RequestManager – User Guide

Version 1.0

School of Dentistry

University of Washington, Seattle

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Revision and Signoff Sheet

Change Record

Date	Author	Version	Change Reference
21st July 2020	Palash Jhamnani	1.0	First Draft

Reviewers

Date	Reviewer	Version	Comments
	Anya L. Levysmith	1.0	

Contents

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.
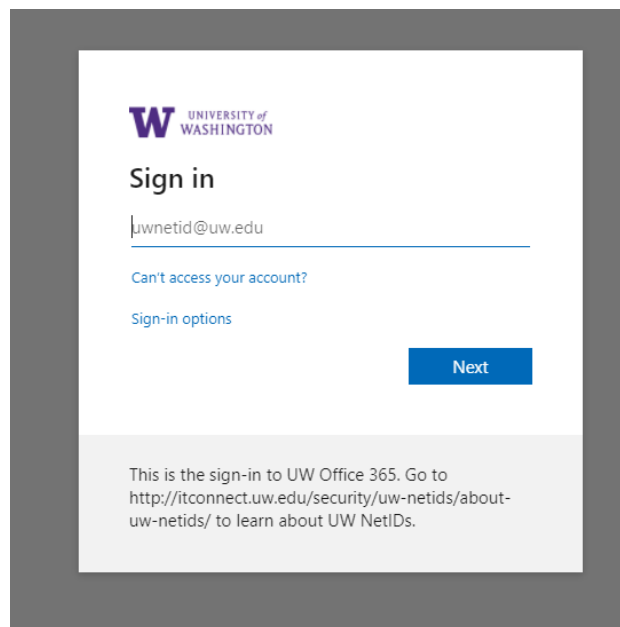
Authentication

Sign in

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

Application URL: https://apps.dental.uw.edu/Resolve

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 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.

RequestManager

New Case ✏ | Past Cases ▾ | Case ID | Search | pedo@uw.edu ▾

Preferences

Sign out

Cases Created by You 1

Show 10 ⇕ entries   Search: [   ]

Case ID	Pending On	Description	Created	Case Type
CASE10000002	sodent2	Test of Hiring Affiliate by Pedo	8/19/2020	HiringAffiliateFaculty
Filter	Filter	Filter	Filter	Filter

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Cases Assigned to You 1

Cases Assigned to Your Groups 2

Homepage

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

| RequestManager | | | | New Case ✏ | Past Cases ▾ | Case ID | Search | pedo@uw.edu ▾ |

⊖ Cases Created by You ❶

Show 10 ⇕ entries   Search: [_____]

Case ID	Pending On	Description	Created	Case Type
CASE10000002	sodent2	Test of Hiring Affiliate by Pedo	8/19/2020	HiringAffiliateFaculty
Filter ⇕	Filter ⇕	Filter ⇕	Filter ⇕	Filter ⇕

1 - 1 of 1   ‹ ›

⊕ Cases Assigned to You ❶

⊕ Cases Assigned to Your Groups ❷

© 2020 - Resolve - Privacy - Reporting   User Guide ▴

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"

RequestManager

Create Case

☑ OnBehalfOf

Select User (On whose behalf the request is being created):

| pedo@uw.edu | ⌄ |

Don't see the User? Create

Case Type

| SAR4 | ⌄ |

Description

| First 50 characters of this description will be visible on homepage for easy identification... |

Next

Cancel

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 Paid FTE to Unpaid Status ; Unpaid Status to Paid FTE All	
MoveWorker	HR Service Move Worker Staff/Student/Faculty	
SecurityRoleschange	HR Service Security Roles Change All	
Termination	HR Service Termination All	
Hiring Requests		
HiringAffiliateFaculty	*Hiring Request (Affiliate Faculty)* All affiliate faculty are unpaid.	
HiringFaculty	*Hiring Request (Faculty)* Please review Faculty Hiring Procedures 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)*	

