iRequest User Manual

17.04.1.0

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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 wit 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
Italic	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 to 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.

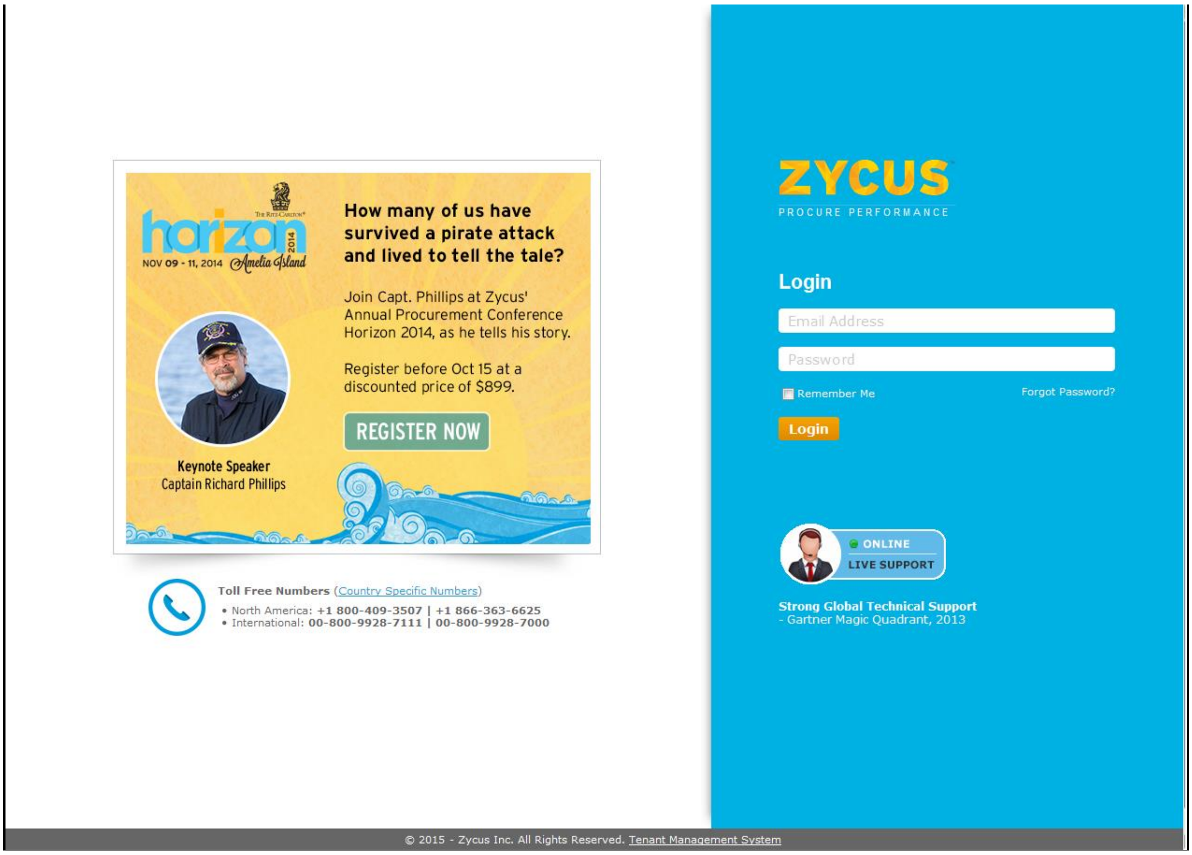
Chapter 3. Getting Started

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.



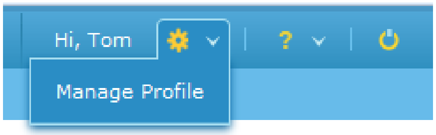
2. Enter user’s login credentials and click **Sign In**.
3. On the product selection page, click **iRequest**.

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.

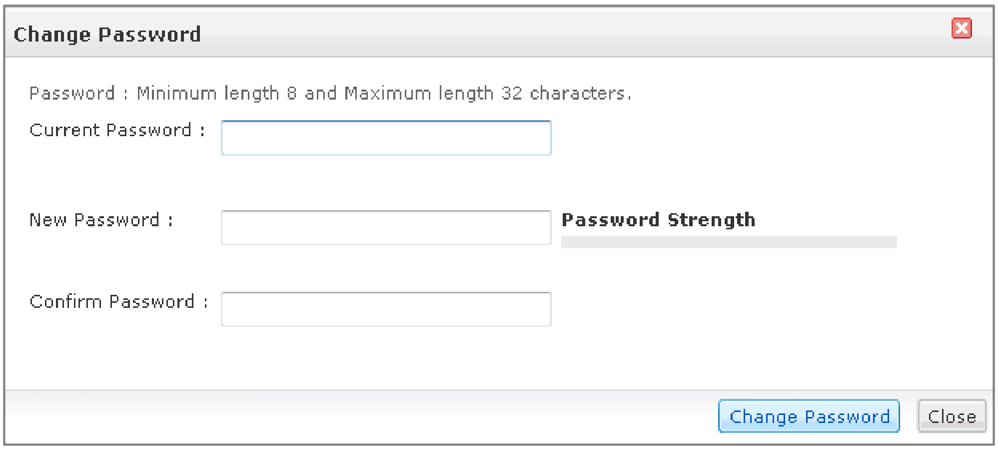
NOTE: The Mobile PIN feature is user specific and it should be active.

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:

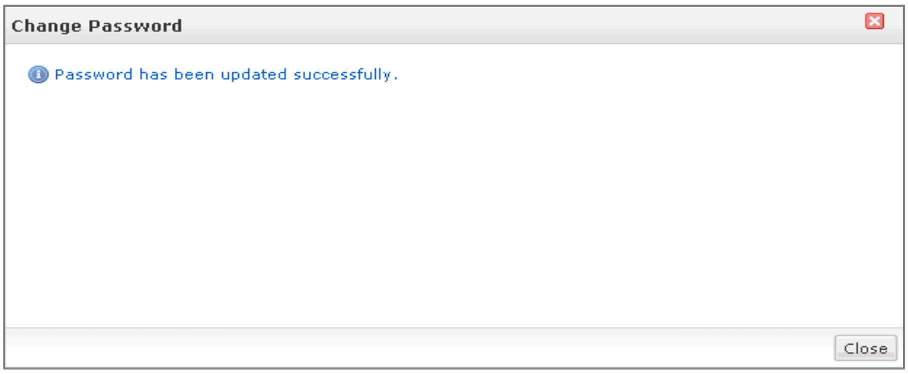
1. Click setting button located at the upper-left corner of the page, click the **Manage Profile** as shown below.
2. Under User Details, click **Change Password**.



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

NOTE: Password must contain minimum eight characters.

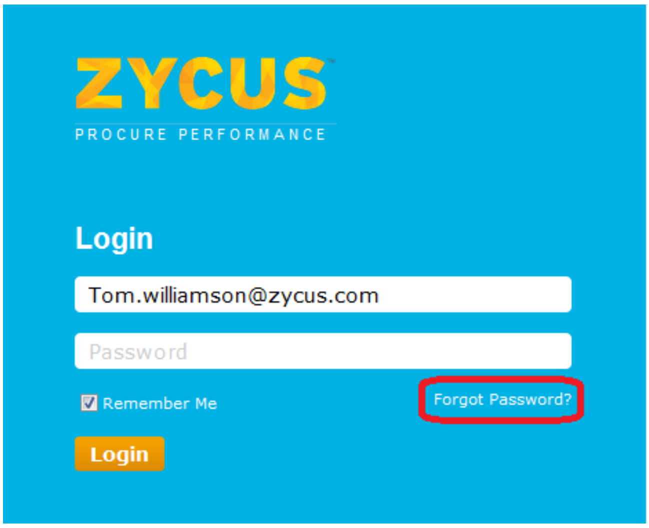
4. Click **Change Password**. iRequest displays the following confirmation message.

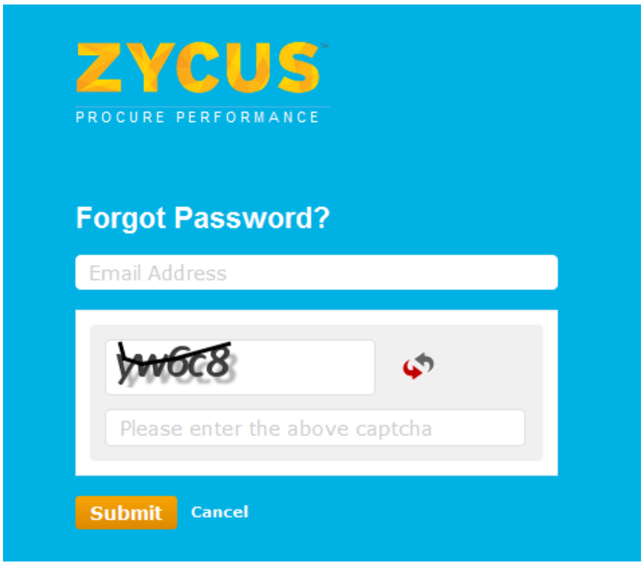


3.1.4 Recovering Password

To recover password:

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



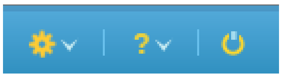


2. Enter **Email Address** and the code displayed in the lower text-box and click **Submit**. An email is sent to the email account with the login credentials.

NOTE: Click to refresh the code.

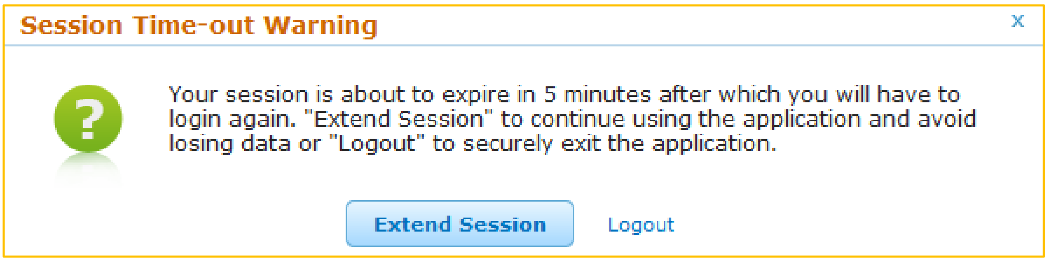
3.1.5 Logging Out of iRequest

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.



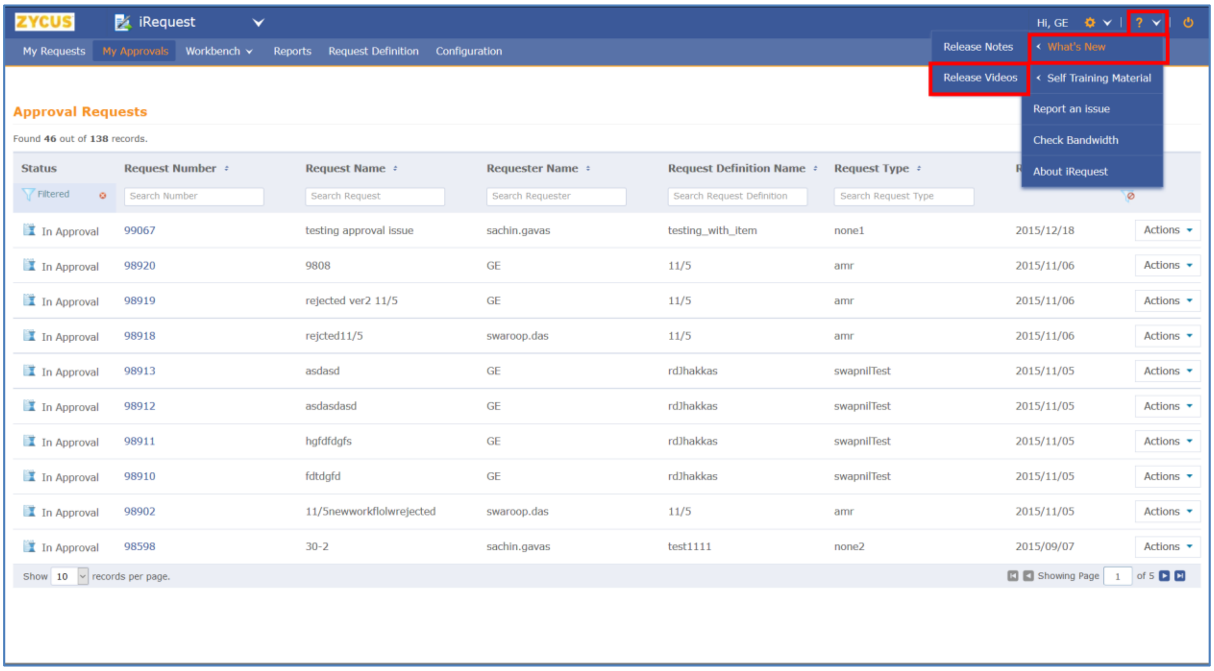
3.2 Help

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

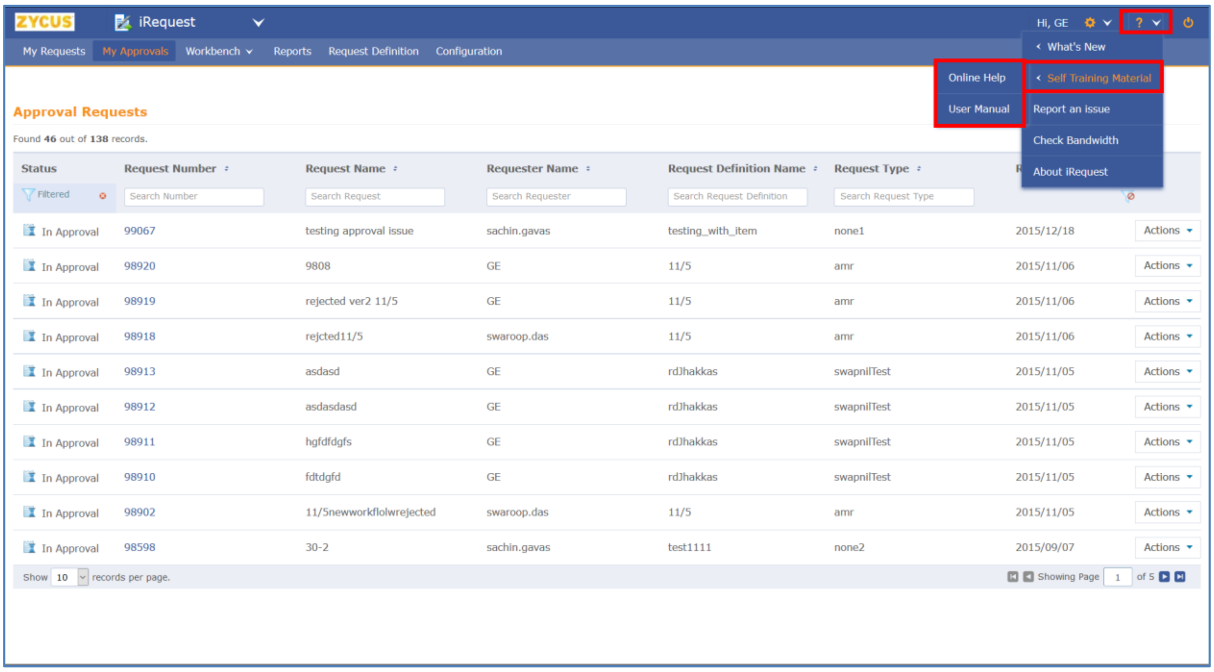


2. User Manual – A detailed explanation on how to use different features on the iRequest tool.

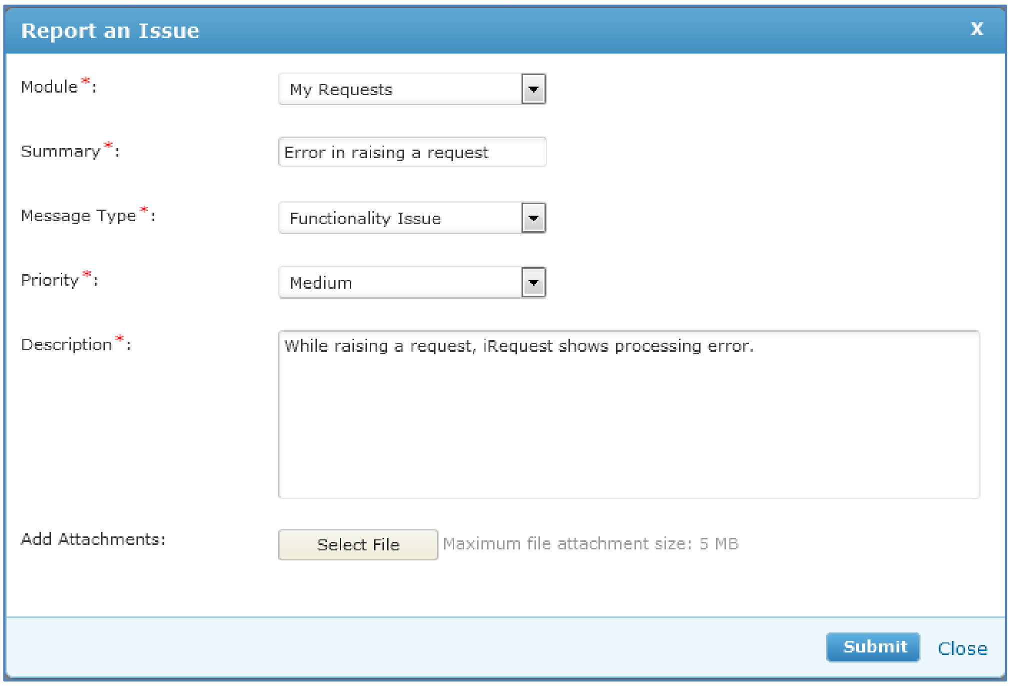
Help Menu > **Self Training Material** > **User Manual**

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

Help Menu > **Self Training Material** > **Online Help**



4. 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.

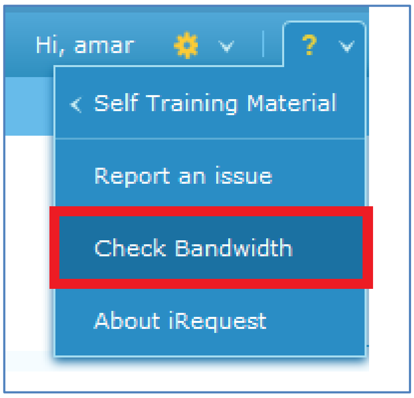


5. User can select from below options for fields provide with drop down lists for Reporting an issue:

Field	Options
Module	1. My Requests 2. My Approvals 3. My Workbench 4. Administration 5. Reports
Message Type	1. Feedback 2. Functionality Issue 3. Usability Issue 4. Performance Issue 5. Other
Priority	1. High 2. Medium 3. Low

3.3 Bandwidth Test

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

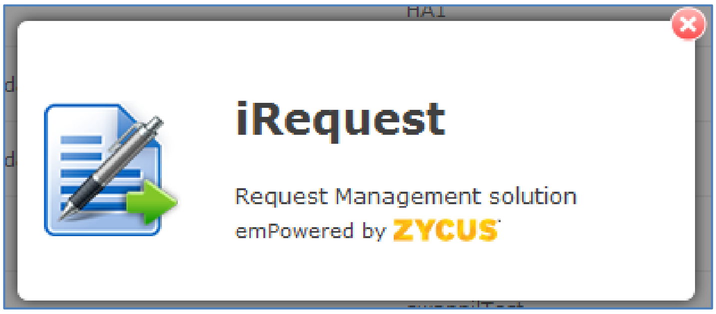


2. Click icon and click **Bandwidth Test** to check the bandwidth of the internet connection. The internet bandwidth rating is displayed as Good / Bad.

3. The bandwidth grades are as follows:

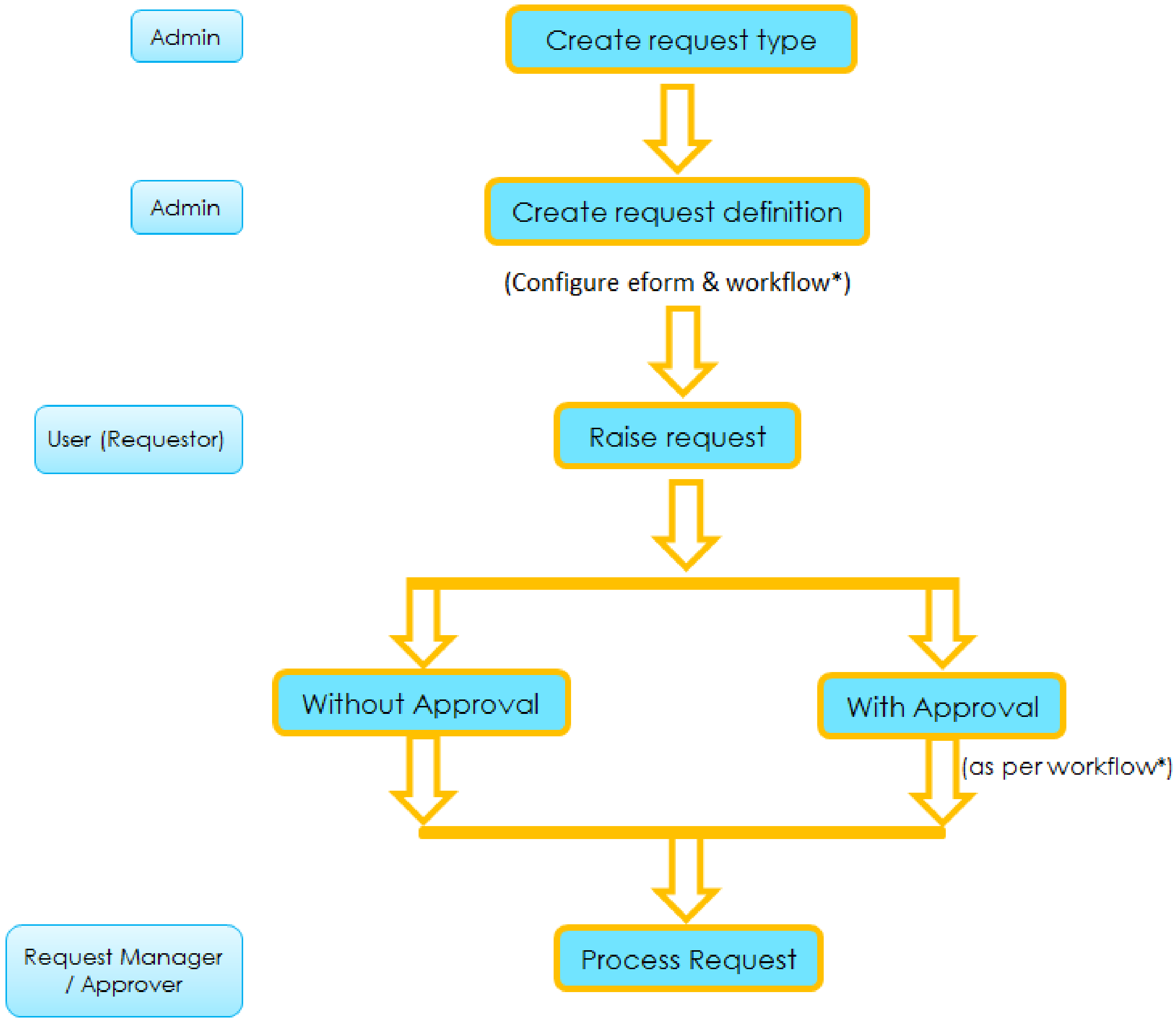
- Low - less than equal 1 mbps (megabits per second)
- Average - 2-5 mbps
- Good - greater than 5 mbps

4. 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.

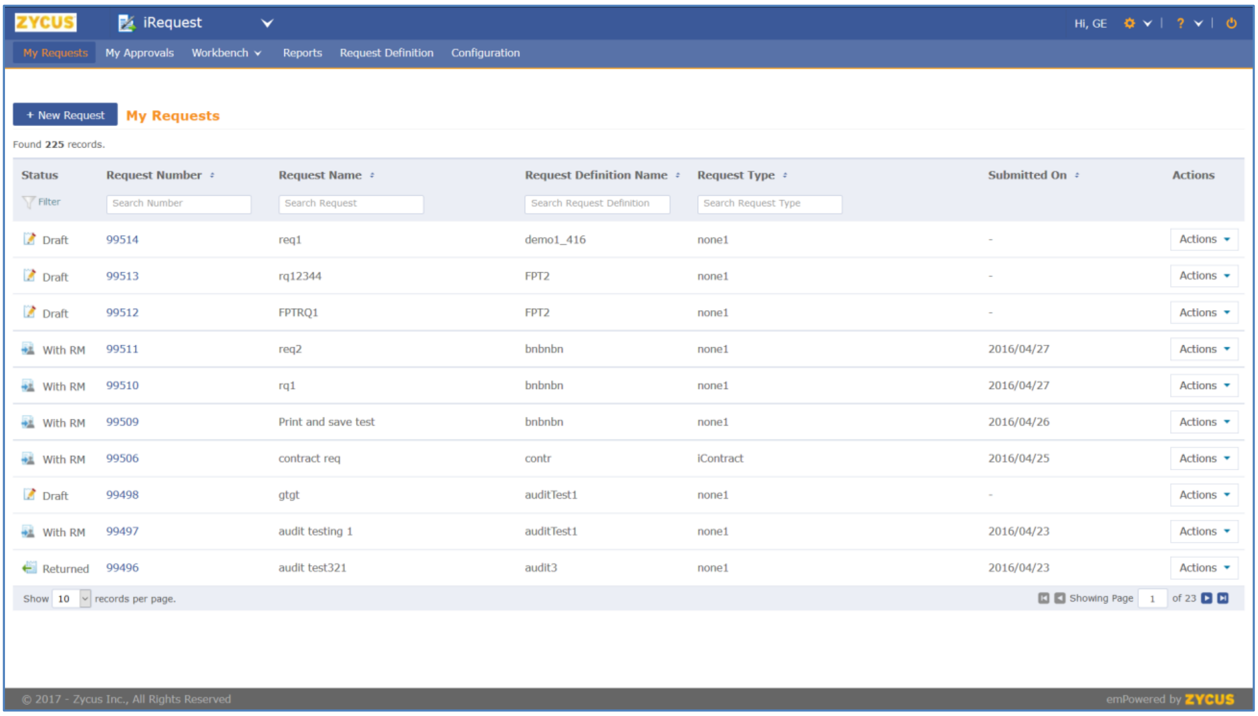
The Requestor raises the request with appropriate request definition. To raise a request, request type for request definition is a must to be associated.

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.

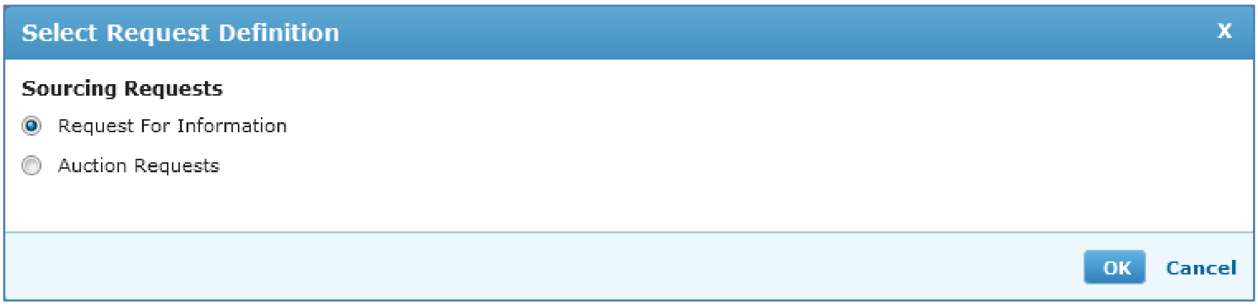


Using requestor's credentials login to iRequest. Click **My Requests** and then click **+ New Request**.

