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The Request Management System Users Guide

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Title page 1

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The Request Management System Users Guide

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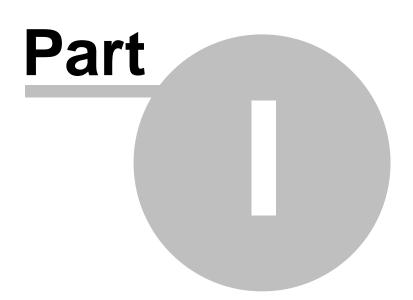
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Foreword

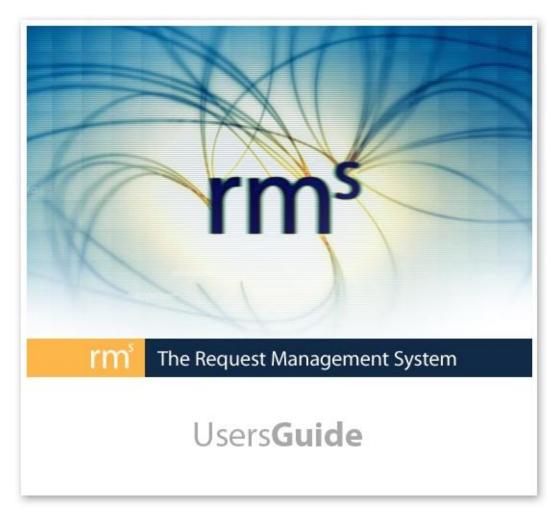
This is just another title page placed between table of contents and topics

Top Level Intro

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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.

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

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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

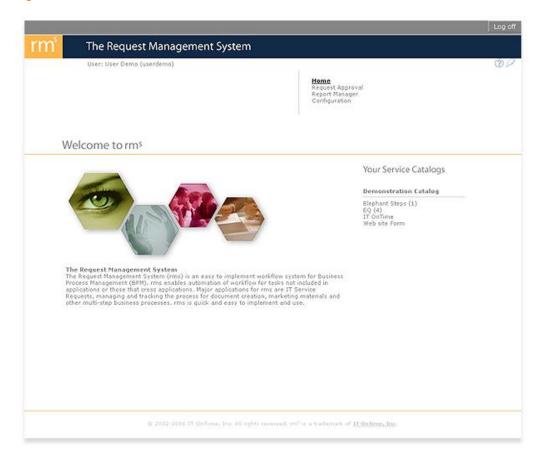


To log in, type your username in the box labeled username and password in the box labeled password. Remember that passwords are case sensitive. If you have Caps lock on or do not capitalize when required, rm^s will not recognize your password. Click the Submit button. Your rm^s username and password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

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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.

Quick Start	
Administrators' Manua	al
Users' Manual	
Readme	
Support	

Figure 1.3 - Administrator Help Menu

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

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 A	Administrator	Supplied Tex	t
------------	------------	-------------	---------------	--------------	---

	e will get back to you shortly.
	Demo@it-ontime.com
Subject:	
Moccocc	
Message	
	Send Close

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 <u>Support@it-ontime.com</u> 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 rms 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

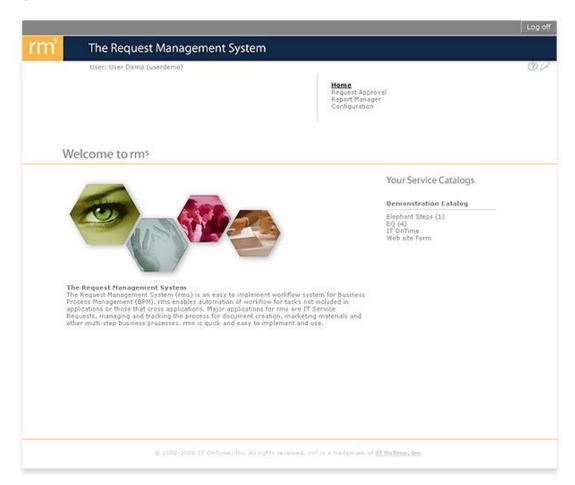
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2 The Main Screen

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 <u>The Report Manager</u>. Configuration - The rm^s function for changing your login details and email notification settings. See <u>Configuration</u>.

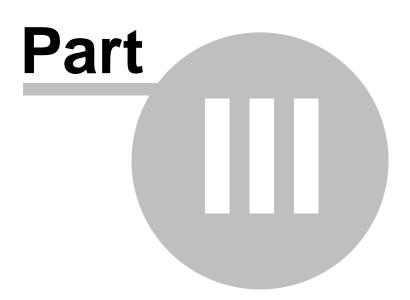
Administrators will see additional functions. These are discussed in the rm^s Administrators' Manual.

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, <u>Request Approval</u>.

Top Level Intro

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3 Request Approval

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The heart of rm^s 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 rm^s main screen. Alternatively, you can click on Request Approval on any rm^s screen.

Figure 3.1 - Your Service Catalogs

			Log off
rm	The Request Management System		
	User: Local User4 (localuser4)		O H
	R	lenc equest Approval eport Manager anfiguration	
We	lcome to rms		
	-	Your Service Catalogs	
		Max's Test Catalog	
		Form with Branch (7) Group Only Form (1) Regression Test 1 (4) Team Test Form test field edit form	
The solu unic eas not	Request Management System Request Management System (rms) enables Service Delivery Management (SDM) tions. It presents Service Catalogs to users who then create requests for services us workflow engine guides service requests from service consumers to fulfillers. r to set up and use. Custom service catalogs and request forms are ready for use weeks or months. rms provides a complete SDM solution managing requests withi artment or enterprise, whatever the size.	. Its ms is in hours	
	© 2002-2005 IT OnTime, Inc. All rights reserved; my is a t	radomaric et IT OnTimo, Inc.	

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 rm^s.

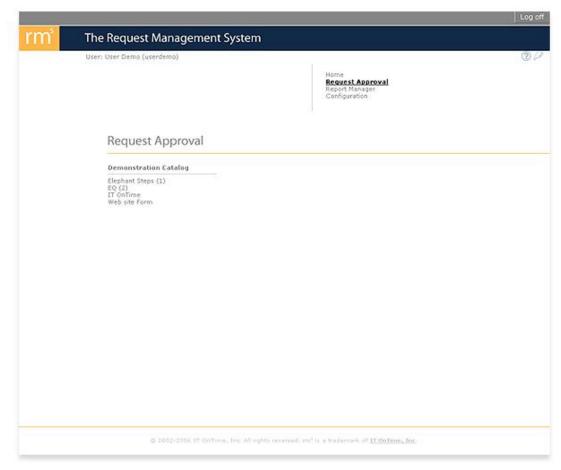


Figure 3.2 - The Request Approval Selection Screen

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.
- 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.

 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

Request Approval	25
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Reviewing a Request Inactive Requests

3.1 Creating a Request

26

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 <u>Reviewing a Request</u>. 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.

					Log off
rm The Reques	st Management System	1			
User: Local User4	(localuser4)				00
		Repor	e <mark>st Approval</mark> t Manager juration		
	Request Approval				
	Logged in As: User Admin 0	Catalog: Max's Test Catalog	Form: Group Only Form		
Active Requests	 Subject 	Priority	Current Step	Date	Action
Review Request Design and Development Design and Development Design and Development QA (1) Do Some Work QA Extra Last Step Inactive Requests Completed Canceled	Add Back				
	© 2002-8005 IT OnTime, Inc. All eq	ghta reserved: rm ^e ia a trade	maric of IT OnTime, Inc.		

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

			_		_	Logio
		agement System				200. 1
User: User Demo	(userdem	0)				Q
	Home Request Approval Report Manager Configuration					
	Red	quest Approval				
	La	igged in Asi Normal User Catalog	II Demonstration	i Catalog Formi EQ		
ctive Requests Enter an Enchancement Request		Subject	Priority	Creator Name	Date	Action
T Department Review Innocement Review (2)		Review and View permissions	Normal	User Demo (userdemo)	7/7/2006	Review Vie
issign Developers revelopment	2	Review Request	High	Admin Demo (admindemo)	7/7/2006	View
Relaza to Production User Review and Sign Off Iac tive Requests Completed Cangeled						
		-2004 IT ONTIME, INS. All rights sur-	unced, m ¹ 17 a t	radientics of 17 Octline, Inc.		

