Moderate	Max Rosenblatt (maxsros)	If you set a reminder for a step and then remove the setting from the workflow, requests approved while there was a reminder continue to send reminder emails. Once the workflow setting is changed, rms should stop sending reminder emails. See attached email from www.ebizrequest.com/rms2/max's test catalog/form with branch.	Improperly Trapped Condition	Development (Common)	04:11:23
Release 2.3	Moderate	Max Rosenblatt (maxsros)	With the changes to Project Admins and Users, they now can edit System Admins data. Please remove the Edit button in Users for System Admins in the Project Admin view of Users.	Improperly Trapped Condition	Assign Developers	00:09:45

Print | Export CSV File | Close | Back

At the bottom of the report preview are four buttons. The Print button works identically to the previous description of print. Close, closes the window leaving the Report Layout column selection window. Back returns to the Report Specification Screen.

The Export CSV File creates a quoted, comma delimited file for use with other products. After clicking the Export CSV File button, you will see an operating system generated File Save dialogue box. The generated file is tested to work with a number of products. If the file contains long text fields with new lines, it will not import correctly using Microsoft Excel Data, Import External Data, Import because of a known problem with Microsoft Excel.

4.3 Viewing and Reporting Time Tracking Information

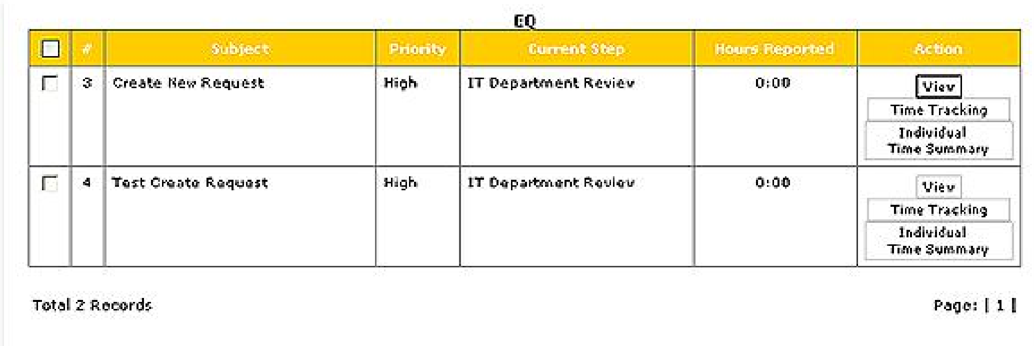
If you are using rm^{s} for tracking time worked on requests, you can report these times. To access Time Tracking information in the Report Manager, you will need to switch to Time Tracking mode. See the radio button in the next figure.

Figure 4.29 - Report Manager Mode

Click the radio button labeled Time Tracking Reports. All selection methods described in the previous section apply to Time Tracking Reports.

The next figure shows a set of selections in Time Tracking mode.

Figure 4.30 - Time Tracking Selections



EQ

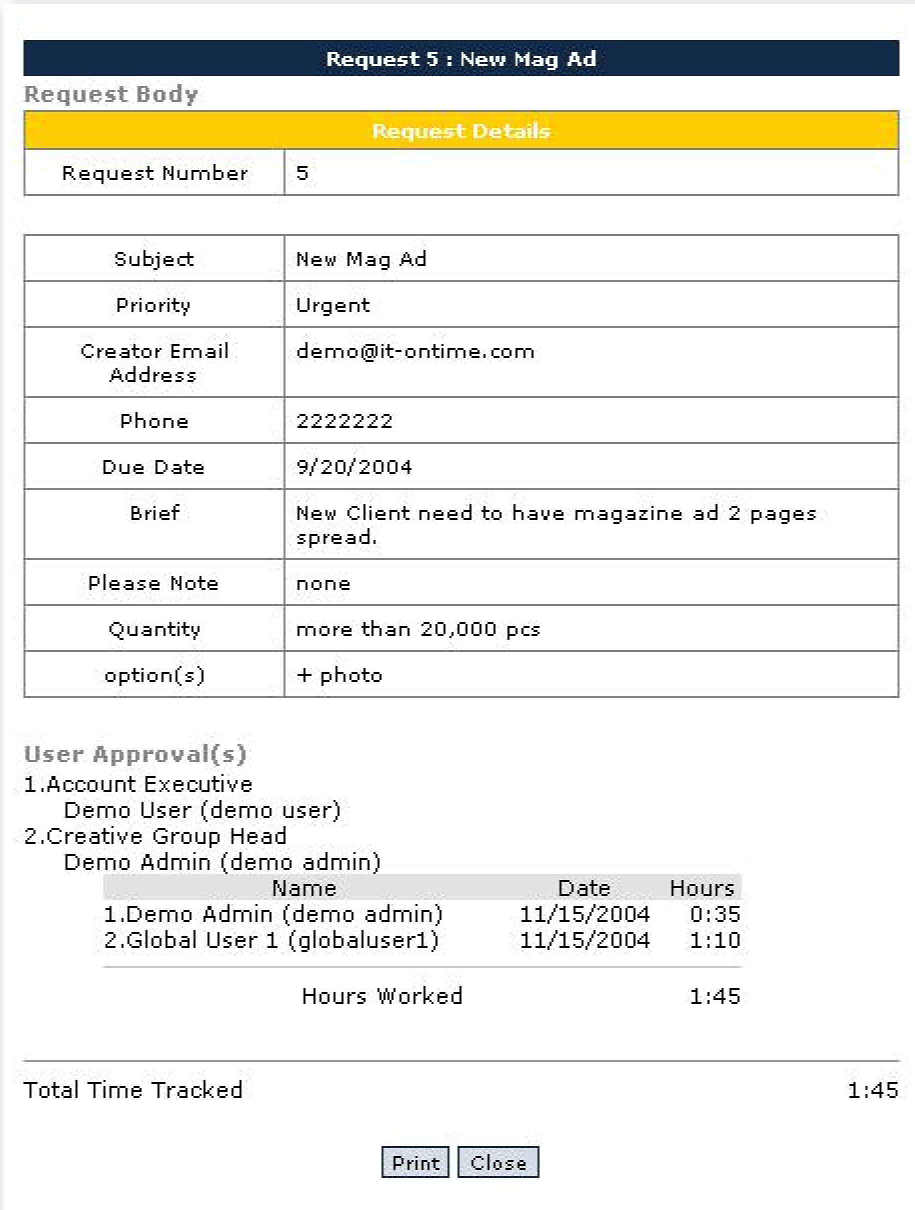
☐	#	Subject	Priority	Current Step	Hours Reported	Action
☐	3	Create New Request	High	IT Department Review	0:00	View Time Tracking Individual Time Summary
☐	4	Test Create Request	High	IT Department Review	0:00	View Time Tracking Individual Time Summary

Total 2 Records

Page: [1]

If you read the previous section, View and Printing Request Information, you will notice that the Request listing now has an additional column labeled Hours Reported. This is the sum of all hours reported for the Request within rm^s. You will also see that there are now three buttons for each Request in the Action column. View produces a simple listing of the Request that may be printed on any available printer. This is identical to View in the previous section. Click the Print button in the window showing the Request. The second button, Time Tracking, produces a listing of the Request that shows the Request definition and then Time Tracking information entered for each step by person working with a total for the Step and a grand total for the Request. Figure 4.23 shows an example of a Time Tracking display. To print this information, click the Print button at the end of the Request listing.

