

ZYCUS™

iRequest User Manual

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About this Guide

Purpose

This user guide enables iRequest users to get acquainted with the application and use it effectively for the following:

- Raising the request which connect the user to the procurement platforms and other admin activities.
- Tracking all the requests raised on a single platform.
- Customizable forms and workflows for processing the requests.

Audience Profile

The intended audience for this guide are non-procurement users (end users) and the procurement users in the organization.

Manual at a glance

This user guide has been divided into the following chapters:

■ **Chapter 1: Roles Description**

This chapter gives a description of the roles that are configured in iRequest.

■ **Chapter 2: Welcome to iRequest**

This chapter gives an overview of the iRequest application. It also discusses the key features and benefits of the iRequest.

■ **Chapter 3: Getting Started**

This chapter describes how to log on to the application, changing personal details, changing and recovering password and logging out.

■ **Chapter 4: Product flow**

This chapter gives an overview of the product through its product flow.

■ **Chapter 5: Creating a new request**

This chapter guides user to create a new request.

■ **Chapter 6: Processing Requests**

This chapter guides how Requests are processed with and without approval.

■ **Chapter 7: Workbench**

This chapter describes how to handle a Workbench which is a runtime snapshot of all the requests with their details and their individual statuses.

- **Chapter 8: Reports**

This chapter describes the types of reports supported by iRequest.

- **Chapter 9: Product Configuration**

This chapter explains creation of request type and request definition. It also covers configuration of Flexiform and general settings.

Typographical Conventions

Typefaces

The typographical conventions used in this manual are shown in the table below.

This	Represents
<i>Italic</i>	It represents important and useful information in the form of Notes
Bold	This typeface is used to represent screen elements of the iRequest application
CAPS	This typeface is used to represent the keys on the keyboard
Blue text	This indicates a hyperlink
Red text	This indicates a warning

Symbols

This	Represents
	This represents a Warning icon. It includes an important message that should not be ignored

Chapter 1. Roles Description

iRequest defines following roles:

➤ Requestor

End user of an organization who can

- Raises a Request
- Assigns a Request to a Request Manager or a Group

➤ Approver

User with the rights to approve Requests who can Approve\ Reject Requests.

➤ Request Manager

User who has the rights to complete or create a product specific activity.

➤ Super Request Manager

The only user having access to **All Workbench** sub-tab under **Workbench** which displays all the requests. Super Request Manager can perform all actions (Mark Complete, Return and Review) for each request.

➤ Administrator

The product admin configures Request type, its endpoint, the product its processed for and configuring Request Definitions.

- Defining Request types
- Create request definitions

Chapter 2. Welcome to iRequest

Introduction

iRequest is a highly-configurable platform for end-to-end management of requests. It enables streamlining processes & providing visibility to business users. On-screen configurability of process-related fields & approval workflow makes iRequest cut above the rest.

It also provides a workbench for Procurement users to optimally process requests across the entire organization.

Key Features of iRequest

Following are the key features of iRequest:

- iRequest is a platform for procurement and non- procurement users (to connect with procurement users) in the procurement procedure.
- Allows tracking request raised, keeps track and status update.
- Completely configurable tool with flexible workflow
- Customizable Flexiform and Workflow

Benefits of iRequest

Following are the benefits of iRequest:

- Single platform to manage the life-cycle of almost any process
- Easily configurable forms & workflows
- Easy-to-use request creation & tracking screens with contextual help for maximum adoption
- In-built integration capability with the Zycus Suite as well as hooks to exchange data with external systems.

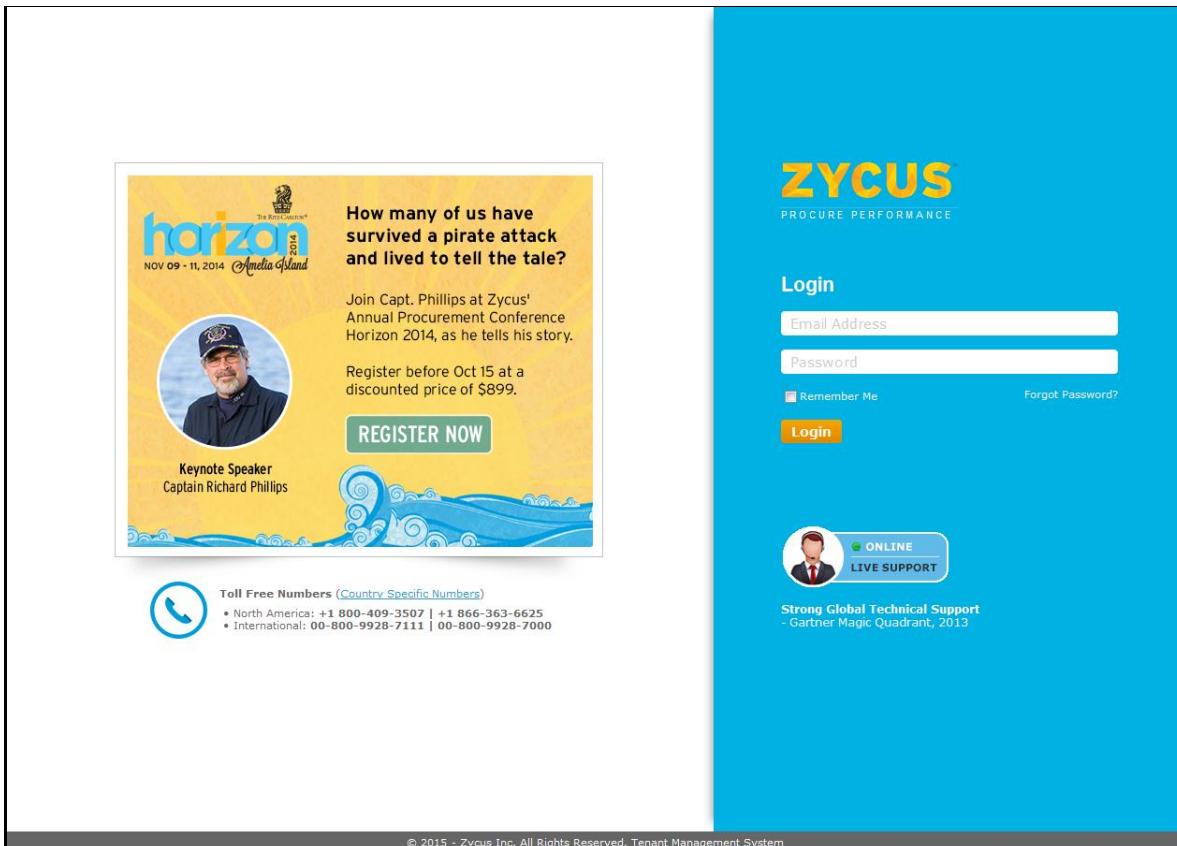
Chapter 3. Getting Started

Accessing iRequest

3.1.1 Logging into iRequest

1. Open the Internet browser, enter the product URL in the Address bar and press Enter.

NOTE: The URL is specific to your company name and is provided by Zycus.



2. Enter user's login credentials and click **Sign In**.
3. On the product selection page, click **iRequest**.

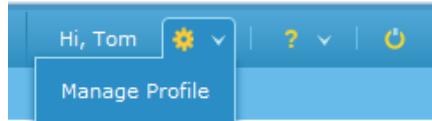


NOTE: The Product Selection link in the menu section enables users to seamlessly switch between products in the Zycus Product Suite.

3.1.2 Modifying Personal Details

Modify personal details on the **Manage Profile** page.

1. Logon to the iRequest application.
2. Click setting button located at the upper-left corner of the page, click the **Manage Profile** as shown below.



The Manage Profile page displayed has three sections:

3. User Details - User can set display name and change password.

NOTE: The Mobile PIN feature is user specific and it should be active.

4. Location Details - User can set location details which includes **Location name**, **City**, **State** and **Telephone number**
5. Preference Details - User can set preferences for Time Zone, Number Format, Date Format, Time Format, Currency, Locale and Decimal Precision
6. Click **Save and Close** to apply changes.

3.1.3 Changing Password

To change your password:

1. Click setting button located at the upper-left corner of the page, click the **Manage Profile** as shown below.
2. Under User Details, click **Change Password**.

Change Password

Password : Minimum length 8 and Maximum length 32 characters.

Current Password :

New Password : **Password Strength**

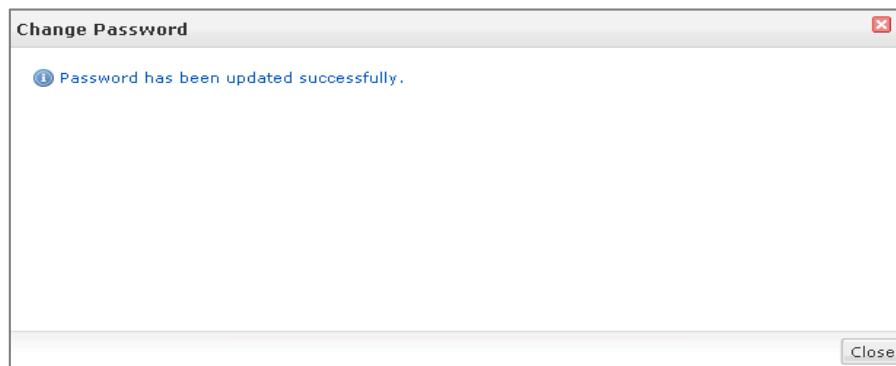
Confirm Password :

Change Password **Close**

3. Enter **Current Password** and the **New Password** in the respective fields.

NOTE: Password must contain minimum eight characters.

4. Click **Change Password**. iRequest displays the following confirmation message.



3.1.4 Recovering Password

To recover password:

1. On the login page, click **Forgot Password?** The Forgot Password page is displayed.

The screenshot shows the ZYCUS Procure Performance login interface. At the top is the ZYCUS logo. Below it is a 'Login' section containing two input fields: one for 'Email Address' containing 'Tom.williamson@zycus.com' and another for 'Password'. To the right of the password field is a 'Remember Me' checkbox followed by a 'Forgot Password?' link, which is enclosed in a red rectangular box. At the bottom of the login form is an orange 'Login' button.

The screenshot shows the ZYCUS 'Forgot Password?' page. It features a large 'Forgot Password?' heading. Below it is an 'Email Address' input field. Underneath is a CAPTCHA input field containing the code '1W6C8', with a refresh icon to its right. Below the CAPTCHA is a text box labeled 'Please enter the above captcha'. At the bottom of the page are two buttons: an orange 'Submit' button and a 'Cancel' button.

2. Enter **Email Address** and the code displayed in the lower text-box and click **Submit**. An email is sent to the email account with the login credentials.

NOTE: Click  to refresh the code.

3.1.5 Logging Out of iRequest

1. Click Logout button located at the upper-right corner of the window to logout of iRequest.



NOTE: iRequest has a configurable time out period. User is automatically logged out from iRequest if the application is idle for the configured time out period and all the unsaved data will be lost. (For e.g. if the time out period is configured to 60 minutes, the application will logout the user automatically without saving the change)

After configured time out period (60 minutes) has elapsed, iRequest displays the following **Session Time-out Warning**. This warning message provides options to **Extend Session** or eventually log out.



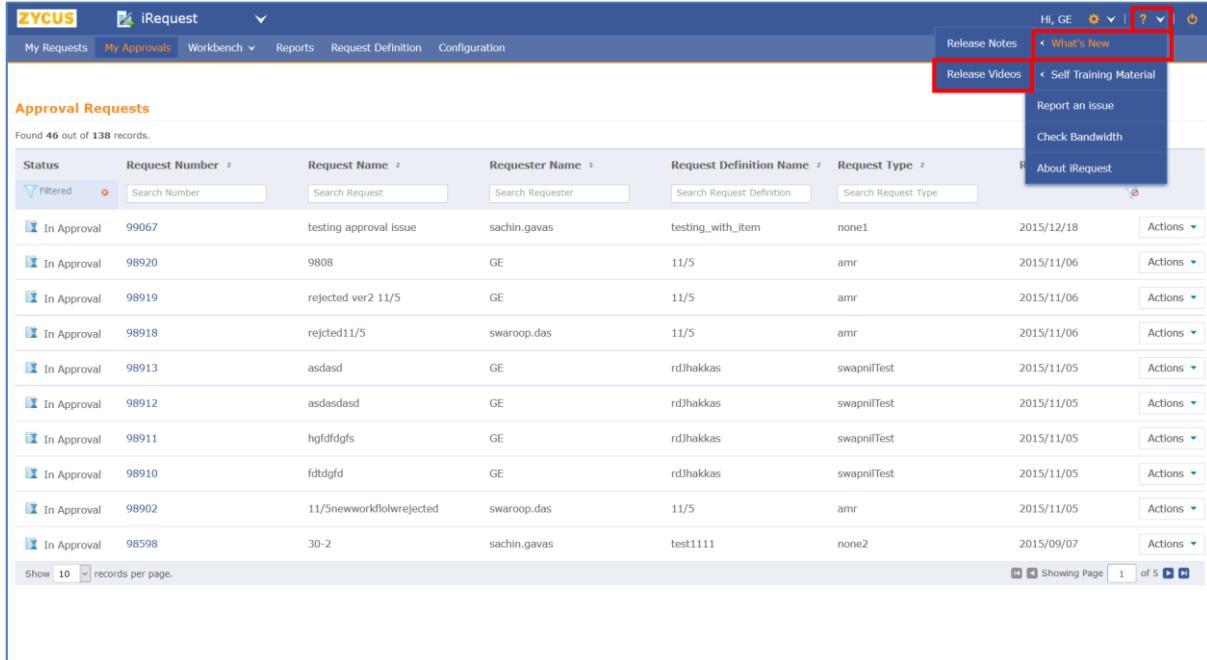
3.2 Help

This feature is provided for user assistance to understand and use iRequest. The Help option provides access to the User Manuals for iRequest giving a step by step explanation of all the functionalities.

Accessing help option:

1. Click the  icon on the right hand top corner.

Help Menu > What's New > Release Videos



The screenshot shows the iRequest application interface. At the top, there is a navigation bar with links for 'My Requests', 'My Approvals', 'Workbench', 'Reports', 'Request Definition', and 'Configuration'. On the far right of the header, there is a user profile section with 'Hi, GE' and a help icon (a question mark in a blue box). A dropdown menu is open from the help icon, listing options: 'Release Notes', 'What's New' (which is highlighted with a red box), 'Release Videos' (also highlighted with a red box), 'Self Training Material', 'Report an issue', 'Check Bandwidth', and 'About iRequest'. Below the header, the main content area displays a table titled 'Approval Requests'. The table has columns for 'Status', 'Request Number', 'Request Name', 'Requester Name', 'Request Definition Name', 'Request Type', and 'Last Modified'. There are 46 records found out of 138. The table includes search and filter fields at the top and pagination controls at the bottom.

2. User Manual – A detailed explanation on how to use different features on the iRequest tool.

Help Menu > Self Training Material > User Manual

3. Online Help – A search engine to find your queries about iRequest.

Help Menu > Self Training Material > Online Help

The screenshot shows the iRequest application's user interface. At the top, there's a navigation bar with links for 'My Requests', 'My Approvals', 'Workbench', 'Reports', 'Request Definition', and 'Configuration'. On the far right of the header, there's a dropdown for 'Hi, GE' and a help icon. A context menu is open, with 'User Manual' highlighted by a red box. Other options in the menu include 'Online Help', 'Self Training Material', 'Report an issue', 'Check Bandwidth', and 'About iRequest'. Below the header, the main content area is titled 'Approval Requests' and shows a table of 46 records. The table has columns for Status, Request Number, Request Name, Requester Name, Request Definition Name, Request Type, and Date. Each row contains a set of buttons for actions like 'Actions'. At the bottom of the table, there's a 'Show' dropdown set to 10 records per page and a page navigation bar.