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, <u>Reviewing a Request</u>. 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.

User: Denne	equest Manag	ement System	Home Request App Report Mana Configuration	ler	0		
		er)	Request App Report Manag	ler	0		
I	Request App		Request App Report Manag	ler			
ł	Request App						
		roval					
1	Logged In Asi Norm	al User Catalog: Demonstration Catal	og Forma IT Or	Time			
Active Requests	Request Create			_			
Pequest		Request Datails					
Inactive Requests	* Subject						
o Completed o Canceled	* Priority	O Low O Normal O High O Urgent					
1000.0000	* Page URL						
		Enter the URL for the page to be change	14				
	bug or Enhancement	g or Enhancement					
		Please describe the work that you are re	questing. Upload	files for addit	ional det:		
	Request Type	Name	Add	Change	Remov		
		Content					
		Menu			0		
		Graphic					
		Hyperlinked File	0				
		External Hyperlink					
	Date Wanted	Please enter the date by which you require the vork completed.					
	Attachments		ich file(s)				
	Creator Name Demo Local User (DLocalUser)						
	Last Update	3/10/2005					
	* Denotes a required f	ield					
τ	Submit Save Canco	a					
		s. All rights reserved, ren ² 16 a Wademark.					

Figure 3.6 - Create a Request Input Form

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

The Request Input Screen Submitting 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

30

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

Figure 3.7	- The (Create a	Request I	nput i	Form
------------	---------	----------	-----------	--------	------

Logged in As: Norm	al User Catalog: Demonstration Cat	alog Form:ITOr	iTime	
quest Create				
	Request Detail	ls		
* Subject	<u>I</u>			
* Priority	O Low O Normal O High O Urge	ent		
* Page URL	Enter the URL for the page to be chan	aged.		
ug or Enhancement	Is this a fix to an existing item?			
* Description			~	
		Sector Demond 202	×	
Request Type	Please describe the work that you are Name	requesting. Upload	files for addit	
Request Type				
Request Type	Name	Add	Change	Remove
Request Type	Name	bbA	Change	Remove
Request Type	Name Content Menu		Change	Remove
Request Type	Name Content Menu Graphic		Change	Remove
Request Type Date Wanted	Name Content Menu Graphic Hyperlinked File	bbA	Change	
	Name Content Menu Graphic Hyperlinked File External Hyperlink External Hyperlink Please enter the date by which you rea	bbA	Change	
Date Wanted	Name Content Menu Graphic Hyperlinked File External Hyperlink External Hyperlink Please enter the date by which you rea	Add	Change	
Date Wanted Attachments	Name Content Menu Graphic Hyperlinked File External Hyperlink Please enter the date by which you re-	Add	Change	

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

* Creator Email Address	
	Ex. yourname@mail.com

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

82 E	
	100
	×

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

Figure 3.11 - Sample Number Field

* Phone	
---------	--

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

Date Wanted	
	Please enter the date by which you require the work completed.

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

[<<] [<	≤]	[<u>Print</u>] [.	≥]	[>>]
Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	<u>Z</u>
8	9	<u>10</u>	<u>11</u>	12	<u>13</u>	<u>14</u>
15	<u>16</u>	17	18	<u>19</u>	<u>20</u>	21
22	23	24	<u>25</u>	26	27	28
29	<u>30</u>	31	1	2	3	4

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

* Priority	OLow ONormal OHigh OUrgent	
------------	----------------------------	--

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

option(s)	Name	Add	Change	Remove
	Luminate			
	Glossy Uvs			
	Special Color			
	emboss			
	+ photo			

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

* Quantity	Please Select Quantity 🔽	
* option(s)	Please Select Quantity 1-500 pcs	Special color emboss + photo
File Upload	501-1,000 pcs 1,001-5,000 pcs 5,001 - 10,000 pcs	File Upload
Submit Save Cancel	20,000 pcs more than 20,000 pcs	

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

844 - L	• • • • • • • • •
Attachments	Attach File(s)
171	

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

Figure 3.18 - Attachments Screen

🗿 Request /	Management System - Mic	rosoft Intern	🗖 🗖 🔜
	Management System - Mic Attachments File Name Delete cupload extensions: *.doc; Upload Close	Size 26 KB Browse.	Date 8/13/2004

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.

hoose file				2
Look in	Biochuto	i.	0000	•
My Rocent Documents				
Desklop				
ly Documents				
My Computer				
My Network Places	File name:	description.bd	-	Open
	Files of type:	Al Fles (".")		Cancel

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.



Action(s)	Action	
-----------	--------	--

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

Location sources/images/ sources/images/	Action Add Add
and a second and a second s	
sources/images/	bbA
images/	Replace
images/	Replace
Replace ORemove	
Add	
	Delete Replace O Remove

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

* Description Image: state in a fix to an existing item? * Description Image: state in a fix to an existing item? Please describe the work that you are requesting. Upload files for additional describe the work that you are requesting. Upload files for additional description Request Type Name Content Image: state in a file Menu Image: state in a file Graphic Image: state in a file Hyperlinked File Image: state in a file External Hyperlink Image: state in a file Date Wanted Image: state in a file		al User Catalog: Demonstration Cat	alog Form : IT Or	nime	
* Subject	equest Create				
* Priority O Low O Normal O High O Urgent * Page URL Enter the URL for the page to be changed. *ug or Enhancement Is this a fix to an existing item? * Description Image: Content image: Con		Request Detail	5		
* Page URL Enter the URL for the page to be changed. sug or Enhancement Is this a fix to an existing item? * Description Image: Content image: Cont	* Subject	I			
Enter the URL for the page to be changed. Bug or Enhancement Is this a fix to an existing item? * Description Please describe the work that you are requesting. Upload files for additional describe the work that you are requesting. Upload files for additional describe the work that you are requesting. Upload files for additional describe the work that you are requesting. Upload files for additional describe the work that you are requesting. Upload files for additional describe the work that you are requesting. Upload files for additional describe the work that you are requesting. Upload files for additional describe the work that you are requesting. Upload files for additional describe the work that you are requesting. Upload files for additional describe the work that you are requesting. Upload files for additional describe the work that you are requesting. Upload files for additional describe the work that you are requesting. Upload files for additional describe the work that you are requesting. Upload files for additional describe the work that you are requesting. Upload files for additional describe the work that you are requesting. Upload files for additional describe the work that you are requesting. Upload files for additional describe the upload files for additing the upload files for additional describe the upload fi	* Priority	O Low O Normal O High O Urge	ent		
* Description * Description Please describe the work that you are requesting. Upload files for additional describe the work that you are requesting. Upload files for additional describe the work that you are requesting. Upload files for additional description Request Type Name Add Change Rem Content Image: Image	* Page URL	Enter the URL for the page to be chan	ged.		
Please describe the work that you are requesting. Upload files for additional de Request Type Name Add Change Rem Content I <td< td=""><td>Bug or Enhancement</td><td>Is this a fix to an existing item?</td><td></td><td></td><td></td></td<>	Bug or Enhancement	Is this a fix to an existing item?			
Request Type Name Add Change Rem Content I	™ Description			X	
Menu Image: Constraint of the second sec		Please describe the work that you are	requesting. Upload	files for additi	ional detail
Graphic Image: Constraint of the second se	Request Type				ional detail Remove
Hyperlinked File Image: Constraint of the second	Request Type	Name	Add	Change	
Date Wanted	Request Type	Name	bbA	Change	Remove
Date Wanted	Request Type	Name Content Menu		Change	Remove
	Request Type	Name Content Menu Graphic	bbA	Change	Remove
Please enter the date by which you require the work completed.	Request Type	Name Content Menu Graphic Hyperlinked File	bbA	Change	Remove
Attachments Attach File(s)		Name Content Menu Graphic Hyperlinked File External Hyperlink	bbA	Change	
Creator Name Demo Local User (DLocalUser)	Date Wanted	Name Content Menu Graphic Hyperlinked File External Hyperlink External Hyperlink Please enter the date by which you re	Add	Change	
Last Update 3/10/2005	Date Wanted Attachments	Name Content Menu Graphic Hyperlinked File External Hyperlink Please enter the date by which you re A	Add	Change	

