# THE RQC ACCESS APP USER DOCUMENTATION

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## PROJECT GOAL

* RQC Access Process Automation in order to reduce delays, errors and increase productivity.

## PROJECT OBJECTIVES

* Create a user-friendly form for RQC Access Requests
* Create a user-friendly form for RQC Access Removals
* Create a user-friendly form for RQC Access Modification
* Integrate the App with Service-now RQC process flow
* Integrate the App with up-to-date Lawson data

## TIMELINE

1. February 20, 2020: Begins training on SSIS
2. March 2020:
   1. Requirements gathering and analysis begins
   2. Evaluate SSIS as a backend solution for the RQC Access Request App's data models
   3. Prototyping begins
   4. Self-training for SharePoint Front-end Technologies - Evaluate which SharePoint front-end framework would work better for the RQC Access Request APP Implementation.
3. April 2020:
   1. Requirements review and scoping
   2. Setup a Development environment for the App Implementation
   3. Setup a SharePoint tenant for testing the App
   4. Backend development for data model generation begins in SSIS
   5. Frontend development begins using SharePoint framework with REACT
4. May 2020:
   1. Self-training on how to setup and use Microsoft Graph to access data stored in Microsoft cloud (SharePoint, Office365,...) – skills needed for making API calls from the APP to the backend data models
   2. Backend development and Integration with SharePoint
   3. Frontend development
5. June 2020:
   1. Alpha testing starts in TEST server
   2. Frontend development and Integration with Service-now QA
6. July 2020:
   1. Beta testing starts in TEST server
   2. App Install in Production and User Acceptance test begins
   3. APP integration with Service-now Demo
7. August 26, 2020 - Target date for Production release

## APP OVERVIEW

The RQC Access App is a tool that allows Budget Managers and Financial Analysts to Request, Remove, or Modify an employee’s permissions to submit internal and/or external requisitions in Lawson. The App is a custom SharePoint Webpart created using a custom **development** environment setup to build **SharePoint Framework** solutions with REACT.

The App uses Microsoft Graph libraries to make API calls to the backend data models. This enables the app to detect if the user of the app has the right permissions to complete the forms. Completion of any of the forms should trigger a Service-now process flow for RQC.

In production, the App is accessible **only** from the Financial Services Site.

## APP & INTEGRATIONS

Service-Now

Lawson

ETL

JAX SSIS

Data Models

JAX SharePoint Tenant

## APP FEATURES

The App implements three forms:

1. **The New Permissions Form**
   1. Description: used **to request** permissions for an employee to submit internal and/or external requisitions in Lawson. Completion of this form will trigger the RQC Access Request process flow in Service-now.
   2. Status: **Done**
2. **Permissions Removal Form:** 
   1. Description: used **to remove** permissions for an employee to submit internal and/or external requisitions in Lawson. Completion of this form will trigger the RQC Access Removal process flow in Service-now.
   2. Status: **To Do** – Next
3. **Permissions Modification:**
   1. Description: used **to modify** permissions of an existing requestor in Lawson. Completion of this form will trigger the RQC Access Modification process flow in Service-now.
   2. Status: **To Do**

## APP’S BACKEND DATA MODELS

The App’s backend consists of datasets that are extracted daily from Lawson. There are currently five active datasets:

1. Active Accounting Units used to render the user-centric Accounting Units field on the New Permissions form.
2. Grant Activities used to render Activity List field of the New Permissions Form. This field is Accounting Units-centric. Only activities associated to the form user assigned accounting units are listed.
3. Active employees used to render the RQC Requestor field of the New Permissions form. Only active employees are listed – excluding the current user of the form.
4. Active Requestors used to render RQC Requestor field of the Permissions Removal and Permissions Modification forms.
5. Budget Managers and Financial Analysts. Used to validate whether the current user of the form should have access.

The SSIS ETL system is used to extract these datasets from Lawson, transform them into json models, then transfer the models onto the API server which is JAX SharePoint tenant.

These SSIS tasks run daily around 8:30AM ET. The models are updated under the Document Library of the Financial Services Site.

