# RequestManager – User Guide Version 1.0

**School of Dentistry** 

**University of Washington, Seattle** 



# **Revision and Signoff Sheet**

# **Change Record**

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# Reviewers

Date	Reviewer	Version	Comments
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Introduction
RequestManager is a case management software developed to manage cases, which are service requests created by members of an organization, going through an approval workflow.
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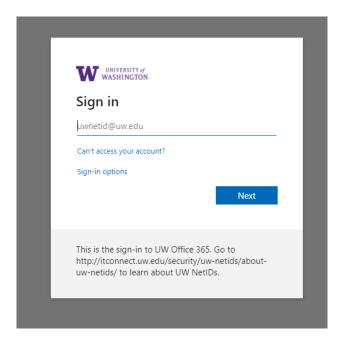
# Authentication

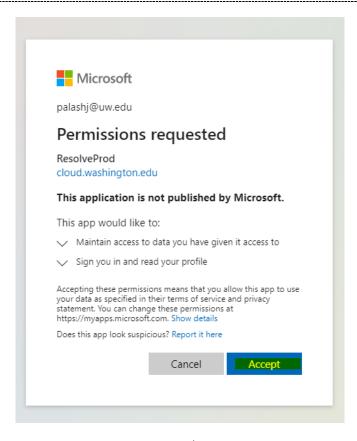
### Sign in

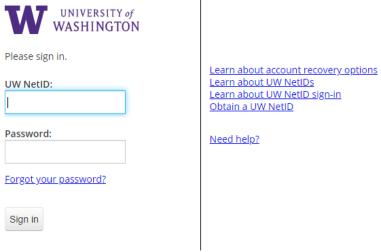
Sign up and Sign in is automatic when you visit the below mentioned URL

Application URL: <a href="https://apps.dental.uw.edu/Resolve">https://apps.dental.uw.edu/Resolve</a>

The first time you sign in, you will be asked to provide permission to ResolveProd to read your profile, after that you can sign in directly through the above link. You would require UW NET ID to sign in to Request Manager, as the application sign in page will redirect you to UW's NetID sign in.







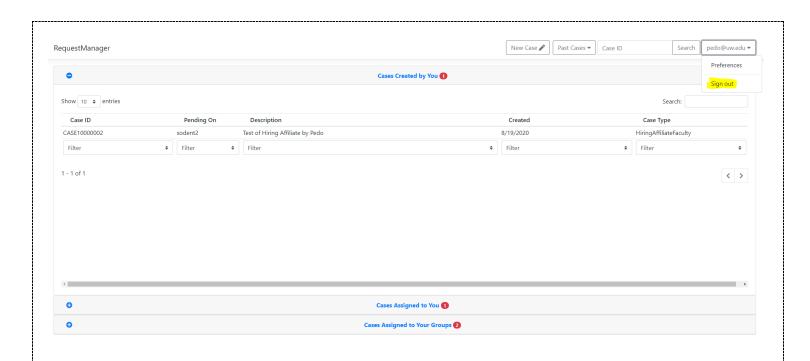
Sign in reduces how often you have to reauthenticate to access UW resources.

Learn how to sign out at the end of your browsing session.

PRIVACY | TERMS

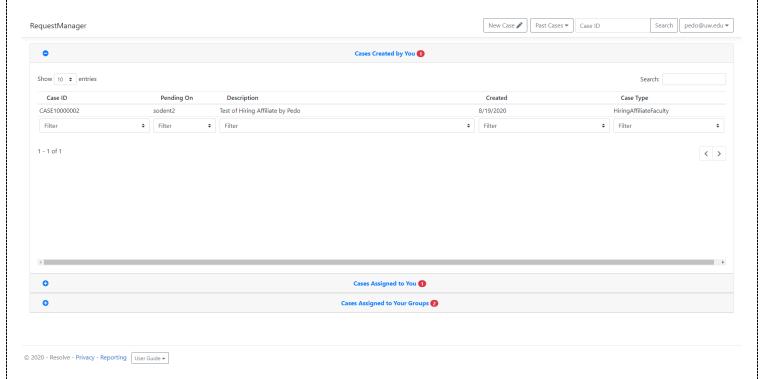
### Sign Out

To sign out of the application, you would sign out from the net id system, similar to sign out for other UW applications like Canvas etc.