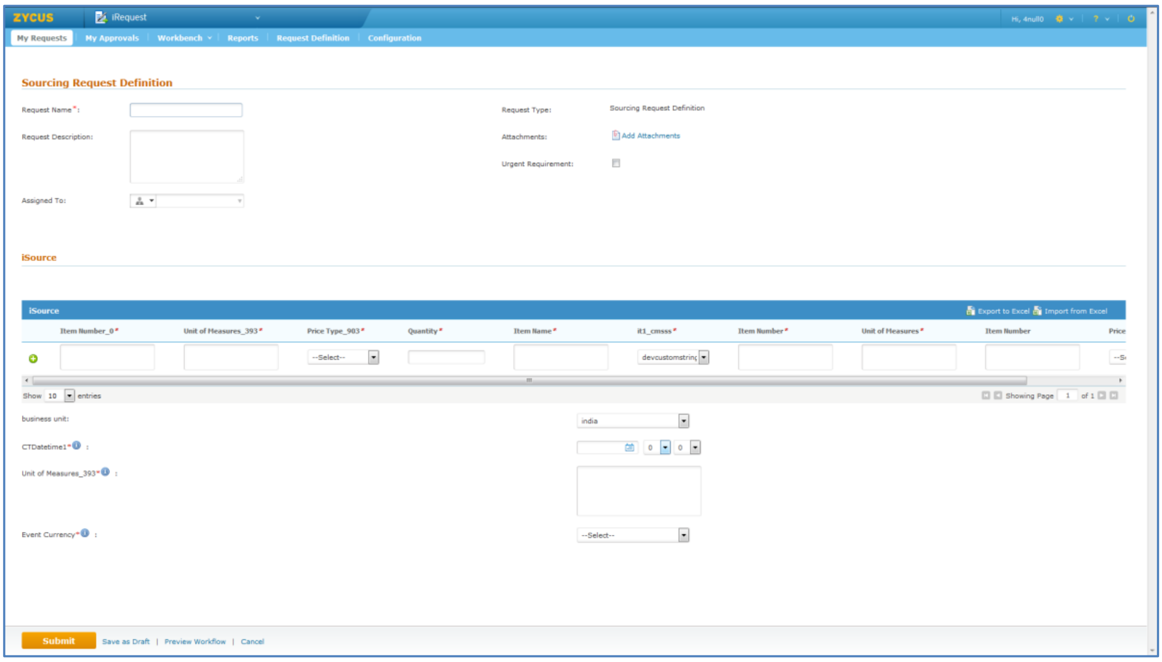
The **Select Request Definition** window displays the

Request Type (Sourcing, Contract, or iManage Requests)

Request Definition



Select 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**.

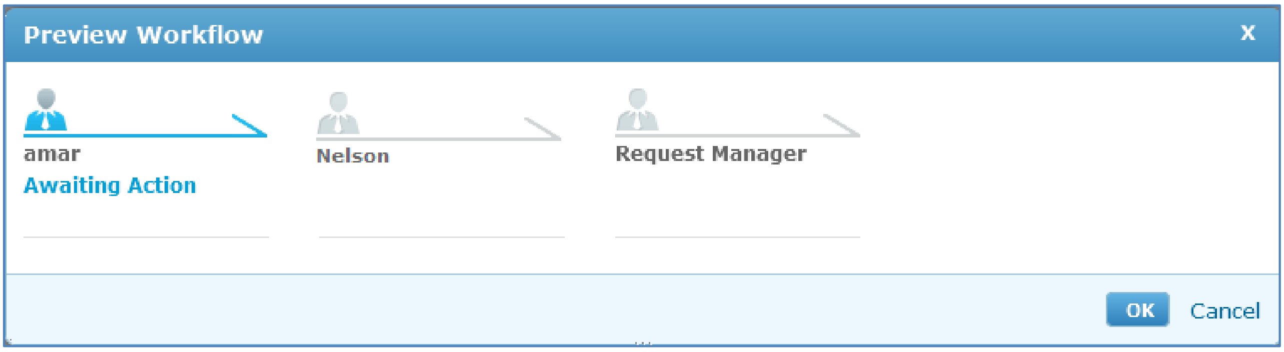
Select the Request Manager from the **Assigned to** drop down list. The request can be assigned to a single user (Request Manager) or a group.

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

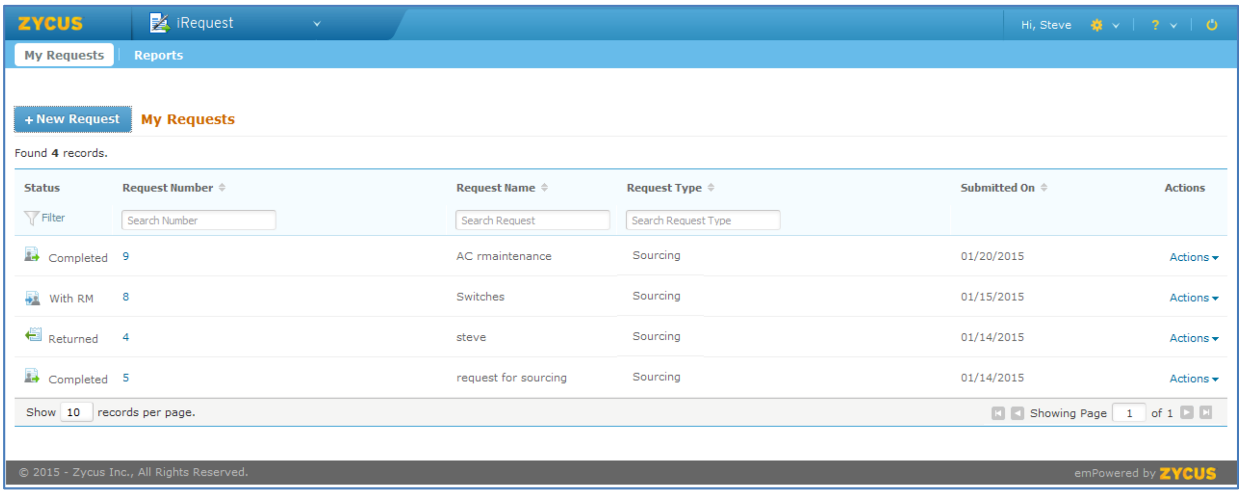
Select the **Urgent Requirement** check box if the request to be raised is urgent. The request marked as urgent is reflected with a red exclamation mark under **My Requests**.

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.

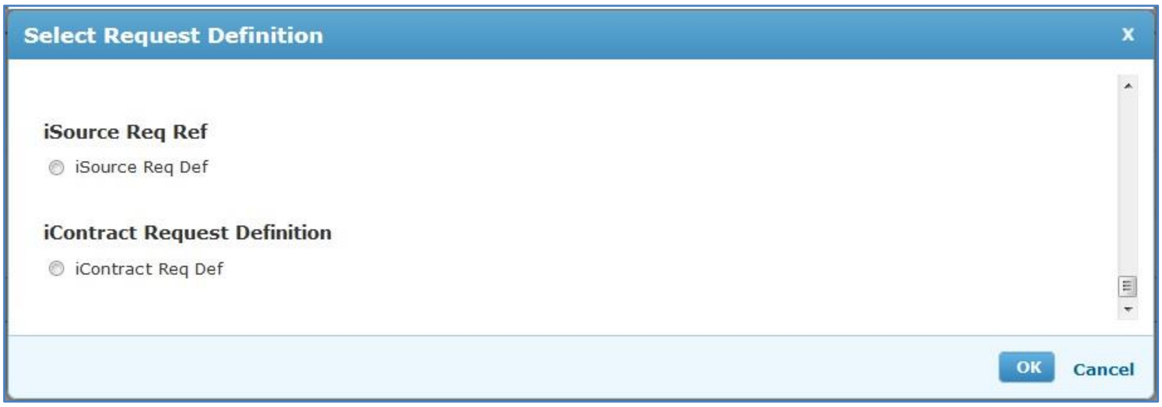


iRequest lists the requests under My Requests page (depending on the workflow configuration) for the Request Manager as shown below.

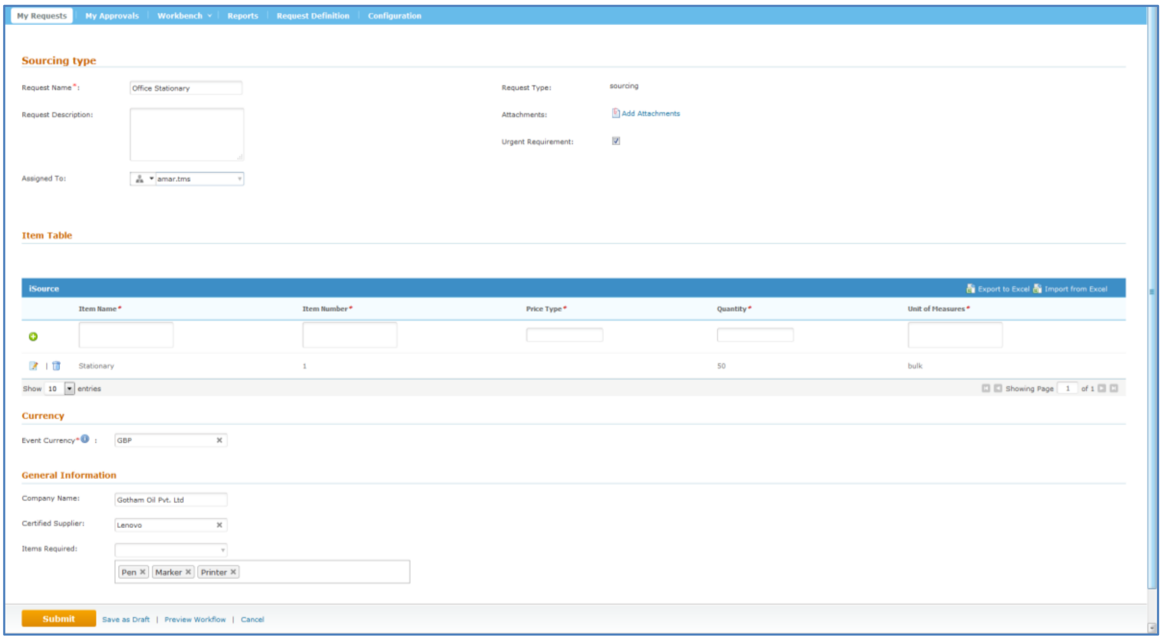


5.1 Sourcing Request

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



2. You will be redirected to following page:

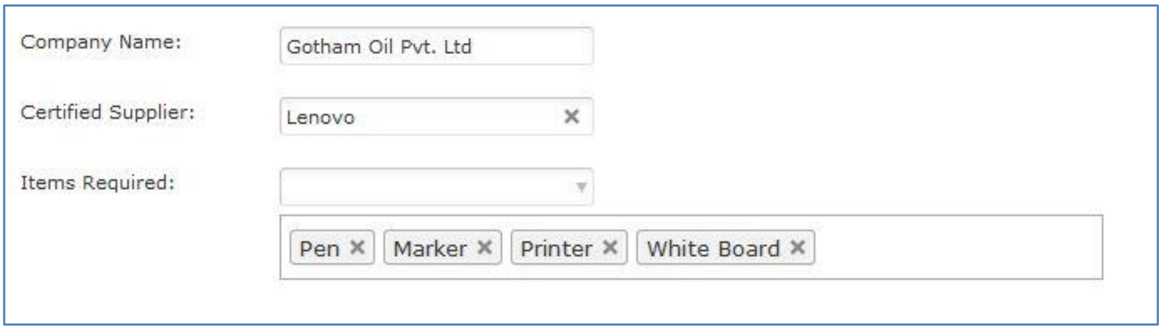


3. You can notice the **Request Type** as **iSource** in the web form.

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.

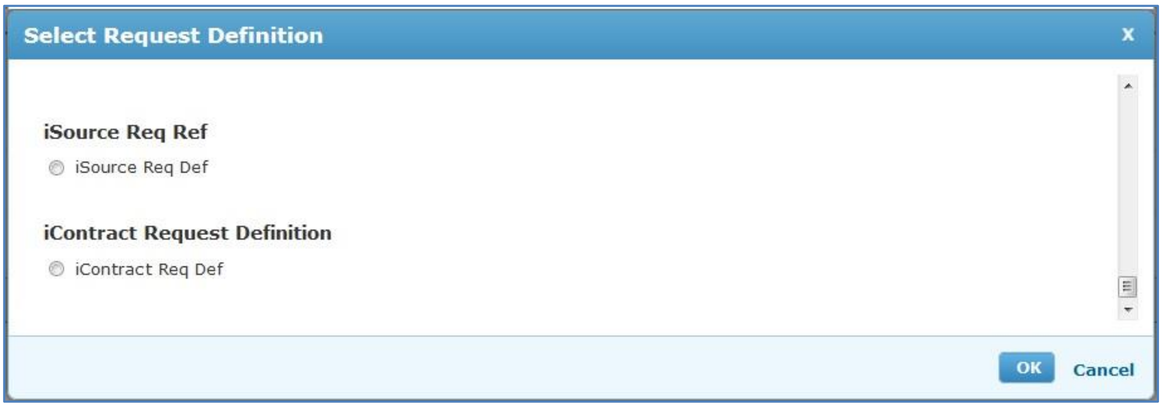
5. The **Dropdown** and **Multi-select** menu will allow adding and removing the options by typing them in the search box.



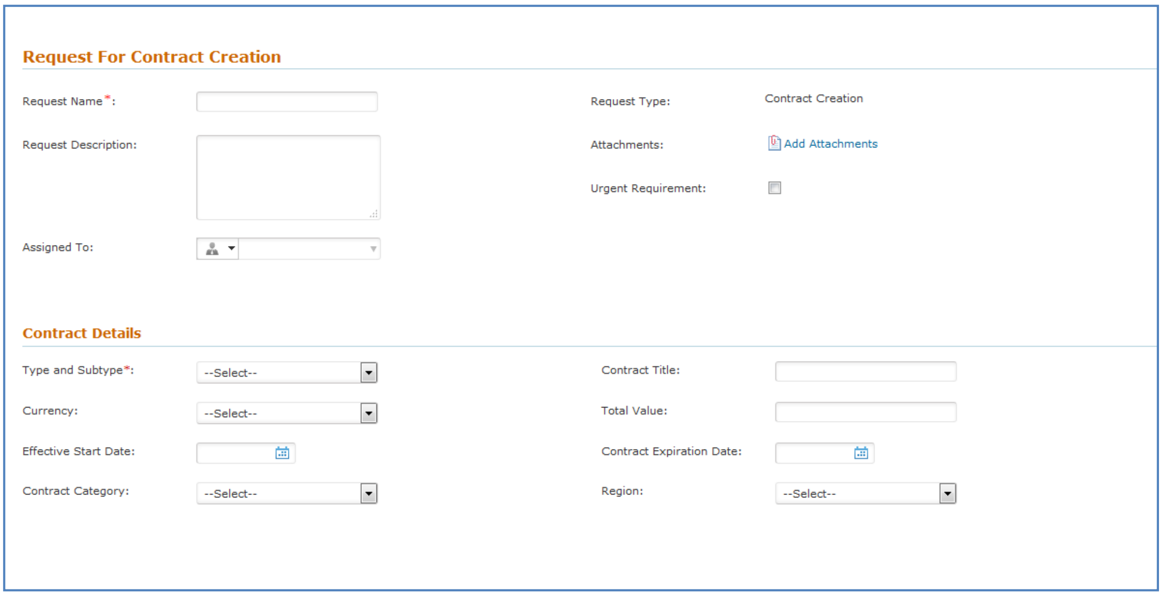
6. You can remove a selected element by click the **X** mark against that element.
7. Enter all the Line Item details in the Line Items panel.
8. Fill in all the details and click on **Submit**. The request will be listed on you **My Requests** page.

5.2 Contracts Request

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



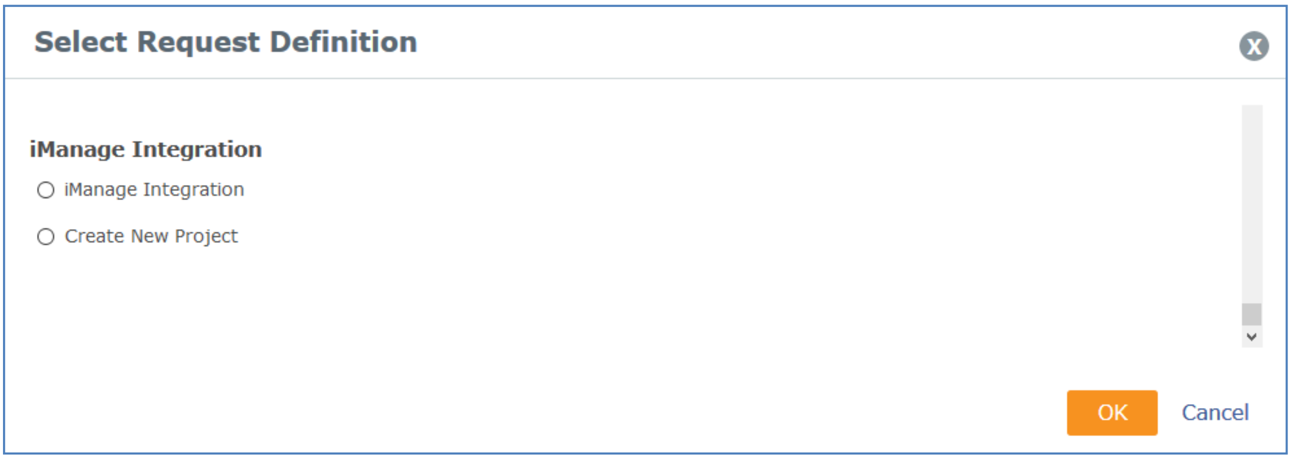
2. You will be redirected to following page:



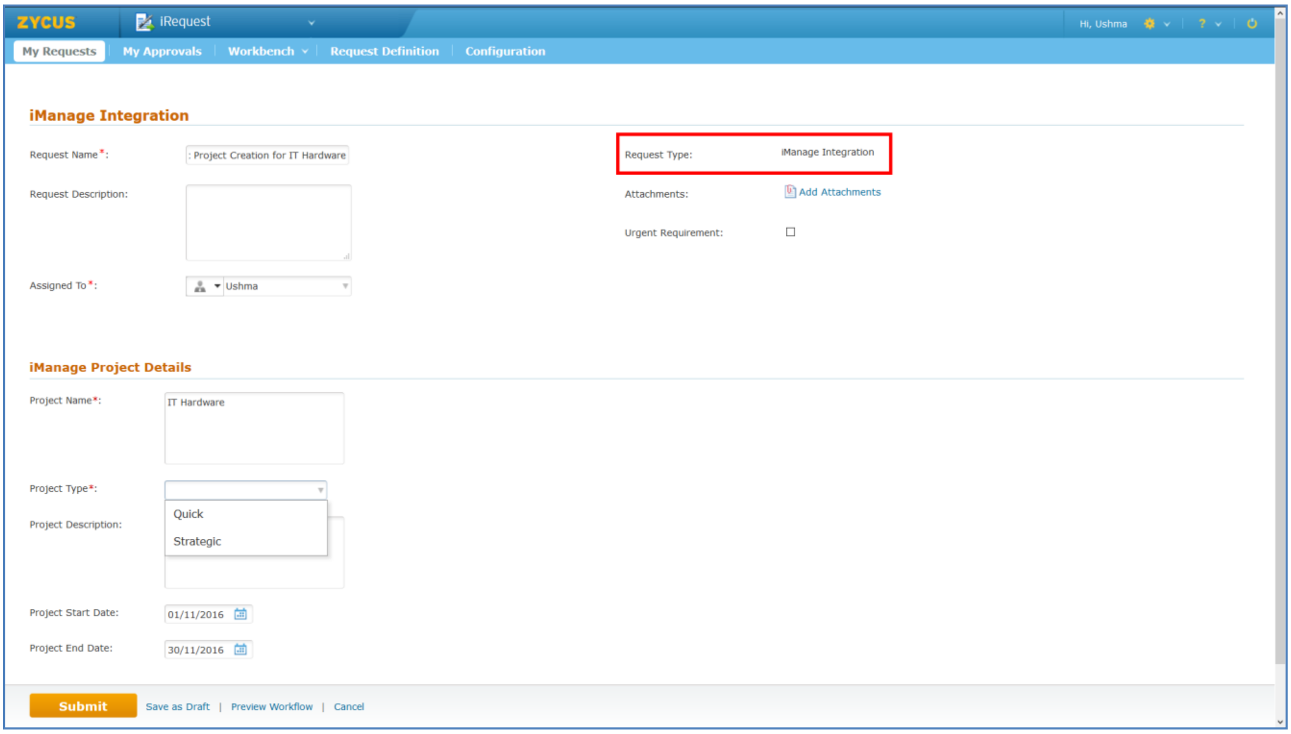
3. You can notice the **Request Type** as **iContract** in the web form.
4. Fill in all the details and click on **Submit**. The request will be listed on you **My Requests** page.

5.2 iManage Request

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



You will be redirected to following page:



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

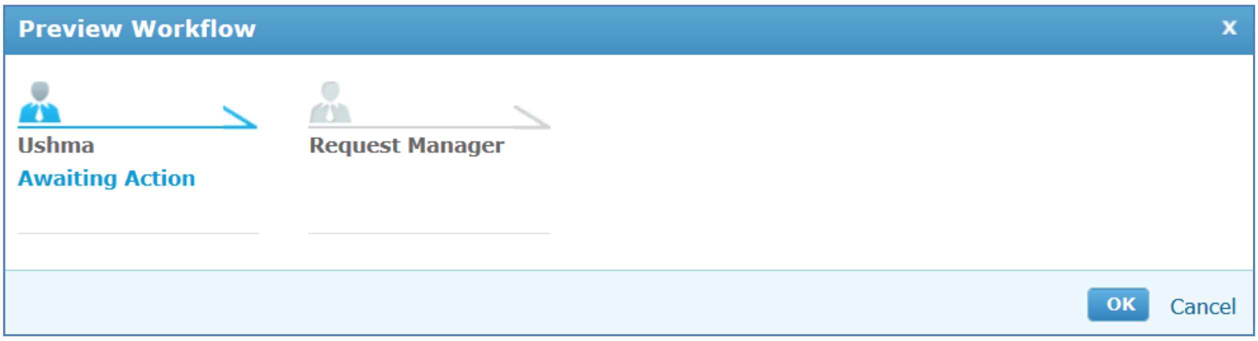
Enter a Request Name and Description.

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 you **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:

a. Requirement gathering

b. Get supplier quotes

c. Finalize supplier

d. Contract with supplier

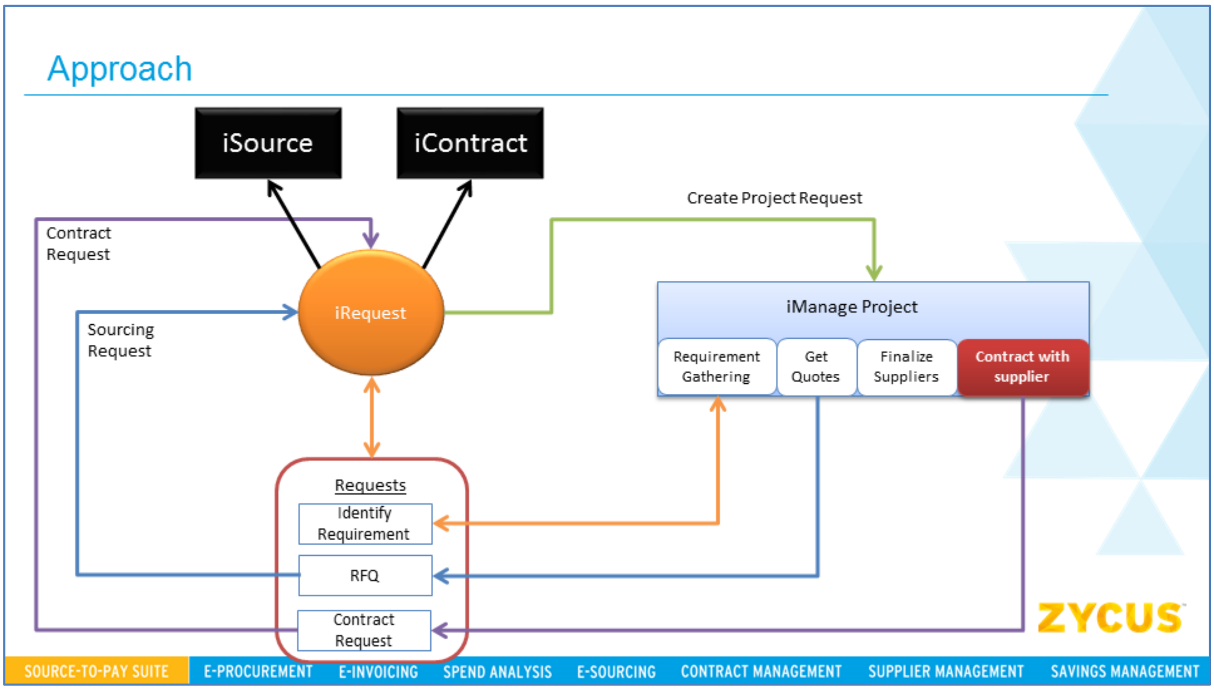
Consider that in this case the project manager does not have the required access to get into the sourcing or contracting activities. Also consider that the sourcing manager may not have access to iManage module.

1. 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.

2. 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.

3. Post the identification of quotes, project manager can finalize the suppliers based the information available.

4. 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.

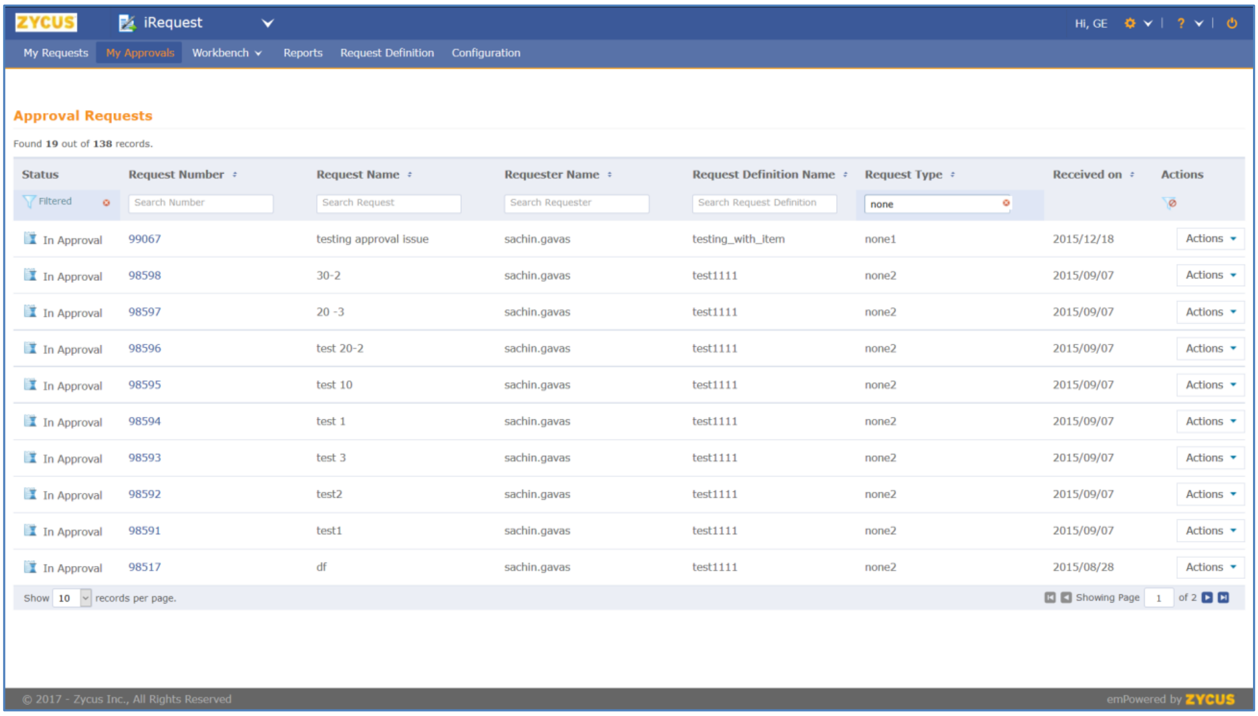


Note: This functionality will allow project managers to streamline process of assigning requests.