Figure 4.31 - Request Time Tracking Summary



Request 5 : New Mag Ad

Request Body

Request Details	
Request Number	5

Subject	New Mag Ad
Priority	Urgent
Creator Email Address	demo@it-ontime.com
Phone	2222222
Due Date	9/20/2004
Brief	New Client need to have magazine ad 2 pages spread.
Please Note	none
Quantity	more than 20,000 pcs
option(s)	+ photo

User Approval(s)

1.Account Executive
   Demo User (demo user)
2.Creative Group Head
   Demo Admin (demo admin)

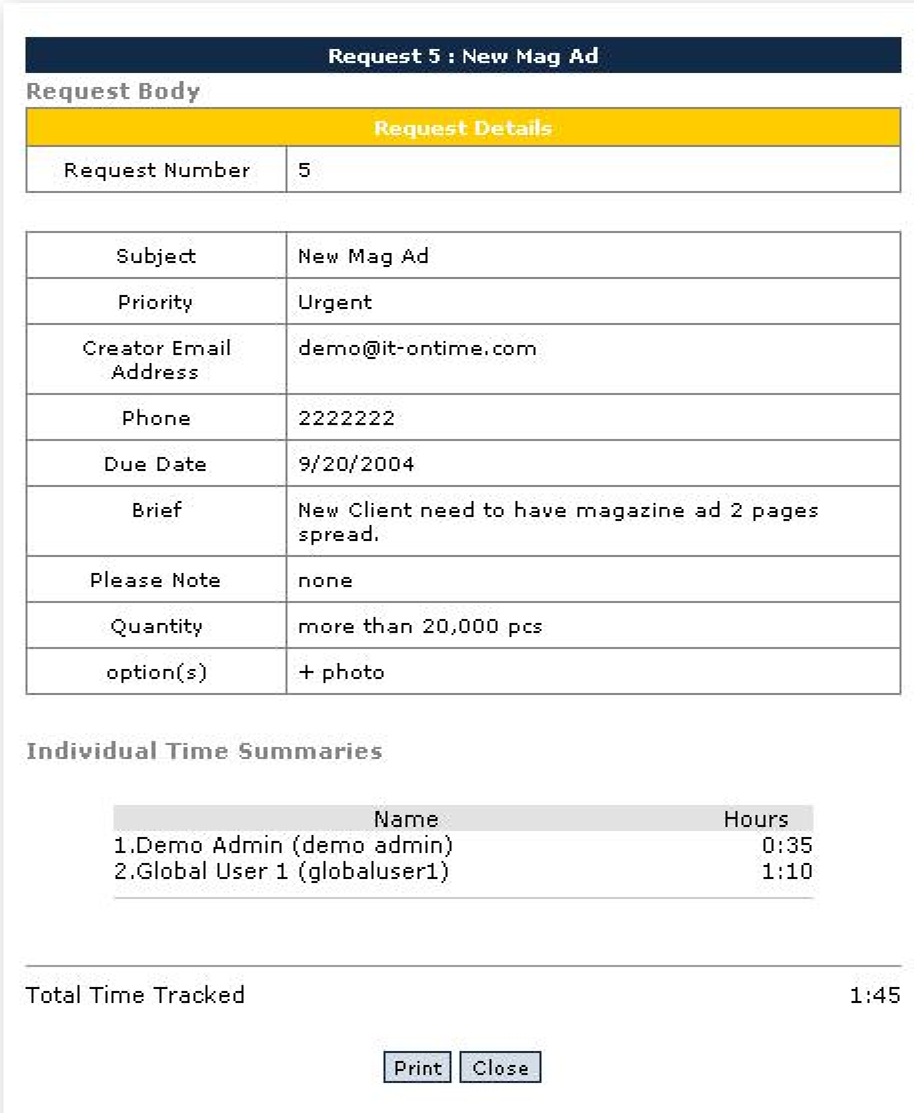
Name	Date	Hours
1.Demo Admin (demo admin)	11/15/2004	0:35
2.Global User 1 (globaluser1)	11/15/2004	1:10
Hours Worked		1:45

Total Time Tracked 1:45

Print Close

The third button, Individual Time Summary, produces a listing of the Request with all time reported summarized by person reporting time information. Print the information by clicking the Print button at the bottom of the window.

Figure 4.32 - Individual Time Summary

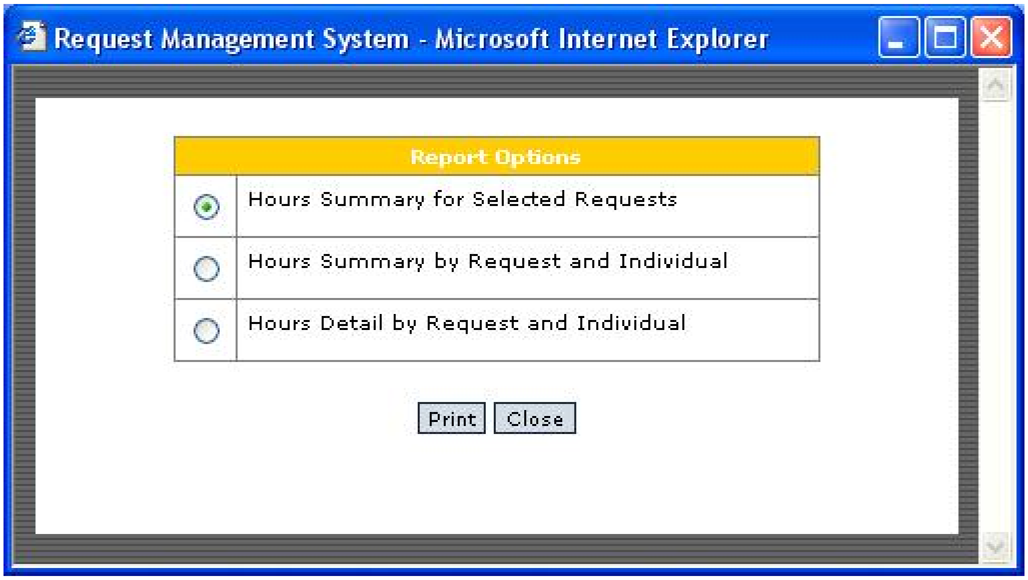


To produce reports across Requests, click the check box next to the Request Number for all Requests you wish to include in the reports. To select all Requests, click the check box in the header bar. Click the Hours Worked Summaries button located immediately below the selection section of the screen.