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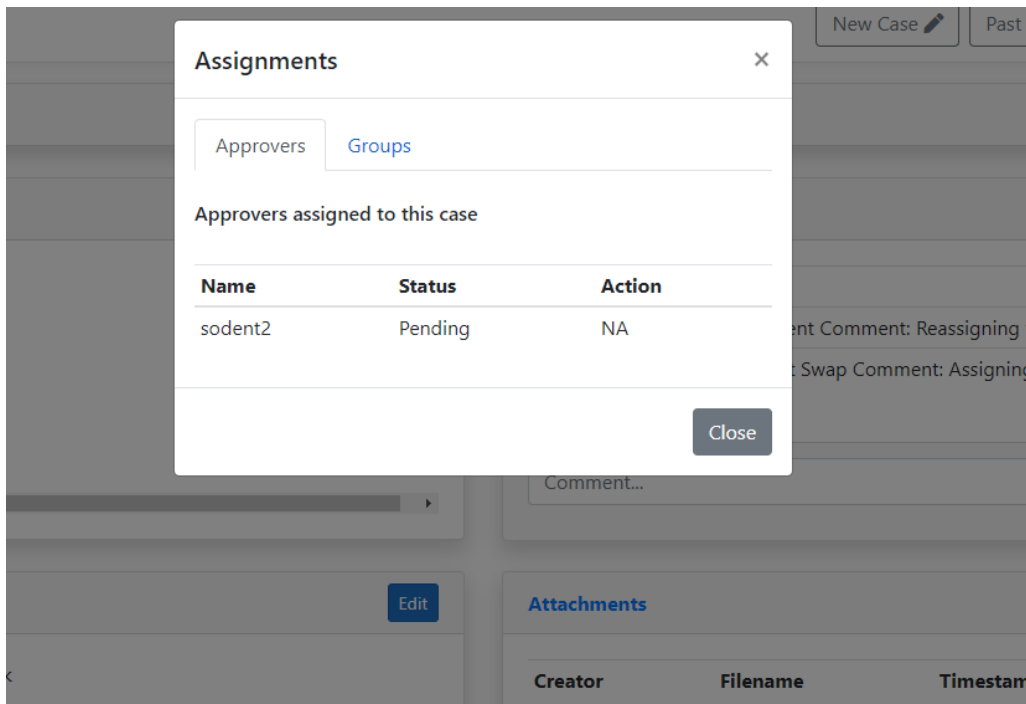
Here you can see the Status of the approver, which can be either Pending, Approved, Rejected or Cancelled. Under the Action column, you can see 3 options, either "NA", or "Reassign" or "Assign to Self". NA signifies that no action can be taken for that approver by you. The other 2 options are as described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

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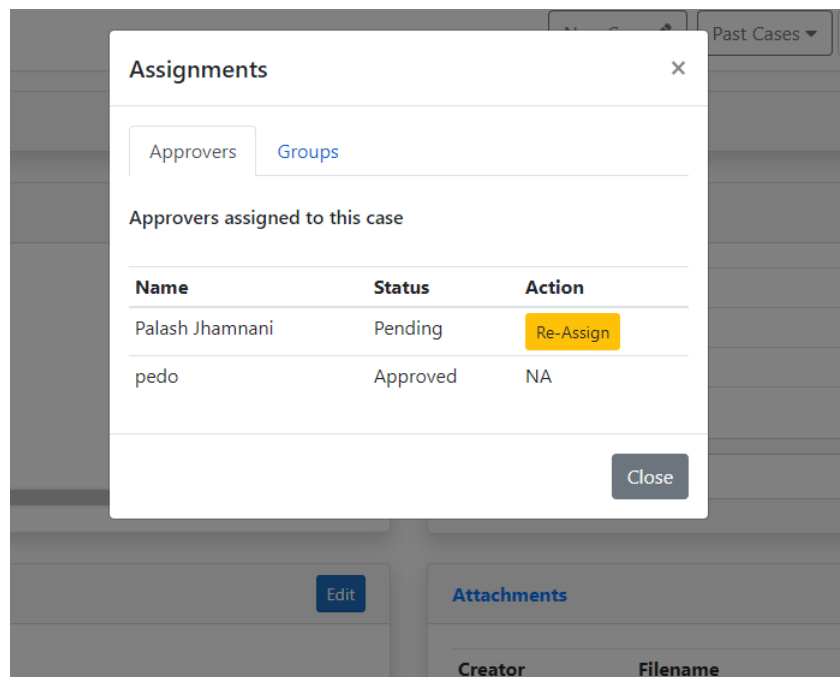
When this button appears, you (as an approver, if you are one to whom the case is assigned to) can reassign the case to someone else from your within your group who you feel knows more about the case and would be better suitable to handle it.

