KINETIC **REQUEST**

User and Management Guide

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KINETIC DATA

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Chapter 1 OVERVIEW

KINETIC REQUEST

Kinetic Request is a comprehensive tool for creating and administering requests of all types using BMC Remedy Action Request System®.

You can generate requests quickly across large or small groups with questions specifically tailored to them including approvals and ticket creation.

SERVICE REQUESTS USES

Use your requests for these and other purposes:

- Information Technology
- Human Resources
- Service Individuals
- Product Information
- Facilities Management

KINETIC DATA AND BMC PARTNERSHIP

As a BMC/Remedy user, you know that Remedy delivers service management software solutions that enable your organization to automate and manage internal and external service and support processes. As a BMC Solutions Partner, Kinetic Data delivers Remedy system enhancements expanding Remedy capabilities and processes that save you time while providing results faster and more efficiently.

KINETIC REQUEST USER AND MANAGEMENT GUIDE

This manual provides processes and procedures to create requests, their templates and questions, review completed requests and reports, set up users of Kinetic Request, as well as manage and administer requests for your organization.

WHO SHOULD READ THIS MANUAL?

NOTE

This manual is intended for Kinetic Request managers and users.

To use Kinetic Request, you must have user privileges. See Users and Groups Administration.

RELATED DOCUMENTATION

- Kinetic SR Installation and Configuration Guide
- Kinetic SR Integration Manual
- Kinetic Request Release Notes (if available)

Chapter 2 USERS AND GROUPS ADMINISTRATION

The purpose of this chapter is to provide Kinetic Request system administrators with definitions of user groups to apply within the Remedy user setup and security, which allows you to understand how to manage security. Typically, Remedy administrators assign and manage groups and users.

KINETIC REQUEST USERS AND GROUPS

Kinetic Request delivers seven user groups for user security setup. Please see your Remedy Action Request System documentation for more information on assigning Kinetic Request User Groups to users.

There are three types of users: Administrator, Request Manager and Request Inspector.

ADMINISTRATOR

This user has Remedy AR System Administrator permissions and is often the person that installed the application. The Administrator has access to all forms including background request configuration information and can add users and groups to the AR System.

REQUEST MANAGER

This user creates and modifies service items sent to customers. The number of Request Managers allowed for the system corresponds to the number of purchased Kinetic Manager licenses. This user must have the following groups added to their user record:

```
KS_SRV
KS_RQT_Manager
KS_MSG
KS_CORE
```

If Kinetic Task is used as the task processing engine, then the following group should also be added to the user record:

```
KS_TSK_Manager
```

REQUEST INSPECTOR

This user can view request results, add notes to requests and close requests. Kinetic Request does not limit the number of Request Inspectors allowed to access the system. This user must have the following groups added to their user record:

```
KS_SRV
KS_SRV_Inspector
KS_MSG
KS_CORE
```

REQUEST INTEGRATOR

This user has access to managing the integrations associated with Kinetic Request and may have more technical expertise in creating qualifications from a data source that funnels customer information into Kinetic Request. This role can, and often will, be the same person as a request manager.

```
KS_SRV
KS_SRV_Integrator
KS_MSG
KS_CORE
```

TASK MANAGER

This user has access to the Task Administration web console where you can diagnose and restart failed tasks. They can also access the Task Builder.

```
KS_SRV
KS_MSG
KS_CORE
KS_TSK_Manager
```

Table 1: Kinetic Request User Groups

Group Name	Group ID	Description
KS_SRV	10105	**Required**. All users must be assigned to the KS_SRV group to access the Kinetic Request application through the Remedy user tool. Customers completing requests from the web do not need to be members of any Remedy group.
KS_RQT_Manager	10350	Assign users to this group who create requests. **IMPORTANT:** Licensing is based on the number of users in this group. Each person assigned to this

Group Name	Group ID	Description
		group is required to have a Kinetic manager License. Contact your Kinetic Data sales representative for more licenses or any questions.
KS_RQT_Inspector	10355	Assign users to this group to view completed requests. This group cannot create or modify service items.
KS_SRV_Reporter	10307	Assign users to this group who create or modify request reports, but are not already part of the Request Manager or Remedy Administrator groups. This group has visibility to all request-related forms for reporting purposes. Use this group to give user access to all background forms for reporting, but not a Request Manager or Remedy Administrator.
KS_SRV_Integrator	10310	Assign to users who need access to create new integration points (data sources) for Kinetic Request.
KS_TSK_Manager	10381	Assign to users that need access to Task forms and are not Remedy Administrators.
KS_MSG	10110	Assign users to this group who create and modify request message text. Typically, these same users have KS_SRV_Manager permissions.
KS_CORE	10010	**Required**. All users must be assigned to the KS_CORE user group to access shared menus and forms across all Kinetic Data applications. Customers completing requests from the web do not need to be members of any Remedy group.

Chapter 3 CREATING REQUESTS

This chapter provides procedures for you to perform the following:

- Accessing the Request Manager
- Service Catalog Console
- Service Items – Finding, Creating, Cloning, and Deleting

ACCESSING THE REQUEST MANAGER

NOTE

The first time you access the Request Manager you might see the form listed as KS_RQT_Manager. Kinetic Request – Service Catalog Console is the alias for this form.

From one single place, the Request Manager, a user or manager can perform all typical request tasks. From the Request Manager, you can create requests, add questions, display options, monitor results, run reports, and much more.

TO ACCESS THE REQUEST MANAGER

Open the Remedy AR System User Tool. From the AR System User toolbar, select the **Open** icon.

Figure 1: Remedy Open Icon

-Or-

From the AR System User toolbar, select the **File** menu and **Open**.

1. The **All** tab of the **Object List** dialog displays, listing all Remedy forms.

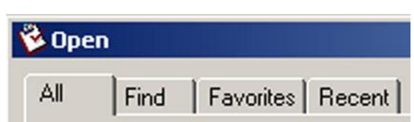


Figure 2: All Tab on the Object List Dialog

2. From the **All** tab list of the **Object List** dialog, highlight the form and double-click to select the Kinetic Request – Service Catalog Console Item.

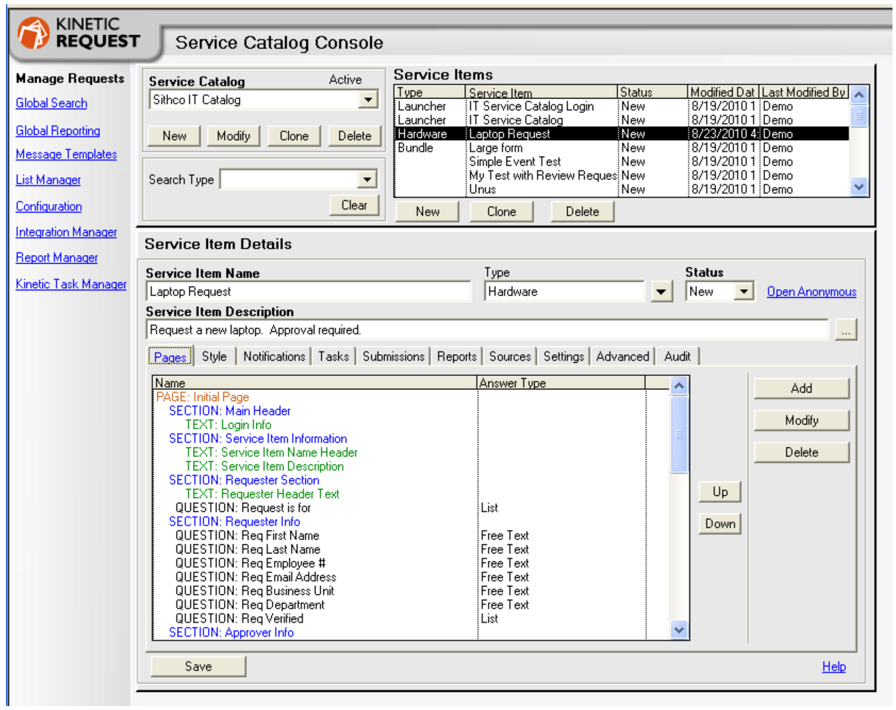


Figure 3: Service Catalog Console

SERVICE CATALOG CONSOLE

The Service Catalog Console offers a selection of all service items offered to your customers from a specific Service Catalog. From this console, you can set-up access and monitor the service items and their tasks and, ultimately, publish those items to your customers.

The **Service Catalog Dialog** that appears after clicking **New**, **Modify, Clone** or **Delete**, offers fields to set default permissions as well as monitor and direct service items created within a service catalog.

Caution! Deleting a Service Catalog **deletes all associated service items**.

If a Service Catalog is deleted by accident, contact your AR Administrator or Remedy Administrator, immediately. The Catalog is not officially deleted from the system for 24-hours and can be retrieved by your administrator if they are notified within that timeframe.

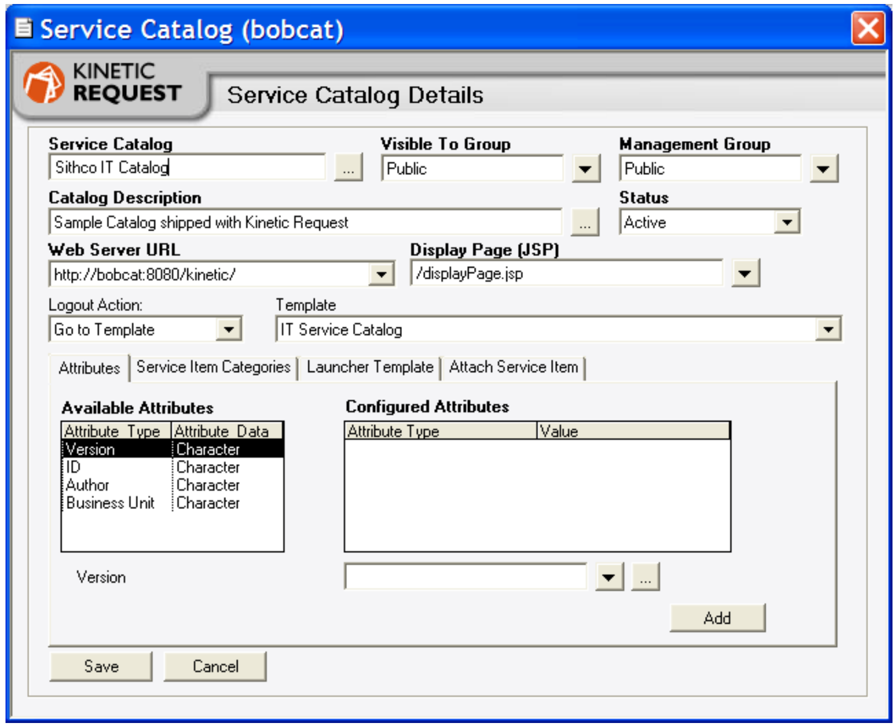


Figure 4: Service Catalog Dialog

The **Service Catalog** field defines the name of the catalog, and must be unique. **Visible To Group** sets the Remedy permission groups that will be able to view the catalog if you are using authentication. **Management Group** is the Remedy group that can create or modify the service items in that catalog. It is limited to one Remedy permission group, while **Visible To Group** can have multiple groups. Both fields default to Public.

Catalog Description is used as an internal description of the catalog, and **Status** defines whether the catalog is 'Active' or not.

Web Server URL and **Display Page (JSP)** default to the values in the Configuration Manager, but can be set to alternate values if needed, such as creating a web server specifically for external customers.

Logout Action and **Template** allow you to define a specific action/location for the logout option if you are using authentication. This is an option defined per service catalog.

Service Catalog Functions

The five tabs at the bottom of the Service Catalog Details dialog are used to add value and change the presentation of the Service Catalog.

Attributes Tab

Attributes are used to add information to your catalog without having to add fields to the form. Common uses for attributes are version numbers, or Requested by Department.

To add an attribute value, select the **Attributes** tab and highlight the attribute you want. Enter the value for the attribute in the field below the Configured Attributes table, and click **Add**.

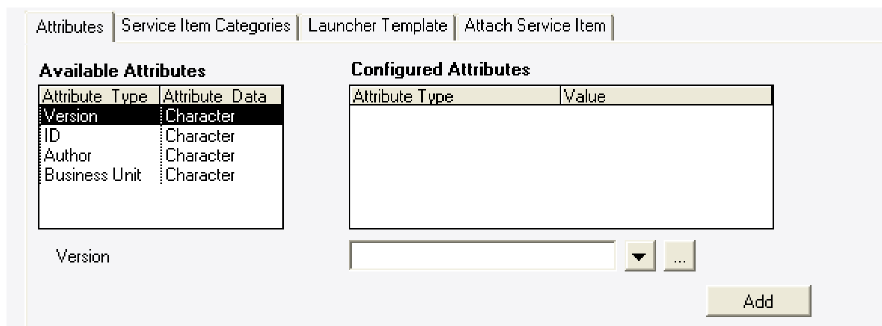


Figure 5: Attributes Tab

To modify or delete an attribute value, select it from the **Configured Attributes** table and either modify the value in the field below the table and click **Modify**, or just click **Delete**.

Service Item Categories

Service Item Categories gives users an easy way to display service items or templates within a service catalog. The items are ordered by priority with an integer value (i.e., 1 2, 3 or 100, 200, 500) to facilitate the process. Service items must be added to at least one category to be shown on the service catalog launcher portal, and they can be added to more than one category.

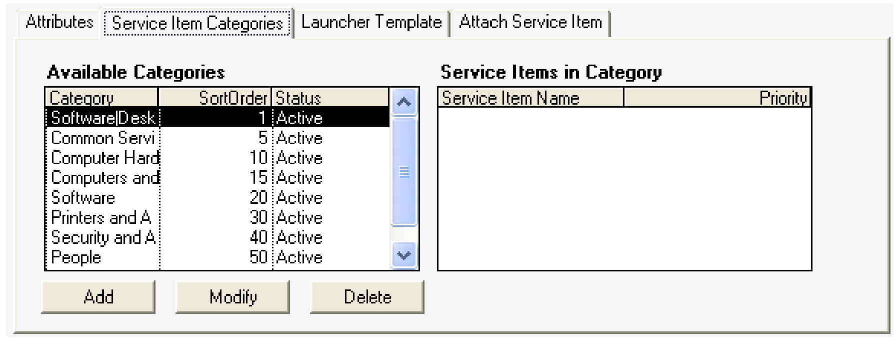


Figure 6: Service Item Categories Tab

Follow these steps to add a new category. You can double click on a category or use the **Modify** button to alter an existing category. Use the **Delete** button to remove a category. This will not delete the associated service items.

1. From the **Service Item Categories** Tab click **Add**. A dialog appears.

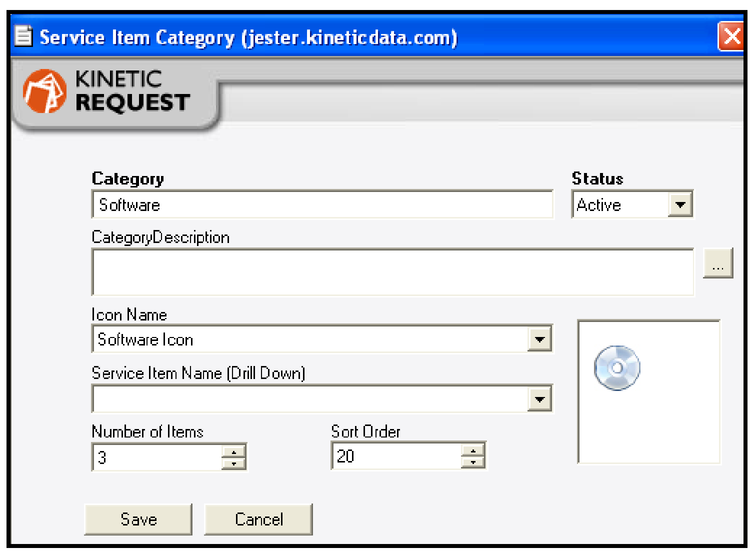


Figure 7: Service Item Category dialog

2. Enter a **Category** Name**.**

3. Enter a **Status** from the drop-down menu.

4. Enter a **Category Description**.

5. If applicable, choose an **Icon Name**. Icon pictures are held in the Kinetic Request Image Library. If you would like a new category icon it must be added to that library (System Defaults catalog).

6. Choose a **Service Item Name** from the drop-down menu.

   If the customer clicks on the name of the category, this is the service item that will be opened to display all the associated service items. It is also used to display more service items if the customer clicks on the **(more)** link in a category.

7. Select the **Number of Items** using the up and down arrows or type directly in the field.

   In order to help manage extensive lists of Service Items, the **Number of Items** field offers the ability to limit the number of service items displayed in a category.

   Example: An organization could offer a Service Catalog with hardware and software services. Each category could offer many service items. The **Number of Items** function allows a user to choose the top number of "priority" items to be viewed by a customer. The remainder could then be viewed as a full page (or pages), after clicking **(more)**, for example.

8. Choose a **Sort Order.**

   Sort order offers the ability to choose where a category will appear on a page. Categories are displayed left to right, top to bottom.

   Example: In the two previous Figures, the sort order for "hardware" is "10" so that will appear first. (The service items for that category appear in the window on the right side.) The sort order for "software" is "20" and will appear second, and so on.

9. If finished click **Save,** or **Cancel** to close without saving.

LAUNCHER TEMPLATE

A Launcher Template is the "web portal" that presents a catalogs service items to customers. Launchers are specialized service items. To add a new Launcher to your catalog, click the **Launcher Template** tab. A template named "IT Service Catalog" is provided. Enter a name in the **Launcher Template Name** field, and click **Generate**. When the name you entered disappears, the new launcher has been created.

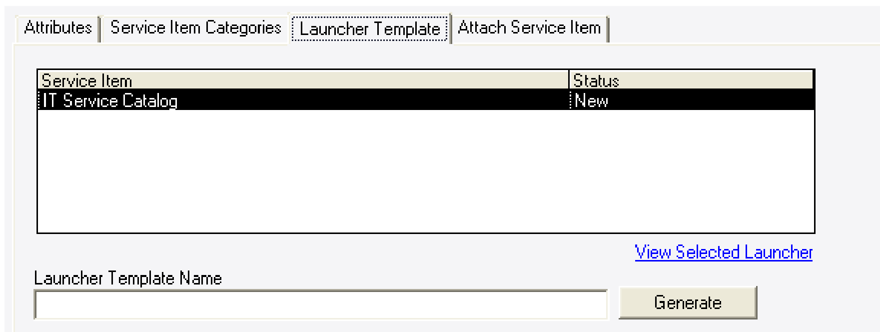


Figure 8: Launcher Template

EDITING YOUR LAUNCHER TEMPLATE

Even though Launcher templates are service items, they are designed with special components and it is important to understand that they cannot be edited the same way. Most of the layouts like text or a column, or the "fine tuning" elements, are managed through the Service Catalog Console, **Style Tab**. See **Add or Modify a Style.**

Layout elements like background colors, images, icons, banners, etc., can be edited or adjusted using **Style Sheets**. See **Cascading Style Sheets-Predefined Styles.**

ATTACH SERVICE ITEM

From the **Attach Service Item** tab, a service item can be cloned (copied) to the Service Catalog currently referenced, leaving a copy in the originating Catalog, or moved from one catalog to another.

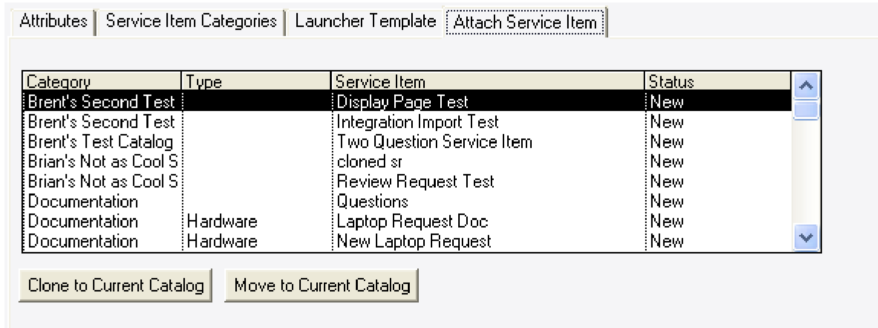


Figure 9: Attach Service Item Tab

1. Highlight the service item you want to copy or move.

2. Click **Clone to Current Catalog**, or **Move to Current Catalog**. Change your mind? Click **Cancel**.

3. Choose another service item and repeat or, if finished, click **Save.**

SERVICE ITEMS – FINDING, CREATING, CLONING, AND DELETING

A **Service Item** is an individual request (or form) to be filled out and submitted asking for a service, item or person. From the **Service Catalog Console** you can create, delete and search for service items:

- Finding Service Items
- Creating a New Service Item
- Clone Items
- Delete Existing

FINDING SERVICE ITEMS

The Service Catalog Console screen has four sections:

- At the top, the **Service Catalog** field allows you to select an existing item by using the drop-down list. Items are defined by your Administrator, and can include permission groups. For more information, see.
- The **Service Items** section displays request items currently available in the system.
- At the bottom, the **Service Item Details** section displays request item details highlighted in the top section.
- On the left-hand side of the screen are hyperlinks underneath **Manage Requests** for you to perform advanced functions on your requests.

TO SEARCH FOR A SERVICE ITEM

Use the **Search Type** field to narrow the available Service Items. This list shows all the Types currently available for the selected Service Catalog. To see all the Service Items for the selected Catalog, click the **Clear** button.

Details of the item selected from the table display in the lower half of the form.

Creating a New Service Item

Access the Service Catalog Console.

1. At the bottom of the Service Items table on the Service Catalog **Console, click the New button. The New Service Item dialog displays.**

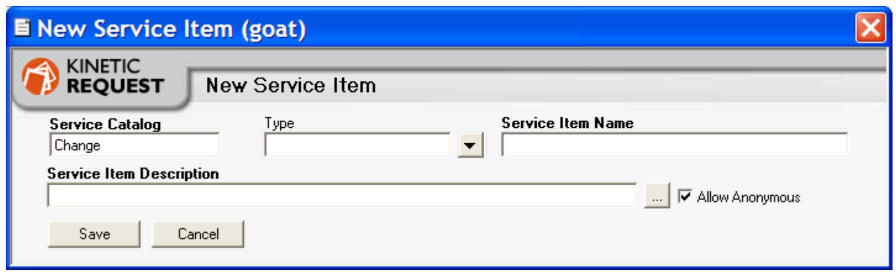


Figure 10: New Service Item Dialog

2. The **Service Catalog** is defaulted to the current Catalog, it cannot be changed.

3. In the **Type** field enter a type or select one from the drop-down list. Types are specific to an item and are not mandatory.

4. In the **Service Item Name** field enter a name for this item. The combination of Service Catalog and Service item name must be unique.

5. The **Service Item Description** field allows you to enter a short or lengthly description for this item. If you select the ellipses (**...**) adjacent to the field a dialog displays for you to enter more data.

   Allow Anonymous is checked by default. This setting is ideal for testing your Service Item during design and development and is the normal state for Service Items in Kinetic Request. Targeted Service Items (the alternative to Anonymous) is for Requests that are specific to a particular customer.

6. Click **Save**.

You can now begin to create questions and other elements for the request.

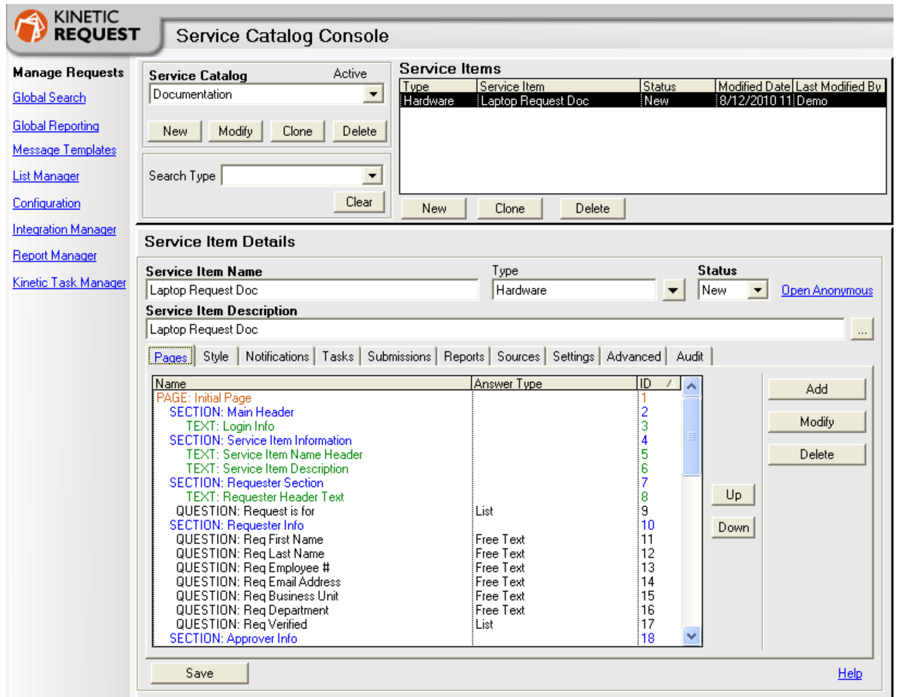


Figure 11: Service Catalog Console Window with Newly Created Request

Service Item Status Descriptions

Item status defines the item's state. This includes modes for testing, development, and inactivating.

Table 2: Item Status States Descriptions

Item Status	Description
New	This is the testing mode for the request. All functionality is available from this status. Changes are not audited in this status
Active	**Active** requests are requests that are in production. Modifying questions, integrations, and other configuration items are disabled as changes to an active request can skew request results or cause other unexpected issues. If a change needs to be made to an active

Item Status	Description
	request, you must click on the "Allow Modification" button in order to make any changes. Any changes are audited in this status.
Inactive	Participants can complete requests but new requests cannot be sent to participants.
Closed	This locks the request and changes cannot be made. New requests cannot be sent and requests in the field cannot be completed.
Delete	This deletes a request. You can only delete a **New** status request from the Request Manager.

Items can switch between **Active**, **Inactive** and **Closed** as often as needed. However, an item in the **Active**, **Inactive**, or **Closed** status <u>**cannot return**</u> to a **New** status. Before changing the **New** status to **Active**, be sure you are ready to deploy your request.

Make Changes to an Active Service Item

Once a service item is in an active state changes should no longer be made to it. However, there will be times when an active item must be changed.   **Any changes made to an active item will be audited.**

Change an Active Service Item

1. Select an Active status service item from the **Service Items** field.

2. Your item displays in the Pages tab. Notice that the Add, Modify, Delete and Page Editing buttons are disabled.

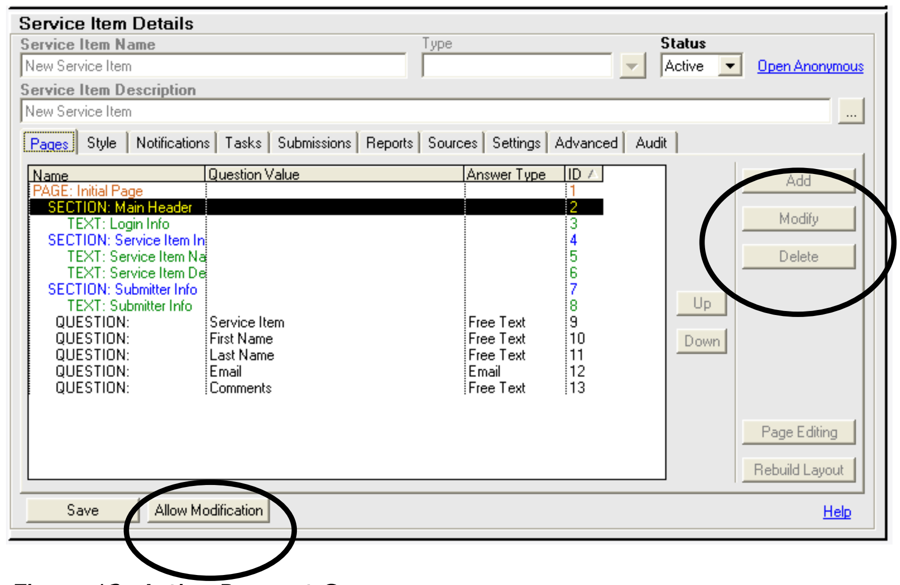


Figure 12: Active Request Screen

3. Click the **Allow Modifications** button.

4. The **Add**, **Modify**, **Delete** and **Page Editing** buttons are now active.

5. Make your changes. When prompted to save your changes, click the **Yes** button.

TIP

Use cloning of an existing service item to create similar new service items.

CLONE ITEMS

A cloned item copies all of the questions, notifications and attachments from the original item; it is an exact duplicate of the original request.

Cloning a service item is useful when creating requests for different locales, such as a U.S. English request and a French-Canadian request, or when you want to request at item for a particular period, such as to segment first quarter requests from second quarter's in order to make comparisons.

For reference, when you clone an original service item, the clone retains the Instance ID of the originating service item. Subsequently, if you clone a cloned service item, the cloned child retains the Instance ID of the originating service as well.

For example,

- If Library Request A is cloned the **Original Request Instance ID** for Library Request A-Clone is:

KS00D0B7A9C485fULjPwldyyEwDAUA

- If Library Request A-Clone is again cloned the **Original Request Instance ID** is also:

KS00D0B7A9C485fULjPwldyyEwDAUA

To Clone Service Items

1. Access the Request Manager.
2. Select the desired Service Catalog.
3. Highlight the name of the service item.
4. Click **Clone**.
5. A dialog will ask you to enter the name for the new service item
6. A new service item is created that is an exact duplicate, including notifications, attachments and questions. Wait until Cloning Complete message before closing the dialog.
7. Modify the clone as needed.

TECHNICAL TIP

To restrict managers from deleting requests, remove the KS_SRV_Manager permissions from the **Delete** button and status.

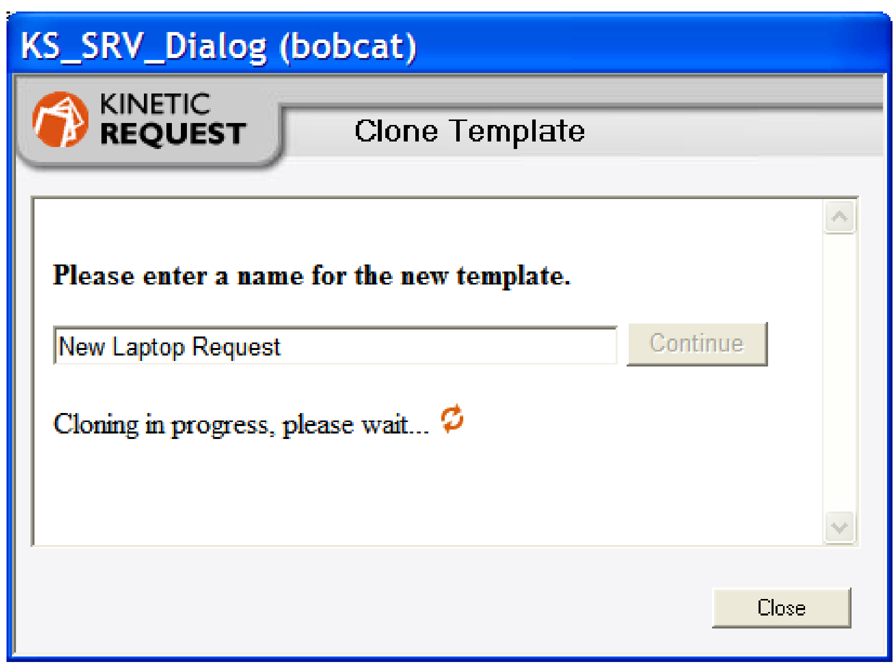


Figure 13: Cloning Dialog

To Delete Service Items

1. Access the Service Catalog Console.
2. Select the desired Service Catalog.
3. Highlight the name of the service item.
4. Click the **Delete** button.
5. Click the **OK** button when prompted with the dialog. Any deletes will be audited and can be viewed from the **Configuration** hyperlink on the left side list, and then click on the **Audit** page.

Caution! Deleting a service item **deletes all completed requests.**

If a service item is deleted by accident, contact your AR Administrator or Remedy Administrator, immediately. The item is not officially deleted from the system for 24-hours and can be retrieved by your administrator if they are notified within that timeframe.

Creating or Modifying Request Template Details

From the **Service Items Details** section of the Service Catalog Console you can create or modify request questions, set up notifications, establish rules, display options and more.

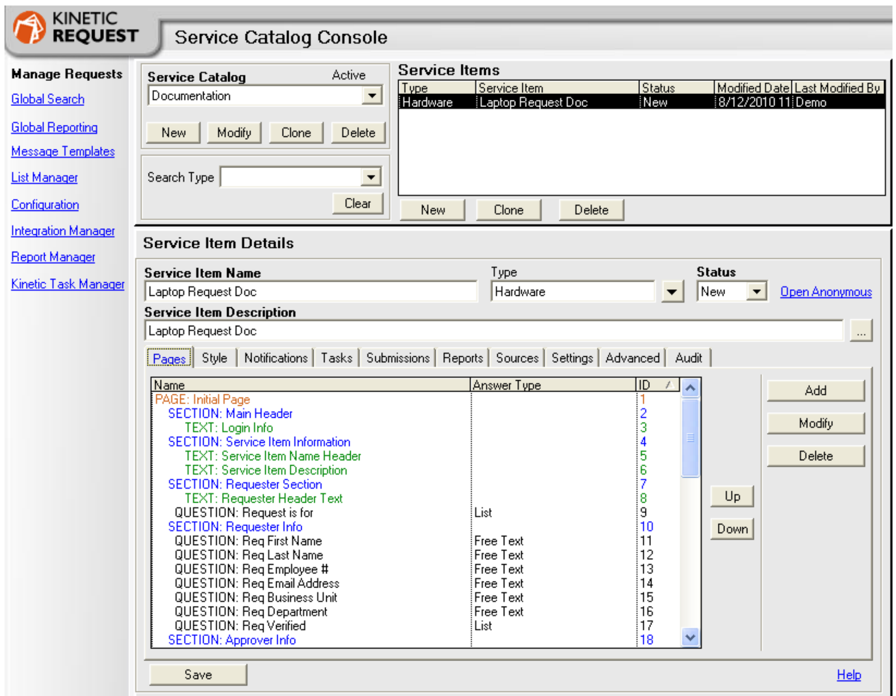


Figure 14: Request Template Details

In this section we describe procedures to create and modify the details of a service item. This section is organized by the tabs of the **Service Item Details** section of the *Service Catalog Console*.

- Pages Tab— Allows you to create questions, add images and text to your items and edit the look and feel of the Service Item.
- The Style Tab— Allows you to manage style information for your entire Service Item.
- The Notifications Tab— Allows you to create escalations to send to managers or others monitoring a request when a request is submitted. Also allows you to create reminders to send to request invitees when they have not filled out a request after a particular period of time.
- Tasks Tab — Allows users to configure tasks or actions to happen on submission of this form, such as creating records or approvals.

- Submissions Tab — Allows uyou to check on the status of requests.
- Reports Tab — Allows users to run reports against completed customer requests. Its functions are described in Request Reporting.
- Sources Tab — Allows you to configure integrations from other Remedy applications connected to this Service Item.
- Settings Tab— Allows you to configure other attributes related to a service item such as version, business unit, and other configured attributes.
- Advanced Tab — Allows additional formatting of your request, as well as additional advanced features.
- The Audit Tab — Allows you to view the changes to the request template including the change, person making the change, and the date/time.
- Archive Tab — Configure archiving for the specific service item.

THE PAGES TAB

The **Pages** tab displays information on the *elements* that make up your request. These elements include:

- **Pages:** Pages come in three types: the ***Contents***, ***Review Request***, and a ***Confirmation*** page. All of the elements below reside on a page.
    - Contents pages include questions and other elements including a **Submit** button. At least one contents page is required for a request.
    - Review Request pages hold read only copies of either previous pages on the same request, or requests from other service items. They can also have questions on them. This type of page is useful for reviewing data or approval requests.
    - Confirmation pages do not include questions or a **Submit** button but can include text and images. A confirmation page is not required. If a confirmation page is not included, the default confirmation page will be used.
- **Sections:** Sections are groupings of other elements that can include questions, text, and images. They are useful for events, as entire sections can be hidden or shown without having to hide or show individual elements. Sections are not required for a service item.
- **Questions:** Questions are the reason for any request. Questions can include different answer types, defaults, dynamic lists, and events. See the add new question section for more information. You can create new questions or copy questions from other requests.
- **Text:** Text can be static or dynamic text that is looked up from somewhere else in your request. For instance, you could include the person's name in the request or include an answer to a previous question.
- **Images:** Requests can include one or more images. Images may include a header image at the top of the page, or images within the body or footer, they can also be shared from one page to the next.
- **Copy Existing Element:** Elements can be copied from a service item to another.

CREATING ELEMENTS

From the **Pages** tab, elements can be created, modified and deleted. Elements can also be re-ordered and each page can be edited to change fonts, layout and more.

In order to add new elements such as questions and sections to your page use the **Add** button from the **Pages** tab.

1. Click the **Add** button.

2. A dialog displays where you can select the element type you want to add.

Figure 15: Select Element

3. Click the element you want to add and a dialog specific to that element displays.

Note: Each element will be discussed separately.

- Add New Question
- Add Page
- Add Section
- Add Text
- Add Image
- Copy Existing Element

ADD NEW QUESTION

When you select **Add New Question** from the Elements selector dialog, the question dialog displays.

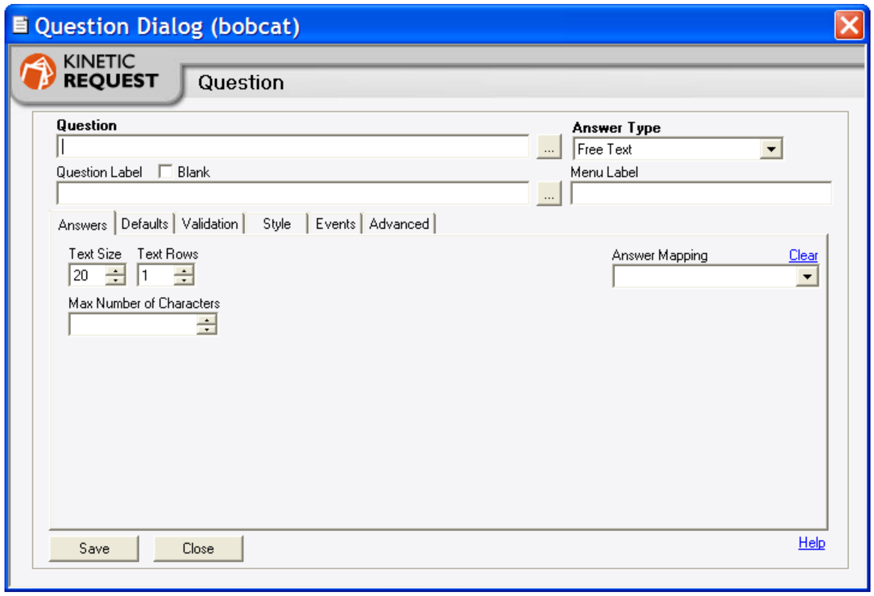


Figure 16: Request Question Dialog

Within the Question dialog you can create specific answer types, defaults, validate an answer, or create events from this question.

Tabs from the questions dialog are individually explained (i.e., Answers, Defaults, Validation, Style, Events, and Advanced).

1. Enter your question name in the **Question** field. This is what will be shown on any reports that are run against this request.

2. If needed, enter a **Question Label.** This is what shows up on the screen of the user. It can include any HTML markup. If this is not entered, the **Question** value will be inserted here.

Note: Click the **Blank** checkbox for a clear or empty label.

3. When a request author is referencing a question, the information in **Menu Label** will show in the various menus referencing this question. Examples include; page editor, creating qualifications, adding fields to a message template, etc. (By default, the question label will include the first 40 characters of the question field. If you

would like something more descriptive for menus you can enter it here.) The menu label must be unique within the service item.

4. Select an **Answer Type** from the drop-down list. This determines the type of answer returned to Remedy.

THE ANSWERS TAB

The **Answers** tab shows different fields based on the Answer Type chosen. These fields define the specific properties of the answer.

Answer Type

Depending on what you select from the **Answer Type** drop-down list you will see different options. For example, if you select **Free Text** you will see a different window than the **List** type. There are different Answer Types to select from and each one changes your screen to reflect data input needs. They are:

- Attachment
- Date
- Date/Time
- Decimal
- Dynamic List
- Email
- Free Text
- Integer
- List
- Numeric Range

Attachments

Attachment questions allow users to add attachments on request submissions. File size can be restricted as well as file types using this type of question.

1. Select **Attachment** from the drop-down list adjacent the **Answer Type** field.

2. The Answers tab repopulates with new fields.

3. Adjust the **Text Size** . This is the size of the field that holds the file name of the attachment.

4. As an option, click the drop-down menu for **Answer Mapping.**

   A valuable tool offering the ability to map an answer into a request base record, **Answer Mapping** is accessible from all **Answer Types**. As an example, in a request where one of the questions is "First Name", the answer can be stored as a normal answer, and it can also

NOTE:

Answer Mapping is a valuable tool that requires a little careful planning to assure intended results.

Multiple questions can be mapped to the same field but it is important to understand that the last value submitted is written or stored into that field.

Example: If you have a validation status question on Page 1 and a validation status question on Page 2 and they are filled out in both situations, Page 2 will override Page 1.

be stored in the "First Name" field of the customer request record, making it accessible for reporting and messaging purposes.

Another useful example would be in triggering additional workflow. For instance, a question such as "Do you approve this request?" could be mapped into the "Validation Status" field on the customer request record.

5. **File size limit** is set to default at 1024 kb (1 MB).

   Before changing the **File size limit** field, check with your Remedy Administrator as to the volume of attachments you are expecting to avoid overwhelming the database.

6. If needed, click **Enforce Field Types** and select a file type from the **Types Allowed** drop-down list. Choices are.doc, .gif, .pdf, or .xls files**.** Other file types can be added by your Administrator. Multiple file types can be selected, but should be separated by a space.

7. If needed, change either the **Upload label** or **Clear label**. These values show up on buttons next to the field where users can select an attachment to include in the request.

8. Click the **Save** button if you are done editing the question. If not continue on to the other tab descriptions.

-Or-

9. Click **Close** button if you do not want to save your data.

Date

By default, a Date question displays three fields, year, month, and day. You also have the option of displaying a date widget, and the actual date value. When a date question is submitted by a user, Kinetic Request formats the date in a standard ISO format – YYYY-MM-DD, even though the date displayed on the form is Day Name, Month Name Day, Year (Friday, October 1, 2010). Date questions always default to the current date.

1. Select **Date** from the drop-down list adjacent the **Answer Type** field.

2. The **Answers** tab repopulates with new fields.

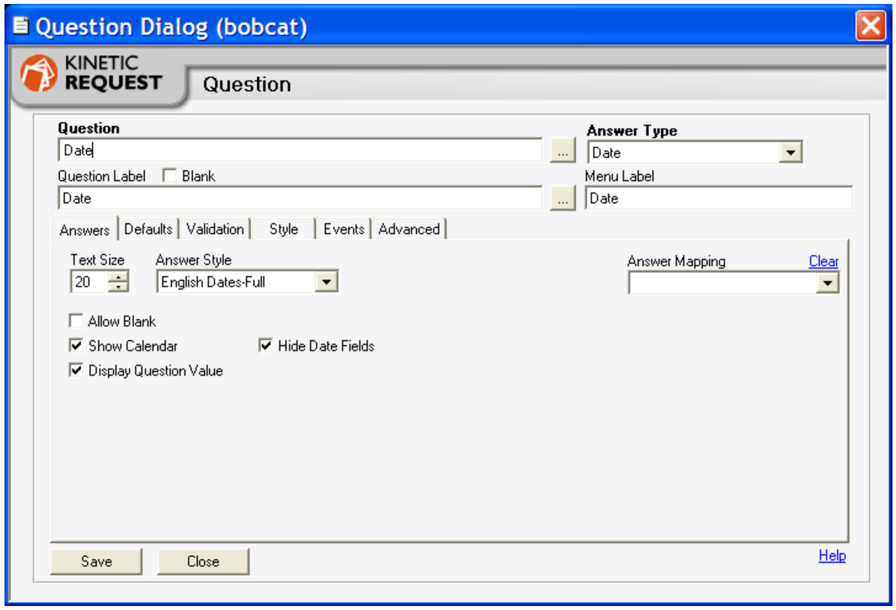


Figure 17: Date Answer Type fields

3. Select a text size. Only needed if you select Display Question Value (see below). This sets the width of the Display Question Value field.

4. Click on the drop-down list adjacent the **Answer Style** field and select the appropriate language. This refers to the list of months. New languages can be added by adding new lists to the template "Locale Specific Dates-Survey" in the SYSTEM_DEFAULTS category.

5. Click the **Allow Blank** check box to allow users to submit a blank date field.

6. Click the **Show Calendar** check box to display a calendar widget on your survey.

   - You can chose to hide the standard date fields and just show the calendar widget by selection **Hide Date Fields**.

7. Click the **Display Question Value** check box to display the date.

8. Select an **Answer Mapping** if desired. Answer Mapping will map the answer from this question back into one of the request base fields. See **Answer Mapping** under the **Attachment** section above for details.

Date/Time

The Date/Time answer type is an expansion of the **Date** answer type to include time. By default, a Date/Time question displays six fields, year, month, day, hour, minute, and AM/PM. You also have the option of displaying a date/time widget, and the actual date/time value. When a date/time question is submitted by a user, Kinetic Request formats the date in a standard ISO format – YYYY-MM-DDTHH:MM:SSZ, even though the date displayed on the form is Day Name, Month Name Day, Year Hour:Minute:Seconds (24 hour time format). Date/Time questions always default to the current date and time.

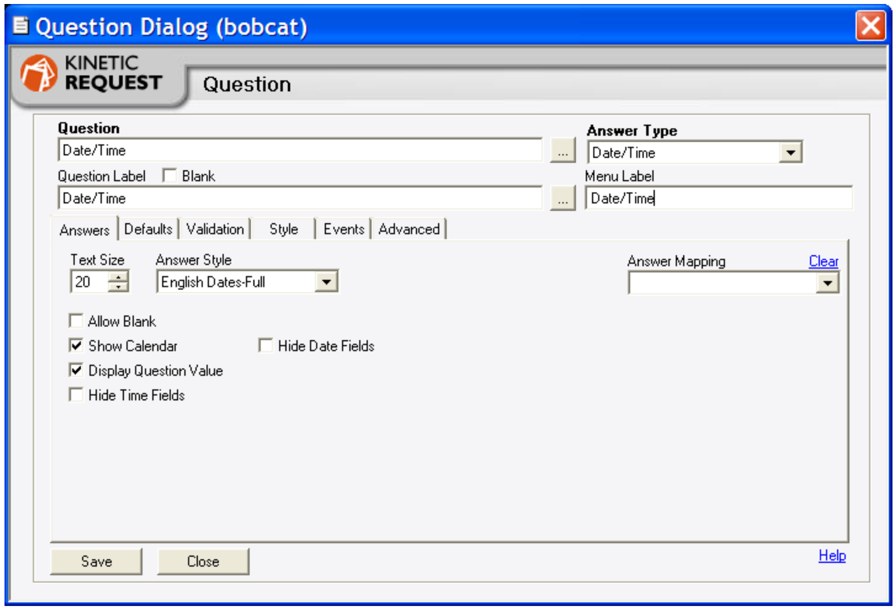


Figure 18: Date/Time Question Dialog

1. Select **Date/Time** from the drop-down list adjacent the **Answer Type** field.

2. The **Answers** tab repopulates with new fields.

3. Select a text size. Only needed if you select Display Question Value (see below). This sets the width of the Display Question Value field.