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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).

m The	Request Managem	nent System		
User: C	llient (client)	0		
		Home <u>Request Approval</u> Report Manager Configuration		
	Request Approv	val		
	Logged in As: Normal U	ser Catalog: Demonstration Catalog Form: Print Ad Project		
tive Requests Client (2)	II.	Request 0 : fodfsafsfff		
Client Review Client Review	Request Body	Request Details		
active Requests	× Subject	Grand Openning Brochure		
Completed Canceled	* Priority	Ottormal OUrgent		
	* Creator Email Address	i jøe@it-ontime.com Ex. yourname@mail.com		
	* Phone	6698925256		
	* Due Date	09/30/2004 ESA (MM/DD/YYYY)		
	* Sriaf	We need an excellent idea to provide out client to join JIKHO grand openning Party		
	* Please Note	Contact me via email if possible		
	* Quantity	1-500 pcs		
	* option(s)	Luminate Glossy UVs 🖉 Special color 🖉 emboss 🛛 + photo		
	Action(s)	1. copy.doc 2. Pic_DOlh.jpg Action		
	Attachments	1. font.zip 2. sample.zip Attach file(s)		
	Submit Save Cancel	10. 		

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

Microso	ft Internet Explorer 🛛 🛛 🔀
?	Are you sure you want to submit this request?
	OK Cancel

- 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

Microsof	ft Internet Explorer 🛛 🔀
?	Are you sure you want to cancel creating this request without saving it?
	OK Cancel

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

Reply All Forward	hint Delete Previous	Next Addresses		
Client 13 Borneu 2547 17:35 Demo Admin ; Demo User ; L Demonstration Project - Prio	Norvik, Kanjasan I. Ad Peoject. 1 I. Grand Openning B	rochuze - Clienk		
	The	Request Manag	rm ^s	
a talog: Demonstration Ca orm : Print Ad Catalog equest No : 1. Grand Ope	bilog naise Brachum			I
equest No : 1, Grand Ope ear : Demo Admin , Demo				
lequest Sody Informatic	Request : 1. Grand Oper	ning Brochure		l,
Request Number	Request Deb	ake		
Subject	Grand Openning Brochure			
Priority	Urgent			
Creator Email Address	Joe Bit-entime.com			
Phone	434904321			
Dué Date	3/27/2004			
Bried	We need an excellent idea to JIKX0 grand opporting Party	provide our client to join		
Please Note	Contact me via email il possibi	*		
Quarkhy	1-500 per			
eption(s)	• Luminate			
Action(3)	File Name 1. cosy dec 2. Pic_001h.jpg	File Path /sources/ /sources/	Action File Add File Replace	
Attachments	File Name	Sito	Date	
	1. font.zip	126 KD	8/13/2004	
	2. sample.zip	291 KB	8/13/2004	
Creator Name	Glent (clem)			
Yachnical Note	** Saturad **			
Dato Creste	0/13/2004 - 06:35			
	Go to RM ⁶ ->			

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

Figure 3.28 - Text Email

File Edi	t View ⁻	Tools Me	ssag <mark>e Help</mark>				
See In the second secon	Reply All	VS Forward	Print	X Delete	Previous	Next	Addresses
From: Date: To: Subject:	Demo User 13 Septen Demo User Demonstra			roject : 1.We	b concept - IT	OnTime Re	view
)emonstrati eb Site Catal						
Request N	lo:1.Web	concept					
Dear : Der	no User						
		==== Reg	uest : 1. Wei	n concept ==			
	Body Inform		Details ====				
Request N							
Subject : V	Web concep	ot					
Priority : L							
	ame : Client ate : 8/13/20						
	Note : ** Sec						
User App	rowal(a)						
	IT On Time	Review ==					
	4 By : Demo	User (de	mo user)				
Assign U		10 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1					
	Jser (demo		ocument on l	a a al a arrest			
	3/2004 - 05:1		ocument of I	local server.			
Iume to P	MS · http://	WIND FOR	iestmanager	nent com/m	071		
			ww.it-ontim		1021		
	1. - e.u.s	And a second second		and an an and a local state of the second stat			
201 C							

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.

					Log off
rm The Reques	t Management System				
User: User Demo	(userdemo)	0.0			00
	Request Approval	Rep	e urst Approval ort Manager inguration		
		: Demonstration C	stalog Form: EQ		
Active Requests	Ø Subject	Priority	Current Step	Date	Action
 Interim Information Council IT Department Review (1) 	3 Create Nev Request	High	IT Department Review	7/13/2006	View
©Management Review (2) ©Assign Developers ©Development	2 Review and View permissions	Normal	Management Review	7/8/2006	View
©Geer Teating ©Assign Production Release ©Release to Production ©Geer Review and Sign Off Inactive Requests ©Completed ©Canceled					
	p 2002-2006 IT OATIMA, Inc. All rights rea	noond, int ^e ri a tood	etnick of 11 OnTime, Inc.		

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.
- 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

	Request 4 : Test Create Rec	quest	
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	Tast Create Request		
Request Type	Soreen (Add) Program Feature [Add] Data Field (Add] Report [Add] Program Logic (Add) Other [Add]		
Business User	Test Create Request		
usiness User's Email	tor_pido@hotmail.com		
Date Desired	7/2/2006		
Attachment(s)	File Name 1. <u>tokyodrift2.jpg</u>	Size 11 KB	Date 7/13/200
oroval(s)	IT Department Review	10.	
Approved By	User Demo (userdemo)		
Assigned Users	1. User Demo (userdemo)		
Date	7/17/2006 - 19:00		
roval	Management Review		
	T	Attach File(s)	
Attachments			
Attachments Time Tracking	F	Time Tracking	
		Time Tracking	-
Time Tracking		Time Tracking	2
Time Tracking	Admin Demo (admindemo)	Time Tracking	2

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.

	т	ime Tracking	an a	
	Name	Date	Hours	Action
		Delete		
Name	 Select Work Select Users 			
Date	7/13/2006	(MM/DD/1111)		
Hours		(HH:MM)		
		Add		
		Close		

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

			Hours		
ukk_task	11/15/2004	🖪 (мм/dd/үүүү)	1	: 30	(HH:MM)

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

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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

		-		_			Logio
rm The	Requ	es	t Management Syster	n			
User: C	Client (cli	ent)					B
	Por	~	est Approval		Home <u>Request Appr</u> Report Manager Configuration		
Active Requests ©Request creator © Client Review	32 33	- 99 -		monstration Catal	og Form:PrintAdi Status	Project Date	Actio
Client Review		7	Direction Sign Designs Project	Urgenc	Completed	8/13/2004	View
Inactive Requests	Г	e	Hotel Brochule	Urgenc	Completed	8/13/2004	View
		s	Hagazine Project	Normal	Completed	8/13/2004	Vie
Complete [7]		1		120000000000		8/18/2004	414
Complete [7]		4	Booklet and Manual	Urgenc	Completed	8/18/2004	-
Complete [7]	-	-		Urgenc Normal		10000	Vie
Complete [7]	Г	٥	Booklet and Manual		Completed	8/18/2004	Vier
o Canceled	Г	4	Booklet and Manual Stationary for Gigarryne	Normal	Completed	8/18/2004 8/18/2004	Viev Viev Viev Viev

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F

Top Level Intro

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



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 <u>View</u> and <u>Printing Request Information</u>. This capability is available from the 5th report type, Report Layouts.

Request Selection View and Printing Request Information Exporting Data to an XML File Viewing and Reporting Time Tracking Information

4.1 Request Selection

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

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Figure 4.1 - Accessing Reports From Main Page

	Log off
inagement System	
d = (d = n)	
	Home Request Approval Report Manager Configuration

This displays the following page.