Figure 4.33 - Hours Work Summaries

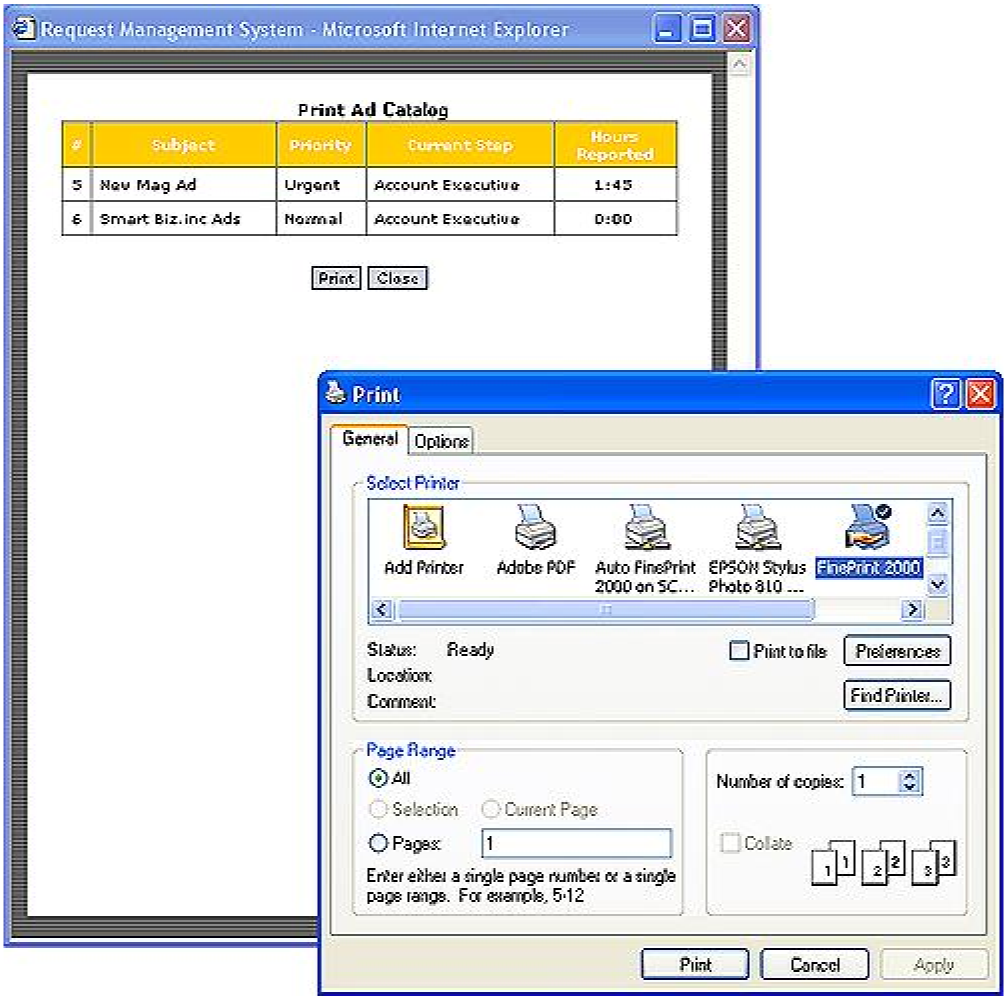
Once you have clicked this button, a new window will open with a list of available reports.

Figure 4.34 - Report Options



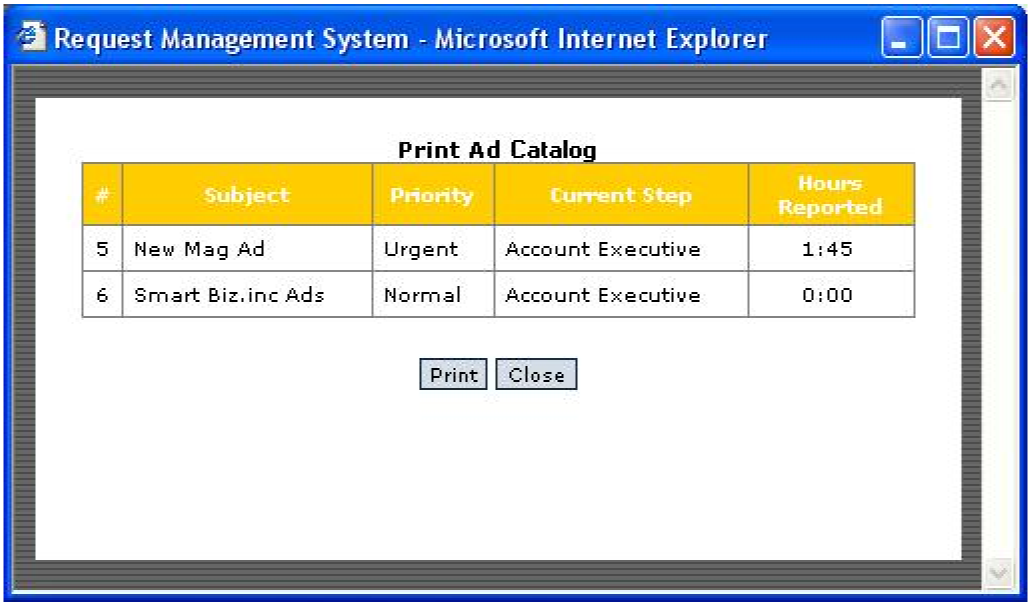
To print any of the reports, click the radio button next to the report name and then click the Print button. Two things will now happen. First, the contents of the window will change to the reports. Second, a standard Microsoft Windows printer selection dialogue box will open. To immediately print the report, select the printer you wish to use and click the Print button.

Figure 4.35 - Hours Summary for Selected Requests with Printer Dialogue Box



After the report is generated, the printer dialogue box will close and the window will continue to display the selected report. You may examine the report before printing it by clicking the Cancel button on the dialogue box.

Figure 4.36 - Hours Summary for Selected Requests

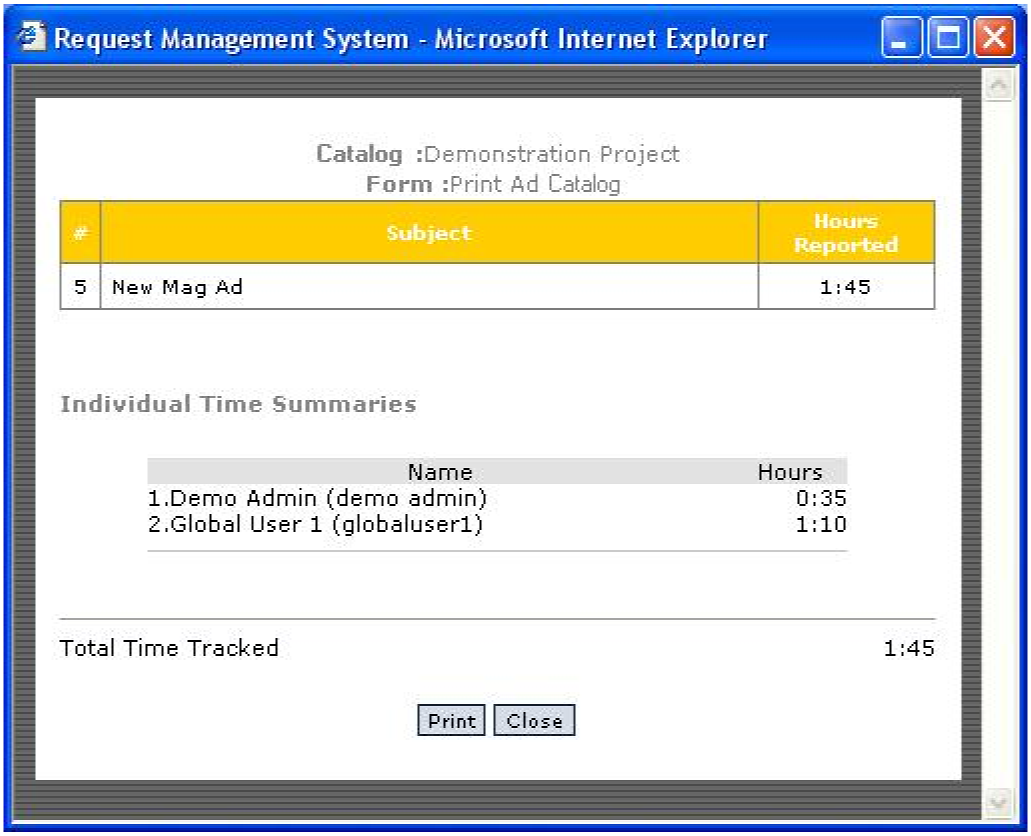


After examining the report, you may now print it by clicking the Print button. When you finished with this report, click the Close button. You may close the Hours Worked Summaries window by clicking the Close button and return to the Report Manager selection screen.

All the reports should be simple to understand. Hours Summary for Selected Requests lists information that allows you to identify the Request and the total of all hours reported against the request.

Hours Summary by Request and Individual displays two summaries. The upper table shows the total of all hours reported against each selected Request. The lower table shows the total of all hours reported by each person who reported time against the Requests in the current selection. The next figure shows an example of this report. The total of all time reported against this selection of Requests is displayed at the bottom. The report automatically omits all Requests without time reported.