4. Click on the drop-down list adjacent the **Answer Style** field and select the appropriate language. This refers to the list of months. New languages can be added by adding new lists to the template "Locale Specific Dates-Survey" in the SYSTEM_DEFAULTS category.

5. Click the **Allow Blank** check box to allow users to submit a blank date/time field.

6. Click the **Show Calendar** check box to display a calendar widget on your survey.

a. You can chose to hide the standard date/time fields and just show the calendar widget by selection **Hide Date Fields**.

7. Click the **Display Question Value** check box to display the date.

8. If you just want to show the date fileds, or want to just use the calendar widget, select **Hide Date Fields**.

9. Select an **Answer Mapping** if desired. Answer Mapping will map the answer from this question back into one of the request base fields. See **Answer Mapping** under the **Attachment** section above for details.

Decimal

Decimal questions only allow a user to type in numbers and a period. If a non-numeric character is attempted, the user will be prompted with a message. This message can be overridden by changing the corresponding field on the Validation tab.

Select **Decimal** from the drop-down list adjacent to the **Answer Type** field.

1. The **Answers** tab repopulates with new fields.

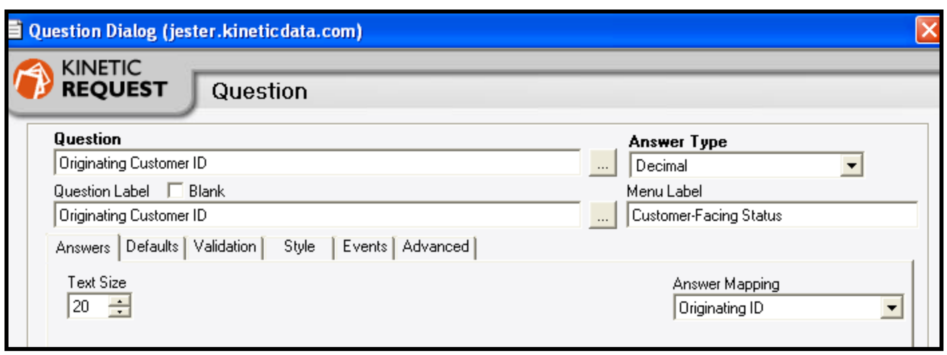


Figure19: Decimal Answer Type View

2. Select the **Text Size** for the decimal field which will appear on the request.

3. Select an **Answer Mapping** if desired. Answer Mapping will map the answer from this question back into one of the request base fields. See **Answer Mapping** under the section on **Attachment above** for details.

4. Click the **Save** button if you are done editing the question. If not continue on to the other tab descriptions.

   Or

5. Click **Close** button if you do not want to save your data.

Dynamic List

Dynamic Lists are questions where the list/menu shown to the user is dynamically generated via a Remedy qualification. This is similar to a "Search" menu in the AR System. What is shown to the user may be different for every user including the context displayed.

In addition, you may want to use this to reference data in other forms instead of re-typing them into Kinetic Request. An example of this would be a list of States/Provinces.

It is important to note that the dynamic list is generated when the request page is displayed. Therefore, you cannot have dependent dynamic list menus within the same page (one menu dependent on the answer to a question on the same page – see the Populate Menu event for this).

Dynamic lists will only show unique values on the list menu, so if you have two entries that are identical, it will only show one.

1. Select **Dynamic List** from the drop-down list adjacent the **Answer Type** field.

2. The **Answers** tab repopulates with new fields.

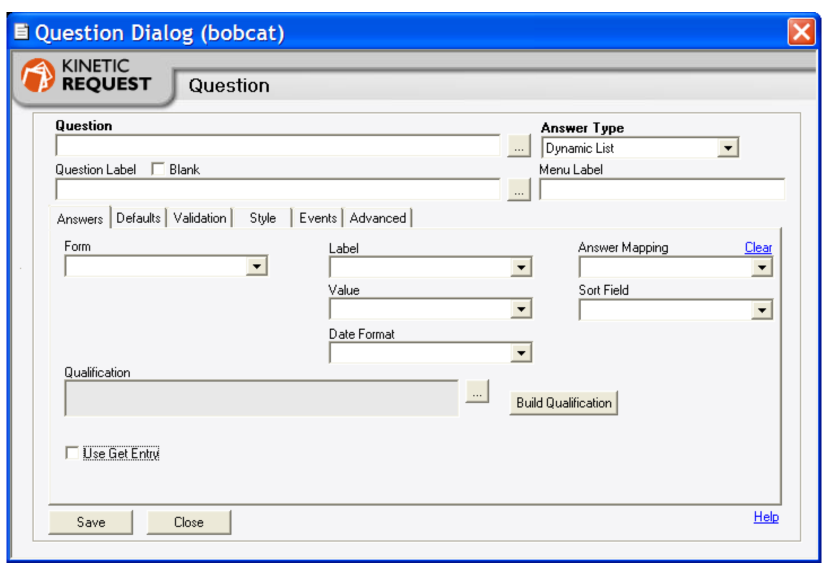


Figure 20: Dynamic List, Answer Type View

TIP:

In order to sort by the original value, choose **Request ID**.

Option: To sort by the label versus the given value, choose the same field as that on the label. Auto type will sort by the label, even though the new value may show different answers.

3. Select a form from the drop-down list adjacent the **Form** field. This list includes all the forms you have acces to on the Remedy server.

4. Select a **Label** from the drop-down list of fields on the form selected. The label is what is shown to the customer.

5. Select a **Value** from the drop-down listof fields on theform. The value cooresponds to a specific label, and is what is actually stored in the Remedy database.

6. If your list is going to show date/time, select a format from the **Date Format** drop-down.

7. Select an **Answer Mapping** if desired. Answer Mapping will map the answer from this question back into one of the request base fields. See **Answer Mapping** under the section on **Attachment** for details.

8. As an option, select a **Sort Field** from the drop-down menu, or use the same field as the label or value.

Note: Sort Field can be, but doesn't have to be, the same as the value in the label.

9. Click the **Build Qualification** button to enter qualifications into the dialog box that displays.

Note: Qualifications using fields from your request (either Base information or answers will appear as <FLD>MenuLabel, Field/Id</FLD>

10. If you want the Dynamic List question to trigger Remedy 'Get Entry' workflow, check the box for **Use Get Entry**.

11. Click the **Save** button if you are done editing the question. If not continue on to the other tab descriptions.

Or

12. Click **Close** button if you do not want to save your data.

Email

Email questions will display as a normal text field on a survey. When the customer moves focus away from the field, pattern matching will check for a valid email address (see the pattern on the validation tab for specifics).

1. Select **Email** from the drop-down list to **Answer Type.**

2. The **Answers** tab repopulates with new fields.

3. Select the **Text Size** for the email field which will appear on the request.

4. Select an **Answer Mapping** if desired. Answer Mapping will map the answer from this question back into one of the request base fields. See **Answer Mapping** under the section on **Attachment** for details.

5. Click the **Save** button if you are done editing the question. If not continue on to the other tab descriptions.

Or

6. Click **Close** button if you do not want to save your data.

Free Text

Free text questions allow users to type any characters into a field. This field can be multiple rows (a text area in HTML) or a single row. These types of questions can also be mapped back into a field on the request, such as First Name or Last Name.

1. Select **Free Text** from the drop-down list adjacent the **Answer Type** field. Use this when you want the respondent to provide a written response. Styles can be added.

2. The **Answers** tab repopulates with new fields.

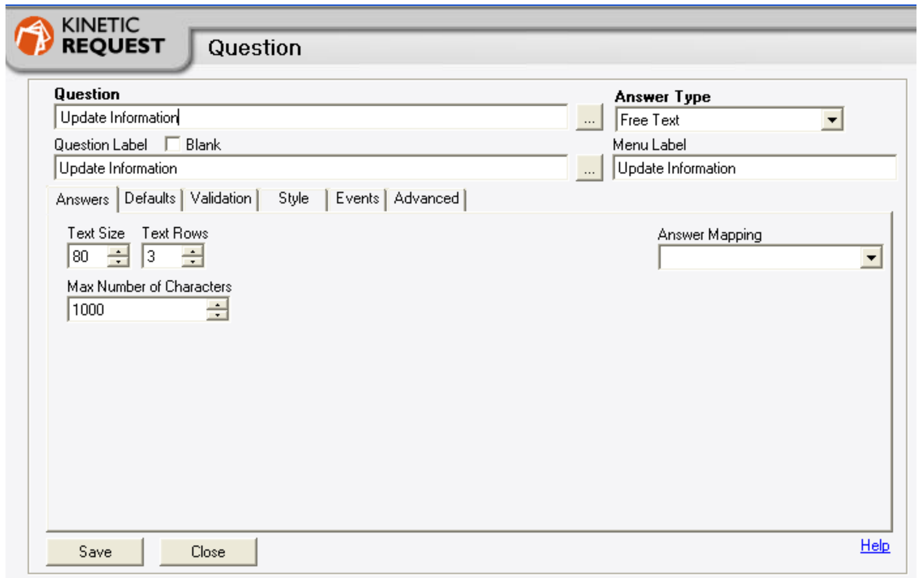


Figure 21: Free Text Answer Type View

3. Use the arrow keys adjacent the **Text Size** field or type a number to select a specific point size for the answer text.

4. Use the arrow keys adjacent the **Text Rows** field or type a number to select a specific number of rows allowable for the answer text.

5. Enter a value into the **Max Number of Characters** field to limit the number of characters that can be entered into the field.

6. Select an **Answer Mapping** if desired. Answer Mapping will map the answer from this question back into one of the request base fields. See **Answer Mapping** under the section on **Attachment above** for details.

7. Click the **Save** button if you are done editing the question. If not continue on to the other tab descriptions.

Or

8. Click **Close** button if you do not want to save your data.

Integer

Integer questions will allow any integer to be entered into the field on the survey. If a non-numeric character is attempted, the user will be prompted with a message. This message can be overridden by changing the corresponding field on the Validation tab.

1. Select **Integer** from the drop-down list adjacent the Answer Type field.

2. The **Answers** tab repopulates with new fields.

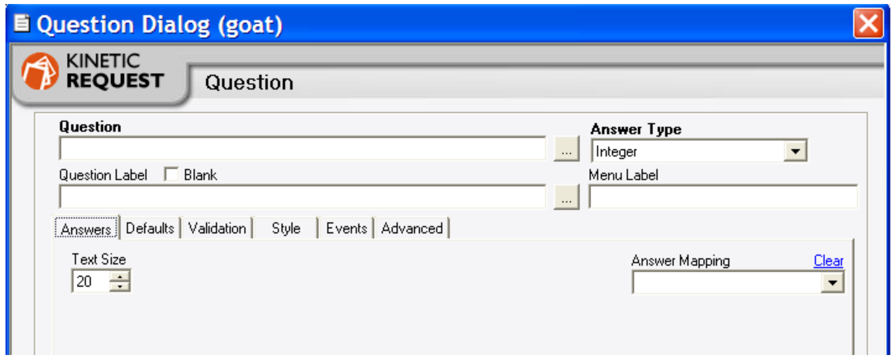


Figure 22: Integer Answer Type View

3. Select the **Text Size** the user will see when displaying this integer field.

4. Select an **Answer Mapping** if desired. Answer Mapping will map the answer from this question back into one of the request base fields. See **Answer Mapping** under the section on **Attachment above** for details.

5. Click the **Save** button if you are done editing the question. If not continue on to the other tab descriptions.

Or

6. Click **Close** button if you do not want to save your data.

List

List questions are a pre-defined set of items that a request respondent can choose. You can set the order that these items appear and have a score attached to each item. Lists can be re-used within a request.

You can also set a "Not Applicable" value, meaning that a user can select this item, but it will not be counted in the overall score of the request.

1. Select **List** from the drop-down list adjacent the Answer Type field.

2. The **Answers** tab repopulates with new fields.

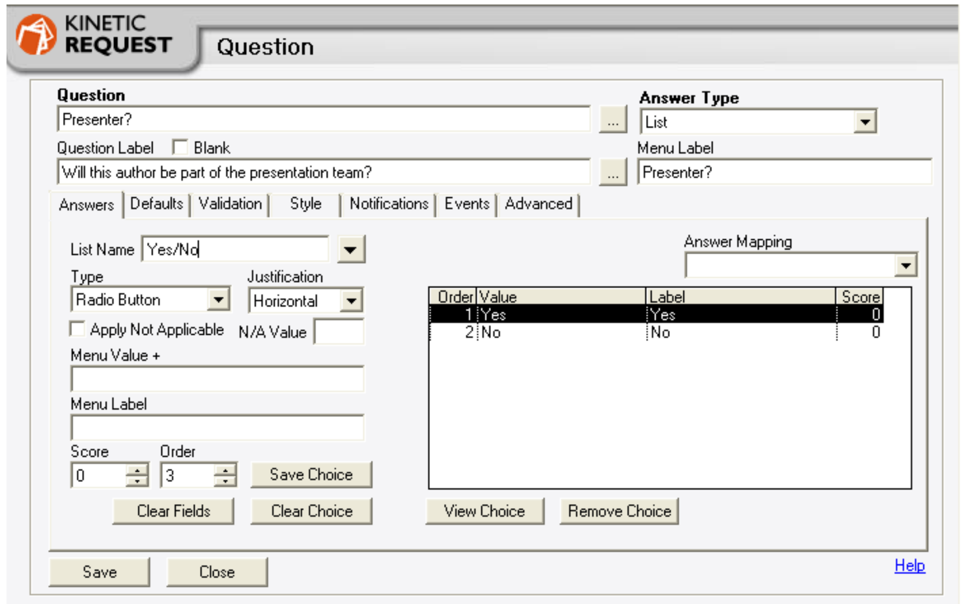


Figure 23: List Answer Type View

3. Type a new name for your list in the **List Name** field, or select an existing **List Name** from the drop-down list box.

4. Select a Type: **Check Box, List box, Radio Button**.

   a. A **Check Box** offers the opportunity for submitters to make MULTIPLE choices from the list

   b. A **List Box** offers choices in the form of a drop-down menu.

   c. A **Radio Button** will only allow users to make a SINGLE choice from the elements in the list.

5. Select an **Answer Mapping** if desired. Answer Mapping will map the answer from this question back into one of the request base fields. See **Answer Mapping** under the section on **Attachment** for details.

6. Select Justification: **Horizontal** or **Vertical** to determine the presentation of the list (applicable to only Check Box and Radio Buttons).

7. If you select the **Apply Not Applicable** check box, the **N/A Value** field auto-populates. You can override this label with another value if needed.

8. Add a value for your list in the **Menu Value +** field. If you do not want to manually set a Score, Order, or Label you can hit return to have this value added to the list.

TIP

To add space between your horizontal radio buttons, add one or more " " (HTML for a space).

9. Add a label for this value if you want the label to be different than the value. The label can contain a value, HTML markup (such as an image link) or a combination.

10. Adjust the score to represent the score for this List item.

11. Adjust the **Order** to select where your **Menu Label** displays, as shown in Figure 24: Menu Label with Order and Score Fields. For example, if you want your new Menu Label to be the fifth choice, enter five (5) in the **Order** field.

Order	Value	Label	Score
1	Minnesota	MN	1
2	Wisconsin	WI	2

Figure 24: Menu Label with Order and Score Fields

12. Click the **Save Choice** button and the **Menu Label** displays in the **Choice** box along with your selected order and score.

13. Click the **Clear Choice** button to clear the **Menu Label** field.

Note: Click the **Clear Fields** button to clear ALL fields on this screen.

14. Click the **View Choice** button if you want to change the **Value, Label** or its **Score** and **Order**.

15. Click the **Remove Choice** button to delete your **Menu Label**.

16. Click the **Save** button if you are done editing the question. If not continue on to the other tab descriptions.

Or

17. Click **Close** button if you do not want to save your data.

Numeric Range

Numeric Range questions will present a series of radio buttons or a menu including all integers within your Minimum to Maximum range. The score for each of these items will also equal the value of the integer selected.

1. Select **Numeric Range** from the drop-down list adjacent the **Answer Type** field.

2. The **Answers** tab repopulates with new fields.

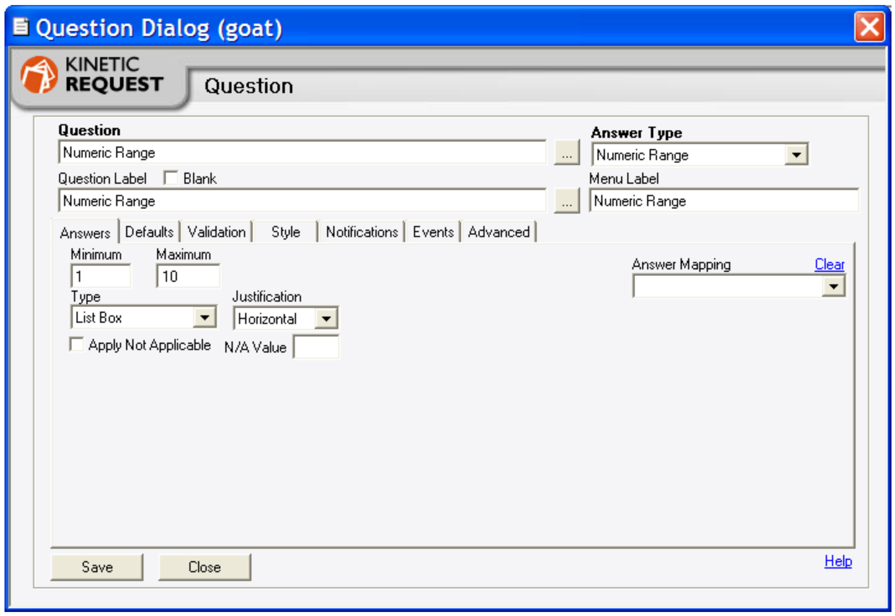


Figure 25: Numeric Range Answer Type

3. Enter numbers in the **Minimum** and **Maximum** fields.

4. Select a Type: **Check Box, List box, Radio Button**.

   a. A **Check Box** offers the opportunity for submitters to make MULTIPLE choices from the list

   b. A **List Box** offers choices in the form of a menu.

   c. A **Radio Button** will only allow users to make a SINGLE choice from the elements in the list.

5. Select Justification: **Horizontal** or **Vertical** to determine the presentation of the list (applicable to only Check Box and Radio Buttons).

6. If you click the **Apply Not Applicable** check box then the **N/A Value** field populates. This value can be overriden if needed.

7. Select an **Answer Mapping** if desired. Answer Mapping will map the answer from this question back into one of the request fields. See **Answer Mapping** under the section on **Attachment above** for details.

8. Click the **Save** button if you are done editing the question. If not continue on to the other tab descriptions.

Or

9. Click **Close** button if you do not want to save your data.

The Defaults Tab

The **Defaults** tab allows you to specify a hard coded default or a dynamic value into the question field.

Enter a Static Default Value

1. Select the **Defaults** tab.

2. In the **Default Answer** field, enter the default value for this question.

Enter Advanced (Dynamic) Default

1. Select the **Use Advance Defaults** check box. The Default Lookup fields will become available

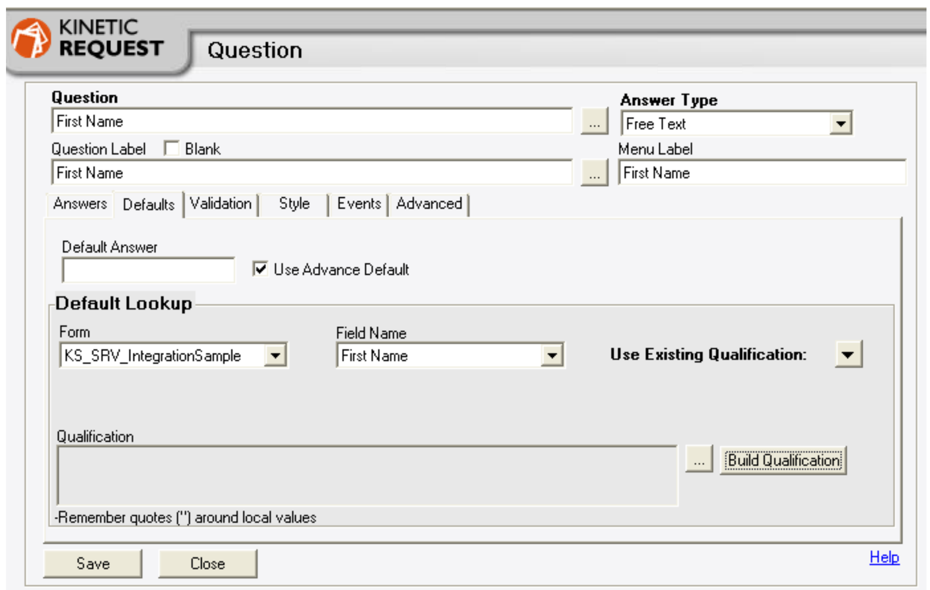


Figure 26: Defaults Tab

2. Use the **Form** and **Field Name** drop-down lists to select from where you would like to retrieve the defaults.

3. Select the **Dynamic Default Base Type**. If you have an answer from a previous page that you want to include in your qualification to look up a value, select "Answers".

4. The **Existing Qualification** drop-down list can be reused as you may need to take several defaults from the same form using the identical qualifying linking between the source and destination forms.

5. The **Build Qualification** button allows you to specify which fields on the current form link the user to the form from which you are retrieving a value. Click the **Build Qualification** button to display the **Advanced Qualification** dialog.

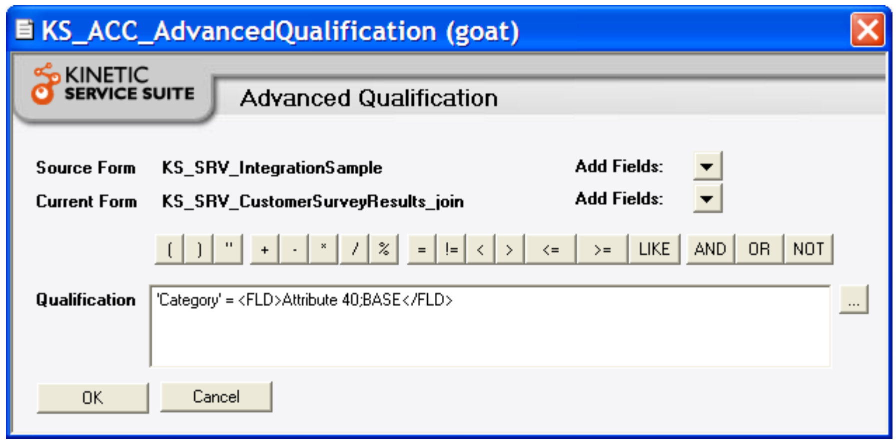


Figure 27: Advanced Qualifications Dialog

6. Make a selection from the **Add Fields** drop-down list box.

7. You can also use the value buttons, for example *LIKE* or *<=* for more finite searching of established qualifications.

8. Click the **OK** button to save your changes.

9. The qualification will be displayed in the Qualification field on the Defaults tab.

THE VALIDATION TAB

The Validation tab allows you to prompt for a required question from the user as well as specifying the message a user sees if a question requires a certain type (integer or decimal) and the user attempts to enter an illegal character.

Under the Validation tab, a couple of the **Answer Types**, typically set by an Administrator, will automatically populate or default to a **Pattern Label**.

1. Click the **Validation** tab.

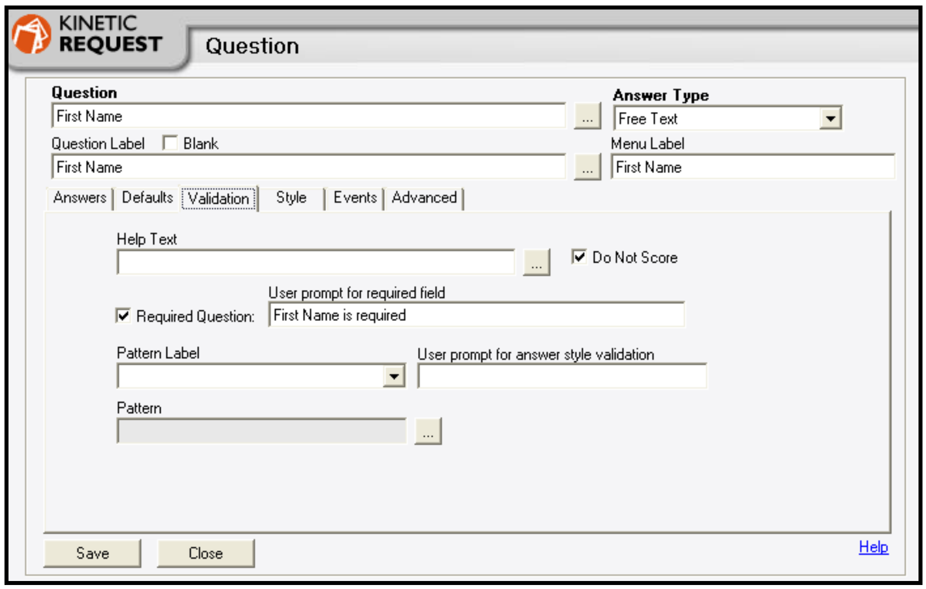


Figure 28: Validation Tab

TIP:

Help Text should be short. Some browsers will only render one line of Help Text.

EXAMPLE:

Pattern Label could be a standard e-mail address, a numeric range, or a URL that must fit the pattern dot.com or dot.org.

2. If you want to add a **Required Question** for the user, click the check box adjacent that selection.

3. Once **Required Question** is clicked, the **User prompt for required field** is enabled and you can enter the text displayed to a user if the question is not filled out when submitting the request.

4. If needed, add **Help Text**.

   Running the mouse over an image in the request will force a "**Help Text**" box to appear. The message might be, "*Click here for more information.*"

5. Choose a **Pattern Label** from the drop-down menu if needed.

Pattern Label will set a specific pattern for some Answer Types requiring a user to enter an answer that matches the pattern. Some answer types will default to a specific pattern (Email, Integer, Decimal). This field can be changed if it automatically populates to a default. Patterns are entered and maintained by an Administrator.

6. Under the **Pattern** field, a regular expression will appear supporting the Pattern Label. You can override what has appeared, or create your own to support a specific Pattern Label choice.

7. Click the **Save** button if you are done creating your question.

The Style Tab

The **Style** tab allows for modification, deletion or creation of multiple style properties for a question. Specific options offered for modifications are:

- **Question Label**: The label appearing above or to the side of a question.
- **Answer Label**: The label(s) appearing next to any checkbox or radio button answers.
- **Answer Value**: The actual box and text that appears to fill-in an answer for "**free text**" questions. Also, answer value applies for "**list**" questions as the button/checkbox itself.
- **All**: Styling at this level will apply to all child elements above within a question.

Note: Child element styling will take precedence over "All" styling.

Create a Style

1. Click the **Style** tab.

2. Click **Add** or **Modify**.

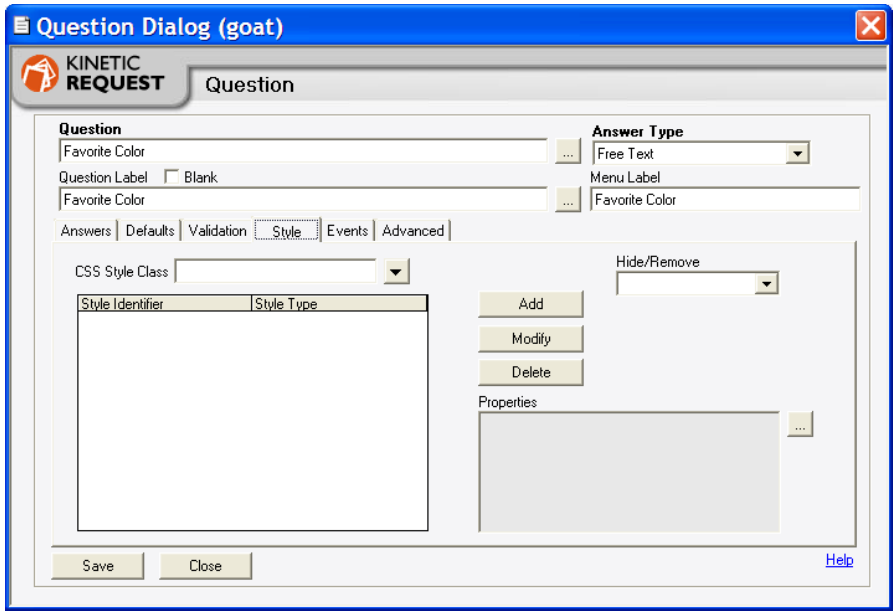


Figure 29: Style tab for Question

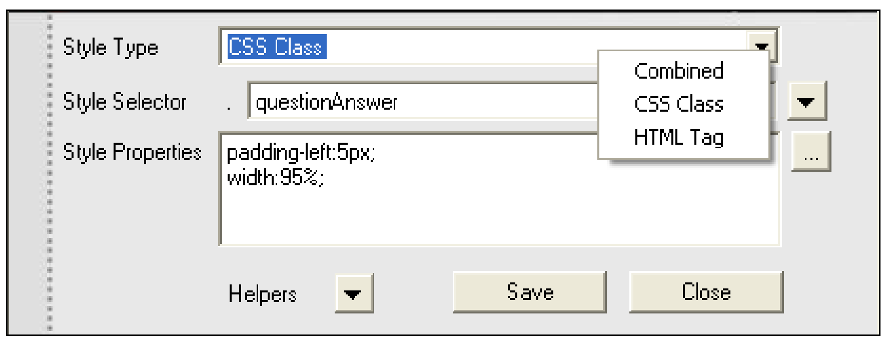


Figure 30: Style Type, Selector, and Properties

3. Choose between three styles:

- **Combined –** Used for combining style selector types or creating multiple class selectors (advanced CSS).
- **CSS Class –** Applies to any element that has a class of a particular name.
  - Choose from the **Style Selector** drop-down menu or create a user-defined custom class.
- **HTML Tag –** Applies to every occurrence of the particular HTML tag.

4. Choose a **Style Selector** such as text, element, question or template from the drop-down menu, or create your own.

5. The format for **Style Properties** is typed as shown in the screen above (i.e., property, colon, and property size with each line ending with a semi-colon).
   - Click on the **Helpers** drop-down for all available HTML helper properties.

Note: Not all **Helper** HTML properties will work for every browser.

6. Click **Save** and **Close**.

THE NOTIFICATIONS TAB

The **Notifications** tab allows you to send one or more notifications. Typically, this is used to notify a manager of a particular request submission, such as someone needing a new PC, or access to a report.

Notifications can be either Standard or Dynamic. Standard notifications will include a static email address for the notification. Dynamic Notifications will derive the "To" address from a value within the request itself.

Create a New Notification

1. Click the **Notifications** tab.

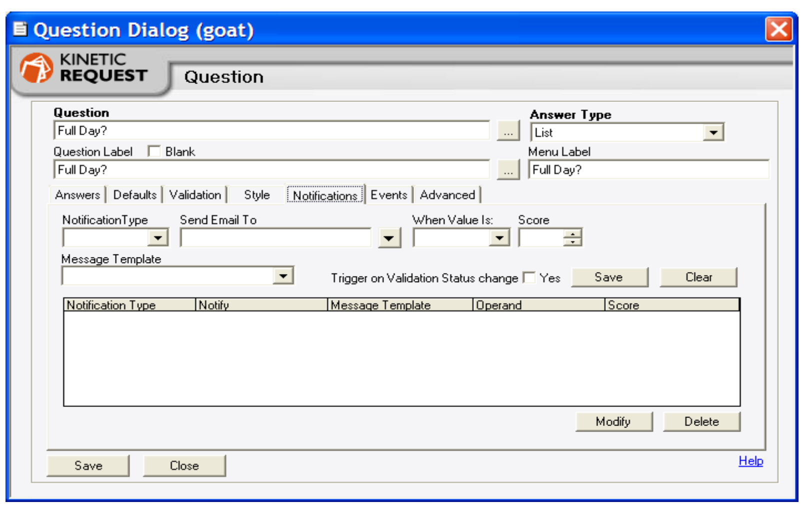


Figure 31: Notifications Question tab

2. Select the desired **Notification Type** (Standard or Dynamic).

3. Enter a value for **Send Email To**:

    - For **Standard** Notifications: Enter a static email address into the **Send Email To** field.

    - For **Dynamic** Notifications: Select the request field or question from the menu that will hold the "To" email address.

4. Enter the operator in the **When Value Is** field (Equal To, Greater Than, Less Than).

5. Enter the **Score** corresponding to the operator.

6. Select a **Message Template**. A message template is the format of the message to send to the user.

7. Click **Trigger on Validation Status change** if this notification should be evaluated on a Validation Status change. Typically, notifications are only evaluated when a request is submitted. By clicking this button, the notification will also be evaluated when the "Validation Status" changes on a request. Validation Status is often used for approvals on forms.

8. Click **Save** to save the Notification. The notification will appear in the table.

Modify Existing Notification

1. Select a notification in the Notifications table.

2. Click **Modify**. The notification information will appear in the corresponding fields on the table.

3. Modify any necessary fields.

4. Click **Save** to save the Notification. You may also click **Clear** to exit out of modifying the notification.

THE EVENTS TAB

Generically, Events are set to occur as a customer is filling out a request, as a "cause and effect" trigger. Events happen on the screen, in real time, and trigger certain Actions. They apply to all the elements of a Service Item (i.e., Question, Page, Section, Text, and Image).

Events are typically most useful for questions using a list or menu where a "known" set of answers is available to the user. This would include question types like Numeric Range or List. However, events can be used on all elements and answer types.

All of the available Events are listed here, not just the events specific to questions. See table 3 for a list of events by element.

- attachMenu – after a menu is attached to a question this event is triggered. Often used in conjunction with the populate menu action.
- beforeSubmit – takes place after the submit button is clicked, but before any data is submitted to the database. Useful for complex data validation. With custom javascript, you can stop the submission process.
- Blur – To leave or "lose focus" in a field.
- Change – To enter data or information in a field, and then change that information.
- Click – To click on an element, and cause an action to take place.
- *Custom* - created by customer
- Focus – The opposite of "blur." To click in a field, is to "focus."
- Load – When a web page is displayed.
- Keyup – the action of a key coming up. Normally used with the Fire Event If – 'Return was Pressed' parameter.
- Mouse out – To move the cursor outside an element.
- Mouse over - To move the cursor over an element.
- setFieldsReturn – happens after a Set Fields action when the 'Return was Pressed' Fire Event If parameter is used.
- Submit – When data from the web page is submitted to the database. This happens after the Before Submit event.

Note: Both a click event and a change event can happen, simultaneously.

Table 3:Events Applicable to Elements

Element	Applicable Event(s)
Question	Custom, attachMenu, Blur, Change, Click, Focus, keyup, Mouse Out, and setFieldsReturn
Pages	BeforeSubmit, Load, setFieldsReturn, and Submit
Section	Mouse Out and Mouse Over
Text	Custom and Click
Image	Click

TIP

Use Sections when you want to hide or show multiple request elements.

Image, text, and question have a built in Help Text feature that resembles the 'Mouse Over' event.

Actions are triggered when a customer fills out a survey that has an Event (or Events) built into the form. The following table has descriptions of the available actions. All actions are available for each event.

Table 4: Action Descriptions

Action	Description
Custom	Allows users to write their own JavaScript to be triggered on an event.
Hide and Show In Place	Allows users to selectively choose which fields are visible and which are hidden, depending on a selected answer value. Hide will leave the "white space" for an element.
Insert and Remove	Allows users to insert an element, or remove an element depending on an event. Other elements on the page will shift to either make room for an insert or coverr up a remove.
Populate Menu	Where a new menu is created based on an event. A new menu can only be added to a "list" answer type (including Dynamic List).
Read Only and Read/Write	Allows users the option to have a field inaccessible, but still visible, or the option to both read and write in a field.
Required and Optional	Allows users to make something conditionally

	required based on an event. Example: When a field cannot be avoided in order to continue, or where additional fields may appear in order to continue.
Set Fields - External	Allows an event to "Set" the value of questions on the page from an external data source (Remedy form) as a submitter fills out a form/request.
Set Fields - Internal	Move and/or combine

Each action has a different set of required parameters. The following is an example of a Hide/Show action. The Required/Optional, Read Only/Read-Write, and the Insert/Remove are similar to Hide/Show.

1. Click the Events tab.

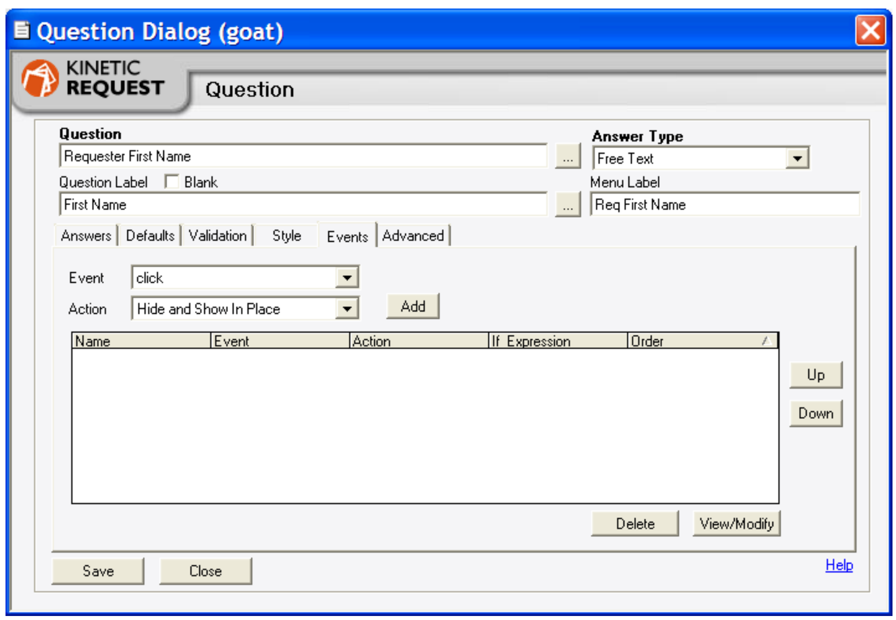


Figure 32: Events Tab

2. Under the **Question** field, type a question.

3. From the drop-down menu, select an **Answer Type**. Refer to Table 3, above.

4. Enter or type in a **Question Label**, or click in the Blank box.

5. From the **Event** drop-down menu, select an event.

6. From the **Action** drop-down menu, select an action to occur from the chosen event.

7. Click ‘Add’.

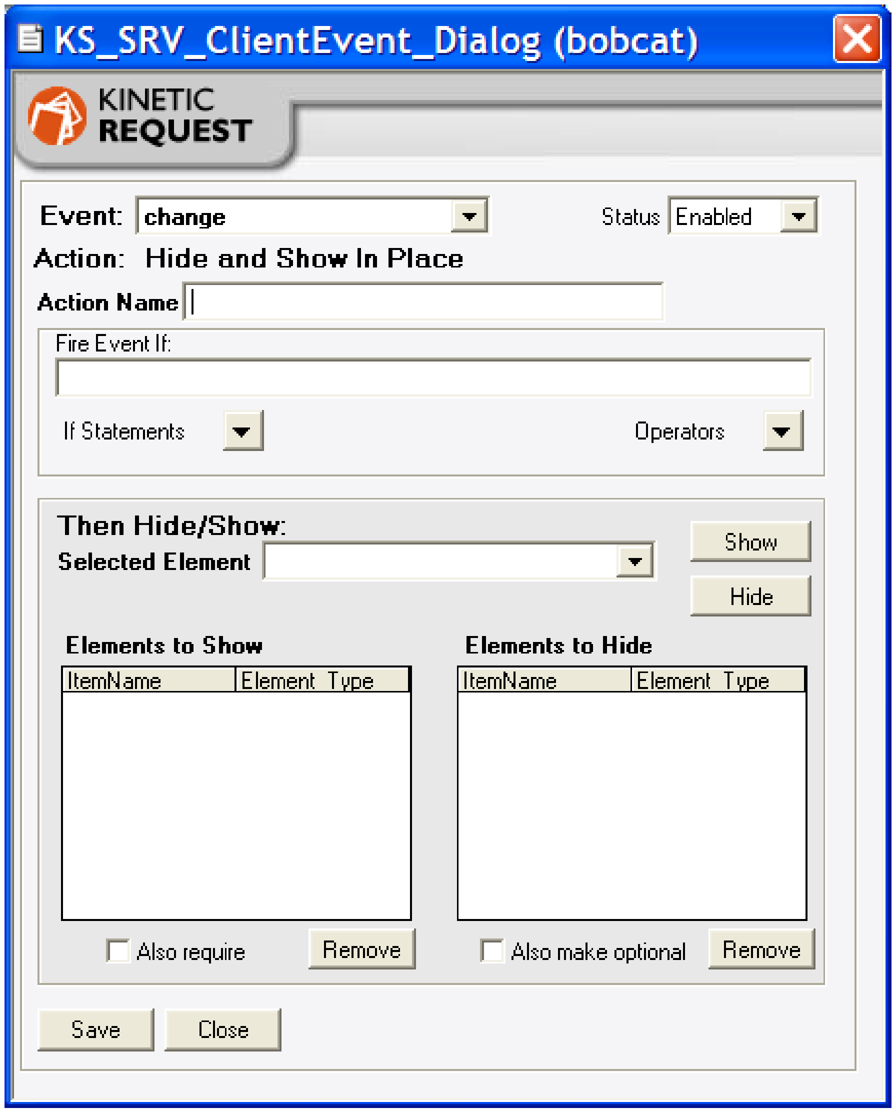


Figure 33: Hide/Show

8. Enter a name in the **Action Name** field.

9. Enter a **Fire Event If** qualification if needed. If no value is entered it will resolve to true and not restrict the event. A variety of basic javascript operators are available from the **Operators** drop-

down. **If Statement** options are covered after the individual dialogs.

10. Choose a Survey Element from the **Selected Item** drop-down menu, and click on Show or Hide.

11. To remove a chosen element, highlight the element and click on Remove.

12. If you want all the elements to also be Required or Option on either Show or Hide, select the **Also require** or **Also make optional** check boxes below their respective sections.

13. If you need to change the **event** that was initially selected, use the **Event** drop-down list.

14. If you want to disable the event, use the **Status** drop-down in the upper right corner of the dialog.

15. When finished, click Save and Close.

The javascript for the event is created and placed on your service items web page the next time it is saved.

Other Event Actions

Set Fields – Internal and Set Fields – External have very similar dialogs for creating their actions.

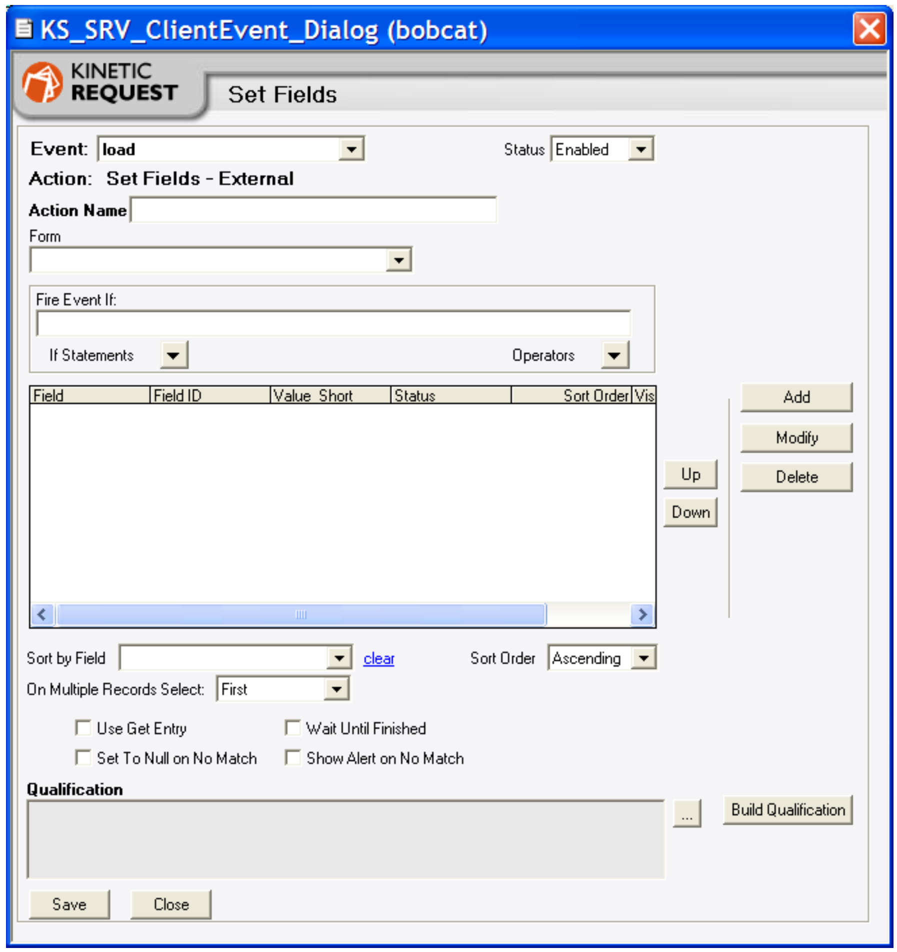


Figure 33: Set Fields – External dialog

To complete this dialog after selection the Event and Action:

1. Enter an **Action Name** that describes the action you are constructing and makes it easy to remember.

2. Select the form you are getting the data from, from the drop-down list in the **Form** field.

3. If needed select a **Fire Event If** statement from the drop-downs. There is a selection of basic javascript operators available from the

Operators drop-down list. **If Statement** options are covered after the individual dialogs.

4. Map the fields from your selected form to the fields on your template by clicking on the **Add** button.

   a. The left or **Destination** side lets you select the question on the service item that will receive the value.

      Check the **Fire Change Event** box if you have a change event on this field you want to fire when a value is placed in this field.

   b. The right or **Source** side lets you select from the answers or base values and then click the Add button.

   or

   c. Type a static value into the **Value** field.

   or

   d. You can combine multiple static and field values into the **Value** field.

   e. If you are going to be presenting the customer with a table of options to choose from, you can use the **Visible in Table** and use the **Label** field to customize the label.

   f. Use the Up/Down buttons to order the way the firlds are displayed on the table presented to the customer.

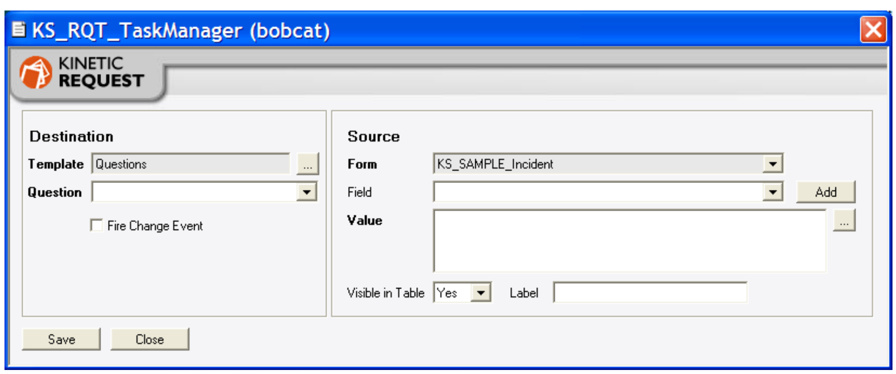


Figure 35: Mapping Dialog

5. Build the qualification that defines the data that is returned by clicking on the 'Build Qualification' button and completing the Advanced Qualification dialog.

6. If you are only expecting one record returned (search by unique ID), leave the drop-down list **On Multiple Recods Select:** at **First**. If you may have more than one (search by Last Name), set the field to **Show List**.