- If in case, user faces any issue regarding any of the iRequest functionality; click **Report an Issue** to log the issue. The functionality issue can be categorized by the user under **Message Type** in the Report an Issue window.

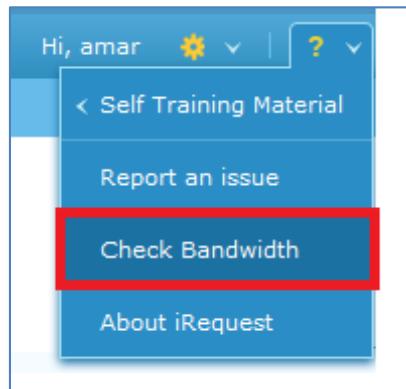
The screenshot shows the 'Report an Issue' dialog box. It has several input fields with validation asterisks (*): 'Module' (set to 'My Requests'), 'Summary' (containing 'Error in raising a request'), 'Message Type' (set to 'Functionality Issue'), and 'Priority' (set to 'Medium'). There's also a large text area for 'Description' which contains the text 'While raising a request, iRequest shows processing error.' At the bottom, there's a section for 'Add Attachments' with a 'Select File' button and a note about the maximum file size (5 MB). On the far right of the dialog are 'Submit' and 'Close' buttons.

5. User can select from below options for fields provide with drop down lists for Reporting an issue:

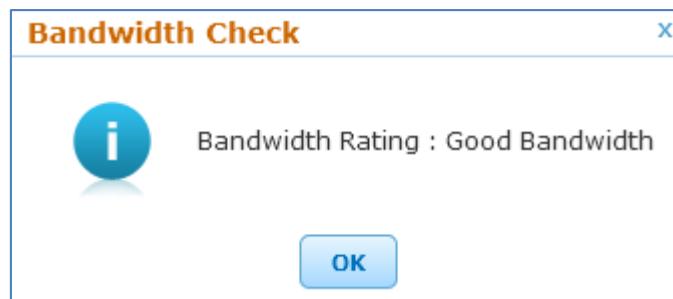
Field	Options
Module	<ul style="list-style-type: none"> 1. My Requests 2. My Approvals 3. My Workbench 4. Administration 5. Reports
Message Type	<ul style="list-style-type: none"> 1. Feedback 2. Functionality Issue 3. Usability Issue 4. Performance Issue 5. Other
Priority	<ul style="list-style-type: none"> 1. High 2. Medium 3. Low

3.3 Bandwidth Test

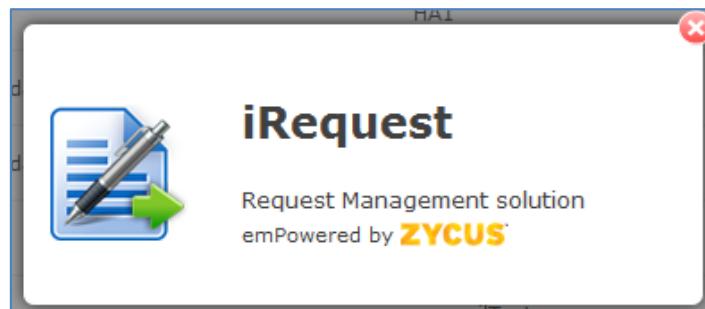
- The Bandwidth Test assists user to check if their internet bandwidth is sufficient for optimum performance of the application.



- Click icon and click **Bandwidth Test** to check the bandwidth of the internet connection. The internet bandwidth rating is displayed as Good / Bad.

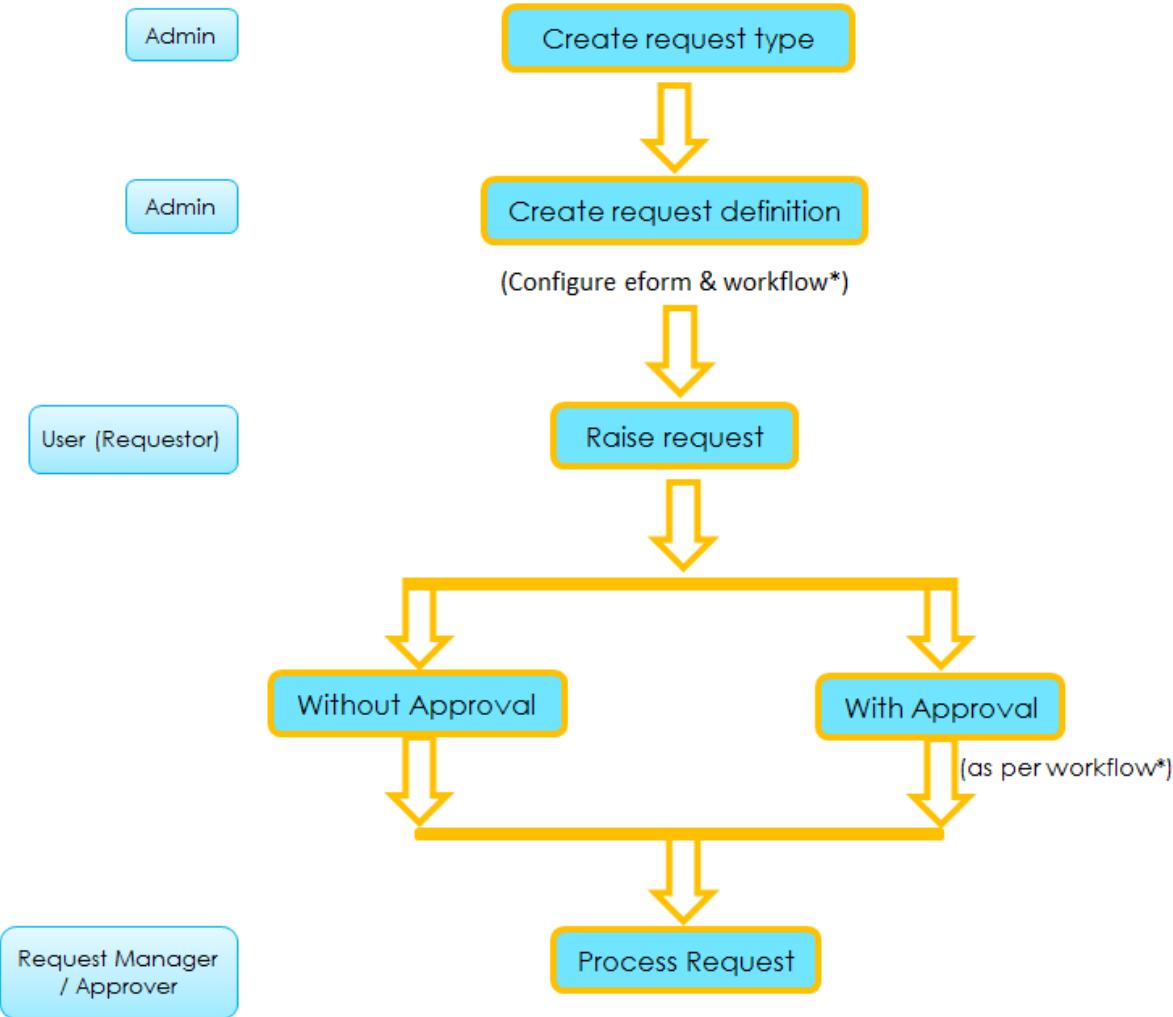


- The bandwidth grades are as follows:
 - Low - less than equal 1 mbps (megabits per second)
 - Average - 2-5 mbps
 - Good - greater than 5 mbps
- Click **About iRequest** to view the current version of iRequest as shown below:



Chapter 4: Product flow

This section describes the entire product flow for iRequest. Product flow for iRequest is depicted below:



During the initial product setup, Admin creates request type followed by creation of request definition. Creation of request definition includes configuring Flexiform and Workflow.

The Requestor raises the request with appropriate request definition. To raise a request, request type for request definition is a must to be associated.

The request raised goes to the Request Manager either without approval or goes through the approval chain as configured in the workflow.

The approved request is further processed by the Request Manager. The Request Manager enters comments marking the process as complete.

Chapter 5: Creating a new Request

A Requestor raises all the requests and assigns them to the Request manager or a group as per the configured workflow.

Status	Request Number	Request Name	Request Definition Name	Request Type	Submitted On	Actions
Draft	99514	req1	demo1_416	none1	-	Action
Draft	99513	rq12344	FPT2	none1	-	Action
Draft	99512	FPTRQ1	FPT2	none1	-	Action
With RM	99511	req2	bnnbn	none1	2016/04/27	Action
With RM	99510	rq1	bnnbn	none1	2016/04/27	Action
With RM	99509	Print and save test	bnnbn	none1	2016/04/26	Action
With RM	99506	contract req	contr	iContract	2016/04/25	Action
Draft	99498	gtgt	auditTest1	none1	-	Action
With RM	99497	audit testing 1	auditTest1	none1	2016/04/23	Action
Returned	99496	audit test321	audit3	none1	2016/04/23	Action

Show 10 records per page. Showing Page 1 of 23

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Using requestor's credentials login to iRequest. Click **My Requests** and then click **+ New Request**.

The **Select Request Definition** window displays the
Request Type (Sourcing, Contract, or iManage Requests)
Request Definition

Select Request Definition

Sourcing Requests

Request For Information

Auction Requests

OK **Cancel**

Select the appropriate **Request Definition** and click **OK**. Following page will be displayed:

NOTE: The icon depicts that the Custom Field has a Description defined for it.

Enter the **Request Name** and enter the corresponding **Request Description**.

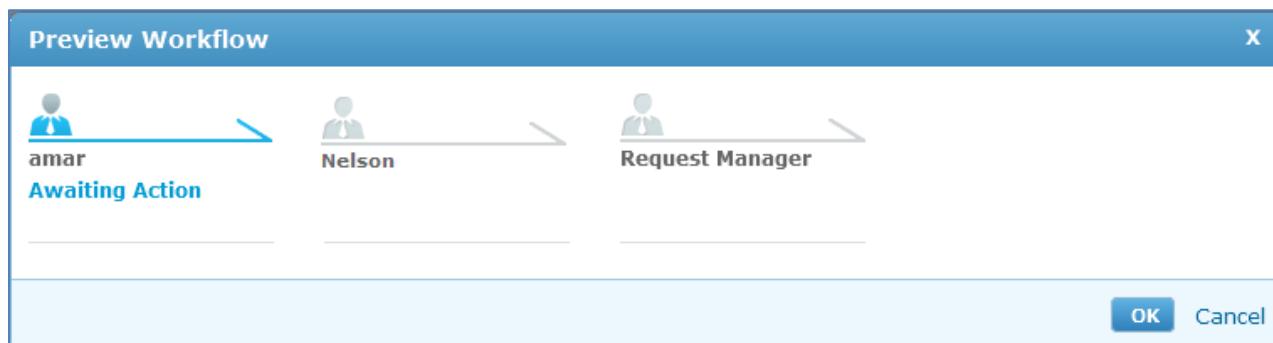
Select the Request Manager from the **Assigned to** drop down list. The request can be assigned to a single user (Request Manager) or a group.

Request type is displayed as per the selection while raising the request.

Select the **Urgent Requirement** check box if the request to be raised is urgent. The request marked as urgent is reflected with a red exclamation mark under **My Requests**.

Click **Add Attachments** to add any document required for request to be raised. Click **Submit** to raise the request with details provided above.

iRequest displays Preview Workflow for the Request to be submitted as shown below.



iRequest lists the requests under My Requests page (depending on the workflow configuration) for the Request Manager as shown below.

Found 4 records.

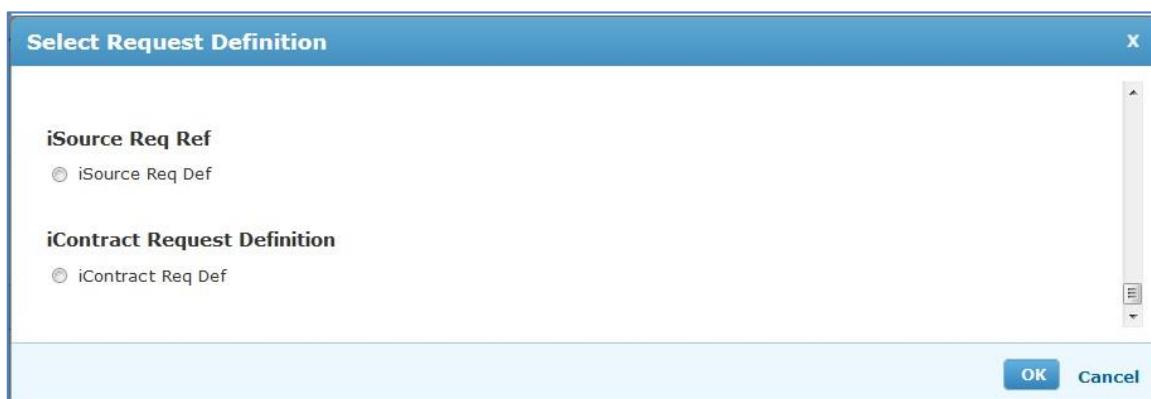
Status	Request Number	Request Name	Request Type	Submitted On	Actions
Completed 9		AC rmainenance	Sourcing	01/20/2015	Actions ▾
With RM 8		Switches	Sourcing	01/15/2015	Actions ▾
Returned 4		steve	Sourcing	01/14/2015	Actions ▾
Completed 5		request for sourcing	Sourcing	01/14/2015	Actions ▾

Show 10 records per page. Showing Page 1 of 1

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5.1 Sourcing Request

- Select the iSource related request definition from the popup and click on OK.



- You will be redirected to following page:

Sourcing type

Request Name*: Office Stationary

Request Description:

Request Type: sourcing

Attachments: [Add Attachments](#)

Urgent Requirement:

Assigned To: amar.tms

Item Table

Item Name*	Item Number*	Price Type*	Quantity*	Unit of Measures*
Stationary	1		50	bulk

Show 10 entries

Currency

Event Currency*: GBP

General Information

Company Name: Gotham Oil Pvt. Ltd

Certified Supplier: Lenovo

Items Required: Pen, Marker, Printer

Submit Save as Draft | Preview Workflow | Cancel

3. You can notice the **Request Type** as **iSource** in the web form.
4. Select the BU Hierarchy (Business Unit), Region-Country, SAP Company Code and Major Commodity from their respective drop down lists.

Note: User can search the values by entering few characters or just select from the dropdown values available.

5. The **Dropdown** and **Multi-select** menu will allow adding and removing the options by typing them in the search box.