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.

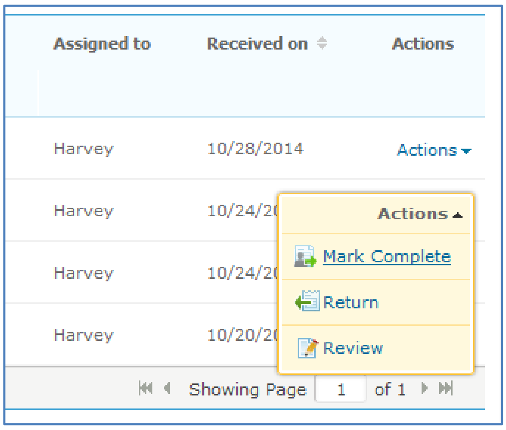


Note: *Any request raised by a supplier through Zycus Supplier Network (ZSN) will be visible on this page for approval.*

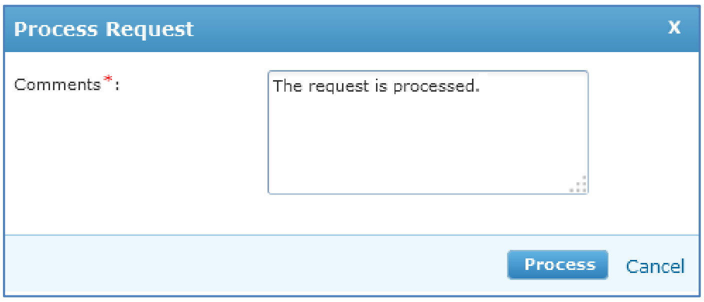
6.1 Processing Requests without approval

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

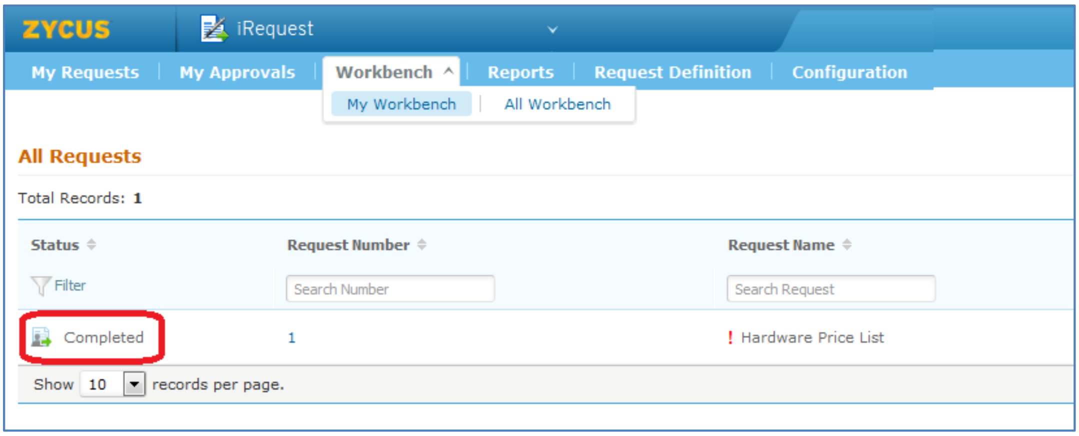
Click **Actions** against the appropriate request entry under **All Requests**.



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



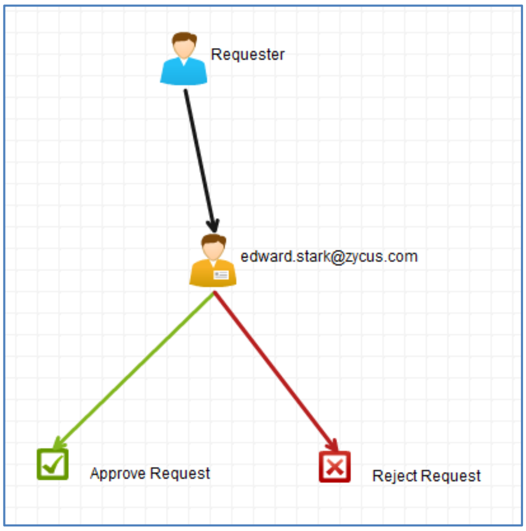
The **Status** changes from **With RM** to **Completed** as shown below.



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:

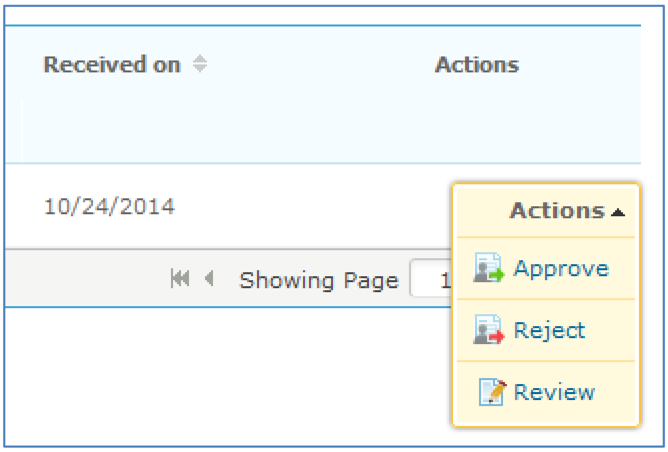


The requester raises the request with its request type definition.

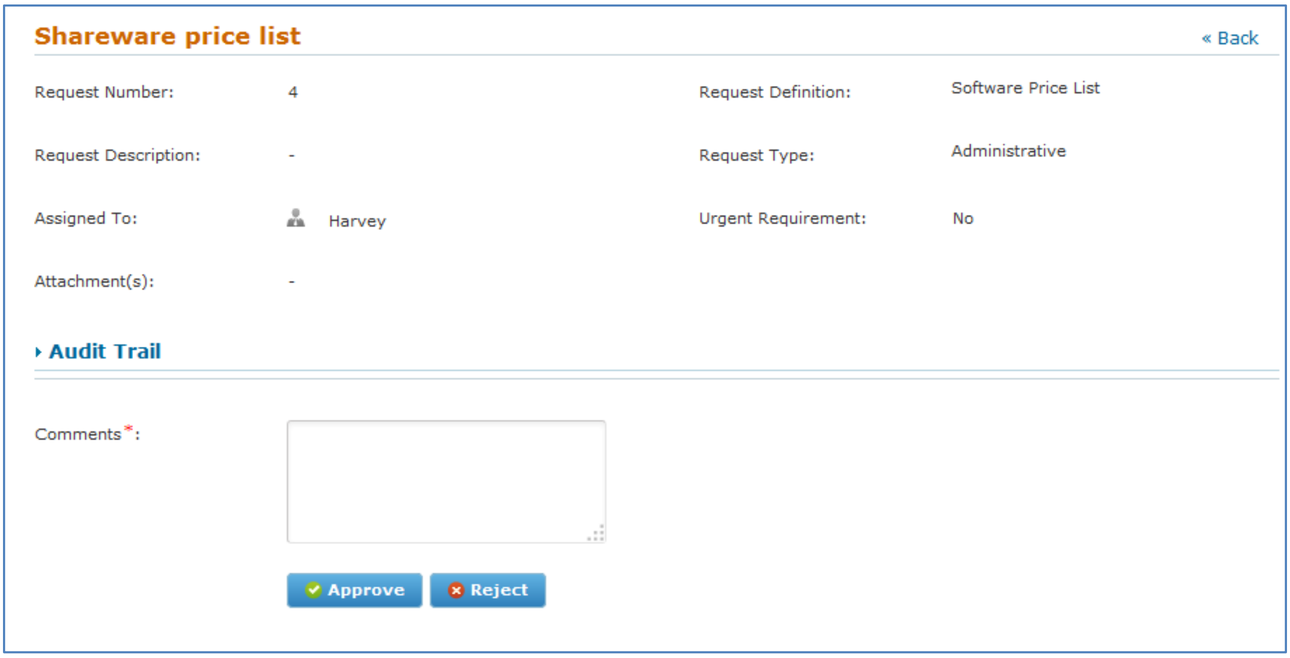
The request as per the workflow is sent to the approver (edward.stark@zycus.com) for approval. The workflow can be designed with multiple such approval steps, being processed by all the consecutive approvers.

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.



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

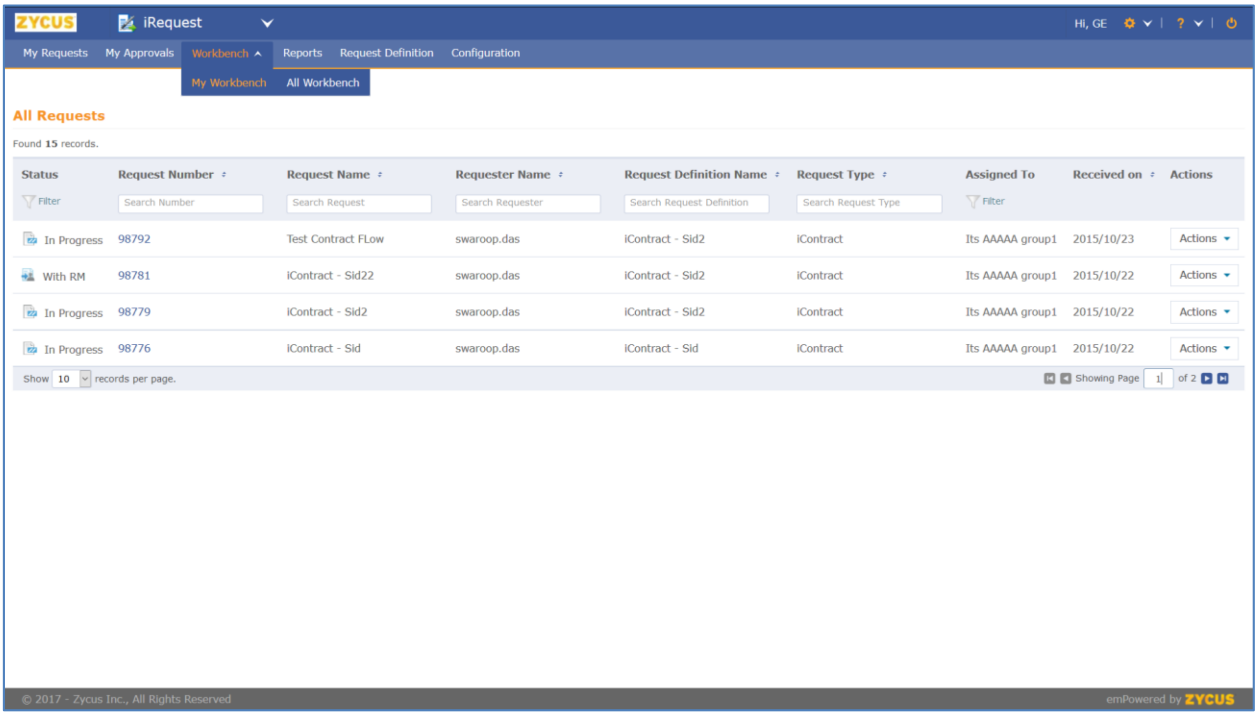
The workbench section is divided into My Workbench for Request Manager and All Workbench for Super Request Manager.

7.1 My Workbench

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

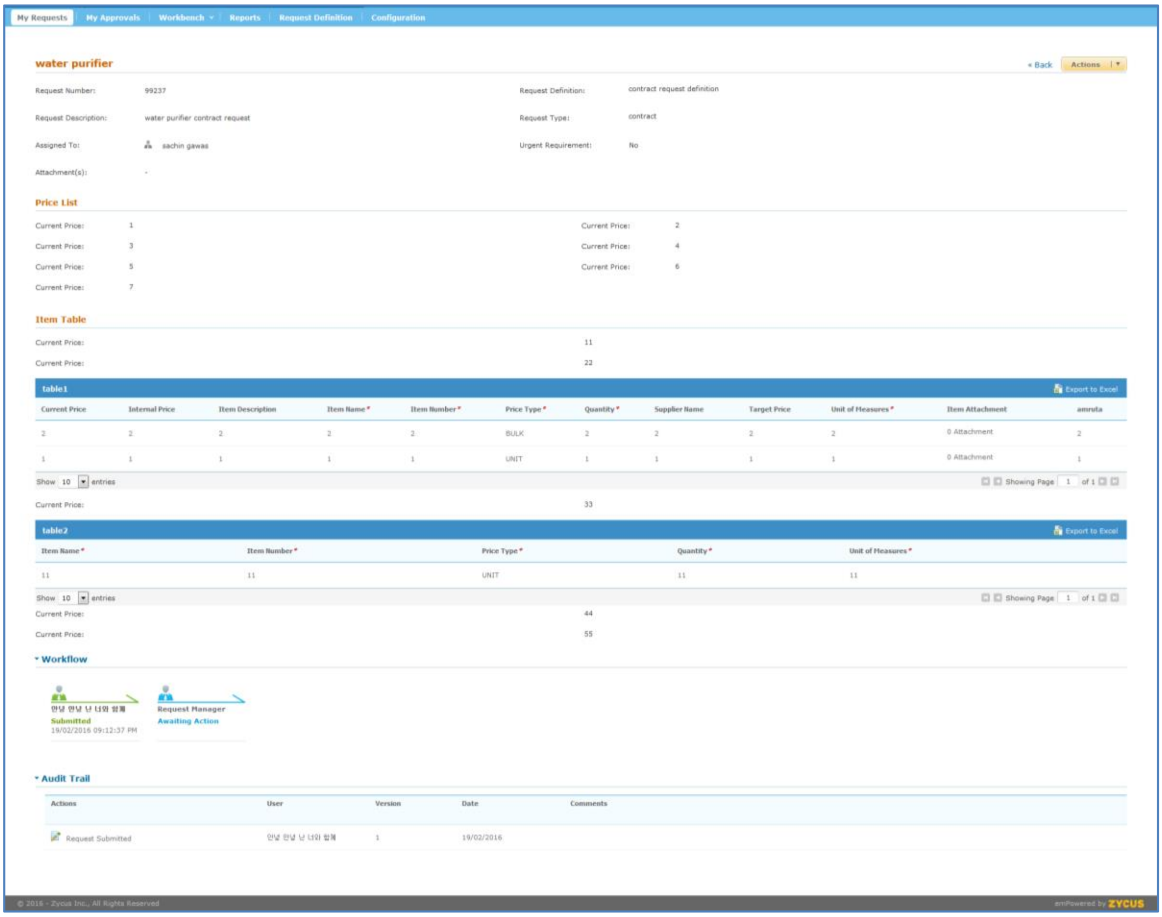
- Status
- User can filter from the Statuses for the requests. The filter options are:
  - With RM
  - In Progress
  - Returned
  - Completed
- Request Number
- Request Name
- Requester Name
- Request Type
- Assigned To
- Received on
- Actions

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**.



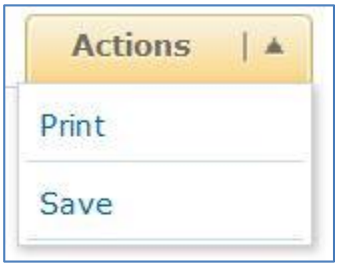
***Note:** Request raised by suppliers will be available on this page to take further actions by the RM.*

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

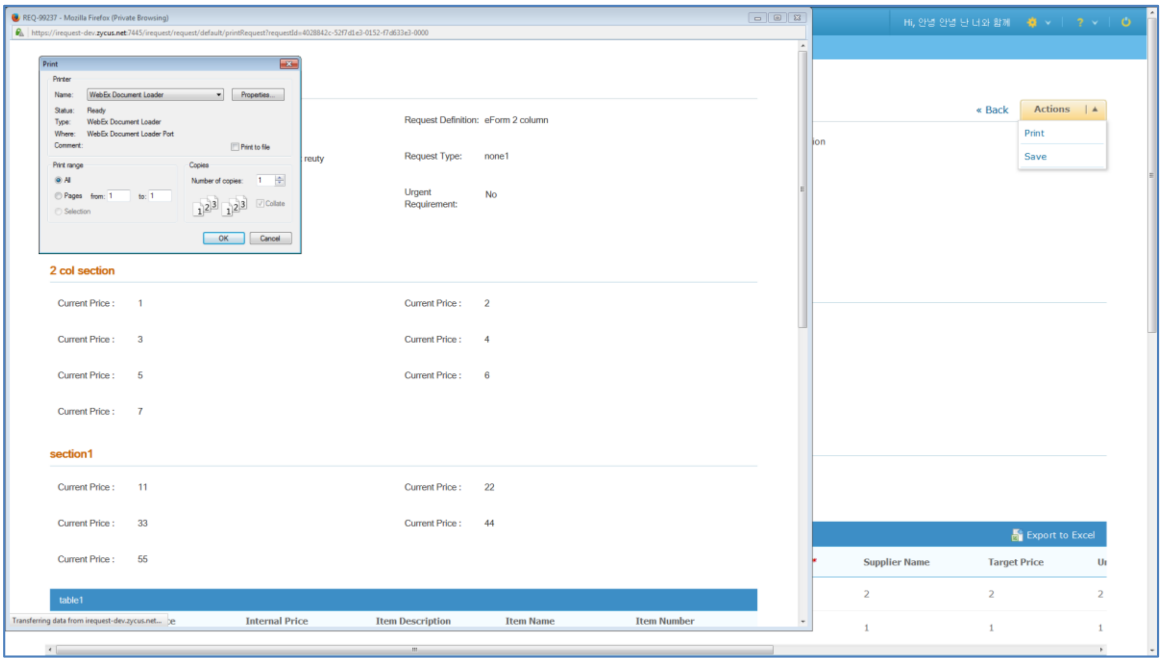


Click **Export to Excel** to download the item table template. User can populate this template to upload items in bulk into the Item table using **Import from Excel** functionality.

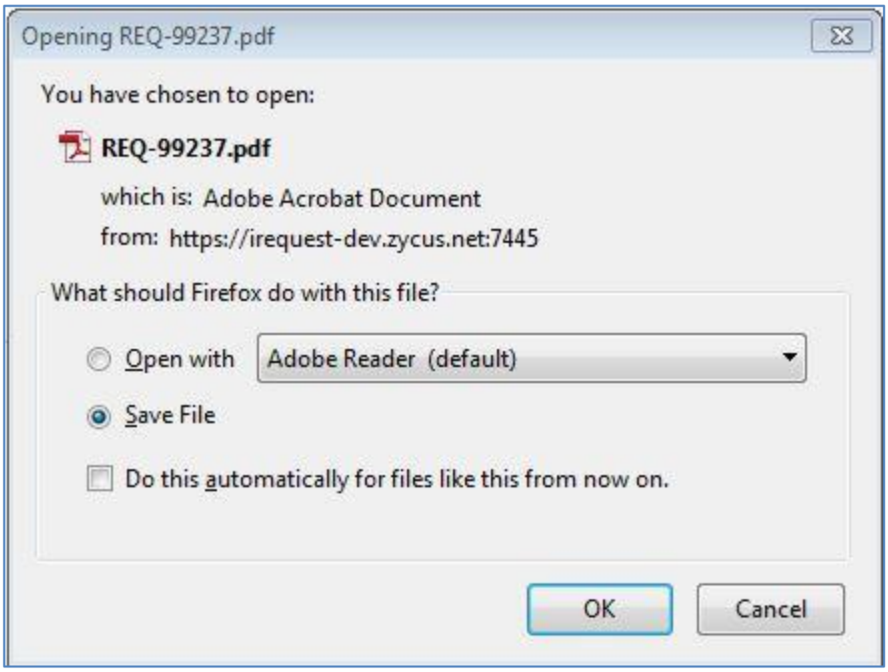
Click the **Actions** menu on top right corner. You will have an option of **Print** and **Save**.



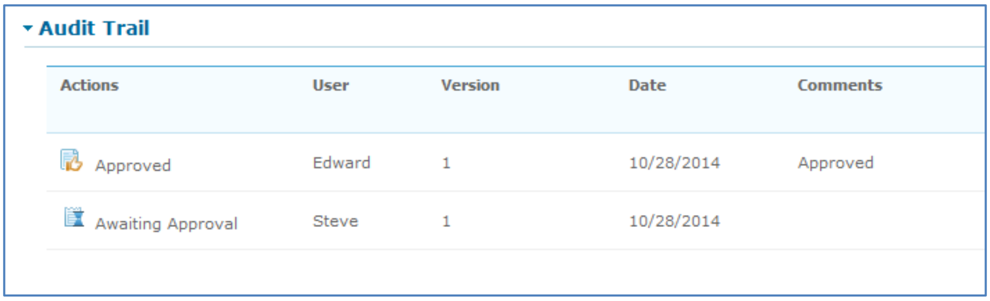
When you click on **Print**, print dialog box will appear in new browser tab.



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.



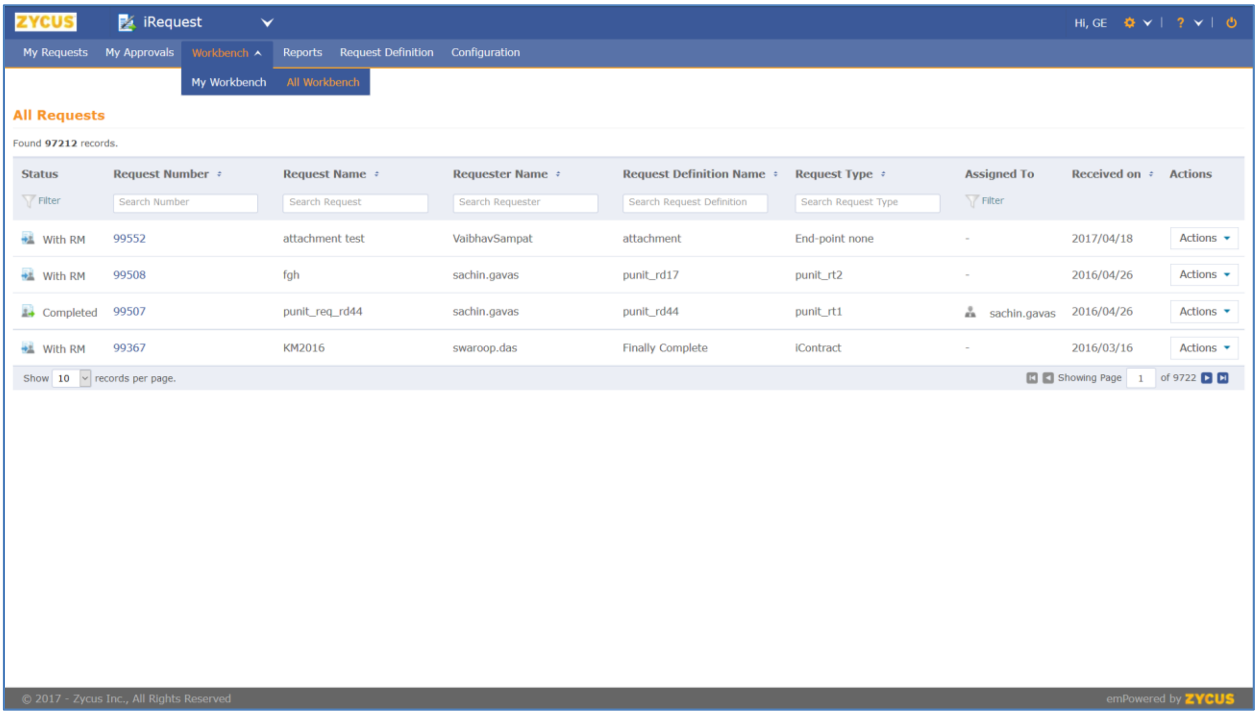
Audit Trail

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.