Figure 4.37 - Hours Summary by Request and Individual



Hours Detail by Request and Individual provides detail by person reporting time by workflow Step. It prints each Request starting on a new page with the information supplied at Request creation time and all subsequent edits by Administrators. It then provides a table of time reported by person by Step followed by the total for the step. At the end of each Request, the total time reported for that Request displays. This report includes all selected requests even if they have no time reported.

Figure 4.38 - Hours Detail by Request and Individual

Request Management System - Microsoft Internet Explorer

Request 2 : Demo Pages

Request Body

Request Details	
Request Number	2

Subject	Demo Pages
Priority	High
Page URL	www.it-ontime.com
Bug or Enhancement	Is this a fix to an existing item?
Description	Please design new header for the landing page.
Request Type	Graphic [Change]
Date Wanted	3/30/2005
Creator Name	Demo Catalog Admin (DCatAdmin)
Last Update	3/8/2005 - 10:00

User Approval(s)

1.Art Direction *(Graphic Designer)*
Demo User (DUser)

Name	Date	Hours
1.Demo Local User (DLocalUser)	3/8/2005	1:30
Hours Worked		1:30

2.Designer QC *(Graphic Designer)*
Demo User (DUser)

3.Projet Planning *(ASP-Programmer)*
Demo User (DUser)

Name	Date	Hours
1.Demo Task Admin (DTaskAdmin)	3/9/2005	1:15
2.Demo User Admin (DUserAdmin)	3/9/2005	0:30
Hours Worked		1:45

4.Develope *(ASP-Programmer)*
Demo User (DUser)

Name	Date	Hours
1.Demo Local User (DLocalUser)	3/10/2005	2:43
2.Demo Task Admin (DTaskAdmin)	3/11/2005	0:20
3.Demo Catalog Admin (DCatAdmin)	3/14/2005	1:20
Hours Worked		4:23

5.Programming QC *(ASP-Programmer)*
Demo User (DUser)

Name	Date	Hours
1.Demo Catalog Admin (DCatAdmin)	3/16/2005	0:15
Hours Worked		0:15

Total Time Tracked 7:53

Print Close

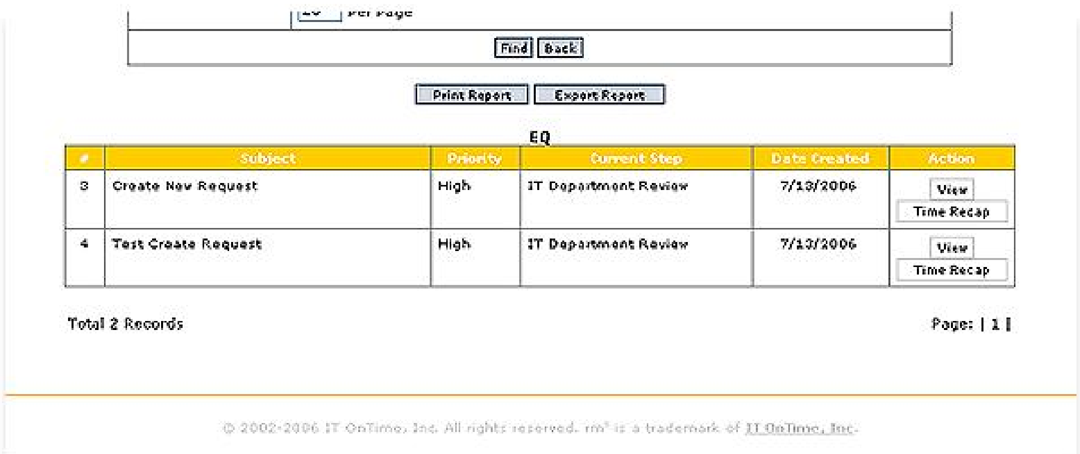
4.4 Exporting Data to an XML File

Since rm^{s} is designed to be part of an enterprise wide Service Delivery Management solution, there will be many instances where you will need to include that data in other systems or products. These include building formal reports for management or moving Requests to another system such as bug track or a processing system such as a Customer Service fulfillment system.

To make this easy to do, rm^{s} includes an industry standard XML export facility. If you do not know about XML as a data exchange language, you can go to the Microsoft Web site. Microsoft has an XML Center that contains specific Microsoft XML information as well as links to learning materials about XML. Also, The World Wide Web consortium (W3C), the keeper of the XML standard, has numerous XML documents on their Web site - www.w3c.org.

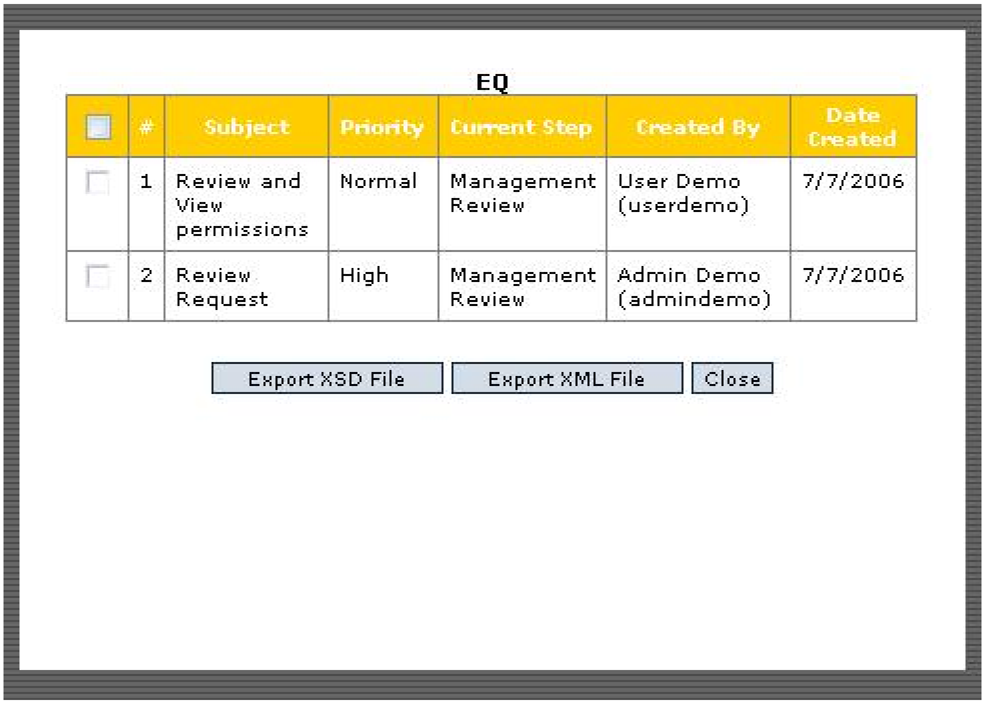
The rm^{s} XML facility uses the rm^{s} Report Manager selection screens. If you wish to export all Requests in a Form, go to Request Attribute Search and change Request Status to All by clicking the radio button. Click the Find button. The next figure shows the result.