RequestManager

Reassign Case - CASE10000058

Select a group member from group: uw_sod_webapps_resolve-admins

[▾]

[Optional Comment...   ]

[Reassign]

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.

Swap Approver with Self?   ✕

```
┌─────────────────────────────────────────┐
│ Comments...                             │
│                                         │
│                                         │
└─────────────────────────────────────────┘
```

Cancel   Save

Close

Specific Case Details

Specific Case Details   Edit

Name	Daffy Duck
Job Title	Affiliate Associate Professor
Proposed Hire Date	8/3/2020
Department	Orthodontics
Note	Test

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

CASE10000002 1/1 Approvals Pending   Approve Reject ⚙▾

General Case Details   Edit Assignments   **Comments**

Created By   pedo   Posted By   Comment   Timestamp

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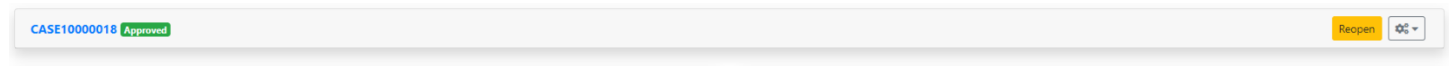
Reopen will allow you to change your action if you feel.

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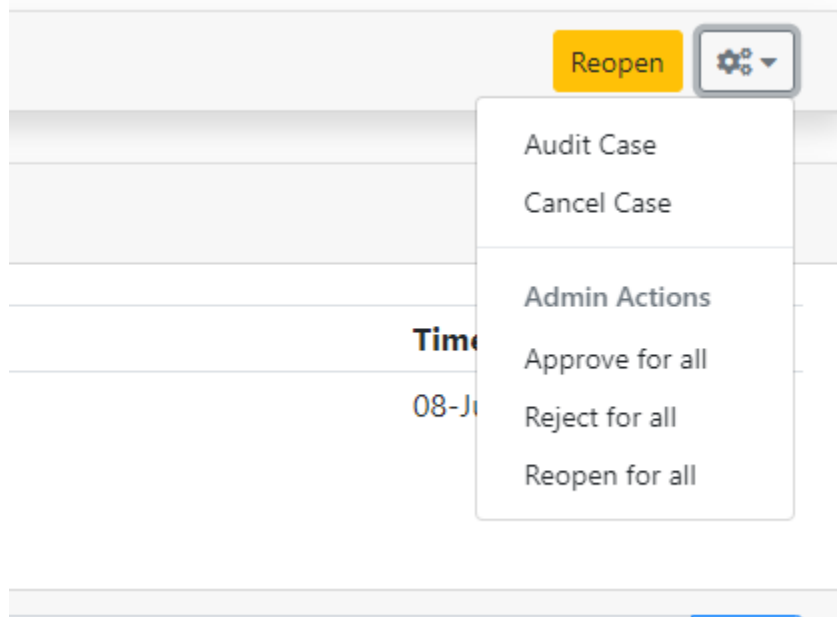
Besides the Approve/Reject/Reopen buttons, you would notice a Cogs buttons, providing further actions that you could take on the Case. You could audit the case as well as Cancel the case, if the request is no longer required.

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.