### Homepage

On sign in, you will land up on the home page of the application, which consists of 3 areas described below.



### Cases Created by You

This section contains Cases created by you to track. They will disappear from this area once the Case is completely processed by the approvers. You could track the status of the cases directly through this table and can view on whom is the case currently pending.

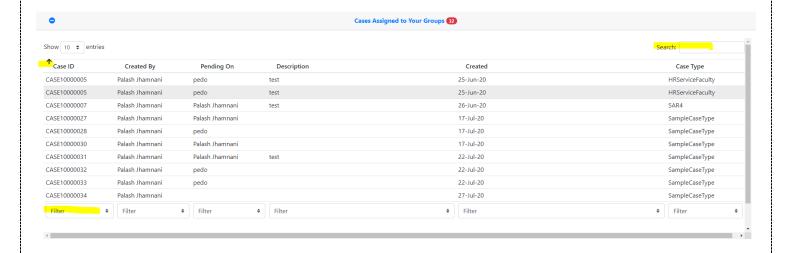
### Cases Assigned to You

On expanding this area, you would see Cases that are assigned to you. These cases require your action as you are the assigned approver for those cases in the workflow. Once you take an action on the Case under this category (The action could be Approve/Reject/Cancel), the Case moves forward in the workflow and won't show up on your homepage, unless someone re-assigns the case to you, in any case you will receive an email notification as well.

### Cases Assigned to your Groups

Cases that show up under this area are the ones that are pending and are assigned to someone who belongs to one of your groups. This area exists, so that you could pick up cases assigned to your groups, in case your group member is on leave (given the case is pending on that group member)

### Filter/Search/Sort

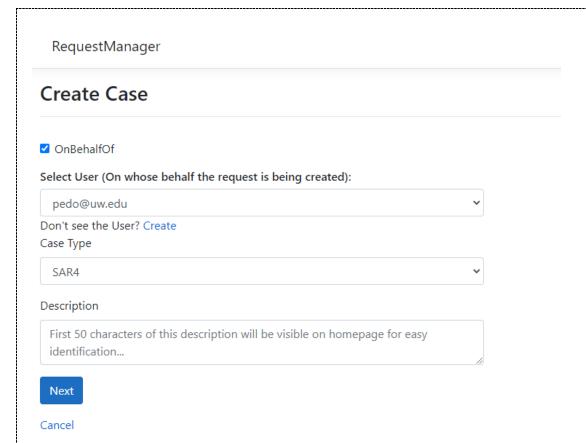


In any of the areas, you could filter, search, and sort cases as per your requirements.

### Creating a Request/Case



You can create a new request by going to "New Case"



You could create the Case on someone else's behalf, or for yourself. You would need to select the Case Type and fill out the short description. This description would show up on your and the approvers homepage and would help them to identify the Case they would be handling, so it is important that you write a short note briefly describing your request.

On the next page, you would be served a form that you would be specific to the Case Type you selected. You could edit the information at a later point in time as well, before the Case gets marked as processed.