   - If needed, the list will display with all the fields you have set in your mapping displayed to help the customer select the correct data. If only one record is returned by the search it will populate the mapped fields.
   - If you are returning multiple records, there are options for sorting, and a **Max Entries** field available. **Max Entries** is required, but defaults to 12.
   - If you want the Get Entry filter workflow to fire, check the **UseGetEntry** check box.
   - If you want the mapped questions set to NULL if no result is returned, check the **Set To Null on No Match** check box.
   - If you want a javascript alert to display if there is no match, check the box next to **Show Alert on No Match.**

7. If you need to change the Event that triggers the action, select a new event from the **Event** drop-down list.

8. If you need to disable the event, you change change the status in the **Status** drop-down list in the top right of the dialog.

Set Fields – Internal is the same as External, except you are just moving data on the template, so there is no **Form** or **Qualification** field, and no sorting. Simply set your mappings and the **Fire Event If** statement.

Populate Menu is the last remaining action and is used to change the menu on a list question based on an action and qualification.

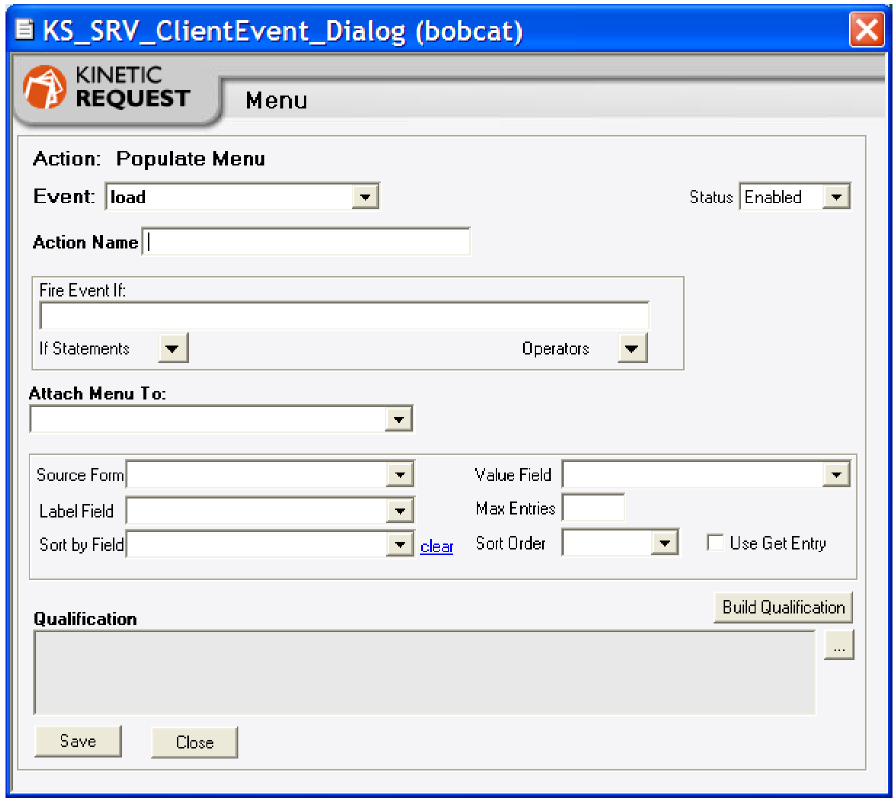


Figure 36: Populate Menu Dialog

To complete the dialog after selecting the Event and Action:

1. Enter a name in the **Action Name** field

2. Enter a **Fire Event If** statement if needed. A selection of javascript operators is available from the drop-down list **Operators**. **If Statements** is addressed at the end of the Events section.

3. Select the list question to receive the new menu from the drop-down field **Attach Menu To**. The new list must go onto an already established list question.

4. Similar to creating a Dynamic List, choose a **Source Form, Label and Value** fields. And similar to a Set Fileds – External action, you can select sort order info and max entries.

5. If you want the Get Entry filter workflow to fire on a lookup against the Remedy form, check the **Use Get Entry** check box.

6. If you need to change the event that fires the action, select a new event from the **Event** drop-down list along the top of the dialog.

7. If you need to disable the event, you can set the status of the event in the **Status** drop-down list.

Click on the 'Build Qualification' button to set the qualification in the Advanced Qualification dialog.

For the **Fire Event If** field on all actions, there are a vaiety of pre-configured option that will place the correct javascript into the field for you. The following table lists all the options and gives a brief description.

Table 5: Event Actions

If Statement	Description
Page is New	Resolves to True if the page has not been previously submitted.
Page is NOT New	Resolves to True when you return to a previously submitted page.
This is a Review Request	Resolves to True when the page type is Review Request (see Page elements)
This is NOT a Review Request	Resolves to True when the page type is not Review Request
This is an Approval	Resolves to True when the request is in approval mode
This is NOT an Approval	Resolves to True when the request is not an approval
User is Authenticated	Resolves to True if a user was authenticated before the request is loaded
User is NOT Authenticated	Resolves to True if the user is not authenticated when the request is loaded
Checkbox is Checked	Resolves to True if the question is answer type List and type Check box and the customer clicks one of the possible check box answers. If you want to check for a specific value checked you need to a "This Value Equals" parameter. To recognize "unchecking", manually change the inserted text from obj.checked==true to obj.checked**!=**true
Page is NOT Loading	Resolves to True when the DOM is done loading for the request
RETURN was pressed	Used in combination with keyup event, this will resolve to True when the ENTER key is

	pressed.
This Value Equals	How you check to see if the answer on the question the event fires on is equal to a certain value. If the question is answer type list, the selection of possible values is automatically added as a drop-down list under the Fire Event If field.
This Value NOT Equal to	How you check to see if the answer on the question the event fires on is NOT equal to a certain value. If the question is answer type list, the selection of possible values is automatically added as a drop-down list under the Fire Event If field.

THE ADVANCED TAB

The **Advanced** tab displays corollary information regarding your question, for example, the ID of the question or request instance. Typically, these values do not need to be changed.

1. Click the **Advanced** tab.

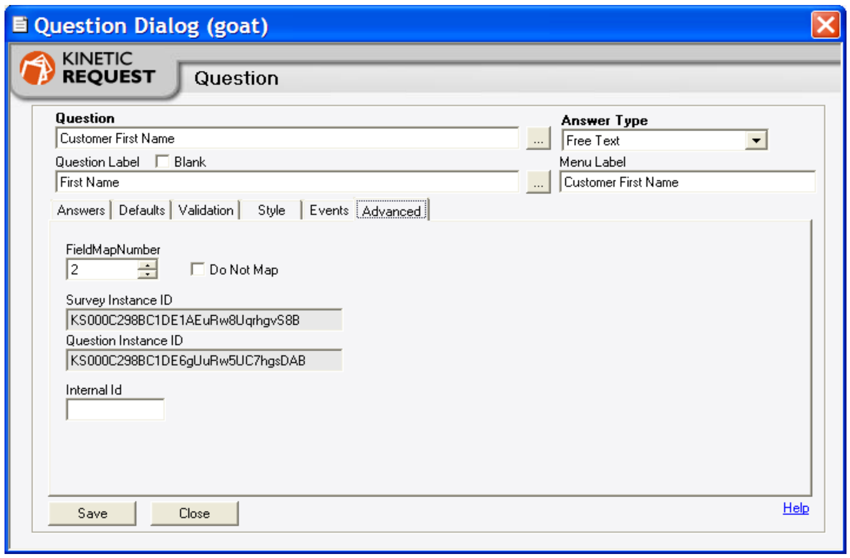


Figure 37: Advanced Tab

2. The Field Map Number displays in the **FieldMapNumber** field, which you can alter by using the adjacent up or down arrow keys.

   The FieldMapNumber is used to map the answer to the question into a field on the KS_SRV_SurveyResult form. For instance, when the FieldMapNumber=1, a customer's request answer will get mapped to the "Answer Viewer 1" field on the KS_SRV_SurveyResult form when a request is submitted.

   If you do not want your answer mapped, click the **Do Not Map** check box. Answers are still kept in the KS_SRV_SurveyAnswer form, but are not pushed to request report forms.

   The **Request Instance ID** and **Question Instance ID** fields are for reference only and cannot be altered. These may be used for creating qualifications in advanced reports or other advanced functionality.

3. Click the **Save** button if you've made any changes, otherwise simply click the **Close** button.

ADD PAGE

A service item automatically includes a first page (Initial Page) when created. As you create your service item, all elements are added to a page. You can add additional pages for splitting up the content of your request, allowing customers to review information, or to create a confirmation page after submitting a request.

1. Click **Add Page** from the Element selector dialog. Branching, Style, and Events are covered seperately.

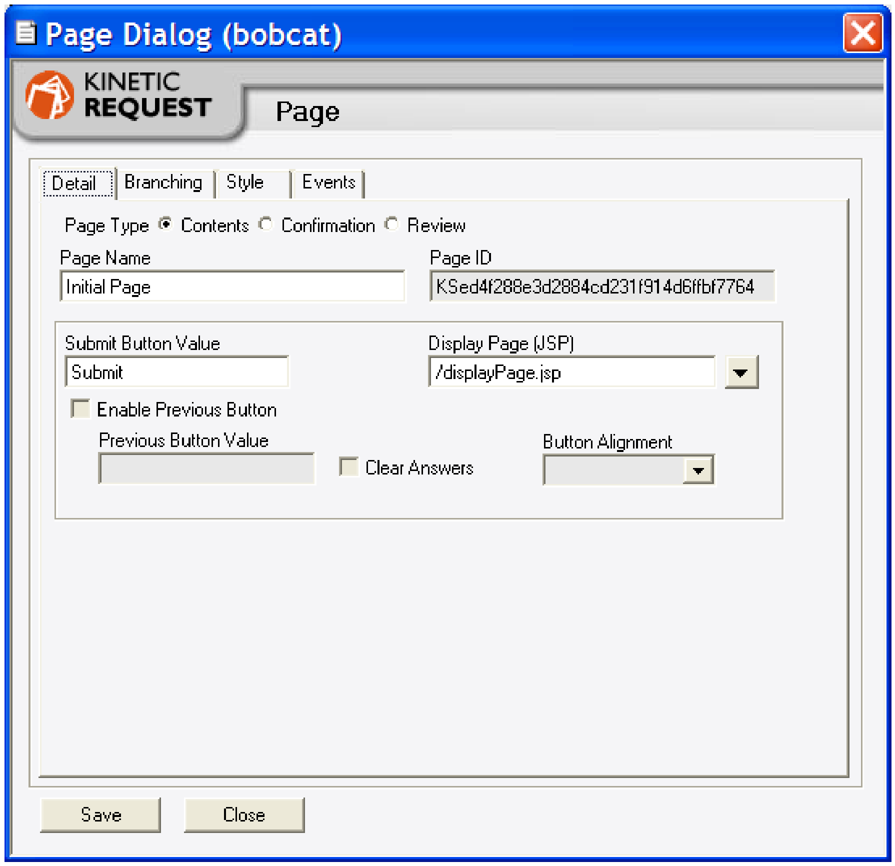


Figure 38: Add Page dialog

2. Select a **Page Type**, either **Contents, Confirmation, or Review.** Details of each type of page are below.

3. Enter a **Page Name** in that field. If this is a newly created service item the default is "Initial Page".

4. Enter a button value in the **Submit Button Value** field if you selected the Contents radio button. If you selected the Confirmation radio button, then the Submit Button Value field is greyed out. If you select Review as the **Page Type** then the **Submit Button Value** field is set to the default value from the Configuration item, and the **Enable Previous Button** is selected and the **Previous Button Value** is set to 'Modify'. If desired, check the box for **Enable Previous Button** and enter a name for the button.

5. If you have a separate display page jsp that you want to use for individual pages, enter that value in **Display Page(JSP)** – or pick one from the drop-down list. The list of jsp files is the same as on the **Advanced** tab of the service item.

6. If you want to enable a Back or Previous button, check the box next to **Enable Previous Button**. You need to enter a value in the **Previous Button Value** field, and select an alignment from the **Button Alignment field**.

7. If you want all answers on a page to be Deleted when you use the Back button functionality, check **Clear Answers**.

8. Click the **Save** button.

PAGE BRANCHING

Page branching allows you to skip ahead to pages farther into your service item, based upon data entered by the requestor. Requestors are only allowed to move ahead in the request with page branching, to go back to previous pages, see the steps for 'Previous Button' above.

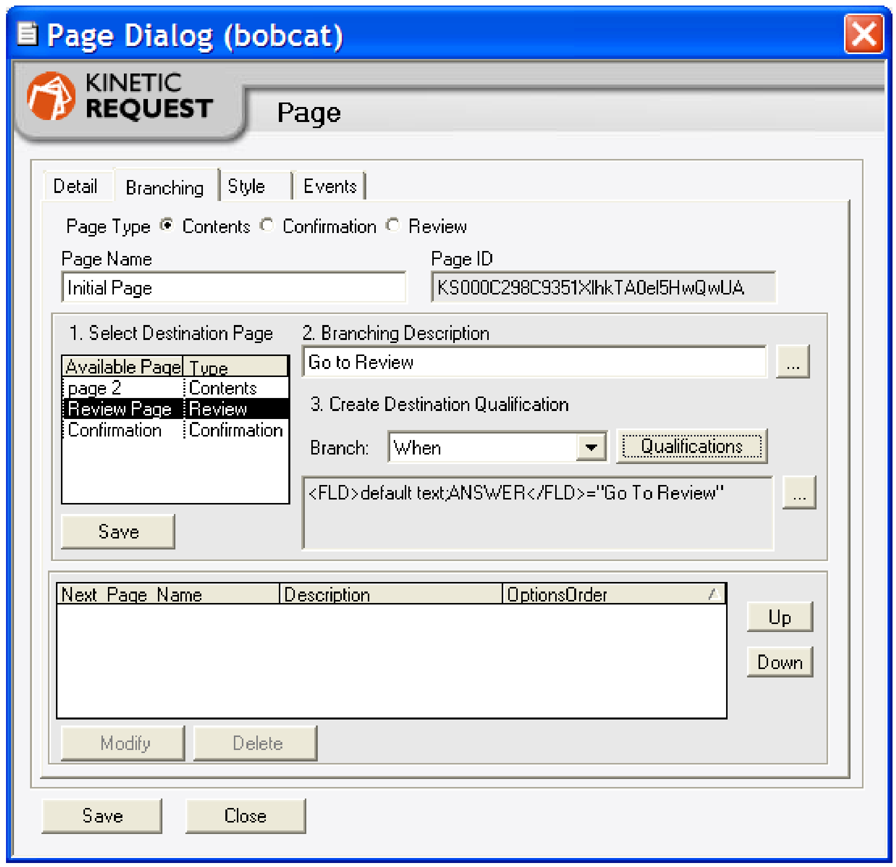


Figure 39: Add Page - Branching Tab

1. After clicking the Branching tab, select a destination page from the table.

2. Enter a descriptive name for this branching

3. Click the **Branch** drop-down

    - Select "Always" if you want the branching to happen every time.

    - Select "When" if you want to setup your qualification using the Advanced Qualification dialog.

4. Click **Save.**

You can have several branching qualifications on the same page. Enter them individually, and then order them with the **Up** and **Down** buttons.

To modify an already created page branching, click on the desired row of the lower table, make changes to the qualification that is displayed above, and click the **Modify** button and **Save** again when done.

TIP:

Any style applied at the Page level will only affect that page.

Page Style

There are three elements available to style for a Page element; page, submit button, and previous button. Click on the **Add** button, select the element desired and add formatting. If you check the **Enable Previous Button** there is an option on the detail tab **Button Alignment** to set the alignment (horizontal or vertical).

Page Events

Client events are added to the specific page on this tab and are available for the following events; beforeSubmit, load, setFieldsReturn, and submit. All actions are allowed for these events. See the Client Events section in the Add Questions section for more details.

REVIEW REQUEST

Review Request is a method of accessing a previously submitted Requests via the web in a display only mode. Review Request is available to all Requests and only requires different and additional parameters to be used in the URL in order to be accessed.

Any pages that do not have any questions answered will not be display in the review request.

Review Request Page Type

If you add a page to a service item and change the type to Review Request the application adds two things, the event that calls the Review Request, and the Text element that holds it in an iFrame.

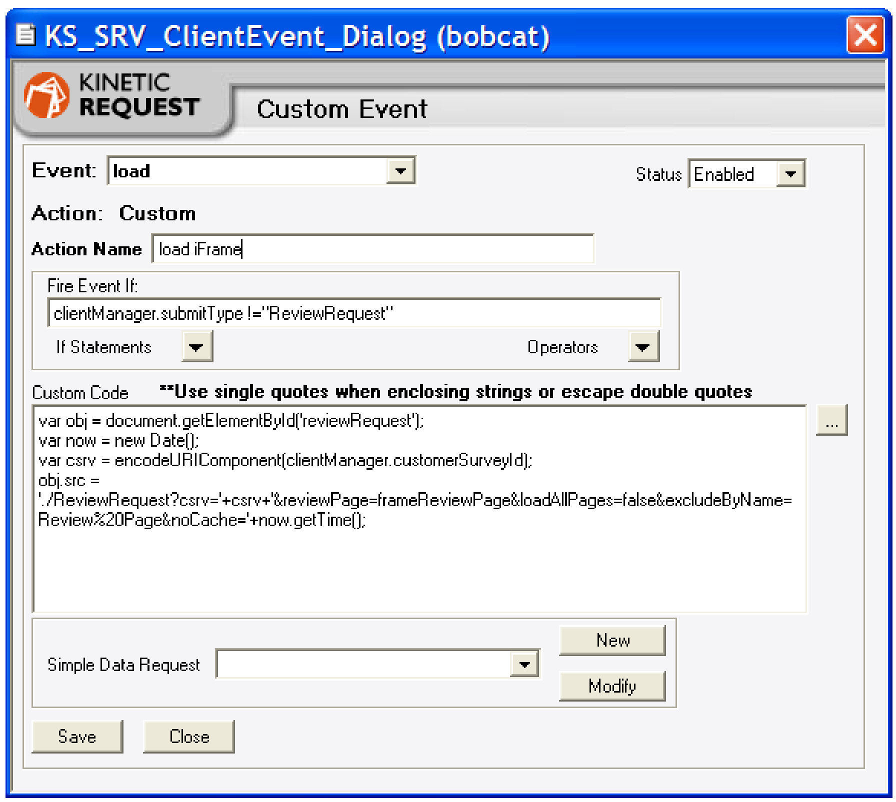


Figure 40: Custom Review Request Event

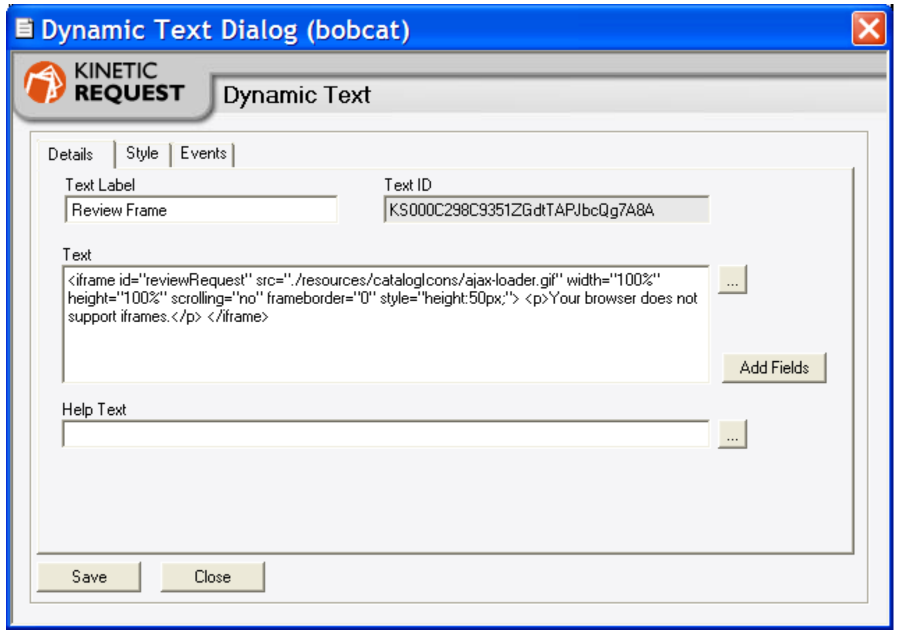


Figure 41: Review Request Text Element

Creating your own Review Request URL

The Review Request functionality is also available through a URL, just like calling an Anonymous service item. The sections below detail how to create the URL and what parameters are available.

Required Parameters:

csrv - The instanceId of the KS_SRV_CustomerSurvey_base record to display.

Example:

- http://MyCompany/kinetic/ReviewRequest?csrv=AG000C298C9351fdhJTAx0-sSAhhYA

Optional Parameters:

These parameters are appended to the URL with an "&".

exclude - comma-separated list of page numbers to exclude from the review (index starts at 1).

Examples:

- http://MyCompany/kinetic/ReviewRequest?csrv=AG000C298C9351fdhJTAx0-sSAhhYA&exclude=2,

- http://MyCompany/kinetic/ReviewRequest?csrv=AG000C298C9351fdhJTAx0-sSAhhYA&exclude=2,3

excludeByName - comma-separated list of page names to exclude from the review.

Examples:

- http://MyCompany/kinetic/ReviewRequest?csrv=AG000C298C9351fdhJTAx0-sSAhhYA&excludeByName=Page 2
- http://MyCompany/kinetic/ReviewRequest?csrv=AG000C298C9351fdhJTAx0-sSAhhYA&excludeByName=Page 2, Page 4

loadAllPages - if "true" all pages in the request are loaded at once. If "false" the contents of the first page will be displayed, and the other content pages will be displayed as tabs. If no value for this parameter is supplied, the value defaults to "true".

Examples:

- http://MyCompany/kinetic/ReviewRequest?csrv=AG000C298C9351fdhJTAx0-sSAhhYA&loadAllPages=true
- http://MyCompany/kinetic/ReviewRequest?csrv=AG000C298C9351fdhJTAx0-sSAhhYA&&loadAllPages=false
- http://MyCompany/kinetic/ReviewRequest?csrv=AG000C298C9351fdhJTAx0-sSAhhYA&loadAllPages=true&exclude=2,3

reviewPage – the name of the jsp page that is used to render the submitted request. The ".jsp" extension should be omitted from the value. If no value for this parameter is supplied, the value defaults to the "reviewRequest.jsp" located in the web application root directory.

Example:

- To open the review request using a the jsp page located at <webapp>/themes/company/reviewPage.jsp, the following URL could be used:

  http://MyCompany/kinetic/ReviewRequest?csrv=AG000C298C9351fdhJTAx0-sSAhhYA&reviewPage=themes/company/reviewPage

ADD SECTION

A section is a grouping of elements within a request. A section can be used to style a group of elements without having to select each element. If you want a whole block of questions to hide/show depending on a selected answer, you could create a section and hide/show this rather than display each question individually.

1. Select **Add Section** from the Element selector dialog.

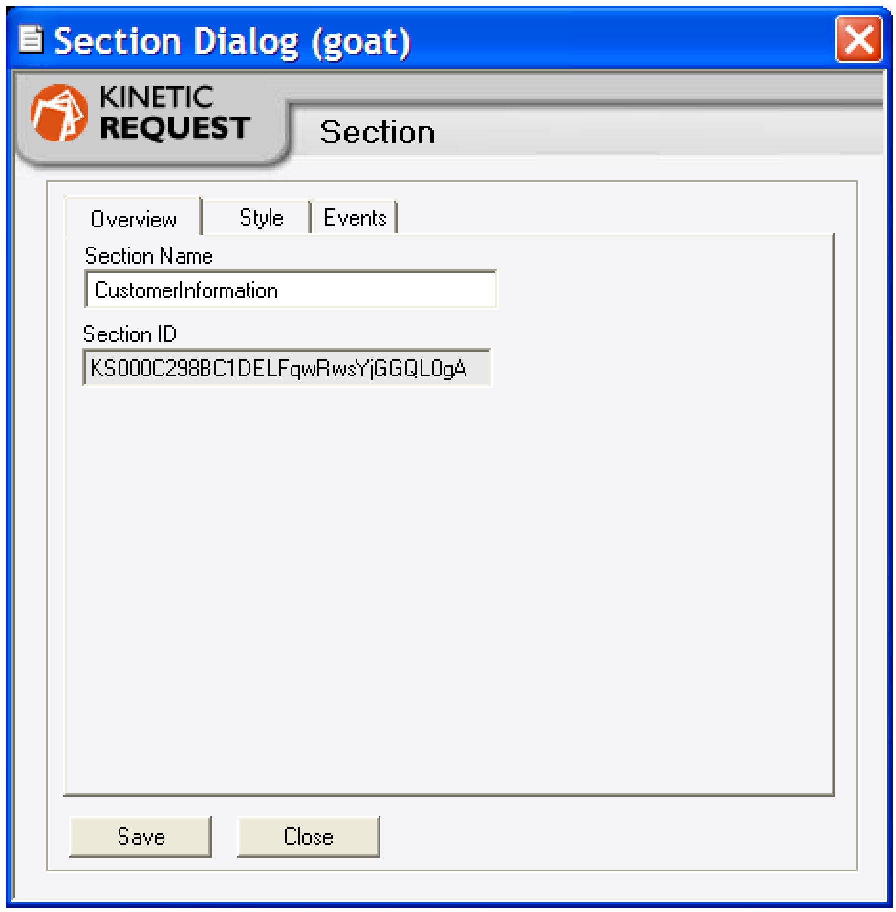


Figure 42: Add Section Dialog

2. Enter a name for your new section in the **Section Name** field.

Note: The **Section ID** field is used for advanced customizations and is not editable.

TIP

3. If needed, select the Style tab and enter any style information that should be applied to the entire section. Styling can also be done via Page Editing. See The Style Tab for more information on styles.

4. Events can also be added from the events tab. See the section on client events in the Add Question section.

5. Click the **Save** and **Close** button.

ADD TEXT

Service items can have any number of text elements. These text elements can be static text, or dynamic text with values that are looked up at request display time.

1. Select **Add Text** from the Element selector dialog.

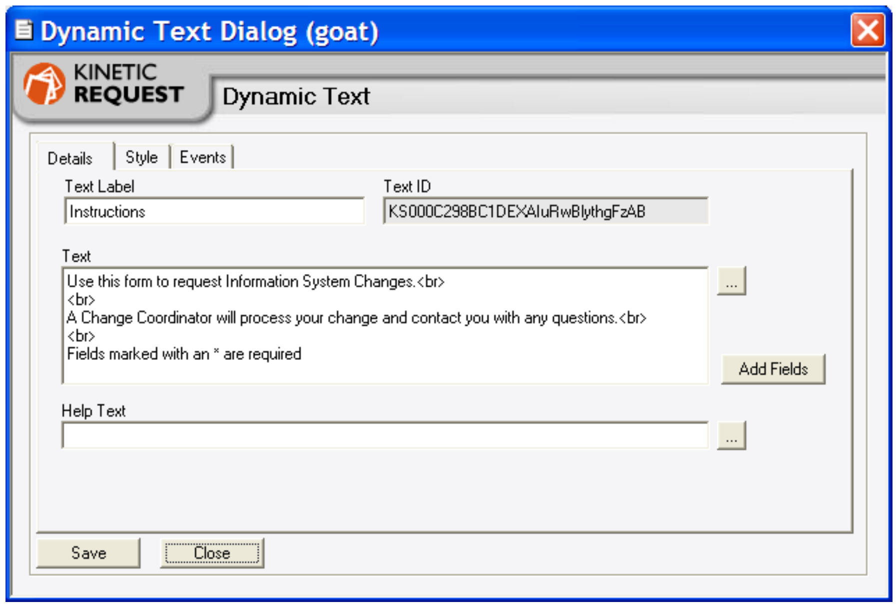


Figure 43: Add Dynamic Text Dialog

2. Enter a label for the text in the **Text Label** field. For example, "Introduction" or "Title". The Text Label must be uniqu for the service item.

3. Enter your text in the **Text** field. You can use HTML when you enter your text to style the words or create hyperlinks

Note: The **Text ID** field is used for advanced customizations and is not editable.

TIP:

Help Text should be short. Some browsers will only render one line of Help Text.

4. If needed, add **Help Text**.

   Running the mouse over an image or text will force a "**Help Text**" box to appear. The message might be, "*Click here for more information.*"

5. If you want to create dynamic text, click the **Add Fields** button to enter a new field in your request.

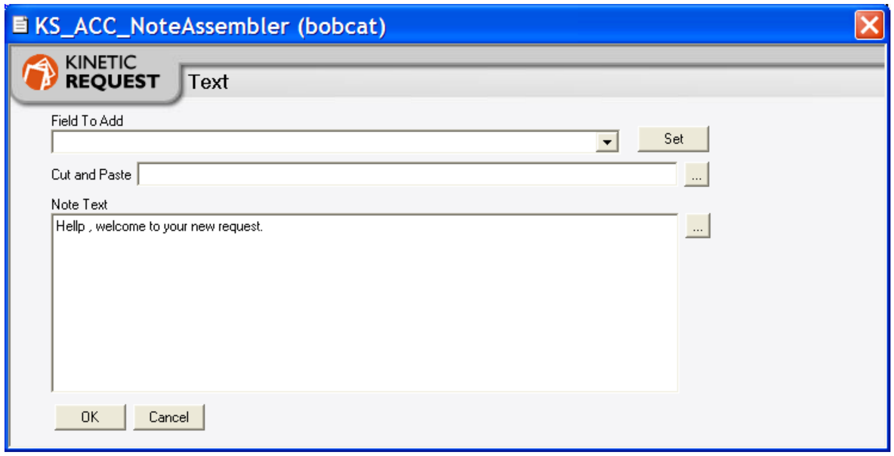


Figure 44: Add Fields Dialog

6. Select either the **Base** or the **Question** drop-down from the **Field To Add field**. Base lets you chose from the attributes of the service item, and questions lets you chose from already submitted answers. If you are on the first page of a service item, only Base is available as an option.

7. Click the **Set** button, and the value is transferred to the **Cut andPaste** field.

8. Use standard cut and paste commands to place the value into your text where it is desired. Additional selections with the **Field To Add** and the **Set** button will overwrite any values in the **Cut and Paste** field.

9. Click OK to exit or Cancel to exit without saving.

10. If needed, select the **Style Tab** and enter any style information that should be applied to this text. See the style tab for more information on styles. Styling can also be done via page editing. To quickly hide or remove the element, select either "Hidden" or "Removed" from the **Hide/Remove** drop-down.

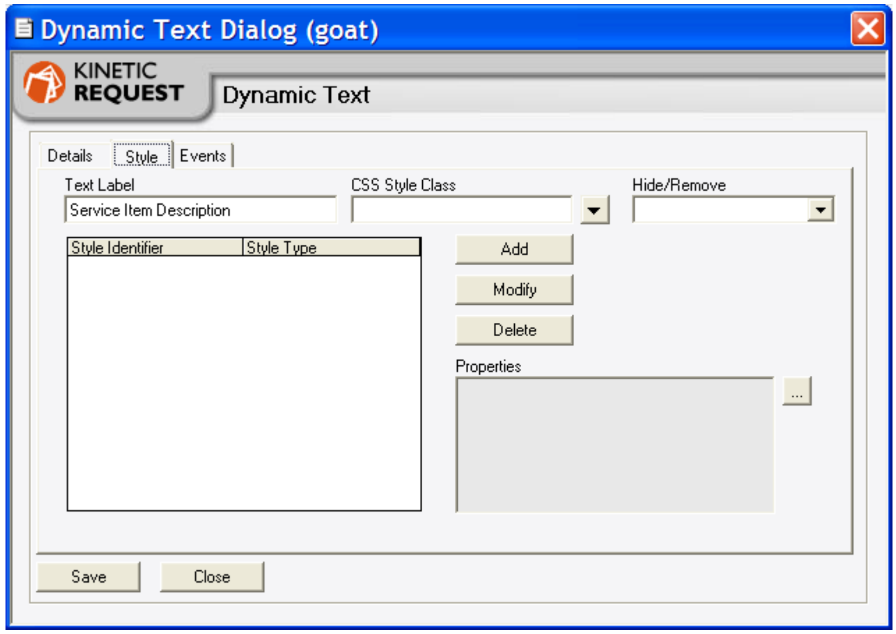


Figure 45: Text Element – Style Tab

11. If needed, select the **Events Tab** and enter any event information that should be applied to this text. See the events section under Add Question for more information on events.

12. Click the **OK** button. Your qualification will be saved back to the Text element dialog.

13. Click **Save** to save your new Text element

Add Image

Images are a great tool for enhancing service items. They must be in a web-suitable format such as JPG, GIF or PNG. Upload new images or use existing images from the Kinetic Request Attachment Library. Before adding or modifying an image, ask yourself if the image could be applied to one template, a few templates, or all templates? This step facilitates future decisions to easily change an image on an individual request or on all requests, at the same time.

Attach a New File

1. Click **Add Image** from the Element selector dialog. The **Add Image** dialog displays.

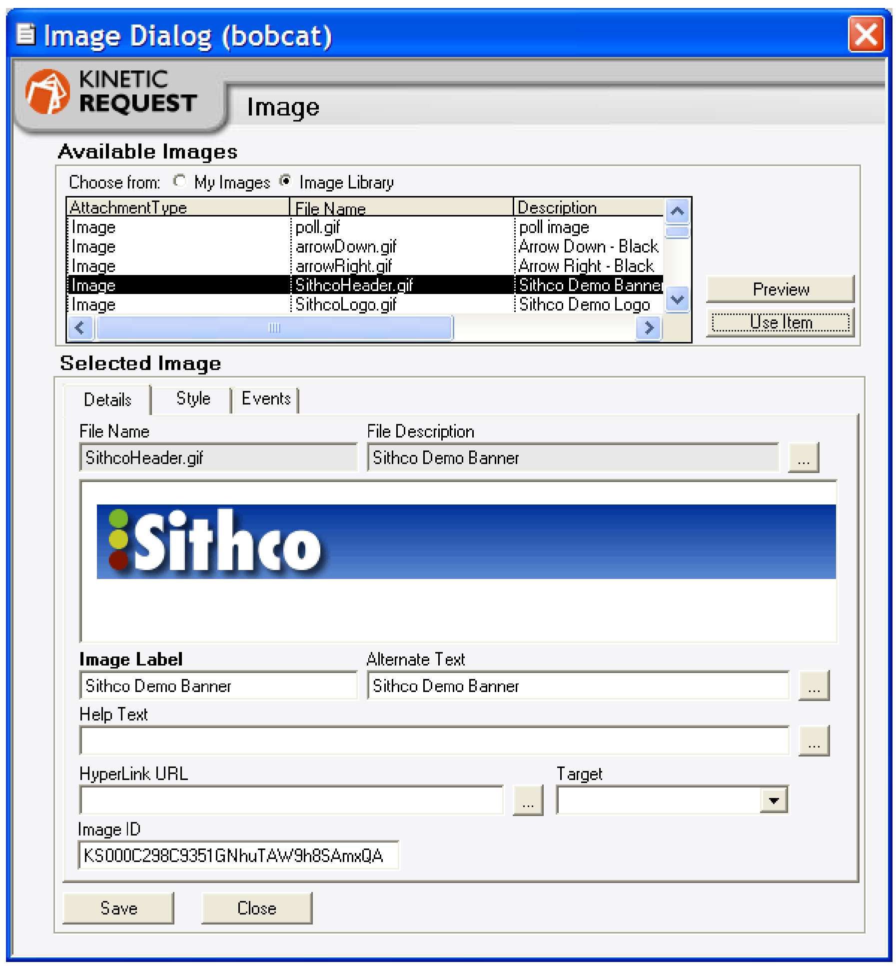


Figure 46: Add Image Dialog

NOTE:

My Images are those file images attached to the current request. **Image Library** holds a list of file images shared by all templates.

TIP:

Click **Preview** to view an image of a highlighted file.

2. Click the **New File** button to attach a new image to this request. The New Attachment dialog opens.You can also use the **Attachment Library** to select an image used in another request rather than uploading a new one. This is accomplished by clicking the Attachment Library radio button.

> **Note:** If an image is used multiple times within a template, it only needs to be attached once.

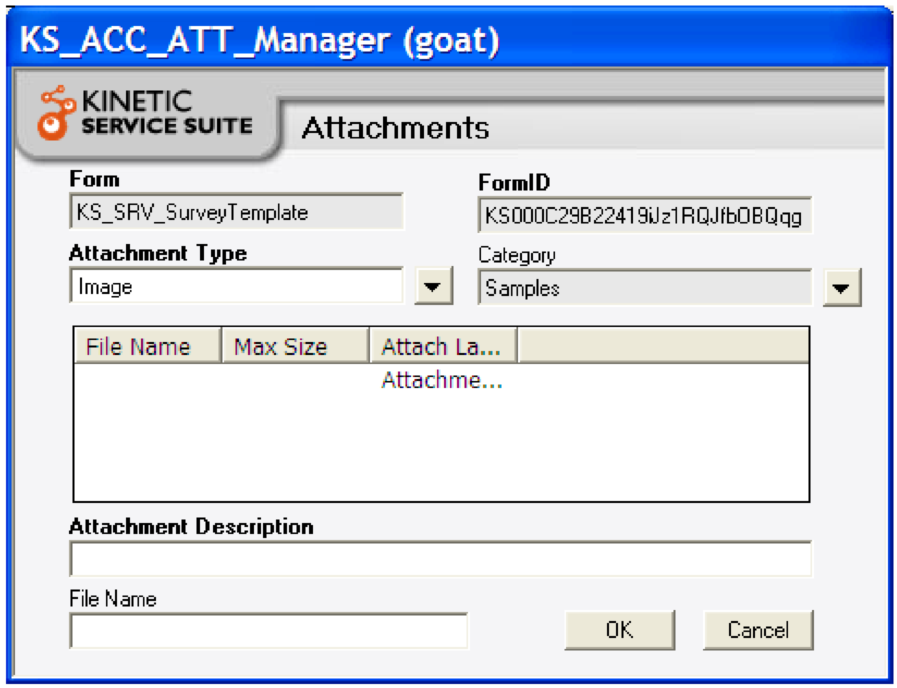


Figure 47: Attachments Dialog while Adding a File

3. Right-click underneath the **File Name** column heading.

4. Select **Add**.

5. Click on the image file you want to add.

6. Your file displays underneath the **File Name** column heading.

7. Select **Background Image**, **Image** or **Stylesheet** from the **Attachment Type** drop-dow list.

8. Enter an **Attachment Description**, something that would be helpful for you to remember.

9. Enter the file name in the **File Name** field. The file name must include an extension (such as .gif).

10. Click the **OK** button.

11. Highlight the image and click the **Use Item** button.

12. Your image displays in the **Selected Image** field as does the **File Name** and **File Description**.

13. Enter an **Image Label** which is your own internal reference for what is being shown. May be the same as Alternate Text.

14. If needed, add **Alternate Text** as a brief, descriptive statement about the image. This would appear on the screen while the image is loading, or if you weren't able to view the image (i.e., screen readers for the visually impaired).

TIP:

Help Text should be short. Some browsers will only render one line of Help Text.

15. If needed, add **Help Text**.

    Running the mouse over an image or text will force a "**Help Text**" box to appear. The message might be, "*Click here for more information*."

16. Optionally, enter a **HyperLink URL**. Clicking on the image will take the customer to another website.

17. If you do enter a value in the **Hyperlink URL** field, select a value from the **Target** field. This allows you to choose if the image URL opens on the same page or in a new page.

18. If needed, select the **Style Tab** and enter any style information that should be applied to this image. Styling can also be done via **Error! Reference source not found.**. See The Style Tab for more information on styles.

19. If needed, select the **Events Tab** and enter any event information that should be applied to this text. See client events in the add question section for more information on events.

20. Click the **Save** button.

Copy Image

The **Copy Image** dialog offers two sections. The top section offers images from the **Library Files**. Images are designated by picking a category and attachment type from the drop-down menus. The lower section shows images copied to **My Files**.

21. Click the **Copy Image** button to copy an image to this request. The Copy Image dialog opens.

22. Choose a **Category** and **Attachment Type** from the drop-down menus.

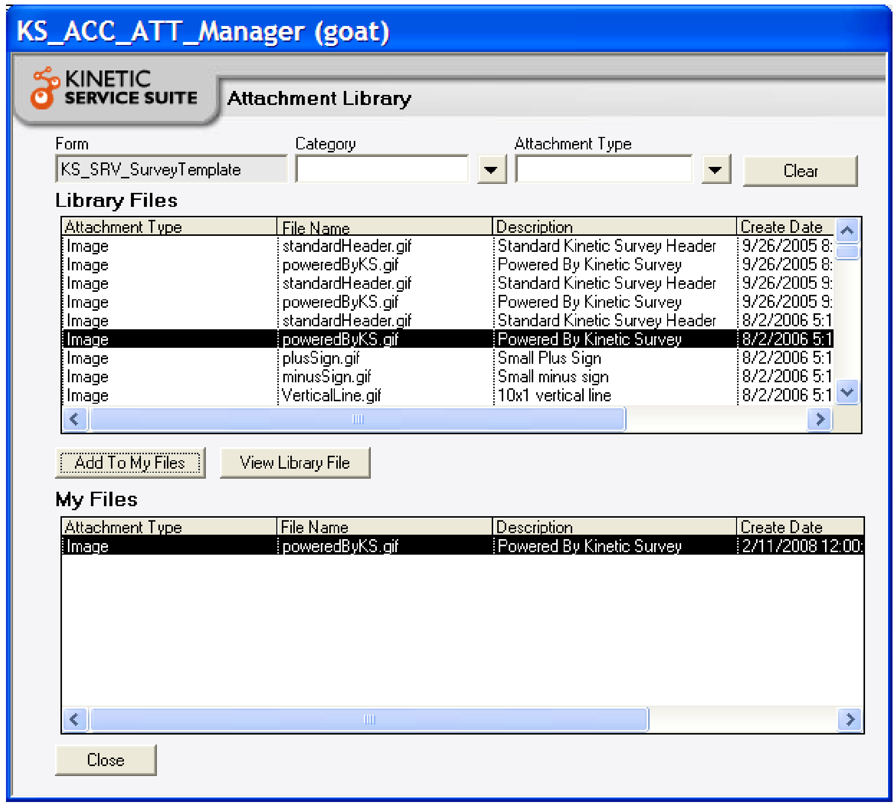


Figure 48: Copy Images from Attachment Library

23. Click the **Add To My Files** button.

24. Click " **Clear**" to empty the Category and Attachment Type fields. All current library files will appear.

Preview

1. To see an example of a highlighted image, click **Preview**. A screen will appear with the image.

2. Click **X** to escape.

COPY EXISTING ELEMENT

IMPORTANT:

If a page or section is selected, everything within that page or section will copy.

You can access all request elements from an existing template (Page, Section, Question, Text) and share them between new or other existing templates through the **Copy Elements** screen.

1. From the **Service Catalog Console** screen select a destination template or item name in the **Service Items** window.

2. Click **Add.**

3. Choose **Copy Existing Element** from the Element Selector dialog. The **Copy Elements** dialog displays.

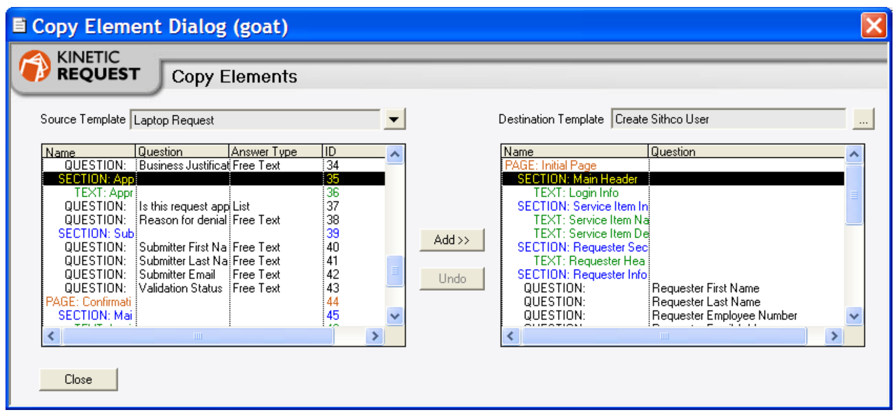


Figure 49: Copy Elements Dialog

TIP:

Undo removes the last action performed, only.

4. Choose a **Source Template** from the drop-down list above the left table.

   The (grayed-out) **Destination Template** field reflects the template receiving new material. Its elements appear in the table field below.

5. Click in the destination elements window to highlight where new material is to be inserted. New material will appear directly under this line.

> **Note:** If a line is not highlighted, added elements will appear at the bottom of the list.

6. Place the cursor in the source elements table field. Highlight element to copy (Page, Section, Question or Text). Only one element can be selected at a time.

7. Click **Add**. Wait for the destination screen to respond.

8. Repeat steps until all needed elements are added to the Destination Template.

Note: A page cannot be added in the middle of another page. New pages will fall immediately after the page selected.

Modifying and Deleting Elements

While on the Pages tab you can modify and delete elements as well as edit pages and rebuild your layout.

Modify Existing Element

You can modify an existing element by highlighting the question, image or other element and clicking the **Modify** button or by double-clicking on the element in the table. The appropriate dialog box displays. Make your modifications on that screen and then select the Save button. For example, modifying an existing question is identical to adding a new question.

Delete Existing Element

1. Highlight the element.

2. Click the **Delete** button.

3. Click the **OK** button when prompted with the dialog.

Important Note: When deleting a question, all data associated with that question will also be deleted including any answers that users have given. If this is an active request, it is suggested that the question be simply hidden to retain consistent reporting against the current results.

Moving Elements

Elements can be moved using the **Up** and **Down** buttons adjacent to the Service Item Description table.

In multi-page requests, **pages** can be moved. Moving a page will move all elements within that page.

Sections can be moved within a page and between pages. Moving a section will include all elements included in that section. When moving sections, be aware that what is recognized as the end of the section may change.

Questions, **Text**, and **Images** can be moved within a page. If one of these elements needs to be moved to another page, include the element in a section, and move the section.

The **ID column** on the Service Item Description table is the sort order for all elements within a request. If you sort the table, and want the default order returned, click on the ID column header to restore the default sort order.

Chapter 4 EXTENDING YOUR REQUEST

THE STYLE TAB

Kinetic Request uses Cascading Style Sheets (CSS) to manage the layout of your request pages and their elements when displayed to a user. CSS allows you to manage styles at different levels including:

- **Template Level:** Styles applied here affect anything within your template and usually correspond to an HTML tag or CSS Class.
- **Page Level:** Styles applied here affect a specific page.
- **Element Level:** Styles applied here affect the specific element.

A basic concept of CSS is that elements "inherit" the styles of anything applied at a higher level. That way, request authors can create default styles at the template level and then more specific styling at each element level, if needed.

There are no default styles shipped with this version of Kinetic Request. Older versions (pre v5.0) included default class and HTML styles.

Request managers are encouraged to create their own CSS Style Sheets, and then attach them either directly to the service item, or include them in the displayPage.jsp file.

USING THE STYLE TAB

From the **Style tab** of the Service Catalog Console view any of the styles applied to your template.