Case Audit Details ×

Timestamp	Audit Log	Action By
08-Jul-20 2:00:37 PM	Case Created	palashj@uw.edu
08-Jul-20 2:01:01 PM	Case Approved	palashj@uw.edu
08-Jul-20 2:01:01 PM	Case has been assigned to pedo as the next approver in hierarchy.	palashj@uw.edu
08-Jul-20 2:01:02 PM	Case still in Pending status.	palashj@uw.edu
08-Jul-20 2:01:31 PM	Case Approved	pedo@uw.edu
08-Jul-20 2:01:31 PM	Case marked as processed	pedo@uw.edu
08-Jul-20 2:03:49 PM	Groups and Approvers ahead of current approver in hierarchy have been removed.	palashj@uw.edu
08-Jul-20 2:03:49 PM	Case Reopened and marked as not-processed. Case put in pending status.	palashj@uw.edu
08-Jul-20 2:03:49 PM	Case still in Pending status.	palashj@uw.edu
08-Jul-20 2:04:25 PM	Case Approved	palashj@uw.edu
08-Jul-20 2:04:26 PM	Case has been assigned to pedo as the next approver in hierarchy.	palashj@uw.edu
08-Jul-20 2:04:26 PM	Case still in Pending status.	palashj@uw.edu
08-Jul-20 2:05:01 PM	Case Approved	pedo@uw.edu
08-Jul-20 2:05:01 PM	Case marked as processed	pedo@uw.edu
08-Jul-20 2:05:16 PM	Case Reopened and marked as not-processed. Case put in pending status.	pedo@uw.edu
08-Jul-20 2:05:16 PM	Case still in Pending status.	pedo@uw.edu
08-Jul-20 2:05:57 PM	Case Approved	pedo@uw.edu
08-Jul-20 2:05:57 PM	Case marked as processed	pedo@uw.edu
10-Jul-20 12:15:12 AM	Groups and Approvers ahead of current approver in hierarchy have been removed.	palashj@uw.edu
10-Jul-20 12:15:12 AM	Case Reopened and marked as not-processed. Case put in pending status.	palashj@uw.edu
10-Jul-20 12:15:12 AM	Case still in Pending status.	palashj@uw.edu
04-Aug-20 6:39:25 PM	Case Approved	palashj@uw.edu
04-Aug-20 6:39:25 PM	Case marked as processed	palashj@uw.edu
04-Aug-20 6:39:30 PM	Case Reopened and marked as not-processed. Case put in pending status.	palashj@uw.edu

Comments

Comments

Posted By	Comment	Timestamp
sodent2	Reassignment Comment: Reassigning this case to you.	8/20/2020
sodent2	Assignment Swap Comment: Assigning this to myself	8/20/2020

Comment...   Post

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.

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Attachments   Create

Creator	Filename	Timestamp	Download	Delete
Palash Jhamnani	IMG_20191221_164256 (1).jpg	19-Aug-20	⬇	🗑

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

RequestManager		New Case ✏	Past Cases ▾	Case ID	Search	Admin Menu ▾	palashj@uw.edu ▾
CASE10000006 Approved						Reopen	⚙ ▾

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.

RequestManager					New Case ✏	Past Cases ▾	Case ID		Search	Admin Menu ▾	palashj@uw.edu ▾

Past Cases Created By You

Show 10 ⇕ entries   Search: [   ]

Case ID	Status	Description	Created	Case Type
CASE10000004	Cancelled		25-Jun-20	HRServiceStaff
CASE10000006	Approved		25-Jun-20	HRServiceFaculty
CASE10000008	Cancelled		26-Jun-20	HRServiceStaff
CASE10000018	Approved		08-Jul-20	SampleCaseType
CASE10000019	Approved	test	10-Jul-20	SampleCaseType
CASE10000020	Cancelled		15-Jul-20	SampleCaseType
CASE10000021	Cancelled		15-Jul-20	SampleCaseType
CASE10000023	Cancelled	Lorem Ipsum is simply dummy text of the printing a	16-Jul-20	SampleCaseType
CASE10000025	Cancelled	Lorem Ipsum is simply dummy text of the printing a	16-Jul-20	SAR4
CASE10000026	Rejected		16-Jul-20	SampleCaseType
Filter	Filter	Filter	Filter	Filter

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User Preferences

New Case ✏️ | Past Cases ▾ | Case ID | 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:

☐ 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

☐ 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.