Figure 4.2 - Report Manager

		Logoff
rm	The Request Management System	
	User: User Demo (userdemo)	00
	Home Request Approval Report Manager Configuration	
	Report Manager	
	Demonstration Catalog	
	Elephant Steps EQ IT OnTime Web site Form	
	\oplus 2002-2006 17 Online, Jac. All rights reserved, cm^5 is a Gademark of $\mathrm{H}_{2}0\mathrm{nBme}_{2}$. Joc.

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.

rm	The Reque	st Management System	Log off
	User: Demo User		Q 0
			st Approval <u>t Manager</u> uration
		Catalog : Demonstration Catalog	
	E	Print Ad Catalog	
		Print Ad Catalog	
	E.	Web Site Catalog	
		Browse Request Back	
	@ 2002-200	LT OnTime, free all rights reserved, rm^3 is a trademask of <u>LT OnTime</u>	se, Inc.

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

	Request Reports O Time Tracking Reports Search
	Report Selection Management
Search Request Versions	Current Version of Requests 💌
Field	Request No Containing
Request Status	Currently At Step All Steps Last Approved At Step All Steps Completed Canceled Archived All
Date Range	 ○ From 6/17/2006 103 To 7/17/2006 103 Date format MM/DD/YYYY ⊙ All Dates
Priority	All Priorities 💌
Created By	User Demo (userdemo) 💌
Worked On	All Persons
Assigned To	All Requests
	SORT
Order By	Request No 💌 Ascending 💌
Max. Records	20 Per Page

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

	Search	
	Report Salection Management	
Search Request Versions	Current Version of Requests 💌	
Field	Priority Squal Low S	
Request Status	Currently At Step IT Department Review V Last Approved At Step All Steps V Completed Canceled All	

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 S	Single	Date
---------------------------------------	--------	--------	------

User	: User Demo (userdemo)				
				Home Request Ap <u>Report Ha</u> Configurate	ager	
		1212				
		Form	Name :	Demonstration Catalog EQ ts O Time Tracking Reports		
				Search Section Management		
	Search Request	Current Versio				-
	Versions Field	Priority	1	Squal Urgent S		
		or 💌		Containing		
		and 💌				
		Date Desir	ed i	✓ before ✓ 07/17/20	06 [<u>113</u>]	
			۲	AND O OR		
	Request Status	Currently At All Step: C Last Approv All Step: Completed Canceled Archived	ed At Step			
	Oate Sange	O From 6/17/	2006 🔠			
	Priority	All Prioritios				
	Greated By	User Demo (us	erdemo) 💌	1		
	Worked On	All Persons All Steps 💙				
	Assigned To	All Requests				
	Older By	Request No	Ascendin	SORT		
	Max. Records	20 Per Page	al costantia			
		There is a second	E	Find Back		
			PrintRepor	T Export Report		15
_		il au co		EQ	-	1
1	Raview and View permit		Priority Normal	Management Review	Date Oreated 7/0/2006	Action Viau Time Recap
э	Create New Request		High	IT Department Review	7/13/2006	View Time Recap
4	Yest Create Request		High	IT Department Review	7/13/2006	View Time Recap
Total	3 Records				- 61 	Page: 1

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 <u>Tracking Time Worked</u>. 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 <u>Saving Report Specifications</u>.
- 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.

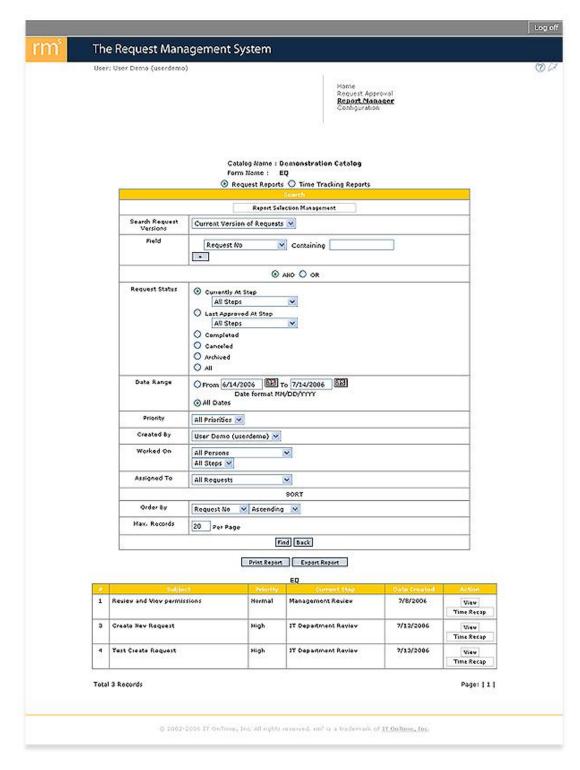


Figure 4.7 - Selecting a Request by Request Number

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 Rec	uest 4
----------	------	------	--------	--------

quest Body	P. A. B. A. B.		
Request Number	Request Details		
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]	1]	
Business User	Test Create Request		
Business User's Email	tor_pido@hotmail.com	8	
Date Desired	7/2/2006		
Attachment(s)	File Name 1. <u>tokyodrift2.jpg</u>	Size 11 KB	Date 7/13/2006

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.

uest Body	Request 4 : Test Create F	equest
	Request Details	
equest Number	4	
Subject	Test Create Request	
Print		Q
General Options		
Select Printer	2	
Select Printer Add Printer Status: Rea Location: Comment:	Lexmark X215 on SERVER01 Office Doc dy	Print to file Preference: Find Printer.
Add Printer Status: Rea Location:	on SERVER01 Office Doc	

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.

-			3			
equest Body	Request 2 : Swimming Pool Proje	ct				
	Request Details					
Request Number	2					
Subject	Swimming Pool Project					
Priority	Normal					
Creator Email joe@it-ontime.com Address						
Phone	98925256					
Due Date 10/11/2004						
Brief	Our Client need to do some ac themself, the main concept is request, please find and come	attaching	to this			
Please Note	call me					
Quantity	20,000 pcs					
option(s)	- + photo					
Attachedment(s)	File Name Size Date					
Creator Name	Client (client)					
Date Create	8/18/2004 • 06:44					
Creative Group He Demo Admin (der Art Direction Demo User (dem Copy Writer Demo User (dem QA Demo User (dem Client Review Client (client) 8/1 AE Review Demo Admin (der Printer Demo Admin (der AE Final QA Demo Admin (der Demo Admin (der Demo Admin (der Demo Admin (der	no admin) 8/13/2004 - 08:03 o user) 8/13/2004 - 06:05 o user) 8/13/2004 - 08:09 o user) 8/13/2004 - 08:09 3/2004 - 08:13 no admin) 8/13/2004 - 08:14 no admin) 8/13/2004 - 08:14		10 Minutes 2 Minutes 4 Minutes 4 Minutes 1 Minute 1 Minute			
Client (client) 8/1 Intal Time	3/2004 - 08:15		22 Minutes			
Nor Thine						

Figure 4.10 - Request 2 Time Recap

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.