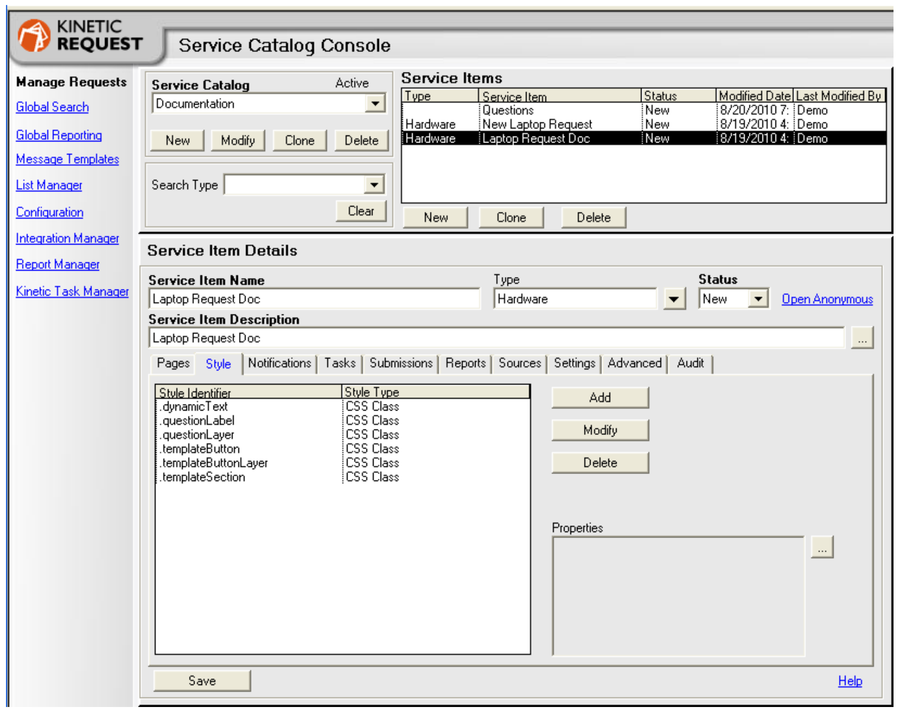


Figure 50: Style Tab

ADD OR MODIFY A STYLE

1. Click **Add** to create a new style.

   Or

2. To make changes to an existing style, highlight the **Style Identifier** and click **Modify**.

   Use drop-down menus and "**Helpers**" or type in changes for style Type, Selector and Properties. See Figure below.

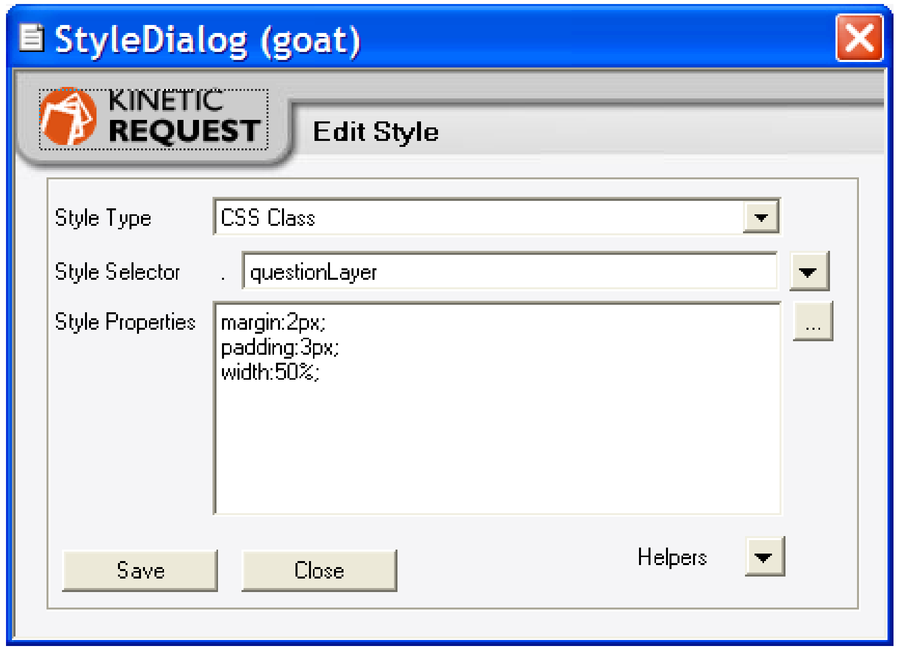


Figure 51: Style Type, Selector and Properties

3. Click **Save** and **Close**.

DELETE A STYLE

1. To remove a style, click **Delete**.

CASCADING STYLE SHEETS-PREDEFINED STYLES

The following is the list of CSS styles created when the HTML for elements is created. These classes are available for use with your own style sheets.

Table 5: Kinetic Request Pre-defined Style Sheet Classes

Element to Modify	CSS Class
Entire Page	pageQuestionForm – on the form tag
Question Layer – entire question	questionLayer
Question Name - displayed to the User	questionLabel
Answer Layer – input HTML tags	questionAnswer

Element to Modify	CSS Class
Answer Value – labels fr list type elements	answerValue
Specific to list answer check box type – in the div tag that surrounds the input tag for the individual check box item	answerCheckbox
Specific to list answer type with radio buttons – inside the input tag for the option	answerRadio
Specific to list answer with list box – in the select tag that encloses the list options	answerSelect
Date question Year input	dateYear
Date question Month list	dateMonth
Date question day list	dateDay
Date/Time question Year input	dtYear
Date/Time question Month list	dtMonth
Date/Time question Day list	dtDay
Date/Time question Hour list	dtHour
Date/Time question Minute list	dtMin
Date/Time question AM/PM list	dtAMPM
Page Layer – first div tag inside the form	templateContent

Element to Modify	*CSS Class*
Image Layer – div tag that encloses the img tag	imageElementLayer
Image itself – inside the img tag	imageElement
Section element – inside the div tag for the section	templateSection
Dynamic Text – inside the div tag for text elements	dynamicText
Submit Button Layer – entire button layer	templateButtonLayer
Submit Button – inside the input tag for the submit button for the page form	templateButton

Table represents the pre-defined Style Sheet Classes used within Kinetic Request.

THE NOTIFICATIONS TAB

From the **Notifications** tab of the *Service Catalog Console*, you can create escalations that will notify people or groups after a request submission. (This functionality is also now available through the Task Builder)

This could include situations where a service manager would be notified after an employee submits a request or an IT manager would be notified after an employee submits a request for a new computer.

From the Notifications Tab you can also create reminders. Reminders are emails sent to request invitees who have not yet filled out their request. For instance, when a customer request has been sent to a customer and the customer hasn't filled out the request, a reminder is sent after a configured period of time to ask the customer to complete the request.

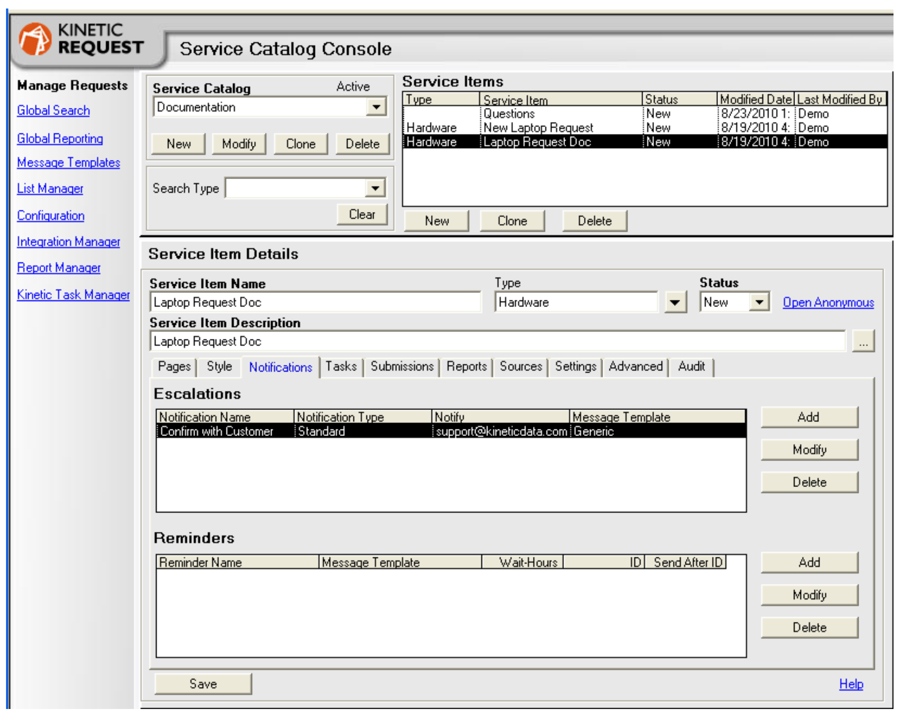


Figure 52: Notifications Tab

USING THE NOTIFICATIONS TAB

On the **Notifications** tab, you can manage both escalations (messages following a request submission) and reminders (reminder messages prior to a request submission).

ADDING AN ESCALATION

1. Click the **Add** button adjacent the **Escalations** fields and the **Notification** dialog displays.

TIP

Expedite the process in developing complex forms that require multiple Message Templates by clicking **View/Modify** or **New Template** from the **Notification** screen.

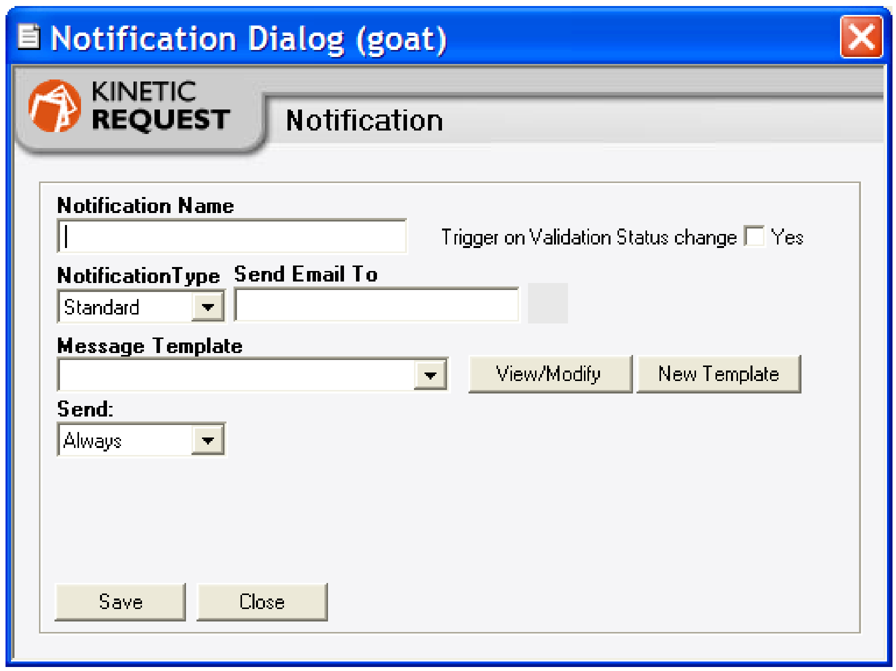


Figure 53: Notification Escalations Dialog

2. Enter a **Notification Name**.

3. Click **Trigger** on **Validation Status change** if you want this notification to be triggered when the validation status changes.

   Without this checked, notifications are only triggered when the request is submitted. Having this checked is useful for forms processing or other process where an approval or other validation is needed. If you are not using a validation process, leave this unchecked.

4. Select **Standard or Dynamic** from the drop-down list for the Notification Type field.

Dynamic Notifications determine the recipient of the message at request submission time. You configure where to get the email address by selecting a question or attribute, that will hold the address.

Standard Notifications are notifications when the email address is static and will not change.

5. Make a selection from the drop-down list for **Send Email To**. If NotificationType is static enter the e-mail address of the person to be notified. If Notification Type is dynamic select the appropriate question or field from its related form from the drop-down menu.

6. Select a **Message Template** from the drop down menu. This is the format of the email that will go out to the person receiving the notification. You can also select the buttons to create a new template or view the one selected. See the section on creating Message Templates for more specifics.

> **Note**: Qualifications using fields from your request (either Base information or answers will appear as <FLD>MenuLabel;ANSWER or BASE</FLD>

7. Choose either "Always" or "When" from the **Send** drop-down
   - "Always" will send your escalation everytime a request is submitted, or anytime a completed request is updated.
   - "When" will un-hide the **Qualification** field and button, and let you determine the desired condition.

   For example, if you only want to send a notification out when a poor score is entered, you might enter a qualification such as 'Score' <70 (score is less than 70 percent). If you are using validation status for forms processing you might enter a qualification such as 'ValidationStatus' ="Accepted".

> **Note:** To use AR System keywords, such as $NULL$, you must format them with an escape character: $\NULL$

8. Click the **Save** button. The new escalation will appear in the escalations table.

TECHNICAL NOTE

Answers to questions are held in character fields in your AR System. Therefore, you cannot create a qualification such as 'Answer1'< 10.

If you want to do a notification using a qualifier like this, you can do so using the Notifications tab on an individual question.

Modify or Delete Escalation

If you want to modify your notification, highlight the notification, click the **Modify** button and make your changes.

If you want to delete your notification, highlight it and click **Delete**.

Adding a Reminder

Reminders are used to “remind” request recipients about a request which they have not yet filled out.

One or more reminders can be created. Reminders can be linked together to be sent one after another, or completely independent. You may have reminders for some of your request participants that are set for three days, while another group of participants could be set for seven days.

1. Click the **Add** button adjacent the **Reminders** fields and the **Notification** dialog displays.

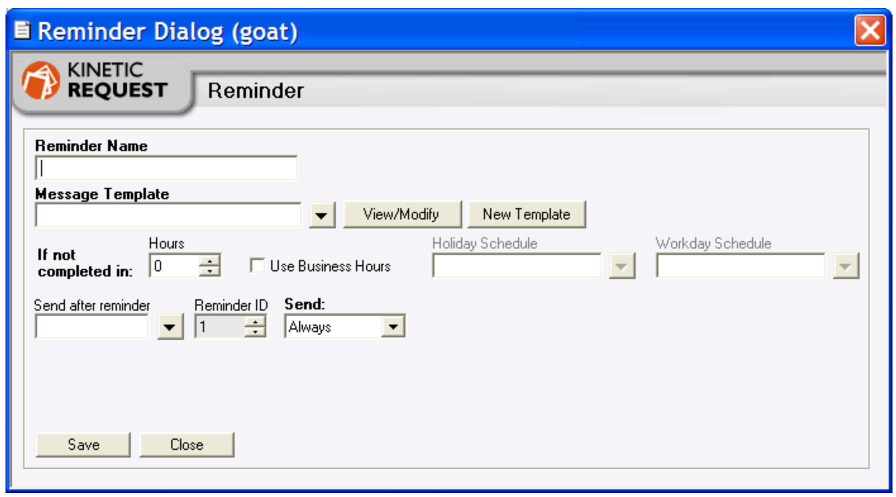


Figure 54: Notification Reminders Dialog

2. Enter a **Reminder Name** in that field.

3. Select a **Message Template** from the drop-down list. If needed, youcan view/modify your selection or create a new template using the buttons next to the drop-down.

4. Select **Hours** using the up and down arrows. This is the length of time the request needs to be completed within, otherwise a reminder is sent to the request recipient.

5. Check the **Use Business Hours** box to access **Holiday** and **Weekday Schedules**.

EXAMPLE:

If a reminder is set for 72 hours, but two of those days include the weekend or a holiday use the Holiday and Weekday Schedules, assuring that the 72 hours are actual business hours applied to this schedule.

> **Note:** Business time is installed by your Administrator. (Administrator – See the MC Remedy Documentation for information on setting up schedules within your AR System server.

6. To have a reminder fire after another reminder, select the first reminder from the **Send after reminder** drop-down**.**

   Example: To perform a series of reminders, you must chain them together. Select a "**Send after reminder"** from the drop-down list. This will cause the reminder to be sent only after the previous reminder is sent.

> **Note**: The days and or hours that are set, are from the "Sent Date" of the request. So, if you want two reminders sent, one at seven days, and then one three days after the first, you would create two reminders. The first set for seven days, and the second for 10 days.
>
> The second reminder would use the "Send after reminder" field and menu to link the two together.

7. Choose either "Always" or "When" from the **Send** drop-down
   - "Always" will send your escalation everytime a request is submitted, or anytime a completed request is updated.
   - "When" will un-hide the **Qualification** field and button, and let you set your own qualification.

> **Note:** To use AR System keywords, such as $NULL$, you must format them with an escape character: $\NULL$

8. Use the **Add Fields** menu to select questions or other fields (such as score or validation status) to include in your qualification. You do not have to add 'Status' = "Sent", this is added automatically.

9. Click the **Save** button. Your reminder will appear in the Reminders table.

Modify or Delete a Reminder

If you want to modify your notification, highlight the reminder, click the **Modify** button and make your changes.

If you want to delete your reminder, highlight it and click the **Delete** button.

THE TASKS TAB

Tasks are used to model the business process that happens after a request is submitted. This process includes notifications, approvals, creating instances in Remedy forms, and many other individual tasks.

There are two ways to create tasks in the current version of Kinetic Request. The default method in version 5 is to use the Task builder, but the previous method is still available.

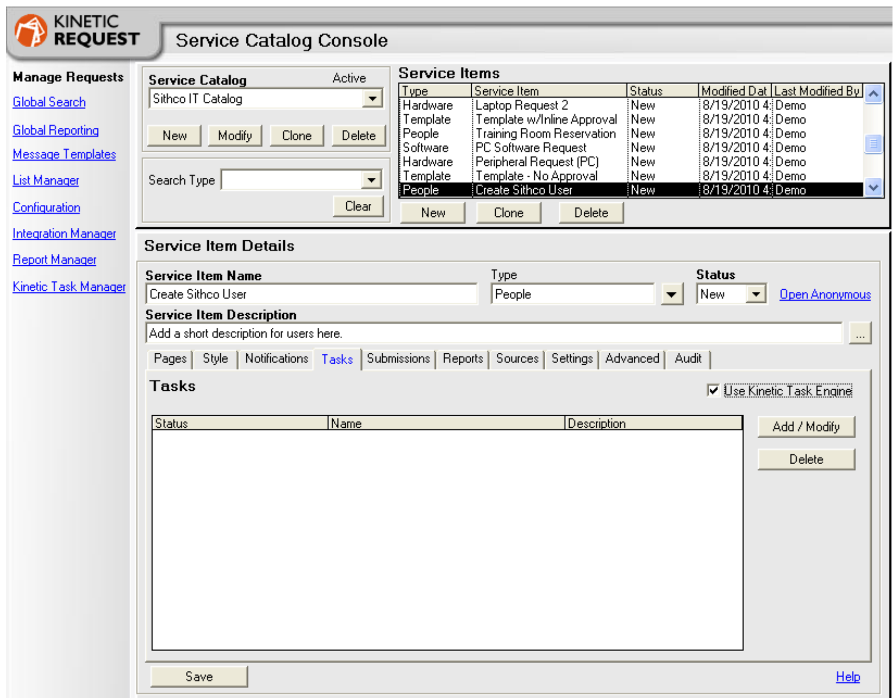


Figure 55: Tasks Tab on the Service Catalog Console

Which task method you use is controlled by the check box **Use Kinetic Task Engine** in the top right of the tasks tab. By default this box is checked to use the new task engine with version 5.You can only use one Task method per service item.

ACCESSING THE TASK BUILDER

The Task Builder is available by clicking on the 'Add/Modify' button on the right side of the table on the Task tab.

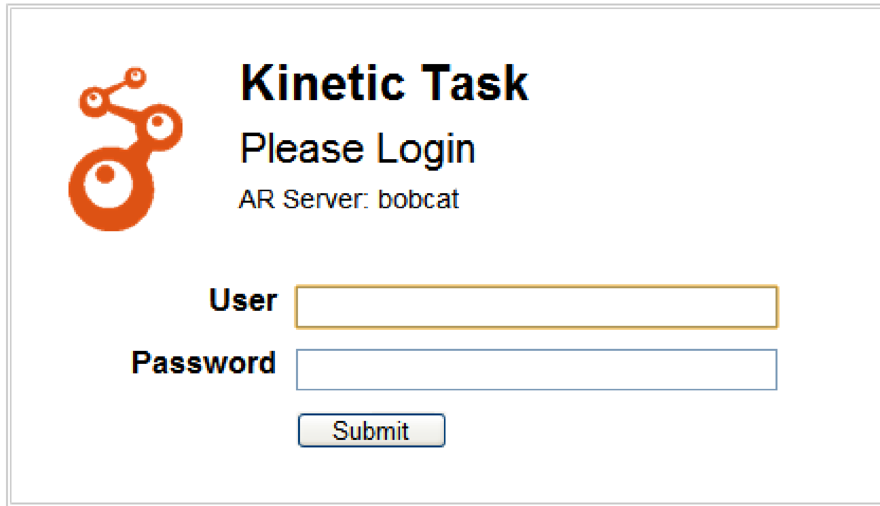


Figure 56: Task Builder Login

You login to the Task Builder with a Remedy administrator user ID and password.

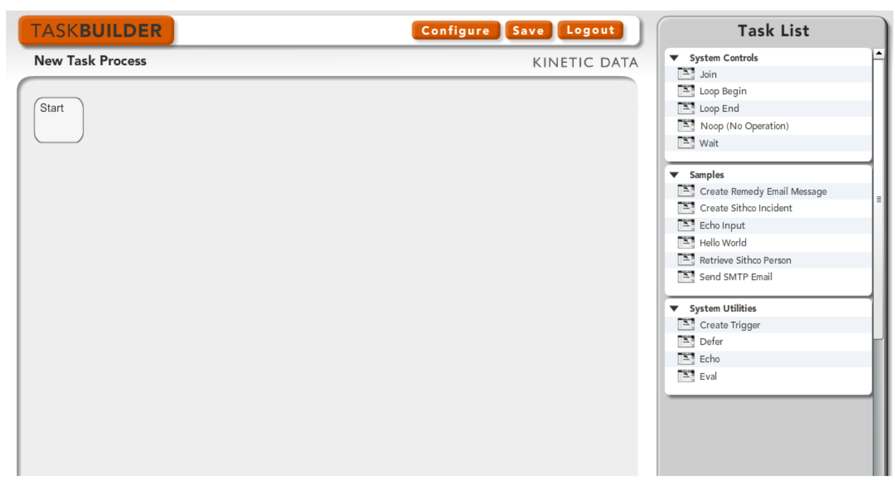


Figure 57: Basic Task Builder

Individual tasks are listed along the right side of the builder. The **Save** and **Logout** buttons are located along the top right of the main builder window.

To personalize your task tree, click the **Configure** button along the top next to the **Sav**e button.

Figure 58: Configure Dialog – Task manager

The fields on the configure dialog are all optional, and data is stored in the Remedy form along with your task tree.

NOTE:

Tasks are added through Kinetic Task Manager console covered later in this manual. Creating the tasks is an advanced process and is not covered in the User manual

Creating Nodes

Nodes are created by dragging a Task from the task list onto the main section of the task builder. Nodes are added to the task builder through a web console available only to Remedy Administrators (see sidebar).

There are a variety of different types of tasks, System Control, System Utilities, and your own tasks that you create and add.

Node Basics

All nodes share some properties. If you hover your cursor over the node, the following details become visible.

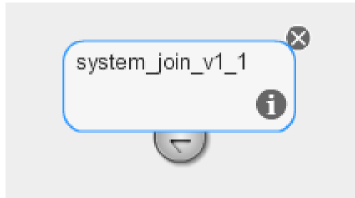


Figure 59: Node Front Details (Join)

The name of the node is across the top, and the x on the upper right corner is used to delete the node (and its related connectors – see below). On the bottom of the node is a icon you click and drag from to connect this node to other nodes. And, if you click on the **i** icon in the lower left corner the node will flip over for you to enter values depending on the type of node it is.

Figure 60: Node Back Details (Defer)

Along the top of the node you can customize the name to make it relevant to your process. Next to the name are the options for **Visible** and **Defers**. If visible is checked, the node and its message will display on the launcher. If Defers is checked, the node will wait for some type of response from the system before continuing along your process tree. The **id** is a unique name for the node that is used in the task engine.

In the lower left corner is an icon you can link to a help page. And, the **Save** and Close buttons are in the lower right.

The **Parameters** and **Message** tabs vary depending on the purpose of the task that the node comes from.

If you hit the **Edit** button, it will open a dialog and the pre-defined values give you the following choices:

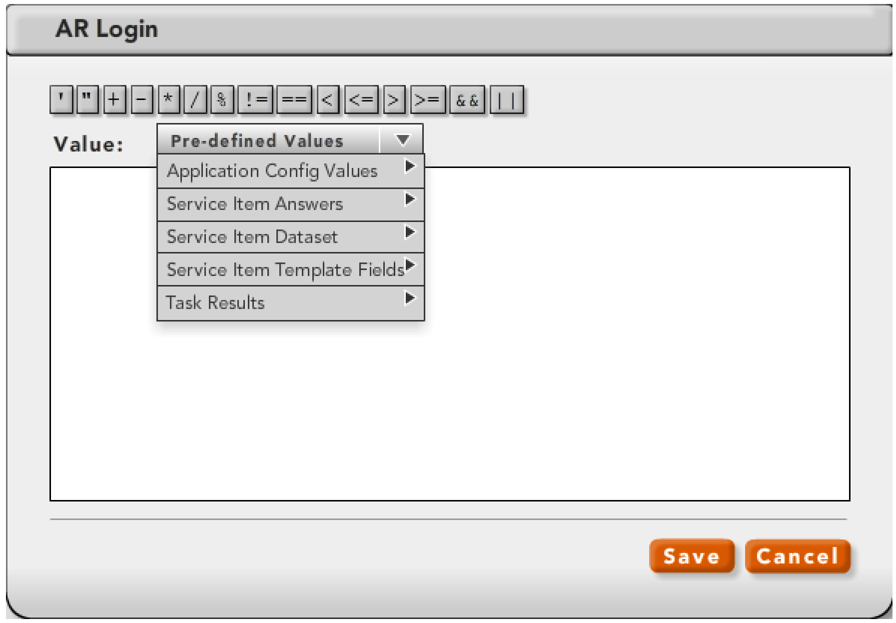


Figure 61: Edit Dialog with Pre-defined Values shown

Application Config Values – Select the Mid-Tier or web server values

Service Item Answers – Answers from your web form

Service Item Dataset – Attributes for the service item

Service Item Template Fields – Other fields associated with the base record

Task Results – returned values from the task, including Request Ids from created records

Types of Tasks – System Controls

Join - Used to bring multiple branches of a task tree together. Three types of joins are *All*, *Any* and *Some*. All indicates that all connectors to the join node must be complete before continuing. Any means that any single connector to the join that completes will cause the tree to continue. And Some means that a certain number of connectors (configured in the node) must complete before the join node continues along the tree

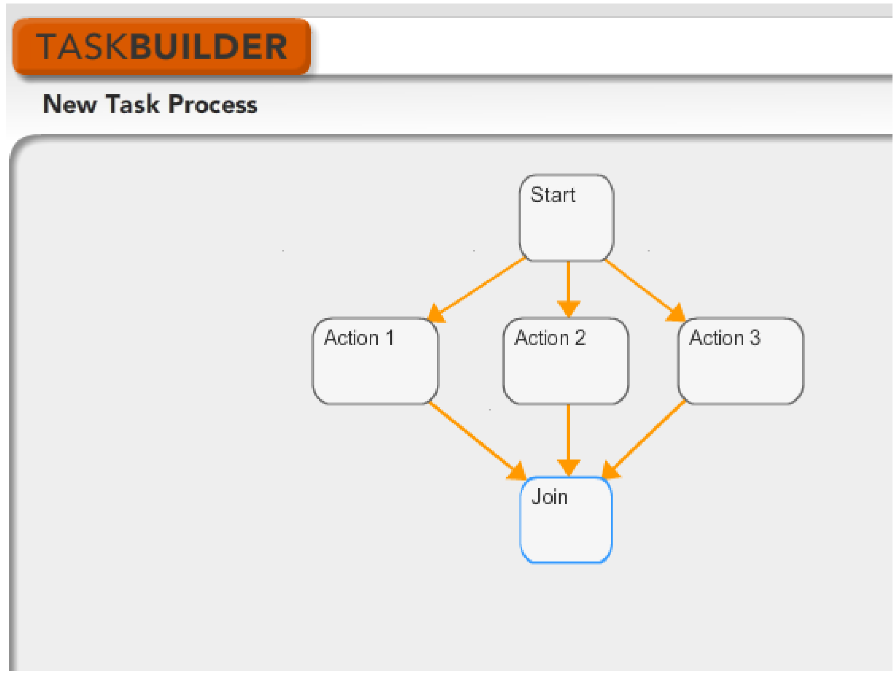


Figure 62: Tree Example with Join Node

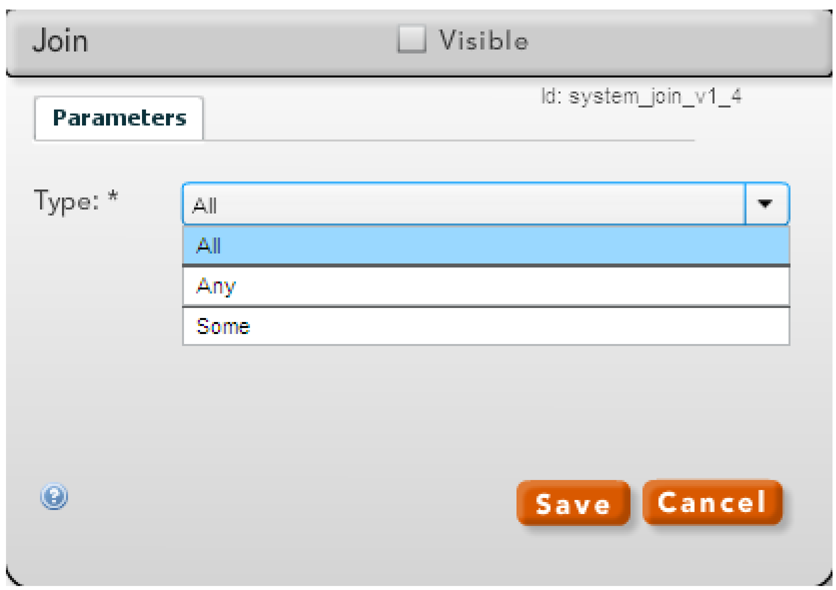


Figure 63: Join Node with Type Options

Loop Begin and Loop End – The two tasks that make up the loop system controls, must be used together. You are able to put any other type of task in the loop. The **Loop End** node on your task tree controls how many times the loop processes. The **Loop Begin** node controls how many instances of the loop are created when the loop is encountered on the task tree.

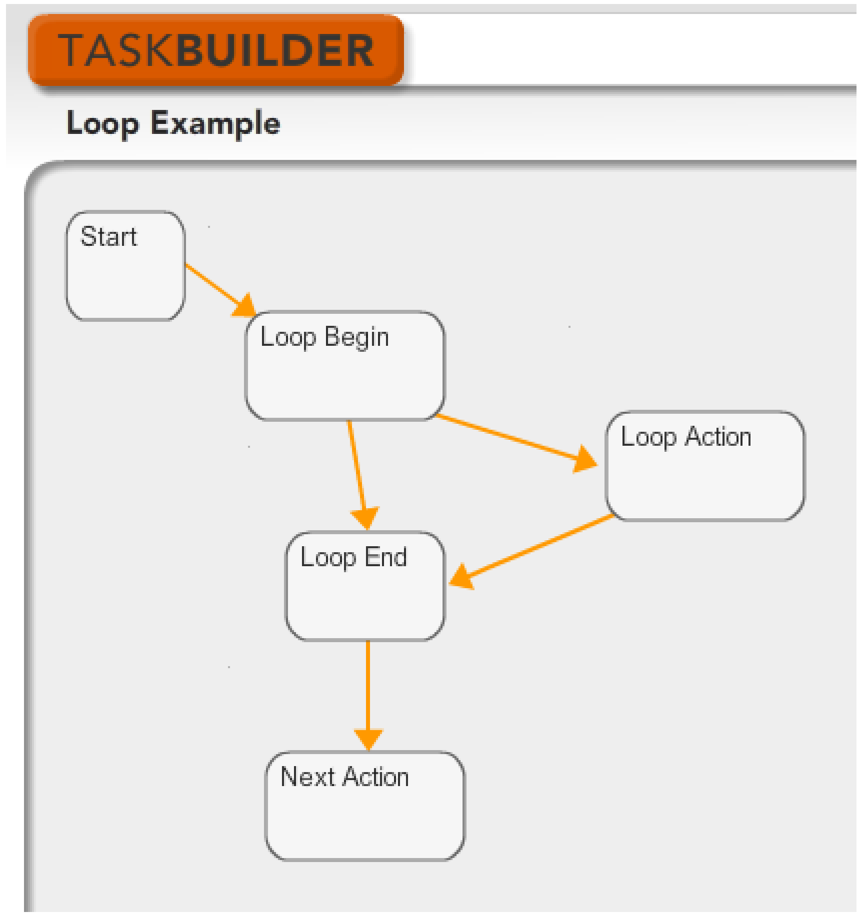


Figure 64: Basic Loop Task Tree

Notice that the **Loop Begin** node has a connector to its **Loop End** node. This connector closes the loop and identifies the actions that are part of the loop.

Loop End nodes have the following options; All, Some, or Any.

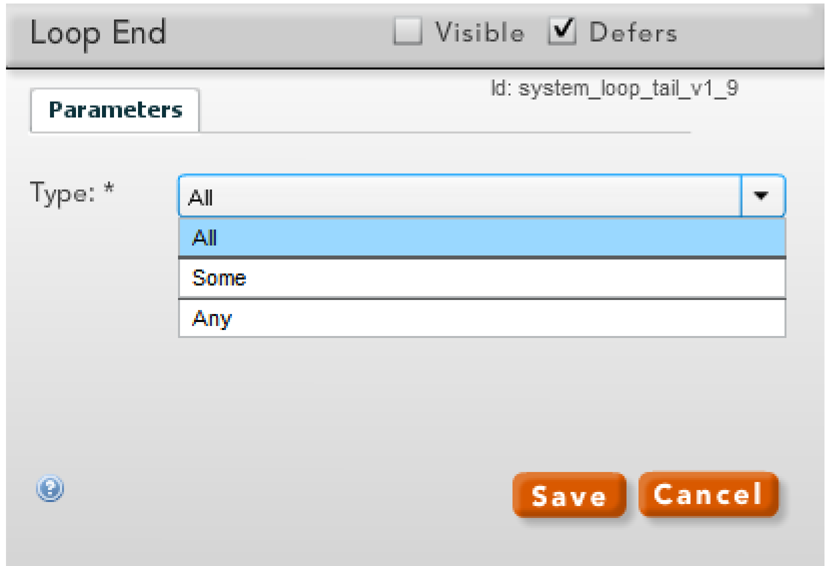


Figure 65: Loop End Dialog with options

- **All** requires each instance of the loop to be complete
- **Some** requires a number (input into a separate field) of loop instances to complete
- **Any** will continue the loop as soon as any of the loop instances is complete.

Loop Begin nodes have the following fields:

Data Source holds an XML string that defines how many instances of the loop are created.
Loop Path is the XPath definition to the particular data for the loop.
Variable Name is a name that can be used in other nodes in the loop to reference the data defined by the Loop Path

All three fields are required.

Example: You want to send a request to a group of approvers. Only 2 of the approvers need to approve for the request to create a ticket. The list of approvers is created by a previous task and placed into the **Data Source** field. Here is a sample list (approvers email addresses):

```
<appEmail>
  <i>Bob@acme.com</i>
  <i>Jane@acme.com</i>
  <i>Charles@acme.com</i>
</appEmail>
```

Here is the **Loop Path** to identify the names:

//appEmail/i

The **Variable Name** can be any text that identifies value defined by the XPath. Example: appEmail or approver_email. This value is used with the following syntax in the nodes within the loop - @appEmail or @approver_email depending on what you put into the **Variable Name**.

Noop (No Operation) – This type of task is used as both a placeholder and label for nodes within a task tree. It performs no set function, and cannot pass any information. The most common use is as a label.

Wait – This task is used to put a predefined delay into a task tree.

Figure 66: Wait Node

There are two fields that let you configure the wait node.

Wait Time is an integer that defines the number of units of time.
Time Unit can be set to minute, hour, day, or week.

Both fields are required.

Types of Tasks – System Utilities

Create Trigger – This task is used to kick start another node on a task tree. You identify the task to start, normally a Defer type of task, by its token.

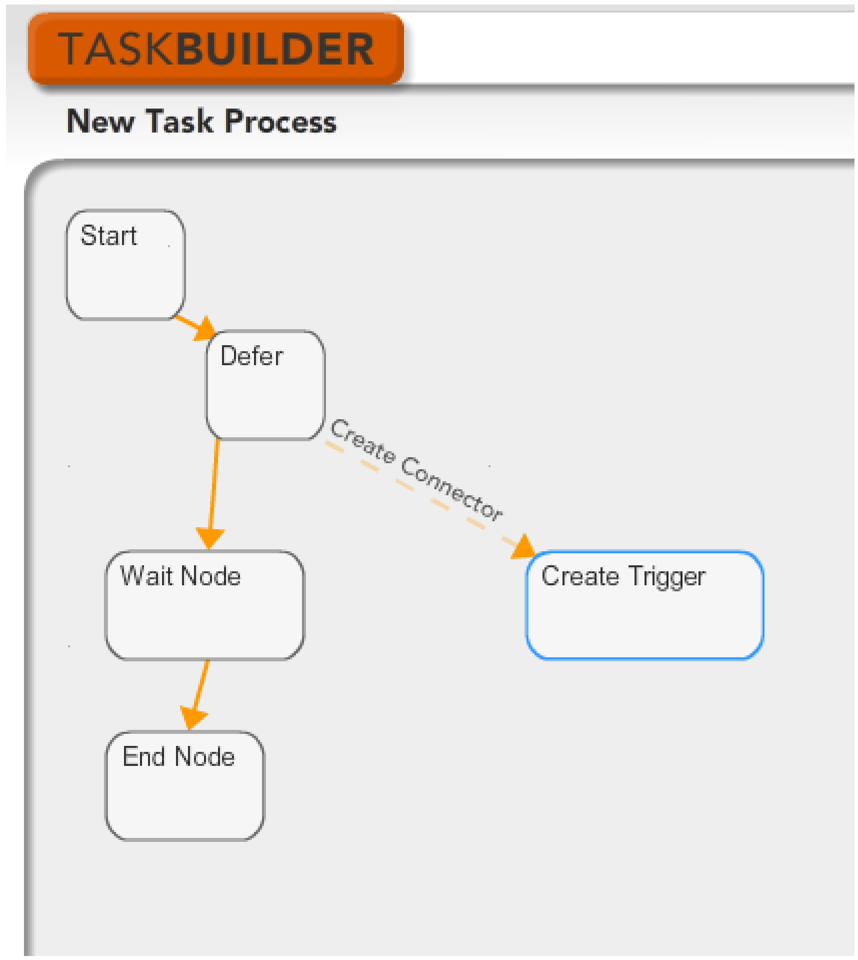


Figure 67: Create Trigger Task Tree

The following choices are available for the Create Trigger node.

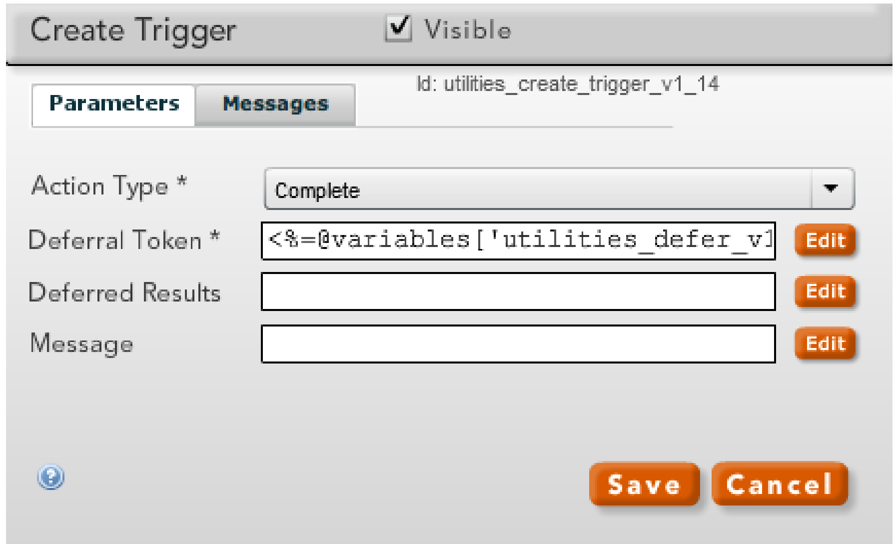


Figure 68: Create Trigger Dialog

Action Type The type of action that Create Trigger node show fire on, Root, Update or Complete.

Deferral Token This is the token value for the trigger that is going to be created. You can access tokens for other nodes through the 'edit' button.

Deferred Results Values to pass to the Deferred node that is being restarted.

Message Text displayed in the console for the node.

Messages – Complete Complete message shown on the console.

Action Type and Deferral Token are required.

Defer – This node lets you pause your tree and wait for some other action to make it continue. The node has a token that you can use to identify it and restart a tree.

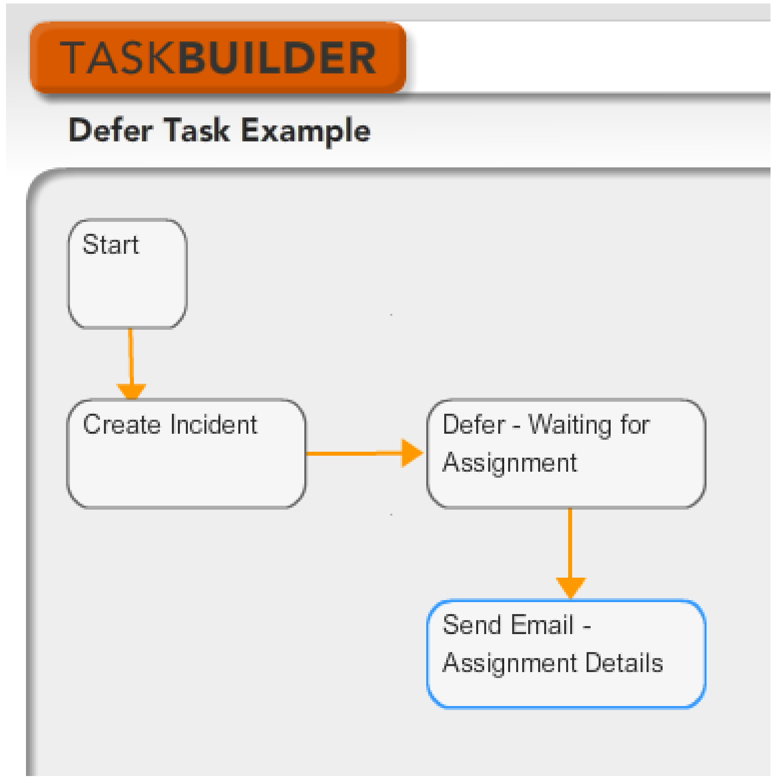


Figure 69: Defer Task Tree Example

The deferred task (Defer – Waiting for Assignment) is waiting for an action from the Sithco Incident (via Remedy workflow) that will trigger it to continue down the task tree.

To update the instance created by the defer node your workflow needs to create either an update or a completion trigger. Messages from the different types of triggers can be displayed in your launcher.

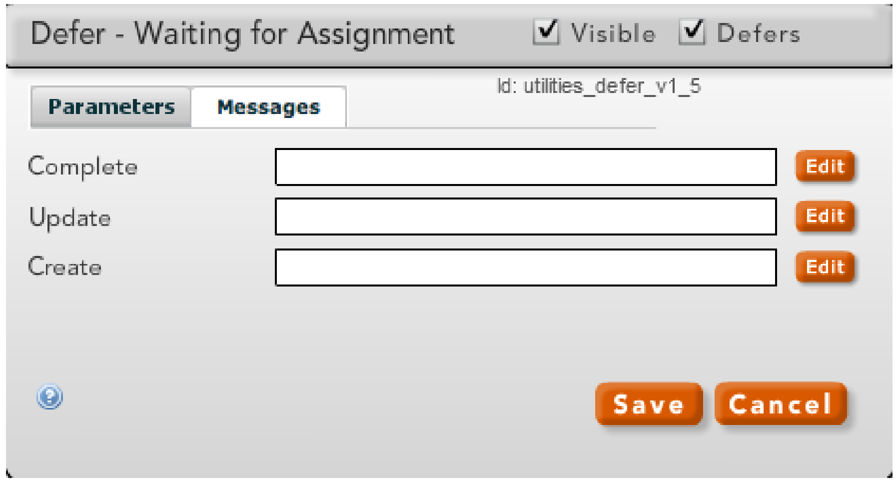


Figure 70: Possible Messages for Defer Nodes

Echo – The echo task is used most often to place a message in an instance. This node is useful for debugging to check returned results from various nodes.

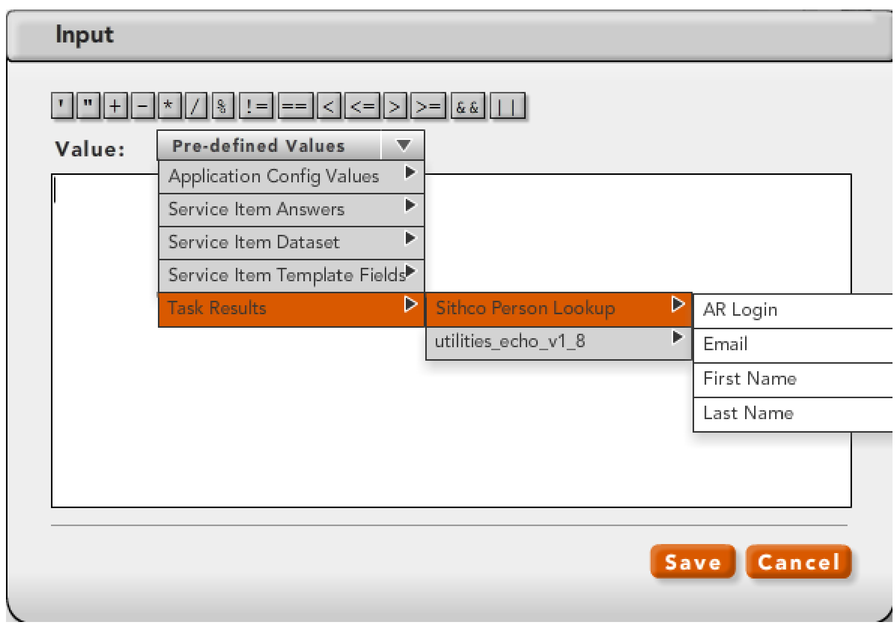


Figure 71: Echo Dialog with Other Tasks Results Shown

You are able to get inputs and results from all the various tasks and data from the request.

Eval – The Eval task lets you perform ruby code and pass the results to the next node in a task tree.

Figure 72: Eval Node Dialog

Use the edit button to add data from nodes and the submitted request.

HINT:

To Delete a Node Connector, highlight the connector and press delete.

NODE CONNECTORS

The arrows that connect the nodes on your task tree have a variety of options. First and most importantly, they provide direction for your task tree. Connectors, by default when a node is complete will move to the next node in line.

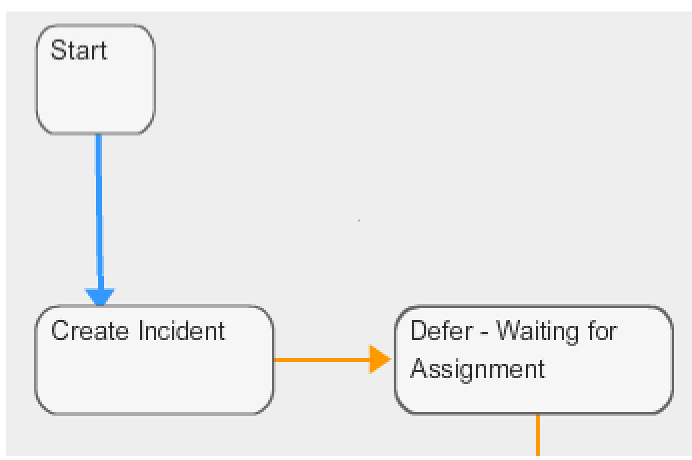


Figure 73: Basic Connector

Highlighted connectors are in blue, while the rest are orange. To change any of the parameters of a connector just double click.