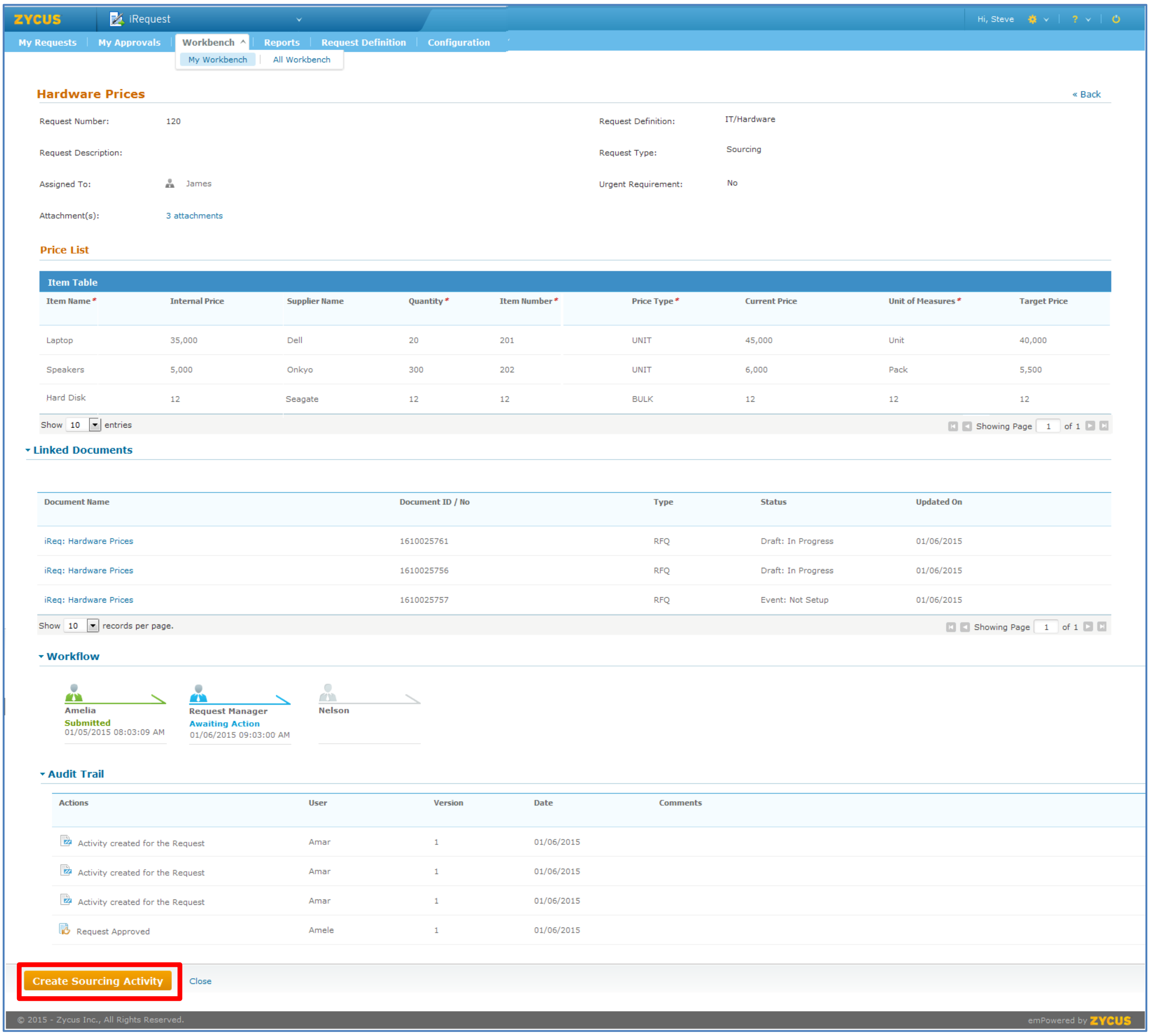
***Note:** Request raised by suppliers will be available on this page to take further actions by the Super RM.*

For requests, the Super RM can perform following actions:

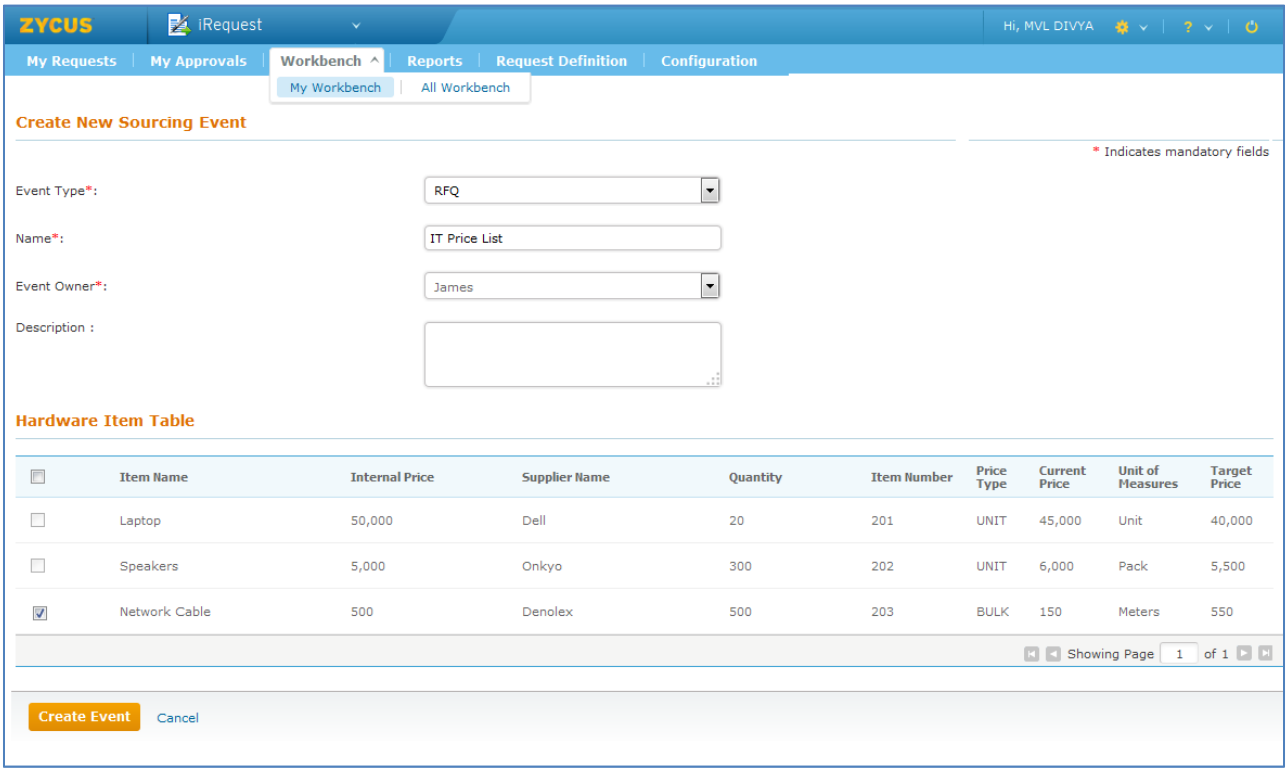
- Mark Complete
- Return
- Review

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.

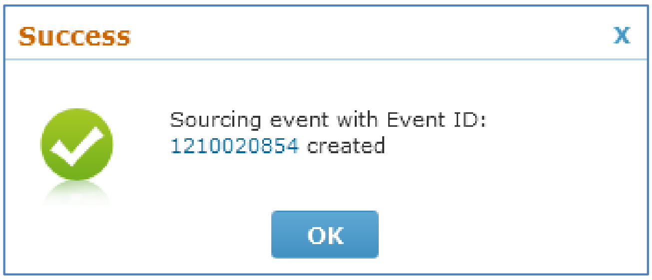


1. Click **Create Sourcing Activity** to initiate event creation.

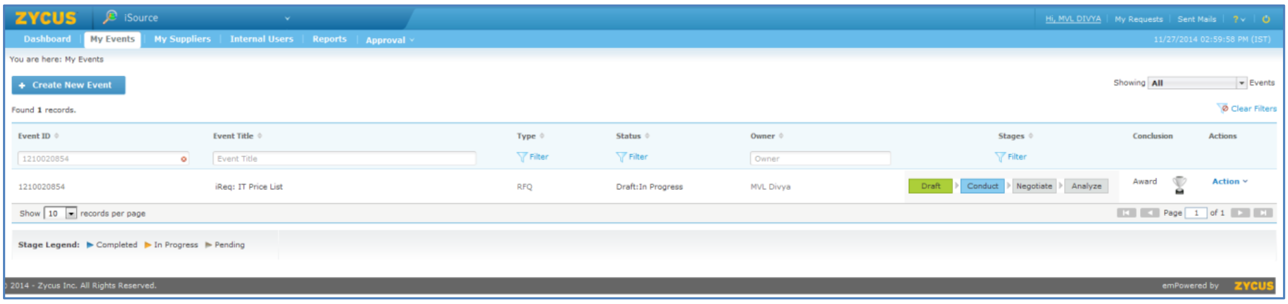


2. Select the **Item(s)** to be sourced and click **Create Event**.

3. iRequest displays the confirmation window with the event ID as shown below:

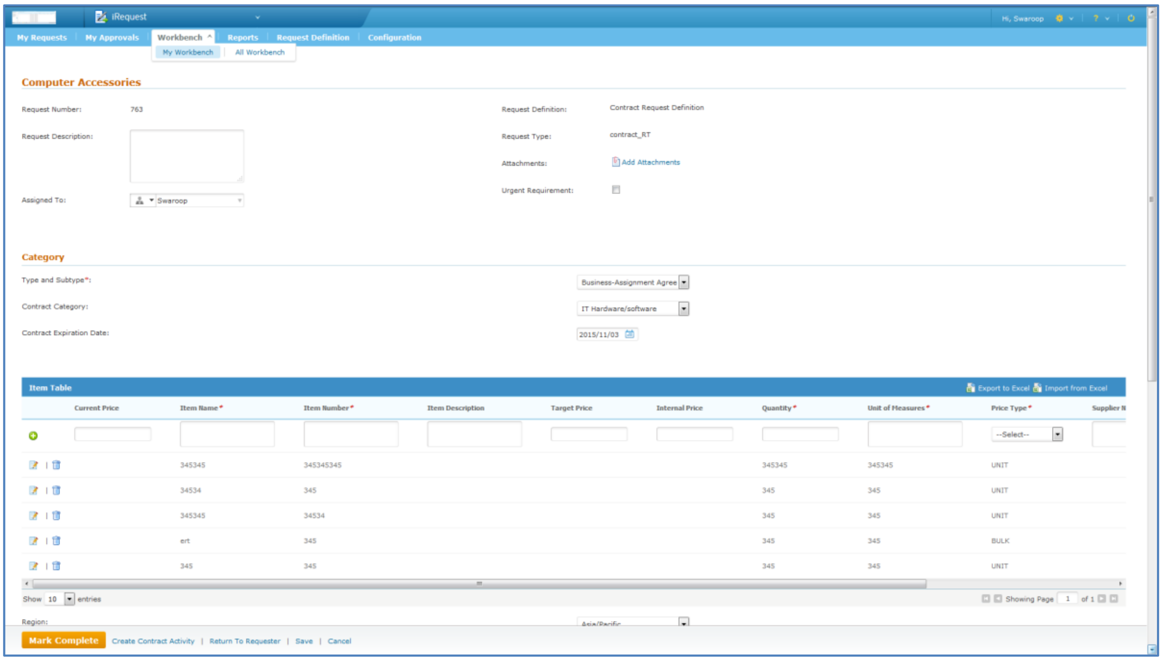


4. This **Event ID** is hyperlinked to **My Events** in iSource. Click **OK** to continue in iRequest or click on the **Event ID** to enter event details in iSource as shown below.

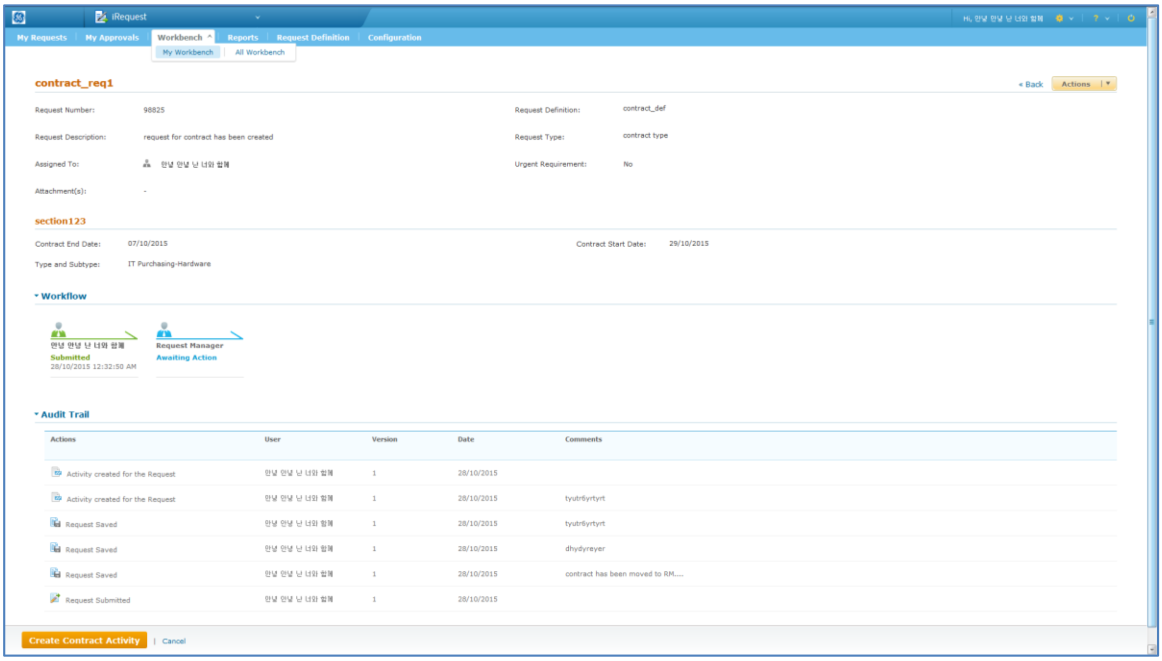


7.4 Create Contract

1. 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

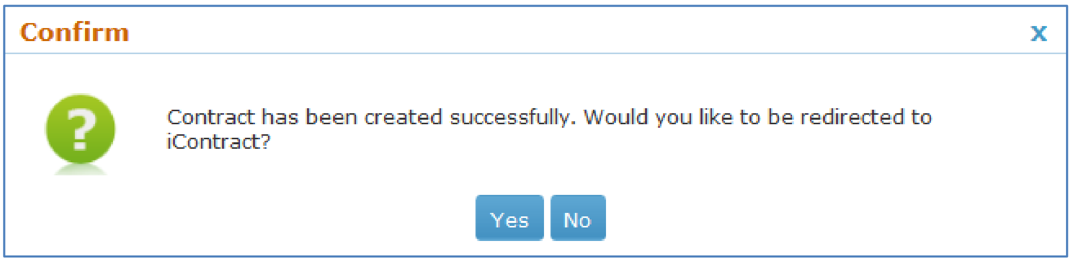


2. You will be redirected to the following page:

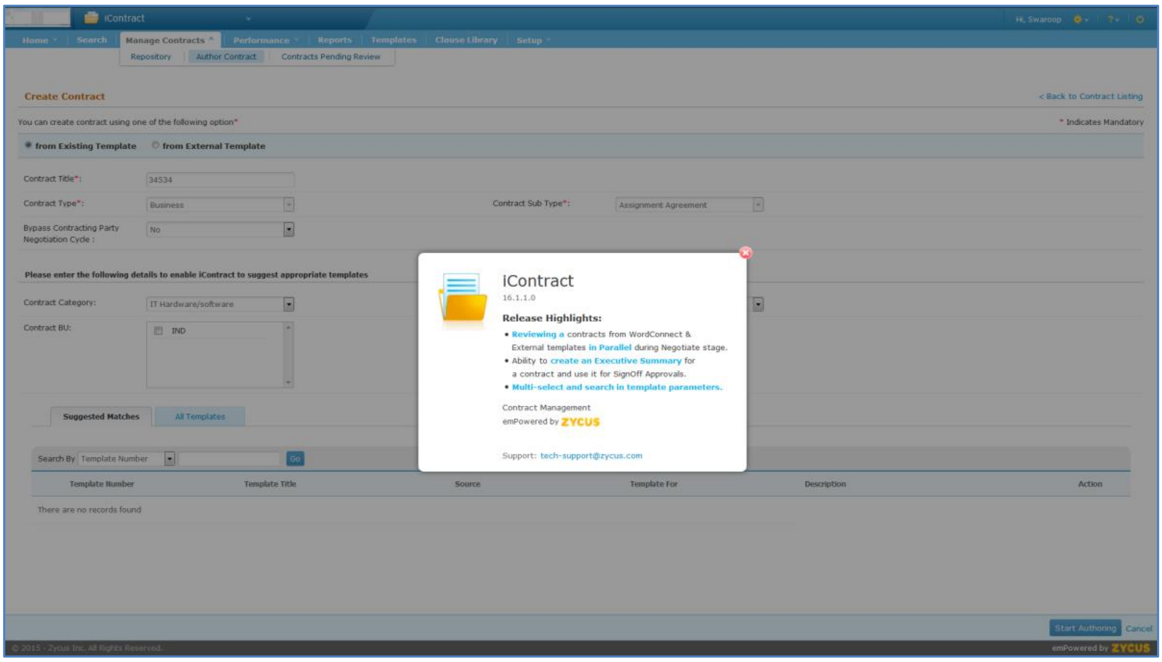


3. Select the contract owner and click on **Create Contract.**

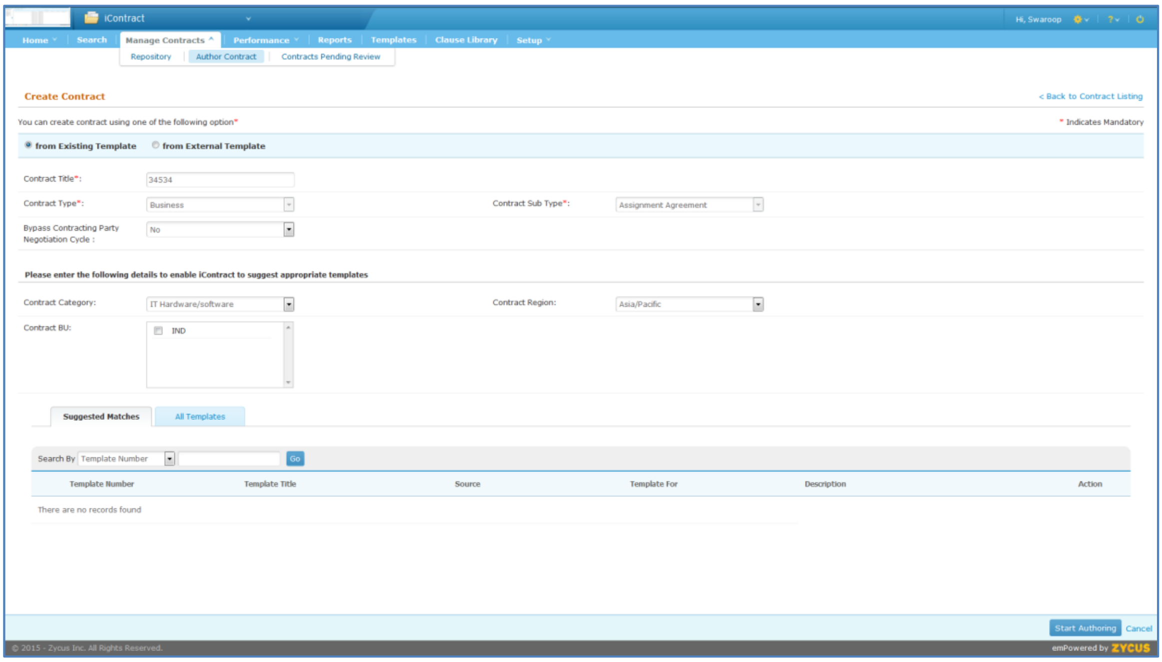
4. You will get following popup:



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



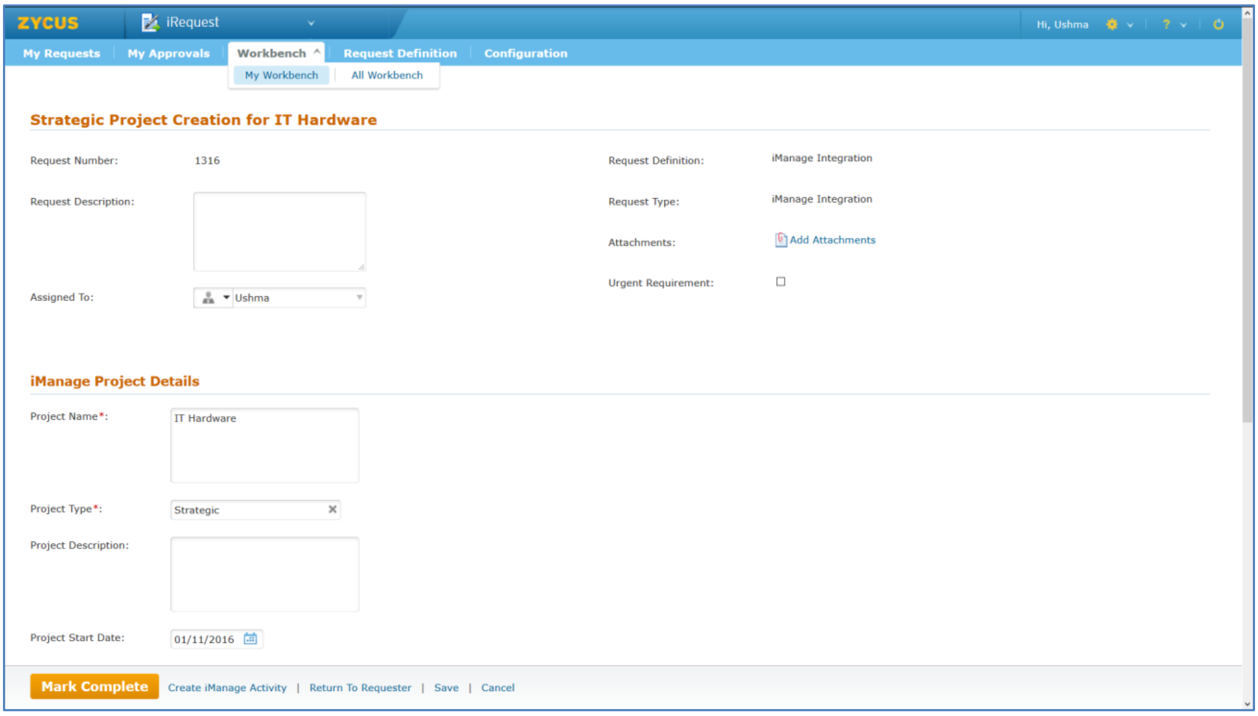
6. You can fill up the details and start authoring the contract and take it up till signing off stage.



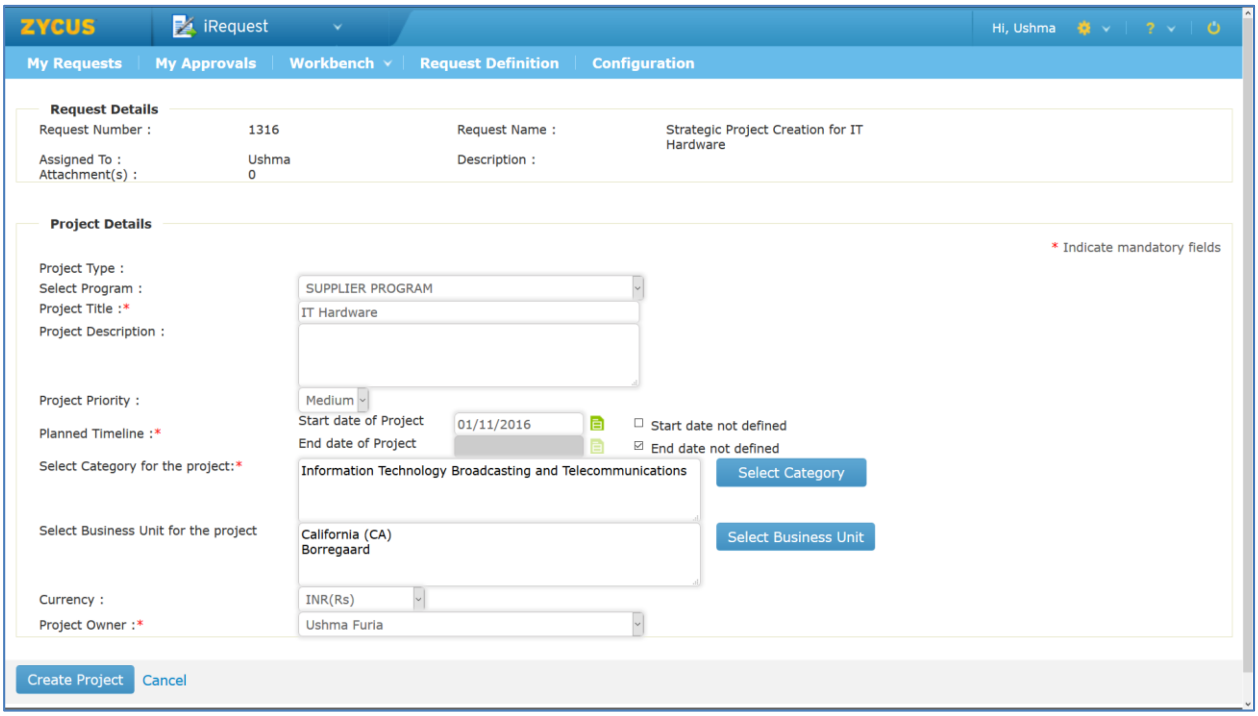
7. Select the required fields and click on **Start Authoring**.

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:

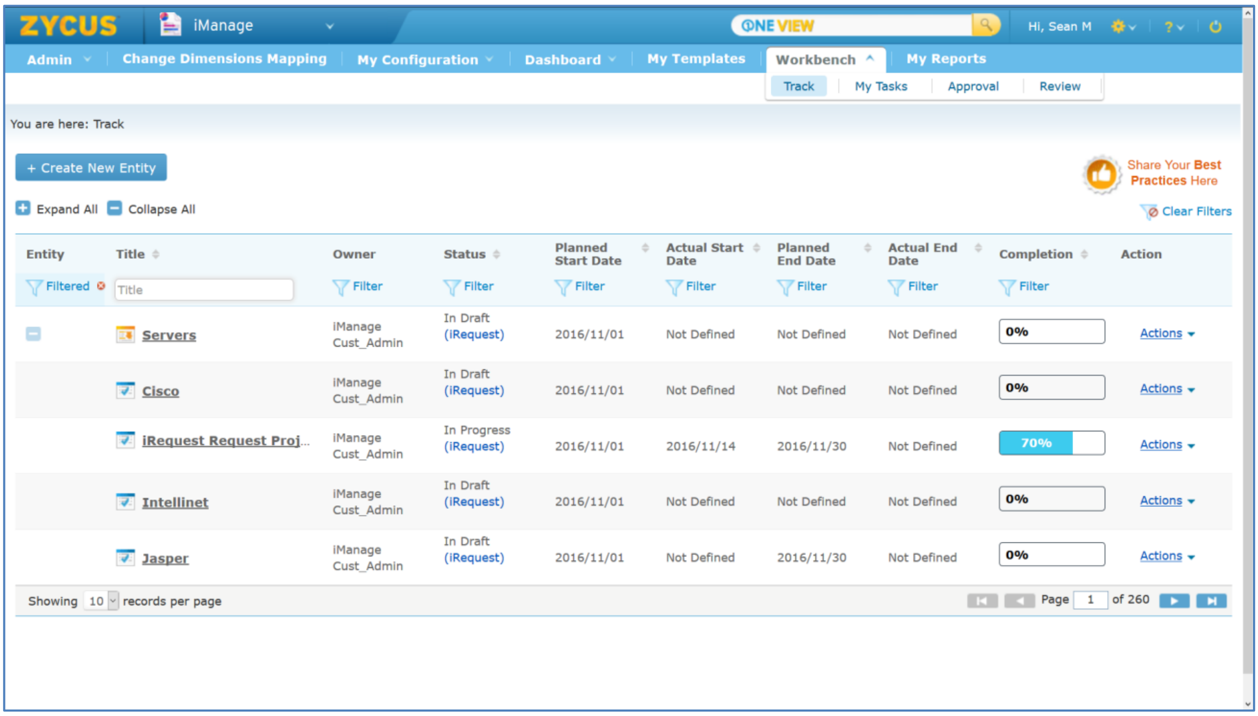


5. As a Request Manager, you can add/modify Request Description, Attachments.
6. You can change Project Name, Project Type, Start and End date.
7. Once you edit the details, click **Create iManage Activity**, a project will be created in iManage in **draft** stage. You will be navigated to the **iManage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

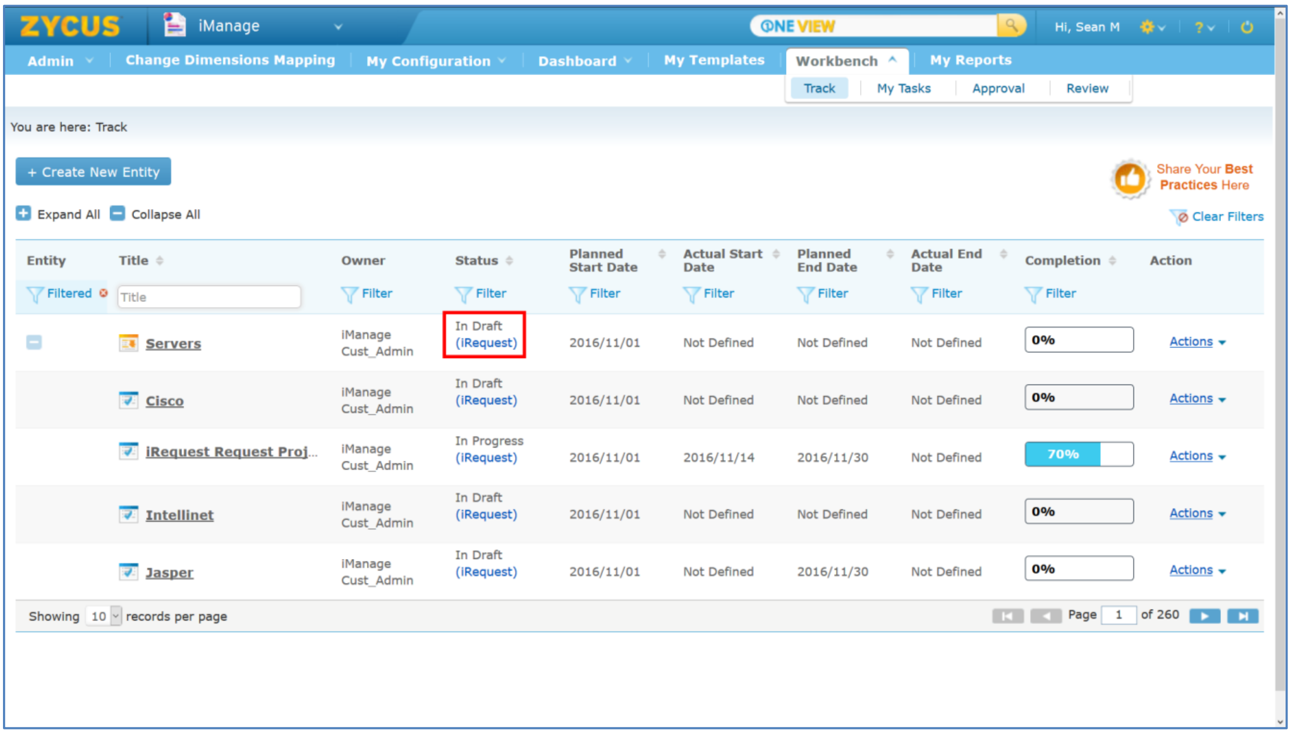


Note: You will not re-route to iManage. The iManage project page will open in iRequest.