quest Body	quest 14 : Fix request_many_l	ist.əsp			
	Request Details				
Request Kumber	14				
Bug Description	Fix request_many_list.asp				
Priority	Normal				
Release Number	Release 2.0				
Sug Symptoms	Please make the changes a shot.	s indicated on the screen			
Creator Name	Hax Resemblett (maxsres)				
Last Update	t Update 4/22/2004 - 22:53				
Request Type	Bug (Remove)				
Attachments	File Name	Size Date			
	1. request many list.jpp	157 KB 4/22/2004			
33 Pairoj Viriyadestr. 46 pairoj Viriyadestr. 46 pairoj Viriyadestr. 59 est System QA Max Rosenblatt (n usian and Dovelog Ukkawit Kanjasan regramming QA Ukkawit Kanjasan cost System QA Max Rosenblatt (n Load to Stoging S) Pairoj Viriyadestr. 17 Stoging QA Pairoj Viriyadestr. 28 do Production Pairoj Viriyadestr. 28	skul (pairojv) 6/3/2004 - naxsros) 7/22/2004 - 16:48 imment (ukk) 7/22/2004 - 21:07 (ukk) 7/23/2004 - 02:09 a (ukk) 7/23/2004 - 02:10 naxsros) 7/26/2004 - 02:10 naxsros) 7/26/2004 - 14:40 istem skul (pairojv) 7/27/2004 - i System skul (pairojv) 7/27/2004 -	4 Hours 19 Minutes 5 Hours 2 Minutes 1 Ninute			
Production Review Nax4 Test (max4t	and Approval est) 9/5/2004 - 05:23	40 Days 55 Minutes			
Design and Develo Ukkawit Kanjasan		22 Nours 59 Minutos			
Load to Test Syste Ukkawit Kanjasan	(ukk) 9/6/2004 - 04:25 m (ukk) 9/6/2004 - 04:25	3 Minutes			
	est) 9/6/2004 - 06:04	1 Hour 39 Minutes			
Load to Staging Sy Ukkawit Kanjasan	1 Day 20 Hours 54				
Staging QA		Minutes 2 Hours 59 Minutes			
Load to Production					
Production Review		19 Nours 2 Minutes			
Max4 Test (max4t	est) 9/9/2004 - 10:35	9 Hours 36 Minutes			
tal Time		139 Days 8 Hours 23 Minutes			
	Print Close				

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

	Request Man		Jacam				
User:	User Demo (userdemo	9		Home Request Ap Report Mo Configuration	Dager		
	_	Form	m Name : I	Damonstration Catalog EQ Is O Time Tracking Reports			
	Report Selection Minagement						
	Search Request Current Version of Requests						
	รายได้	Request N		Containing			
			۲	AND O OR			
	Request Status	Currently M Step All Steps Last Approved At Step All Steps Carpleted Carpleted Oraneled Oraneled					
	Date Ranșe	All From 6/14/ D All All D All	2006 EE	то 7/14/2006 📴 WDD/1111			
	Priority	All Priorities	28				
	Created By	User Demo (userdemo)					
	Warked On	All Persons					
	Assigned To All Requests						
	BORT						
	Order By	Request No	Ascendio	0 💌			
	Max. Records	20 Per Page	1				
			E	and back			
			Print Report	t Expart Repart			
1	Subject Review and View permissions		Priority Normal	Management Review	Oate Greated 7/8/2006	Action Wew Time Recap	
3	Create New Request		Migh	2T Department Review	7/13/2006	View Time Recap	
4	Tast Create Raquest		ыгдр	37 Department Raviav	7/13/2006	View Time Recap	
Total \$	3 Records					Page:	

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.

66

- 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

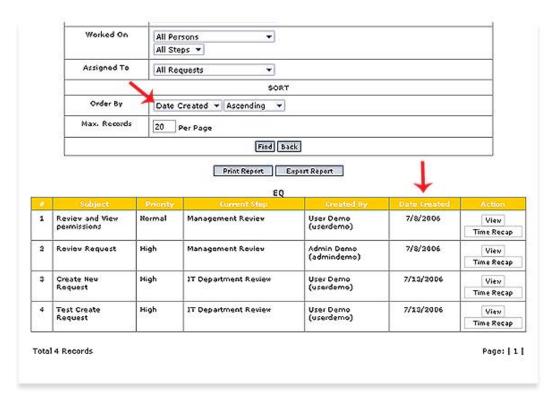
The following figure shows the Requests selected in the previous section.

Figure 4.13 - Selected Requests

	Subject	Priority	Current Step	Created By	Date Created	Action
1	Review and View	Normal	Management Review	User Demo	7/8/2006	View
	permissions			(userdemo)		Time Recap
2	Review Request High Managemen	Management Review	Admin Demo	7/8/2006	View	
		6.0	18	(admindemo)		Time Recap
3			IT Department Review	User Demo	7/13/2006	View
	Request			(userdemo)		Time Recap
4			IT Department Review	User Demo	7/13/2006	View
	Request			(userdemo)		Time Recap

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



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

Catalog Name : Demonstration Catalog Form Name : EQ

Request Reports
 Time Tracking Reports

	Report Selection Management	
Search Request Versions	Current Version of Requests 💌	
Field	Request No Containing	

The following pop-up window will now open.

Figure 4.16 - Report Selection Window

		Date	Action
	black and yellow 032206	3/21/2006 9:09:32 AM	Reload
Nam		ve Report	

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

20 Per Pa	ge		
	Find	Back	
	Print Report	Export Report	
	DMG	Bune	

Clicking the Print Report button will open the following window.



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.

S37 Worker Urgent Instill in Production (maxing) Max RoseRblatt 9/28/2003 orts S38 Worker list Checkory Urgent Attive Instill in Production (maxing) Max RoseRblatt 9/28/2003 Ing S38 Worker list Checkory Urgent Attive Instill in Production (maxing) Max RoseRblatt 9/28/2003 Ing S48 Morkers Worker list Checkory Urgent Instill in Production System(s) Max RoseRblatt Print S40 ADGI Users Urgent Instill in Production System(s) Max RoseRblatt (maxing) Max RoseRblatt (maxing) SelectPrinter Adder Printer Adobe PDF Brother DocuCom EPSON MFC-970 PDF Driver Stylus Pho S42 Urgent RoseRblatt (Common) Max RoseRblatt (maxing) Max RoseRblatt (maxing) Status: Ready Location: Comment Preference S43 Bad Miton RoseRblatt RoseRblatt RoseRblatt RoseRblatt RoseRblatt (Common) Max RoseRblatt (maxing) Status: Ready Location: Comment Preference S43 Wrong Normal Assign RoseRblatt		536	Activating Workers	Urgent	Install in Production System(s)	Max Rosenblatt (maxaros)	
338 Worker Not Oracidon Against Active Directory Ungent System(s) Install in Production System(s) Nax Poserblatt (maxing) 9/28/2003 329 Edit Users, Groups and Workers Normal System(s) Install in Production System(s) Max Reserblatt 9/28/2003 340 ADSI Users are shown as frace box for 22.2 / Loss frace box for 22.2 / Loss for 2		537	Deleted in Active	Urgent	Production System(s)	Rosenblatt	tt)
329 Cd Users, Srouss and Workers Nemal Droduction System(s) Max Reservice (Common) 340 ADSI Users are shown as finative System(s) Urgent Production System(s) Install in Production (Common) Max Reservice (Common) Max Reservice (Common) 341 Bad Conversion from 2.12 Access Database Urgent Production (Common) Install in Production (Common) Max Reservice (Common) Max Reservice (Common) 342 Upgent Database Install in Production (Common) Max Reservice (Common) Max Reservice (Common) 342 Upgent Database Install in Production (Common) Max Reservice (Common) Max Reservice (Common) 342 Upgent Abbitser Install in Production (Common) Max Reservice (Common) Max Reservice (Common) 342 Wong Rasigation Resorting Normal Assign Developers Max Reservice (Common) Max Reservice (Common) 343 Wong Resorting Normal Assign Developers Max Reservice (Common) Max Reservice (Common) 344 Internal Resorting Assign Developers Max Reservice (Common) Max Reservice (Common)	_	538	Checked Against Active	Urgent	Production System(s)	Rosenblatt	9/28/2005
Seb Abd Users are shown as fractive Urgent Statuin System(s) Max Rosenbla (maxred bytam(s) Max (maxred from 2.1.1 to 2.2 Access of 2.2 Access o	_	539	Edit Users, Groups and	Normal	Install in Production System(s)	Max Rosenbla	
0 Scoversion from 2.12 Access Maxima Production System(s) (Common) Reservite (maxared production (Common) Maxima 342 Upgerts an Edit Extrair an Edit Extrair navigation set Urgert Production (Common) Install in Production (Common) Maxima Reservite (Common) Maxima 543 Wrong navigation set Normal Reservite (Common) Maxima Reservite (Common) Maxima 544 Encorrect Time Reserving Normal Reservite (maxared (maxared (maxared) Maxima 544 Encorrect Time Reserving Normal Reservite (maxared) 544 Encorrect Time Reserving Normal Reservite (maxared) 544 Encorrect Time Reservite (Time Normal) Maxima 545 Encorrect Time (maxared) Normal Reservite (maxared) 546 Encorrect Time (Time Normal) Assign Reservite (Time Normal) 547 Encorrect Time (Time Normal) Assign Reservite (Time Normal)		540	are shown as	Urgent	Production System(s)	Rosenbla	[been 15, 15, 15, 15, 15,
ADSI Server on Edit Button Production System(s) Rosenbla (Common) Location: Comment Find Printe 543 Wrong Waxigation Normal Revelopers Assign Revelopers Max Rosenbla (maxared Page Range 544 Incorrect Time Reporting Normal Normal Assign Rosenbla (maxared Max Rosenbla (maxared Page Range 544 Incorrect Time Reporting Normal Assign (maxared Max Rosenbla 60 All Selection Correct Page 0 Page Rs 1	_	541	Conversion from 2.1.1 to 2.2 Access	Urgent	Production System(s)	Rosenbla	MFC-970 PDF Driver Stylus Pho
343 Wrong navigation bext Normal bext Assign Developers Max Rosenbla (maxrot 344 Incorrect Time Reporting Normal Normal Developers Max Rosenbla (maxrot 344 Incorrect Time Reporting Normal Normal Developers Max Rosenbla (maxrot 343 Uniment Max Rosenbla 344 Incorrect Time Reporting Normal Number of copies: 345 Developers Max Rosenbla 346 Developers Max Rosenbla 347 Developers Max Rosenbla 348 Developers Max Rosenbla 349 Developers Max Rosenbla 341 Selection Correct Page 341 Developers 1		542	ADS1 Server	Urgent	Production System(s)	Rosenbia	Location:
Reporting Developers Rosenble (maxarde Oselection OCurrent Page OPages 1		543	navigation	Normal		Rosenbia	Comment
OPages 1 Cotate Status		544		Normal		Rosenbla	All Number of copies: 1 🚖
Print Close Enter either a single page number or a single page range. For example, 5-12					Print Close	I	Enter either a single page number or a single 1월 2월 :