Figure 4.39 - Advanced Search for All Requests



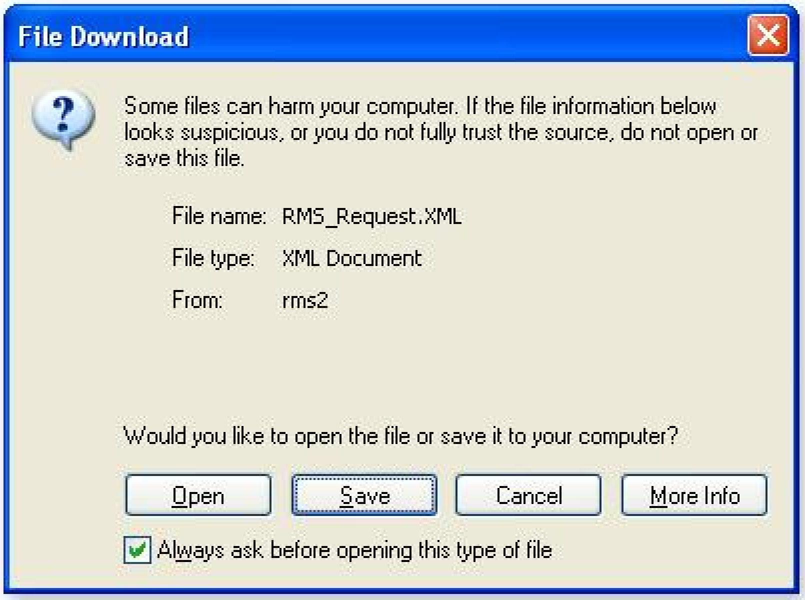
First click the Find button. After doing this, click the Export Report button. this will open a pop-up window showing all summary listing of all selected Requests. The next figure shows an example of this listing.

Figure 4.40 - Summary Export Listing



If the listing contains all the Requests you want to export, select items to include in your export by clicking the check box next to the Requests. To include all Requests, click the check box in the heading. Click the Export XML File button. A standard Microsoft Windows file browser dialogue box will open. This works identically to the Save or Save As in Microsoft Word or Microsoft Excel. Decide where to place the file and its name. Click Save to create the file. You can place the file in any folder you can access from your computer where you have write permission.

Figure 4.41 - Save XML File Dialogue



Once you have completed exporting the file, you can use it in any XML compliant application such as Microsoft Access 2003 or Microsoft Excel 2003. Just import the XML file. The XML standard includes in the file a description of its contents so that the application reading the file can understand it.

If the application you are using requires an XML schema, you can click Export XSD file. This will generate a schema file to use with your XML export file. The mechanics of saving this file are identical.

Top Level Intro

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

Part V

5 Configuration

Configuration allows you to change your personal settings. Update Your Profile allows you to update information about yourself and your system wide rm^s preferences. If your rm^s system uses ADSI for users, you will only be able to change the following settings. Personal information is always read from you network's Active Directory. Email On/Off permits you to change your email settings for each Step of each Form where you could receive emails. Email On/Off appears as two items, Step Email On/Off and Request Creator Email On/Off. Both are covered in the Email On/Off section.

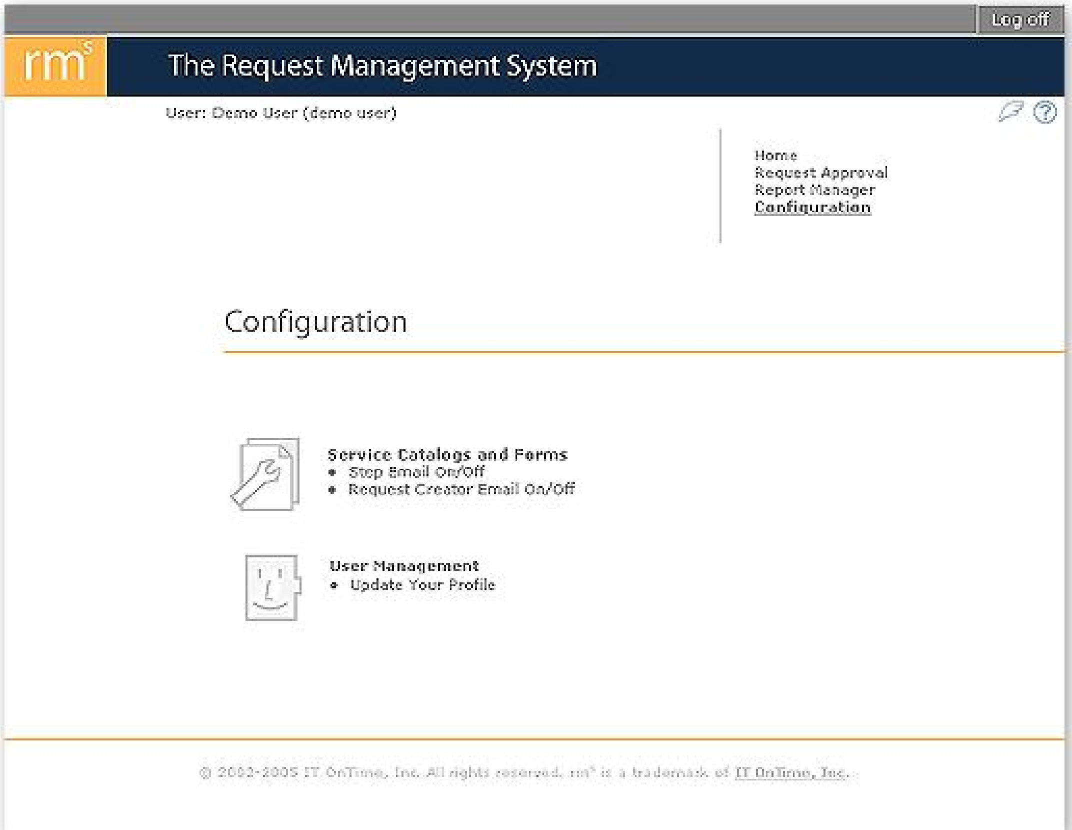
Email On/Off
Update Profile

5.1 Email On/Off

rm^s generates emails as Requests move through the fulfillment process defined by the Form's Workflow. As a Request Creator, you will receive an email each time your Request moves to a different Step. If you are also assigned to work on Request fulfillment doing Quality Assurance or other Steps in the Request fulfillment process, you will receive an email each time a Request reaches that step in the Workflow. If you are heavily involved in rm^s work for a Service Catalog, you may wish to turn off emails as you will be checking rm^s frequently.

There are two email configurations, Step Email On/Off and Request Creator Email On/Off. The mechanics of each are different but the result is the same, you can turn emails off if you want to and have permission to do so. To access either Email On/Off facility, click Configuration in the navigation area of any rm^s screen. If you are a User, you will see a screen similar to one shown in Figure 5.1