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:



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

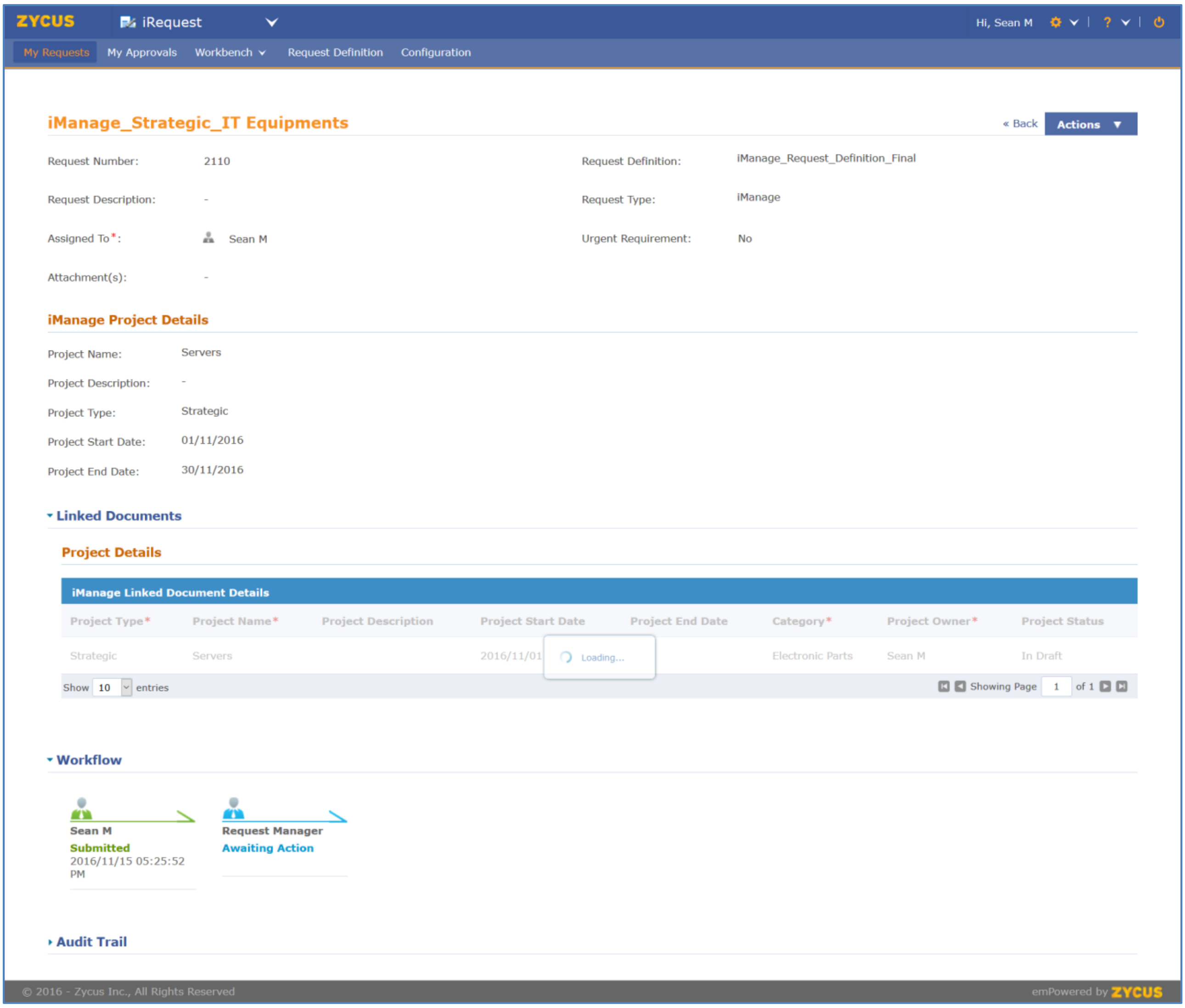


13. The project created from iRequest will be hyperlinked with tag **"(iRequest)"** *(highlighted in the image above)*.

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:

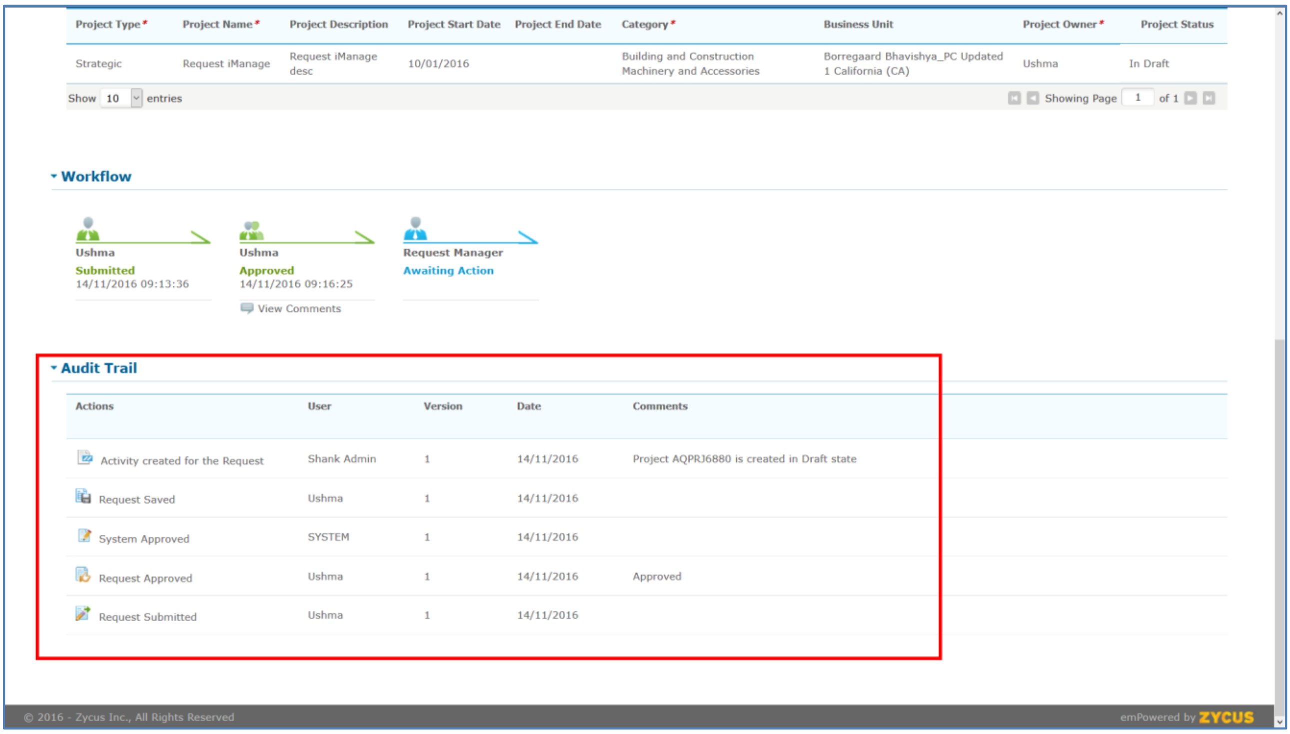
16. In case, if the project is **Strategic Project**:



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
Ushma
Submitted
14/11/2016 09:13:36
Ushma
Approved
14/11/2016 09:16:25
View Comments
Request Manager
Awaiting Action
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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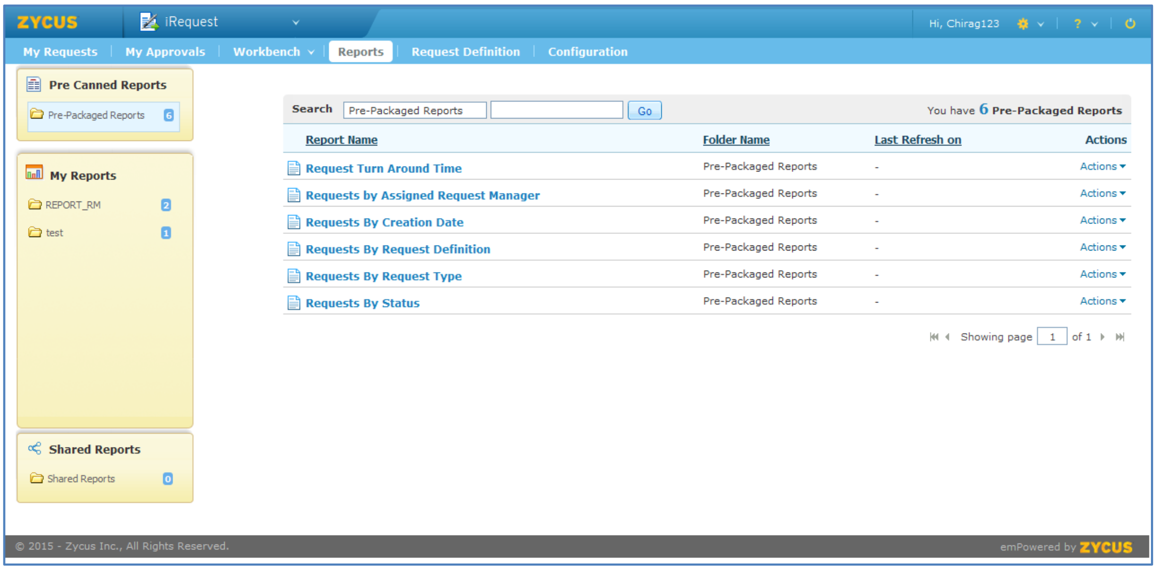
Chapter 8: Reports

iRequest provides two types of reports for users viz.

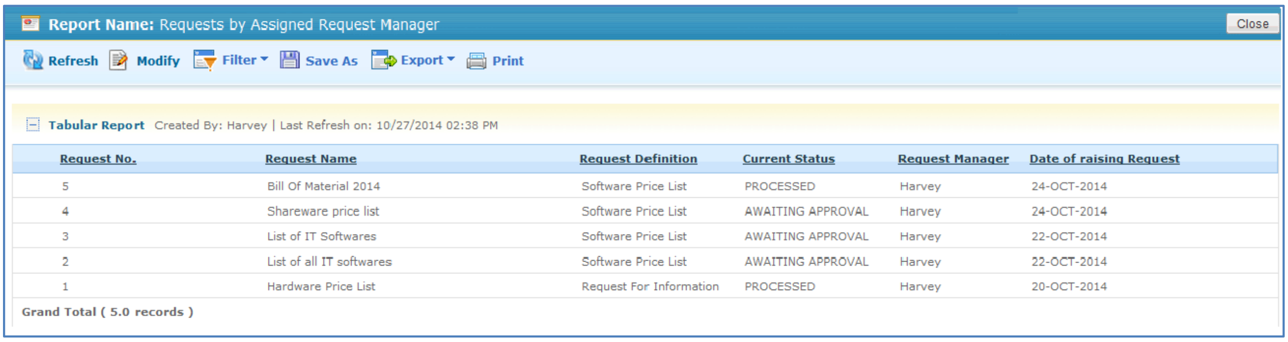
- **Pre-Canned reports**

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.



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.

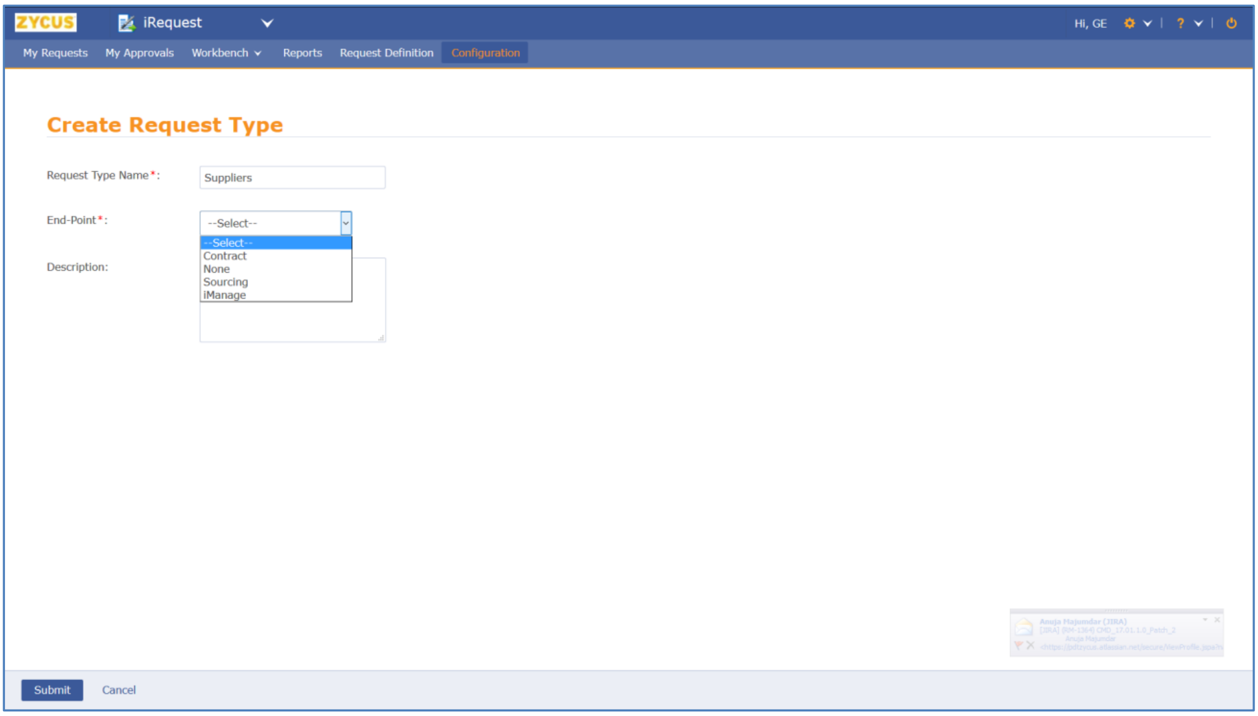
9.1Creating Request Type

5. To create a new request type, click **Configuration** tab.

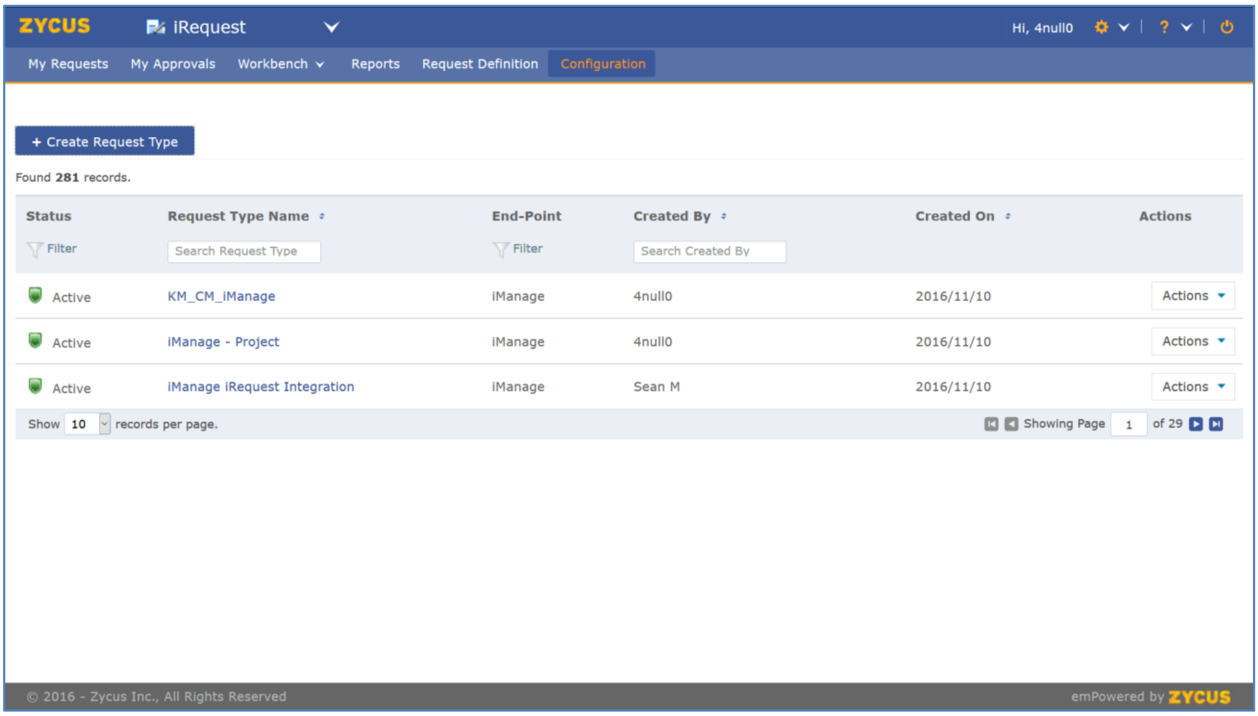
6. **Customize** page will be displayed.

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.



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.



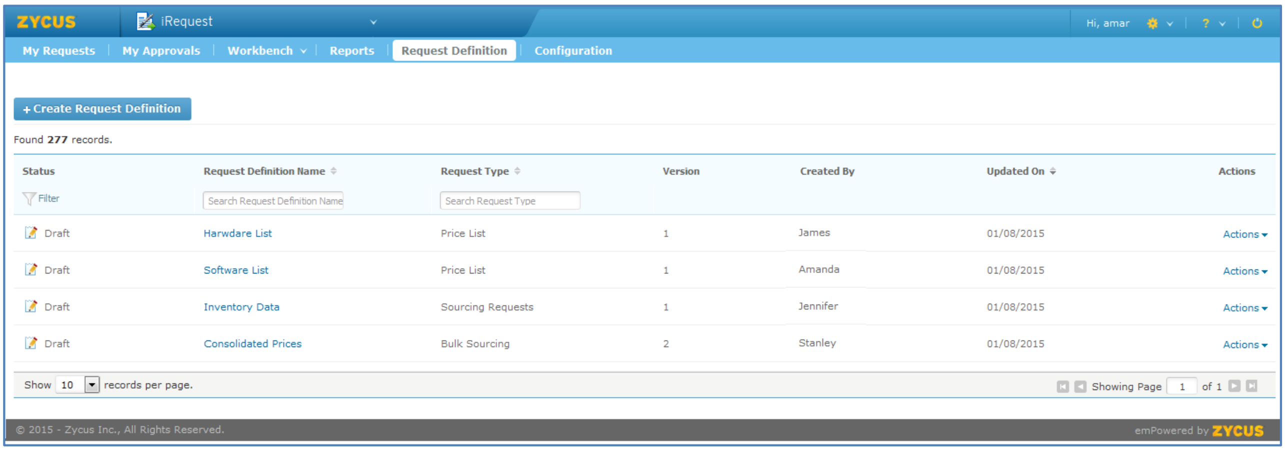
NOTE: The End-Points are configured at the point of product deployment.

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

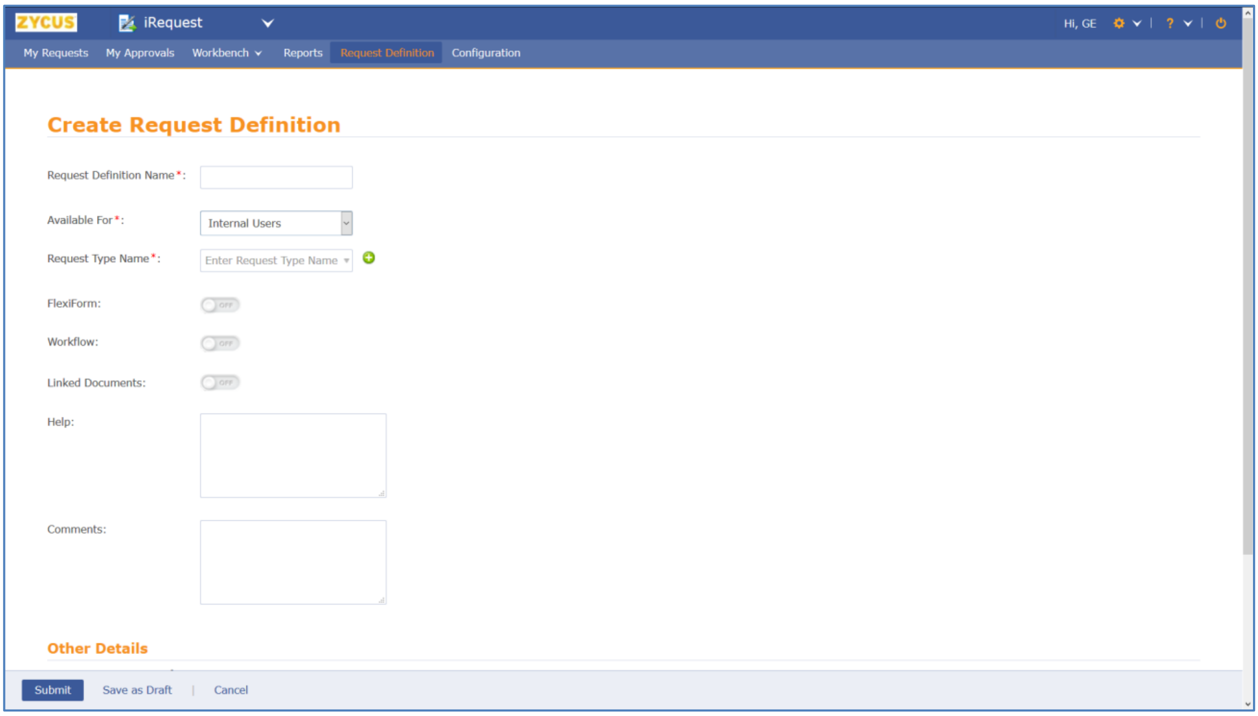
9.2 Creating Request Definition

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.



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

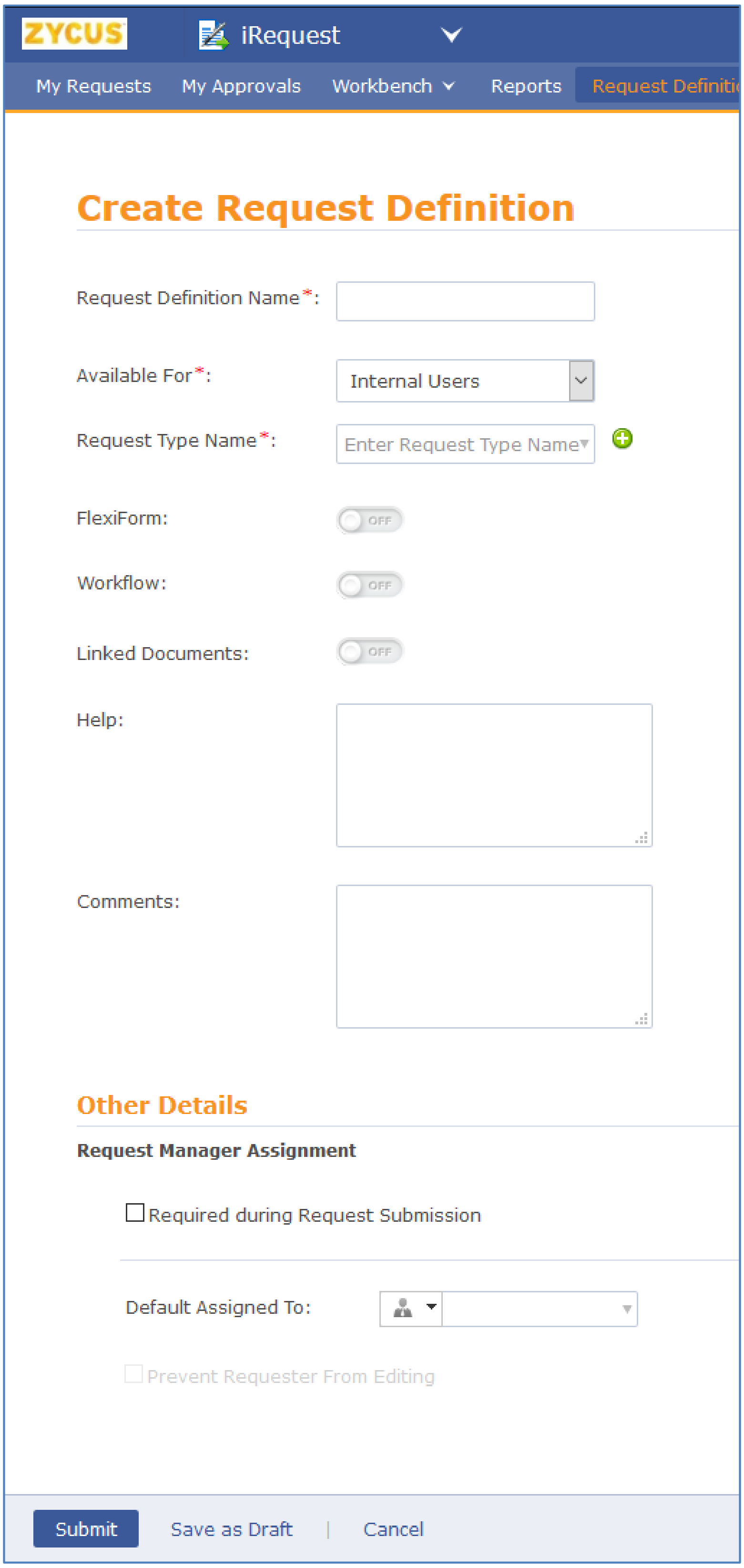


3. Enter a name for Request Definition.

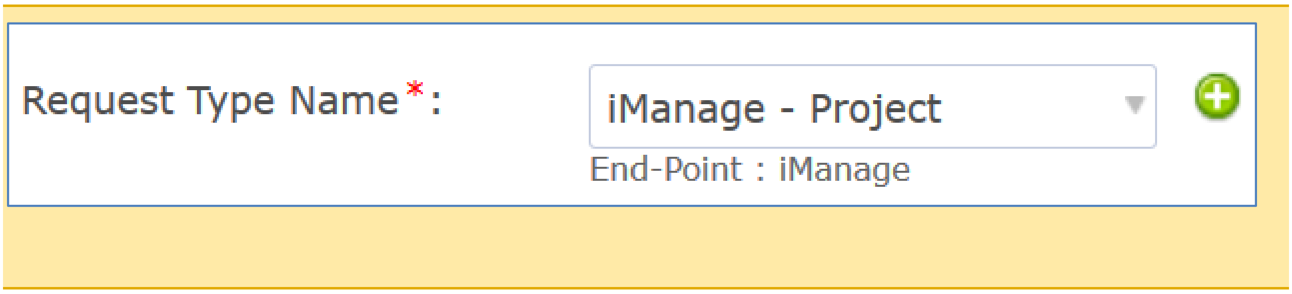
4. Set the availability of this request definition. The available options are **Internal Users** and **External Users (Suppliers)**.