You can add a label to a connector, so that it is more descriptive when you look at the tree

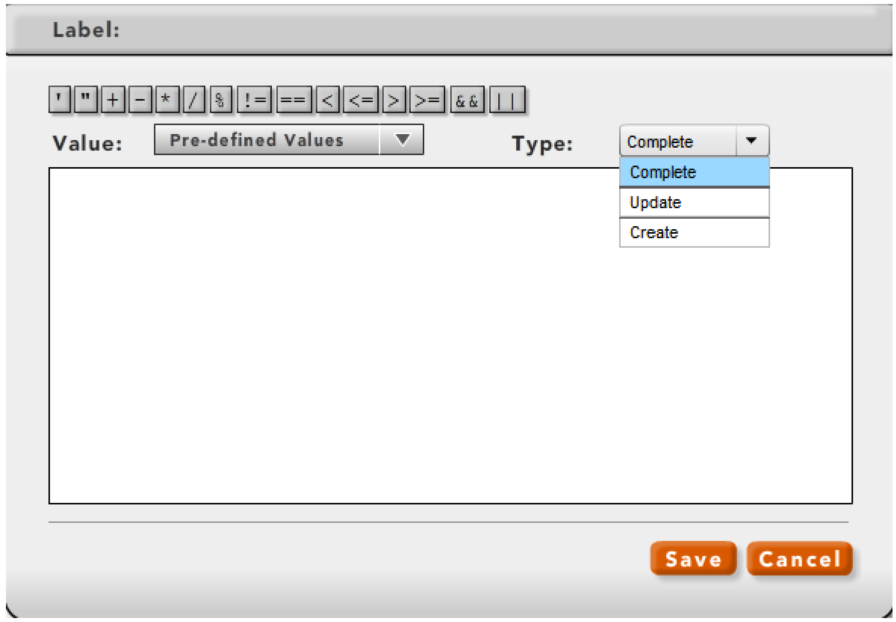


Figure 74: Connector Dialog with Type

The default type is **Complete**, which means the connector progresses to the next node when the current node is set to complete. The other options are Update & Create.

Update – Normally only used with a defer task. The connector fires when the defer node is updated.

Create – This connector fires immediately when the node is created. Also normally used with defer nodes.

Besides the type, you can also limit connectors to operations involving data from the request and results from other nodes. For example an approval node that goes down on tree for “Approves” and another for “Denied”.

PREVIOUS TASK CREATION

This method for creating tasks was used prior to version 5. It is still available within the application, but will not work with the new task builder.

Note: From the **Tasks Tab** you can create records, but not modify existing records.

ADDING A TASK

1. Click the **Add** button. The **Tasks** dialog displays.

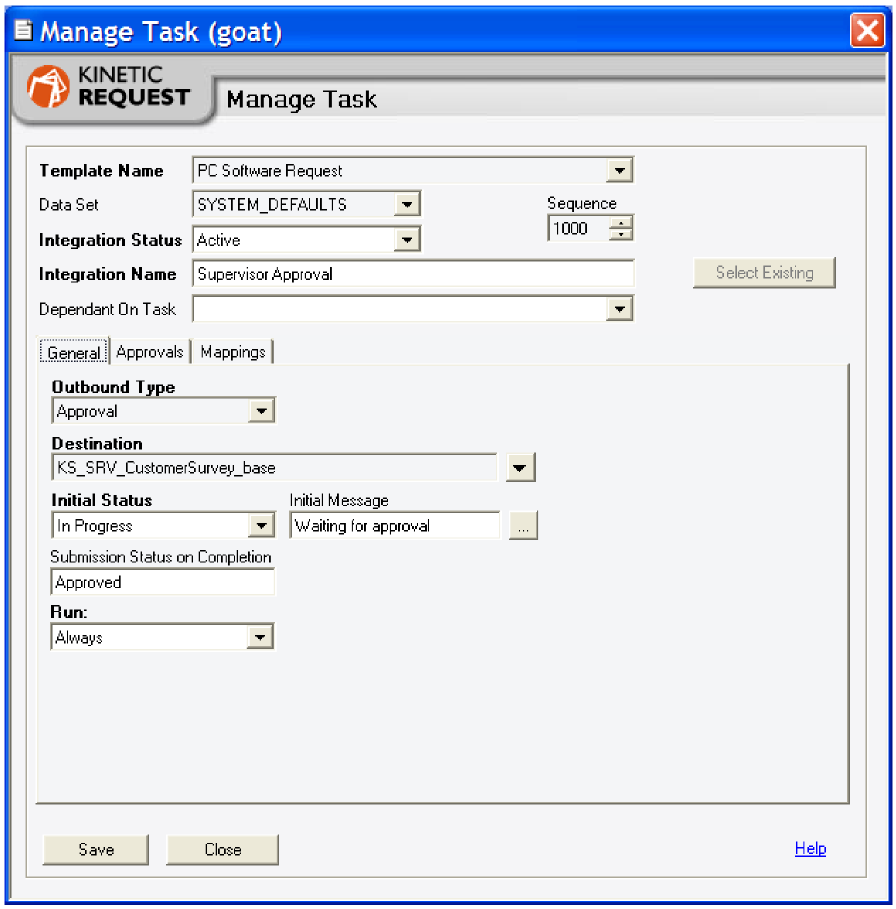


Figure 79: Manage Task Dialog

2. From the drop-down menu select an **Integration Status**; Active, Inactive, Delete or (Clear).

   It is possible to select multiple integrations using a sequencing process. See the following section Sequencing for more information.

3. Under **Integration Name** type a name useful to a user, or click **Select Existing**.

> **Note:** The **Select Existing** button offers established integrations and all accompanying information.

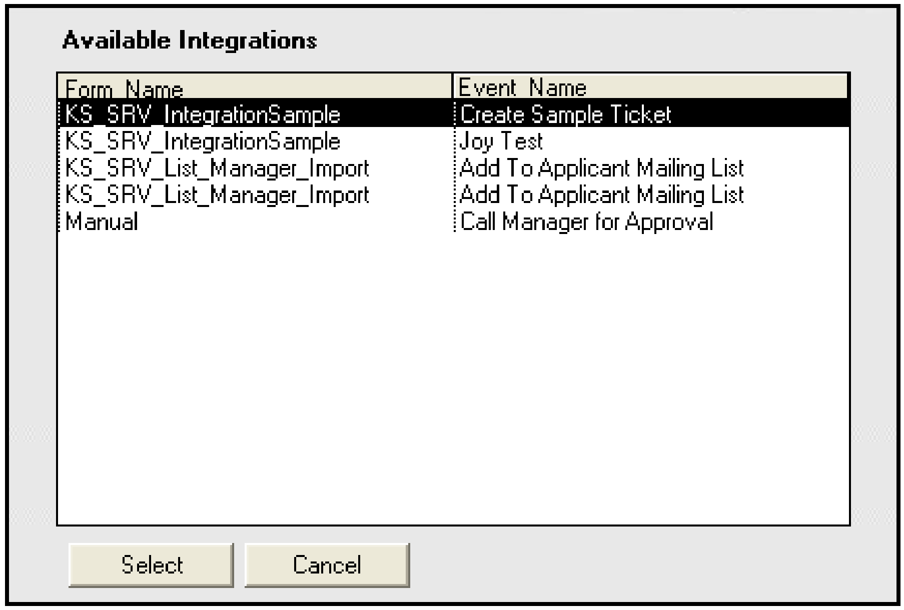


Figure 80: Sample of Available Integrations

4. Click the **Outbound Type** drop-down menu and choose; **Approvals, ARSystem-Form**, or **External**.
   - **Approvals** – creates and manages the status of approvals for requests sent and/or completed. See Approval section, further ahead.
   - **AR System-Form** - automatically creates a record in the specified table based on mapping.
   - **External** – as supplied by your system administrator creates a placeholder within this system from which designated "outside" systems respond and fulfill certain other tasks.

5. Select a receiving **Form** from the **Destination** drop-down menu.

> **Note:** Your Kinetic Request Administrator has selected these forms specifically for integration purposes. They are not representative of the entire list available in your system.

EXAMPLE:

If Joe called Judy as an item from a "**Manual**" task request, he would change the **Initial Message** field from "waiting to call" to "contact completed" thereby notifying all interested parties of the changed status

IMPORTANT NOTE:

The only time "**Initial Status**" is selected is:

- if it is a Primary Task (see Sequencing)

or

- if the "outbound type" is something other than ARSystem-Form

Otherwise, "**Initial Status**" for Primary Tasks is set automatically.

6. Select **Initial Status** from the list if something other than the default is needed.

> **Note:** This information can be viewed prior to the integration of creating records. Also as the process unfolds, look here for other systems to send updated status information for a particular task.

7. Type a relevant **Initial Message** communicating any current status specifics to users. Throughout the process this field will change either automatically via an integration process or manually as users update tasks.

   When this task is complete, the **Submission Status on Completion** field sends a value to the "parent" or overall request as to the task status. Examples are complete, in-progress or anything determined applicable.

QUALIFICATIONS

Create a qualification to determine when this task should be initiated.

1. From The **Run** drop-down, select either "Always" or "When"

- "Always" means the task will fire no matter what.
- "When" will unhide the qualification field and button.

  - Click on the **Qualifications** button. The Advanced Qualification dialog opens.

Figure 81: Advanced Qualification Dialog for Tasks

> **Note**: Qualifications using fields from your request (either Base information or answers will appear as <FLD>MenuLabel, ANSWER or BASE</FLD>

- Make a selection from the **Add Fields** drop-down menu.
- You can also use the value buttons, for example LIKE or <= for more finite searching of established qualifications.

2. Click **OK** to save your changes.

MAPPING

TIP:

If "**Select Existing**" is used it will replace previous mappings after clicking OK.

Mappings allow a user to take incoming request information and map it into a destination form.

Mappings apply to both Approvals and to an AR-System Form. They can be created manually, or by selecting previously created forms from the **Select Existing** list. (Your Administrator would set up these form mappings as part of the integration process).

You can either manually create each one of the mappings, into which to move your questions, of you have the option to copy an already existing mapping through the **Form Mappings** field.

Note: Kinetic Request only creates records. It does not modify existing records.

Creating Mappings

1. From the desired Task, click on the **Mappinfs** tab.
2. Ckick **Add** to create a new mapping, or click **Modify** or double click on the appropriate line in the Mappings table to modify an existing mapping.

Note: each mapping places a value in one field on the target Remedy form, although you can combine answers and static text from the originating request.

IMPORTANT TIP:

To avoid error notifications, it is important to be aware that there may be **required** fields on your destination form. Check that a value is mapped into those fields.

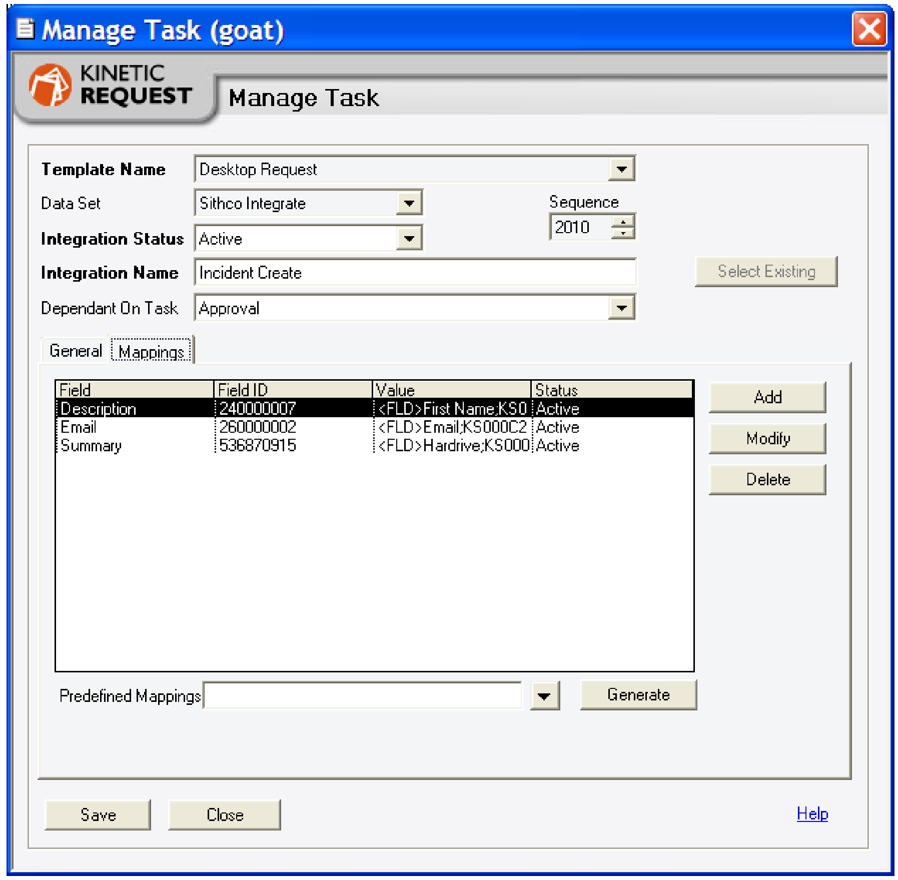


Figure 82: Mappings Tab

3. Select the field from the drop-down list under **Destination**.

4. From the **Source** section of the dialog, select either Base, Section of Task, and then select the specific value and click **Add**.

   Alternately, you could enter static text into the **Value** field, or combine static text with values from the **Field** drop-down list.

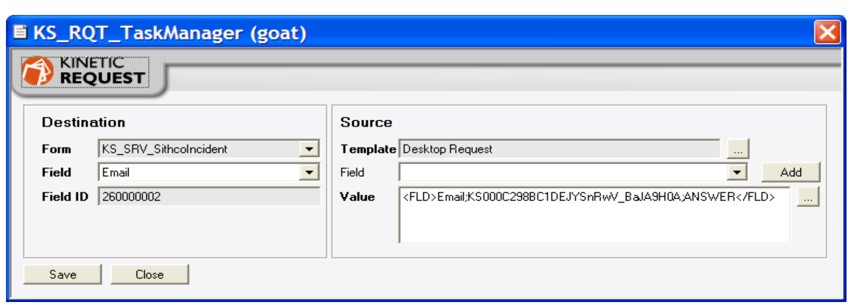


Figure 83: Destination Source Dialog

> **Note:** if fields in your destination form have limitations for size (or maximum number of characters), it is important that you respect that limit in what is sent to the destination source. See The Answers Tab for more information on field limitations.

5. Save the mapping by clicking **Save**. Repeat this process for each field mapping you want to create.

6. Click **Close** when finished.

IMPORTANT NOTE:

Any subtask qualifications are "in addition" to the Primary Task qualifications. If a Primary Task fails, its Dependent Tasks will not run.

SEQUENCING

Task sequencing allows for the creation of tasks that will be dependent on the accomplishments of other tasks.

Primary Tasks, shown in blue under the Tasks Tab, are automatically assigned a number sequence beginning with 1000; a Second Primary Task is then assigned number 2000, and so on.

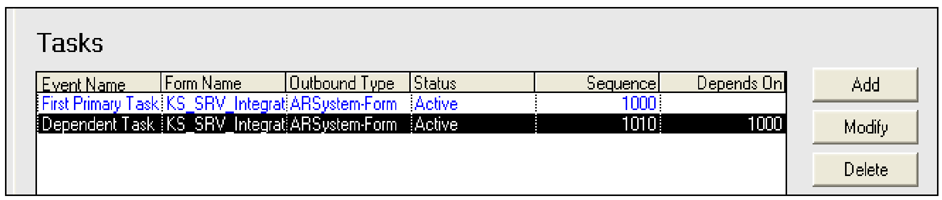


Figure 84: Task Sequencing

Any **Dependent Tasks** of a **Primary Task** are automatically assigned numbers in increments of 10 (i.e., 1010, 1020, 1030, etc.). If more than one process is set-up to run simultaneously, all would qualify as Primary Tasks with any dependent tasks running in parallel sequence. (For example, see diagram below).

Also, See Figure 87: Example: Record Builder Primary and Dependent Task below for an example of how the Primary and Dependent **Record Builder** screens can appear once they are filled-in.

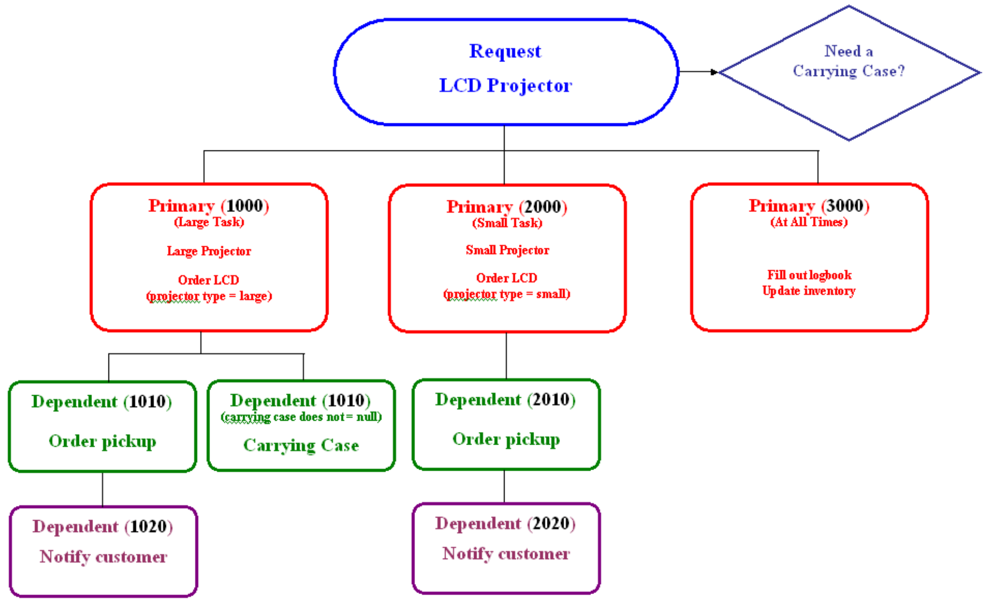


Figure 85: Diagram: Example of Sequencing Tasks

TIP:

Once a Primary Task is created it is set. However, if a Dependent Task is accidentally selected it can be removed by clicking on "**Clear Dependency.**"

To Add a Dependent Task

1. From the Service Catalog Console, Tasks tab, click **Add**.

2. **Type** an **Integration Name** for the Dependent Task.

3. From the **Dependent on Task** field, choose an incremental number, from which this dependent task will follow.

4. Click the **Outbound Type** drop-down menu and choose **ARSystem-Form**, **External** or **Manual**.

Note: ARSystem-Form: The Mappings Tab will appear when ARSystem-Form is selected. See the previous section on Mapping. (An example showing this is provided in **Figure 87: Example: Record Builder Primary and Dependent Tasks**)

5. If applicable, choose **Initial Status; New, Pending, In-Progress, or Cancel**. For **Primary Tasks** the Initial Status will always be "**In Progress**" (See Sidebar Tip).

6. Type a relevant **Initial Message** communicating any current status specifics to users. Throughout the process this field will change either automatically via an integration process or manually as users update tasks.

7. From The **Run** drop-down, select either "Always" or "When"

- "Always" means the task will fire no matter what.
- "When" will unhide the qualification fireld and button.

  - Click on the **Qualifications** button. The Advanced Qualification dialog opens.

Figure 86: Advanced Qualification for Dependant Task

Note: Qualifications using fields from your request (either Base information or answers will appear as <FLD>MenuLabel, ANSWER or BASE</FLD>

  - Make a selection from the **Add Fields** drop-down menu.
  - You can also use the value buttons, for example LIKE or <= for more finite searching of established qualifications.

8. Click **Save** and **Close** to save Record Builder sequencing information.

To Modify A Dependent Task

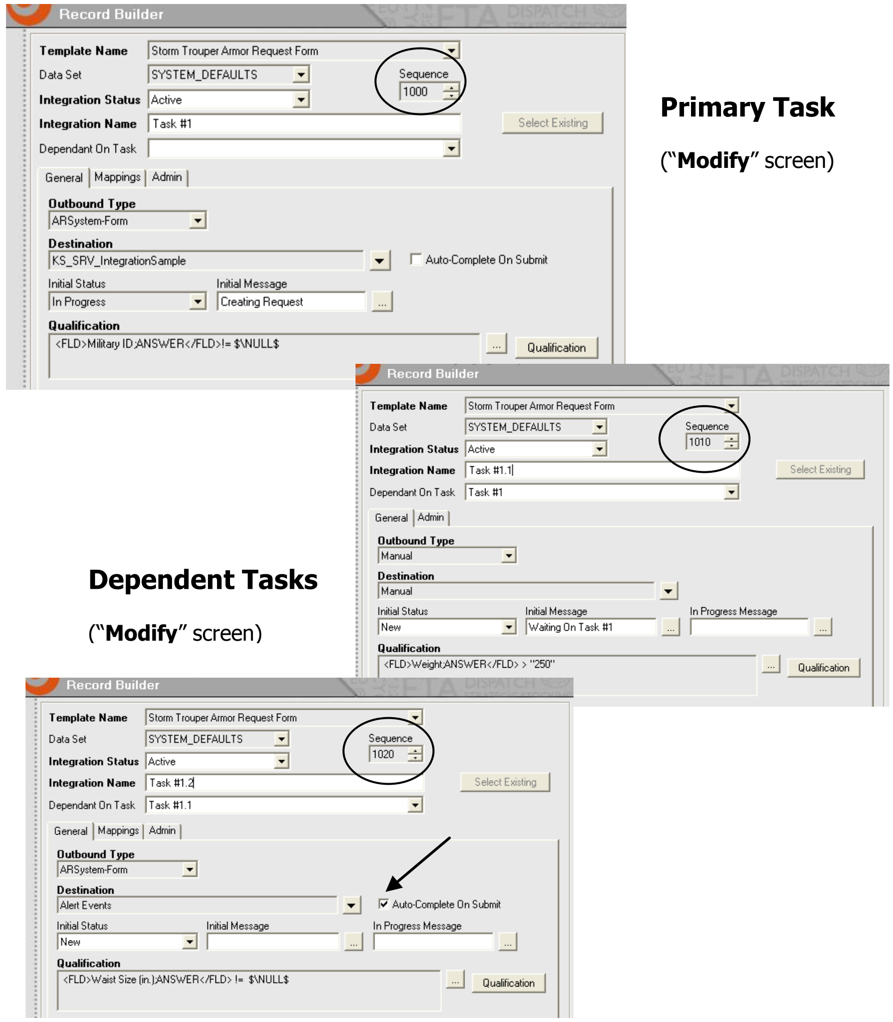


Figure 87: Example: Record Builder Primary and Dependent Tasks

1. Follow similar procedures for the previous section entitled, To Add a Dependent Task.

2. If applicable, check **Auto-Complete On Submit**.

   Check this box if a task should automatically close as soon as a record is created. Leave unchecked if a record will be needed by others in the process.

3. Type a relevant **Initial Message** communicating the status specifics to users. Throughout the process this field will change

NOTE:

Auto-Complete On Submit applies to both Primary and Dependent Tasks, and is a helpful tool to avoid having a person go back into a record and manually close it.

either automatically via an integration process or manually as users update tasks.

4. **In Progress Message** is used when a dependent task moves from "Pending" to "In Progress." This is done automatically when a parent task is completed.

5. Click the **Qualification** button for the Advanced Qualification screen to appear. Qualifications for Dependent Tasks are optional and will be in addition to Primary Task qualifications.

6. Click **Save** and **Close** to save Record Builder sequencing information.

Approval

Approval Types for various service items can be configured as either **Categorized** (requiring different approvers), or as a **Default** (using a static or dynamic field).

An approval creates a specialized type of Task. Normally it is a copy of the request submitted by the original requester with additional questions to be completed by the approver. However, it could also create a specific Approval service item that is generic for multiple service items.

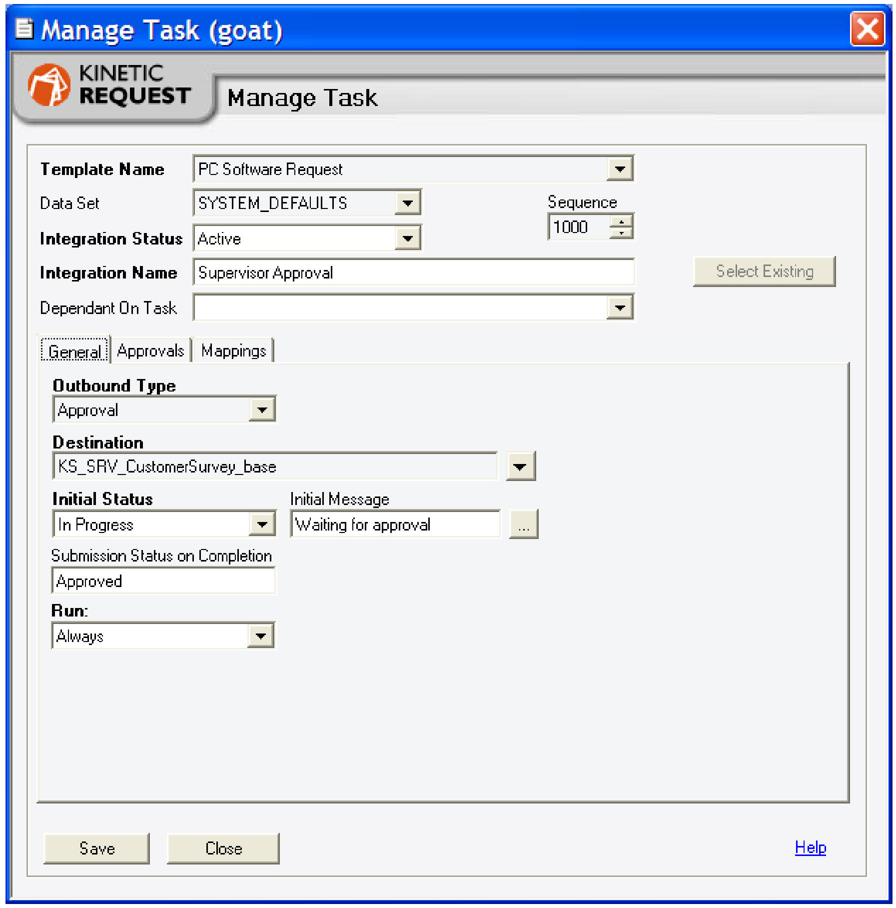


Figure 88: Approval Example

An **Approval Type** can be either **Categorized** or **Default**.

The system can be set up to have a dependency chain with a first level approval, and then a second level approver, dependent on the first level, and so on. This process is similar to dependent tasks in the previous section, **Sequencing.**

Based on a specific field response, a **categorized** approval may involve having different approvers configured where the approver list is based on a selected category. Therefore, depending on how a category is set up, the system can search for customer information (say based on an employee number) and retrieve a name, e-mail address, the correct manager, the manager's e-mail address and perhaps the manager's employee number. These become known, at run time.

In some cases when a customer submits a request, manager information is going to change. The Approver can be totally dynamic, or static, and will constantly be changing.

Using the simple diagram below, if a question on a request is "What is your Department?" and the answer is "Regional Sales", the system will populate a number of fields and the appropriate approvers are contacted. In this case, that response would involve three departments as the Regional Sales Office (First Level Approval), the Corporate Sales Division (Second Level Approval) and the Marketing Department (Third Level Approval).

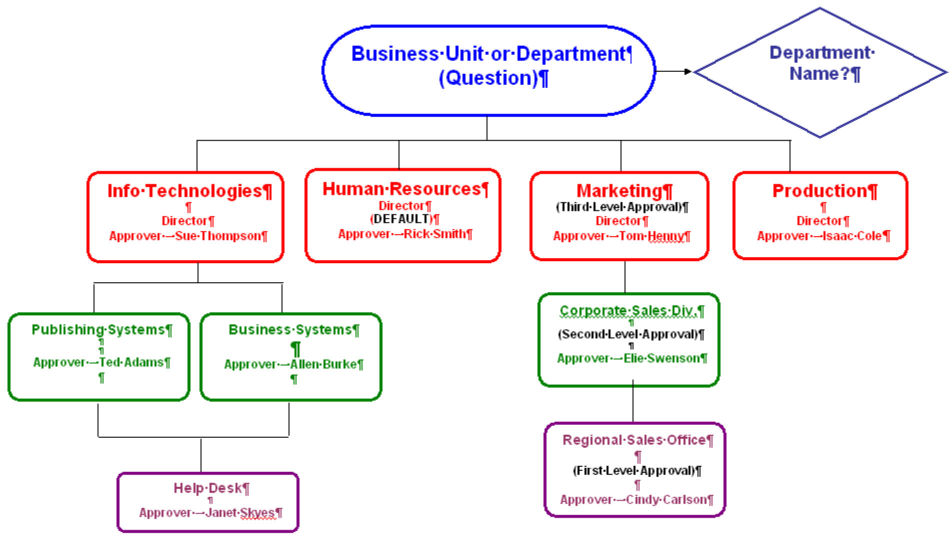


Figure 89: Diagram - Approval Dynamic

A **default** approval works so that every time a qualification is met, this approval will receive an e-mail message. Default suggests only one approver is required for a scenario and can be set up to be static or dynamic.

Add an Approval

1. From the Service Catalog Console, Tasks tab, click **Add**.
2. **Type** an **Integration Name** for the Dependent Task.
3. From the **Dependent on Task** field, choose an incremental number, from which this dependent task will follow, or type in a task.
4. Click the drop-down menu for **Outbound Task** and choose **Approval**. An Approvals Tab and a Mappings Tab appear.

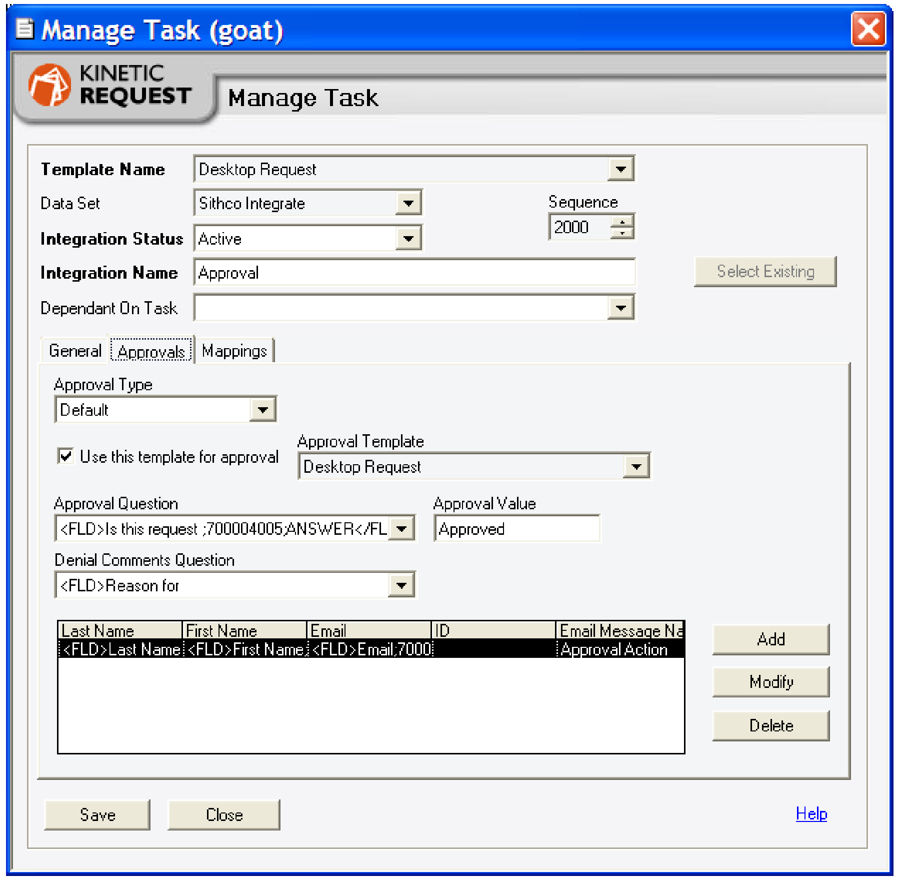


Figure 90: Approvals Tab

5. Click the **Approvals** Tab.

6. Click drop-down menu for **Approval Type** and choose **Categorized** or **Default**. If **Categorized** is chosen, a new **Approval Category Field** appears.

   As the field that ties this value back to the request, choose from the selections offered.

   Note: There are two options for the actual **approval form section,** that is sent to the Approver.

   Choose the current service item with the approval section "hidden" from the requestor, but it would appear in the approver's version.

   or

Apply the approval section to a completely different template.

7. **Use this template for approval.**

    - **Check** the box for to use the same Approval template option.
    - **Uncheck** the box and choose a template on which to apply the approval section.

TIP:

An **Approval Question** might be as simple as "Is this request approved?"

The **Approval Value** is what constitutes a request being approved. It might be simply "Yes" or "No" or "Approved" or it could appear in the form of a List box offering; Approved, Denied, or Temporarily denied. It could also be approved in Spanish, as an example.

If the value equals "Yes" the request would be approved. If it is anything other than "Yes" it would be considered denied or not approved, and would require Denial Comments from the Approver.

8. Choose an **Approval Question**. See Sidebar Tip.

9. Choose an **Approval Value**.

10. Choose a **Denial Comments Question**.

    If an approval is denied, the **Denial Comments** from the Approver returns to the Task and can be used for notifying the user by displaying the information. ***Example:*** *Your request has been temporarily delayed due to a backorder issue. You will be notified when the item has been restocked. We apologize for an inconvenience this may have caused.*

11. Click **Add** to enter Approver contact information.

12. Enter **First Name** of the Approver.

13. Enter **Last Name** of the Approver.

14. Enter **Email Address** for the Approver.

15. Enter ID for Approver, if applicable.

16. Choose an **E-mail Message Template** from the drop-down menu.

17. Click **Save** and **Close**.

Backups

If the same question is given, as above, and this time the answer is "Production" and the Approver for Production is out of the office for two weeks, the approval can be set up to default, in this case, to the Human Resources Approver as a **backup**.

Backups can be configured to operate in different scenarios. They can operate as a regular backup for an approver all the time, or during a specific amount of time (say vacation time for the approver), or a combination of the two, consistently.

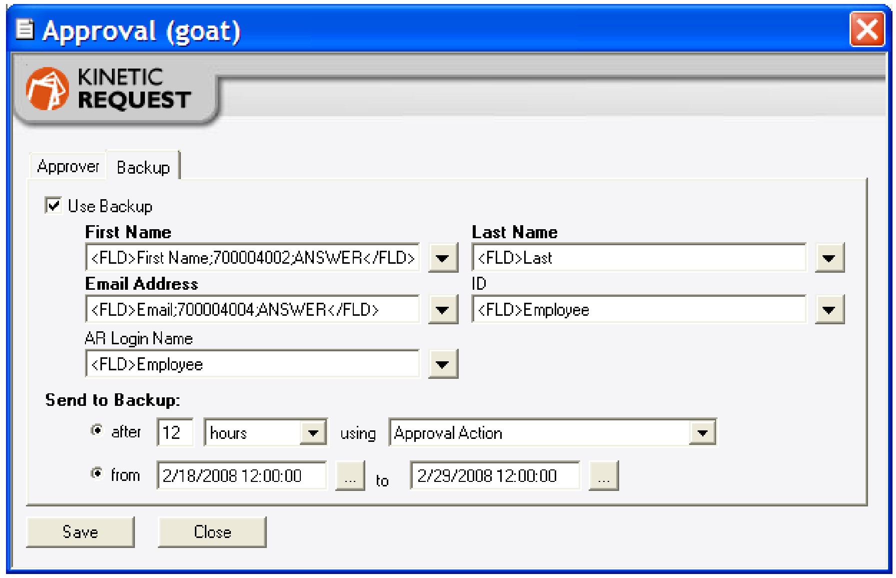


Figure 91: Backup

1. Check the **Use Backup** box.
2. Enter **First Name** of the backup person.
3. Enter **Last Name** of the backup person.
4. Enter **Email Address** for the backup person.
5. Enter specific backup timeframe information, if applicable.
6. Click **Save** and **Close**.

Form Mappings

Mappings apply to all elements on both Approvals and to an AR-System Form. They can be created manually, or by selecting previously created forms from the **Predefined Mappings** list. (Your Administrator would set up these form mappings as part of the integration process).

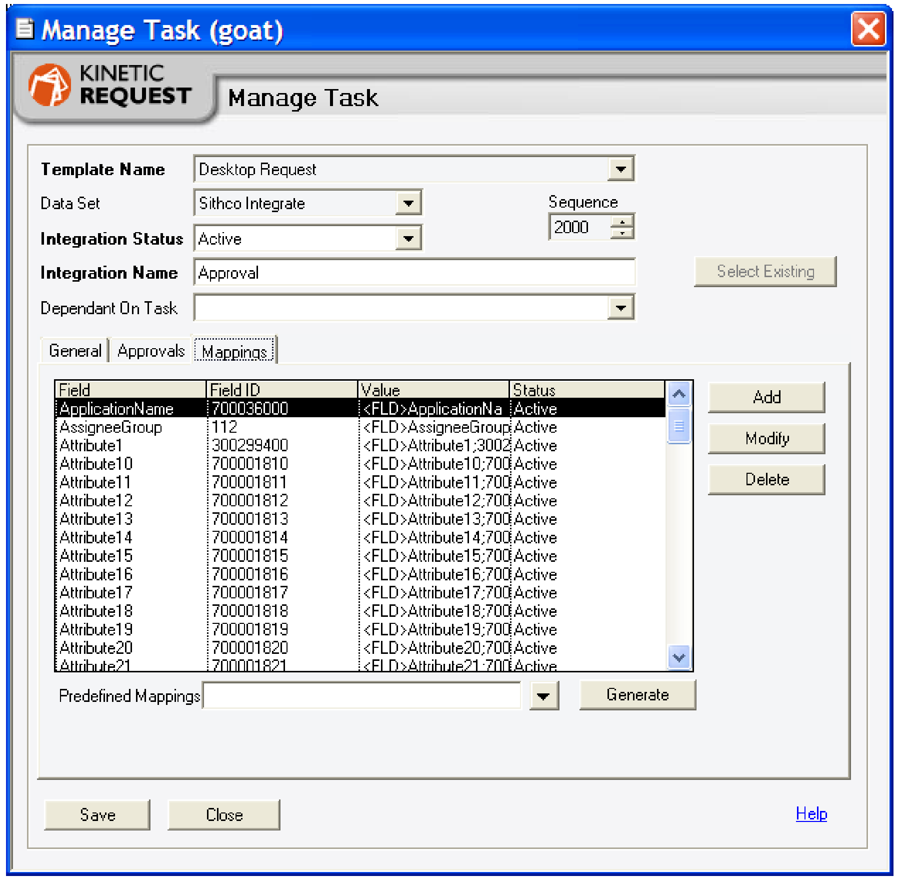


Figure 92: Form Mappings

Optional Approval Method – Link to Last

The default view for an approver is to see only what the original requester submitted. Therefore, if you have multiple approvers they will not see what the other approvers have noted on the request, only that they need to approve or deny a request.

With the Link to Last option, information provided by the previous approver is available to the current approver. You will need to add a field for approvers to put their notes onto your service item. The information that will eventually be passed to another form via an AR System form is still just the information from the original requester, but this will let your approvers have more information.

To activate the Link to Last functionality change the mappings for each approver for the field LookupValueId from

<FLD>CustomerSurveyInstanceId;179;BASE</FLD> to the text "LINK_TO_LAST". The workflow is already in place to recognize this change.

THE SUBMISSIONS TAB

The **Submissions** tab of the *Service Catalog Console* allows you to:

- Search for and view the status of requests sent and/or completed.
- For forms processing, you can also accept or reject a submission, add notes and other information.
- Send a new request to another participant or generate a new request to capture results through phone interviewing or other methods.
- Fill out sent requests
- Resend existing requests

USING THE SUBMISSIONS TAB

The Submissions tab is viewable by both Request Inspectors and Request Managers. Therefore, if you have Request Inspectors that are monitoring request results they can use this tab to do so, without giving them permission to actually change request templates or other configuration items.

SEARCH FOR CUSTOMER REQUEST(S)

1. Access the Service Catalog Console.
2. Highlight the name of the service item.
3. In the Service Items Details section of the screen, select the **Submissions** tab.

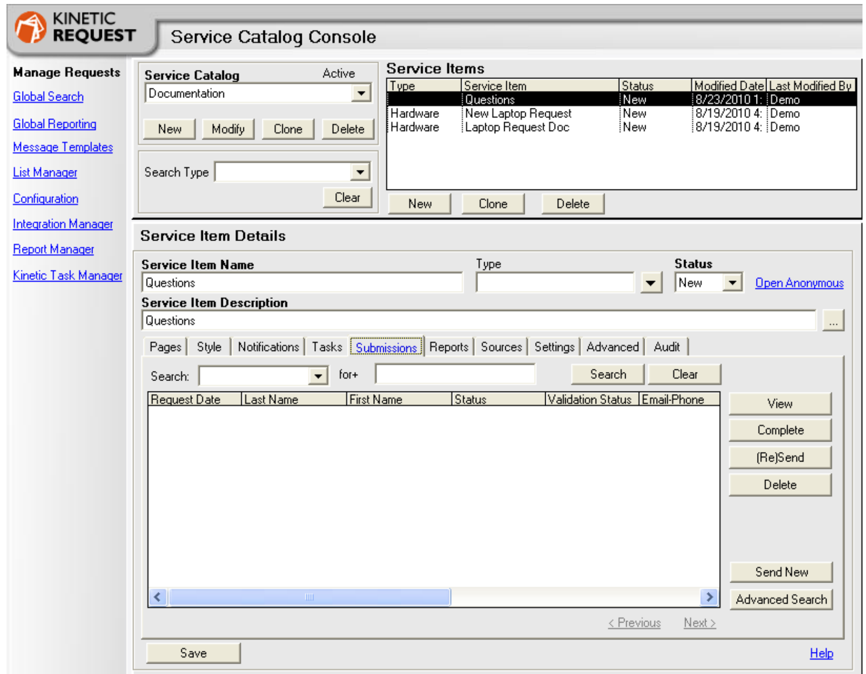


Figure 93: Submissions tab on the Service Catalog Console

4. From the **Search** field, select an item to search for from the menu:

5. In the **For +** field, enter the criteria to search for (if any).Press **Return** (or click **Search**). A list of requests matching the criteria appears in the table below.

6. To clear the **Search** and **For +** fields and begin a new search, click **Clear**.

View a Customer Request

You can view the answers of an existing request via the **Submissions** tab. Any request whose status is either "In Progress" or "Completed" can be viewed.

1. In the Service Item Details section of the screen, select the **Submissions** tab.

2. Select a Request from the table.

   - If the request has "In progress" or "Completed" status click the **View** button to see the answers and attributes.

   - If the request is in a "Sent" status click the **Complete** botton to open the request in your default browser.

The **Completed Submission** form allows Request Inspectors to view the answers that this submitter has entered as well as other information about the request.

Request Inspectors can change answers and some request values from this screen. Any changes made to the request are audited including who made the change, when the change was made and what the previous value was.

If your process includes validation of requests or form information, the Validation Status can be changed, which can also trigger new notifications.

The Completed Submission form includes the following fields:

Table 6: Completed Submission Fields-Main Fields/Answers Tab

Field Name	Description
Main Fields/Answers Tab	
Category	The request category
Request Name	The name of the request
Sent Date	The date the request was sent. If the request was "resent" this date is the most recent request sent date.
Status	The status of the request.
Company Name	Participant's company name For anonymous requests, this field is blank.
First Name	Participant's first name. For anonymous requests, this field is blank unless a question was mapped to this field value. See Add New Question
Last Name	For anonymous requests, this field is blank unless a question was mapped to this field value. See Add New Question
Request Sent To	E-mail address that the request was sent to. For anonymous requests, this field is blank unless a question was mapped to this field value. See Add New Question
Score	Score of the request itself
Possible Score	The highest score a respondent would receive for those questions that they completed. This possible score does not include questions answered with a "Not Applicable value".
Score %	Score/Possible Score
Answers Table	This table field includes all the answers that have been completed for the request. Double-clicking on the table will open the individual answer.

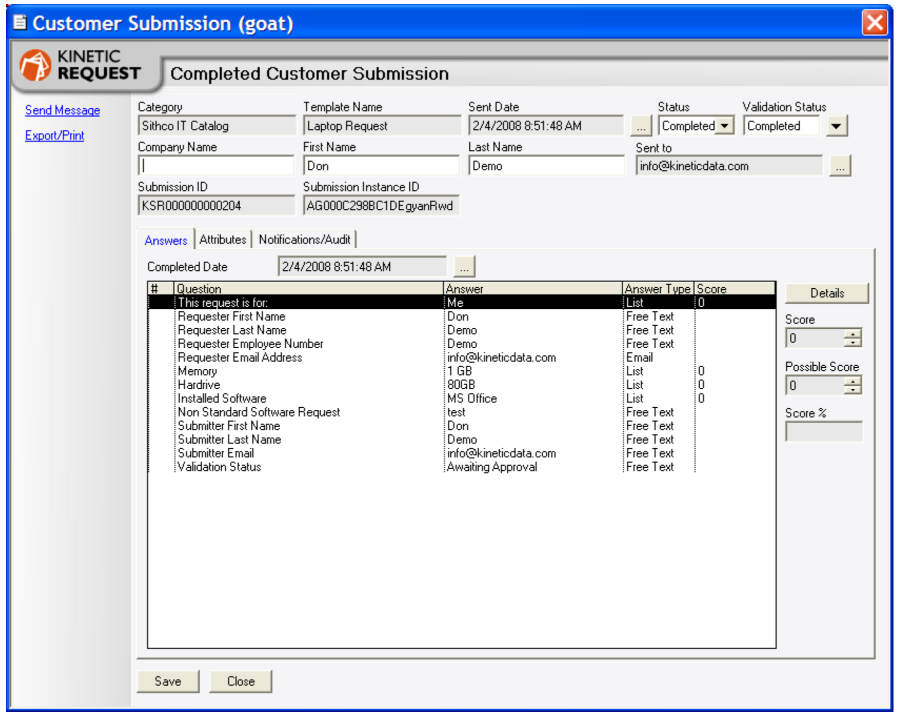


Figure 94: Answer Detail View

From the **Attributes** tab other request information can be seen. Besides the individual attributes, this includes:

Table 7: Completed Submission Fields-Attributes Tab

Field Name	Description
Attributes Fields	
Originating Form	The originating source form that triggered this request.
Originating ID	The originating ID related to the Originating Form that triggered this request.
Is Anonymous	Checked if the original context for this request was anonymous.
IP/CallerID	The IP address of caller information of this request submission.

The **Notifications/Audit** tab includes information on notifications (invites, reminders, and escalations) that have been sent relating to this request, as well as audits of any information that has been changed and a field to hold internal notes.

Table 8: Completed Submissions Fields-Notifications/Audit Tab

Field Name	Description
Attributes Fields	
Notifications Table	This table displays all of the notifications that have been sent out for this request. These include request invites, reminders and escalation notifications.
Audit Table	This table displays all of the audit information for the request. Audits include any request values that have been changed including answers, names, validation status and other fields.
Internal Notes	This field can be used to capture any notes regarding the follow up on this request/form. The timestamp/User is stamped at the top of the field when any additions are made.