Figure 5.1 - Configuration / Email On/Off

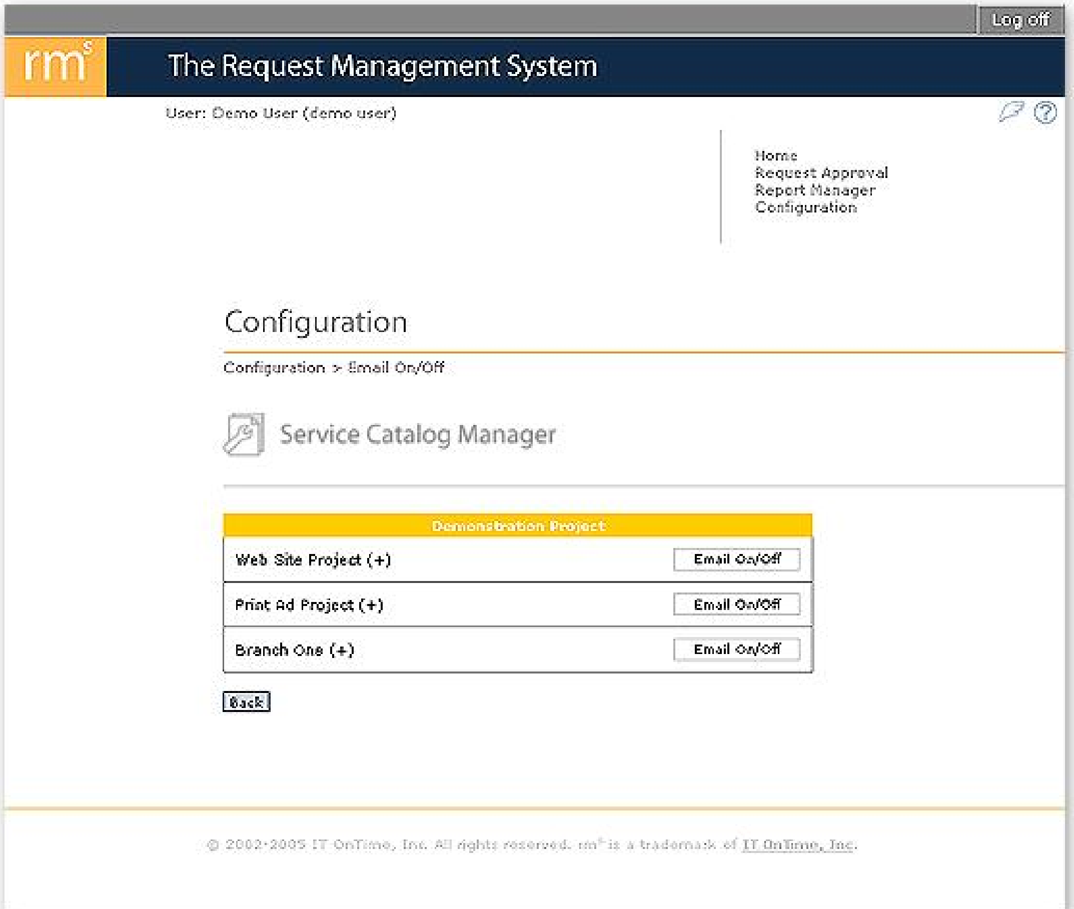


If you are assigned to any Service Catalogs, you will see either one or two entries under Catalogs and Forms. If you have permission to create Requests, you will see both Step Email On/Off and Request Creator Email On/Off. If you only can review Requests, then you will just see Step Email On/Off. If you have no assignments, Service Catalogs and Forms will not appear.

Step Email On/Off

As previously discussed, you ordinarily receive emails at any Step within rm^{s} where you have assignments to process Requests. If you want to suppress these emails, click Step Email On/Off. A screen similar to the one in Figure 5.2 will appear.

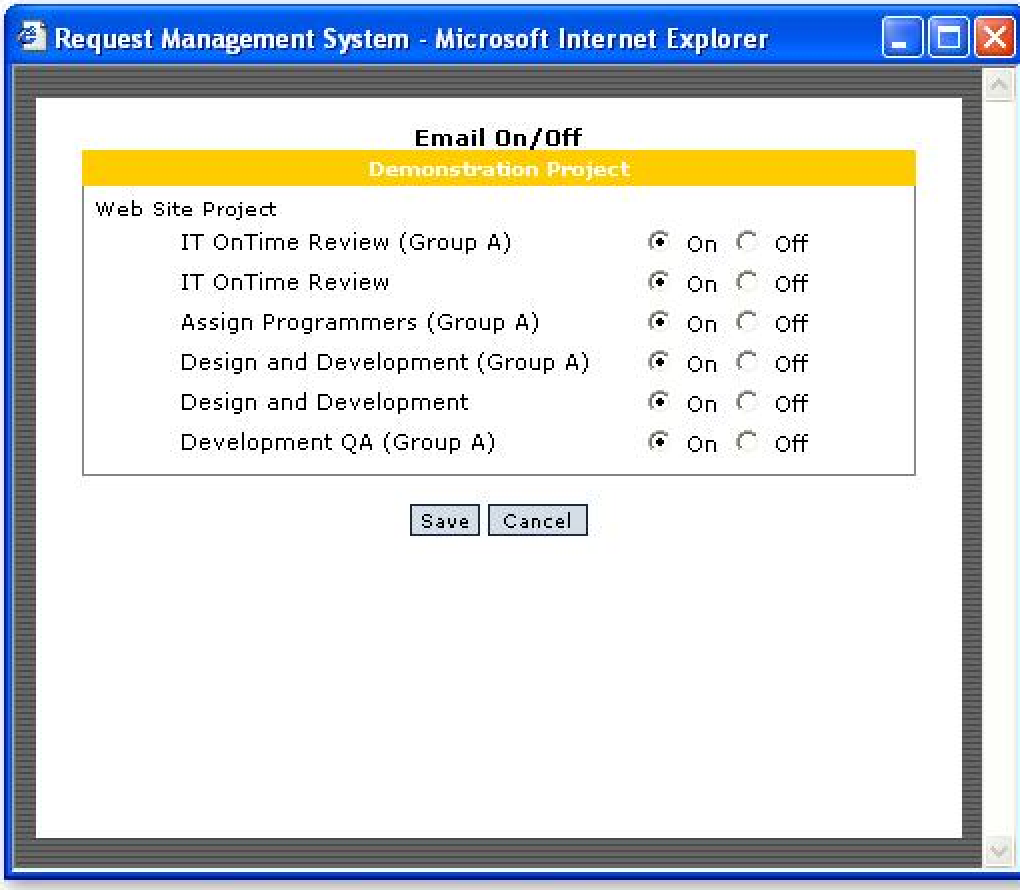
Figure 5.2 Step Email On/Off Manager



The screen contains a table for each Service Catalog where you have permissions. Within each table is the list of Forms where you have assignments and permissions. If you click the + sign next to the Form name, it will expand to show the Steps where you have permissions.

To change the email setting for any Step, click the Email On/Off button next to the Form name. A window similar to the one shown in Figure 5.3 will open.

Figure 5.3 Email On/Off



Next to each Step name are a pair of radio buttons. Click the On button if you wish to receive emails. Click the Off button if do not want to receive emails. After you have made your selections, click the Save button. The window will close and you have now changed your Step email settings.