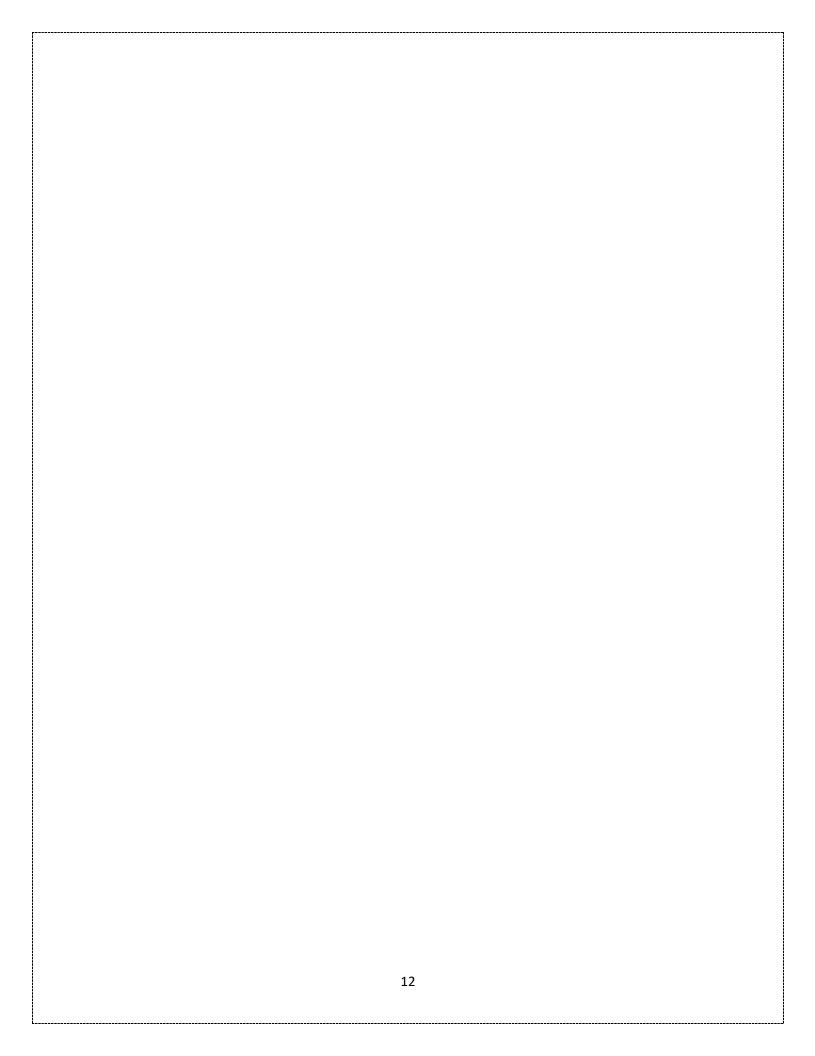
# Case Types

### How to choose a CaseType

The following table lists the different case type and when to use them.

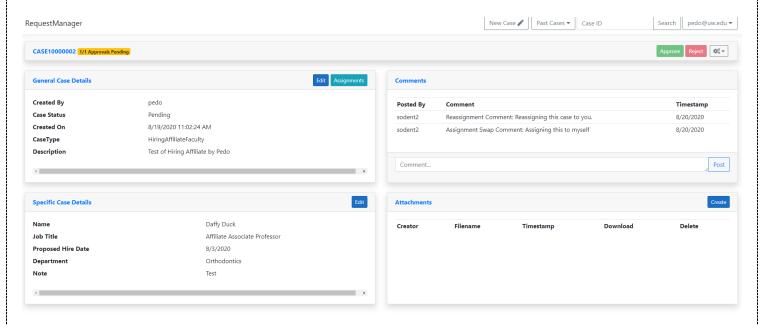
CaseType Name	Case Description	Notes	
HR Service Requests			
CompBasePayChange	HR Service Compensation Base Pay Change		
	Staff/Students Only		
CompAllocationChange	HR Service Compensation Allowance Change		
	Staff/Students/Postdoctoral Scholars Only		
CostAllocationChange	HR Service Costing Allocation Change		
	All		