Sending a Message

From the Submissions dialog, you can send a new message for this request. This will send a custom email message offer to any email address.

Click on Send Message. A dialog will open. Fill out the appropriate fields, and an email will be sent to the intended recipient.

Export/Print the Request

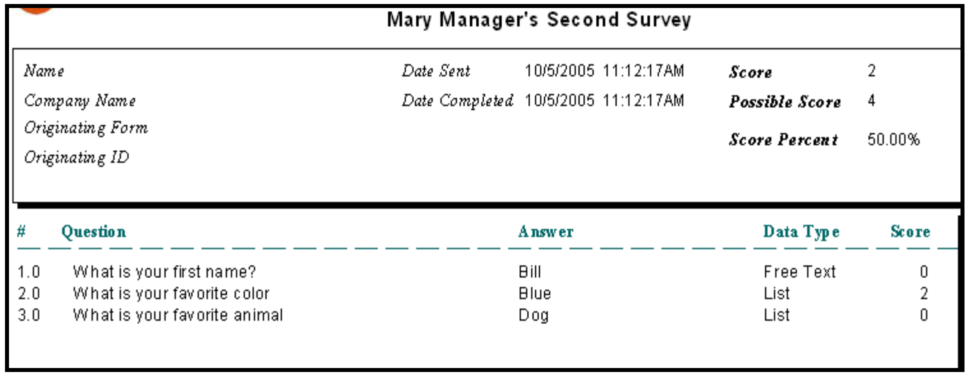
From the Submissions dialog, you can export or print the answers via an included Crystal Report.

Click on **Export/Print**. A dialog will appear with the information from the customer request. This data can be printed or exported from this dialog.

NOTE

If using Remedy's Mid-Tier, you must have Crystal Enterprise installed and configured to view Crystal reports over the web. Crystal Enterprise is a separate licensed product. See your Remedy AR System documentation for more information.

For clients viewing request results via the Mid-tier without Crystal Enterprise, the report that is shown is a simple AR System report listing the answers.



Mary Manager's Second Survey

Name	Date Sent 10/5/2005 11:12:17AM	Score	2
Company Name	Date Completed 10/5/2005 11:12:17AM	Possible Score	4
Originating Form		Score Percent	50.00%
Originating ID			

#	Question	Answer	Data Type	Score
1.0	What is your first name?	Bill	Free Text	0
2.0	What is your favorite color	Blue	List	2
3.0	What is your favorite animal	Dog	List	0

Figure 95: Printing or Exporting a customer request

Sending or Generating a New Request

From the Submissions tab of the Request Manager, you can manually send out a new request or resend a request to a participant.

To send out new requests, the Request Template Status must be **New** or **Active**.

Send a Request To a New Participant:

1. Access the **Request Manager**. See Accessing the Request Manager.

2. Highlight the name of the Service Item.

3. In the **Service Item Details** section of the screen, select the **Submissions** tab.

4. On the right side of the **Service Items Details** section, click **Send New**. The **New Customer Request** screen appears.

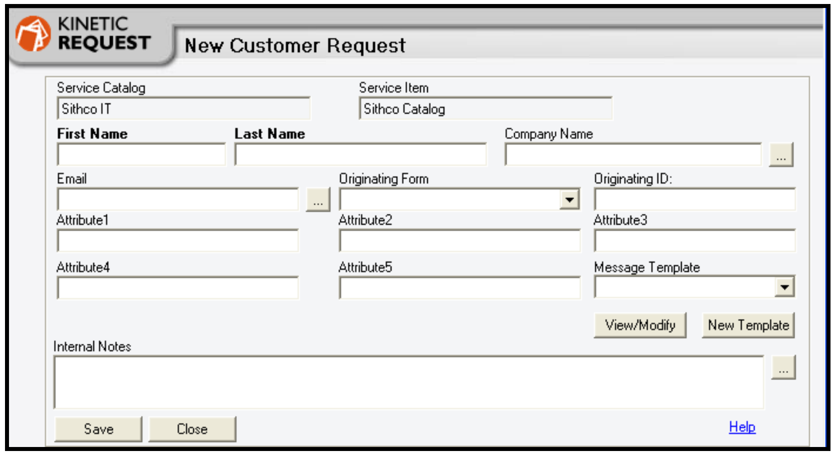


Figure 95: New Customer Request

5. Complete the fields shown in Table 9: New Submissions Screen Fields, as needed.

> **Note**: If a Message Template is not selected, a request record will be created, but the request will not be sent. The status will be "New" rather than "Sent" as it is when a request invitation is actually emailed to a participant. A warning message is displayed if a message template is not selected.

Table 9: New Submissions Screen Fields

Field Name	Description
Category Request Template Name	Automatically populates with the category and name of the request template on which you are currently working.
First Name	Request participant's first name.
Last Name	Request participant's last name.
Company Name	Request participant's company name.
E-mail	Request participant's e-mail.
Originating Form	If this request originated in another system, include the name of the system, application, or form here.
Originating ID	The ID from the originating system identified in the Originating Form field.
Attribute 1 through 5	Attributes hold information regarding your interaction with the participant for later reporting.
Message Template	The message template to use.
Internal Notes	Add such notes as participant

Field Name	Description
	follow-up information.

6. Click the **Save** button.

7. To immediately send a message to the participant, click **Send & Save**.

8. To not save, click the **Close** button.

Resending a Request to a Participant

Send or Resend a Request To Selected Participants:

1. Search for one or more request participants on the Submissions tab.

2. Highlight those recipients to send/resend to.

3. On the right side of the **Service Item Details** section, click **(Re)Send**.

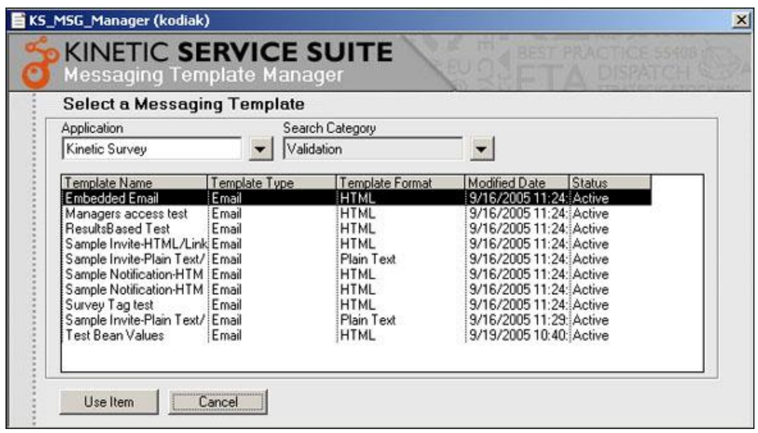


Figure 96: Send to Selected Message Template

4. A dialog opens to choose the Message Template to use for this invitation. Highlight the **Template Name**.

5. Click the **Use Item** button. The request is sent to those recipients highlighted and you return to the **Submissions** tab.

Advanced Search

The **Advanced Search** form allows you to search for a customer request using more criteria than the drop-down menu search. For example, you can search for anyone who answered any request with the name "Kelly" in the last three days.

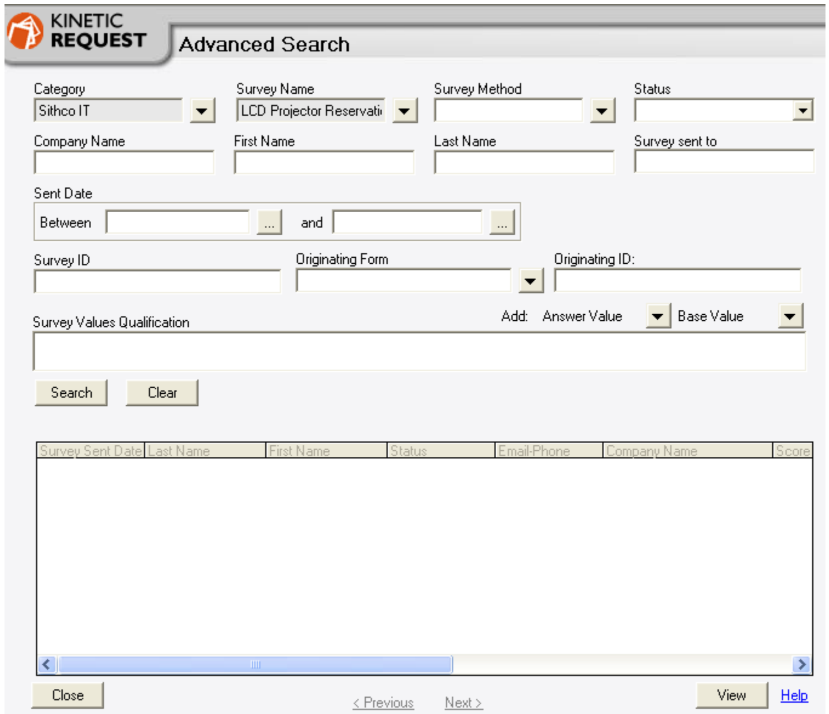


Figure 97: Advanced Search

Perform Advanced Search:

1. Access the **Request Manager**. See Accessing the Request Manager.
2. Select the **Submissions** tab.
3. From the left column, select **Advanced Search**. The **Advanced Search** form appears.
4. Select the search field information. You can fill in one or more fields to refine the search.
5. To include Request Values (answers) you can use the Request Values Qualification toinclude attributes or request answers into your qualification.
6. Click **Search** to display requests that match your criteria.

NOTE

When you access the **Advanced Search** window from the link on the left column, the **Advanced Search** starts with only the category you were currently searching on for Request Templates, if any. By accessing the **Advanced Search** form from the **Customer Requests** tab, the search includes the category and name of the request template you are working with currently.

7. From the results table you can open individual requests by Double-clicking or clicking **View**. For more information on viewing requet results, see View a Customer Request.

Open an Anonymous Request

An anonymous request is a request that is not targeted/linked to a specific person. Anonymous requests will use a URL link that includes a reference to the request template itself, rather than to a particular submission record.

Anonymous requests are useful on websites or for forms where you do not know beforehand who will be filling out the request. They are also useful for testing a request prior to sending it out to a wider audience, which may be targeted.

The Open Anonymous button is only enabled if "Allow Anonymous" is checked on the Advanced Tab of the request manager. By default all new requests have this checked to make it easier to test.

You can open an anonymous request by clicking the **Open Anonymous** link.

THE REPORTS TAB

The Reports tab allows you to choose a report and run it for the currently selected request.

Reporting is discussed in it's own chapter. See Request Reporting.

THE SOURCES TAB

IMPORTANT

Before using the Sources tab functions, your AR System Administrator must create the background workflow that allows Kinetic Request to use your originating form's data. See the *Kinetic Request Integration Manual* for more information.

Kinetic Request can be integrated to one or more forms or applications on your AR System Server. Part of this process is "linking" your forms to Kinetic Request with shared and form-specific workflow. This is performed by an AR System Administrator. Each form integrated is considered a "Data Source".

Once this process is completed, a request manager can then use these data sources to trigger requests by configuring integration points to incorporate requests into your business process. This is done via the **Sources Tab** on the Service Catalog Console

In order to view this tab, the request manager must be a part of the "Request Integrator" group.

From the **Sources tab** of the Service Catalog Console the following can be established:

TRIGGERS

- An Integration Point is a combination of a data source (an AR System form), a qualification to indicate when to trigger this request, and what type of trigger mechanism (event, batch, or active link).
- You can also set up schedules for batch-style integrations.

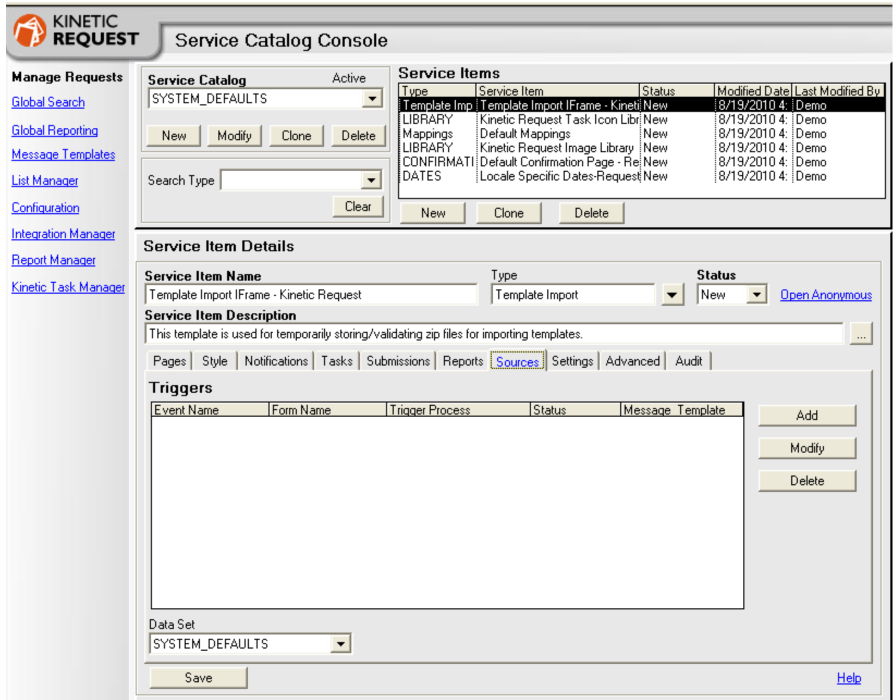


Figure 98: Sources Tab

TRIGGERS

Create, Modify or Delete Triggers:

1. Access the **Service Catalog Console**.
2. Highlight the name of the service item.
3. Select the **Sources** tab.
4. The table, **Triggers** contains integration qualifications from forms into the current request selected.
5. To create a **Trigger**, click **Add** (or click **Modify**, if you wish to change an existing integration point). The New Integration Manager dialog opens.

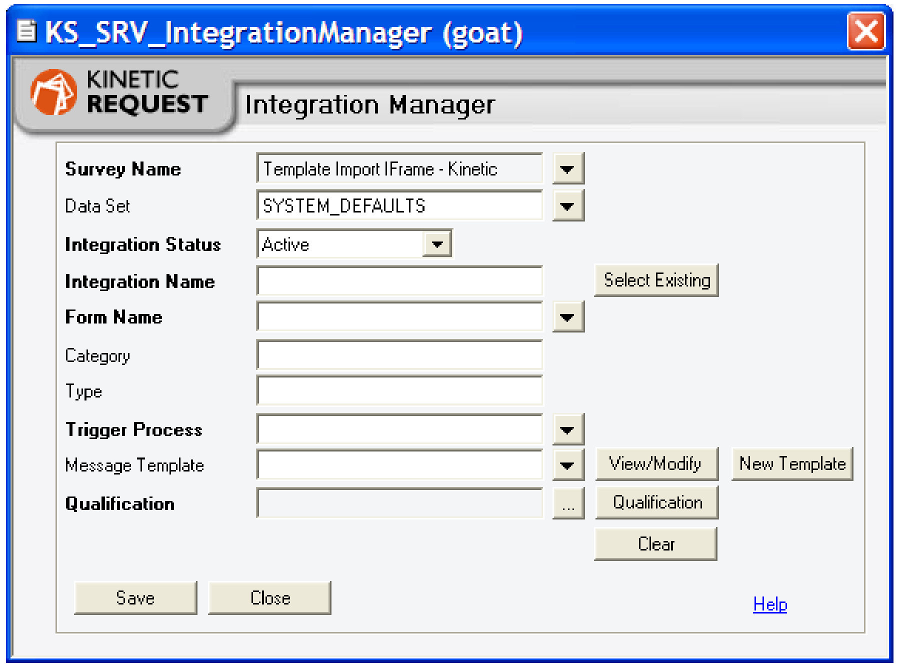


Figure 99: New Integration Point Dialog

6. Select an Integration Status:

   - **Active**--To immediately begin creating requests from your integrated form.

   -Or-

   - **Inactive**: to create the integration point but not immediately begin creating requests. You can later change the status to active once you want the integration to start populating requests.

7. Add an identifier for your integration in the **Integration Name** field.

   -Or-

8. Select an existing integration using the **Select Existing** button. This will open a new dialog listing the current integrations.

9. Select an integration on the table and click **Select.**

   The integration information will be automatically populated into the appropriate fields.

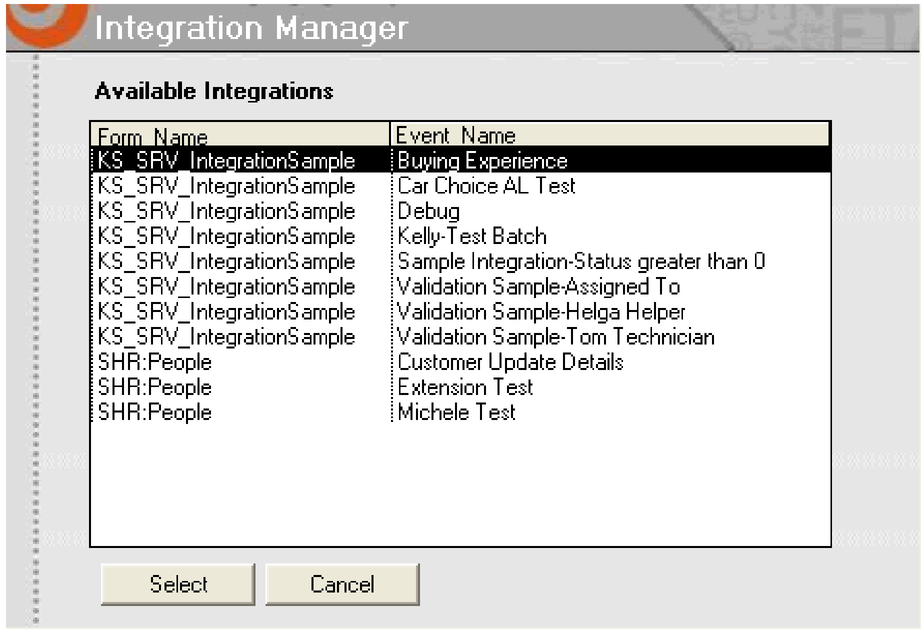


Figure 100: Available Integrations dialog

10. Select the form which will be the data source for this request by selecting a **Form Name** from the menu. The forms that are listed are those forms integrated into Kinetic Request by your AR System Administrator. See the *Kinetic Request Integration Manual* for more information.

11. Enter/Select a Category and/or Type if applicable. The Service Catalog and Type fields give you a way to segment your integrations for better performance. When your Administrator integrates Kinetic Request to another application, they may set up predetermined Service Catalog/Types and will show up as menus for you.

12. Select a trigger process.

As described earlier, trigger processes describe how a request is triggered. There are four options:

Table 10: Trigger Processes

Trigger	Description
Active Link	This type of integration will pop a request dialog for a user while in another AR System application. This type of integration is typically used for call scripting. For example: A user selects a service catalog of "Hardware" and a request with three

Trigger	Description
	Hardware specific questions opens. **Note**: Your AR System Administrator defines at what point in the user processing this qualification is checked. For example on user selection of "Service Catalog" or on Save of a record.
Event	An event trigger is an integration that fires on the creation or modification of a record, typically by a user. For example: To fire when the ticket status equals closed and the record is saved.
Batch-One Time	A batch one-time integration triggers requests to a group of people at a scheduled date and time. For example: Requesting all Remedy AR Users respond with the level of training they have.
Batch-Scheduled	Batch scheduled is an ongoing integration that triggers requests to a group of people. For example: Sending Requests to all contacts each year on a rolling 12-month basis.

NOTE

Scheduling also allows you to send a request after hours, when your server or e-mail engine might not be as busy.

Batch Integrations

1. If your Event Trigger is a batch, schedule when this batch should run.

    a. If this is a one time batch update:

        i. Select the date/time schedule field.

        ii. Select the date and time this should run.

    b. If this is a recurring batch, click **Schedule**, for the **Schedule Event** dialog displays.

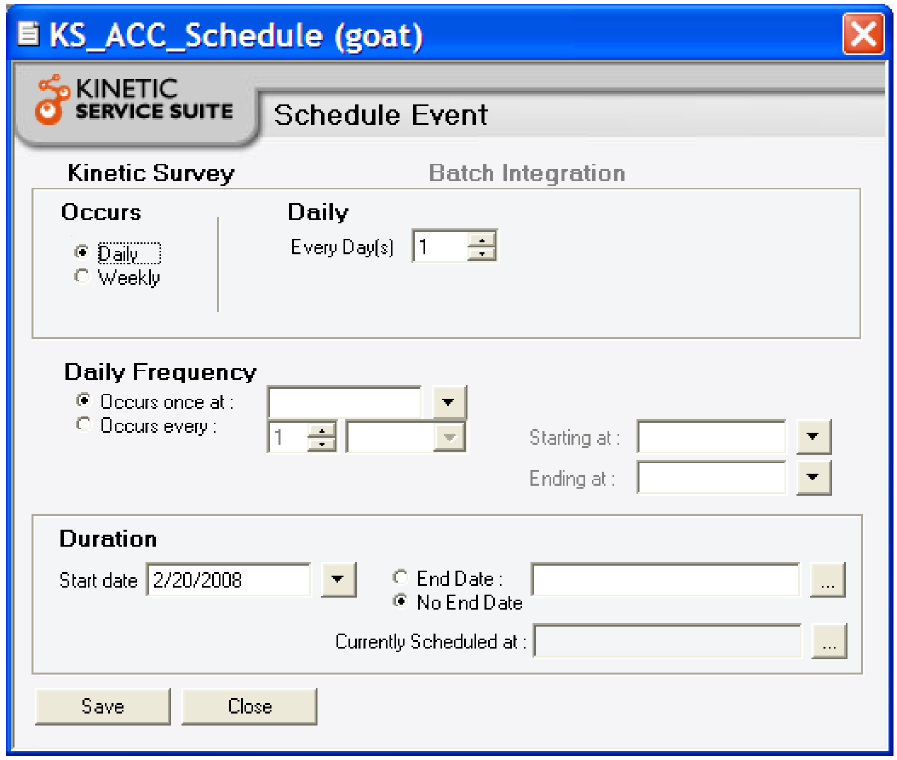


Figure 101: Schedule Event Dialog

2. Enter how often you want the batch to run using the **Occurs**, **Daily Frequency** and **Duration** sections.

3. To save the schedule, click **Save**. The dialog closes.

4. Select the **Message Template** this integration will use when inviting participants to fill out the request. If no message template is selected, catalog service items records will be created but no email messages will be sent out and the Service Item status will remain at "New".

5. You must now write a qualification that describes the trigger event that corresponds to the request you are working with. Do this by clicking the **Qualification** button (See Figure 99: New Integration Point Dialog for location).

NOTE

Keywords will include a **"\"** to conform to external qualification syntax. Use drop-down menu for keywords.

IMPORTANT

It is important to create safe qualifications that do not place undue burden on your server and jeopardize performance. This is especially true for batch requests.

As an example, if you perform a batch request against the Help Desk form and the qualification is 'Status' = "Closed", when the batch runs, every closed record would be requested, possibly creating tens of thousands or more requests.

You should use the scheduling capabilities and multiple qualifications to split up requesting large numbers of records.

NOTE

Filters use these qualifications, and therefore should use database names of fields. If there is a possibility that the field name might change, you can also use field IDs in the qualification.

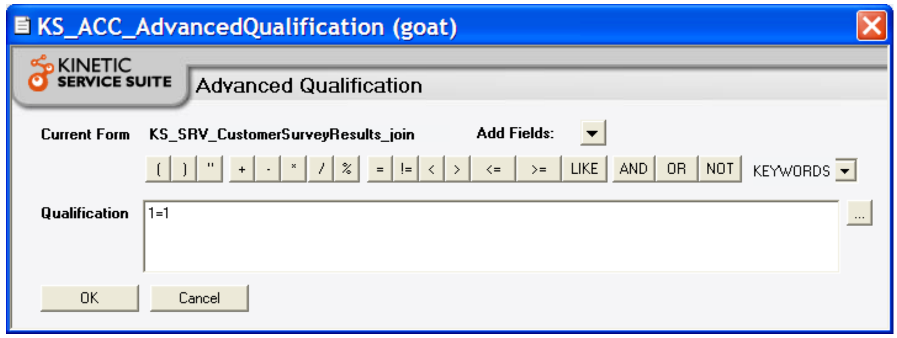


Figure 102: Advanced Qualification

The integration workflow uses this qualification to determine which requests to trigger on the particular event.

Event integrations use filters during the save of a record in the source form. Because of this, they can use the special filter qualifications such as 'TR' and 'DB' values.

Batch integrations also use filters. However, as these are not event based, you should not use 'TR' or 'DB' values.

Prior to saving a Batch integration, a check is done to see how many records would be involved when this batch is triggered. If that number exceeds the configuration value "Max Batch Requests", a warning will be displayed to the user. This warning is done to help avoid large batches of requests being triggered accidentally.

Active Link integrations use active links during the processing of a ticket, and therefore need to use active link style qualifications. Using a 'TR' value in this type of qualification will result in an error when trying to save the integration. See the following examples:

- **Example 1**—To trigger the request on the close of a case your qualification might look like this:

  `'TR.Status' = "Closed"`

- **Example 2**—To close the request and for a specific language, you might write something similar to the following example:

  `'TR.Status' = "Closed" AND 'Country' != "Mexico"`

  i. Add this qualification to your translated Spanish Request:

  ii. Add a similar qualification to your English/Default request.

- **Example 3**—If you are doing batch contact data validation requests, you can structure your qualification differently. You might split up and do only a portion of your contacts each month. You could structure your qualification similar to:

  ```
  'Last Name' LIKE "A%" OR 'Last Name' LIKE "B%"
  ```

  You would schedule this annually, for example each January.

  You could then do a February scheduled batch update similar to:

  ```
  'Last Name' LIKE "C%" OR 'Last Name' LIKE "D%" OR
  'Last Name' LIKE "E%"
  ```

6. From the **Add Fields** pulldown menu, select the field or fields.

7. In the **Qualification field**, add any modificaton by clicking the buttons or typing.

8. Click Add Fields.

9. To save, click **OK**.

   –Or–

   To cancel without saving, click **Cancel**.

10. If you are done, and do not want to add any Integration Rules, Click **Save**. Otherwise continue to the next section, if you have saved the integration point, your integration appears in the **Integration Points** table.

DATA SETS

A **Data Set** is a pre-configured set of labels that are used to better identify the data that is pushed into Kinetic Request.

Kinetic Request includes a set of 64 generic "attribute" fields. These fields are used to store data that you may want to use to personalize emails (such as first/last name), include in the header of your request (such as issue description, date of interaction) or for reporting (such as assigned agent, direct report, employee ID).

Your AR System administrator decides what information to push into Kinetic Request when integrating a form or data from another application and therefore the definition of the data set. By using data sets, similar requests can have a similar "backbone" of information that can be reported on in a similar fashion.

Many of the menus you see when creating a request use the data set labels. Particularly those used to create qualifications when setting defaults or dynamic lists, when creating message templates and for reporting.

By default, each request uses the "SYSTEM_DEFAULTS" data set.

For more information see Integration Manager

Setting a Data Set

1. Access the Request Manager.
2. Highlight the name of the item you want to work with..
3. Select the **Integration** tab.
4. Select an item from the menu in the **Data Set** field.

THE SETTINGS TAB

Request expiration dates and other configurable attributes of your template are created under the **Settings Tab**. These settings are optional (for instance, your request does not have to expire).

Examples of attributes that an organization may want to include on a request are version, owner, business unit involved, the priority in which they appear on the Service Catalog page, and many others.

EXPIRATION DAYS SETTING

To enhance the ability to receive completed requests in a timely manner you may set an expiration value for your requests that are sent to customers. The default time for expiration days is 30. If your user tries to submit a request after the configured days, a message will be sent to them stating that the request has expired.

Note: Only requests sent after this value is set will receive an expiration date. Requests already sent will not be affected. If a request is "re-sent" the expiration date will be reset, as well.

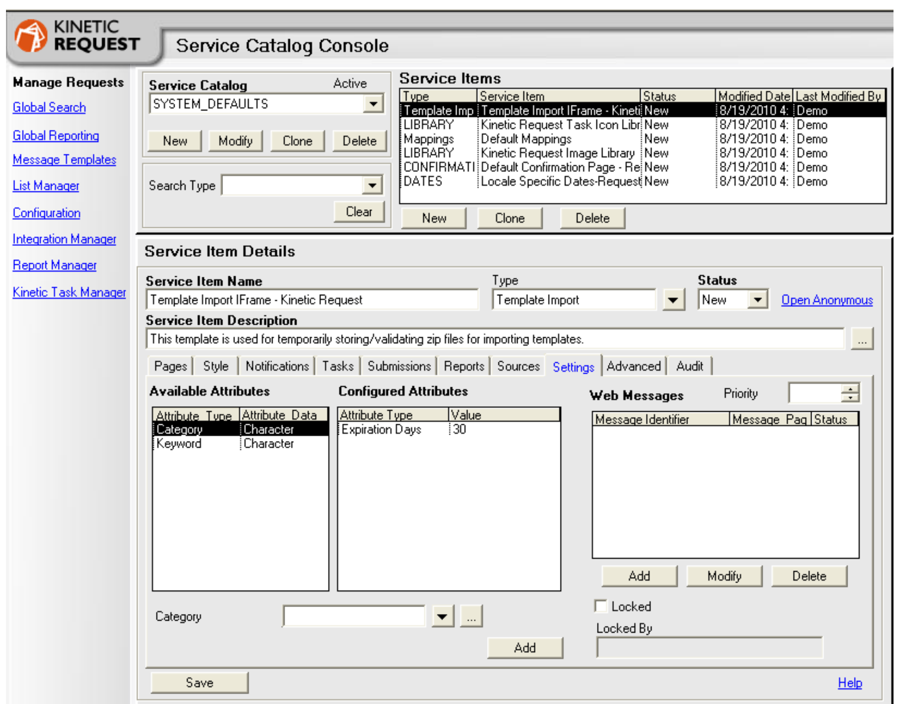


Figure 103: Settings Tab

ADD, MODIFY AND DELETE EXPIRATION DATE

1. Select the "**Expiration Date**" Attribute Type from the **Available Attributes** table.

2. Set the number of days desired (default is 30).

3. Click **Add**. As shown in the following figure, the Attribute Type **Expiration Days** shifts to the **Configured Attributes** field and reflects the value entered.

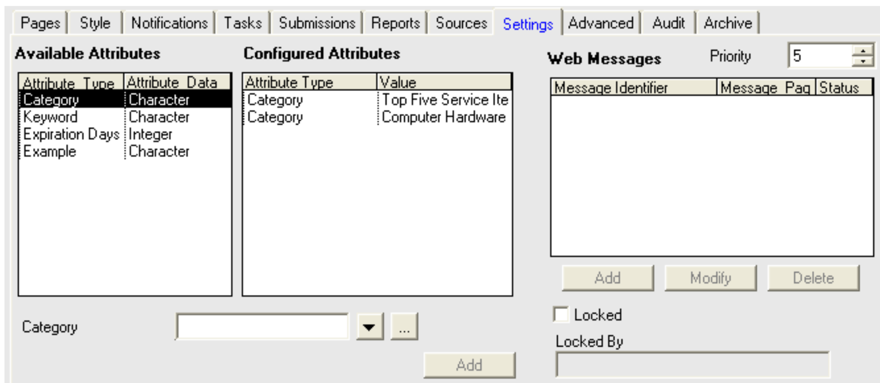


Figure 104: Modifying Expiration Days

4. To **modify** the Expiration Days, click or highlight the Attribute Type/Value from the Configured Attributes field.

5. Click the cursor inside Expiration Days window and type a new number (integer). This reflects the timeframe in which the request is to be completed.

6. Click **Modify.** The information is stored.

7. To **delete** Expiration Days, click (highlight) the the Attribute Type from the Configuration Attributes field and click **Delete**.

The Attribute now shows up in the left "Available Attributes" table.

SETTING UP OTHER ATTRIBUTE TYPES

Your administrator can set up new attributes types that can apply to a specific category or the entire application. Once created, they will show up in the "**Available Attributes**" table like "Expiration Days."

Attributes can be numeric, dates, attachments and text and can include validation.

Creating, Modifying and Deleting these attributes will follow the same process as Expiration Days.

SETTING A PRIORITY FOR VIEWING ITEMS

In order to help manage extensive lists of Service Items, the **Priority** field offers the ability to "order" Service Items and have only a few appear to your customer. Priorities can be set for any number such as; 3, 5, 10, or 40. Plan to leave space for switching and adding, as the Service Catalog changes.

Example: An organization could offer a Service Catalog with hardware and software services. Each category offers many service items. The Priority function allows a user to choose the top number of "priority" items to be viewed by a customer. The remainder could then be viewed as a full page (or pages), after clicking "More" or "View Complete List."

WEB MESSAGES

Web Messages that are specific to a particular request can be created, modified and deleted under the **Settings Tab**. By default, these messages are in English. Many will include a reference to a particular e-mail support address, or to issues surrounding submission.

It is important to note that they will override those "default" types of web messages created from **Configuration.**

Example: If a different support address is needed for a particular request, or if a different language is required for a specific request, it would be created from the **Settings Tab**.

For "default" types of web messages, please see the section entitled

Web Messages Tab under **Configuration.**

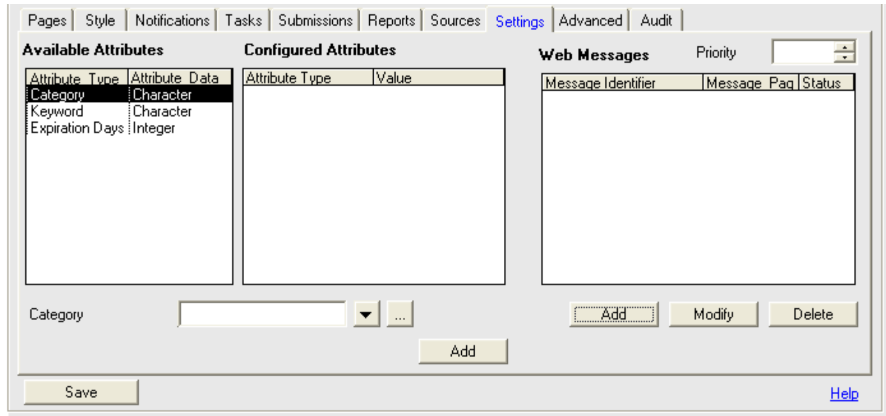


Figure 105: Web Messages from Settings Tab

To Add a Web Messages

1. Click the **Add** button. The **Web User Message** screen appears.

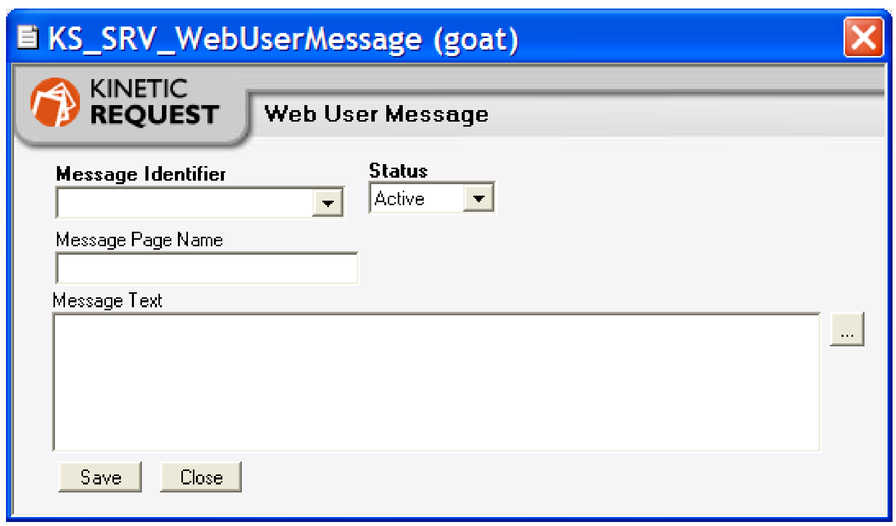


Figure 106: Web User Message

2. Choose a **Message Identifier** from the drop-down menu; **Generic Error, Request Instance Closed, Request Not Found** or **Request Template Closed**

3. Choose a **Status** from the drop-down menu; **Active, Inactive, Deleted (clear).**

4. Type in the **Message Page Name.**

5. Type in the "actual" **Message Text.** This is the message that will display to the user if they encounter the scenario indicated in the "Message Identifier" such as "Template Closed".

6. Click **Save** and **Close.**

To Modify or Delete a Web Message

1. Click to highlight a Web Message.

2. Click **Modify** or **Delete**. If Modifying a web message, make the necessary changes.

3. Click on **Save** and **Close**.

Lock a Service Item

If you need to stop other Request Managers from altering a service item, check the **Locked** check box and save the template. Your name (from the User form) will be placed into the **Locked By** field. If you want to unlock the service item, uncheck the **Locked** checkbox while logged in as the user who locked it.

The Advanced Tab

Use the functions on this tab to further format and control your request in the following ways:

- Override the default web server URL
- Change the request context ("/kinetic_request/" if request web component is installed alongside mid-tier, null if in standalone mode).
- Override the default JSP page.
- Attach a style sheet, so that the request is formatted according to your specifications.
- Set Custom Header Content
- Set a Display Name

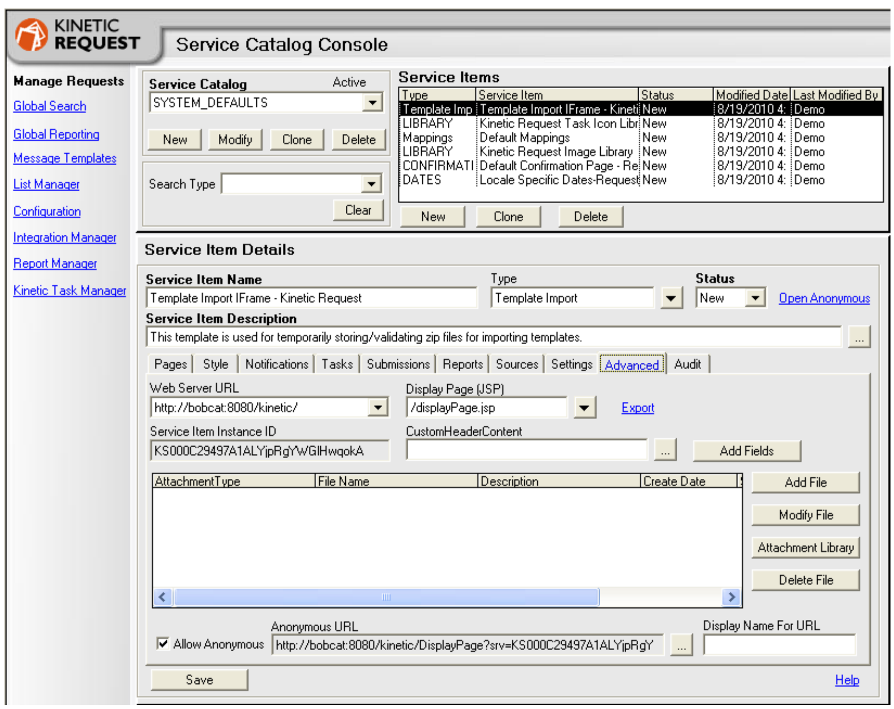


Figure 107: Advanced tab/Request Manager Console

Modify Advanced Tab Functions:

1. Access the **Service Catalog Console**.
2. Highlight the name of the service item.

3. Select the **Advanced** tab.

4. Modify the fields in Table 11: Advanced Tab Fields, as needed.

Table 11: Advanced Tab Fields

Field Name	Description
Web Server URL	Type or select the Uniform Resource Locator (URL), the address that defines the route to a file on a Web server. Kinetic Request automatically retrieves this from the *Configuration Values*.
Custom Header Content	Add Customer Header Content into your template, such as a link to an external style sheet, your own "other style" information, java script functions, and meta tags. Anything entered here will be included between the <head> tags in the HTML document and must be HTML compliant syntax. You can use the **Add Fields** button to add answers or attributes for use in custom JavaScript or other html, just like adding fields to a text element.
Display Page (JSP)	The display page is the JSP page that "wraps" your request. It includes java script, links to style sheets, and other information your request needs to function. This is set automatically based on a configuration value. You can over ride the default .jsp file with your own customized .jsp page. This should be done only be very advanced users.
Display Name for URL	A URL alias for the request. You can use this in place of an anonymous request instance ID, within the URL. For example: `http://mycompany.com/arsys/servlet/DisplayRequest?name=myRequest` The name cannot include spaces or illegal characters for a URL. In addition, the name of the request must be unique. There can be no other active requests with the same name. **Note:** Display names are useful for updating existing requests when you might have other external links to them. You could clone a request, make the original request inactive,

Field Name	Description
	and the new request active, while keeping the same Display Name. External links do not need to be updated, they automatically point to the new request.
Allow Anonymous	By checking this box, the request can be accessed from an anonymous context. By default, new requests have this box checked.
Anonymous URL	This read only field includes the URL for anonymous requests (if available).

5. To futher customize your request, files can be added from the **Advanced** tab. The files listed in the table are the same list of files seen when adding an image element.

> **Note:** The **Export** button is for Administrators Only. See **Configuration** for further details.

Table 12: Files Types Available for Adding to Your Request

Available File Types	Description
Background Image	By adding a background image, this image will be tiled on the background of your request.
Image	Images can be used within your request. Typically images are added from the Pages tab, by adding an image element.
Stylesheet	Attach a cascading style sheet (CSS) to further control the elements in your request. See Cascading Style Sheets for a list of CSS classes that can be used.
File	Any file type that you need to be associated with the service item. For example, a pdf that explains one of the question choices. This file will be exported with the service item.

THE AUDIT TAB

The Audit tab allows a request manager to see changes that have taken place for this request. Changes that are audited include:

- Template item changes, once the status is "Active". Changes in "New" status are considered in development and are not audited.
- Deletions of customer requests
- Questions and question changes
- Integration changes

The actual information on the change that is tracked include:

- User making the change
- Data/time of the change
- Previous value
- Value changed to

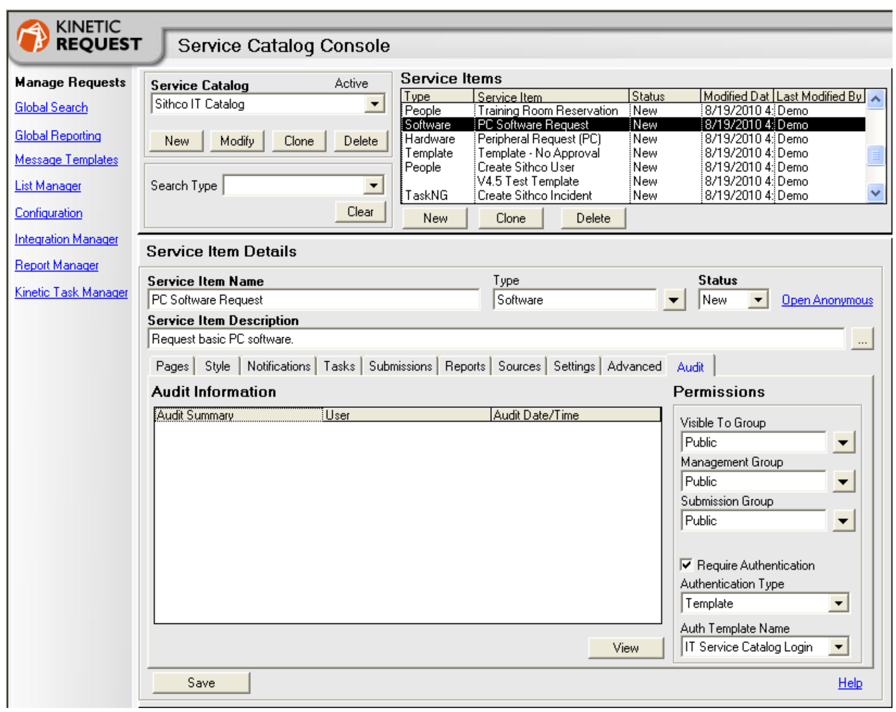


Figure 108: Audit Tab

View More Detail on Audited Change

1. Click on the **Audit** tab of a service item.
2. Select an item from the **Audit Information** table.
3. Click **View**. The audit detail opens.

Note: Audit detail information is not changeable.

Permissions

If you need to restrict the Remedy Users that can submit a request, see the answers to a request, and/or control who can modify a service item, those options are here. All of these are controlled by setting Remedy Permissions which are then applied to the correct underlying forms.

Visible to Group – This will limit users that can access the service item from the Launcher, as long as they have to authenticate to get to the launcher. Authentication allows the application to inspect and control access by user by Remedy permission group. You may add multiple groups to this list

Management Group – This single group will have access to view and modify a service item. If you set this to a group besides public, even a Remedy Administrator will not have permissions to see the service item.

Submission Group – This single group will be the only group that has permission to see the answers, attributes, and base records for submitted requests.

Authentication

Authentication in Kinetic Request requires a user to login against Remedy before accessing the selected service item. If you make your customers authenticate, you have access to their Login ID for use with events and dynamic defaults with the $USER$ keyword.

To enable authentication, check the box next to **Require Authentication**. This un-hides the drop-down list **Authentication Type**.

The following options are available:

- **Default** – uses the default Kinetic Request login page

- **Template** – Un-hides the **Auth Template Name** drop-down list. This list shows all the available sevice items that could be used as an authentication page (must have the Type – Launcher).

- **External** – This type is for use with single sign-on (SSO). When you select External, the field Authentication URL un-hides, and you enter the URL that is used to access your own SSO application. A sample of code for constructing your own SSO is included in the documentation of the application whae downloaded from the Kinetic Data website.

ARCHIVING TAB

Kinetic Request allows the ability to archive submitted request data using Remedy's built in archiving functionality. Archiving is controlled at the individual service item level so you can set different qualifications for each one.

SETTING UP THE FORMS

Archiving is not enabled for Kinetic Request by default because it is an optional feature that not all customers will use. In order to enable archiving, specific forms need to be modified using the Remedy Administrator tool. Use the following instructions to complete these modifications. ***These steps should only be performed by a Remedy Administrator***.

1. Open the form KS_SRV_CustomerSurvey_base in your Remedy Administrator tool.

2. Select Form -> Form Properties from the menu bar.

3. Select the Archiving tab of the Form Properties dialog window.

4. Select an 'Archive Type' depending on your business rules.

5. Enter KS_ARCH_SRV_CustomerSurvey_base into the 'Archive to Form' field. If you do not wish to archive attachments or diary fields, check the appropriate option.

6. Set the time criteria for when you wish the actual archiving of records to occur. It is recommended that this be done during non-peak operating hours.

7. Enter '_ArchiveMe' = "ArchiveMe" in the qualification field.

8. Repeat steps 1 through 7 for the following base forms replacing the Archive Form name with the one listed here.

Table 14: Archiving Forms

Base Form	**Archive Form Name**
KS_ACC_Attachment	KS_ARCH_ACC_Attachment

KS_ACC_Audit	KS_ARCH_ACC_Audit
KS_MSG_Message	KS_ARCH_MSG_Message
KS_RQT_Task	KS_ARCH_RQT_Task
KS_SRV_SurveyAnswer	KS_ARCH_SRV_SurveyAnswer
KS_SRV_SurveyResult	KS_ARCH_SRV_SurveyResult

Viewing the Archive Tab

Each template has its archiving settings displayed on the Archive tab of the Service Catalog Console, which is hidden by default. In order to view this tab you must set the Configuration Setting labeled Display Archive to "Yes".

The Archive Tab

Kinetic Request uses Remedy's out of the box functionality to allow for the archiving of submitted requests. Archiving of request data is done at the individual service item level so that each service item controls when its data is archived.