Figure 4.19 - Summary Report Printer Selection

Figure 4.20 - Summary Report

	Bug Description		Corrent Step		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

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.

	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 ADS1 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 Oay 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

Figure 4.21 - Time in the Request (All Steps)

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.



		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

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

No	Bug Description	(Common)) 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 53 Minutes
536	Activating Workers	Install in Production System(s) (Common)	Max Rosenblatt (maxsros)	3 Hours 5: 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 (maxsres)	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

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.

Specific To Browser Target Release Database Version Specific Problem Bug Severity Attachments Action(s) Last Update Creator Name Bug Symptoms Priority Priority Bug Description Request Id Current Step Time in Current Step		Available Columns	Select Fields for Repo	Columns Se	elected
Specific To Browser Target Release Database Version Specific Problem Bug Severity Attachments Action(s) Last Update Creator Name Creator Name Bug Symptoms Priority Bug Description Request Id Current Step Time in Current Step		Name	5		
Image: Specific Problem Image: Target Release Image: Database Version Specific Problem Image: Bug Severity Image: Action(s) Image: Action(s) Image: Last Update Image: Creator Name Image: Creator Name Image: Priority Image: Bug Description Image: Request Id Image: Current Step Image: Time in Current Step	Г	Urgency for Target Release		<i>40</i>	47
Database Version Specific Problem Bug Severity Attachments Action(s) Last Update Creator Name Bug Symptoms Priority Bug Description Request Id Current Step Time in Current Step	Π	Specific To Browser	-	View	Back
Bug Severity Attachments Action(s) Last Update Creator Name Bug Symptoms Priority Bug Description Request Id Current Step Time in Current Step	Г	Target Release	-		
Attachments Action(s) Last Update Creator Name Bug Symptoms Priority Bug Description Request Id Current Step Time in Current Step	Г	Database Version Specific Problem	-		
Action(s) Last Update Creator Name Bug Symptoms Priority Bug Description Request Id Current Step Time in Current Step	Γ	Bug Severity	-		
Last Update Creator Name Bug Symptoms Priority Bug Description Request Id Current Step Time in Current Step	Π	Attachments	Add All >>		
Add Selected > Bug Symptoms Priority Bug Description Request Id Current Step Time in Current Step	Г	Action(s)	<< Remove All		
Creator Name Bug Symptoms Priority Bug Description Request Id Current Step Time in Current Step		Last Update			
Bug Symptoms Priority Bug Description Request Id Current Step Time in Current Step	Γ	Creator Name			
Bug Description Request Id Current Step Time in Current Step	Π	Bug Symptoms	< Remove Selected		
Request Id Current Step Time in Current Step	Г	Priority	-		
Current Step Time in Current Step	Γ	Bug Description	-		
Time in Current Step	Γ	Request Id			
	Π	Current Step			
Time since Creation	Г	Time in Current Step	-		
		Time since Creation	-		
			1		

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

	Select Fields for Reporting		
Available Columns		Columns Se	lected
Name		Name	Order
		Bug Description	· v
		Priority	····· ¥
		Bug Symptoms	
		Bug Severity	
		Database Version Specific Problem	
		Specific To Browser	
	Add All >>	Target Release	· v
	<< Remove All	Urgency for Target Release	····· V
	Add Selected >	Action(s)	
	< Remove Selected	Attachments	0
	Γ	Creator Name	····· v
		Last Update	· ¥
		Request Id	💌
		Current Step	· 🗸
		Time in Current Step	· V
		Time since Creation	· V

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.

Available Columns	Fields for Reporting	Columns Se	lected
Name		Name	Order
		Bug Description	V
		Priority	*
		Bug Symptoms	
	Г	Bug Severity	
		Database Version Specific Problem	
		Specific To Browser	
Г	Add All >>	Target Release	Ascending 🗸
Ī	<< Remove All	Urgency for Target Release	v
	dd Selected >	Action(s)	
	Remove Selected	Attachments	
		Creator Name	V
		Last Update	V
	Γ	Request Id	
	Ē	Current Step	····· V
	Г	Time in Current Step	V
		Time since Creation	V

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

	Available Columns	Select Fields for Report	ing	Columns S	1
	Available Columns Name			Name	Order
	Specific To Browser			Target Release	
					·····
	Database Version Specific Problem		Γ	Urgency for Target Release	Ascending 💌
	Attachments	Add All >>	Г	Creator Name	·····
	Action(s)	<< Remove All			
Г	Last Update			Bug Symptoms	
Г	Priority	Add Selected >		Bug Severity	
	Bug Description	< Remove Selected		Current Step	V
	Request Id		Γ	Time since Creation	🗸
Г	Time in Current Step				
				View	Back

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

	Urgency for Target Release					
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	Losing or Corrupting Data - Fix Immediately	Development (Common)	52:09:0
		(maxing)	However, if I run the same code on my Windows XP laptop, the Change User Login to list is populated.	The infinesistery		
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)	45:03:2
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	21:02:4
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)	19:22:0
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)	19:21:5
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)	14:03:1
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)	69:16:1
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	12:02:2
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)	06:09:4
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.</owner></editor>	Display or Printing Problem - Major user impact.	Development (Common)	05:22:1
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)	01:10:2
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)	61:07:4
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)	13:22:0
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)	04:11:2
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	00:09:4

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

Hame : Demonstration Project Hame : Print Ad Catalog Hamest Reports ③ Time Tracking Reports

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

	*	Subject	Priority	Current Step	Hours Reported	
Г	3	Create New Request	w Request High IT Departm	IT Department Review	0:00	View
						Time Tracking
						Individual Time Summary
Г	4	Test Create Request	High	1T Department Review	0:00	Viev
						Time Tracking
						Individual Time Summary

If you read the previous section, <u>View and Printing Request Information</u>, 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.