Company Name: Gotham Oil Pvt. Ltd

Certified Supplier: Lenovo

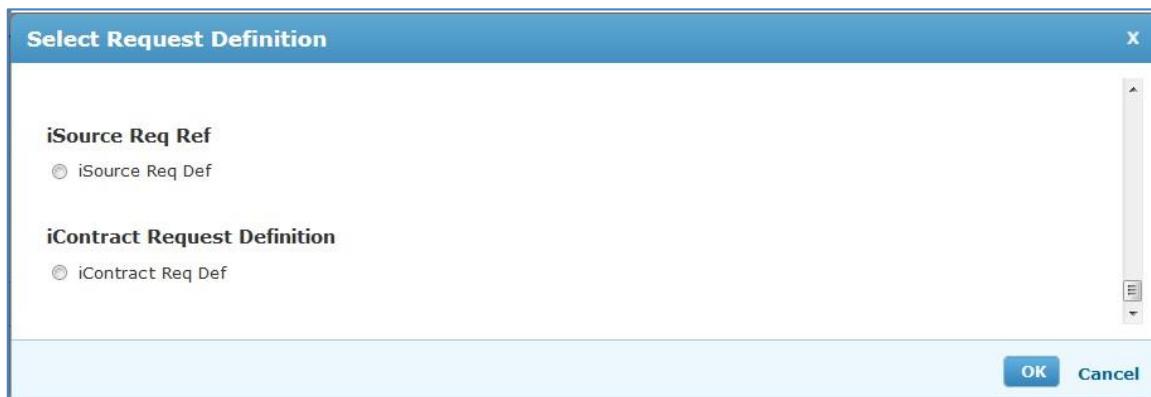
Items Required:

Pen X Marker X Printer X White Board X

6. You can remove a selected element by click the X mark against that element.
7. Enter all the Line Item details in the Line Items panel.
8. Fill in all the details and click on **Submit**. The request will be listed on you **My Requests** page.

5.2 Contracts Request

1. Select iContract related request definition from the popup and click on OK.

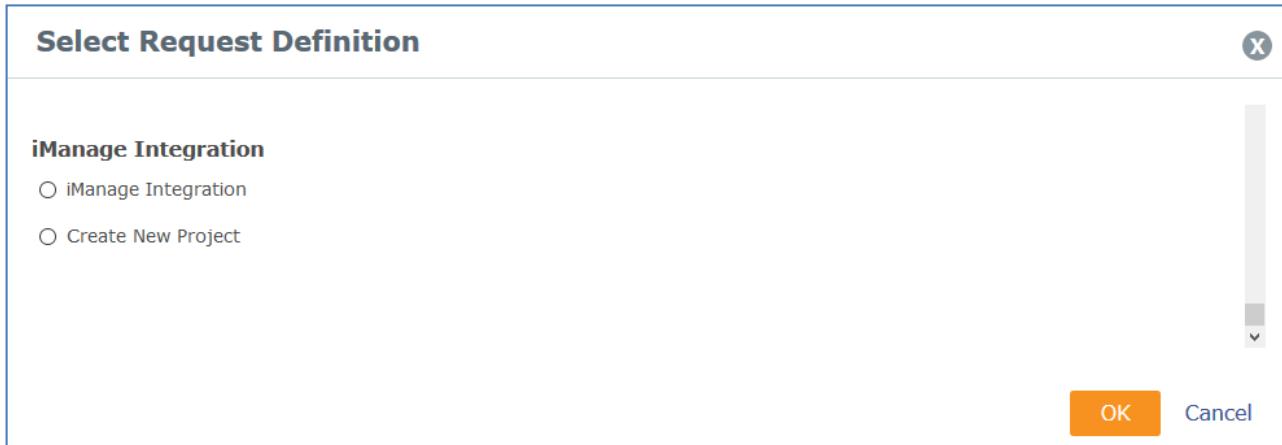


2. You will be redirected to following page:

3. You can notice the **Request Type** as **iContract** in the web form.
4. Fill in all the details and click on **Submit**. The request will be listed on you **My Requests** page.

5.2 iManage Request

Select iManage related request definition from the popup and click on OK.



You will be redirected to following page:

iManage Integration

Request Name*: : Project Creation for IT Hardware

Request Type: **iManage Integration**

Request Description:

Assigned To*: Ushma

iManage Project Details

Project Name*: IT Hardware

Project Type*: Quick

Project Description: Strategic

Project Start Date: 01/11/2016

Project End Date: 30/11/2016

Submit | Save as Draft | Preview Workflow | Cancel

You can notice the **Request Type** as **iManage** in the web form.

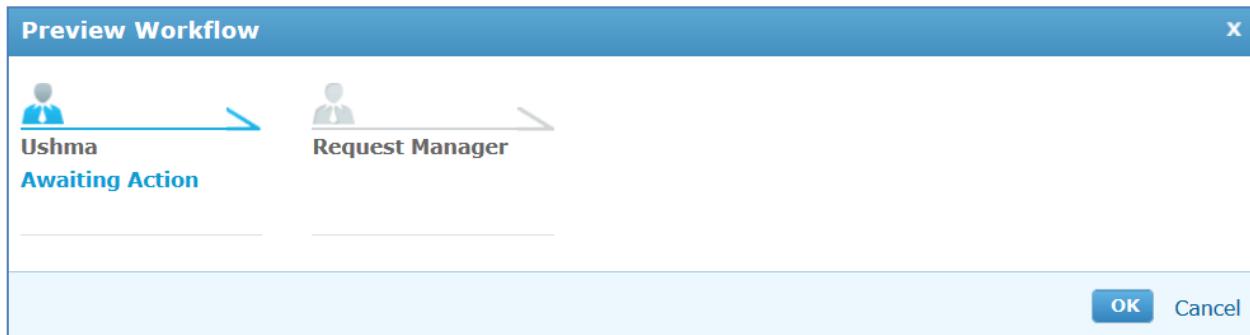
Enter a Request Name and Description.

In the **Assigned To**: section, select a user by clicking the drop down menu. This request will be assigned for approval to the user selected in this step.

Go to the next section, fill in the remaining details.

The fields visible in this section will be iManage specific and configured by your company admin.

Click on **Submit**. The workflow will be previewed by default.



The request will be listed on your **My Requests** page.

Click **Save as Draft** to save the request as draft. Click **Preview Workflow** to understand how this request will be processed.

Creating project in iManage by raising a request in iRequest

iManage users will be able to assign tasks by raising a request through iRequest. Let's take an example to understand more about this feature.

Consider a scenario where the project manager wants to contract a supplier for goods and services.

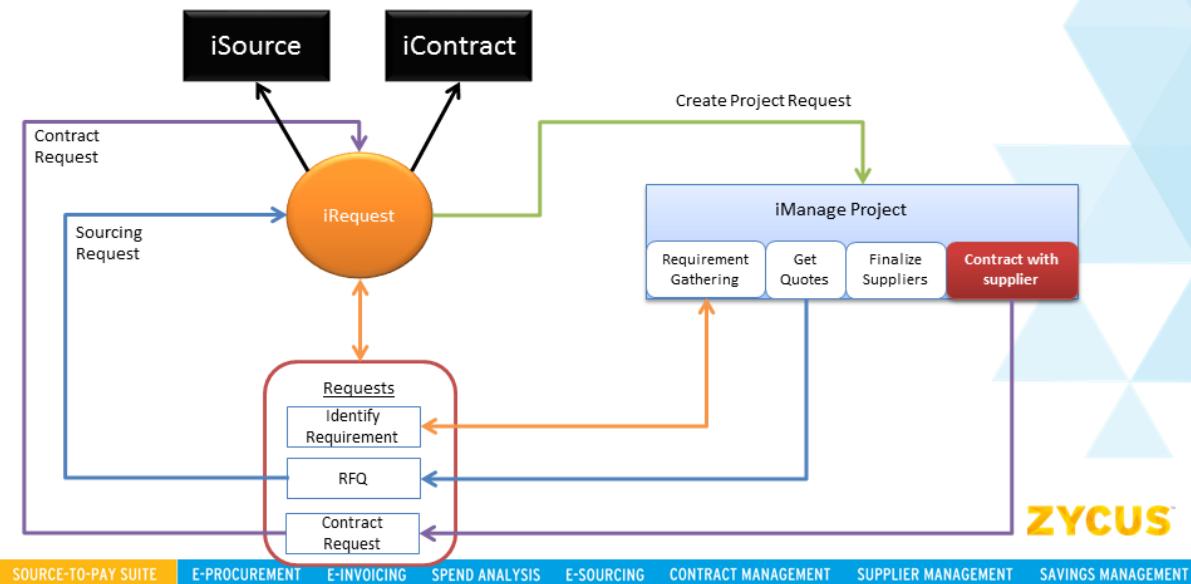
The project manager will initiate a project which has the following tasks:

- Requirement gathering
- Get supplier quotes
- Finalize supplier
- Contract with supplier

Consider that in this case the project manager does not have the required access to get into the sourcing or contracting activities. Also consider that the sourcing manager may not have access to iManage module.

- To kick off the project, the project manager will execute the first task (Requirement gathering) by creating a request in iRequest and then link this request to the task in iManage.
- Once the requirement is identified, project manager can initiate the identifying the quotes by raising a request against the task (Get supplier quotes) and then link it to an RFQ in iSource. The request will be a sourcing request handled by the sourcing manager in iSource.
- Post the identification of quotes, project manager can finalize the suppliers based the information available.
- Further to sign a contract, project manager can initiate the contracting activity by raising a request against the task (Contract with supplier) and then link it to a Contract in iContract. The request will be a Contract request handled by the Contract manager in iContract.

Approach



Note: This functionality will allow project managers to streamline process of assigning requests.

Note: To have a deeper understanding and to see how this works in action, please refer the iManage user guide.

Chapter 6: Request approvals

Request Manager Role processes the request assigned by the requestor.

Status	Request Number	Request Name	Requester Name	Request Definition Name	Request Type	Received on	Actions
In Approval	99067	testing approval issue	sachin.gavas	testing_with_item	none1	2015/12/18	Actions
In Approval	98598	30-2	sachin.gavas	test1111	none2	2015/09/07	Actions
In Approval	98597	20-3	sachin.gavas	test1111	none2	2015/09/07	Actions
In Approval	98596	test 20-2	sachin.gavas	test1111	none2	2015/09/07	Actions
In Approval	98595	test 10	sachin.gavas	test1111	none2	2015/09/07	Actions
In Approval	98594	test 1	sachin.gavas	test1111	none2	2015/09/07	Actions
In Approval	98593	test 3	sachin.gavas	test1111	none2	2015/09/07	Actions
In Approval	98592	test2	sachin.gavas	test1111	none2	2015/09/07	Actions
In Approval	98591	test1	sachin.gavas	test1111	none2	2015/09/07	Actions
In Approval	98517	df	sachin.gavas	test1111	none2	2015/08/28	Actions

Show 10 records per page. Showing Page 1 of 2

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Note: Any request raised by a supplier through Zycus Supplier Network (ZSN) will be visible on this page for approval.

6.1 Processing Requests without approval

This section explains processing of the requests without approval. The request definition of these request are not configured with a workflow.

Click **Actions** against the appropriate request entry under **All Requests**.

Assigned to	Received on	Actions
Harvey	10/28/2014	Actions
Harvey	10/24/2014	
Harvey	10/24/2014	
Harvey	10/20/2014	Actions

Mark Complete
Return
Review

Showing Page 1 of 1

Click **Mark Complete** to further process the selected request. Then click **Process > Process Request** window is displayed as shown below.

Process Request

Comments *:
The request is processed.

Process **Cancel**

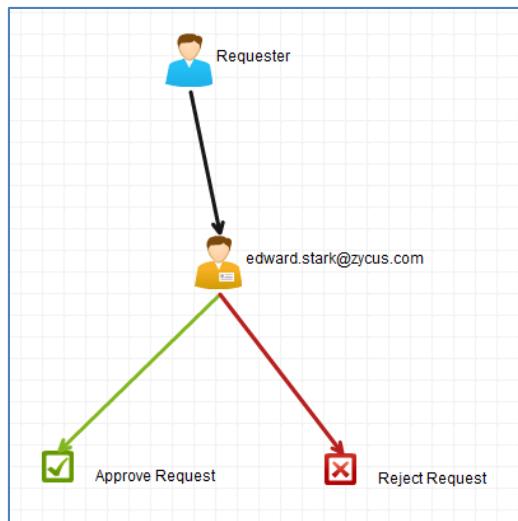
The **Status** changes from **With RM** to **Completed** as shown below.

Status	Request Number	Request Name
Completed	1	Hardware Price List

6.2 Processing Requests with approval

This section explains processing of the requests with approval. The request definition of these request are configured with a workflow. For more details for Request definition refer [9.2 Creating Request](#) Definition and for workflow refer [10.2 Configuring Workflow](#).

Consider the sample workflow below:

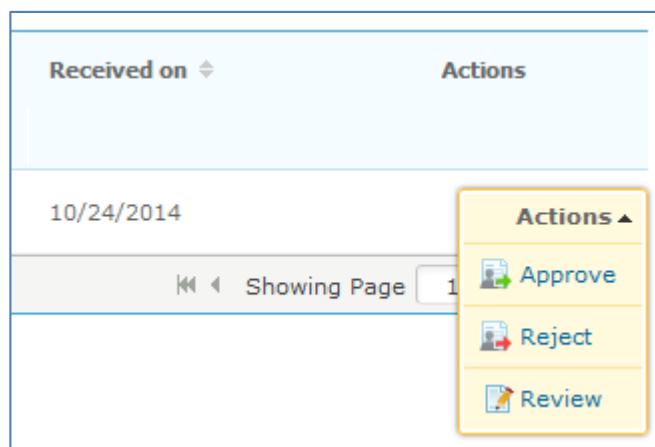


The requester raises the request with its request type definition.

The request as per the workflow is sent to the approver (edward.stark@zycus.com) for approval. The workflow can be designed with multiple such approval steps, being processed by all the consecutive approvers.

Below are the steps followed by the Approver/s for processing request.

Under the **My Approvals** tab, Click **Actions** against the appropriate request entry under **My Approvals**.



Click **Approve** / **Reject** as required. Click **Review** to add comments and then click **Approve** or **Reject**. iRequest displays the following page to review the request.

Shareware price list		« Back	
Request Number:	4	Request Definition:	Software Price List
Request Description:	-	Request Type:	Administrative
Assigned To:	Harvey	Urgent Requirement:	No
Attachment(s):	-		
Audit Trail <hr/> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">Comments *:</div> <div style="text-align: center;"> <input style="background-color: #0070C0; color: white; border-radius: 5px; padding: 5px 20px; border: none; font-weight: bold; margin-right: 10px;" type="button" value="✓ Approve"/> <input style="background-color: #E91E63; color: white; border-radius: 5px; padding: 5px 20px; border: none; font-weight: bold;" type="button" value="✗ Reject"/> </div>			

The **Status** changes from **With RM** to **Completed** as shown below.

At every step, the actor (user, depicted in the workflow) either approves or rejects the request.

- If the actor approves the request, the request is further processed to the next actor in the workflow.
- If the actor rejects the request, the status under **My Requests** is updated accordingly. iRequest allows the request to be processed further even after rejection at a single node.

If the request reaches at **Reject Request** at the end of the workflow, the requestor then can either direct the request to another Request Manager or raise a new request.

NOTE: Audit Trail under the requests helps all stakeholders to understand which actor has rejected the request. While rejecting the request the corresponding approver enters the comment. This comment helps the Requestor understand the reason for rejection. Accordingly the Requestor can raise a new request or direct that request to another Request Manager.

Once the request is completely approved at the end of the workflow, it is directed to the **End Point** defined while creating the request type.

Chapter 7: Workbench

The workbench section is divided into My Workbench for Request Manager and All Workbench for Super Request Manager.