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.

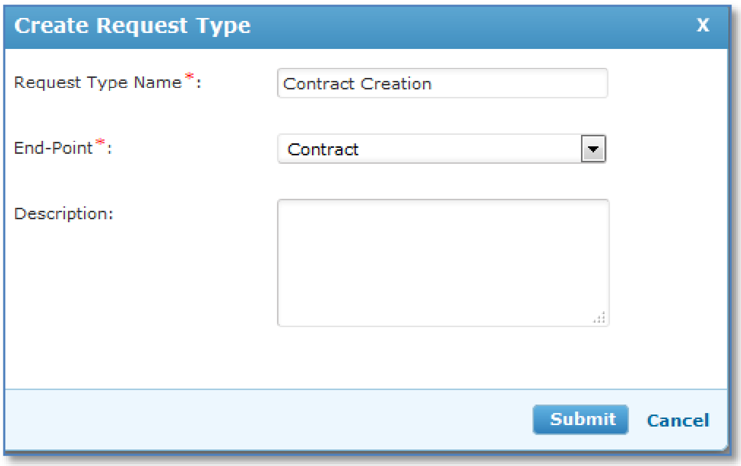
Note: *While creating a request definition for **External Users (suppliers)**, use the **Request Type Name** with **End-Point** as **None**.*



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.



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.

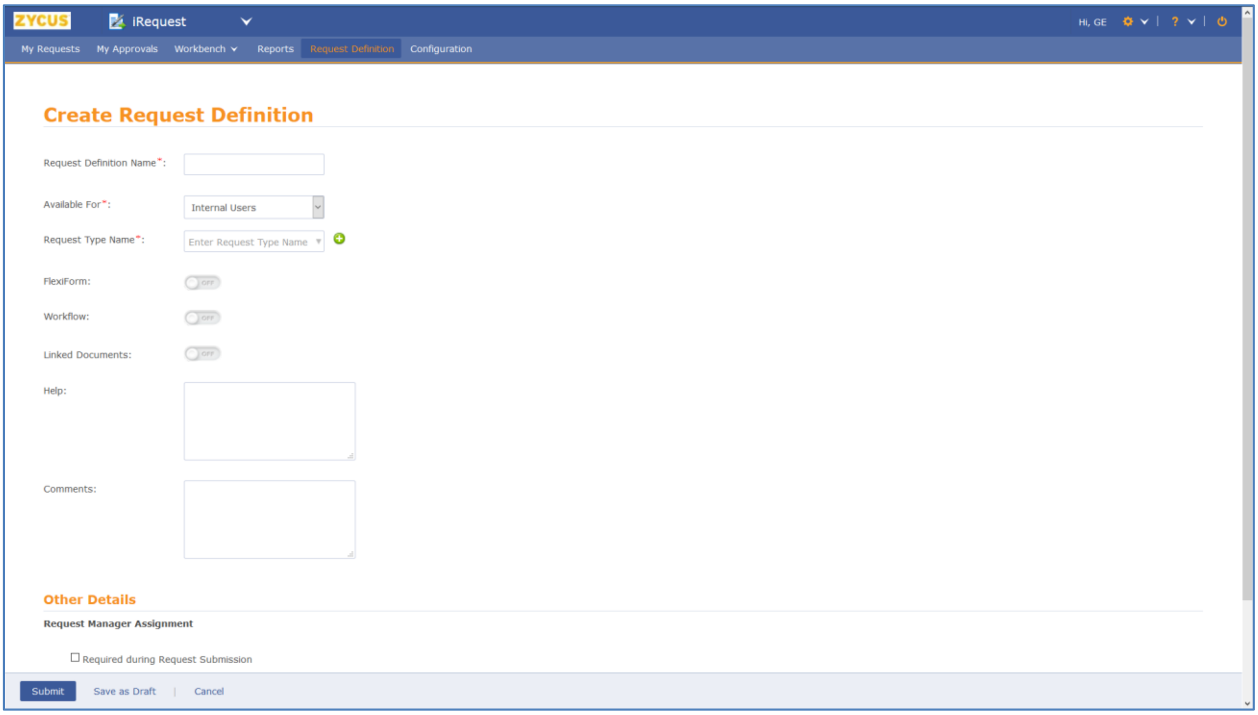
15. Select **Default Assigned To** from the drop-down list. User can also assign the request to a group of users. Check **Not editable by requester** if you wish the assigned entity to be non-editable. If this option is unchecked requester can change the assigned to entity.

16. Click **Submit** once you finish creating a request definition.

Chapter 10: Configurations

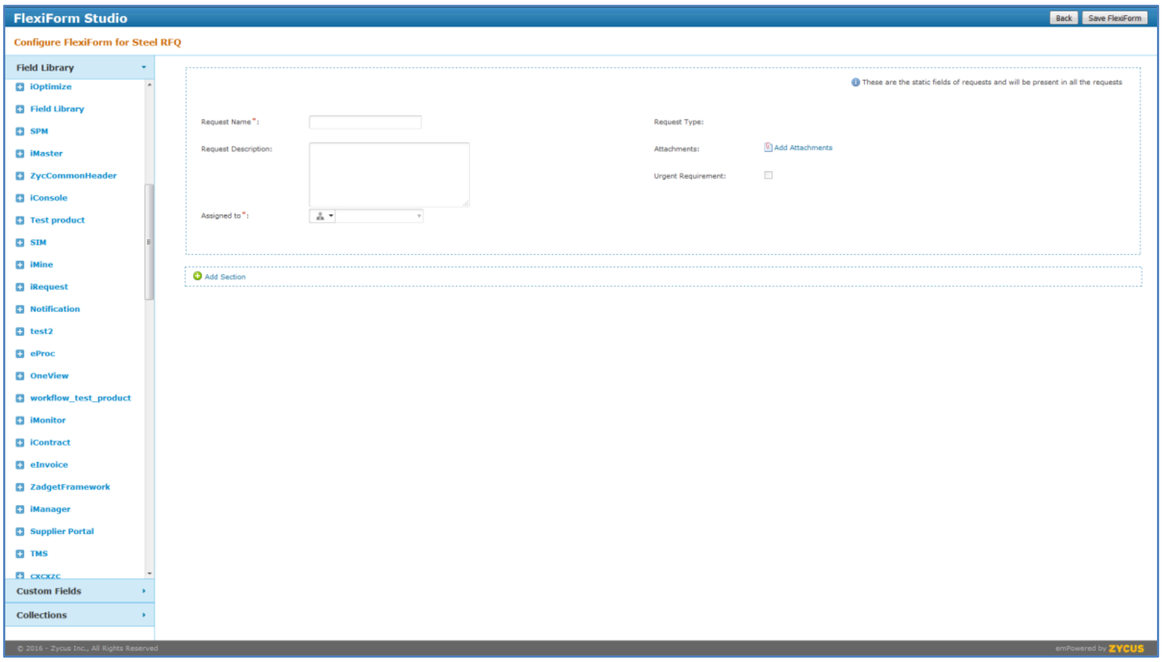
10.1 Configuring Flexiform

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

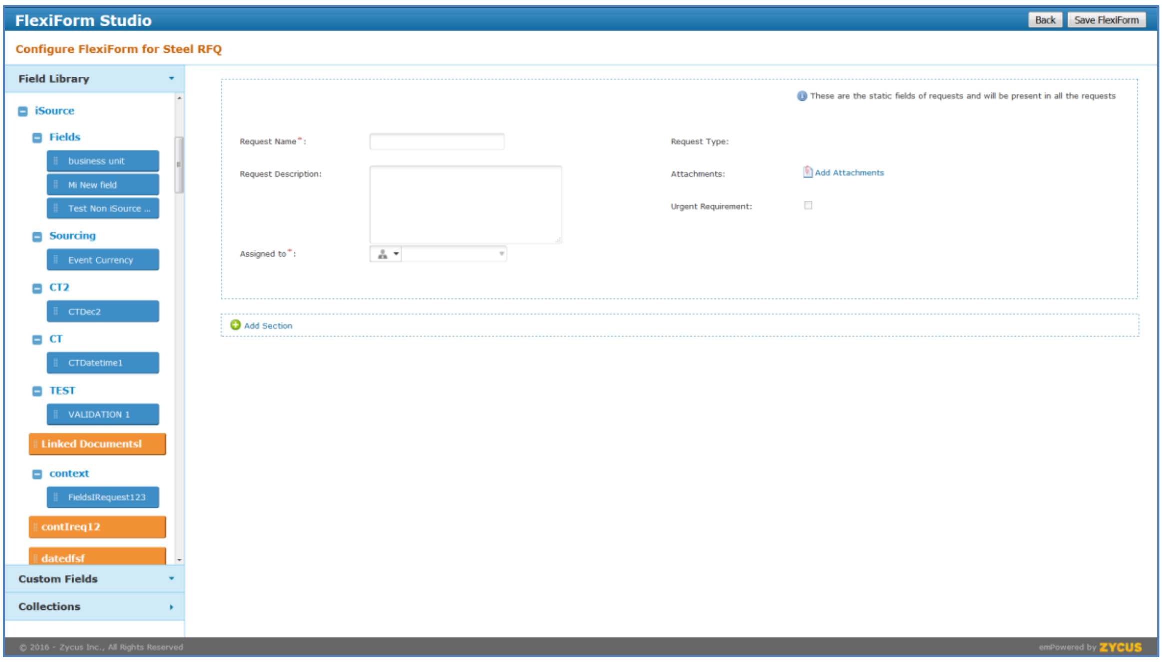


10.1.1. Configuring Flexiform using Field Library

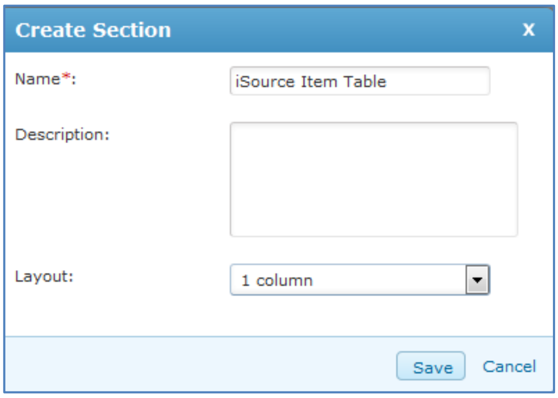
1. Click **ON** against Flexiform and then click **Configure**. Following workflow editor is displayed.



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



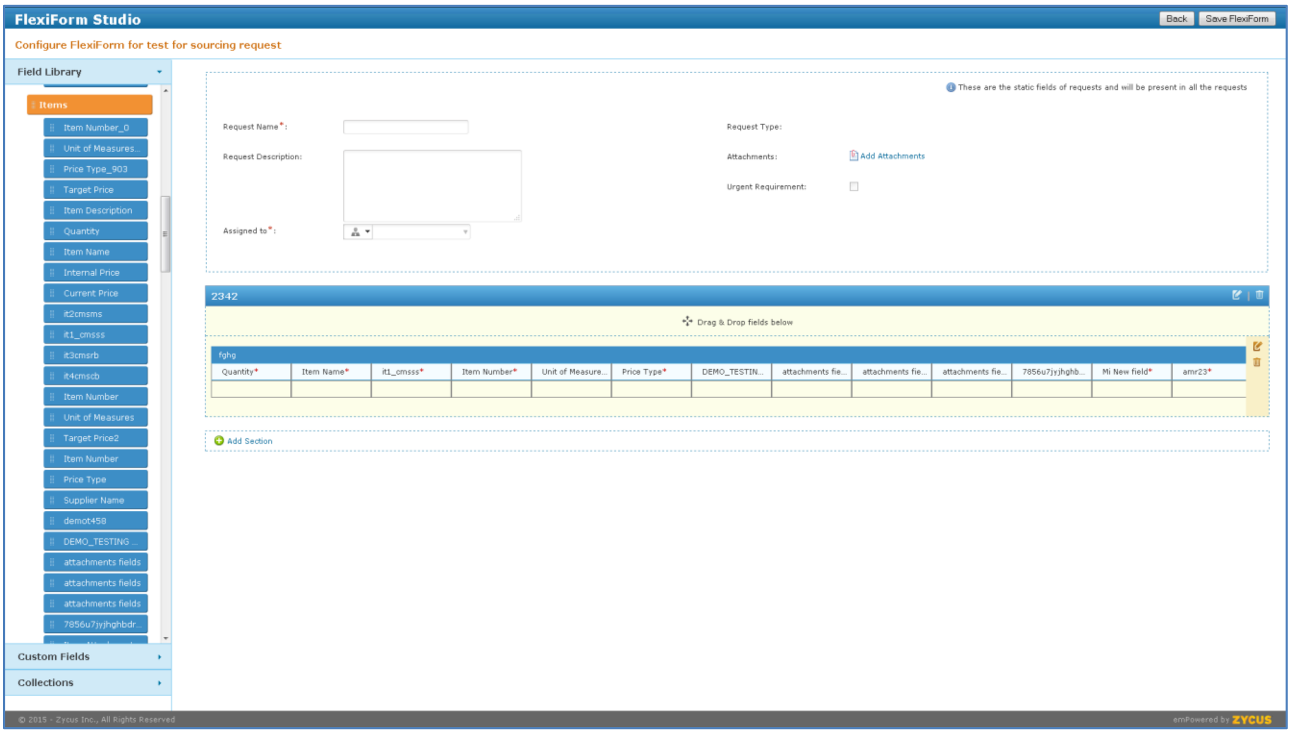
3. Click **Add Section** to create a form for the request.



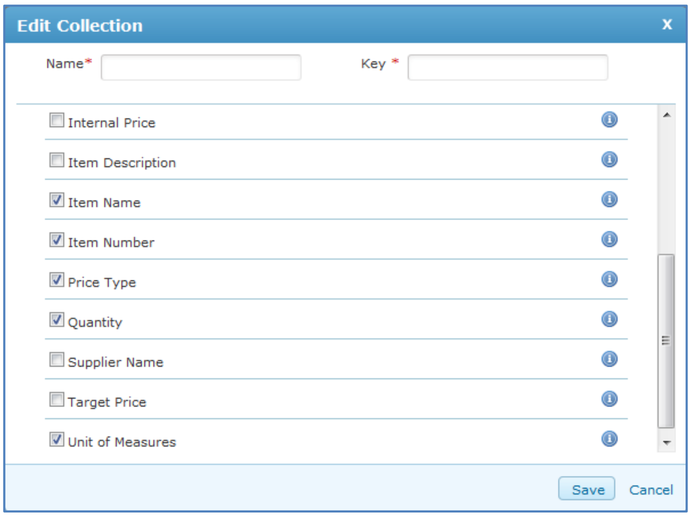
4. Enter the **Name** and **Description** of the Item table to be added to the section. Select the **Layout** (1 column / 2 column) and click **Save**.

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

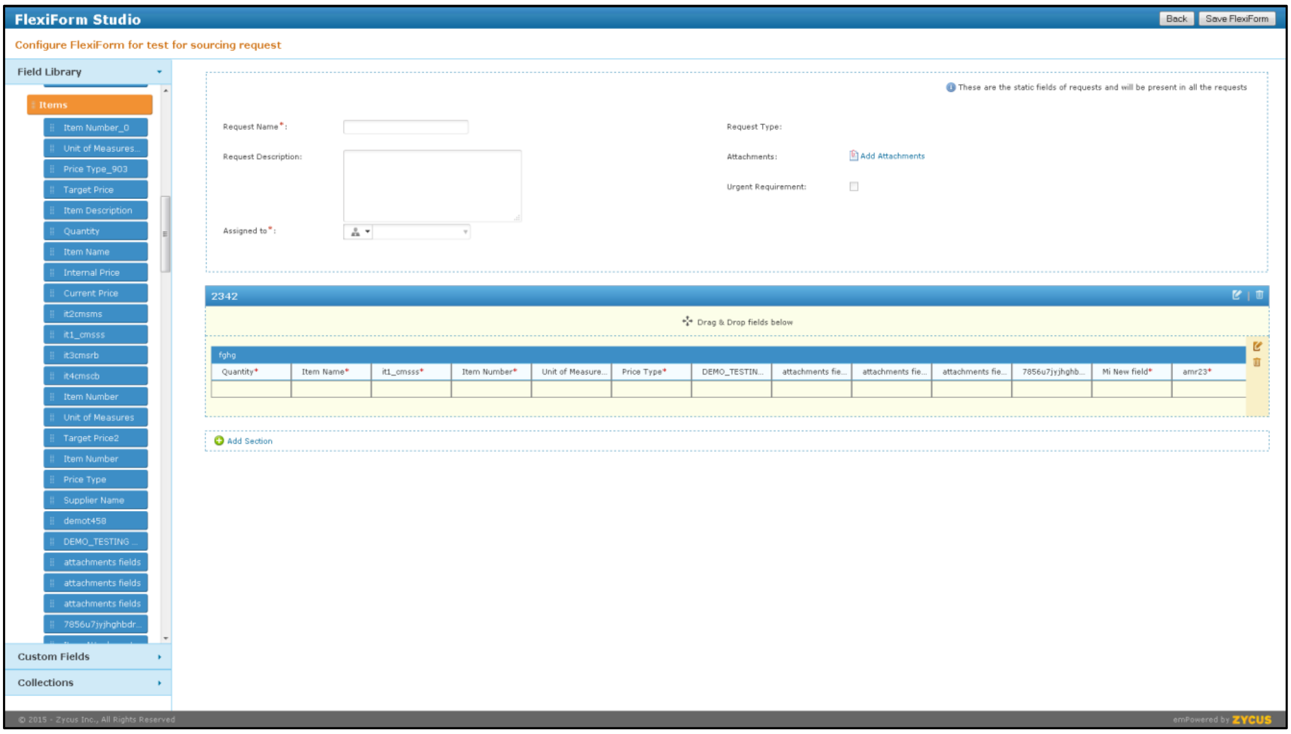
NOTE: User can add 100 items in the table at a time.



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



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

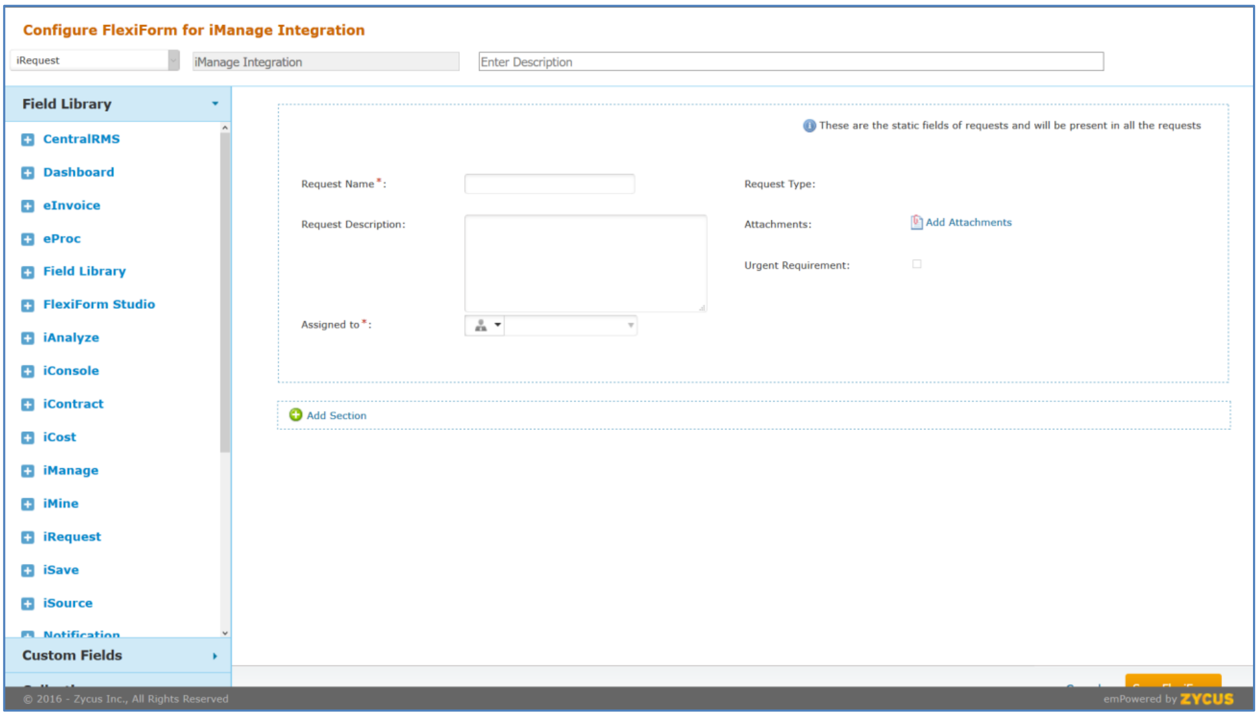


8. Click **Save FlexiForm** to save the Flexiform for the corresponding request.

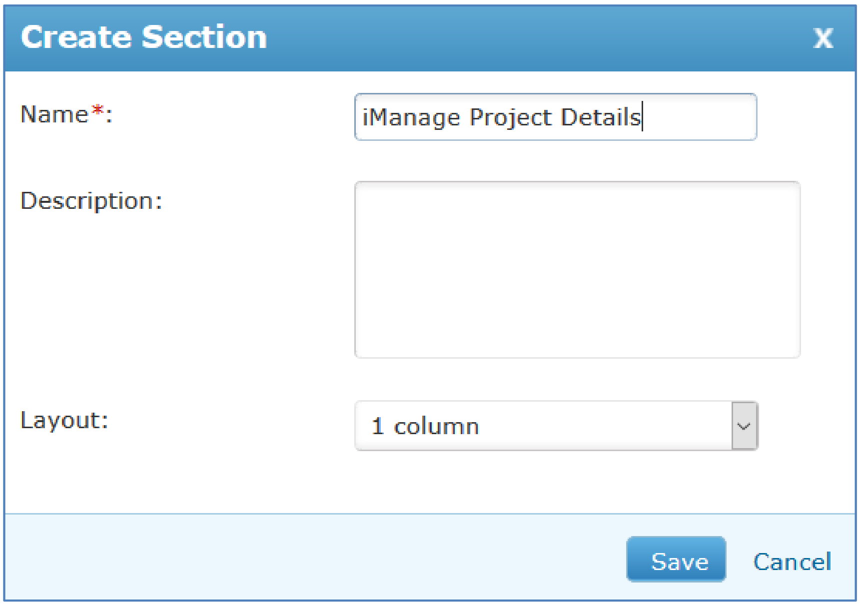
Note: Field Library cannot be configured with a table definition.

10.1.1.1 iManage: Field Library

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

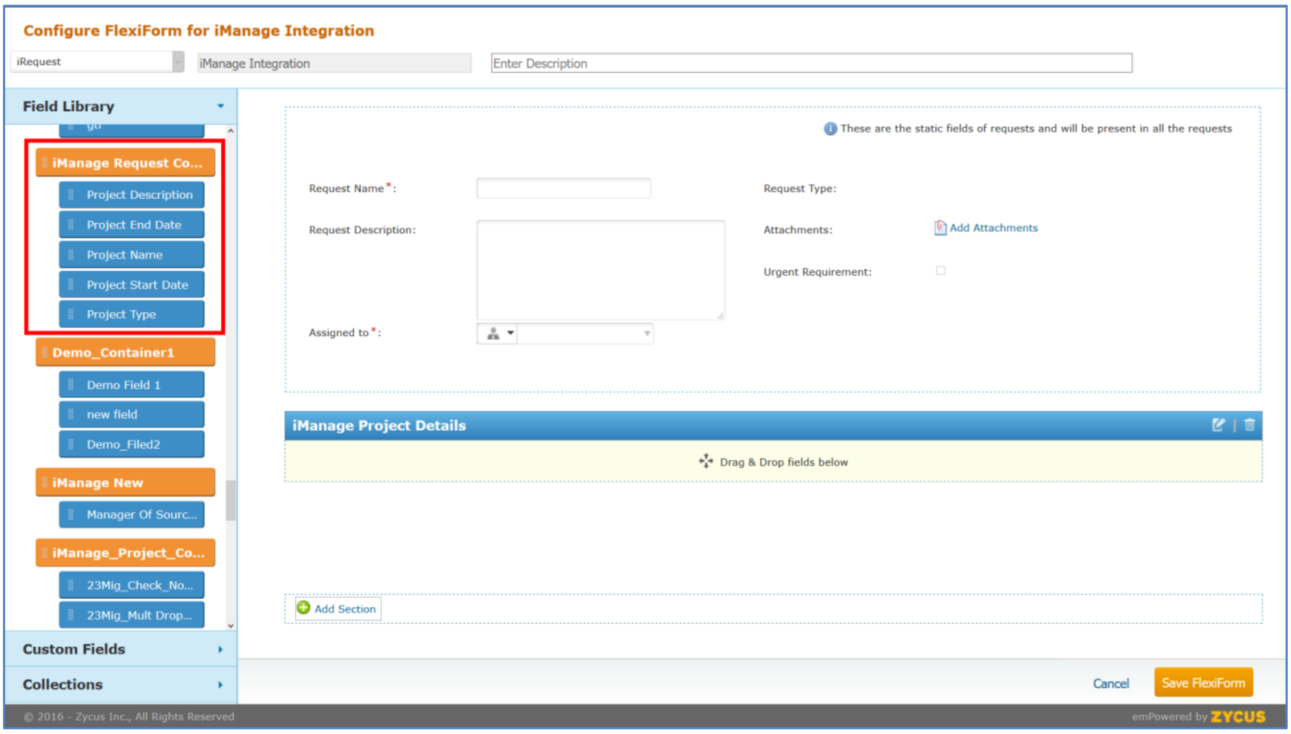


3. Click Add Section.

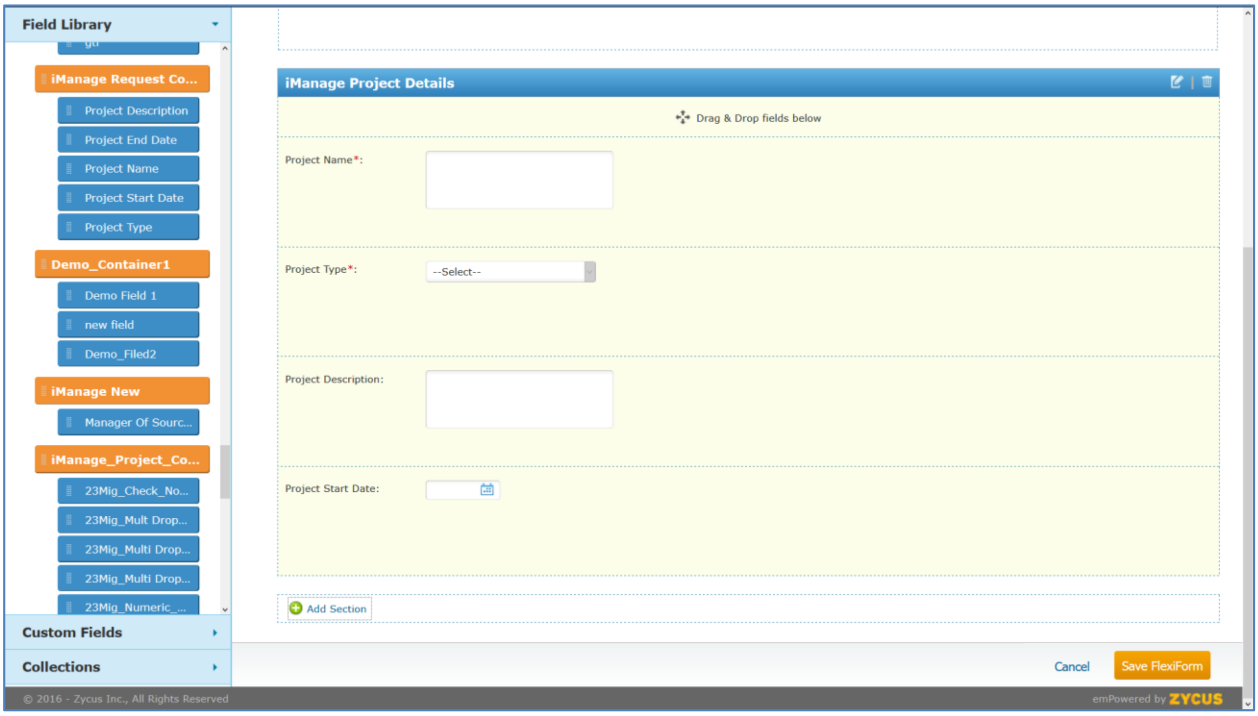


4. Enter the **Name** and **Description** of the Item table to be added to the section. Select the **Layout** (1 column / 2 column) and click **Save**.