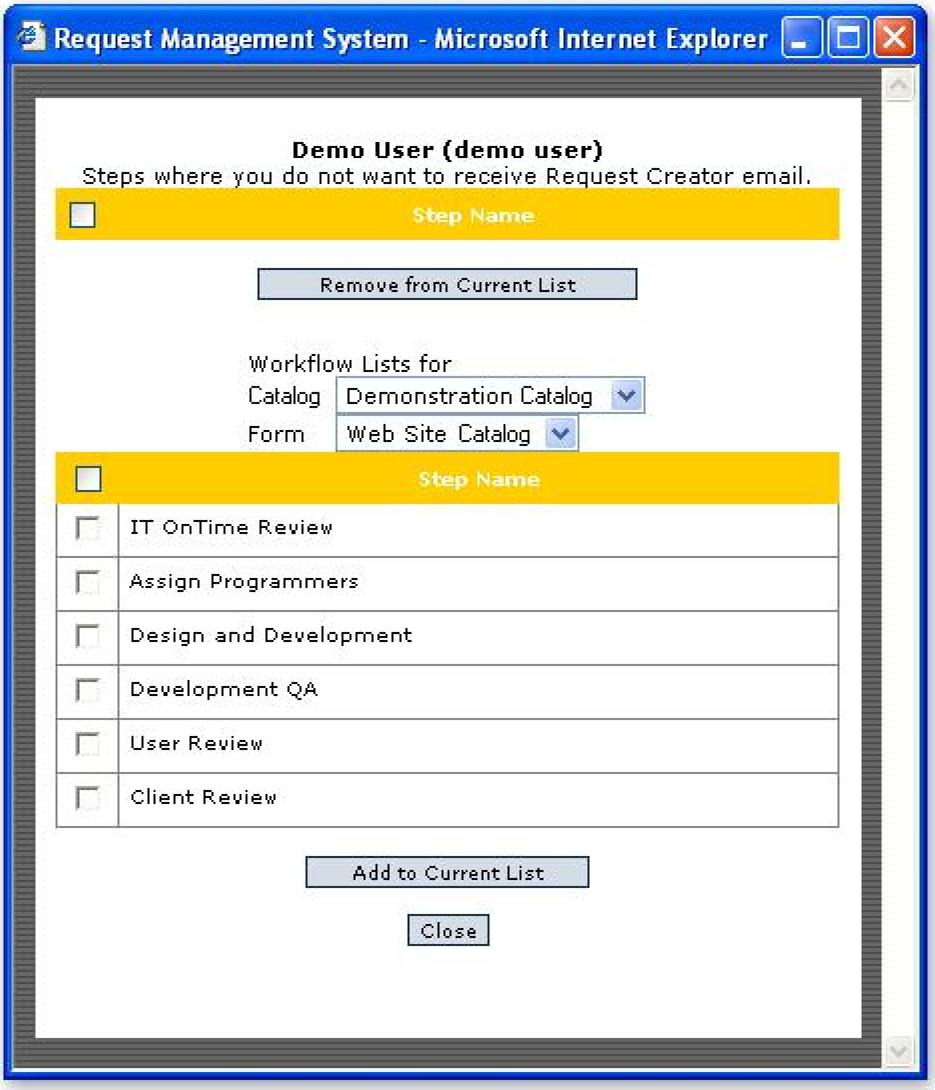
Request Creator Email On/Off

The general principles of Request Creator Email On/Off are like those for Step Email On/Off. If available, click Request Creator Email On/Off.

Figure 5.4 - Request Creator Email On/Off

Since the number of possible steps that your Requests may visit is very large, the information is presented as an exception list. If the list is missing, you will be receiving Request Creator emails for every step. To stop emails at specific steps, start by clicking the Add Step button. A new window will now open. It will be similar to the screen show in Figure 5.5.

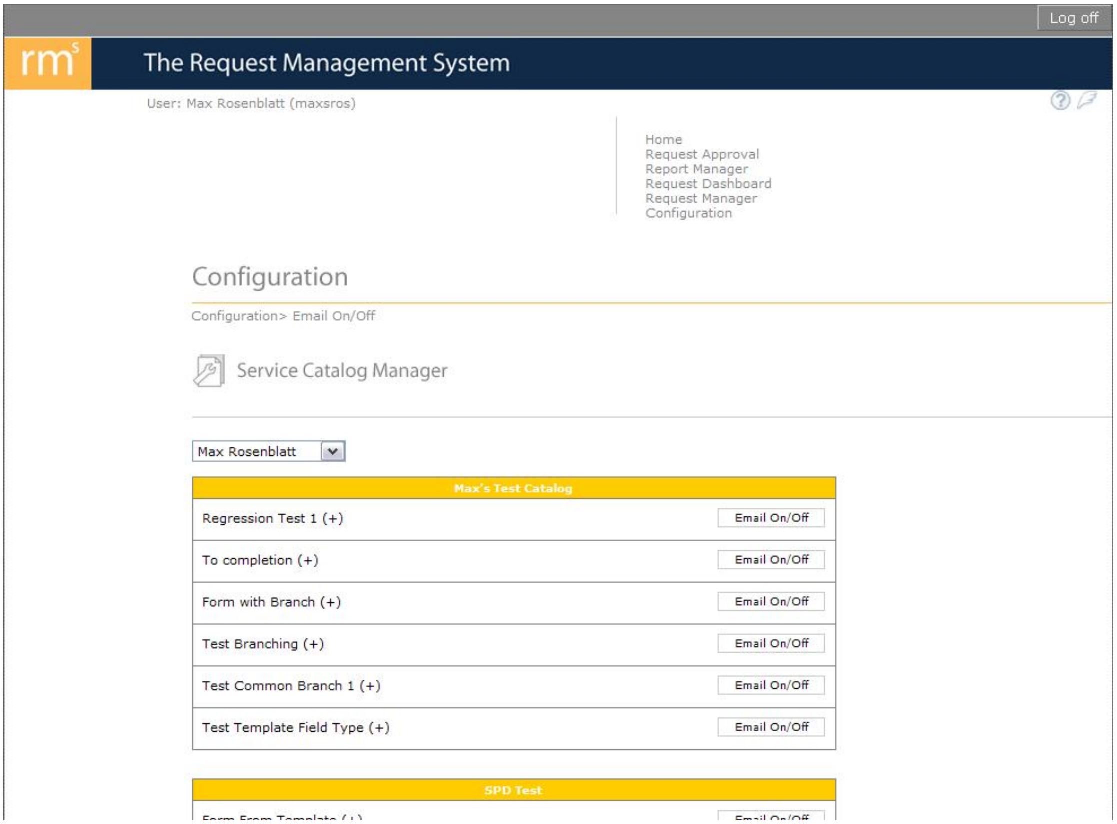
Figure 5.5 - Manage Request Creator Email Step List



The upper part of the screen contains the list of Steps where you have already turned off Request Creator emails. If you wish to remove a Step from this list, click the check box next to the name and the click the Remove from Current List button. To add a Step to the list, use the pull down list to select a Catalog and Form. Click the check box next to the name of every Step where you do not wish to receive emails. Click Add to Current List. After either of these operations, the list in the upper part of the screen will change.

If you are an Administrator, the screen shown in Figure 5.2 will contain a drop down list of all users that you can administer. This allows you as the Administrator view other users Step Email On/Off and Request Creator Email On/Off. Select the user from the drop down shown in the next figure. Their email information will display along with the same buttons allowing you to change the email settings. All other functions are identical.

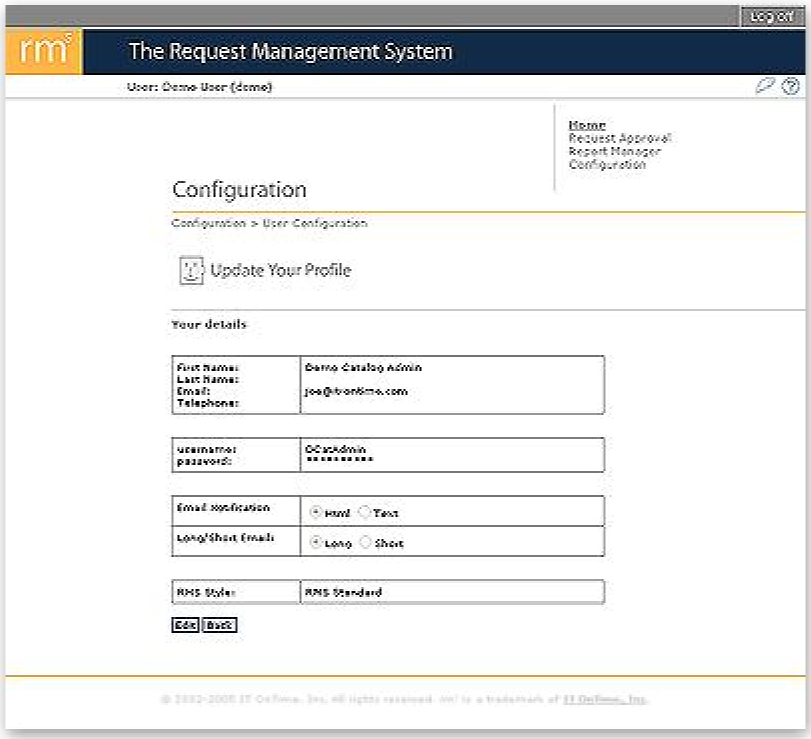
Figure 5.6 - Administrator Step Email On/Off