The archive tab is used to configure archiving as well as provide a quick way to see how many submissions for the selected survey have been archived and when the last time the archive process ran for the survey.

Service Item Controlled vs. Externally Controlled

Determining when data from a submitted request is archived can be done either by the service item itself or by an external application such as Remedy's Change Management.

If the service item is used to determine when the archiving is done you will need to provide a qualification using data from the submission. An example of this would be if you wanted the data archived after the request has been completed for 90 days.

Externally controlled archiving requires workflow to be written on the external application that sets the '_ArchiveMe' flag on the appropriate KS_SRV_CustomerSurvey_base record. This sets the record as ready to be archived. An example of this would be if you wanted all requests associated with a change ticket to be archived when the change ticket itself is archived.

Configuring Archiving

4. Open the Service Catalog Console and select the appropriate Service Item from the table.

5. Click on the Archive tab.

6. Select the Archive Method:
   - **Off** – Archiving will not be configured for this survey
   - **Service Item Controlled** – Records will be archived using rules defined by the request itself.
   - **Externally Controlled** – An application other than Request determines when records are archived.

7. Enter Notes (Optional) – Enter any notes/comments that help describe the current archive process.

8. Archive Qualification (Service Item Controlled Only) – Click the Build Qualification button to open the Advanced Qualification dialog. This qualification will determine when a record should be archived. An example would be when the submission has been completed for at least 90 days ("('SurveyCompletedDate' + 7776000) > $\TIMESTAMP$").

9. Archive Form (Service Item Controlled Only) – By default this should be set to KS_ARCH_SRV_CustomerSurvey_base unless your system was configured to use a different form for archiving. If so, select this appropriate archive form from the menu.

10. Save the template.

Chapter 5 MANAGE REQUESTS

On the left side of the Service Catalog Console are a number of links to help manage your requests. While other areas in which you have been working are applicable to specific requests, these links are global and apply to all service catalogs.

Not all of the links will be available to all Request users depending on their permissions.

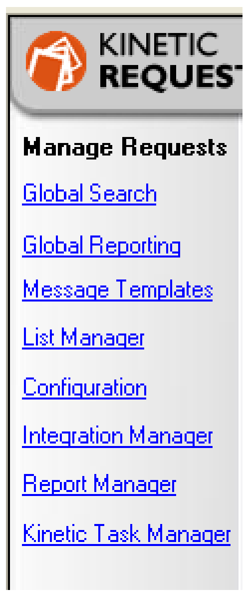


Figure 109: Manage Requests Menu Hyperlinks

Global Search

Like Advanced Search functionality on the Customer Surveys tab, the Global Search link takes you to the Advanced Search dialog. However, from here, Request Managers Inspectors can search for customer requests *across* service items.

For more information, see Advanced Search.

Global Reporting

Like Advanced Reporting on the Reporting tab, the Global Reporting link takes you to the Advanced Report dialog. However, from here you can select reports and qualifications to run *across* service items.

For more information, see Advanced Report Console

MESSAGE TEMPLATES

The **Message Templates** console allows you to create and manage the format of your email messages. In addition to conventional text and HTML markup, these message templates allow you to insert field placeholders that populate when a request uses that template.

For Kinetic Request, email messages are typically three types:

- Request Invitations: Email messages with a link to a request to be completed by the recipient (these can be either anonymous or targeted and include reminders).
- Embedded Requests: Requests where the initial page of the request is embedded in the email. These must be HTML formatted requests.
- Request Notifications: Email messages that are sent following the submission of a request. These would include escalations to managers when a request needs attention and thank you's to request participants.

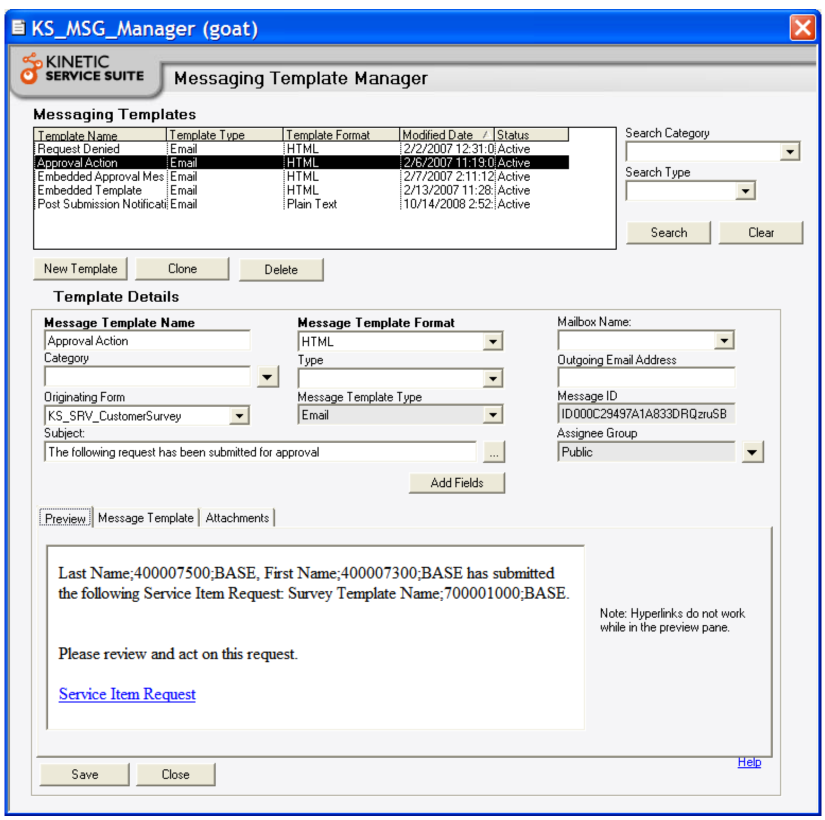


Figure 110: Message Template Manager

When the Messaging Template Manager opens, the Search Category field is automatically selected using the Service Catalog that was last viewed.

Search for Message Template

1. Select a category in the **Search Category** field. The Messaging Templates table will populate with any message templates matching that category. If no message templates match a category, the message fields will be blank and read-only.

2. Select a type in the **Search Type** field. This field is optional

-OR-

3. Select **Clear** to view all message templates within all categories (that the user has permissions to view).

Create, Clone or Edit a Message Template

1. To create a new message template, click **New Template**.

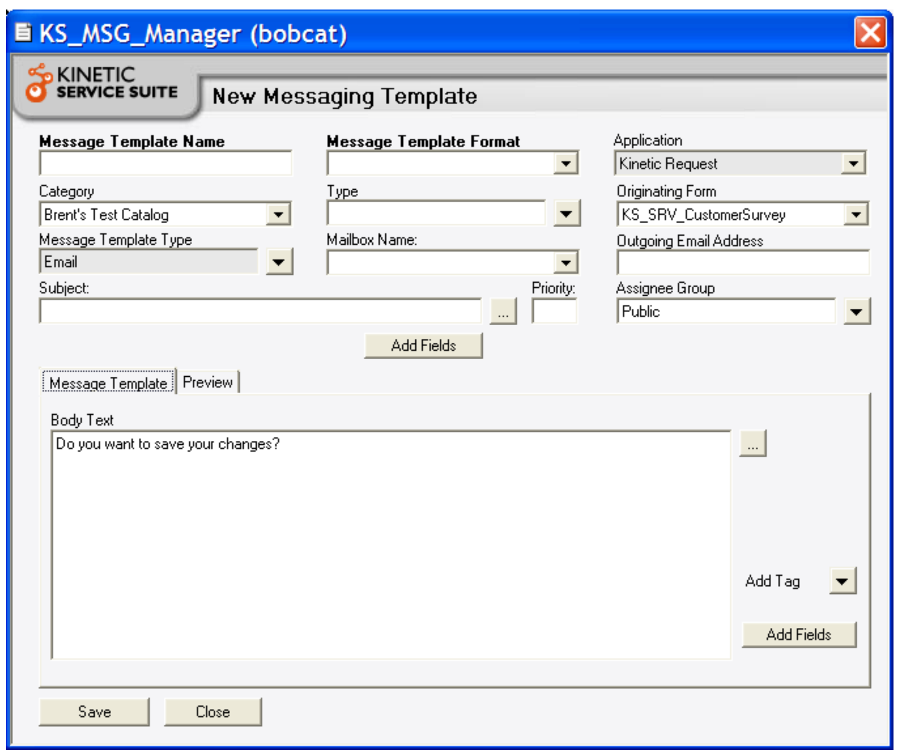


Figure 111: New Messaging Template

2. Enter a **Message Template Name**, create a name with some meaning that is easily recognizable (required).

3. From the **Message Template Format** drop-down list box select either HTML or Plain Text. If you will be doing embedded requests, this must be HTML (required).

4. The **Category** field automatically populates with the last category you searched for. Use this category, select another category, or leave the field blank. Message templates with a category will only be visible to requests of the same category. If you want the message template to be available from multiple service catalogs, then leave this blank.

5. From the **Type** field drop-down list make a selection or add a new type. Types are optional and only needed if you want to further categorize your message templates for easier searching later.

6. The **Originating Form** field pre-populates or select one from the drop-down list. The menu on this field helps you determine which form to use.

   Post-Survey Notification: KS_SRV_CustomerSurveyResults_join
   Pre-Survey Invite: KS_SRV_CustomerSurvey

7. **Mailbox Name** is a list of all the outgoing mailboxes setup in your Remedy email engine. If no value is selected, the default outgoing mailbox is used.

8. By default the **Outgoing Email Address** field uses the outgoing email address of the Mailbox. However, users can specify their own email address and override the default for this message template.

9. Type a descriptive phrase for the email **Subject** field. This will show in the subject line of the email.

   Use the **Add Fields** button to add answers or attributes from requests. However, there is limit of 255 characters on the field, so be cautious what fields you add. The add fields action is the same as the **Body** section.

10. If you would like to enter a specific **priority**, enter a number in the **Priority** field.

Here are examples of Priorities as the relate to Microsoft Outlook

Table 15: Email Priority

Email Engine Priority	Microsoft Outlook Priority
0	Normal
1	High Importance
2	High Importance
3	Normal (default)
4…..100	Low Importance

11. In the **Body Text** field, type the text you want to appear in the body of the email. If your message format is HTML, you can use any standard HTML markup within you're the body of the email.

12. You can use special tags to include special text within your survey. Use the Add Tag menu to include one or more of the following tags.

    - **Anonymous Link:** For a request invite, this will include an anonymous URL.

    - **Targeted Link:** For a request invite, this will include a targeted URL (specific to a single recipient).

    - **Embed Link:** This will embed the first page of your request into the email. Any subsequent pages (content or confirmation) will be displayed in a web browser. A person filling out an embedded request must have a network connection that can reach your Kinetic request web server. Embedded requests are limited in their functionality due to security limitations in email clients (see Important Note).

    - **Opt Out Link:** This will embed a link to a special request that a user can click on to opt out of future request invites.

    - **Submitted Link:** For post- request notifications, this will embed a link into the email to open the completed request in a web browser. This link uses the AR System Midtier application to display a Kinetic Request form to display the

IMPORTANT NOTE

For Embedded Email Requests: Many email clients will not allow JavaScript or other advanced HTML features. Because Kinetic Request uses web technologies, some functionality such as branching and required questions will not work for all clients. Therefore, embedded requests should typically be simple forms.

results. For security reasons, users wil be asked to login prior to seeing the results and must have Kinetic request Inspector priveledges.

Figure 112: Add Tag List

13. The **Preview** Tab offers aview of what the rendered HTML will look like to a recipient. This message is only viewable for HTML formatted emails.

14. You can also add field place holders to your request such as the recipients name and other information by selecting the **Add Fields** button. See **Error! Reference source not found.** section

15. Click the **Save** button.

Add Fields

You can personalize the message by adding variable fields. For example, an email can be personalized with the participant's first name. Any field used on the request is a potential personalized variable, such as Create Date, Score, Attribute 1, and so on. Anonymous survey invites should not use field placeholders.

1. To edit an existing message, click the **Add Fields** button. The **Add Fields** dialog displays.

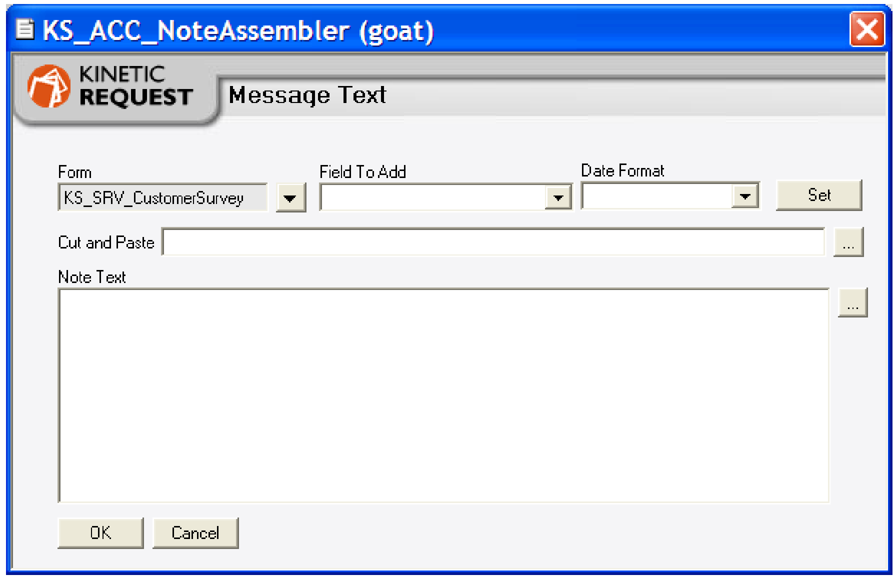


Figure 113: Add Fields Dialog

2. The **Form** field autopopulates.

3. If you are designing a Pre-Survey Invite, in the **Field to Add** field make a selection from the drop-down list. As message templates can apply to more than one request, the available Data Sets will be displayed on the first tier of the menu and the fields associated with that data set on the second tier of the menu.

IMPORTANT NOTE

Use caution when modifying existing message templates. When editing an existing message template used by other surveys, the changes appear on all the requests that use this message template. Kinetic Data recommends using the clone message template feature, edit the clone, and re-name the cloned message template.

4. --OR--

5. If you are designing a Post-Survey Notification, You will have both Base values and Answers available from the **Field to Add** drop down list.

6. If your field is a Remedy Date/Time field, in the **Date Format** field make a selection from the drop-down list.

7. Click the **Set** button and your selections displays in the **Cut and Paste** field. Then you can 'cut and paste the value into the desired location in your **Note** Text field.

8. Enter your other information in the **Note Text** field.

9. Click the **OK** button.

Attachments Tab

Attachments can be included within your message template.

Note: Large attachments should not be included within email messages.

1. Click on the Attachments tab to display the Attachment portion of the **Message Template** screen.

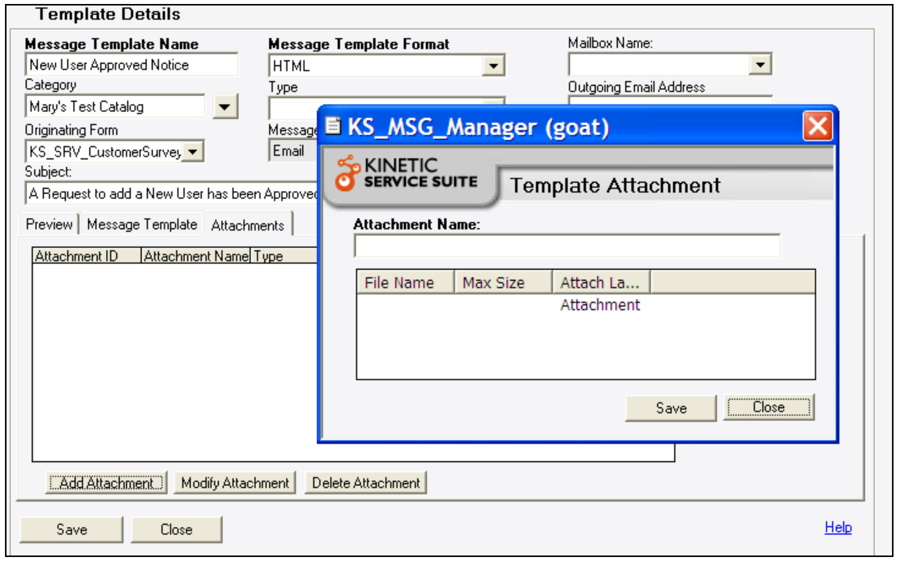


Figure 114: Attachments Tab and Dialog

2. Click **Add Attachment** and the **Template Attachment** dialog displays.

3. Enter an **Attachment Name** and select the file to be attached from the attachment field.

4. Click the **Save** button. The attachment will appear in the attachments table.

5. You can also modify or delete the attachment selected by highlighting the attachment and clicking on the **Modify Attachment** button or the **Delete Attachment** button.

Clone a Template

1. Click the **Clone** button on the main **Message Template** screen.

2. An identical message displays in a new window.

3. Click the **Save** button to save out the cloned messageList Manager

LIST MANAGER

The List Manager is used for grouping people who may be recipients of one or more requests. The List Manager is particularly useful for:

- Groups of people who are not otherwise held in your AR System Server
- Groups who are surveyed repeatedly
- Groups of people who will test your request
- Groups you would like to create based on request results for future requests

Clicking **List Manager** from the Service Catalog Console displays the **List Manager Console** screen.

NEW LISTS

You can create lists in three ways:

- A new list as a subset on another list
- A new list from request results
- A new simple list whose members are added manually

CREATING A NEW LIST

1. Select **Manage by:** "List" if it isn't already selected.
2. Click on New List
3. A dialog will open asking what type of list to create.

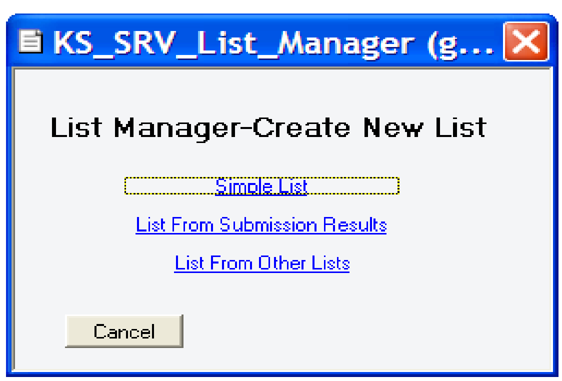


Figure 115: New List dialog

The following sub-sections will detail each list type.

SIMPLE LIST

1. Clicking on *Simple List* from the New List dialog will bring you to the List Name dialog.

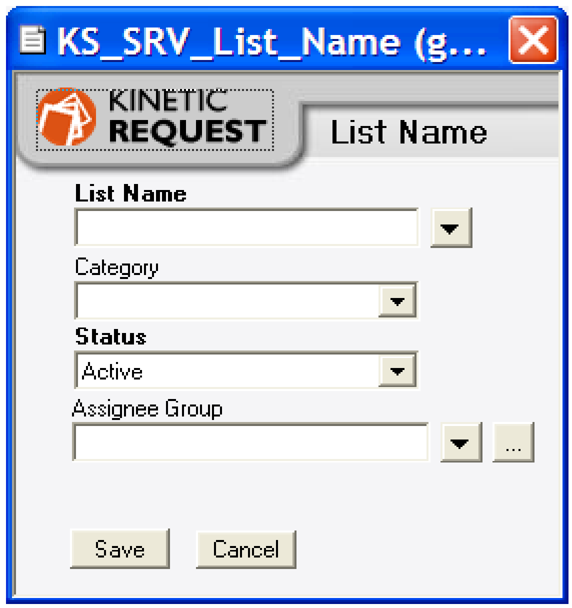


Figure 116: List Name dialog

2. Type in a new **List Name**.

3. Select a **Category** if applicable. Categories are not mandatory. Categories in the menu correspond to categories created for requests.

4. Select a **Status** if needed. By default, the Status is Active.

5. Select an **Assignee Group**. By selecting an assignee group, only those people (Request Managers) who belong to that group will be able to see your list.

6. **Save** the list.

   This list will now appear in your "Lists" menu, and you can add members to this list. See **Error! Reference source not found.**.

List from Submission Results

You can view results from a request and generate a new list from those results. Example: You have a list that asks demographic information such as job role. From that request, you may make new lists of people for each job role such as technicians, managers, executives, etc.

1. Clicking on *List From Submission Results* from the New List dialog will bring you to the Dynamic List Creation dialog.

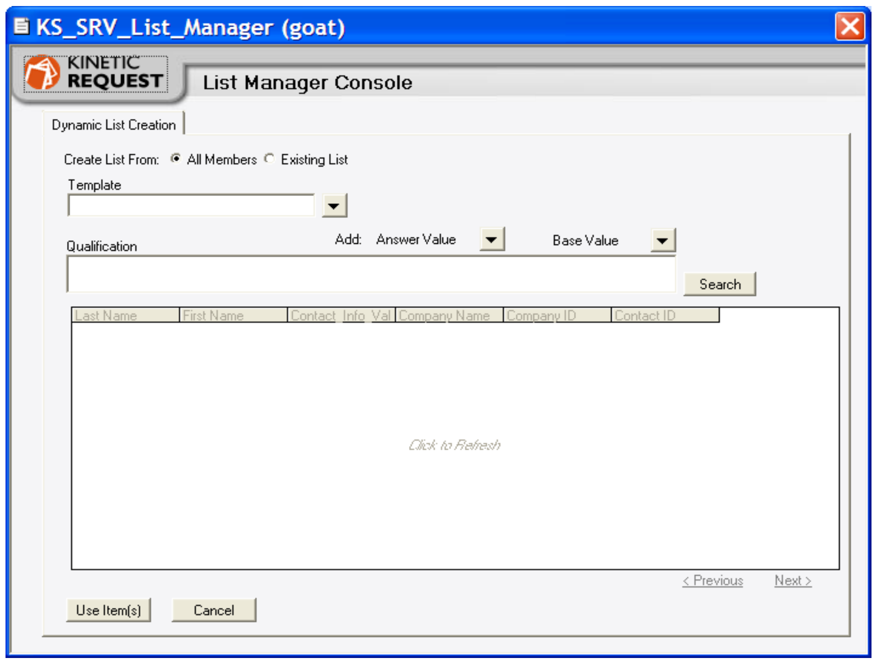


Figure 117: List Name dialog

2. Select an item to **Create List From:**

   - **All Members:** This will select all request respondents that match the qualification you build

   - **Existing List:** This will select only respondents that match the qualification you build AND are a part of an existing list that you specify via the **List Name** field and menu.

3. Select a **Template** to pull results from from the menu.

4. Create a **Qualification**. You can select Answer Values or Request Base values (attributes of the respondent). The qualification is a Remedy External qualification and needs to be formatted as such.

5. Click Search. All respondents matching the qualification (and list if specified) will be displayed.

> **Note:** Only request respondents with a value in the Contact Info Value field will be shown. This is typically an email or phone number and is used for the identifier for the contact.

6. Select one or more respondents that match your qualificiation from the **Respondents table** that you want to include in your new list.

7. Click **Use Item(s).** The New List dialog appears (see **Error! Reference source not found.**).

8. Fill in the appropriate fields for your new list, and click **Save**.

9. Your new list is created with the respondents you selected attached to this list.

List from Other Lists

You can create lists as a subset of another existing list. You may have a list that is all of your contacts, and then subset other lists by department or other information.

1. Clicking on *List From Other Lists* from the New List dialog will bring you to the Create New List dialog.

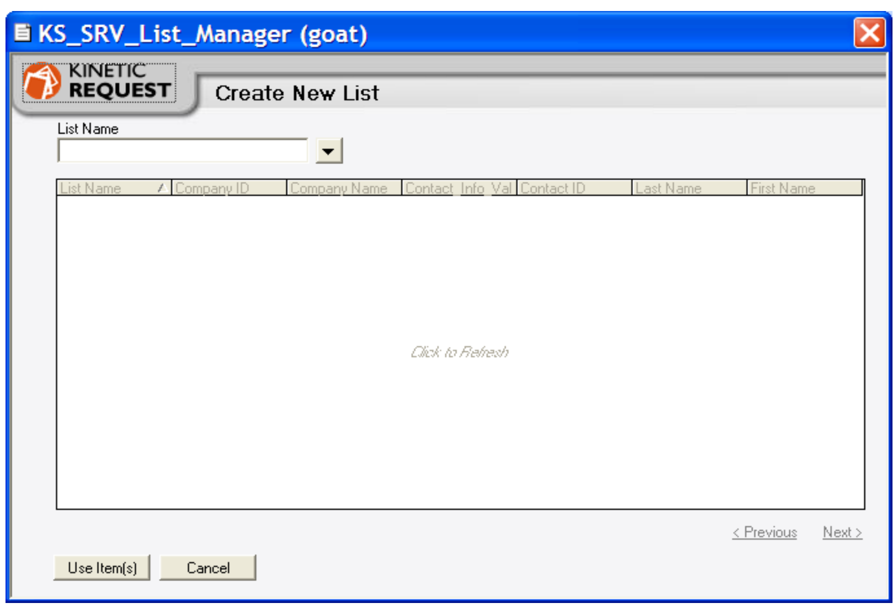


Figure 118: New List from an Existing List

2. Select an existing list from the **List Name** menu. The members of the list appear in the table.

3. Select one or more members from the existing list to add to your new list by highlighting them in the **members table**.

4. Click **Use Item(s).** The New List dialog appears (see **Error! Reference source not found.**).

5. Fill in the appropriate fields for your new list, and click **Save**.

6. Your new list is created with the respondents you selected attached to this list.

MODIFYING/DELETING LISTS

Use the Modify List and Delete List buttons below the **List Name** field to modify or delete a selected list.

SEND REQUEST TO AN ENTIRE LIST

You can easily send a request to an entire list.

1. Select **Manage By:** "List" at the top of the List Manager Console if it isn't already selected.

2. Select a list to send a request to from the **List Name** menu.

3. Click on the **Send** button below the List Name field.

> **Note**: The **Send Template to Member** button below the members list table sends a survey to ONLY those members selected

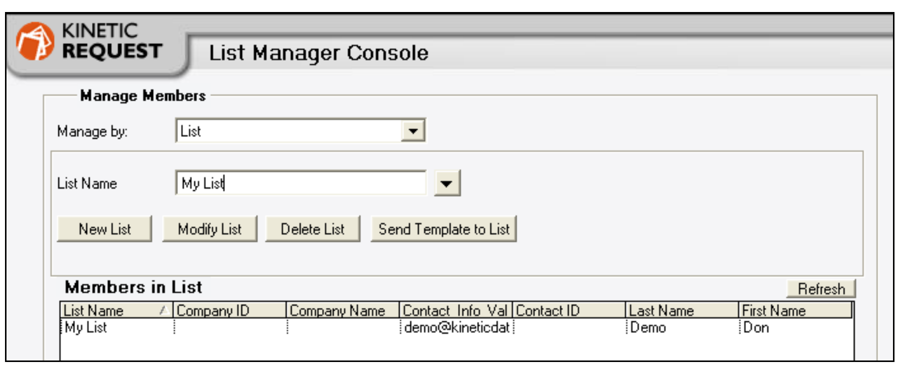


Figure 119: Send Survey

4. A dialog will appear. Search for the template you want to send to the list by selecting a Category, Type and/or Status.

5. Highlight the message desired, and click **Use Template.**

Note: At this point, request records will be created for your list for the specified service item.

6. The Message Template dialog appears. Select the Message Template to invite participants to the request by selecting the message template in the table.

Note: The Category of the List is automatically entered in the **Search Category** field and will only show message templates under that Category, or whose category is unspecified.

Before sending a survey from the List Manager, Kinetic Survey checks the number of surveys that will be created from this action. If that number exceeds the configuration value "Max Batch Surveys", a warning will be displayed to the user.

7. Select **Use Item** to use the message template selected.

Note: If you want to create survey records for the list, but do not want to send invites, select **Cancel**, and no message template will be included and no invites sent.

8. The dialog will close and a message confirming the survey(s) have been sent will appear.

Creating a New List Member

1. Click **Manage** by drop-down list and make a selection, either by List or by Member.

2. To access an existing list, click on the **List Name** menu.

3. The **Members in List** table populate with members (if any) for the selected List.

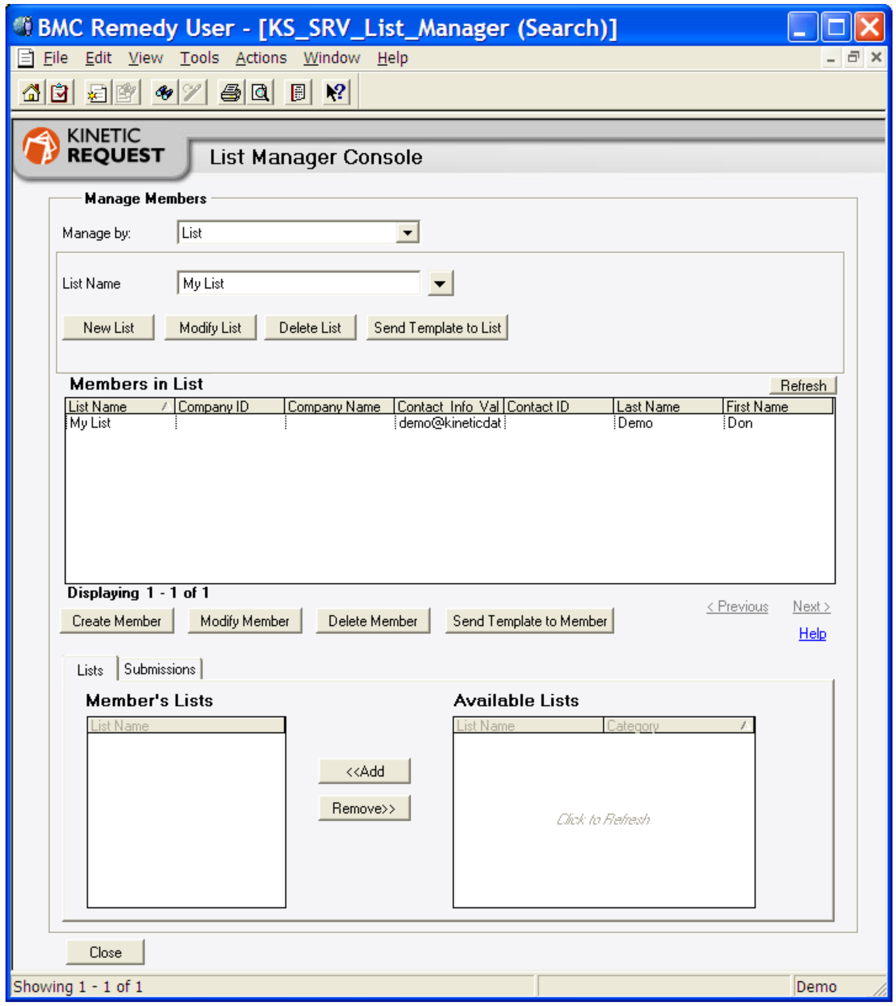


Figure 120: List Manager Console Screen

4. Click **Create Member.** The **List Member** screen displays.

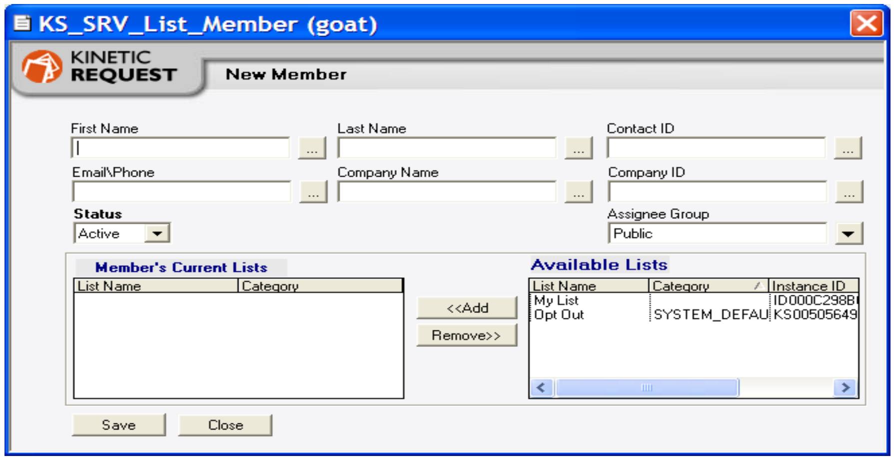


Figure 121: List Member Screen

5. Enter data in the appropriate fields listed in the New Member dialog. **First Name**, **Last Name** and **Email/Phone** are required.

Table 16: List Member Fields

Field Name	Description
Last Name	Enter member's last name
Status	Select a Status from the drop-down list box. Active is the default.
Contact ID	Enter an ID for this contact. This could be an account number, employee ID or ID from another system.
First Name	Enter the member's first name
Email/Phone	Enter an email address or phone number. This is the key for this record.
Company Name	Enter the member's company name
Company ID	Enter an ID for this company. This could be an account number or ID from another system.

6. Click the **Save** button.

MODIFY AN EXISTING MEMBER

1. Highlight a **List Member** and click the **Modify Member** button.

2. Make any changes to the fields from **Error! Reference source not found.**.

3. Click the **Save** button.

SEND A SURVEY TO ONE OR MORE MEMBERS

Using the **Send Template to Member** button below the members table will send a survey ONLY to the members selected in the table.

1. Select one or more members from the members table.

2. Click the **Send Template to Member** button below the member table. The **Send Survey Templates** dialog displays.

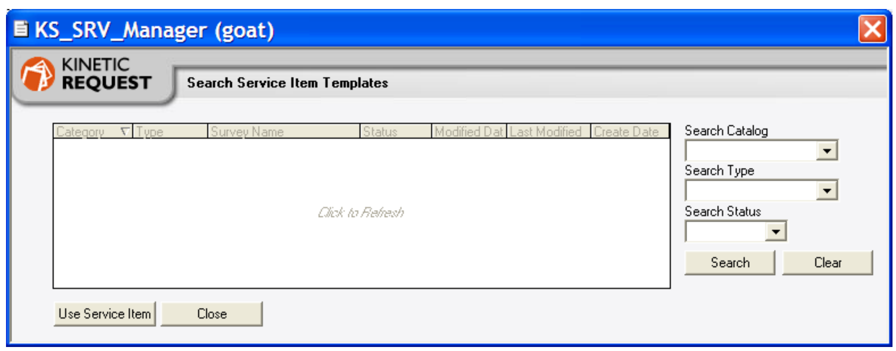


Figure 122: Search Service Items Templates Screen

3. Select a **Search Category** and/or **Search Type** and/or **Search Status** from the drop-down list box.

4. Click the **Search** button. Your results display in the fields of **Error! Reference source not found.**.

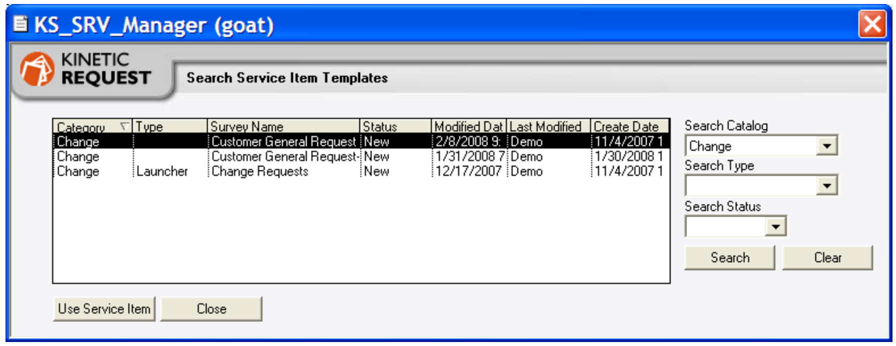


Figure 123: Search Survey Results

5. Click the **Use Survey** button to use this survey or the **Close** button is you want to change your survey parameters.

6. Click the **Clear** button to start your search again.

7. Highlight the template you want and click the **Use Survey** button. The Messaging Template Manager displays.

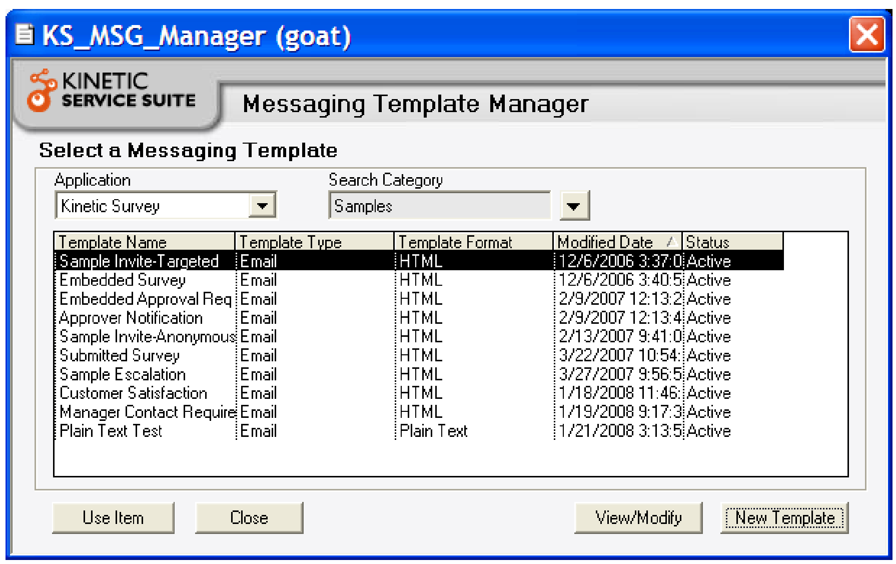


Figure 124: Messaging Template Manager Dialog

8. Select the Message Template to invite participants to the survey by selecting the message template in the table.

Note: The Category of the List is automatically entered in the **Search Category** field and will only show message templates under that Category, or whose category is unspecified.

9. Select **Use Item** to use the message template selected.

Note: If you want to create survey records for the members selected, but do not want to send invites, select **Cancel**, and no message template will be included and no invites sent.

10. The dialog will close and a message confirming the survey(s) have been sent will appear.

Other List Manager Functions

Searching for Members

You can search for members by Name, Email and other information.

1. In the List Manager Console, select **Manage by:** “Member”

2. Enter the critieria you want to search for in the six member fields.

3. Click **Search**.

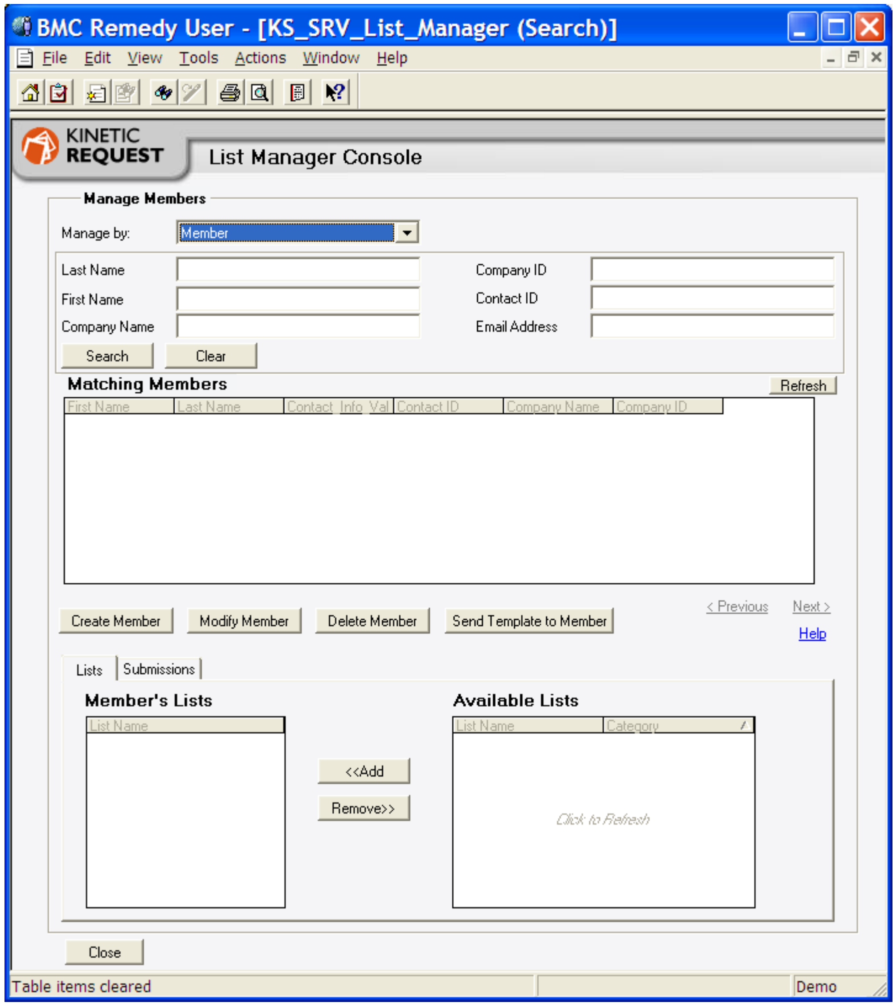


Figure 125: List Manager-Searching for a member

4. The members matching your criteria are shown in the **Matching Members** table.

Adding Lists to a Member

From the List Manager console you can easily add and remove members from one or more lists.

1. On the List Manager Console, select the member you want to modify. This can be done through **Manage by:** “List” or “Member” and selecting a member from the **Matching Members** table.

2. Select the **Lists** tab at the bottom third of the screen, if not already selected.

3. Use the **Add** or **Remove** buttons to add a member to a selected list or remove a member from a list.

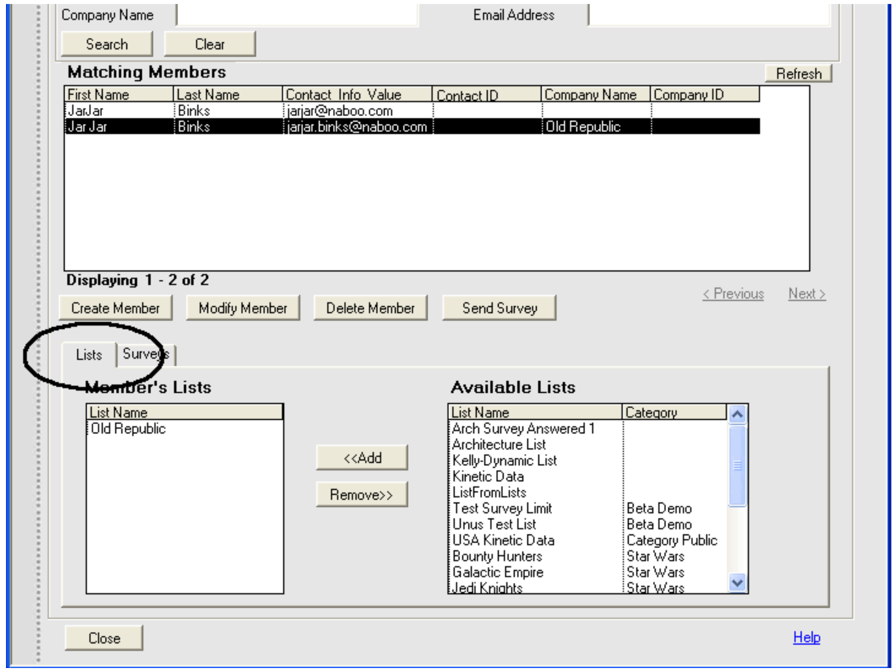


Figure 126: Add or Remove Lists From a Member

Viewing a Member's Surveys

View surveys associated to the member you have selected from the List Manager console.

1. On the List Manager Console, select the member you want to modify. This can be done through **Manage by:** "List" or "Member" and selecting a member from the **Matching Members** table.

2. Select the **Surveys** tab at the bottom third of the screen, if not already selected. The table shows the surveys that match the email address of the member selected.

3. Click the View button if interested in viewing the results of the survey.

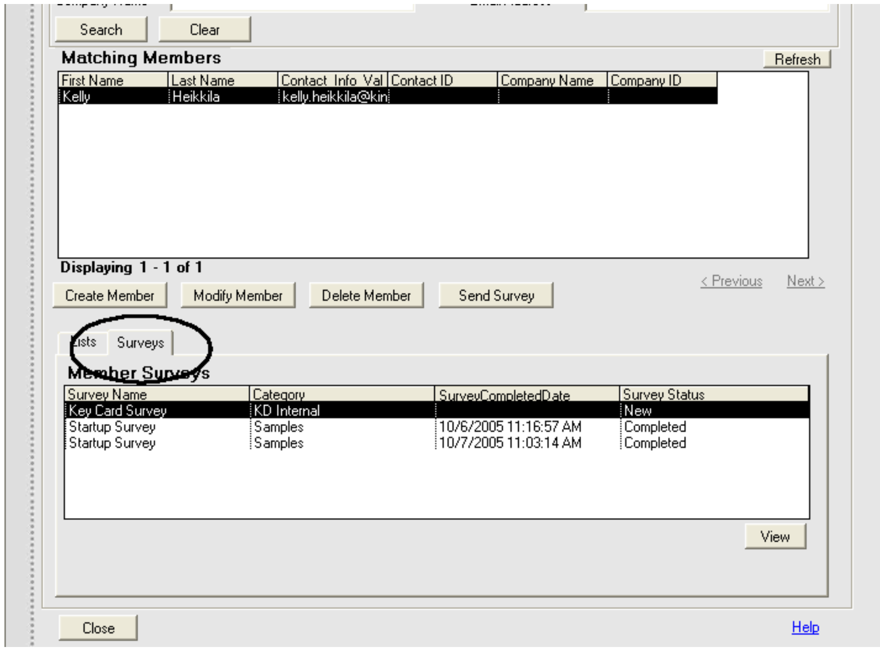


Figure 127: List Member Surveys

Configuration Manager

The Configuration Manager controls many of the default settings and administrative actions available to Kinetic Request In this dialog an administrator can manage:

- access to the web server(s) on which you plan to publish service items
- arrange answer patterns from which users can choose
- create error messages that submitters will see, and much more.