EndDateChange	HR Service End Date Change All	
FTEChange	HR Service FTE Change All	
MoveWorker	HR Service Move Worker Staff/Student Only	
SecurityRoleschange	HR Service Security Roles Change All	
Termination	HR Service Termination All	
	Hising Passage	
I living Affiliate Feet lite	Hiring Requests	
HiringAffiliateFaculty	Hiring Request (Affiliate Faculty) All affiliate faculty are unpaid.	
HiringFaculty	Hiring Request (Faculty)	
minigracuity	Please review Faculty <u>Hiring Procedures</u> to determine if an Affordability Statement is required.	
HiringStaffStudents	Hiring Request (Staff or Student)	
ScholarResGradHire	Hire/Rehire (Postdoc Scholar/Resident/Grad Student), Promotion (Postdoctoral Scholar Only)	
	Student Requests	
PerioLimitedCare	Periodontics Limited Care Request	
	Other Requests	
axiUmFeeSchedule	axiUm Fee Schedule New/Change Request	
CPPaymentRequest	Dental Purchasing Payment Request	
FoodEvent	Food/Beverage/Event Request	
PatientEvent	Patient Event Form	
Travel	Travel Requests (Includes registration)	
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### Case Details

After a Case is created, you could then visit the Case Details page by clicking on the Case row on homepage.



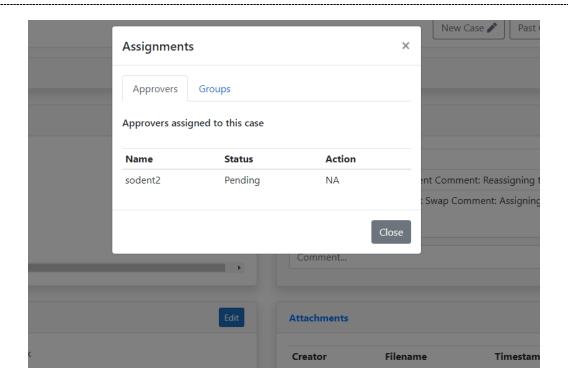
There are 4 sections on this page and some other option as described below.

### General Case Details



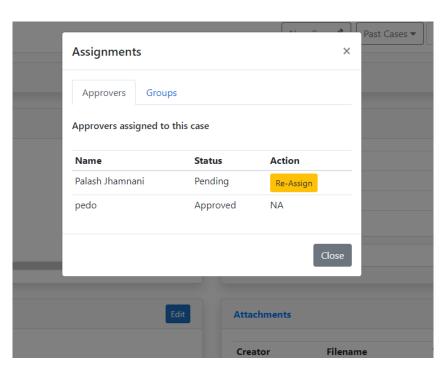
In this section you would see "Edit" button, which would remain enabled only until the Case is processed. A User can only edit the Case Description after a case is created.

The Assignments button shows the Approvers and Groups to which the case is currently assigned.



Here you can see the Status of the approver, which can be either Pending, Approved, Rejected or Cancelled. Under the Action column, you can see 3 options, either "NA", or "Reassign" or "Assign to Self". NA signifies that no action can be taken for that approver by you. The other 2 options are as described below:

### Reassign

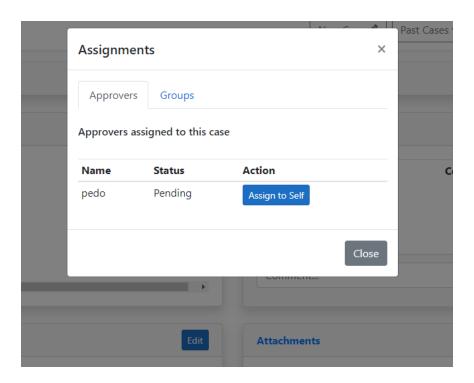


When this button appears, you (as an approver, if you are one to whom the case is assigned to) can reassign the case to someone else from your within your group who you feel knows more about the case and would be better suitable to handle it.

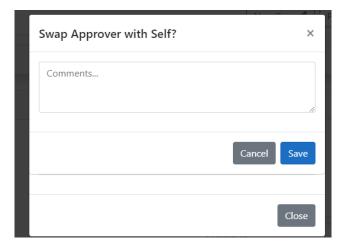
# Reassign Case - CASE10000058 Select a group member from group: uw\_sod\_webapps\_resolve-admins Optional Comment...

You would need to select the group member on the next page as shown above and provide an optional comment, so that the new approver knows why it was assigned to them.

