ICR Request Intake Form Quick Help

This is an excerpt from ICR Guide (Section 12)

1. ICR Request Intake Form

The VistA Office, Change Management pillar, ICR Team created the ICR Request Intake Form to better track ICR Requests and generate metrics for reporting to VistA Office leadership. The ICR Request Intake Form is the starting point for requesting an action to be taken on an ICR. Each ICR Request submitted from the ICR Request Intake Form is available to view from the ICR Request List (discussed in a section below).

1.1. How to Access the ICR Request Intake Form

The Edge or Chrome internet browser is recommended to access the ICR Request Intake Form. Internet Explorer will not work with this Intake Form.

Users can access the ICR Request Intake Form link from the following Sharepoint pages:

- VistA Office Customer Portal Sharepoint Page <u>VistA Office Customer Portal</u> (<u>sharepoint.com</u>)
- ICR Process and Standards Sharepoint Page <u>ICR Process and Standards (sharepoint.com)</u>
 Note: The ICR Team recommends the user save this link to the user's Favorites folder.

Users can also use the ICR Request Intake Form (direct link): <u>VistA Office - Integration Control Registration (ICR) Request Intake Form (sharepoint.com)</u>

1.2. ICR Request Intake Form – Blank Form

An ICR Request is submitted to the ICR Team using the ICR Request Intake Form.

Typically, one ICR Request should be entered for each ICR.

The ICR Intake Request should include information about what activity needs to occur related to the ICR:

- Questions about an ICR
- Review, approval, and activation of a new ICR
- Add new Subscribing Package to an existing ICR
- Add new Subscribing Package and request modifications to an existing ICR
- Existing Subscribing Package needs to modify an existing ICR definition
- Custodian Package needs to modify and existing ICR definition. Note: ICR contracts between Class 1 packages, so any change needs to consider the impact on existing Subscriber Packages.

Title of Request Date of Request 12/1/2021 & D * Requestor \$ III Project Manager & III Additional Recipients (GAL * III Entries) 2 III Additional Recipient Email(s) **Detailed Description of Request** IOC Date Project Patch(es) ICR Number **Custodial Package Subscribing Package** Software Class Type 'Other' Type Submit

Figure 1: ICR Request Intake Form - Blank Form

1.3. Instructions to fill out the ICR Intake form

Listed below are detailed directions to fill out the ICR Request Intake Form. Some fields may appear to be duplicates of information entered within the text of the Detailed Description of Request fields, but the separate fields are used to build the columns in the ICR Request List, VistA Office - ICR Request List - All Items (sharepoint.com) which can then be used to sort and search ICRs using column filters.

TITLE OF REQUEST: (Required) Enter the title of the request. The Title of Request should contain the ICR Number (if known), and brief text of the action requested. Examples of Title of Request are:

- "Request Activation of New ICR 6340" or
- "Request Modification of ICR 3731" or
- "WebVRAM Request to Subscribe to ICR 1629 XWB GET VARIABLE VALUE"

DATE OF REQUEST: This field is autogenerated to be the current date.

REQUESTOR: (Required) Enter the Requestor's name. Entering the Requestor's name can be performed by entering the full VA-associated email or enter name with the format "Lastname, Firstname", or use the browse function of the People Picker located to the right of the field.

The Requestor can optionally add other product team members that will receive the ICR Request's email message generated upon submittal. The requestor could also include the Custodian or Subscriber developer that the product team may have coordinated with and explain who the coordinated roles between the Custodian and Subscribing Package in the Description. Note: As an alternative to using the additional recipient fields in this form, the requestor can add additional recipients to the message string created by the ICR Request submission.

Other recipients the Requestor can include:

PROJECT MANAGER: Enter the Project Manager's name. Entering the Project Manager's name can be performed by entering the full VA-associated email, or enter name with the format "Lastname, Firstname", or use the browse function of the People Picker located to the right of the field.

ADDITIONAL RECIPIENTS (Global Address Lookup (GAL) ENTRIES): Enter up to 3 Additional Recipients who can be found in the GAL and need to be informed on the email message string related to this ICR request. Additional Recipients from the GAL can be added by entering the full VA-associated email or enter name with the format "Lastname, Firstname", or use the browse function of the People Picker located to the right of the field.

If more than three GAL recipients need to be added, then add them to the Email message To or Cc list, AFTER the ICR Request is Submitted.

ADDITIONAL RECIPIENT'S EMAIL(S): Enter the Additional Recipient's Email(s) for individuals not found in the GAL (such as Class 2 or Class 3 developers). Email entries in this field should contain the full email address. An example of an Additional Recipient's Email is <u>DEVELOPER.THREE@EXAMPLE.COM</u>.

DETAILED DESCRIPTION OF REQUEST: (Required) Enter a Detailed Description of Request. The ICR Requests can be general questions to the ICR Team or requests for actions to be taken for a new or existing ICR in FORUM.