7.1 My Workbench

The workbench is the work environment for the Request Manager. It displays all the requests with the following details against each request record:

- Status
- User can filter from the Statuses for the requests. The filter options are:
 - With RM
 - In Progress
 - Returned
 - Completed
- Request Number
- Request Name
- Requester Name
- Request Type
- Assigned To
- Received on
- Actions

My Workbench provides **View** option under Actions. The option **View** in addition to the basic request details displays Item table (created in Flexiform), **Audit Trail** and the **Linked Objects**.

Status	Request Number	Request Name	Requester Name	Request Definition Name	Request Type	Assigned To	Received on	Actions
In Progress	98792	Test Contract FLow	swaroop.das	iContract - Sid2	iContract	Its AAAAA group1	2015/10/23	View
With RM	98781	iContract - Sid22	swaroop.das	iContract - Sid2	iContract	Its AAAAA group1	2015/10/22	View
In Progress	98779	iContract - Sid2	swaroop.das	iContract - Sid2	iContract	Its AAAAA group1	2015/10/22	View
In Progress	98776	iContract - Sid	swaroop.das	iContract - Sid	iContract	Its AAAAA group1	2015/10/22	View

Note: Request raised by suppliers will be available on this page to take further actions by the RM.

Click the **Request Number** to view the details.

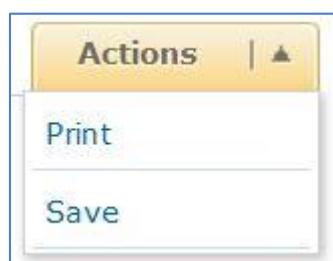
The screenshot shows a detailed view of a request for a "water purifier". Key fields include:

- Request Number:** 99237
- Request Definition:** contract request definition
- Request Type:** contract
- Assigned To:** sachin gawas
- Urgent Requirement:** No
- Price List:** A table showing current prices for various items.
- Item Table:** A table showing item details like Item Name, Item Number, Price Type, Quantity, Supplier Name, Target Price, Unit of Measures, and Item Attachment.
- Workflow:** Shows the status as "Submitted" and "Awaiting Action".
- Audit Trail:** Shows a single entry for "Request Submitted" by "인증 인증 날짜" on "19/02/2016 09:12:37 PM".

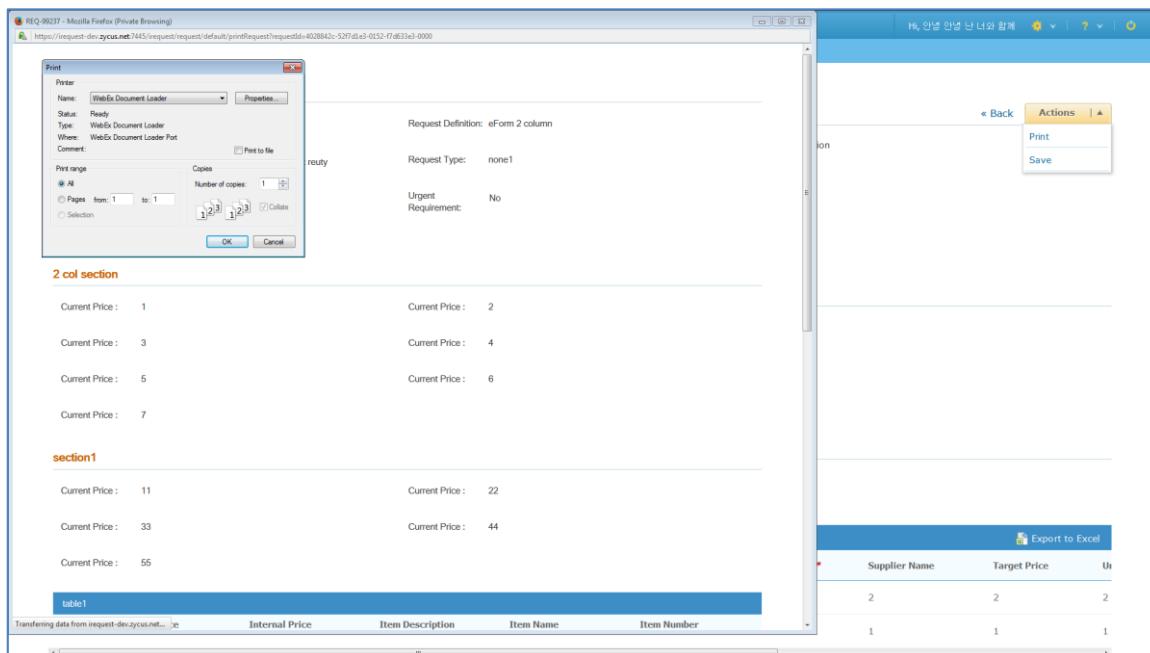
An "Actions" menu at the top right offers "Print" and "Save" options.

Click **Export to Excel** to download the item table template. User can populate this template to upload items in bulk into the Item table using **Import from Excel** functionality.

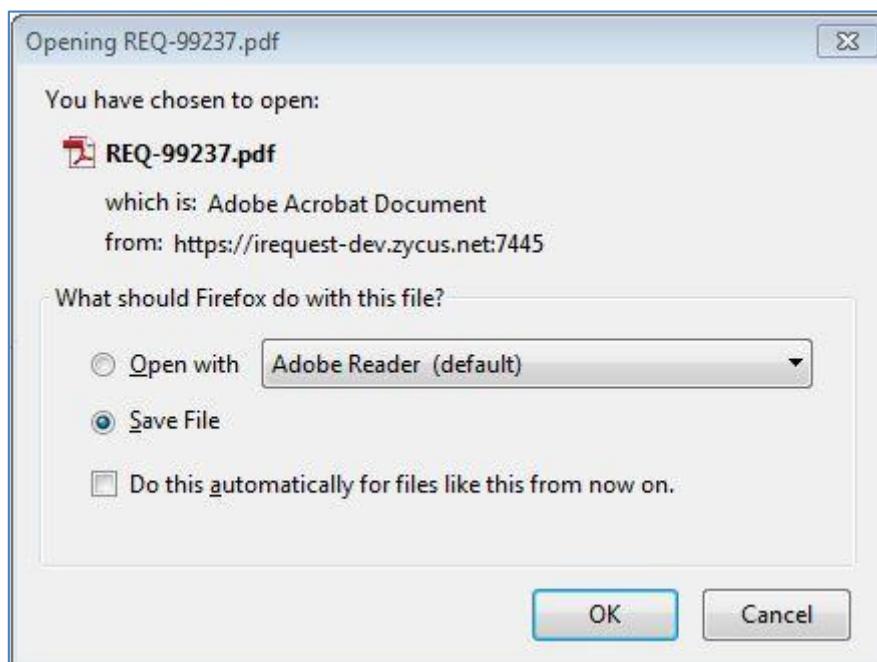
Click the **Actions** menu on top right corner. You will have an option of **Print** and **Save**.



When you click on **Print**, print dialog box will appear in new browser tab.



Click **Save**. You will get a download popup. You can save the RFx details in pdf format on your system.



Click **Audit Trail** to view details of the request versions.

Audit Trail				
Actions	User	Version	Date	Comments
Approved	Edward	1	10/28/2014	Approved
Awaiting Approval	Steve	1	10/28/2014	

The Audit Trail displays all the versions of the requests as per the different statuses with corresponding date and the user associated with action.

7.2 All Workbench

All Workbench displays all the requests for the Super Request Manager (RM). Super RM has access to all the requests and can process any request.

Status	Request Number	Request Name	Requester Name	Request Definition Name	Request Type	Assigned To	Received on	Actions
	99552	attachment test	VaibhavSampat	attachment	End-point none	-	2017/04/18	Actions
	99508	fgh	sachin.gavas	punit_rd17	punit_rt2	-	2016/04/26	Actions
	99507	punit_req_rd44	sachin.gavas	punit_rd44	punit_rt1	sachin.gavas	2016/04/26	Actions
	99367	KM2016	swaroop.das	Finally Complete	iContract	-	2016/03/16	Actions

Note: Request raised by suppliers will be available on this page to take further actions by the Super RM.

For requests, the Super RM can perform following actions:

- Mark Complete
- Return
- Review

7.3 Create Sourcing Events

Under **Workbench**, click the request number of a request to create a sourcing event. You can search for the Request Number using Status and Assigned To filters. You can also search using Request Number, Request Name, Requestor Name and Request Type fields.

The screenshot shows the iRequest Workbench interface. At the top, there are tabs for 'My Requests', 'My Approvals', 'Workbench' (which is selected), 'Reports', 'Request Definition', and 'Configuration'. Below the tabs, there are two buttons: 'My Workbench' and 'All Workbench'. The main content area has a title 'Hardware Prices'. It displays the following details:

- Request Number: 120
- Request Definition: IT/Hardware
- Request Description: (empty)
- Request Type: Sourcing
- Assigned To: James
- Urgent Requirement: No
- Attachment(s): 3 attachments

Below this is a 'Price List' section with a table titled 'Item Table' containing the following data:

Item Name*	Internal Price	Supplier Name	Quantity*	Item Number*	Price Type*	Current Price	Unit of Measures*	Target Price
Laptop	35,000	Dell	20	201	UNIT	45,000	Unit	40,000
Speakers	5,000	Onkyo	300	202	UNIT	6,000	Pack	5,500
Hard Disk	12	Seagate	12	12	BULK	12	12	12

At the bottom of the page, there are links for 'Linked Documents' and 'Workflow', and a section for 'Audit Trail'.

1. Click **Create Sourcing Activity** to initiate event creation.

Create New Sourcing Event

Event Type*: RFQ

Name*: IT Price List

Event Owner*: James

Description :

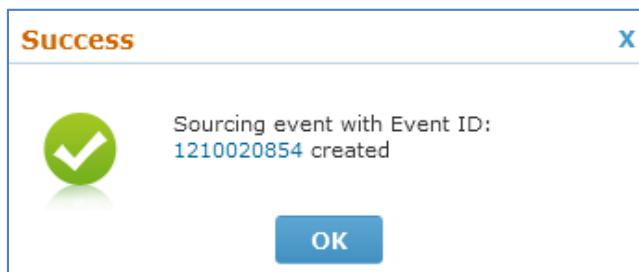
Hardware Item Table

Item Name	Internal Price	Supplier Name	Quantity	Item Number	Price Type	Current Price	Unit of Measures	Target Price
Laptop	50,000	Dell	20	201	UNIT	45,000	Unit	40,000
Speakers	5,000	Onkyo	300	202	UNIT	6,000	Pack	5,500
Network Cable	500	Denolex	500	203	BULK	150	Meters	550

Showing Page 1 of 1

Create Event Cancel

2. Select the **Item(s)** to be sourced and click **Create Event**.
3. iRequest displays the confirmation window with the event ID as shown below:



4. This **Event ID** is hyperlinked to **My Events** in iSource. Click **OK** to continue in iRequest or click on the **Event ID** to enter event details in iSource as shown below.

My Events

Found 1 records.

Event ID	Event Title	Type	Status	Owner	Stages	Conclusion	Actions
1210020854	iReq: IT Price List	RFQ	Draft/In Progress	MVL Divya	Draft > Conduct > Negotiate > Analyze	Award	Action

Show 10 records per page

Stage Legend: ▶ Completed ▶ In Progress ▶ Pending

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7.4 Create Contract

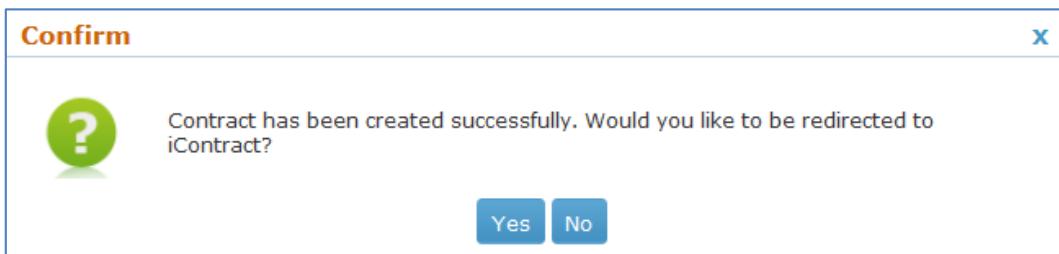
- Under **Workbench**, click the request number of a request to create a contracting event. You can search for the Request Number using Status and Assigned To filters. You can also search using Request Number, Request Name, Requestor Name and Request Type fields

The screenshot shows the 'Workbench' tab selected in the top navigation bar. The main content area displays a form for creating a new contract. The 'Category' section includes fields for Type and Subtype (Business-Agreement), Contract Category (IT Hardware/software), and Contract Expiration Date (2015/11/03). The 'Item Table' section contains a table with several rows of items, each with columns for Current Price, Item Name, Item Number, Item Description, Target Price, Internal Price, Quantity, Unit of Measures, Price Type, and Supplier ID. A specific row for item 345345 is highlighted.

- You will be redirected to the following page:

The screenshot shows the 'Workbench' tab selected in the top navigation bar. The main content area displays a completed contract record titled 'contract_req1'. The 'Workflow' section shows a history of actions: 'Submitted' on 28/10/2015 at 12:32:55 AM, followed by 'Request Manager - awaiting Action'. The 'Audit Trail' section shows a detailed history of activities, including 'Activity created for the Request', 'Request Saved', and 'Request Submitted', all performed by the user '한글 한글 난 난 외 함께' on 28/10/2015.

- Select the contract owner and click on **Create Contract**.
- You will get following popup:



5. Click yes, you will be redirected to **iContract**

6. You can fill up the details and start authoring the contract and take it up till signing off stage.

7. Select the required fields and click on **Start Authoring**.

7.5 Create Projects in iManage

1. Under **Workbench**, click the request number to view the request.
2. You can classify a request as iManage based on the **Request Type** name.
3. You can search for the **Request Number** using **Status** and **Assigned To** filters. You can also search using **Request Number**, **Request Name**, **Requestor Name** and **Request Type** fields.
4. You will be redirected to the following page:

The screenshot shows the iRequest Workbench interface. At the top, there are tabs for 'My Requests', 'My Approvals', 'Workbench' (which is selected), 'Request Definition', and 'Configuration'. Below the tabs, there are buttons for 'My Workbench' and 'All Workbench'. The main content area has two sections: 'Strategic Project Creation for IT Hardware' and 'iManage Project Details'. In the first section, there are fields for Request Number (1316), Request Description (empty), Request Definition (iManage Integration), Request Type (iManage Integration), Attachments (empty), Assigned To (Ushma), and Urgent Requirement (unchecked). In the second section, there are fields for Project Name (IT Hardware), Project Type (Strategic), Project Description (empty), and Project Start Date (01/11/2016). At the bottom, there are buttons for 'Mark Complete', 'Create iManage Activity', 'Return To Requester', 'Save', and 'Cancel'.