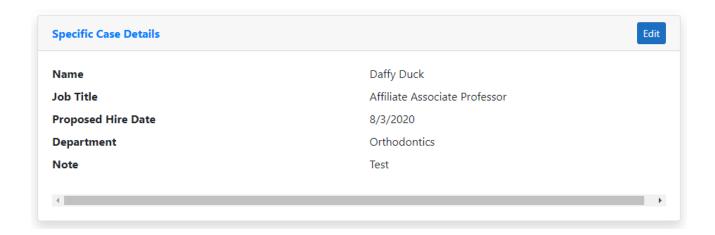
### Assign to Self



Similar to Reassign, the "Assign to Self" button allows you to take up the case from your group member and assign it to yourself, if you think you would be better suited to handle the Case, or if your group member is on a leave.



### Specific Case Details

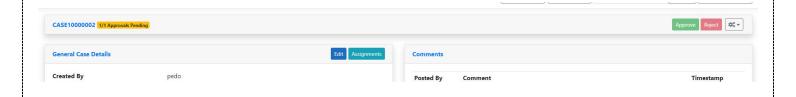


Specific case details are specific to the Case Type of the Case. You can edit these details until the Case is marked as processed.

A processed case means either it falls in one of the below mentioned Status categories:

- Approved
- Rejected
- Cancelled

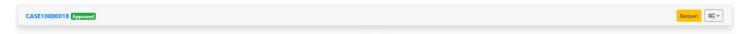
### Approvals/Rejections



On the area above the four sections, you would see the option to Approve/Reject a Case. These buttons would be enabled only if You are the assigned approver for the Case.

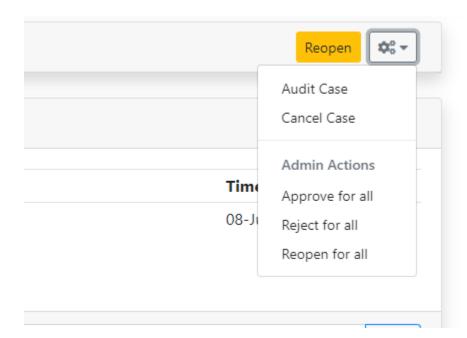
### Case Reopening

One you approve/reject the case, "Reopen" button will replace both of the Approve, Reject buttons.



Reopen will allow you to change your action if you feel.

### Case Cancellation

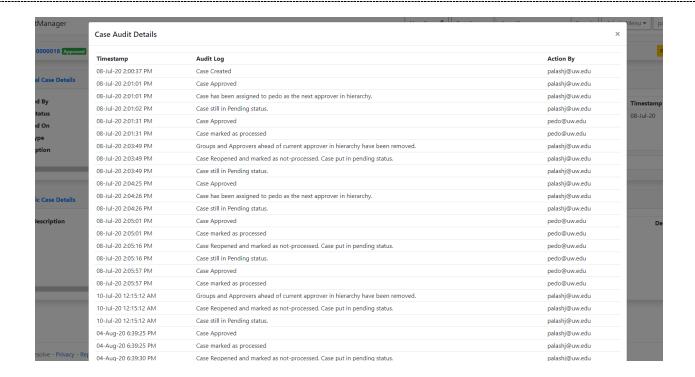


Besides the Approve/Reject/Reopen buttons, you would notice a Cogs buttons, providing further actions that you could take on the Case. You could audit the case as well as Cancel the case, if the request is no longer required.

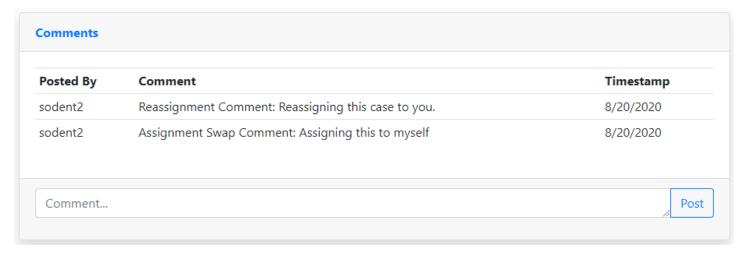
The admin actions would remain available only to Admins.