On Failure, an email is sent out to both the developer (Lucie.Hutchins@jax.org) and the SSIS Admin team.

## WHO CAN USE THE RQC ACCESS APP?

To increase productivity, minimize delays due to the approval process, and reduce errors (assigning wrong accounting unit, …), only Budget managers and Financial Analysts can use the App. In addition, a Budget Manager or a Financial Analyst should have at least one active accounting unit associated with them in order to access the forms. Everyone else with get a user-friendly access denied page if they try to access the forms.

However, there is a request for the next release of the App to give access to proxy users. These users act as proxy to Budget managers and Financial Analysts. We still need to work on the specifications. Also keep in mind that some Accounting units do not have either a budget manager, or a financial Analyst associated with them.

## HOW TO ACCESS THE APP

1. Test environment : [jaxspdev.sharepoint.com](file:///Users/hutchl/projects/docs/rqc_access_app/1.%09https:/jaxspdev.sharepoint.com/sites/jaxspdev/SitePages/rqcapp.aspx) – this is a private tenant only selected members have access.
2. Production environment: The app will be accessible [from Lawson Requisition Center](https://jacksonlaboratory.sharepoint.com/sites/FinancialServices/SitePages/Lawson-Requisition-Center.aspx) page starting Thursday August 27, 2020 – Assuming CAB approval next Wednesday, August 26, 2020

## HOW DOES IT WORK?

In the current version of the App, only the New Permissions form is active. The other two, Permissions modification form and Permissions removal form are under implementation.

### THE NEW PERMISSIONS REQUEST FORM

The RQC Requestor Request Form is an intuitive form used to request permissions for an employee to submit internal and/or external requisitions in Lawson. Submission of this form will trigger the RQC Requestor setup process flow in Service-now.

Top of Form

Bottom of Form

The form has the following fields:

1. **RQC Requestor**: required, a single selection dropdown list of active employees - supports live search
2. **Comment**: optional, for additional comment
3. **Request Type**: required, a single selection dropdown list, available options

* External purchases from outside of the lab.
* Internal purchases from the lab store, warehouse, and stockroom.
* Both (Internal and External)
* Template Only (Animal room requestor)

1. **Default Requestor Location**: required, a single selection dropdown list of active locations in Lawson - supports live search
2. **Accounting Units**: required, a multi-select dropdown list of active accounting units assigned to the current user of the form.
3. **Activity List**: optional, a multi-select dropdown list of activities associated with the user’s accounting units.

You can preview your selection by clicking “Next”. The form won’t let you submit if any of the required fields is missing. You can go back and change your selection by clicking the “back” button on the preview page.

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| --- | --- |
| A screenshot of a cell phone  Description automatically generated | A screenshot of a cell phone  Description automatically generated |

## HOW TO REPORT ISSUES AND SUGGESTIONS

* For Software Related Issues, send an email to [lucie.hutchins@jax.org](mailto:lucie.hutchins@jax.org)
* You get “Access denied” even when you meet the requirements: send an email to [purchasing@jax.org](mailto:purchasing@jax.org) cc: [lucie.hutchins@jax.org](mailto:lucie.hutchins@jax.org)
* Suggestions: send an email to [Kristin.collins@jax.org](mailto:Kristin.collins@jax.org) cc: [fis@jax.org](mailto:fis@jax.org) ; [purchasing@jax.org](mailto:purchasing@jax.org)

## WHAT IS NEXT?

1. Implement Proxy Users – someone who can submit requests on behalf of a Budget Manager or a Financial Analyst
2. Implement the RQC Access Removal form
3. Implement the RQC Access Modification form

## KNOWN ISSUES

### OS-Browser Compatibility

1. The App does not work on MacOS with Safari browser

### Problem rendering the App

The App's page renders the following message:

*Something went wrong If the problem persists, contact the site administrator and give them the information in Technical Details.*

Solution:

1. Sign out of the App's page to sign out of Office 365
2. Logout of myjax
3. Close the browser
4. Then try again to access the App's page