84

Figure 4.31 - Request Time Tracking Summary

	Request [)etails			
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 spread.	to have magazi	ne ad 2 pag	es	
Please Note	none				
Quantity	more than 20,00	10 pcs			
option(s)	+ photo				
ser Approval(s) Account Executive Demo User (demo Creative Group Hea Demo Admin (der	b	Date 11/15/2004 11/15/2004	Hours 0:35 1:10		
1.Demo Admir					
1.Demo Admir	Hours Worked		1:45		

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.

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Figure 4.32 - Individual Time Summary

quest 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 maga spread.	zine ad 2 pages	
Please Note	none		
Quantity	more than 20,000 pcs		
option(s)	+ photo		
	Immaries Name in (demo admin) r 1 (globaluser1)	Hours 0:35 1:10	
		100000000	1:4

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

Hours Worked Summaries

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

Figure 4.34 - Report Options

Hours Summary for Selected Requests
53 J
Hours Summary by Request and Individual
Hours Detail by Request and Individual

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.

	1	Print A	Ad Catalog		
4	Subject	Priority	Cument Step	Hours Reported	
5	Nev Mag Ad	Urgent	Account Executive	1:45	
6	Smart Biz.inc Ads	Normal	Account Executive	0:00	
			Print Select Printer Add Printer Adobe	PDF Auto PinsPrik 2000 on SC.	nt EPSON Stylus Photo 810
			Location: Comment:		Find Printer.
			Page Range ③ All ③ Selection ① Curren ④ Pages: 1 Enter eithes a single page		Number of copies: 1

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.

		Priority	Current Step	Hours Reported
5	New Mag Ad	Urgent	Account Executive	1:45
;	Smart Biz.inc Ads	Normal	Account Executive	0:00
		Print	Close	

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.

	Catalog :Demonstration Projec Form :Print Ad Catalog	ct	
÷		Hou Repo	
5	New Mag Ad	1:4	5
ndi	vidual Time Summaries Name 1.Demo Admin (demo admin)	Hours 0:35	
ndi			

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.

				12
	Request 2 : Demo F	Pages		
equest Body				
	Request Detail	6		
Request Number	2			
Subject	Demo Pages			
Priority	High			
Page URL	www.it-ontime.com			
Bug or Enhancement	Is this a fix to an exis	ting item?		
Description	Please design new he	ader for the	landing	page.
Request Type	Graphic [Change]			
Date Wanted	3/30/2005			1
Creator Name	Demo Catalog Admin	(DCatAdmin)	
Last Update	3/8/2005 - 10:00			
1.Demo Local L) Name Iser (DLocalUser) Hours Worked <i>hic Designer)</i>	Date 3/8/2005	Hours 1:30 1:30	
-	Name Iser (DLocalUser) Hours Worked hic Designer)) P-Programmer))	3/8/2005	1:30	
.Designer QC (Grapi Demo User (DUser .Projet Planning (AS) Demo User (DUser	Name Iser (DLocalUser) Hours Worked hic Designer)) P-Programmer)) Name	3/8/2005 Date	1:30 1:30 Hours	
.Designer QC (Grapi Demo User (DUser .Projet Planning (ASI Demo User (DUser 1.Demo Task A	Name Iser (DLocalUser) Hours Worked hic Designer)) P-Programmer))	3/8/2005	1:30	
Designer QC (Grapi Demo User (DUser Projet Planning (ASI Demo User (DUser 1.Demo Task A 2.Demo User A	Name Iser (DLocalUser) Hours Worked <i>hic Designer</i>)) 	3/8/2005 Date 3/9/2005	1:30 1:30 Hours 1:15	
Designer QC (Grapi Demo User (DUser Projet Planning (AS Demo User (DUser 1.Demo Task A 2.Demo User A Develope (ASP-Prog Demo User (DUser	Name Iser (DLocalUser) Hours Worked <i>hic Designer</i>)) P- <i>Programmer</i>) Mame dmin (DTaskAdmin) dmin (DUserAdmin) Hours Worked grammer)) Name	3/8/2005 Date 3/9/2005 3/9/2005 Date	1:30 1:30 Hours 1:15 0:30 1:45 Hours	
Designer QC (Graph Demo User (DUser Projet Planning (ASI Demo User (DUser 1.Demo Task A 2.Demo User A Develope (ASP-Prog Demo User (DUser 1.Demo Local U	Name Jser (DLocalUser) Hours Worked <i>bic Designer</i>)) - <i>Programmer</i>)) Name dmin (DTaskAdmin) dmin (DTaskAdmin) dmin (DUserAdmin) Hours Worked grammer)) Name Jser (DLocalUser)	3/8/2005 Date 3/9/2005 3/9/2005 Date 3/10/2005	1:30 1:30 Hours 1:15 0:30 1:45 Hours 2:43	
Designer QC (Grapi Demo User (DUser Projet Planning (ASI Demo User (DUser 1.Demo Task A 2.Demo User A Develope (ASP-Prog Demo User (DUser 1.Demo Local U 2.Demo Task A	Name Iser (DLocalUser) Hours Worked <i>hic Designer</i>)) P- <i>Programmer</i>) Mame dmin (DTaskAdmin) dmin (DUserAdmin) Hours Worked grammer)) Name	3/8/2005 Date 3/9/2005 3/9/2005 Date	1:30 1:30 Hours 1:15 0:30 1:45 Hours 2:43 0:20	
Designer QC (Grapi Demo User (DUser Projet Planning (ASI Demo User (DUser 1.Demo Task A 2.Demo User A Develope (ASP-Prog Demo User (DUser 1.Demo Local U 2.Demo Task A 3.Demo Catalo	Name Iser (DLocalUser) Hours Worked <i>bic Designer</i>)) <i>P.Programmer</i>) Name dmin (DTaskAdmin) dmin (DUserAdmin) Hours Worked <i>prammer</i>)) Name Jser (DLocalUser) dmin (DTaskAdmin) g Admin (DTaskAdmin) g Admin (DTaskAdmin)	3/8/2005 Date 3/9/2005 3/9/2005 3/10/2005 3/11/2005	1:30 1:30 Hours 1:15 0:30 1:45 Hours 2:43 0:20	
2.Designer QC (Graph Demo User (DUser Projet Planning (ASP Demo User (DUser 1.Demo Task A 2.Demo User A Demo User (DUser 1.Demo Local U 2.Demo Task A 3.Demo Catalo .Programming QC (A Demo User (DUser	Name Iser (DLocalUser) Hours Worked hic Designer)) 	3/8/2005 Date 3/9/2005 3/9/2005 3/10/2005 3/11/2005 3/14/2005 Date	1:30 1:30 Hours 1:15 0:30 1:45 Hours 2:43 0:20 1:20 4:23 Hours	
2.Designer QC (Graph Demo User (DUser Projet Planning (ASP Demo User (DUser 1.Demo Task A 2.Demo User A Demo User (DUser 1.Demo Local U 2.Demo Task A 3.Demo Catalo .Programming QC (A Demo User (DUser	Name Iser (DLocalUser) Hours Worked bic Designer)) Peprogrammer) Name dmin (DTaskAdmin) dmin (DUserAdmin) Hours Worked orammer) Name Jser (DLocalUser) dmin (DTaskAdmin) g Admin (DTaskAdmin) Hours Worked ISP-Programmer) Name g Admin (DCatAdmin)	3/8/2005 Date 3/9/2005 3/9/2005 3/10/2005 3/11/2005 3/14/2005 Date	1:30 1:30 Hours 1:15 0:30 1:45 Hours 2:43 0:20 1:20 4:23 Hours 0:15	
2.Designer QC (Graph Demo User (DUser Projet Planning (ASP Demo User (DUser 1.Demo Task A 2.Demo User A Demo User (DUser 1.Demo Local U 2.Demo Task A 3.Demo Catalo .Programming QC (A Demo User (DUser	Name Iser (DLocalUser) Hours Worked hic Designer)) 	3/8/2005 Date 3/9/2005 3/9/2005 3/10/2005 3/11/2005 3/14/2005 Date	1:30 1:30 Hours 1:15 0:30 1:45 Hours 2:43 0:20 1:20 4:23 Hours	
2.Designer QC (Graph Demo User (DUser Projet Planning (ASP Demo User (DUser 1.Demo Task A 2.Demo User A Demo User (DUser 1.Demo Local U 2.Demo Task A 3.Demo Catalo .Programming QC (A Demo User (DUser	Name Iser (DLocalUser) Hours Worked bic Designer)) Peprogrammer) Name dmin (DTaskAdmin) dmin (DUserAdmin) Hours Worked orammer) Name Jser (DLocalUser) dmin (DTaskAdmin) g Admin (DTaskAdmin) Hours Worked ISP-Programmer) Name g Admin (DCatAdmin)	3/8/2005 Date 3/9/2005 3/9/2005 3/10/2005 3/11/2005 3/14/2005 Date	1:30 1:30 Hours 1:15 0:30 1:45 Hours 2:43 0:20 1:20 4:23 Hours 0:15	7:53

Figure 4.38 - Hours Detail by Request and Individual

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.