5. From the **Field Library** panel on the left side, click **+** against **iManage** to expand all the containers configured as shown below:

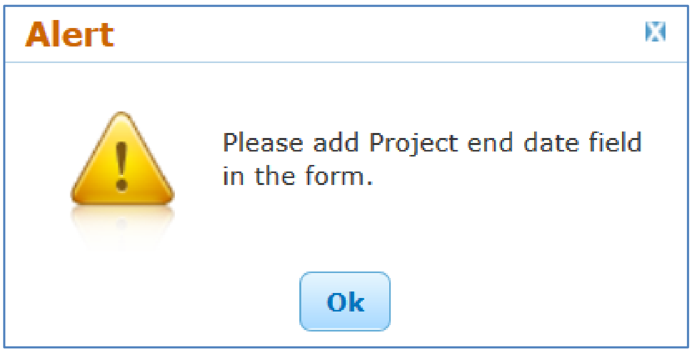


6. Drag and drop the fields from a container in the newly created section as shown below:



7. You cannot use a table in this section.

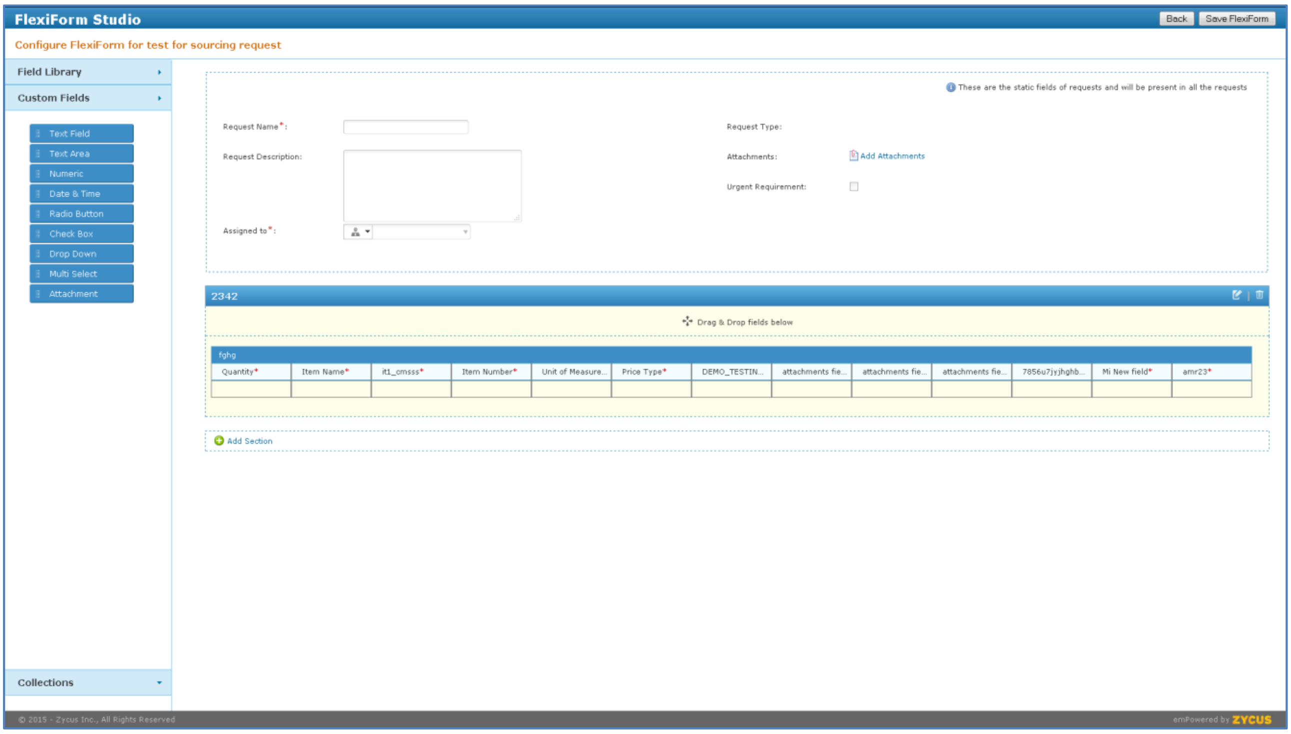
8. If there are any fields which are mandatory and not added in the section, then you will be prompted to add that field. Refer the screenshot below:



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

10.1.2. Configuring Flexiform using Custom Fields

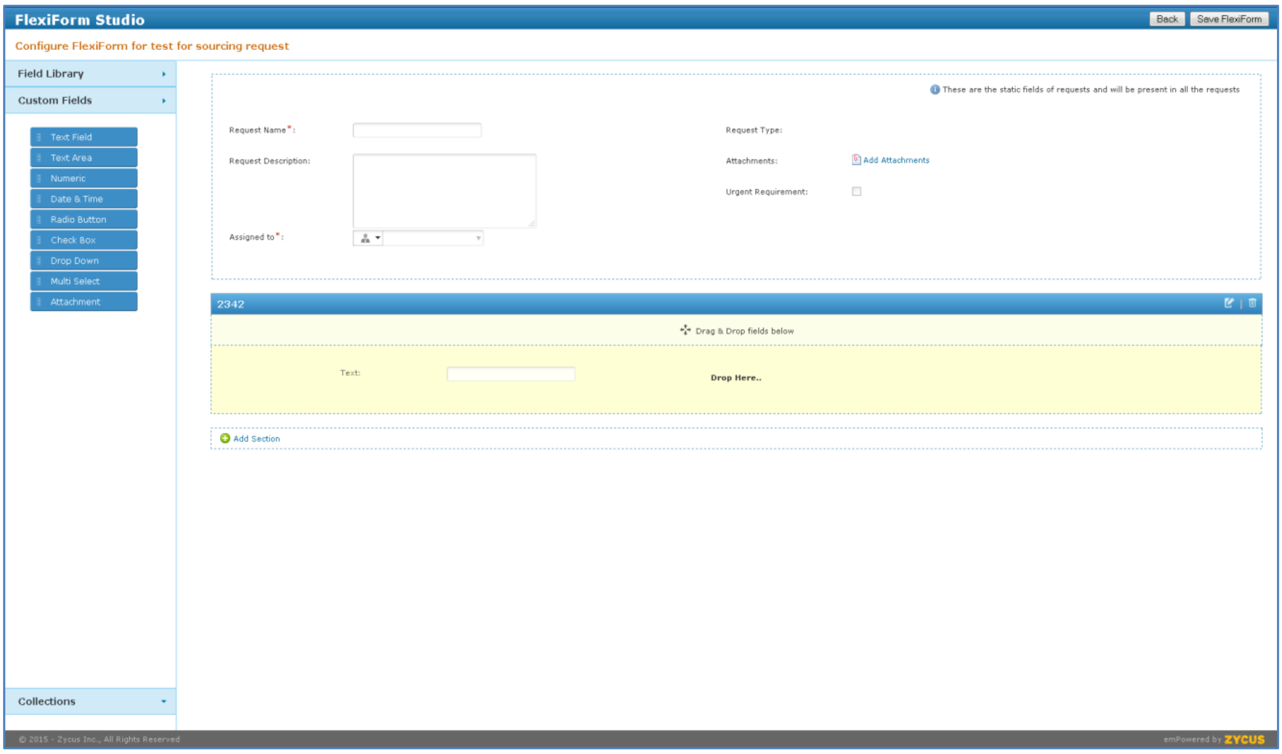
1. Click **Custom Field** to view the custom field options as shown below.



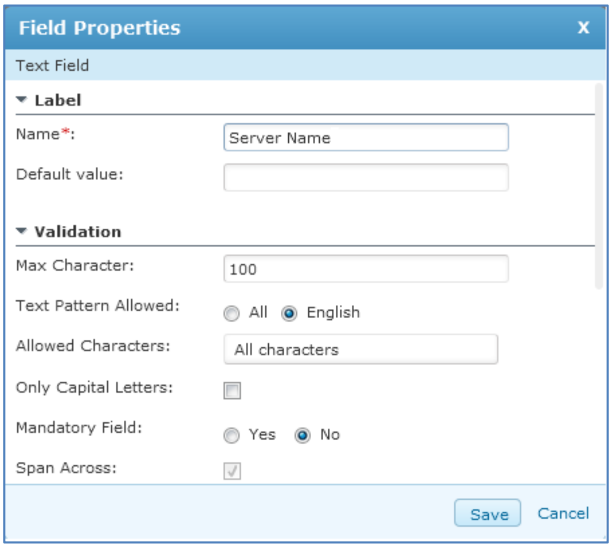
2. Click **Add Section** to create a form for the request with custom fields.

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.

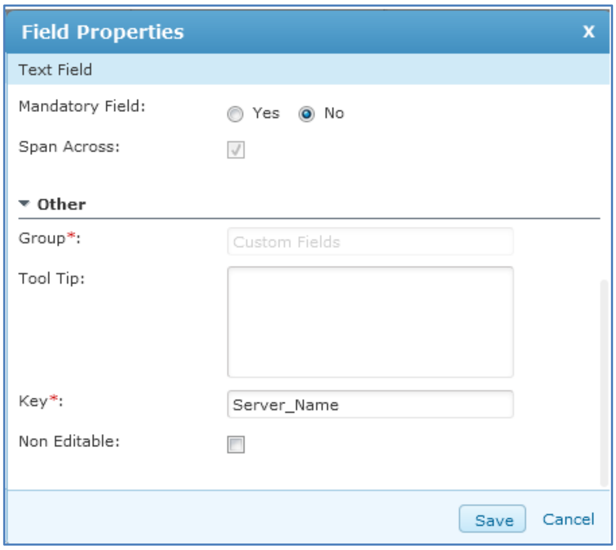
7. Enter Max. Character allowed for the label.

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.

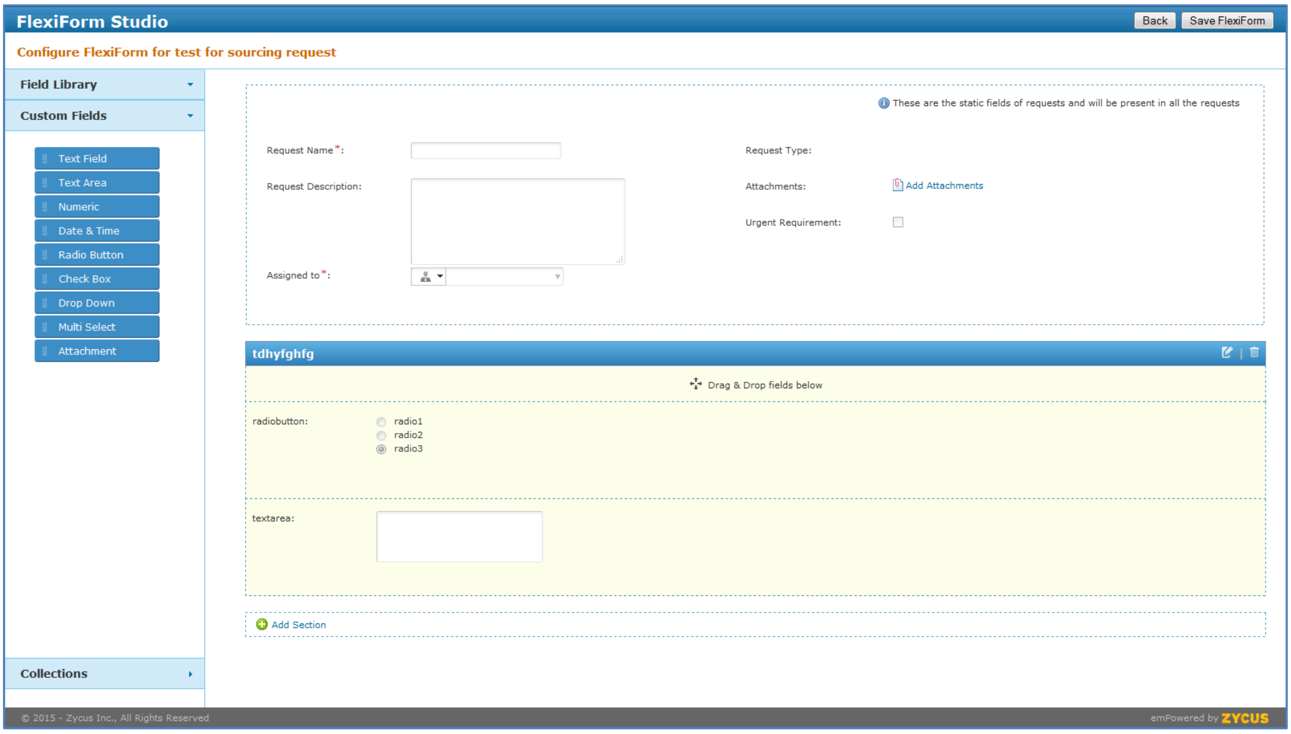


12. Group is by-default selected as Custom Fields.

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.



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 heckbox 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 heckbox 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 heckbox optionsin 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 **FlexiFom**, along with custom fields and **Field Library** tabs.

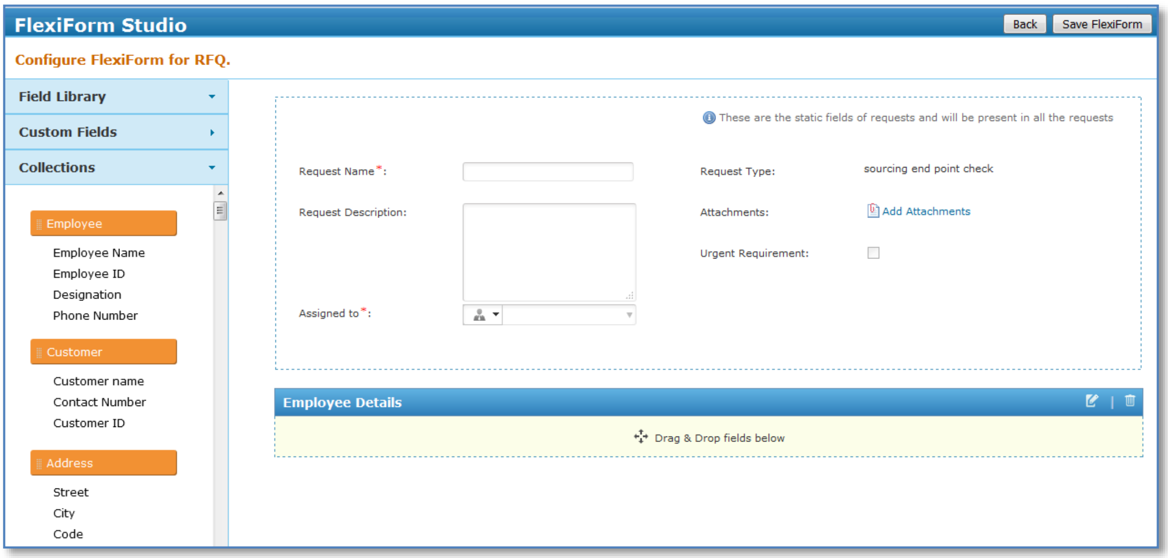


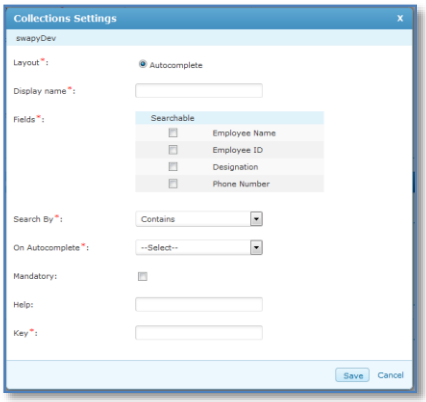
Figure 1: FlexiForm Studio with custom fields and Field Library

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

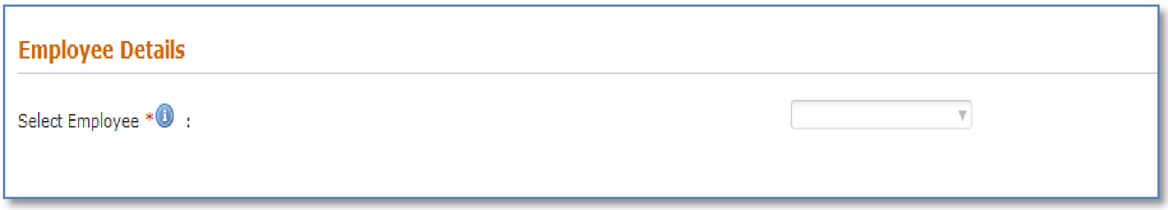
b) Search should be on which fields (At a time maximum of 3 fields can be made searchable)

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.

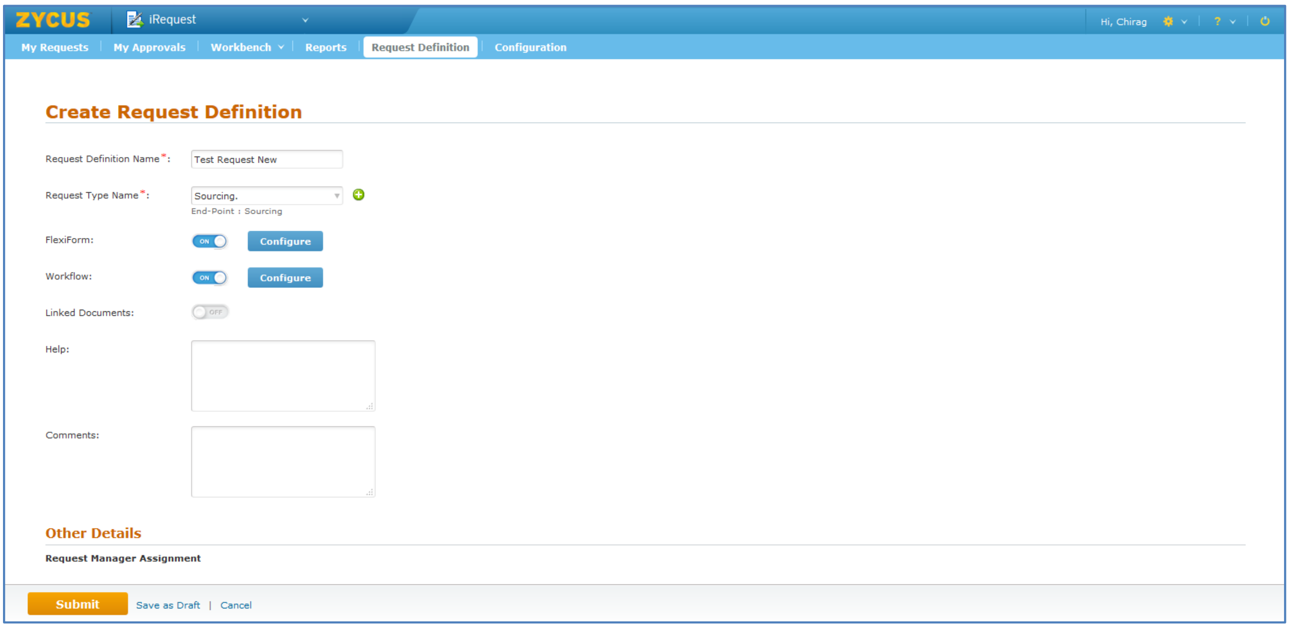


2. On entering a minimum of 3 characters the search will be triggered. The search results will be displayed in two lines; where the first line will indicate the result which will be saved and the second line will display the other two searchable fields.
3. User's entry will be saved with the **Autocomplete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

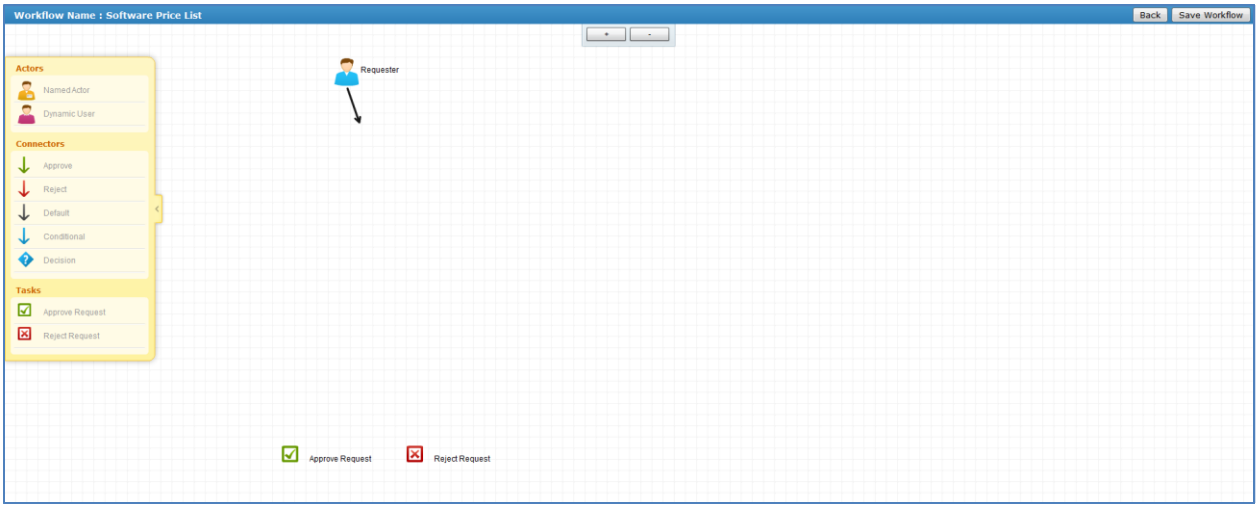
NOTE: This functionality allows capturing important information from the user in a crisp manner.

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**.

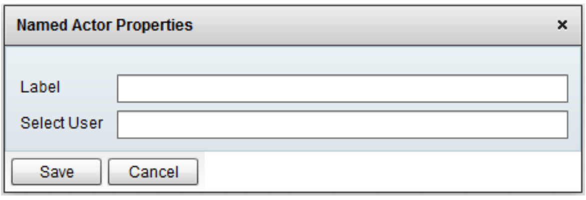
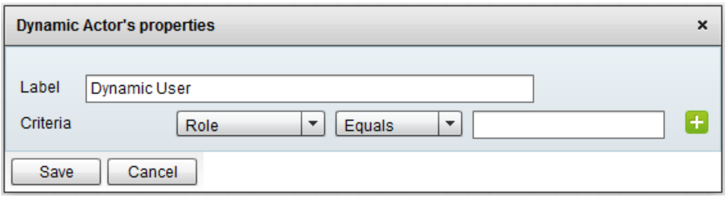
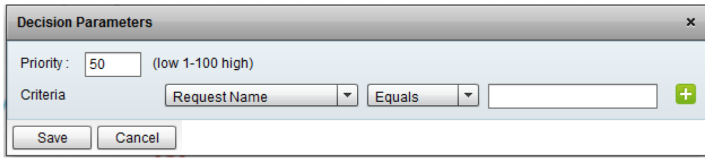
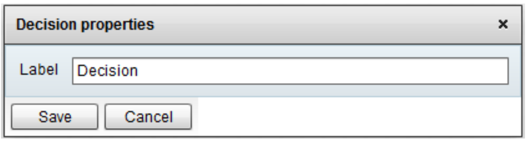


1. Click **ON** against **Workflow** and then click **Configure**. Following workflow editor is displayed.

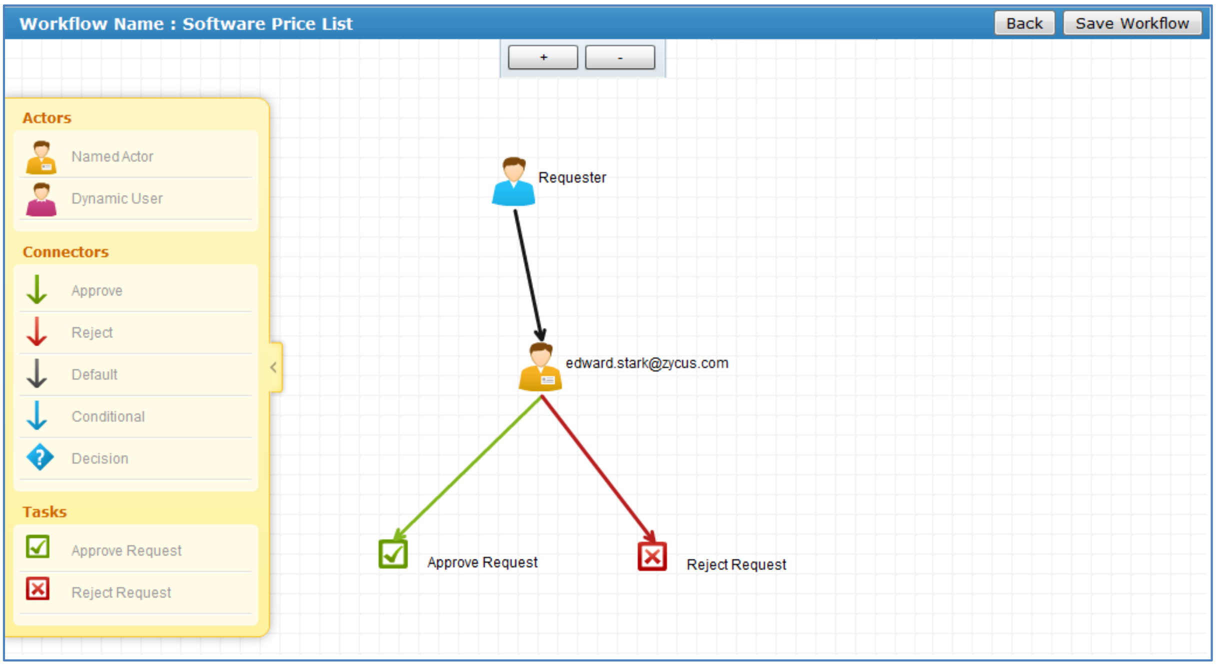


2. The left panel contains list of all elements for designing the workflow.
3. To design workflow, drag and drop required element one at a time from the panel to empty space at the right side of the panel. By default for reference, a requester element is placed to start designing the workflow.
4. In the workflow editor, **Actors** are the user that will be configured as per their roles and authorities.
5. 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	
Dynamic User	Actor is a user defined based on attributes e.g. dept. Allows allocation of multiple users to this Actor.	
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	
Decision	Decision box for directing flow as per condition to be checked	
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

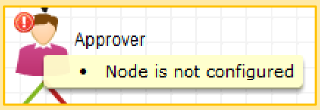
6. Following figure depicts a sample workflow configured with a simple request approval / rejection flow.



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.

