



REQUESTERY

REQUESTERY FAQ

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FAQ

GENERAL INFORMATION

? Q: How will I know who submitted a Request?

If the request was submitted via email. The email address of this user will be visible in the External User field.

If the request got created using the new request option in the "Requests-Client" tab, the Requested By field, will display the name of the person who created the Request.

If the request is created using the "Requests-Admin" tab, the user will need to fill out the Requested By field.

? Q: Can I add more fields to the Requests?

Yes, fields can be added through Relativity, make sure you unlock the application in the application library and then create the fields needed as usual. Use the "Requests" object.

Requestery only supports: Long Text, Fixed Length Text, Single Choice, Multiple Choice, User, and Date fields for now.

Then, you can update the layout where you would like the application to show the created fields.

Note: Requestery relies in Relativity permissions. You must have permissions to add fields and edit layouts.

? Q: Can I update the layout in the Requests-Admin tab and the layout in the Requests-Client tab?

Yes. If you have permissions to edit layouts, you will see the edit icon on the bottom right of the request form, you can click on it and this will take you to Relativity's layout edit screen.

? Q: How many layouts does Requestery have?

Requestery manages 2 layouts, that can be modified:

1. Layout Requests Admin: This is the layout users will see when creating a new request from the Requests-Admin tab. The fields in this layout are intended to be visible for Requestery administrators.
2. Requests Client: This is the layout users will see when creating a new request from the Client-Admin tab. The fields in this layout are intended to be visible for requests' submitters.

? Q: Can I modify the fields that I see in the lists?

Yes, the fields in the lists can be modified using Relativity's views tab. Requestery manages 3 views, that can be modified:

1. All Requests - Admin View Dashboard
2. All Requests - Client View
3. All Requests - Admin View Dashboard - Assigned To Me

? Q: Which view do I see in the Requestery tab at the instance level?

- All Requests - Admin View Dashboard

? Q: Can the charts in the dashboard be modified?

No, this current version does not allow to modify the charts in the dashboard, however, this is in our roadmap.

? Q: Which fields does the quick search uses?

The quick search will look for requests using Id Number or Title

PERMISSIONS

? Q: Why all users that want to use Requestery need to have Admin Repository permissions?

Relativity permissions are verified using Relativity's API Permissions Manager. The Permissions Manager API requests this permission to check on the groups in a workspace, and the users within these groups, to read the Client of which each user belongs to. This way the application can identify which data should be shown to each user based on their Client.

? Q: Which permissions are used by the application?

Requestery access relies on Relativity's permissions. Below the list of permissions used by the application:

Instance Permissions:

Client -View

View Admin Repository

Workspace Permissions:

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Updated: 10/26/2020

Object Security:

- Request Subscription -View / Edit/ Delete / Add
- Requests - View / Edit/ Delete / Add*
- Requests Attachment -View / Edit/ Delete / Add*
- Requests Comments-View / Edit/ Delete / Add *

Tab Visibility:

- Requestery*
- Requests – Client*
- Requests – Admin*
- Request – Mail Settings*

Other Settings

- Clusters

? Q: Which permissions should be granted to requests submitters?

Instance Permissions:

View Admin Repository

Workspace Permissions:**Object Security:**

- Request Subscription -View / Edit/ Delete / Add
- Requests - View / Edit/ Delete / Add*
- Requests Attachment -View / Edit/ Delete / Add*
- Requests Comments-View / Edit/ Delete / Add *

Tab Visibility:

- Requestery*
- Requests – Client*

? Q: Which permissions should be granted to requests submitters?

Instance Permissions:

View Admin Repository

Workspace Permissions:**Object Security:**

- Request Subscription -View / Edit/ Delete / Add
- Requests - View / Edit/ Delete / Add*
- Requests Attachment -View / Edit/ Delete / Add*
- Requests Comments-View / Edit/ Delete / Add *

Tab Visibility:

- Requestery*
- Requests – Client*

? Q: What requests will users see in the Requests-Client tab?