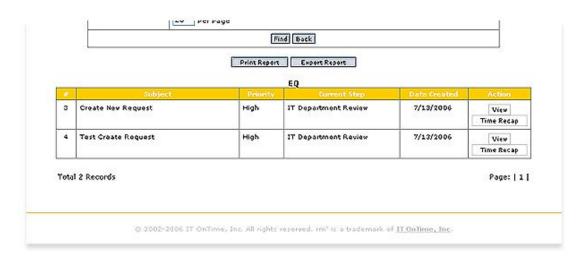
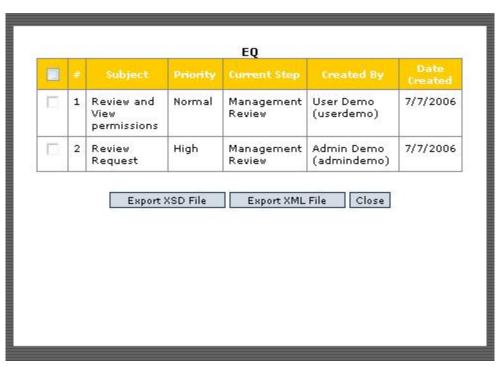


Figure 4.39 - Advanced Search for All Requests

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.





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

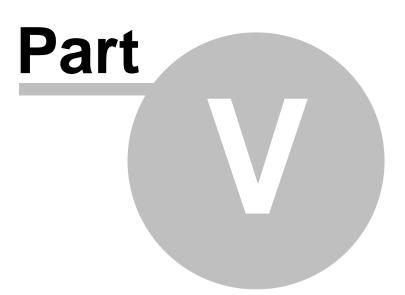
File Dov	wnload				
?	Some files can harm your computer. If the file information belo looks suspicious, or you do not fully trust the source, do not o save this file.				
	File name: RM5_Request.XML				
	File type: XML Document				
	From: rms2				
	Would you like to open the file or save it to your computer	?			
	Open Save Cancel M	ore Info			
_	Always ask before opening this type of file				

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



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

			Logo
The Reque	st Management System		
User: Demo User	(demo user)		Ø
		Home Request Approval Report Manager <u>Configuration</u>	
Config	guration		
E.	Service Catalogs and Forms • Step Email On/Off • Request Creator Email On/Off		
	User Management • Update Your Profile		
0 2002-2005	IT. OnTime, Inc. All rights reserved, im ⁵ is	a trademask of IT OnTime, Inc.	

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

			Log off
m	The Request Management Sy	rstem	
	User: Demo User (demo user)		00
		Home Request Approval Report Manager Configuration	
	Configuration		
	Configuration > Email On/Off		
	Tell Carrier Carrier Marco		
	Service Catalog Manag	er	
		241114	
	Demonstratio		
	Web Site Project (+)	Email Oa/Off	
	Print Ad Project (+)	Email On/Off	
	Branch One (+)	Email ⊙n/⊙fí	
	Back		
	© 2002-2005 IT OnTime, Inc. All rights res-	roed, no is a diadomain of II durante, Inc.	

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

Email On/Off	
Demonstration Project	ct
Web Site Project IT OnTime Review (Group A)	⊙ on C off
IT OnTime Review	On C Off
Assign Programmers (Group A)	• on C off
Design and Development (Group A)	🖲 On C Off
Design and Development	⊙ on C off
Development QA (Group A)	🖲 On Ć Off
Save Cancel	

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

The Request Management Sy User: Domo User (domo user) Configuration	<i>y</i> stem	Home Request Approval Report Manager Configuration	93
22 V.		Request Approval Report Manager	90
Configuration		Request Approval Report Manager	
Configuration			
Configuration > Email On/Off			
Request Creator Email On/Off The Request Creator will not receive en Add stop Back	ails for steps listed be	low.	
@ 2002-2004 IT OnTime, Inc. All rights res	erved, rm ¹ is a tradem	ark of <u>IT OnTime, Inc</u> .	
	Service Catalog Manager Request Creator Email On/Off The Request Creator will not receive em Add Stop Back	Service Catalog Manager Request Creator Email On/Off The Request Creator will not receive emails for steps listed be Add Stop Back	Service Catalog Manager Request Creator Email On/Off The Request Creator will not receive emails for steps listed below.

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.

	Step Name
	Remove from Current List
	Workflow Lists for Catalog Demonstration Catalog 💙 Form Web Site Catalog 💙
Г	IT OnTime Review
Г	Assign Programmers
Γ	Design and Development
Г	Development QA
Г	User Review
Г	Client Review
	Add to Current List Close

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

rm°	The Request Management System		
	User: Max Rosenblatt (maxsros)		32
		Home Request Approval Report Manager Request Dashboard Request Manager Configuration	
	Configuration		
	Configuration> Email On/Off		
	Service Catalog Manager		
	Max Rosenblatt 🔽 Maa's Test Catalog		
	Regression Test 1 (+)	Email On/Off	
	To completion (+)	Email On/Off	
	Form with Branch (+)	Email On/Off	
	Test Branching (+)	Email On/Off	
	Test Common Branch 1 (+)	Email On/Off	
	Test Template Field Type (+)	Email On/Off	
	- SPD Test		
	Earm Eram Tamplata (i)	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

 User: Dame User (dame)		P 6
Configuratio	on	tizzar Peduest Approvel Report Manager Configuration
Configuration > User	Cenfiguration	
Update You	ur Profile	
Fuis Name: Lait Name: Ernsil: Telephone:	Demo Catalog Admin Joe@itrantime.com	
ucernamo: pasavord:	OCstAdmin	
Email Xosticasion	@ Hant C Texa	
Long/Shart Emails	€ Long ○ Shert	
RHS Dates	RMS Standard	
Edk Buck		

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 - U	pdate Your	Profile - rm ^s	Defined	User
----------------	------------	---------------------------	---------	------

and the second			Log o
m	The Request Mana	agement System	
	User: Demo Catolog Admin (C)CatAdmin)	Ueme .
			Request Approval Report Manager Configuration
	Configuratio	n	
	Configuration > Users	Configuration	
	Update You	r Profile	
	Edit your details		
	*First Name:	Demo Catalog Admin	
	Last Name:		
	*Email:	joe@it-ontime.com	
	Telephone:		
	*usemame:	DCatAdmin	
	*password:		
	*Confirm password:	•••••	
	Email Notification	Html Text	
	Long/Short Email:		
	RMS Style:	RMS Standard 🛩	
	* Required		53
	Save Cancel		

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.

m	The Request Manag	ement System		
		emene system		
	User: Demo Catalog Admin (DC)	atAdmin)	12	20
			<u>Home</u> Request Approval Report Manager Configuration	
	Configuration			
	Configuration > Users Co	onfiguration		
	Update Your F	Profile		
	Edit your details			
	*First Name:	ukk		
	Last Name:	kan		
	*Email:	den@it-ontime.com		
	Telephones			
	*usemame:	ukk@ms2k.com		
	Email Notification	⊙ Html ○ Text		
	Long/Short Emails	⊙Long ○Short		
	RMS Style:	RMS Standard 💌		
	* Required			
	Save Cancel			

Figure 5.9 - Update Your Profile - ADSI Defined User

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- | -

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Total time 57

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