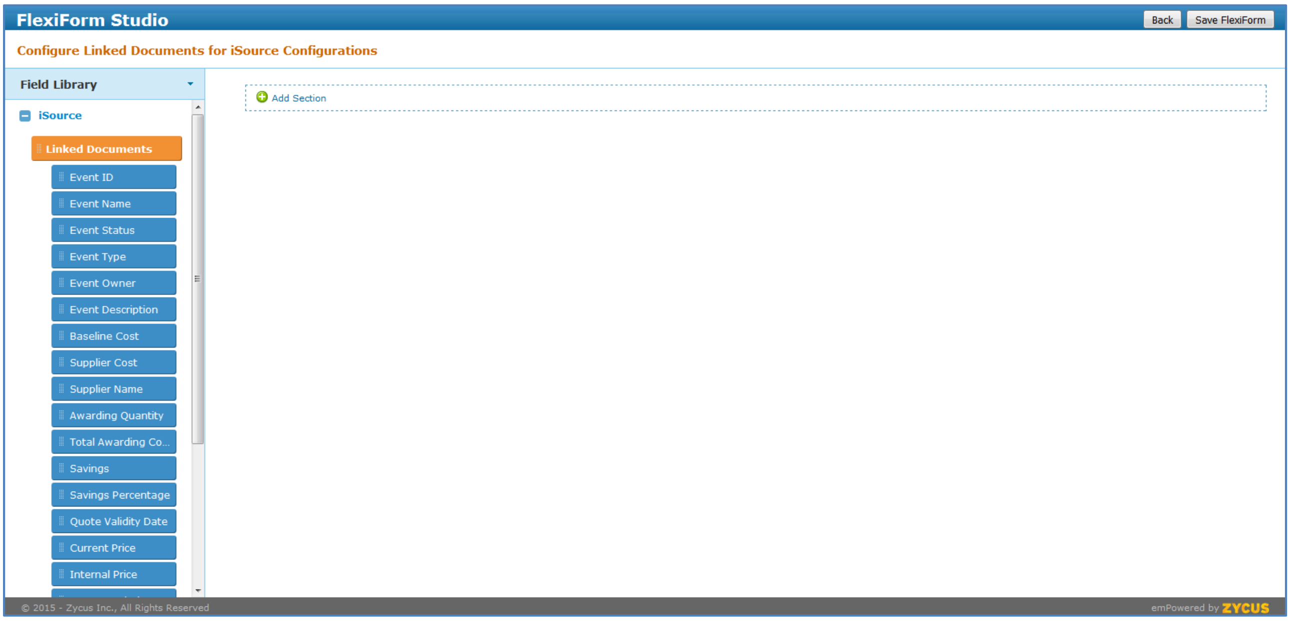


8. Make the appropriate changes and click **Save Workflow**.

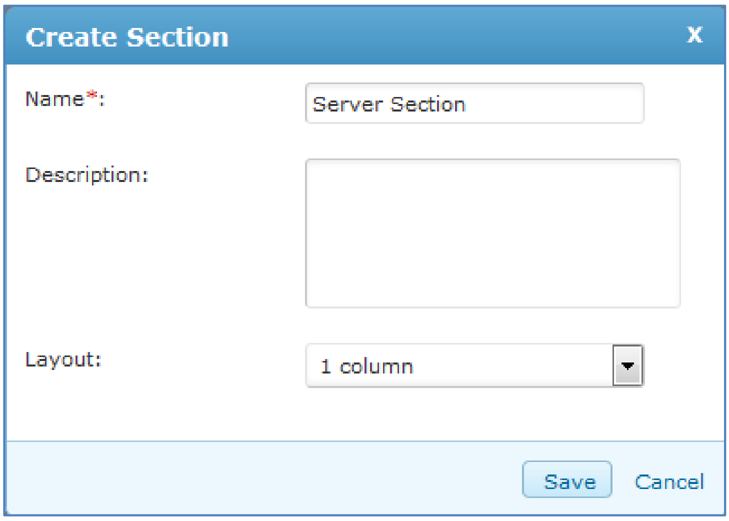
10.3 Configuring Linked Documents

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.

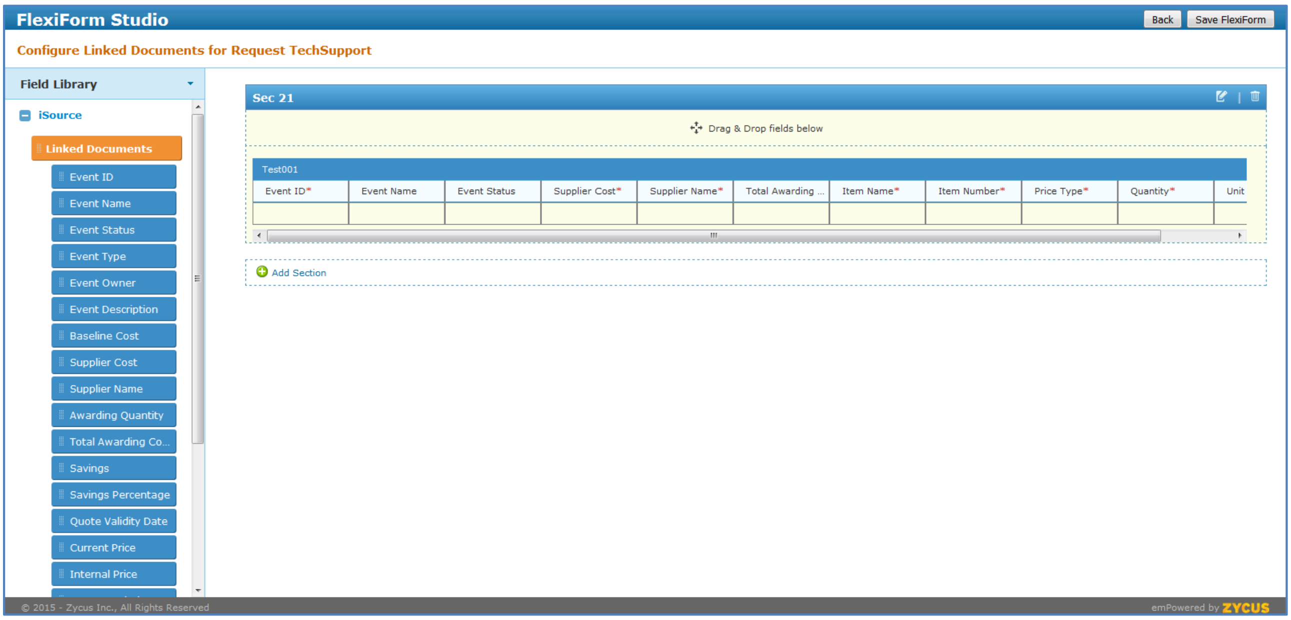


2. Click **Add Section** to create a form for the request.

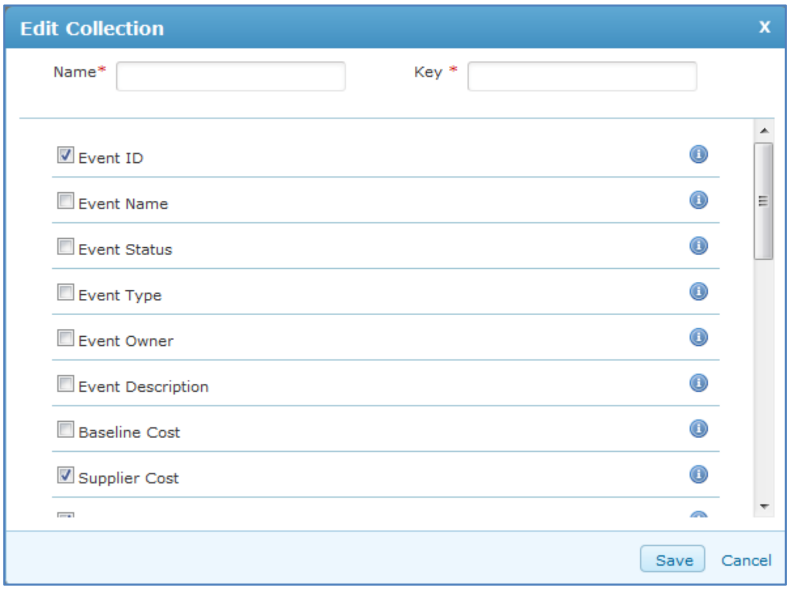


3. Enter the **Name** and **Description** of the Item table to be added to the section. Select the **Layout** (1 column / 2 column) and click **Save**.

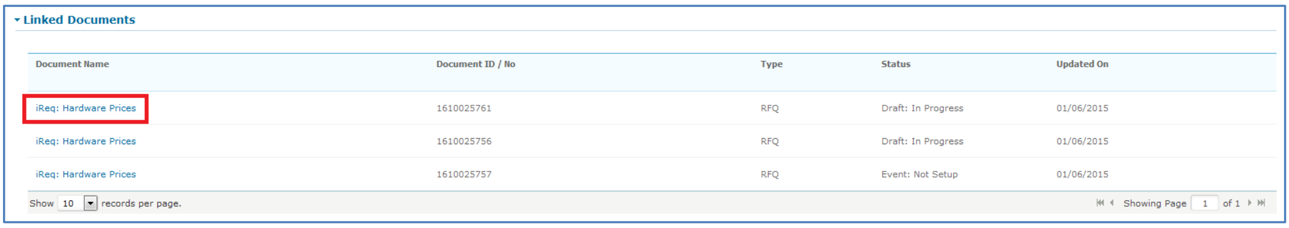
4. Select from the list of elements and drag-drop the item table into the section as shown below.



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.

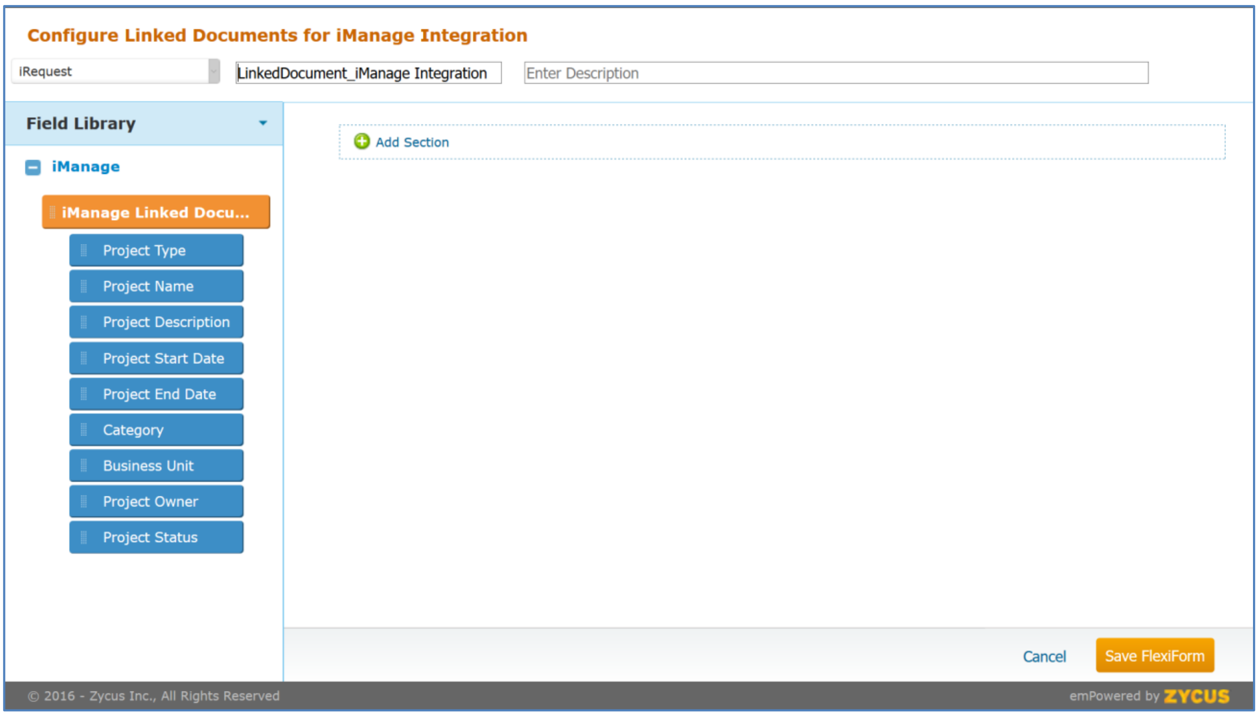


Note: The hyperlinked Request Name as highlighted above directs user to iSource. Every request is prefixed with 'iReq:' to identify events in iSource that were raised as requests from iRequest.

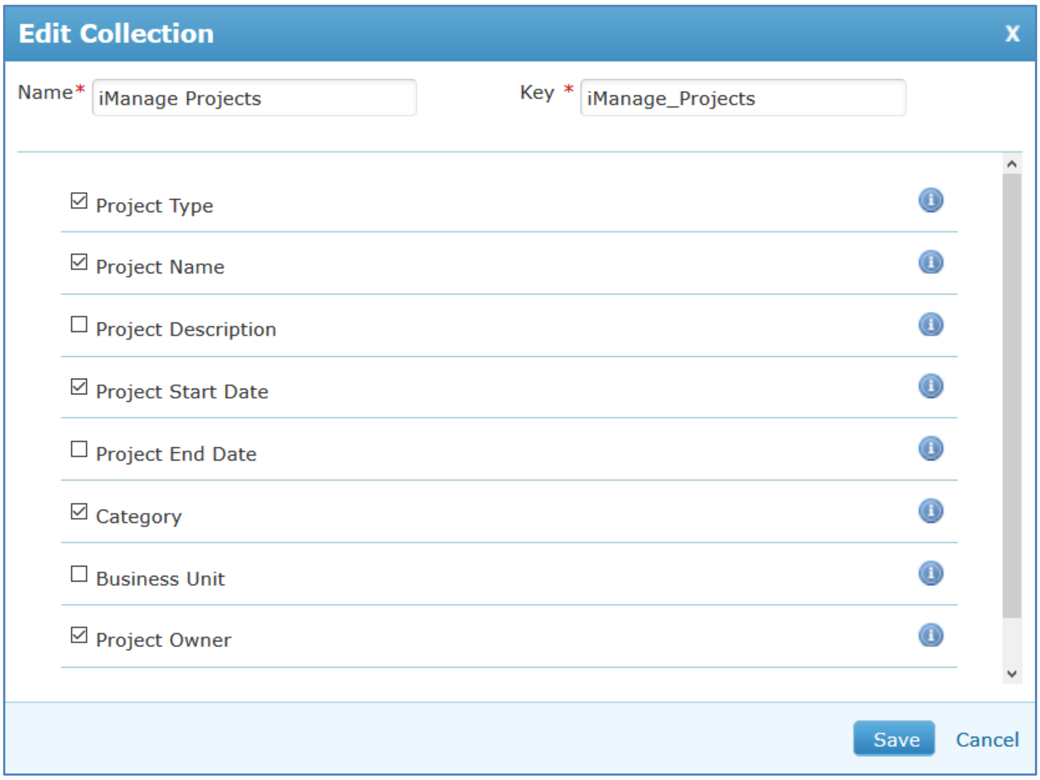
Note: Linked document cannot be configured without a table definition.

10.3.1. iManage: Linked Documents

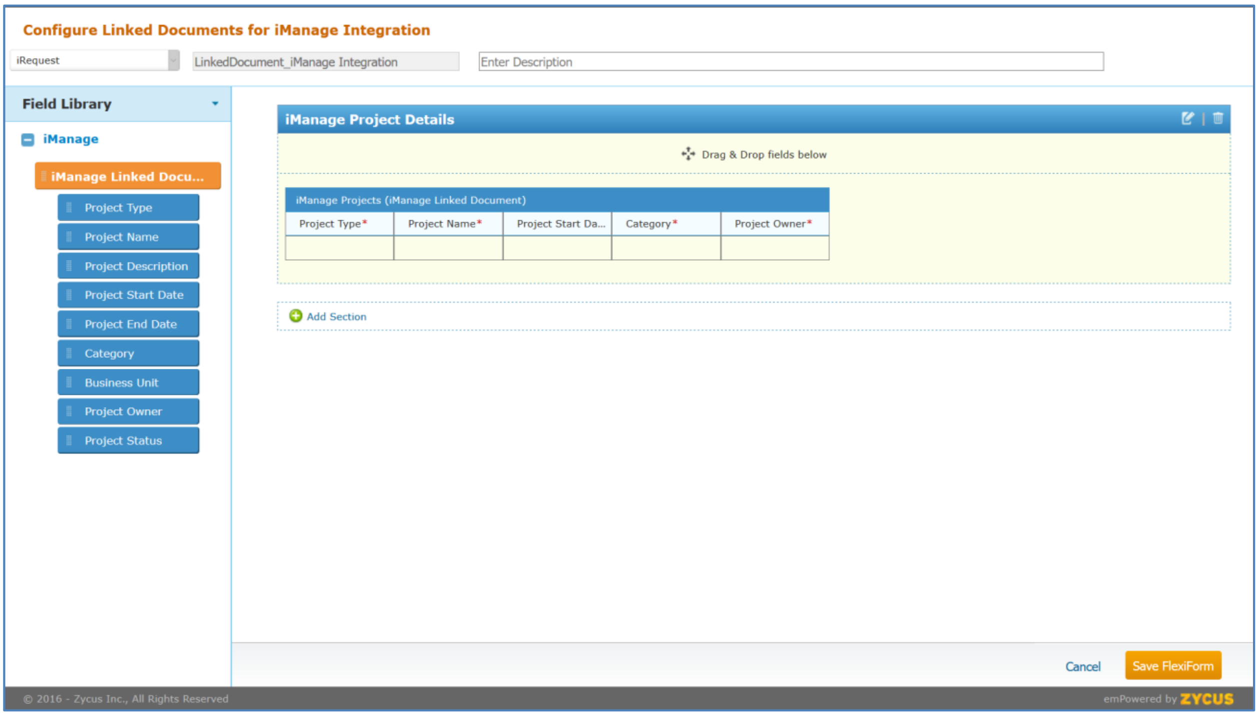
1. To configure linked documents for iManage type of request definitions, on Request Definition creation page, select **Request Type Name** configured for iManage.
2. Flip the switch against **Linked Documents** and click **Configure**. You will land on the following page:



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:



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

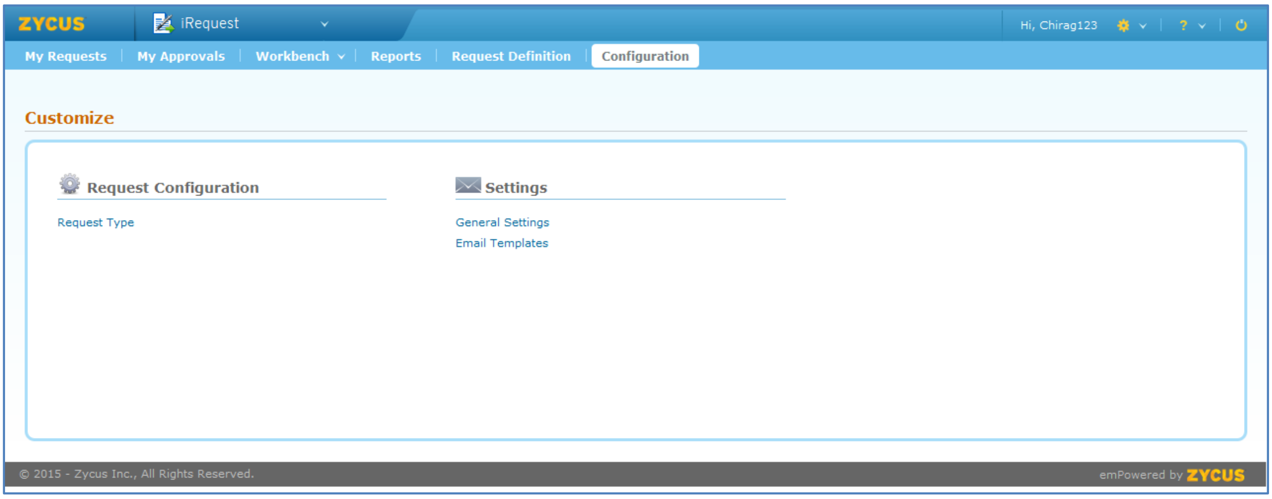


7. Click Save Flexiform.

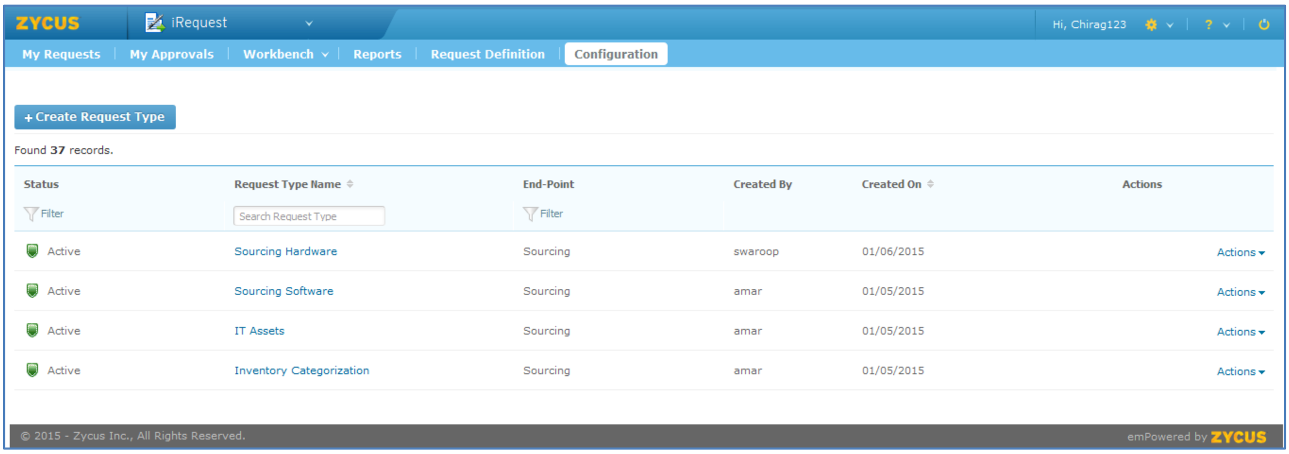
10.4 Other Configuration

Request Configuration

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



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

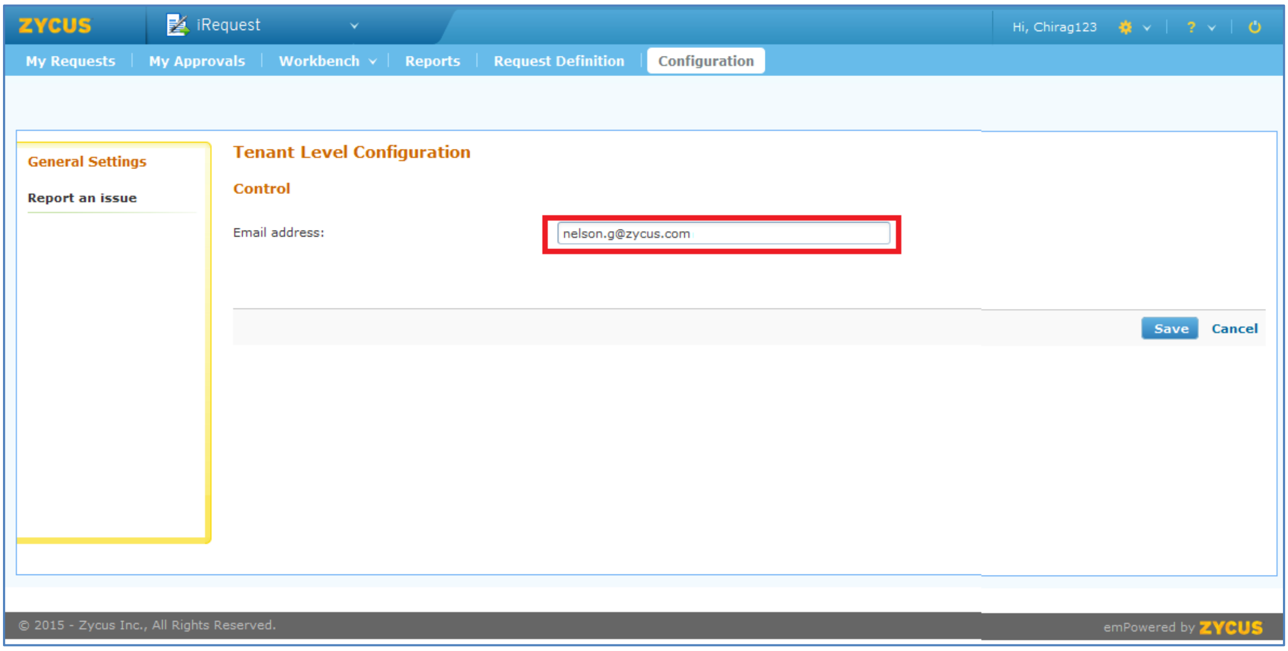


3. **View** and **Deactivate** options are available under **Action.**

10.5 Settings

General Settings

1. 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:



2. 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 -

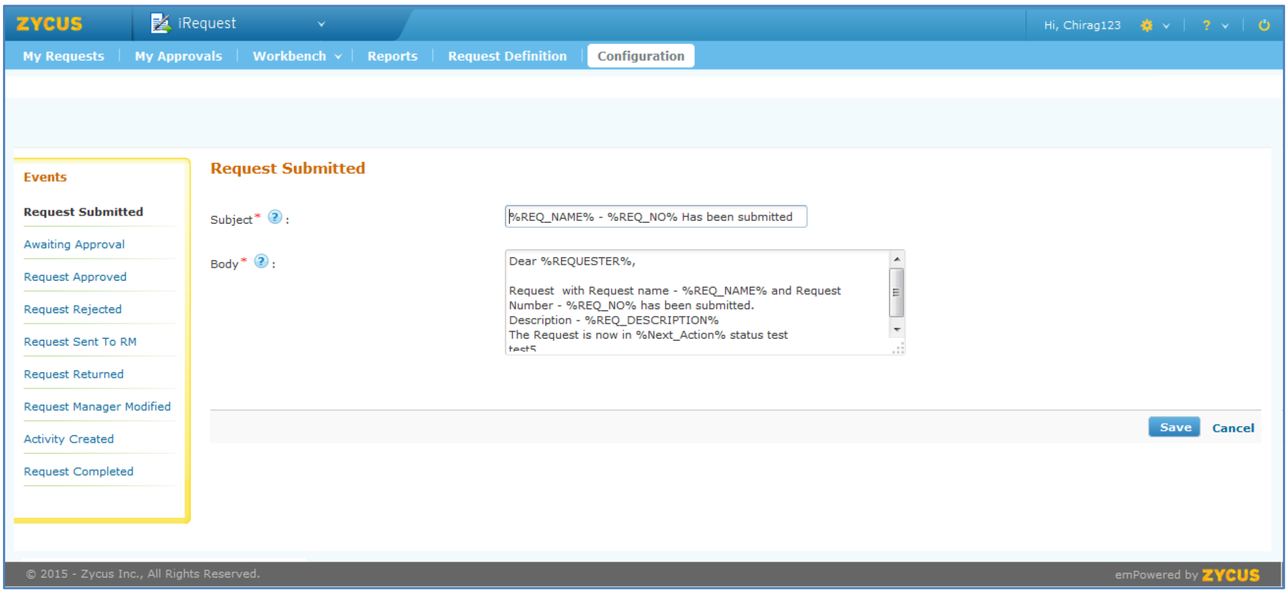
This mail is to verify the configured email ID in iRequest.

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

1. 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**.


ZYCUS
iRequest
Hi, Chirag123
My Requests
My Approvals
Workbench
Reports
Request Definition
Configuration
Events
Request Submitted
Awaiting Approval
Request Approved
Request Rejected
Request Sent To RM
Request Returned
Request Manager Modified
Activity Created
Request Completed
Request Submitted
Subject* :
%REQ_NAME% - %REQ_NO% Has been submitted
Body* :
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
Save
Cancel
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