### Case Audit Logs

The audit case dialog shows all actions that have been taken on the Case from the time it got created.



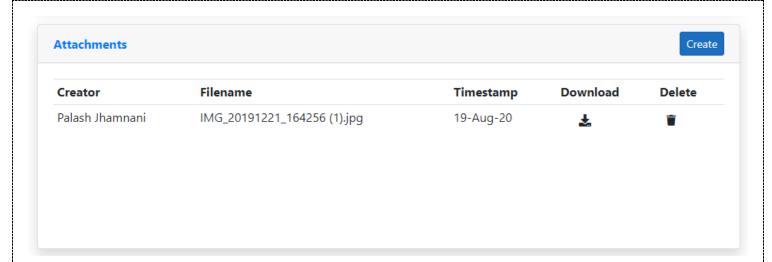
### Comments



Comments can be posted to the comments section. All stakeholder for the request will be notified when a comment is posted through email (if they have subscribed to email alerts)

### **Attachments**

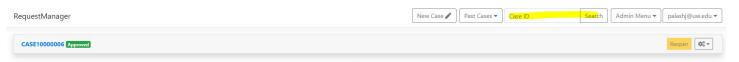
Attachments can be added to a case until the case is marked as processed.



There are options to download/delete the attachment during the time a case is being processed.

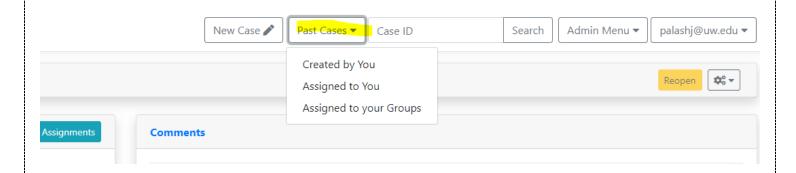
# Search

Additionally, you could search for a case using its Case ID

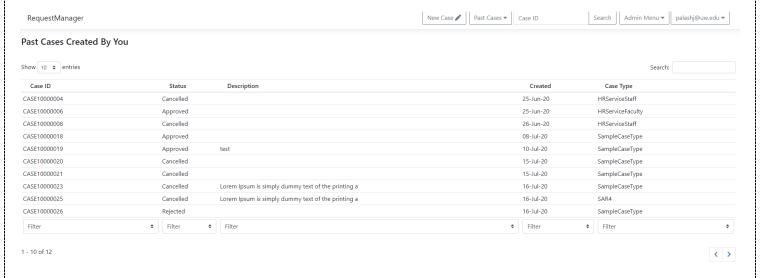


The Admin Menu will remain available only for the admins.

### Past Cases



Once the case is processed, it will not appear on your homepage anymore. If you need to refer to the details from the Case, you will need to use the Past Cases functionality. Similar to the sections on the homepage, you will be able to view past cases from all three categories.



# **User Preferences** Case ID New Case 🥒 Past Cases ▼ Search Admin Menu palashj@uw.edu • Preferences Sign out Search: You can select your preferences from under the email -> Preferences menu. **Email Preferences** Below are the categories to which you are currently subscribed, to recieve email notifications. To unsubscribe, uncheck the appropriate categories below. Receive Email Notifications: $\ \square$ When you create a new case, or a case is created on your behalf ☐ When a case is assigned to you (Pending for your action) ☐ When a case is assigned to your groups $\hfill\square$ When a comment is added to a case (For cases created by you or assigned to you) ☐ When an attachment is added to a case (For cases created by you or assigned to you) ☐ When a case created by you, or on behalf of you is marked as processed (Approved/Rejected) Customize the way your homepage looks, by choosing which sections to expand on launch: Keep "Cases Created by You" section expanded ☐ Keep "Cases Assigned to You" section expanded ☐ Keep "Cases Assigned to Your Groups" section expanded Save

Here, you could select your email preferences, as well as set your homepage defaults.