The Request Client tab is intended for users whom will only submit and track their own requests. This tab will only display the requests created by the user, or requests created by users that belong to the same client, who this user belongs to.

? Q: What requests will users see in the Requests-Admin tab?

The Request Admin tab is intended for requests' administrators. This tab will display all the requests created, without restrictions.

E-MAIL INTEGRATION

? Q: How can I set an email account to receive and send email notifications with Requestery?

Requestery uses your email server's IMAP configuration to receive requests and to send updates on requests.

Please review with your email service provider IMAP settings

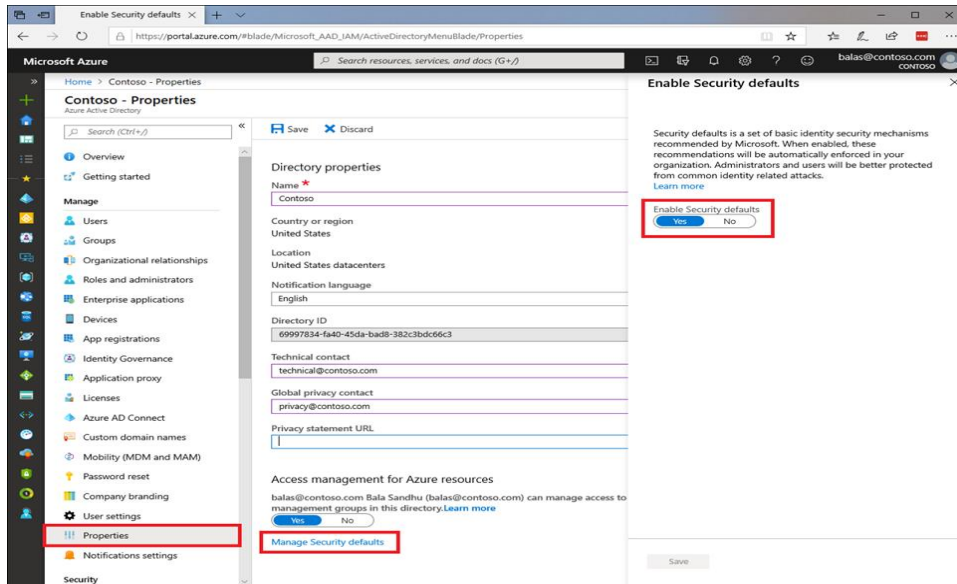
Below an example of how to configure an email account with Requestery

IMAP settings for Outlook: <https://support.microsoft.com/en-us/office/pop-and-imap-email-settings-for-outlook-8361e398-8af4-4e97-b147-6c6c4ac95353>

To set up an email address you will need to go to the Requests- Mail Settings tab in Requestery and fill in the following fields:

- **Server Name:** The server name will be found in your email IMAP settings. This would be your email server provider. I.e: outlook.office365.com
- **User Email:** This would be the email address used to receive requests via email. This email address will also be used to send out updates on requests. I.e: nseriotest@hotmail.com
- **Password:** Email address' password
- **Port:** 993. The port number will be found in your email IMAP settings.
- **SSL:** If your email service provider uses SSL, please set it to ON.

Also make sure Enable Security defaults in your account is set to Off



? Q: How users without Relativity access can create requests in Requestery?

Users without Relativity access can send an email to the email address configured in the Requests-Mail Settings, this email will automatically create a request in Requestery. The email Subject will be the Request Title and the body of the email will be the Description in the Request.

? Q: Do I get email notifications when changes are done in the request I submitted?

Yes, Requestery will automatically subscribe to updates the person that requested the ticket.

Mail notifications depend on having the mail settings stored.

? Q: Can other users different than the person who requested the ticket receive updates via email?

Yes, any user with access to the request can click on the subscribe button and receive email notifications with the updates.

Mail notifications depend on having the mail settings stored.