5. As a Request Manager, you can add/modify Request Description, Attachments.
6. You can change Project Name, Project Type, Start and End date.
7. Once you edit the details, click **Create iManage Activity**, a project will be created in iManage in **draft** stage. You will be navigated to the **iManage project creation page**:

Request Details

Request Number :	1316	Request Name :	Strategic Project Creation for IT Hardware
Assigned To :	Ushma	Description :	0

Project Details

* Indicate mandatory fields

Project Type :	SUPPLIER PROGRAM
Select Program :	IT Hardware
Project Title :*	IT Hardware
Project Description :	
Project Priority :	Medium
Planned Timeline :*	Start date of Project: 01/11/2016 End date of Project: <input type="text"/> <input type="checkbox"/> Start date not defined <input checked="" type="checkbox"/> End date not defined
Select Category for the project:*	Information Technology Broadcasting and Telecommunications <input type="button" value="Select Category"/>
Select Business Unit for the project	California (CA) Borregaard <input type="button" value="Select Business Unit"/>
Currency :	INR(Rs)
Project Owner :*	Ushma Furia

Note: You will not re-route to iManage. The iManage project page will open in iRequest.

8. On this page, you can add/edit following project details:

- Program
- Project Title
- Description
- Priority
- Planned Timelines
- Category and Business Unit
- Currency
- Project Owner.

9. Once you make the changes, click **Create Project**.

10. The status of the selected request will change to **In Progress**.

11. This project will be created in iManage as shown below:

Entity	Title	Owner	Status	Planned Start Date	Actual Start Date	Planned End Date	Actual End Date	Completion	Action
	Servers	iManage Cust_Admin	In Draft (iRequest)	2016/11/01	Not Defined	Not Defined	Not Defined	<div style="width: 0%;">0%</div>	Actions
	Cisco	iManage Cust_Admin	In Draft (iRequest)	2016/11/01	Not Defined	Not Defined	Not Defined	<div style="width: 0%;">0%</div>	Actions
	iRequest Request Proj...	iManage Cust_Admin	In Progress (iRequest)	2016/11/01	2016/11/14	2016/11/30	Not Defined	<div style="width: 70%;">70%</div>	Actions
	Intellinet	iManage Cust_Admin	In Draft (iRequest)	2016/11/01	Not Defined	Not Defined	Not Defined	<div style="width: 0%;">0%</div>	Actions
	Jasper	iManage Cust_Admin	In Draft (iRequest)	2016/11/01	Not Defined	2016/11/30	Not Defined	<div style="width: 0%;">0%</div>	Actions

Showing 10 records per page

12. The status of the project in **iManage** will be **In Draft** (highlighted in the image below).

Entity	Title	Owner	Status	Planned Start Date	Actual Start Date	Planned End Date	Actual End Date	Completion	Action
	Servers	iManage Cust_Admin	In Draft (iRequest)	2016/11/01	Not Defined	Not Defined	Not Defined	<div style="width: 0%;">0%</div>	Actions
	Cisco	iManage Cust_Admin	In Draft (iRequest)	2016/11/01	Not Defined	Not Defined	Not Defined	<div style="width: 0%;">0%</div>	Actions
	iRequest Request Proj...	iManage Cust_Admin	In Progress (iRequest)	2016/11/01	2016/11/14	2016/11/30	Not Defined	<div style="width: 70%;">70%</div>	Actions
	Intellinet	iManage Cust_Admin	In Draft (iRequest)	2016/11/01	Not Defined	Not Defined	Not Defined	<div style="width: 0%;">0%</div>	Actions
	Jasper	iManage Cust_Admin	In Draft (iRequest)	2016/11/01	Not Defined	2016/11/30	Not Defined	<div style="width: 0%;">0%</div>	Actions

Showing 10 records per page

13. The project created from iRequest will be hyperlinked with tag “(iRequest)” (highlighted in the image above).

14. For this newly created project, open the **Actions** drop down menu and click **Edit**. You can make changes and initiate the project.

15. In **iManage**, on the **Track** page, click the **iRequest** link from the **Status** column for a given project/program. You will be navigated on the **iRequest** page as shown below:

16. In case, if the project is **Strategic Project**:

The screenshot shows the iRequest application interface. At the top, there's a navigation bar with 'My Requests', 'My Approvals', 'Workbench', 'Request Definition', and 'Configuration'. The main content area is titled 'iManage_Strategic_IT Equipments'. It displays various details about the request, such as Request Number (2110), Request Definition (iManage_Request_Definition_Final), Request Type (iManage), and assigned user (Sean M). Below this, the 'iManage Project Details' section shows the project name (Servers), type (Strategic), start date (01/11/2016), and end date (30/11/2016). A 'Linked Documents' section is present, showing a table with one row for a linked document. The table has columns for Project Type*, Project Name*, Project Description, Project Start Date, Project End Date, Category*, Project Owner*, and Project Status. The data in the table is as follows:

Project Type*	Project Name*	Project Description	Project Start Date	Project End Date	Category*	Project Owner*	Project Status
Strategic	Servers	-	2016/11/01	Loading...	Electronic Parts	Sean M	In Draft

Below the table, there are buttons for 'Show 10 entries' and 'Showing Page 1 of 1'. The 'Workflow' section shows a status transition from 'Submitted' to 'Awaiting Action'. The 'Audit Trail' section is partially visible at the bottom.

17. You will be able to view all the details on the request raised to create this project in **iManage**.

18. Under the **Linked Document** section, you will see the latest changes made to the project by the **Project Owner**.

19. The **Audit Trail** will allow you to see the changes made to the request raised.

Project Type*	Project Name*	Project Description	Project Start Date	Project End Date	Category*	Business Unit	Project Owner*	Project Status
Strategic	Request iManage	Request iManage desc	10/01/2016		Building and Construction Machinery and Accessories	Borregaard Bhavishya_PC Updated 1 California (CA)	Ushma	In Draft

Show 10 entries Showing Page 1 of 1

Workflow

```

graph LR
    A[User Ushma Submitted 14/11/2016 09:13:36] --> B[User Ushma Approved 14/11/2016 09:16:25]
    B --> C[Request Manager Awaiting Action]
    
```

[View Comments](#)

Audit Trail

Actions	User	Version	Date	Comments
Activity created for the Request	Shank Admin	1	14/11/2016	Project AQPRJ6880 is created in Draft state
Request Saved	Ushma	1	14/11/2016	
System Approved	SYSTEM	1	14/11/2016	
Request Approved	Ushma	1	14/11/2016	Approved
Request Submitted	Ushma	1	14/11/2016	

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Chapter 8: Reports

iRequest provides two types of reports for users viz.

■ Pre-Canned reports

These reports are created by the administrator which cannot be edited by other users. The Pre-Canned reports are

1. Requests by Assigned Request Manager
2. Displays number of requests against the assigned Request Manager
3. Requests By Creation Date
4. Displays number of requests month-wise
5. Requests By Request Definition
6. Displays the number of requests against request definitions
7. Requests By Request Type
8. Displays the number of requests against the request types
9. Requests By Status
10. Displays all the requests against all the statuses
11. Request Turn Around Time
12. Displays all the requests with their respective Date of raising Request, Request Completion Date and the Total processing duration.

Report Name	Folder Name	Last Refresh on	Actions
Request Turn Around Time	Pre-Packaged Reports	-	Actions ▾
Requests by Assigned Request Manager	Pre-Packaged Reports	-	Actions ▾
Requests By Creation Date	Pre-Packaged Reports	-	Actions ▾
Requests By Request Definition	Pre-Packaged Reports	-	Actions ▾
Requests By Request Type	Pre-Packaged Reports	-	Actions ▾
Requests By Status	Pre-Packaged Reports	-	Actions ▾

13. Click **Actions**, then click **View details** to view the details of the report selected.

Report Name: Requests by Assigned Request Manager

Close

Refresh **Modify** **Filter** **Save As** **Export** **Print**

Tabular Report Created By: Harvey | Last Refresh on: 10/27/2014 02:38 PM

Request No.	Request Name	Request Definition	Current Status	Request Manager	Date of raising Request
5	Bill Of Material 2014	Software Price List	PROCESSED	Harvey	24-OCT-2014
4	Shareware price list	Software Price List	AWAITING APPROVAL	Harvey	24-OCT-2014
3	List of IT Softwares	Software Price List	AWAITING APPROVAL	Harvey	22-OCT-2014
2	List of all IT softwares	Software Price List	AWAITING APPROVAL	Harvey	22-OCT-2014
1	Hardware Price List	Request For Information	PROCESSED	Harvey	20-OCT-2014
Grand Total (5.0 records)					

Chapter 9: Product Configuration

iRequest authenticates an Admin user to configure the product.

9.1 Creating Request Type

5. To create a new request type, click **Configuration** tab.
6. **Customize** page will be displayed.
1. Under **Request Configuration** section, click **Request Type**. iRequest displays all records of the requests types with its respective details.
2. Click Create Request Type.

The screenshot shows the 'Create Request Type' interface. The 'Request Type Name' field contains 'Suppliers'. The 'End-Point' dropdown menu is open, showing options: '--Select--', 'Contract', 'None', 'Sourcing', and 'iManage'. The 'Description' field is empty. At the bottom, there are 'Submit' and 'Cancel' buttons. A tooltip in the bottom right corner displays a URL: <https://09849.irequest.zycus.net/#/configuration/request-type/search>.

3. Enter **Request Type Name** and the **Description** of the Request type.
4. Select the **End-Point** from the drop down list. You can choose from the following options:
 - **Sourcing** for creating Sourcing requests.
 - **Contract** for contract related requests.
 - **iManage** for creating a request to initiate a project in iManage.
 - **None** for creating a request definition for external users such as suppliers.
5. Click **Submit**. The newly created request type will be listed on the **Request Type** page.

Found 281 records.

Status	Request Type Name	End-Point	Created By	Created On	Actions
Active	KM_CM_iManage	iManage	4null0	2016/11/10	<button>Actions</button>
Active	iManage - Project	iManage	4null0	2016/11/10	<button>Actions</button>
Active	iManage iRequest Integration	iManage	Sean M	2016/11/10	<button>Actions</button>

Show 10 records per page. Showing Page 1 of 29

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NOTE: The End-Points are configured at the point of product deployment.

NOTE: Admin can Create Request Type while creating new Request Definition.

9.2 Creating Request Definition

iRequest authenticates an Admin user to create request definition.

1. Click Request Definition tab.
2. The **Request Definition** page displays the list of all **Request Definitions** created with their corresponding details.

Found 277 records.

Status	Request Definition Name	Request Type	Version	Created By	Updated On	Actions
Draft	Hardware List	Price List	1	James	01/08/2015	<button>Actions</button>
Draft	Software List	Price List	1	Amanda	01/08/2015	<button>Actions</button>
Draft	Inventory Data	Sourcing Requests	1	Jennifer	01/08/2015	<button>Actions</button>
Draft	Consolidated Prices	Bulk Sourcing	2	Stanley	01/08/2015	<button>Actions</button>

Show 10 records per page. Showing Page 1 of 1

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7. Click **Create Request Definition**. iRequest displays following window:

Create Request Definition

Request Definition Name *:

Available For *: Internal Users

Request Type Name *: Enter Request Type Name

FlexiForm: OFF

Workflow: OFF

Linked Documents: OFF

Help:

Comments:

Other Details

|

3. Enter a name for Request Definition.
4. Set the availability of this request definition. The available options are **Internal Users** and **External Users (Suppliers)**.
5. Enter the **Request Type Name**. This field classifies the Request Definition with its corresponding type. iRequest autocompletes the field by suggesting last 10 user Request Type Name.

Note: While creating a request definition for **External Users (suppliers)**, use the **Request Type Name** with **End-Point as None**.

Create Request Definition

Request Definition Name*:

Available For*:

Request Type Name*: +

FlexiForm: OFF

Workflow: OFF

Linked Documents: OFF

Help:

Comments:

Other Details

Request Manager Assignment

Required during Request Submission

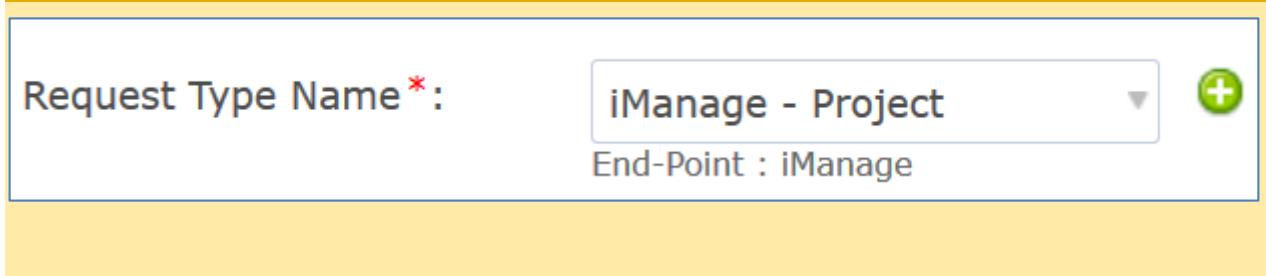
Default Assigned To:

Prevent Requester From Editing

Buttons at the bottom:

- Submit
- Save as Draft
- Cancel

Note: Based on the Request Type you select, it will specify the End-Point as Contract, Source, iManage, or None under the field. Refer the screenshot below for an example:



6. Click to add new Request Type. Enter **Request Type Name**, **End Point**, and **Description**. Click **Submit** once all the information is entered. Refer Creating Request Type for more details.

The dialog box has the following fields:

- Request Type Name *:** Contract Creation
- End-Point *:** Contract
- Description:** (Large text area)

Buttons at the bottom: **Submit** (highlighted in blue) and **Cancel**.

7. Click **ON** for configuring Flexiform for creating the Request Definition. Click **Configure** to start configuring the Flexiform.
8. Refer 10.1 Configuring Flexiform to understand Flexiform configuration in detail.

NOTE: Fields in Workflow may be dependent on the fields in Flexiform. Hence it is recommended for users to configure Flexiform with the respective fields and then configure workflow.

9. Click **ON** for configuring workflow for creating the Request Definition. Click **Configure** to start configuring the Workflow.
10. Refer 10.2 Configuring Workflow to understand Workflow configuration in detail.
11. Click **ON** for **Linked Documents** to allow linking documents to a request definition.
12. Refer [Configuring Linked Documents](#) to understand Linked Documents Configuration in detail.
13. Enter suitable text for **Help** and **Comments**.
14. Check **Required during Request Submission** field to enable the **Default Assigned to** field as mandatory on the request page.

15. Select **Default Assigned To** from the drop-down list. User can also assign the request to a group of users. Check **Not editable by requester** if you wish the assigned entity to be non-editable. If this option is unchecked requester can change the assigned to entity.
16. Click **Submit** once you finish creating a request definition.

Chapter 10: Configurations

10.1 Configuring Flexiform

Flexiform allows customizing the fields for a request. To configure a Flexiform, click **Request Definition** and then click **Create Request Definition**.