If the ICR Request is regarding ICR actions, then the following information should be included

- What project needs this ICR
- What patch needs this ICR
- Pertinent background information about the functionality provided by the package which caused the need for the ICR
- Which Custodian package SME or Subscriber package SME was coordinated with before entering the ICR
- If a new ICR needs review and approval, include the ICR inquiry capture from FORUM

- o NOTE: Use the Paste as plain text to paste the capture, then select the captured text and change the font to Courier.
- If a modification is needed to an existing ICR, include the mockup of the modification from a copy of the original ICR inquiry capture
 - Use a word document or mail message (that you won't send) to paste in the ICR inquiry capture from FORUM
 - Mockup the changes and highlight all the changes to create the to-be version of the ICR.
 - When ready to submit the ICR Request, copy the mockup from the word or mail message and use paste as plain text to add the modified ICR capture to the description. Then change the captured font to Courier and add back the highlighting that identifies what modifications are being requested. (This text manipulation is due to limitations in the fonts that are recognized by Sharepoint tools.)
- Separate captures for as-is and to-be can be added to the description, but the highlight of what needs to be modified must be included in the to-be capture.

IOC DATE: Enter the IOC (Initial Operating Capabilities) Date, if known. This will help the ICR Team identify the urgency, if there is an influx of ICRs that need to be prioritized.

PATCH(ES): Enter any PATCH(ES) associated with this ICR Request. (e.g., DG*5.3*1071)

ICR NUMBER: Enter the ICR Number (if existing).

CUSTODIAL PACKAGE: Enter the name and/or namespace for the Custodial Package.

SUBSCRIBING PACKAGE: Enter the name and/or namespace for the Subscribing Package.

TYPE: Select the Type of request from the pull-down options. Options include File, Remote Procedure Call, Routine, SQL Table, or Other.

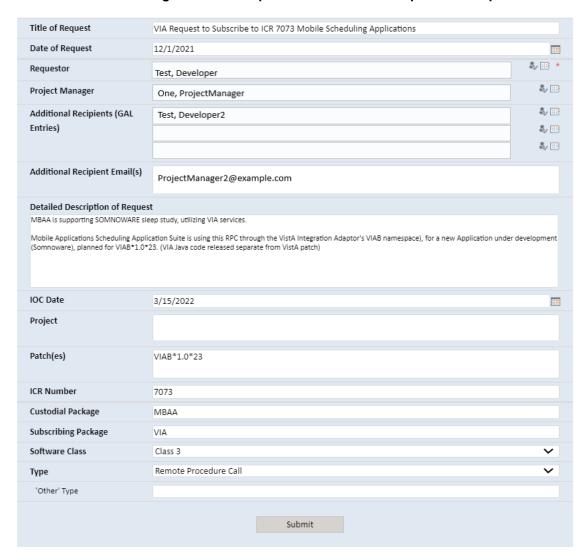
'OTHER' TYPE: If Type from Step 13 is Other, provide a brief entry of what is being accessed.

SUBMIT: After completing the form, click Submit which will automatically send out an Email Message to the ICR Team, the requestor, and other recipients entered by the requestor. NOTE: Once the ICR Request is submitted, it cannot be edited from the form. If edits need to be made to the request, then explain changes to the request in the email message string created for this ICR Request. The message response could include a new ICR capture with altered modifications. The message string becomes the history of the discussion and evolution of the final ICR.

1.4. ICR Request Intake Form – Completed Example

An example of a completed ICR Request Intake Form is provided in Figure 2.

Figure 2: ICR Request Intake Form - Completed Example



When the Submit button is clicked, a submission confirmation pop-up will appear, as shown in Figure 3.

Figure 3 ICR Request Intake Form Submission Confirmation

Submission Confirmation

Your ICR Request Intake form was successfully submitted.

The status of ICR Requests can be viewed on the VistA Office ICR Request List.

Please contact the **OIT DSO SPM Health VistA Office Integration Control Registrations** group at **ICRS@VA.GOV** if you have any questions.

To submit a new ICR Request Intake Form, click HERE

Additionally, when the Submit button is clicked, an Email message is autogenerated with the following information. This Email message will be the message string for further discussions related to this ICR Request. Additional recipients can be added as needed to the message string discussion by using a Reply to All action and adding the individuals in the TO: list.

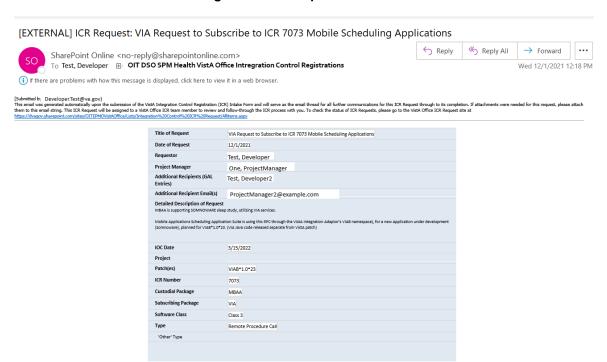
Subject: [EXTERNAL] ICR Request: "Title of Request"

From: Sharepoint Online <no-reply@sharepointonline.com

TO: OIT DSO SPM Health VistA Office Integration Control Registrations Mailgroup icrs@va.gov and Requestor. Additional recipients include Project Manager, Additional Recipients (GAL Entries), and Additional Recipient Email(s), if they were identified in the ICR request.

Figure 4 shows an example of the Email message generated.

Figure 4: ICR Request Generated Email



This email string will serve as the communication thread for all further communications for this ICR Request through to its completion. Upon receipt of the email, the ICR Request will be assigned to a VistA Office ICR team member to act upon the request.