5.2 Update Your Profile

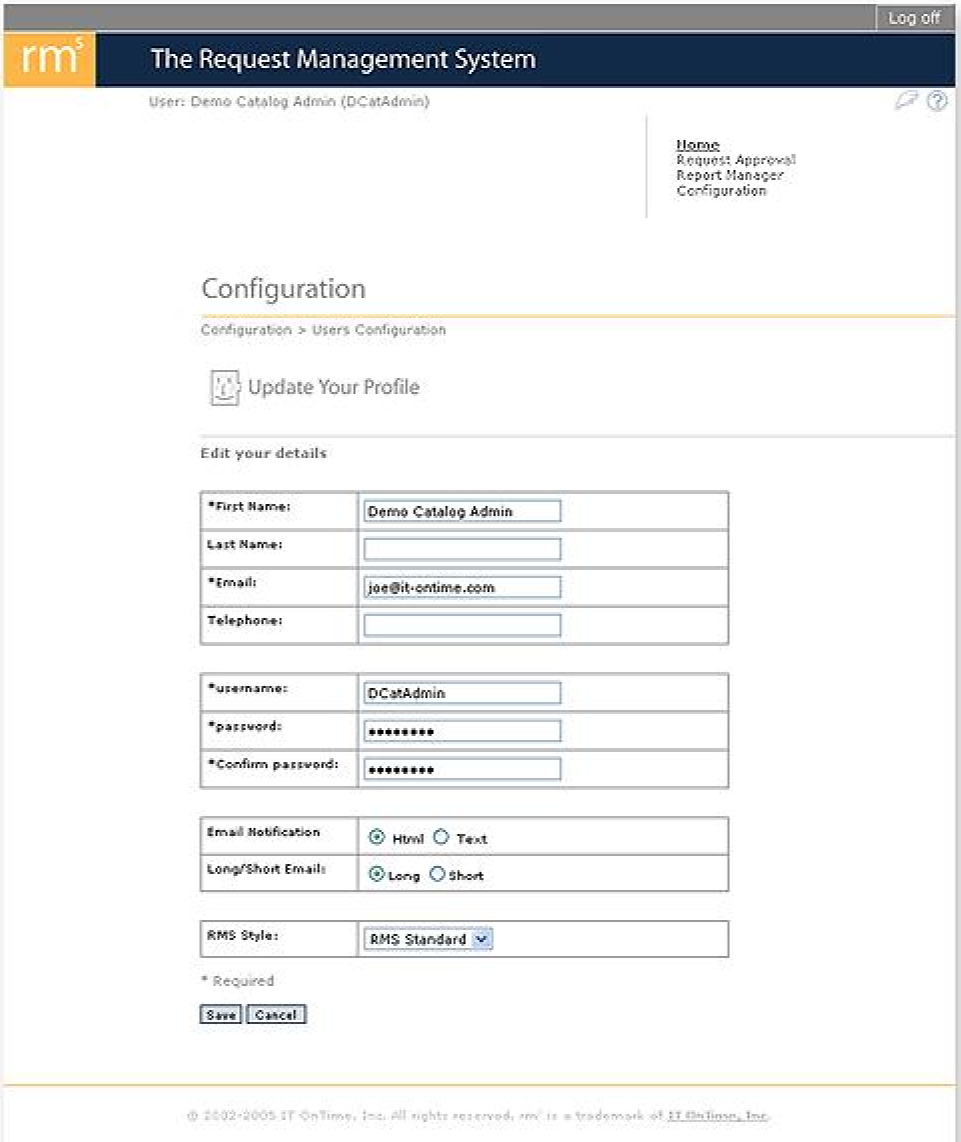
Update Your Profile allows you to change your password, edit your personal information, change the length and form of emails that rm^s sends to you and change the display rm^s display Style. When you first enter Update Your Profile, you will see your current information displayed on this screen.

Figure 5.7 - Update Profile



If you wish to change any of this information, click the Edit button on the bottom of the screen. The following screen will now appear.

Figure 5.8 - Update Your Profile - rm^s Defined User



The fields marked with an asterisk (*) are required. You must enter a value.

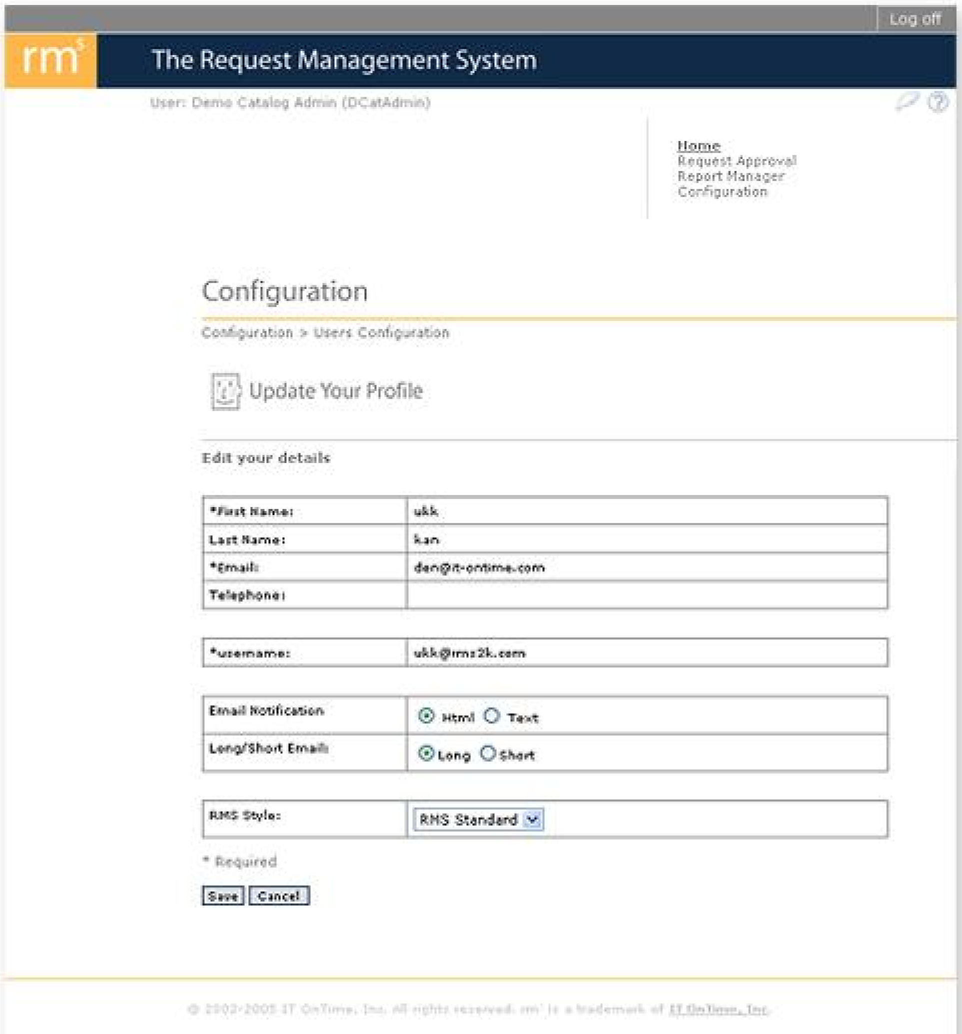
Email Notification specifies the format of the emails that rm^s will send to you. These notify you of the status of your Requests or inform you that a Request is now at a step where you must review it and act on it. The HTML emails are easier to read because of the better formatting available in HTML. However, if you cannot receive HTML emails or prefer not to receive them, select Text.

Long/Short Email chooses between an email that shows the history of the Request in the Long email and just the last Approval for Short emails. You can change these items at any, so please feel free to try different settings.

The last item, rm^s Style can be used to customize the look of rm^s.

If your rm^s user information comes from your network's Active Directory, you will see the form in the next figure. You cannot change any personal information but may change your email preferences and select an rm^s Style.

Figure 5.9 - Update Your Profile - ADSI Defined User



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