Create Request Definition

Request Definition Name*:

Available For*:

Request Type Name*: [+ New](#)

Flexiform: OFF

Workflow: OFF

Linked Documents: OFF

Help:

Comments:

Other Details

Request Manager Assignment

Required during Request Submission

Submit **Save as Draft** | **Cancel**

10.1.1. Configuring Flexiform using Field Library

1. Click **ON** against Flexiform and then click **Configure**. Following workflow editor is displayed.

FlexiForm Studio

Configure FlexiForm for Steel RFQ

Field Library

- iOptimize
- Field Library
- SPM
- iMaster
- ZycCommonHeader
- iConsole
- Test product
- SIM
- iMine
- iRequest
- Notification
- test2
- eProc
- OneView
- workflow_test_product
- iMonitor
- iContract
- eInvoice
- ZadgetFramework
- iManager
- Supplier Portal
- TMS
- cxzrc**
- Custom Fields
- Collections

Request Name*:

Request Description:

Assigned to*:

Request Type:

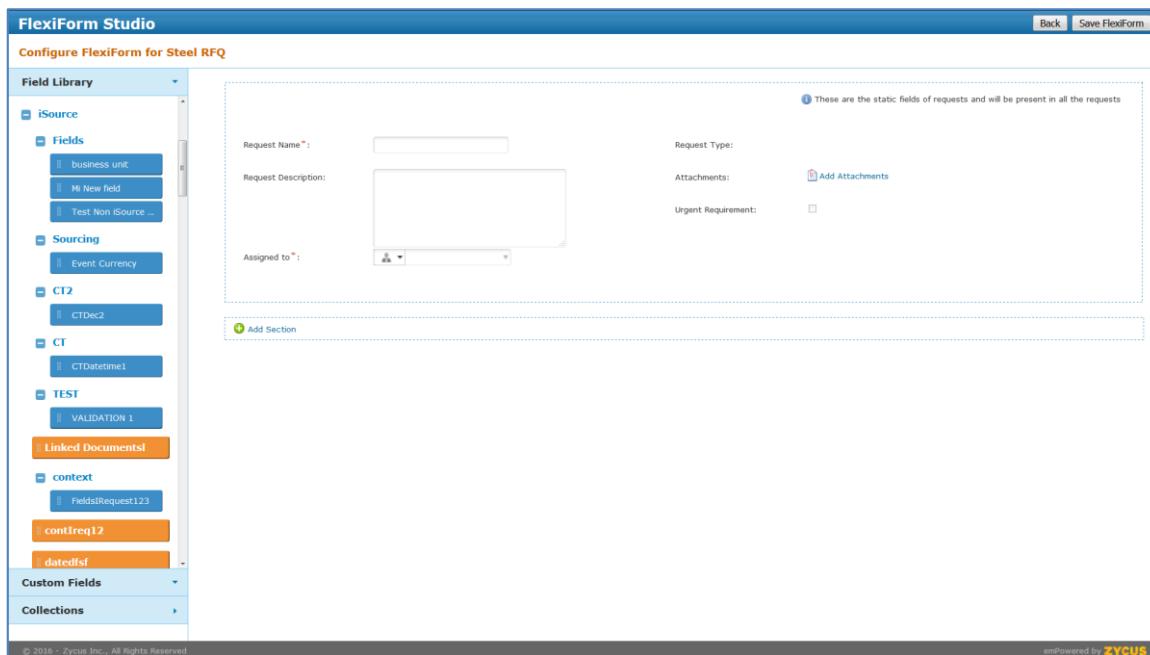
Attachments: Add Attachments

Urgent Requirement:

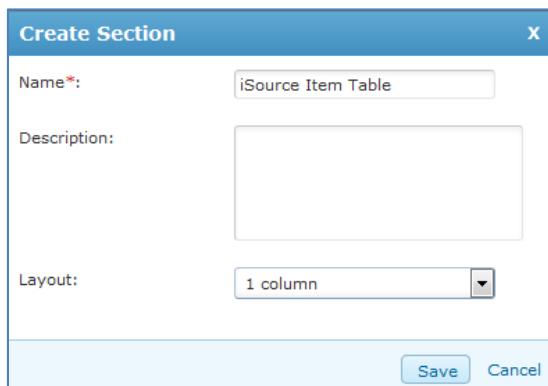
These are the static fields of requests and will be present in all the requests

Back **Save FlexiForm**

2. Click any desired field from **Field Library**. Below image displays the extended menu for the selected Field Library element **iSource**.



3. Click **Add Section** to create a form for the request.



4. Enter the **Name** and **Description** of the Item table to be added to the section. Select the **Layout** (1 column / 2 column) and click **Save**.
5. Select from the list of elements and drag-drop the item table into the section as shown below.

NOTE: User can add 100 items in the table at a time.

The screenshot shows the FlexiForm Studio interface. On the left, there's a sidebar titled 'Field Library' containing sections for 'Items' (with sub-options like Item Number_0, Unit of Measures, etc.) and 'Custom Fields'. Below that is a 'Collections' section. The main workspace is titled 'Configure FlexiForm for test for sourcing request'. It contains fields for 'Request Name*', 'Request Description', 'Request Type', 'Attachments' (with a link to 'Add Attachments'), 'Urgent Requirement', and 'Assigned to'. Below these is a preview area with the ID '2342' and a table titled 'tghp'. The table has columns: Quantity*, Item Name*, itl_cmsss*, Item Number*, Unit of Measure, Price Type*, DEMO_TESTIN, attachments file, attachments file, attachments file, 7856u7yjhgb..., Mi New field*, and amr23*. At the bottom of the preview area is a button labeled 'Add Section'.

- Following **Edit Collection** window pop up to select Items from the entire item table selected and click **Save**.

The screenshot shows the 'Edit Collection' dialog box. It has two input fields: 'Name*' and 'Key *'. Below is a list of items with checkboxes:

- Internal Price
- Item Description
- Item Name
- Item Number
- Price Type
- Quantity
- Supplier Name
- Target Price
- Unit of Measures

At the bottom are 'Save' and 'Cancel' buttons.

- The item table with the above selected items are displayed in the section.

FlexiForm Studio

Configure FlexiForm for test for sourcing request

Field Library

- Items
 - Item Number_0
 - Unit of Measures
 - Price Type_903
 - Target Price
 - Item Description
 - Quantity
 - Item Name
 - Internal Price
 - Current Price
 - it2cmss
 - it1_cmss
 - it2msrb
 - itkmstb
 - Item Number
 - Unit of Measures
 - Target Price2
 - Item Number
 - Price Type
 - Supplier Name
 - demot459
 - DEMO_TESTING
 - attachments fields
 - attachments fields
 - attachments fields
 - 7856u7yjhgbdr
- Custom Fields
- Collections

Request Name*:

Request Description:

Request Type:

Attachments:

Urgent Requirement:

Assigned to*:

2342

Drag & Drop fields below

Quantity*	Item Name*	it1_cmss*	Item Number*	Unit of Measure	Price Type*	DEMO_TESTIN...	attachments fie...	attachments fie...	7856u7yjhgb...	Mi New field*	amr23*

Add Section

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- Click **Save FlexiForm** to save the Flexiform for the corresponding request.

Note: Field Library cannot be configured with a table definition.

10.1.1.1 iManage: Field Library

- To configure a **FlexiForm** for iManage type of request definitions, on Request Definition Creation page, select **Request Type Name** configured for iManage.
- Flip the switch against **FlexiForm** and click **Configure**. You will land on the following page:

Configure FlexiForm for iManage Integration

iRequest iManage Integration Enter Description

Field Library

- + CentralRMS
- + Dashboard
- + eInvoice
- + eProc
- + Field Library
- + FlexiForm Studio
- + iAnalyze
- + iConsole
- + iContract
- + iCost
- + iManage
- + iMine
- + iRequest
- + iSave
- + iSource
- + Notification
- Custom Fields**

Request Name*: [Input Field]

Request Description: [Text Area]

Assigned to*: [Select Box]

Request Type:

Attachments:

Urgent Requirement:

(*) These are the static fields of requests and will be present in all the requests

Add Section

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- Click Add Section.

Create Section

Name*: iManage Project Details

Description:

Layout: 1 column

Save **Cancel**

- Enter the **Name** and **Description** of the Item table to be added to the section. Select the **Layout** (1 column / 2 column) and click **Save**.
- From the **Field Library** panel on the left side, click + against **iManage** to expand all the containers configured as shown below:

Configure FlexiForm for iManage Integration

iRequest iManage Integration Enter Description

Field Library

- iManage Request Co...**
 - Project Description
 - Project End Date
 - Project Name
 - Project Start Date
 - Project Type
- Demo_Container1**
 - Demo Field 1
 - new field
 - Demo_Filed2
- iManage New**
 - Manager Of Sour...
- iManage_Project_Co...**
 - 23Mig_Check_No...
 - 23Mig_Mult Drop...
- Custom Fields**
- Collections**

Request Name*: Request Type:

Request Description:

Attachments:

Urgent Requirement:

Assigned to*:

iManage Project Details

Drag & Drop fields below

Add Section

Cancel Save FlexiForm

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- Drag and drop the fields from a container in the newly created section as shown below:

Field Library

- iManage Request Co...**
 - Project Description
 - Project End Date
 - Project Name
 - Project Start Date
 - Project Type
- Demo_Container1**
 - Demo Field 1
 - new field
 - Demo_Filed2
- iManage New**
 - Manager Of Sour...
- iManage_Project_Co...**
 - 23Mig_Check_No...
 - 23Mig_Mult Drop...
 - 23Mig_Multi Drop...
 - 23Mig_Multi Drop...
 - 23Mig_Numeric...
- Custom Fields**
- Collections**

iManage Project Details

Drag & Drop fields below

Project Name*:

Project Type*:

Project Description:

Project Start Date:

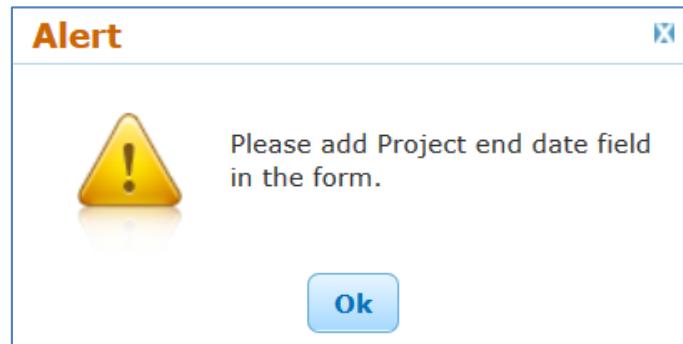
Add Section

Cancel Save FlexiForm

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- You cannot use a table in this section.
- If there are any fields which are mandatory and not added in the section, then you will be prompted to add that field. Refer the screenshot below:



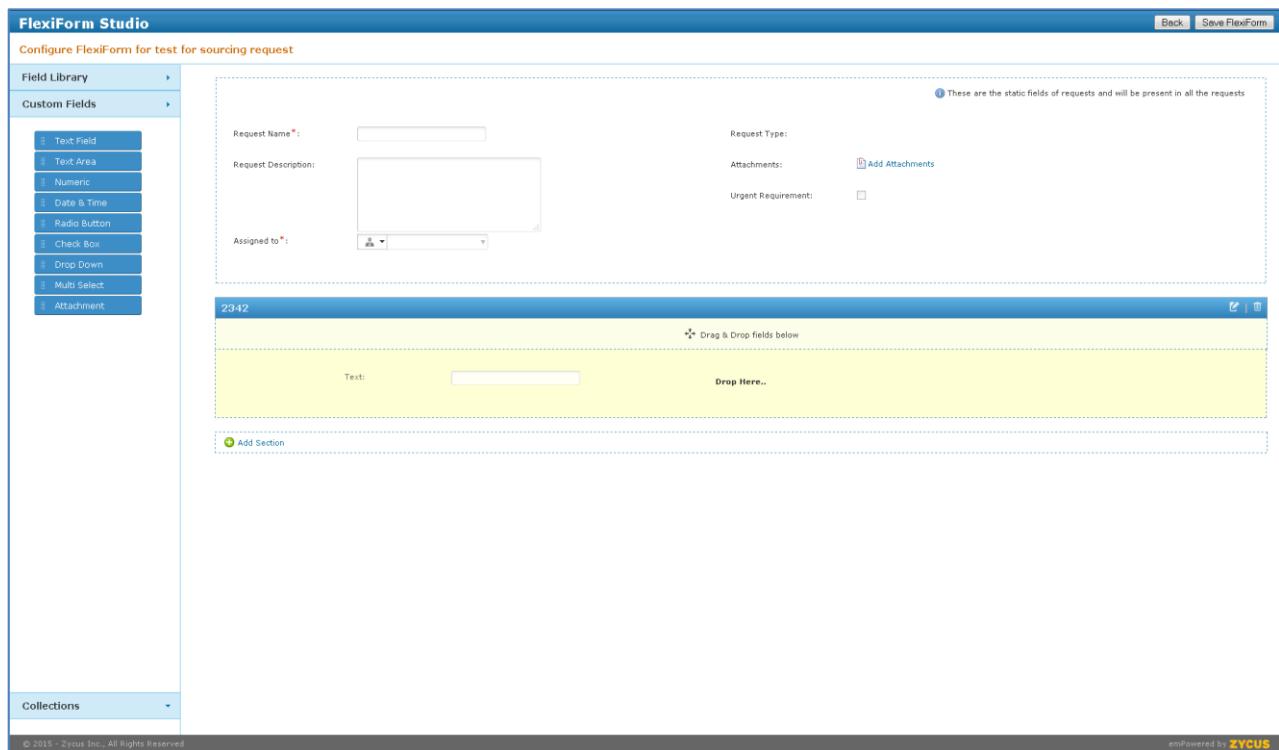
9. Make the necessary changes and click **Save FlexiForm**.

10.1.2. Configuring Flexiform using Custom Fields

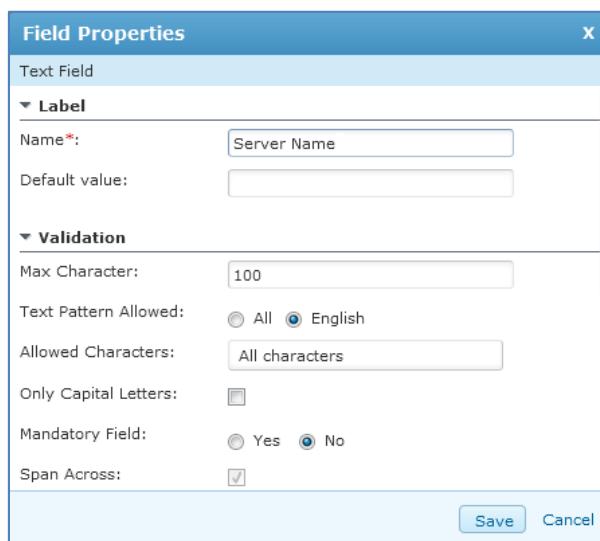
1. Click **Custom Field** to view the custom field options as shown below.

2. Click **Add Section** to create a form for the request with custom fields.

3. Enter the **Name** and **Description** of the item table to be added to the section. Select the **Layout** (1 column / 2 column) and click **Save**.
4. Select a field from the custom fields listed on the panel on the left side. Drag-drop the selected item table into the section as shown below.

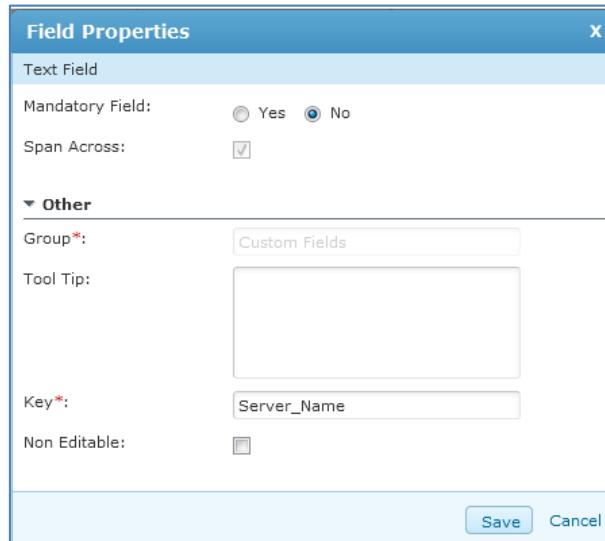


5. Following Field Properties dialog box window pops up wherein the user can select items from the property box and click **Save**.



6. Enter the Name for selected Custom Field (Text Field), enter default value, if any.
7. Enter Max. Character allowed for the label.
8. Select Text Pattern Allowed (All / English) and select Allowed Characters from three options provided (All characters / Alphabets / Alphanumeric).
9. Choose Only Capital Letters option if you wish to allow label only in uppercase.
10. Select Yes for **Mandatory Field**, if the field needs to be mandatory.

11. Selecting Span Across enables the field to be present in both columns. Span Across is selected by default if Section layout is of 2 columns.



12. Group is by-default selected as Custom Fields.
13. Enter Tooltip for the field, if any.
14. Key is automatically populated as per the label provided.
15. Choose Non Editable if you wish the custom field to be edited by other user. Click Save to create the field with the above field properties.

FlexiForm Studio

Configure FlexiForm for test for sourcing request

Field Library

Custom Fields

- Text Field
- Text Area
- Numeric
- Date & Time
- Radio Button
- Check Box
- Drop Down
- Multi Select
- Attachment

Request Name*:

Request Description:

Request Type:

Attachments:

Urgent Requirement:

Assigned to*:

tdhyfghfg

Drag & Drop fields below

radiobutton: radio1 radio2 radio3

textarea:

Add Section

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16. Description of all the unique fields is described in the following table:

Numeric Parameters	Properties
Type (Number / Percentage)	Select the type of Numeric value as Number or Percentage.
Allow Decimals(Precision)	Choose this option to allow decimals and enter the digits allowed after decimal.
Allow Positive Numbers	Choose this option to allow numbers greater than zero.
Allow Negative Numbers	Choose this option to allow numbers lesser than zero.
Exclude Zero	Choose this option if you wish to exclude zero for the numeric value.
Value Restriction(Range)	Choose this option to restrict number selection to a specified range provided.
Date & Time Parameters	Properties
Type	Select Date or Date & Time
Do not Allow Historic Dates	Choose this option if you do not wish to enable historic dates.
Do not Allow Future Dates	Choose this option if you do not wish to enable future dates.
Do not Allow Today's Date	Choose this option if you wish to exclude today's date.
Radio Button Parameters	Properties
Enter Choices	Enter choices to select from for the radio button option
In Alphabetical Order	Choose this option if you wish to auto arrange the radio button options in alphabetical order.
Check Box Parameters	Properties
Enter Choices	Enter choices to select from for the checkbox option
In Alphabetical Order	Choose this option if you wish to auto arrange the checkbox options in alphabetical order.
Drop Down Parameters	Properties
Enter Choices	Enter choices to select from for the checkbox option
In Alphabetical Order	Choose this option if you wish to auto arrange the checkbox options in alphabetical order.
Multi-Select Parameters	Properties
Enter Choices	Enter choices to select from for the checkbox option

Numeric Parameters	Properties
In Alphabetical Order	Choose this option if you wish to auto arrange the check box options in alphabetical order.

NOTE: The Attachment custom field can allow upload of up to 10 files of 128MB.

10.1.3. Configuring FlexiForms using Collections

1. Tenant specific collections can be configured as required
2. Once configured they are available on the **FlexiForm**, along with custom fields and **Field Library** tabs.

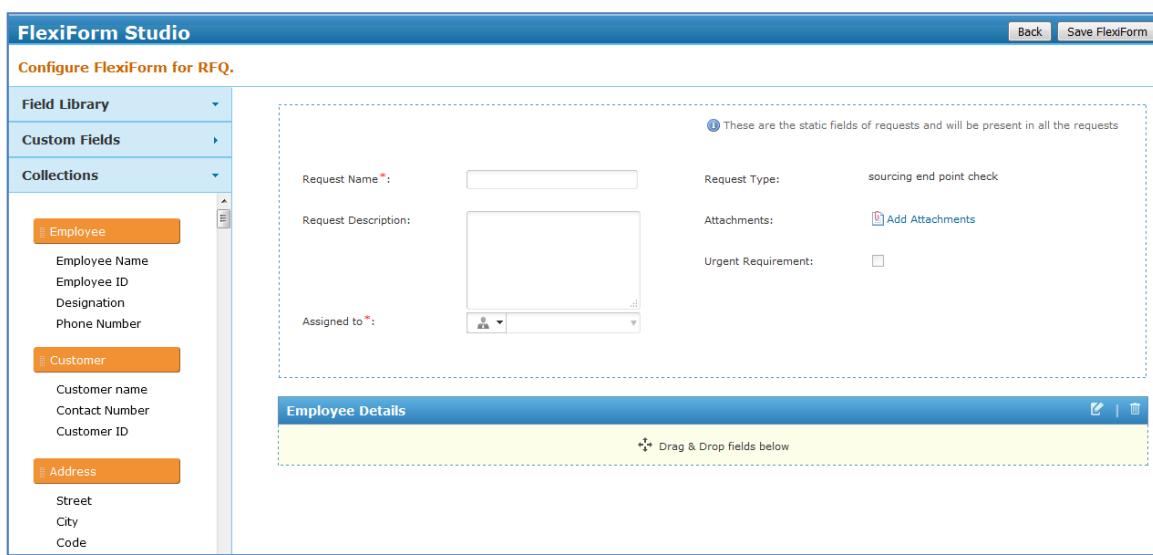
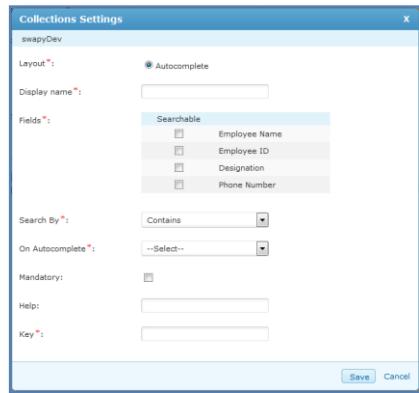


Figure 1: FlexiForm Studio with custom fields and Field Library

3. They can be dragged on single column sections. On drag and drop, administrator can configure the details which are:
 - a) Display label of the **Autocomplete** fields
 - b) Search should be on which fields (At a time maximum of 3 fields can be made searchable)
 - c) The result should be displayed on which of the searched fields i.e. On the **Autocomplete** field.



3.1.4 Collections on Forms (As Autocomplete)

1. These collections will be rendered as **Autocomplete** fields on the form for the end user.

2. On entering a minimum of 3 characters the search will be triggered. The search results will be displayed in two lines; where the first line will indicate the result which will be saved and the second line will display the other two searchable fields.
3. User's entry will be saved with the **Autocomplete On** field.

NOTE: This functionality allows capturing important information from the user in a crisp manner.

10.2 Configuring Workflow

Workflow is configured in case of an approval chain in the processing requests. To configure workflow, click **Request Definition** and then click **Create Request Definition**.

Create Request Definition

Request Definition Name*: Test Request New

Request Type Name*: Sourcing.
End-Point : Sourcing

FlexiForm: **ON** **Configure**

Workflow: **ON** **Configure**

Linked Documents: **OFF**

Help:

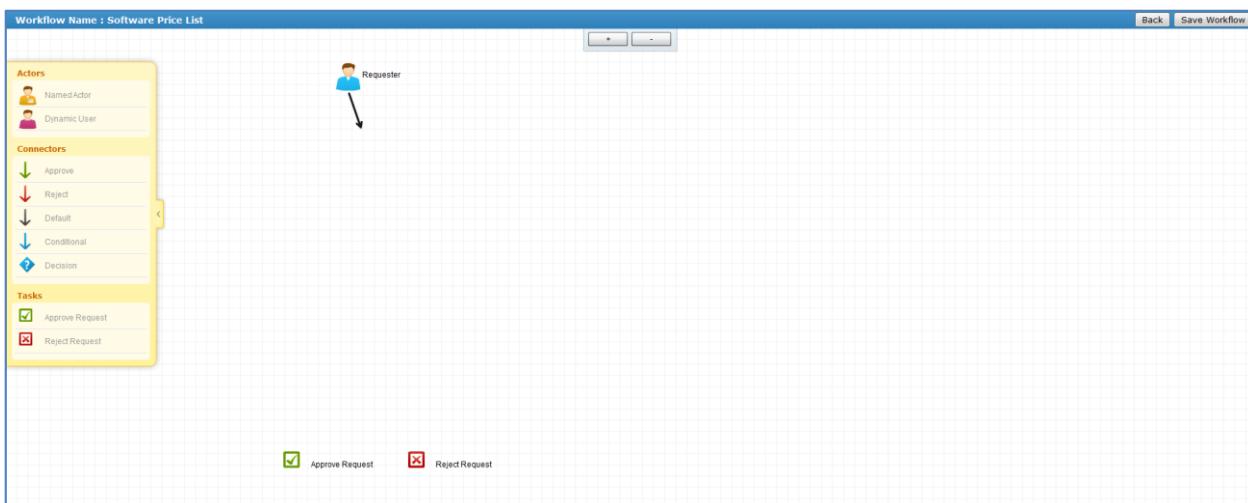
Comments:

Other Details

Request Manager Assignment

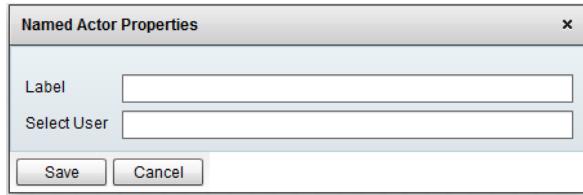
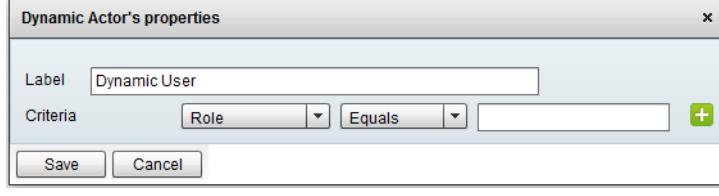
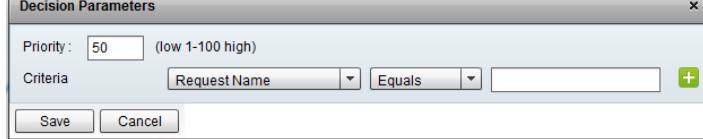
Submit [Save as Draft](#) | [Cancel](#)

- Click **ON** against **Workflow** and then click **Configure**. Following workflow editor is displayed.

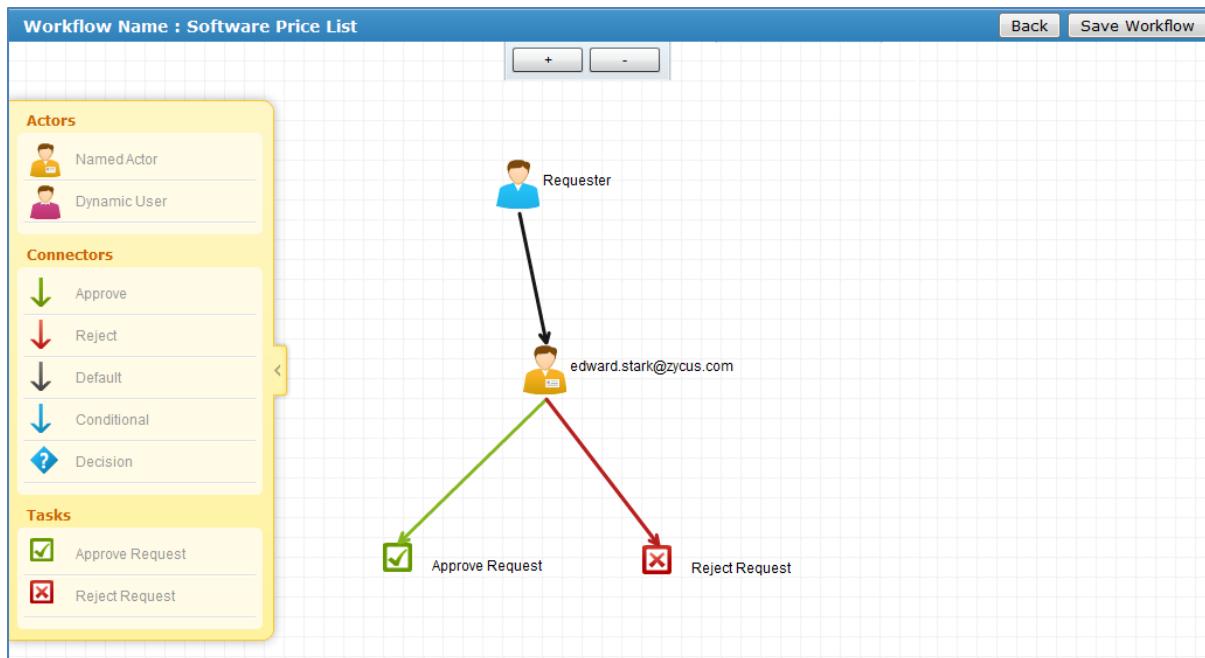


- The left panel contains list of all elements for designing the workflow.
- To design workflow, drag and drop required element one at a time from the panel to empty space at the right side of the panel. By default for reference, a requester element is placed to start designing the workflow.
- In the workflow editor, **Actors** are the user that will be configured as per their roles and authorities.
- The following table describes the elements in the panel:

Element	Description	Properties
+ -	Zoom in / Zoom out	NA

Actors		
 Named Actor	Actor is any user in the organization	 <p>Named Actor Properties</p> <p>Label: <input type="text"/></p> <p>Select User: <input type="text"/></p> <p>Save Cancel</p>
 Dynamic User	Actor is a user defined based on attributes e.g. dept. Allows allocation of multiple users to this Actor.	 <p>Dynamic Actor's properties</p> <p>Label: Dynamic User</p> <p>Criteria: Role Equals <input type="text"/> +</p> <p>Save Cancel</p>
Connectors		
 Approve	Sets direction for approval	NA
 Reject	Sets direction for rejection	NA
 Default	Sets direction only in case of decision (connector)	NA
 Conditional	Sets direction for flow involving condition check	 <p>Decision Parameters</p> <p>Priority: 50 (low 1-100 high)</p> <p>Criteria: Request Name Equals <input type="text"/> +</p> <p>Save Cancel</p>
 Decision	Decision box for directing flow as per condition to be checked	 <p>Decision properties</p> <p>Label: Decision</p> <p>Save Cancel</p>
Tasks		
 Approve Request	Marks completion of process / sub-process with an request approval	NA
 Reject Request	Marks completion of process / sub-process with an request approval	NA

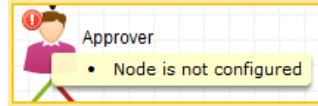
6. Following figure depicts a sample workflow configured with a simple request approval / rejection flow.



7. After designing the workflow with appropriate users click **Save Workflow**.

NOTE: In case after saving the workflow a red exclamation mark is displayed besides any of the actor/s, hover the mouse over the red exclamation mark. It displays the corresponding error example - Node is not configured as shown below.

This message indicates that all the parameters under the actor properties have not been configured properly.

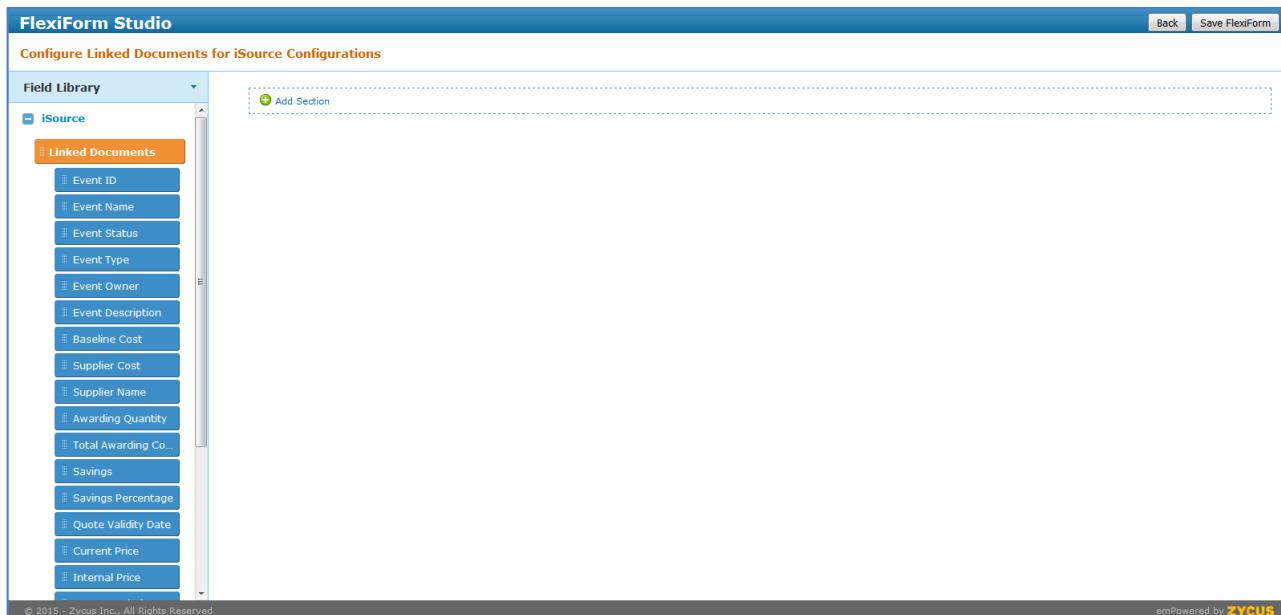


8. Make the appropriate changes and click **Save Workflow**.

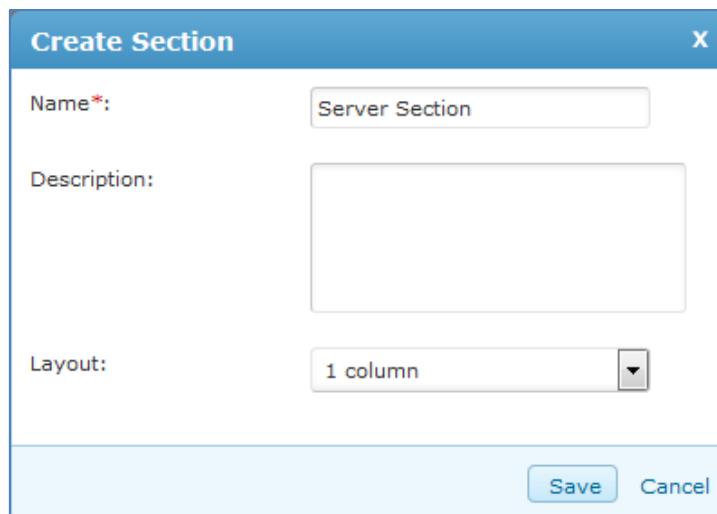
10.3 Configuring Linked Documents

Linked Documents allows the requester to view a detailed result of the requests on the request page. To configure a Linked Document, click **Request Definition** and then click **Create Request Definition**.

1. Click **ON** against **Linked Documents** and then click **Configure**. Following workflow editor is displayed.



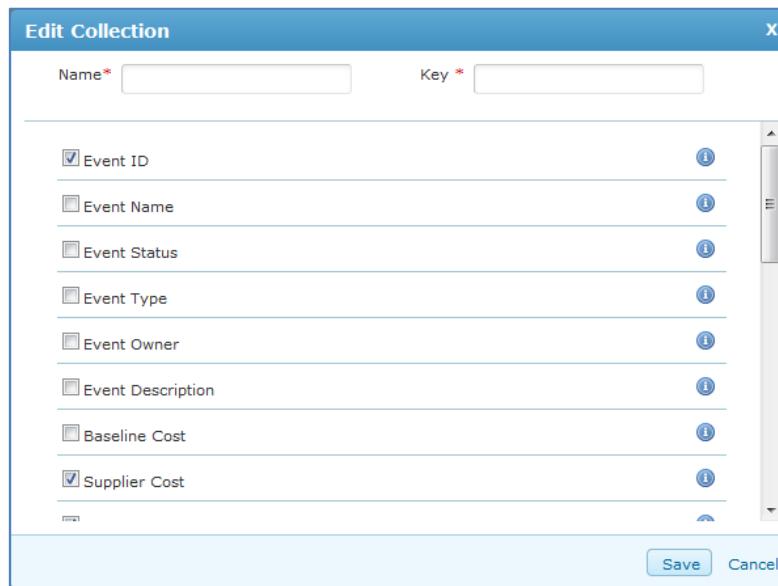
2. Click **Add Section** to create a form for the request.



3. Enter the **Name** and **Description** of the Item table to be added to the section. Select the **Layout** (1 column / 2 column) and click **Save**.

4. Select from the list of elements and drag-drop the item table into the section as shown below.

5. Following Edit Collection window pop up to select Items from the entire item table selected and click Save.



6. The **Linked Documents** are updated automatically. **iRequest** displays all the requests linked with the selected request and its corresponding status and request type. Linked Documents are updated after every activity in iRequest or any other integrated application. Below image displays the attributes of Linked Documents which are Documents Name (as the Request name), Documents ID/No. (auto generated), Request **Type** and the subsequent **Status** of the request.

Linked Documents					
Document Name	Document ID / No	Type	Status	Updated On	
iReq: Hardware Prices	1610025761	RFQ	Draft: In Progress	01/06/2015	
iReq: Hardware Prices	1610025756	RFQ	Draft: In Progress	01/06/2015	
iReq: Hardware Prices	1610025757	RFQ	Event: Not Setup	01/06/2015	

Show 10 records per page. Showing Page 1 of 1 >>

Note: The hyperlinked Request Name as highlighted above directs user to iSource. Every request is prefixed with 'iReq:' to identify events in iSource that were raised as requests from iRequest.

Note: Linked document cannot be configured without a table definition.

10.3.1. iManage: Linked Documents

1. To configure linked documents for iManage type of request definitions, on Request Definition creation page, select **Request Type Name** configured for iManage.
2. Flip the switch against **Linked Documents** and click **Configure**. You will land on the following page:

Configure Linked Documents for iManage Integration

iRequest Enter Description

Field Library	
<input checked="" type="checkbox"/> iManage	<input type="button" value="Add Section"/>
<input type="button" value="iManage Linked Doc..."/>	
<input type="button" value="Project Type"/> <input type="button" value="Project Name"/> <input type="button" value="Project Description"/> <input type="button" value="Project Start Date"/> <input type="button" value="Project End Date"/> <input type="button" value="Category"/> <input type="button" value="Business Unit"/> <input type="button" value="Project Owner"/> <input type="button" value="Project Status"/>	

Cancel

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3. Since the **End-Point** is selected as **iManage**, only the containers relevant to iManage will be visible in the **Field Library**.
4. Click **+Add Section** to create a new section.
5. Drag and drop a table from the **Field Library** as shown below:

Edit Collection

Name*	iManage Projects	Key *	iManage_Projects
<input checked="" type="checkbox"/> Project Type i <input checked="" type="checkbox"/> Project Name i <input type="checkbox"/> Project Description i <input checked="" type="checkbox"/> Project Start Date i <input type="checkbox"/> Project End Date i <input checked="" type="checkbox"/> Category i <input type="checkbox"/> Business Unit i <input checked="" type="checkbox"/> Project Owner i			
Save Cancel			

6. Check the boxes against the fields which will be visible in the table. Click **Save**. The fields will appear as shown below:

Configure Linked Documents for iManage Integration

iRequest	LinkedDocument_iManage Integration	Enter Description															
<div style="border: 1px solid #ccc; padding: 5px;"> Field Library ▼ iManage iManage Linked Doc... Project Type Project Name Project Description Project Start Date Project End Date Category Business Unit Project Owner Project Status </div>																	
<div style="border: 1px solid #ccc; padding: 5px;"> <p>iManage Project Details</p> <p style="text-align: right;">Drag & Drop fields below</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="5">iManage Projects (Manage Linked Document)</th> </tr> <tr> <th>Project Type*</th> <th>Project Name*</th> <th>Project Start Da...</th> <th>Category*</th> <th>Project Owner*</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p style="text-align: center;">+ Add Section</p> </div>			iManage Projects (Manage Linked Document)					Project Type*	Project Name*	Project Start Da...	Category*	Project Owner*					
iManage Projects (Manage Linked Document)																	
Project Type*	Project Name*	Project Start Da...	Category*	Project Owner*													
Cancel Save Flexiform <small>empowered by ZYCUS</small>																	

7. Click Save Flexiform.

10.4 Other Configuration

Request Configuration

1. This section covers all the configuration options for a user (Requestor/ Approver/ Request Manager) and Administrator.

The screenshot shows the ZYCUS iRequest interface. At the top, there's a navigation bar with links for 'My Requests', 'My Approvals', 'Workbench', 'Reports', 'Request Definition', and 'Configuration'. The 'Configuration' tab is active. Below the navigation is a 'Customize' section. On the left, under 'Request Configuration', there's a link to 'Request Type'. On the right, under 'Settings', there are links for 'General Settings' and 'Email Templates'. At the bottom of the page, there's a footer with the text '© 2015 - Zycus Inc., All Rights Reserved.' and 'emPowered by ZYCUS'.

2. Click **Request Type** under **Request Configuration** to create, view and deactivate existing Requests Types. Following page will be displayed.

The screenshot shows the 'Request Type' list page. At the top, there's a header with 'Request Type' and a 'Create Request Type' button. Below the header, it says 'Found 37 records.' and there are filters for 'Status', 'Request Type Name', 'End-Point', 'Created By', and 'Created On'. The main area is a table with four rows of data:

Status	Request Type Name	End-Point	Created By	Created On	Actions
Active	Sourcing Hardware	Sourcing	swaroop	01/06/2015	Actions
Active	Sourcing Software	Sourcing	amar	01/05/2015	Actions
Active	IT Assets	Sourcing	amar	01/05/2015	Actions
Active	Inventory Categorization	Sourcing	amar	01/05/2015	Actions

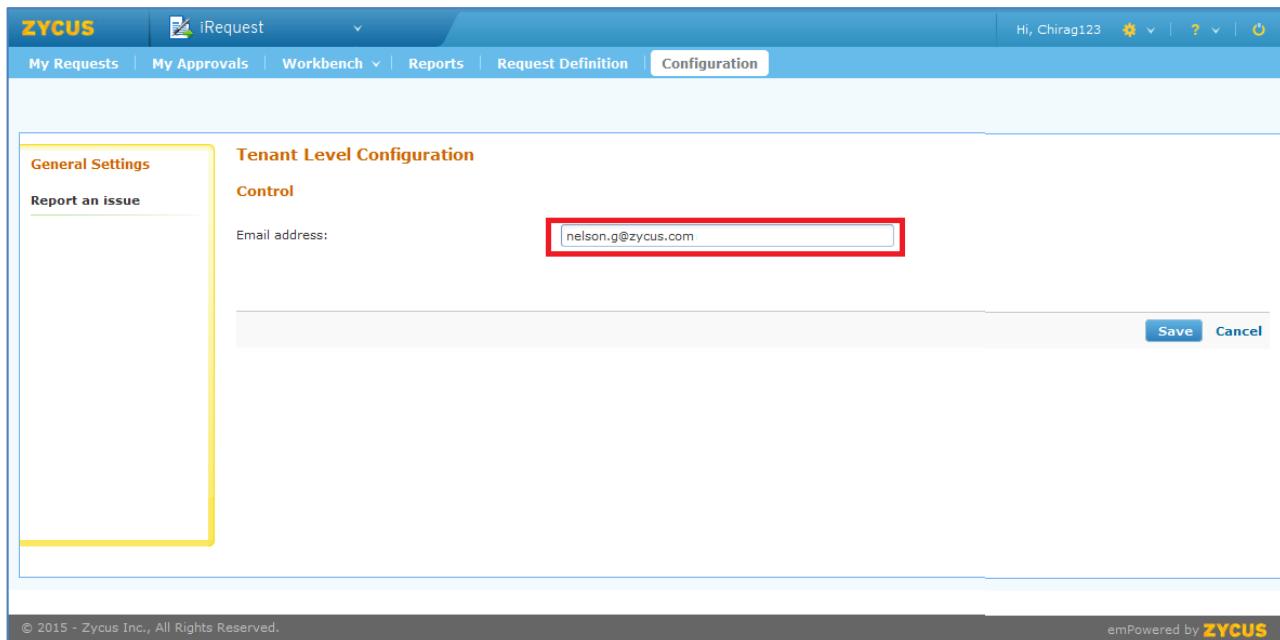
At the bottom, there's a footer with '© 2015 - Zycus Inc., All Rights Reserved.' and 'emPowered by ZYCUS'.

3. View and Deactivate options are available under **Action**.

10.5 Settings

General Settings

- The issues reported using **Report an issue** are directed to a mail address which can be set using the **Configuration > General Settings** option as shown below:



- After the user clicks **Save**, a notification mail is sent to the email address provided in the field. Sample mail notification is as shown below:

From - iRequestAdmin@zycus.com
 To - <Configured Email ID>
 Subject - Verification Mail
 Body -
 This mail is to verify the configured email ID in iRequest.
 You will receive emails when a user reports an issue.
This is an auto-generated mail, please do not reply to this mail.

Email Templates

- User can edit the message template by changing the **Subject** and the email **Body**. As per the examples shown below, user can use the keys relevant to the message. Click icon to view the permissible list of keys for **Subject** and **Body**.

The screenshot shows the iRequest software interface. At the top, there's a navigation bar with links for 'My Requests', 'My Approvals', 'Workbench', 'Reports', 'Request Definition', and 'Configuration'. On the right side of the header, it says 'Hi, Chirag123' with a dropdown arrow and other icons.

The main content area has a title 'Request Submitted' under the heading 'Events'. On the left, there's a sidebar with a list of events: 'Request Submitted' (which is selected and highlighted in yellow), 'Awaiting Approval', 'Request Approved', 'Request Rejected', 'Request Sent To RM', 'Request Returned', 'Request Manager Modified', 'Activity Created', and 'Request Completed'.

The main form area contains fields for 'Subject*' and 'Body*'. The 'Subject' field contains the placeholder '%REQ_NAME% - %REQ_NO% Has been submitted'. The 'Body' field contains a template message:

```

Dear %REQUESTER%,
Request with Request name - %REQ_NAME% and Request
Number - %REQ_NO% has been submitted.
Description - %REQ_DESCRIPTION%
The Request is now in %Next_Action% status test

```

At the bottom right of the form are 'Save' and 'Cancel' buttons. At the very bottom of the page, there's a footer with the text '© 2015 - Zycus Inc., All Rights Reserved.' and 'emPowered by **ZYCUS**'.