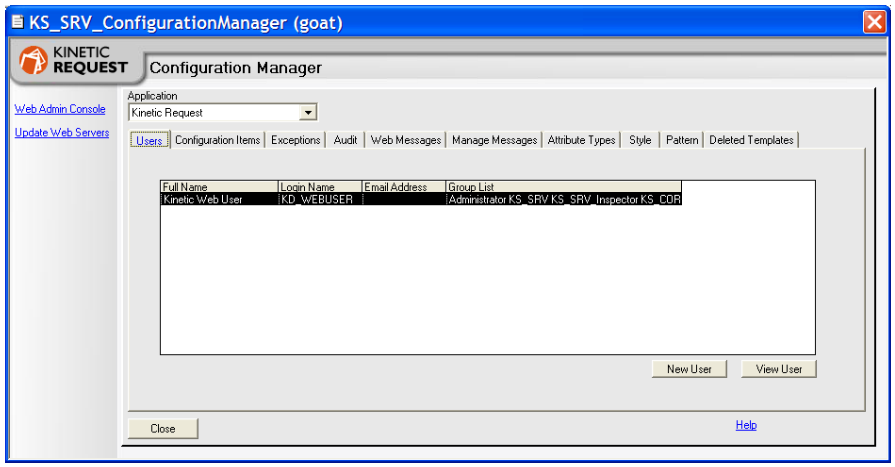


Figure 128: Configuration Manager

The hyperlinks to help manage some of these configuration applications (located on the left side of the Configuration screen), include:

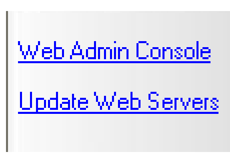


Figure 129: Configuration Menu Hyperlinks

Web Admin Console

This console covers many of the settings and functions based around the web server used with Kinetic Request. Once you login with a Remedy administrator ID, you will see the following screen:

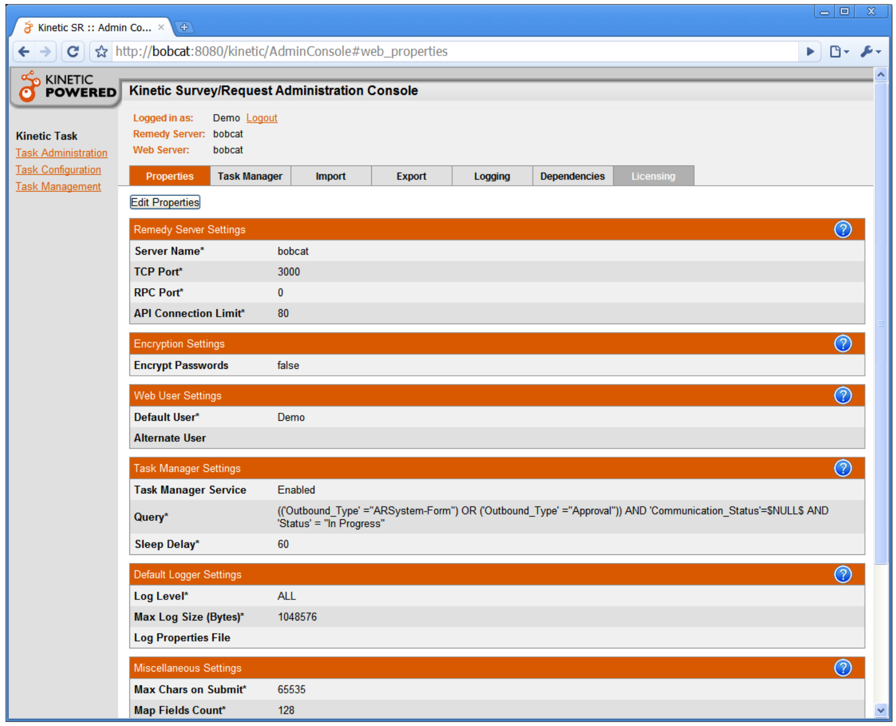


Figure 130: Web Admin Console

IMPORTANT NOTE

The Kinetic Task links on the right side of the web page are not covered in this manual. Please see the Kinetic Task User Manual.

The top of the window shows the user logged in, and the Remedy and web server that are being used. The tabs below describe the possible actions you can take from this page.

Properties

This section of the Web Administrator Console lets you view and update the contents of the properties file on the current web server. Each of the properties is described in the Installation Configuration Manager Guide.

Consult with your web administrator before changing these settings.

Task Manager

This page has three functions. First, you can start and stop the Kinetic Record Poller service that creates Remedy tickets and approvals from Kinetic Request (see the Kinetic Request User Guide for more information). The Settings section shows you the current status, and has the buttons to Start/Stop the service.

The section below settings contains the history from the Poller Logs, and lets you download the full log (only the latest 200 entries are shown).

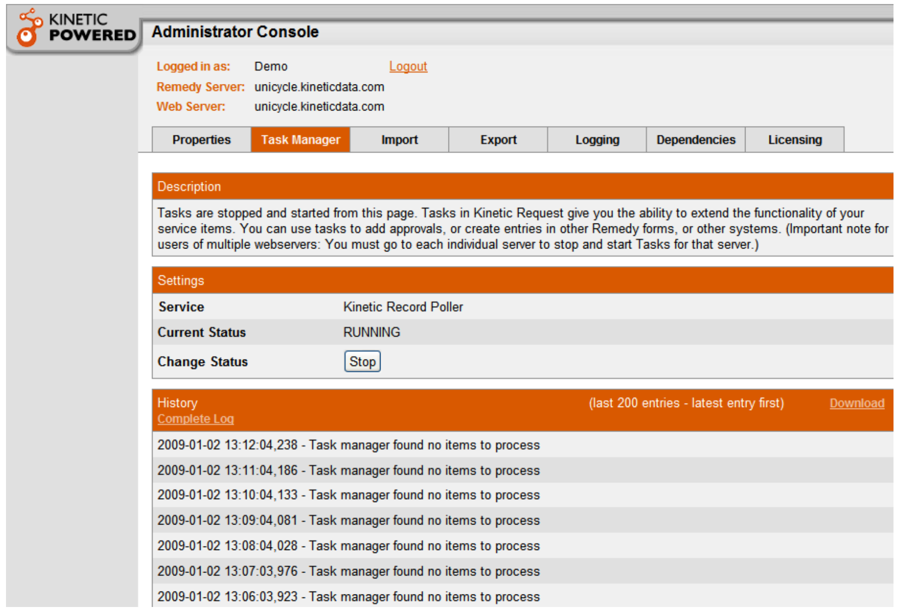


Figure 131: Web Administrator Console – Task Manager

Import

From this tab you can import service items that have been exported from other installs of Kinetic Request.

1. Click on the **Load** button.

2. Browse to the file that you want to import.

3. Click the **Upload** button and the file will be copied up to your web server.

4. Click the **Import** button button and the file is imported into your install of Kinetic Request.

At anytime before you click the **Import** button, you can cancel with either the **Clear** or **Cancel** buttons.

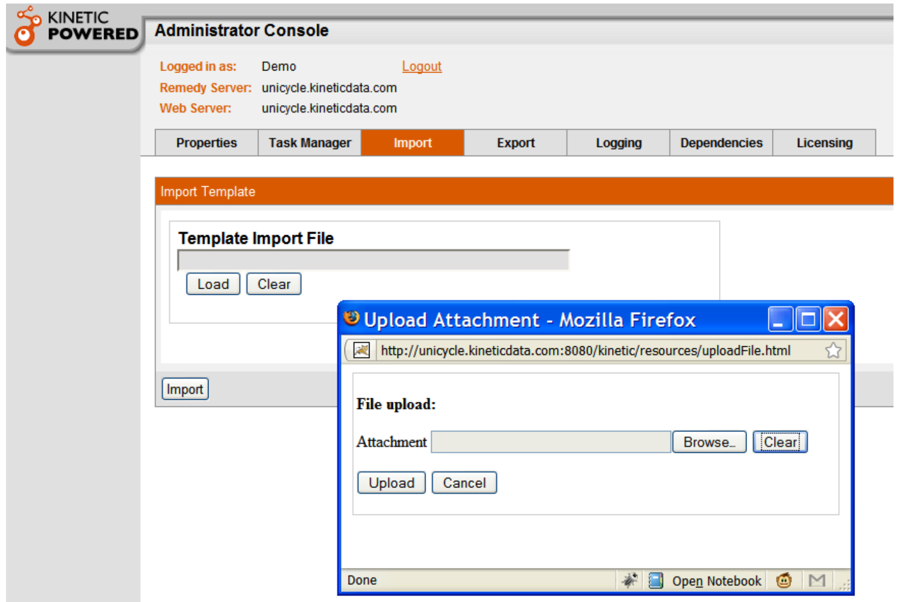


Figure 132: Web Administrator Console – Import Dialogs

Importing allows you an easy way to move survey templates from your development/test/Q&A environments to your production environment. You can also revert back to a previous version of a service items by re-importing older versions.

Export

The export tab allows you to make a zip file of your service items that can be imported onto another install of Kinetic Request using the Import tab.

1. Select the template from **Template** drop-down that you want to export.

2. Place a check (defaulted) for "Include Category/Service Catalog Definition" if you want to export that information.

3. Place a check (defaulted) for "Include Data Set" if you want that information exported.

4. Place a check for "Include Related Message Templates (by Category)" if you want to include that information.

5. Click the **Submit** button.

Be careful what information you include with your survey template, because it will overwrite any current information on the destination for the import. The most important selection here is the third option relating to Message Templates. They are exported by Category/Service Catalog and you may get templates you are not intending to transfer very easily.

The export process is also available from a link on the Advance tab for each service item. You must login as a Remedy Administrator, and then you will be taken to the same screen.

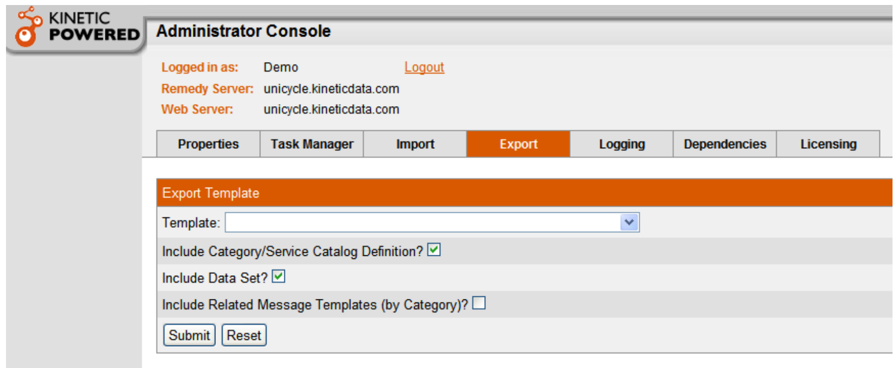


Figure 133: Web Administrator Console - Export

Logging

Logging for Kinetic Request is done on the web server, but through the Logging tab on the Web Administrator Console, you can access and download the log without having to access the web server directly. The top section shows the current log level and appender, while the lower section shows the 200 latest entries and has a link to download the current log.

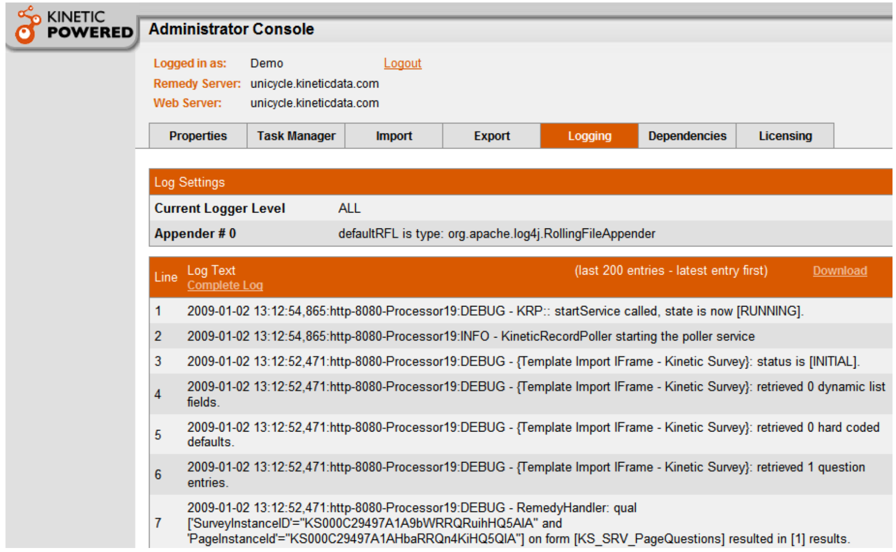


Figure 134: Web Administrator Console – Logging

Dependencies

This tab shows the name, version, confidence, and path to all the jar and web/API files used by Kinetic Request. This information is useful during troubleshooting and upgrades.

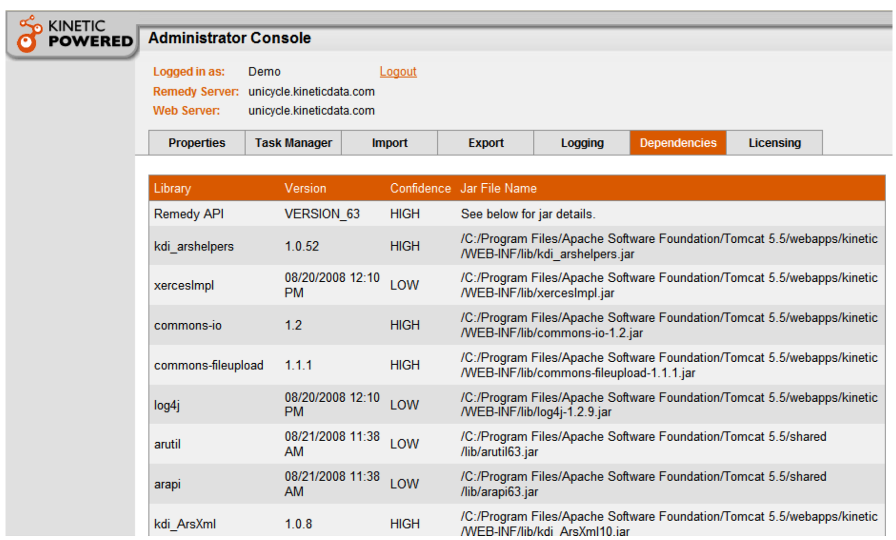


Figure 135: Web Administrator Console – Dependencies

Licensing

The final tab contains details about the licenses for the listed Remedy server and application. These values can be used to check how many Manager licenses are used or if your license has an expiration.

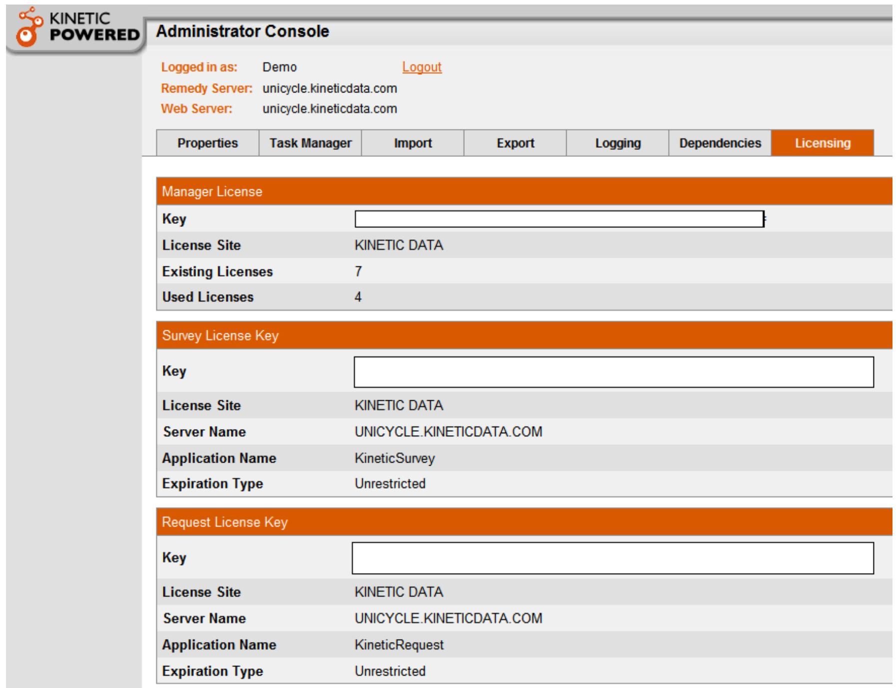


Figure 136: Web Administrator Console - Licenses

Update Web Server

Use **Update Web Server** to move several sample data going to your "development server", for instance, or if you recently purchased a new web server move all current Web Server URLs (in a "batch" manner) to your new web server.

Listed on the Configuration Manager **Users Tab** are all templates with corresponding Web Servers within your application. Clicking on the **Update Web Servers** hyperlink brings up the **Change Web Server** dialog.

This dialog enables you to pick one, some, or all of your current web servers and move them to another web server individually or at the same time.

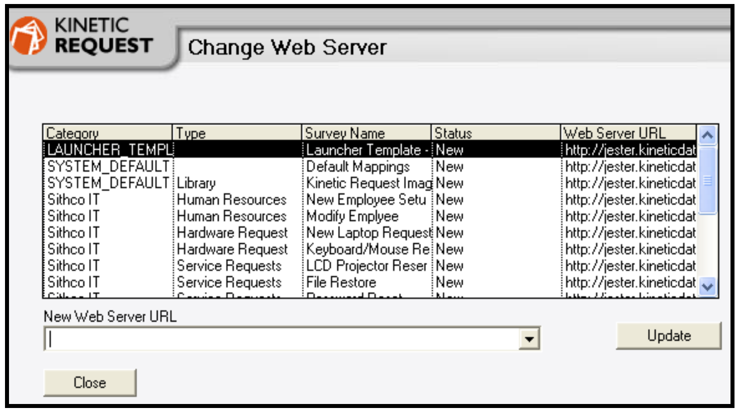


Figure 137: Change Web Server

1. From the Configuration Manager's **Users Tab** choose a Group List and click the **Update Web Servers** hyperlink.

2. Choose a **Web Server URL** from the list. (Shift to highlight multiple (batch) Web Server URLs.)

3. Type in the New Web Server URL in the field below, or choose from the drop-down menu.

4. Click **Update** and click **Close**.

CONFIGURATION MANAGER TABS

The Configuration link allows administrators to configure parts of Kinetic Request including:

- Users Tab
- Configuration Items Tab
- The Exceptions Tab
- The Audit Tab
- Web Messages Tab
- Manage Messages Tab
- Attribute Types Tab
- Pattern Tab
- Delete Templates

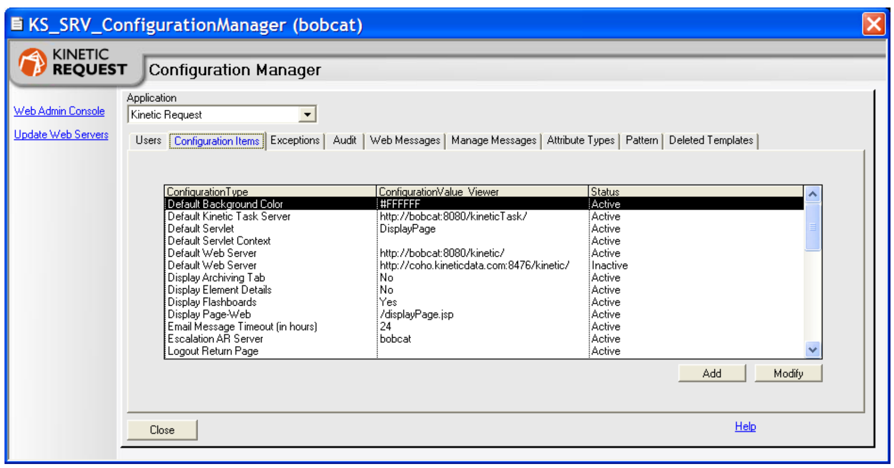


Figure 138: Configuration Manager

Note: The Tabs entitled **Categories**, **Attribute Types** and **Style** are application specific to either Kinetic Survey or Kinetic Request (i.e. Categories does not appear in Kinetic Request, while Attribute Type and Style contain similar but different information).

USERS TAB

The users tab displays a list of users that have permission to one or more "KS_SRV" groups. From this tab you can highlight a user to view their record or create a new user.

Using one of these buttons will open your AR System **User** form. The Configuration Manager dialog needs to be closed before the User record can be modified.

See your AR System documentation for more information on adding or modifying users.

Configuration Items Tab

The configuration items tab displays information on the configuration of your system. This is typically used during the installation of the application and does not need to be changed unless your environment changes. The configuration items are discussed in more detail in the *Kinetic SR Installation and Configuration Guide*.

Add a Configuration Item

1. From **Configuration Manager** click the **Configuration Items** tab and click **Add**.
2. Make a selection from the **Configuration Type** drop-down list box.
3. Select a **Locale** from the drop-down list box. For example: *English (Canadian)*. --Optional--
4. Select a **Status** from the drop-down list box.
5. Select a **Property** from the drop-down list box. For example: *Remedy Property or Web Property.* --Optional--
6. Enter your configuration value in the **Configuration Value** field. For example: *Submit* if you select *Submit Button Text* for the **Configuration Type**.
7. Click the ellipses (**...**) next to the **Configuration Value** field to add, edit or delete content in that field.
8. Click the **Save** button. Your new Configuration Item is saved.

Modify a Configuration Item

1. Double click on the **Configuration Item**. Click the **Modify** button.
2. Make your modifications to the **Configuration Type**, **Locale**, **Status, Property** and/or **Configuration Value** fields.

3. Click the **Save** button.

The Exceptions Tab

The exceptions tab lists exceptions (errors) users may have experienced while submitting a request via the web.

- **Date, type, severity** and **description** areas are offered describing the exception (or error).

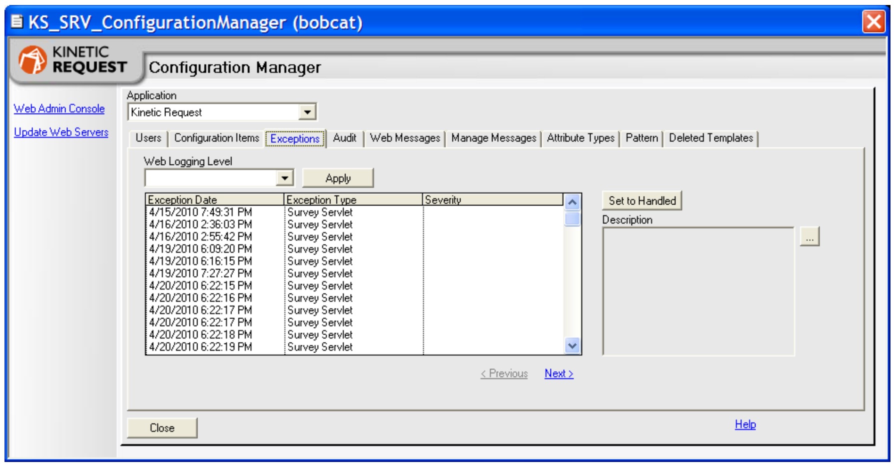


Figure 139: Exceptions Tab - Configuration Manager

NOTE

Exceptions or errors are written back into Remedy when possible.

They are usually used during a support call or for your Administrator to troubleshoot problems.

The exceptions tab also allows you to view and change the logging level on the Kinetic Request web component. By changing this value, it changes which messages are actually logged in real time for your web component. This allows logging level changes without restarting your web server. Log files are accessible from your web server in the Kinetic Request directory.

The Audit Tab

The Audit tab on the configuration manager allows you to view which request templates that have been deleted and by whom.

View an Audit Item:

1. Highlight the request you want to look at.

2. Double-click on the request.

   -Or-

Click the **View** button. The **Kinetic Audit** dialog displays for you to view the request.

Figure 140: Kinetic Audit Information

3. Click the **Close** button when you're done viewing the audit data.

Web Messages Tab

The web messages tab displays the different error messages a user can see when submitting a request. By default, these messages are in English. These can be updated to include information more specific to your company.

Web Messages can also be locale-specific. By setting a locale for your messages (other than English) requests using that locale will display a message in the correct language for your customer.

Manage Messages Tab

The Manage Messages tab offers Administrators the ability to view email messages that have not been sent out of the system (in pending status). Most often, the problem occurs because a message template has been incorrectly formatted. This screen helps determine where the problem may have occurred.

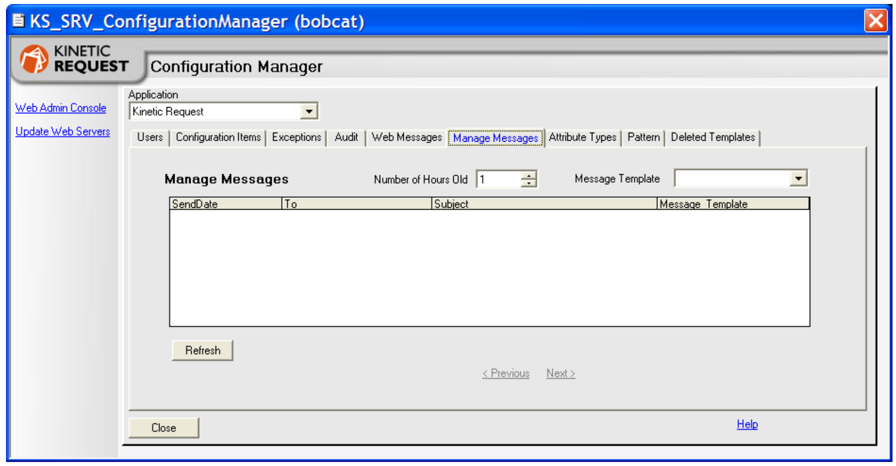


Figure 141: Manage Messages Tab

The **Message Template** drop-down list allows you to investigate where a delay may be occurring by viewing available message templates.

The **Number of Hours Old** box allows you to prioritize messages by the oldest "pending status", or by a particular group of delayed messages.

ATTRIBUTE TYPES TAB

A request's specific attributes can be added and modified from the **Attribute Types Tab**. Attribute Types show up on the Settings Tab of the request. These are administrator-defined attributes where request authors can enter information for purposes of reporting and other organizational needs.

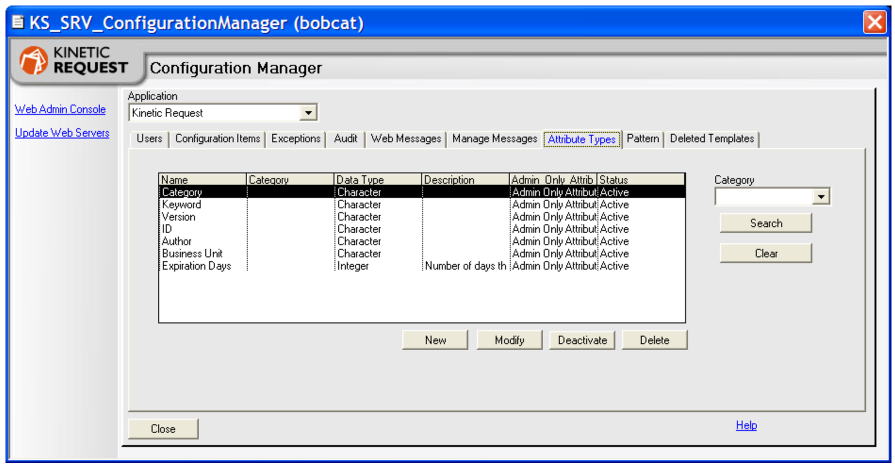


Figure 142: Attribute Types Tab

1. On the Configuration dialog "Attribute Types" tab, Click **New** or **Modify**. A dialog will appear.

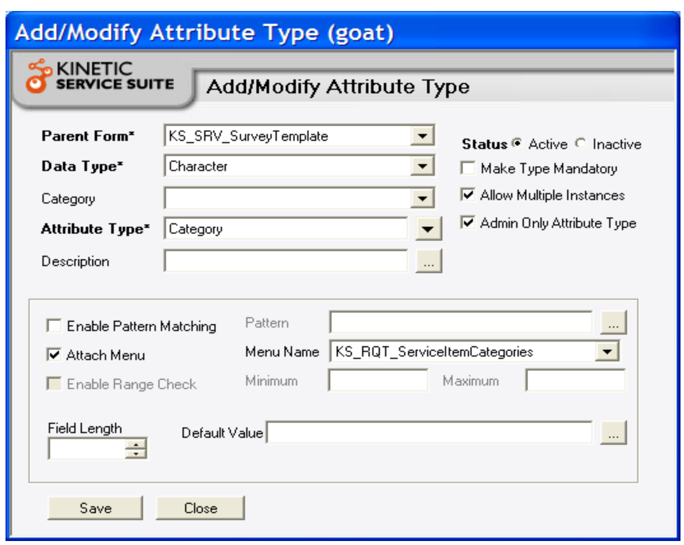


Figure 143: Add/Modify Attribute Type dialog

2. Choose **Data Type**. For example, if character is chosen as a **Data Type**, that choice enables the **Enable Pattern Matching** and **Attach Menu** checkboxes, offering a user more control over how request attribute can be adjusted and modified.

   If you choose an **Integer** in the **Data Type**, the **Enable Range** checkbox becomes available. Enter a numerical range from **Minimum** to **Maximum**, **Field Length** and **Default Value**.

3. If a **Category** is set, the data type will only be available to request templates with that Category. Leaving category blank will make the attribute available to all requests.

4. Click **Make Type Mandatory** if needed. This will require that a request author fill in this attribute when saving a template.

5. NOTE: Mandatory attributes will only be required once a request template becomes "Active".

6. Click **Allow Multiple Instance**s for those circumstances when a request author will need to add multiple values to this attribute type. An example is "Request Business Unit", where multiple values for a business unit would be entered such as: H.R., Request Business Unit IT, Request Business Unit, Marketing, etc.

   Admin Only Attribute Type are reserved for Kinetic Request "out of the box" attribute types such as expiration date.

7. **Enable Pattern Matching/Pattern** allow you to set a pattern that the attribute follows. These patterns use Remedy ARS Pattern syntax. See your administrator guide for available pattern types in Remedy.

8. If needed, choose from the **Menu Name** drop-down list, as shown above.

9. Choose **Save** and **Close**.

PATTERN TAB

Creating a Pattern Label generates an indicator of how users or customers will view a particular field. For example, if the answer requires an Integer, the Pattern Label field may read as "Integer 1-12", indicating that only numbers 1 though 12 can be used for that field. If a pattern doesn't match a customer's response, a prompt will appear for a specific default pattern.

TIP:

A single quote { ' } must be preceded by an escape character { **/** }.

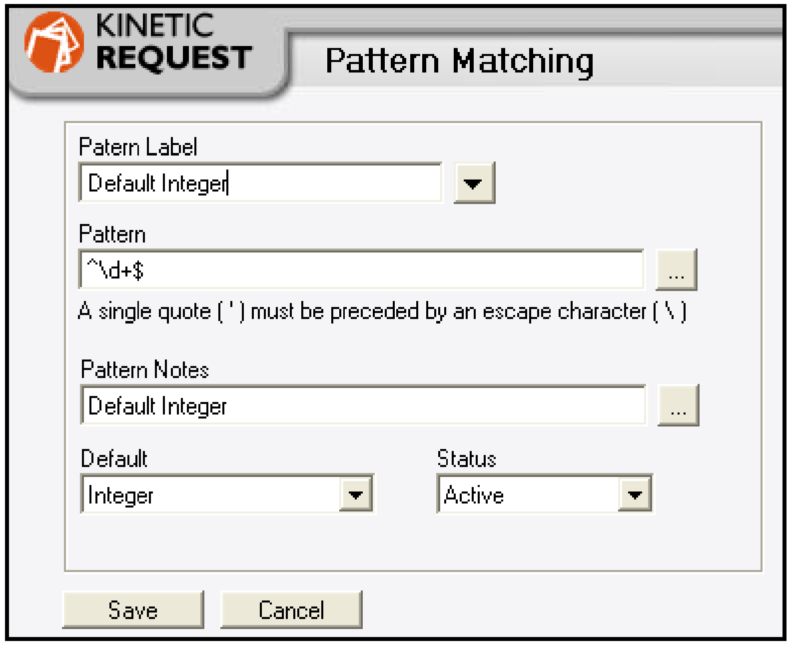


Figure 144: Pattern Tab (Add)

1. Choose from the drop-down menu, or type in a **Pattern Label.** This is what authors will see when adding a pattern to a question and should be descriptive.

2. Under the **Pattern** field type in a regular expression specific to the Pattern Label entered.

3. Regular pattern coding can be difficult to decipher. **Pattern Notes** is an opportunity to offer helpful information for a future Administrator or user regarding this pattern.

4. The **Defaults** field allows you to specify whether this pattern will automatically be selected when an author creates a question of this type. There should be only one **Default** response for each.

INTEGRATION MANAGER

The Integration Manager allows Administrators to view the various data sources that are feeding information to Kinetic Request as well as the corresponding rules and data sets associated with requests. Integrating a data source includes other steps done from the AR Administrator Tool, and is described in further detail in the *Kinetic Request Integration Manual.*

Integration Points

Integration Points are the actual data sources for Kinetic Request.

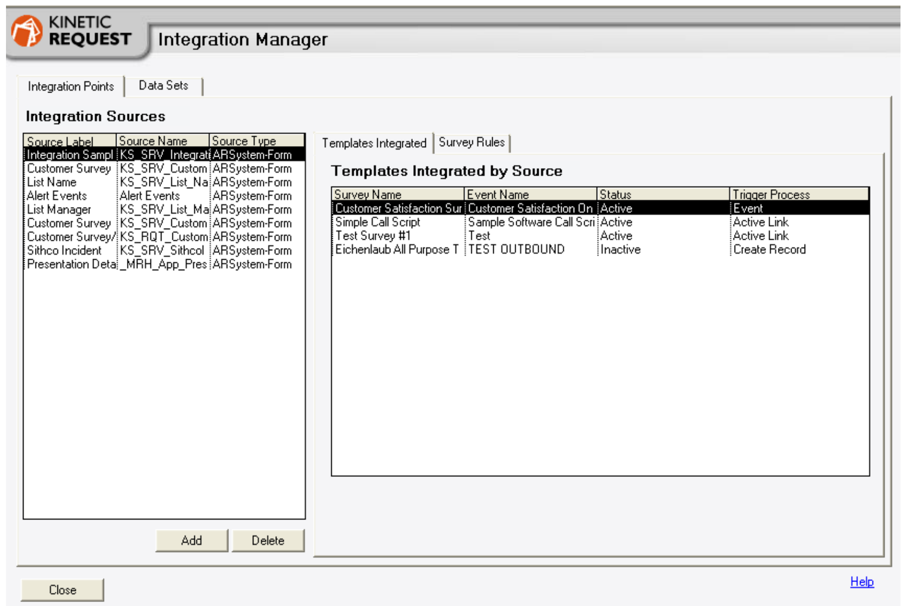


Figure 145: Integration Manager Dialog

There are four **Source Types** where triggered requests can originate:

- ***ARSystem-Form***: A form originating on the same server your Kinetic Request application resides on.
- ***ARSystem-WebServices***: Request data coming from an external source using the Kinetic Request web service to create requests.
- ***Import***: Request data coming into Kinetic Request via the Remedy Import Tool.
- ***Request List Manager***: Requests generated via the Kinetic Request List Manager.

Adding an Integration Source

1. While on the **Integration Points** tab, click the **Add** button.
2. A message displays: When adding a new form, filters will need to be added to trigger request checking, and batch requesting. This must be done using the Remedy Administrator tool. Click **OK**.

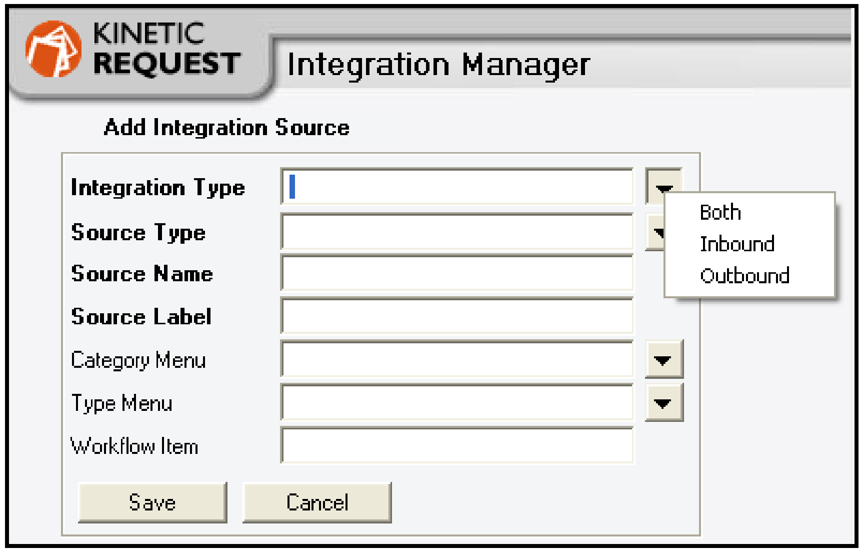


Figure 146: Integration Manager Add Integration Source Dialog

3. Select an **Integration Type** from the menu.

4. Select a **Source Type** from the menu.

5. Enter any name or label in the **Source Name** field, or select from the menu if the Source Type is an ARSystem-Form.

6. Enter a label name in the **Source Label** field. This is the label your users will see when integrating a form or creating a qualification.

7. Select a **Category** from the menu.

> **Note:** Category and Type fields may have menus defined by your Administrator. This is a good way to segment your integration points where one source form has many integration points.

8. Select a **Type** from the menu.

9. Optionally enter a **Workflow Item** to track any workflow associated with this soucre.

10. Click the **Save** button.

Delete an Integration Point

1. While on the **Integration Points** tab, highlight the **Source Label** you want to delete.

2. Click the **Delete** button.

3. A prompt displays to ensure you want to delete the data and everything associated with it. Click **Yes**.

Requests Integrated Tab

The Requests Integrated tab shows requests that use the highlighted Integration Source as one of their data sources.

1. Highlight the **Integration Source** you want to view.

2. The **Requests Integrated** tab displays the **Requests Integrated by Form** in its fields: **Request Name**, **Event Name**, **Status** and **Trigger Process**.

Integrated Templates Tab

This tab lists **Integration Templates** and **Requests Using Templates**. Integration Templates are qualifications that have been stored and can be re-used for other requests when creating integration points.

Add an Integration Template

IMPORTANT

Changes to Integration Points will be audited.

1. Click the Add button.

2. Enter text in the **Integration Name** field.

3. Select a **Form Name** from the drop-down list box.

4. Enter text in the **Qualification** field.

5. Click the ellipses (**...**) next to the **Qualification** field to add, edit or delete content in that field.

6. Click the **Save** button.

DATA SETS

TIP

Keep in mind that the Field Labels you create now may be for a specific integration, but Data Sets can be used for more than one integration.

Keep your Field Label generic enough to be used for other integrations, but specific enough that they are useful to your users.

A Data Set and its mappings help both the AR System Administrator and Users to work with Kinetic Request. Kinetic Request includes 64 generic "attribute" fields for every customer request created. These attributes will get used in message templates, in request text, in qualifications, and reporting. If they were left as generic field names, it would be difficult for you or your users to remember what type of data is in Attribute6 or Attribute62.

To solve this problem, Kinetic Request includes the concept of Data Sets. Data sets are nothing more than handy labels for the fields you use within a request. Menus that reference these fields use the data set name for a field rather than the generic name. So rather than seeing "Attribute62" on a field menu, your users will see "Department" or other useful name that you give it.

A request can have only one data set. However, in your entire Kinetic Request application, you will likely have a number of data sets. Some data sets will apply to many different requests; others will be specific to one. If no Data Set is selected by the Request author, the "SYSTEM_DEFAULTS" Data Set will be used.

While creating a Data Set for a specific integration that you have constructed, it is a good idea to have the filter you created to reference what fields from your originating system are pushed into fields on Kinetic Request.

CREATING A DATA SET

1. Open the Integration Manager from the **Integration Manager** link on the left side of the Request Manager console.

2. Click on the **Data Sets** tab.

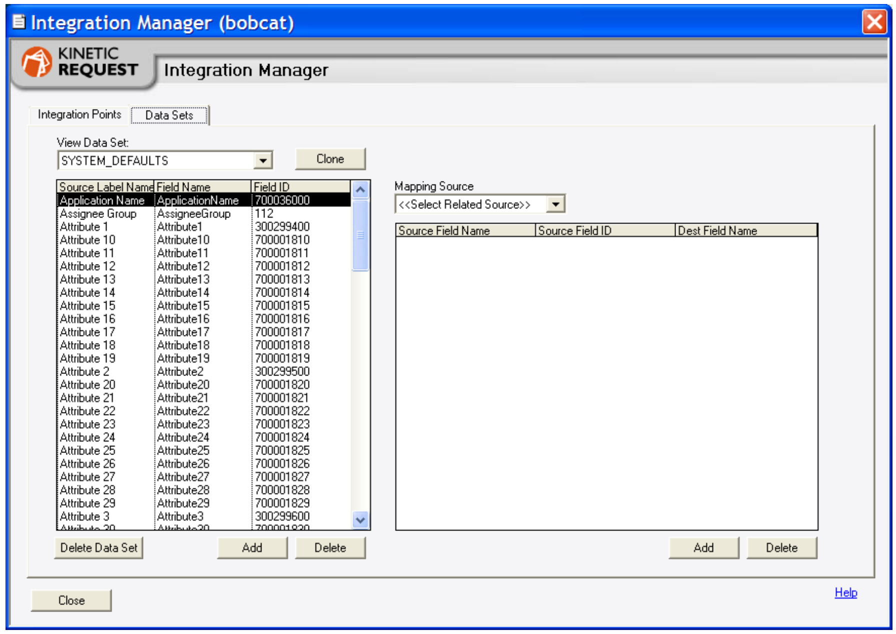


Figure 147: Screen clip: Integration Manager-Data Sets

3. You will see the "SYSTEM_DEFAULTS" Data Set displayed. Click on the **Add** button below the Data Set table. The Data Set Item dialog appears.

4. Type in a new name for your **Data Set**, or use the menu to select an existing Data Set if you are adding a new item.

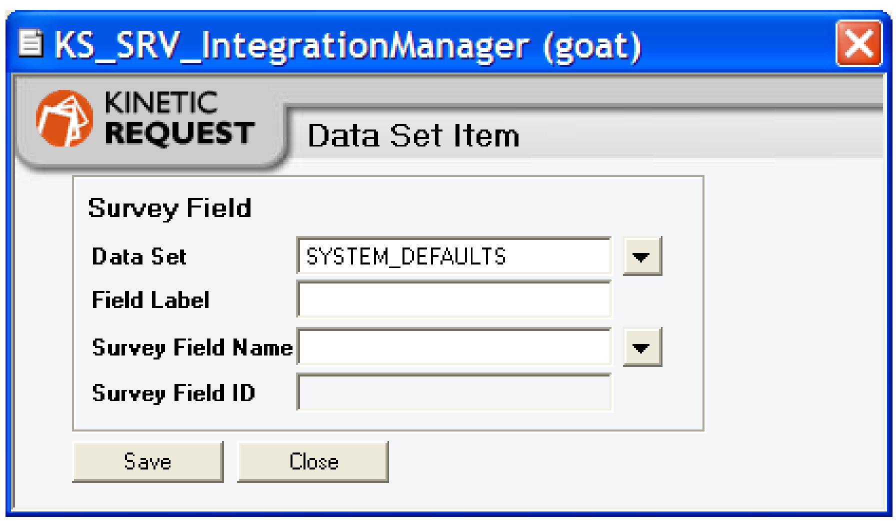


Figure 148: Integration Manager-Data Sets

5. Type a name for your **Field Label**. This will be the label that users see for the Request Field Name selected in the next step. This will represent one of the fields you are pushing into Kinetic Request if you are creating this for a specific integration.

6. Select a **Request Field Name** that the Field Label will apply to. The Request Field ID is automatically populated.

7. Click **Save.**

8. Repeat this process for each field that is a part of your Data Set. Keep in mind to create items for any generic "attribute" fields, but also create data set items for the standard fields, as well such as First Name, Last Name, Company, and other fields that you want made available to users. Refer to the SYSTEM_DEFAULTS Data Set for the most commonly used standard fields.

DATA SET MAPPINGS

Once your Data Set is finished, you can optionally add mappings. Remember your Data Set is just labels for your request fields. You have not specified the actual fields that populate each Data Set Item.

Data Set Mappings allow you to track exactly what fields populate your requests. For example, you may have both an integration from another AR System form, and a web service populating a request using its specified Data Set. You could create both a mapping from your AR System form, and a mapping from your web service to manage what fields from each system move data into your request.

Data Set Mappings are only for reference, and are therefore optional. No filters or workflows use the mappings. Rather they are there to help you manage your data sources. With only a request or two, the data sources used are easy to remember. However, once your use of Kinetic Request grows, it is possible you have many different mappings for different source of data feeding requests.

DELETE DATA SET

To delete an entire data set, select it from the **View Data Set** list and click the **Delete Data Set** button.

Warning: If this data set is in use on any service item, your qualifications and mappings may not work.

Creating Data Set Mappings

1. Open the Integration Manager from the **Integration Manager** link on the left side of the Request Manager console.

2. Click on the **Data Sets** tab.

3. Select the Data Set (previously set up) that you want to map fields to from the **View Data Set** menu.

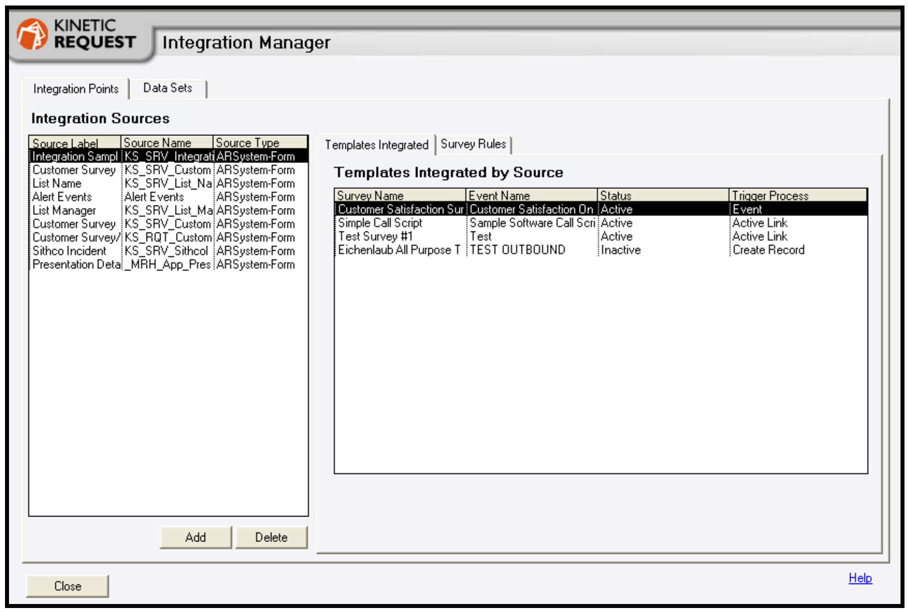


Figure 149: New Integration Point Dialog.

4. Click **Add** Below the Mapping Source table. The Data Set Mapping dialog appears.

   The left side of the dialog under "Source Field" represents where the data is *coming from*. The right side of the dialog under "Request Field" represents where the data is *going to*.

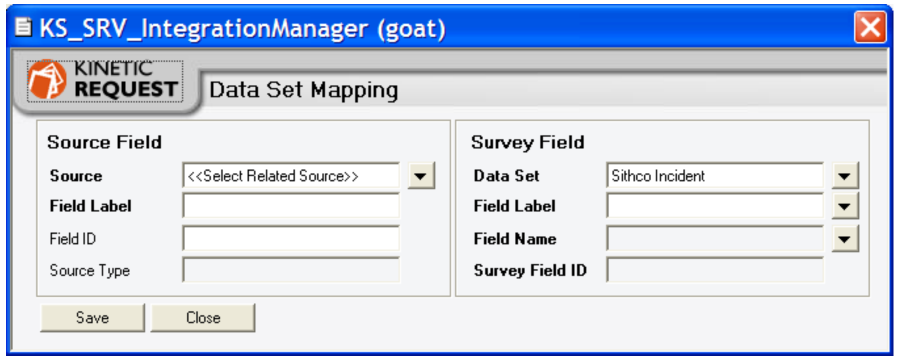


Figure 150: New Integration Point Dialog.

5. Select a **Source** from the menu.

6. Select a **Field Label** from the menu if it is an AR System form. If the source is of another type (AR System-Web Service, Import, List Manager), then type in a Field Label.

7. If the FieldID has not been set, optionally type in a Field ID.

8. From the Request Field side, select a **Data Set**.

9. From the **Field Label** menu, select the field that the source field will be mapped into. The Field Name and Request Field ID will automatically be set.

10. Save the mapping by clicking **Save**.

11. Repeat this process for each field that needs to be mapped into the Data Set.

Report Manager

The Report Manager allows Crystal or Remedy report developers to attach new reports to Kinetic Request or to save existing reports to be modified. The reports found in this manager are then shown to the viewer on the Reports tab or Advanced Reporting Console.

This dialog can only be accessed by a Remedy Administrator.

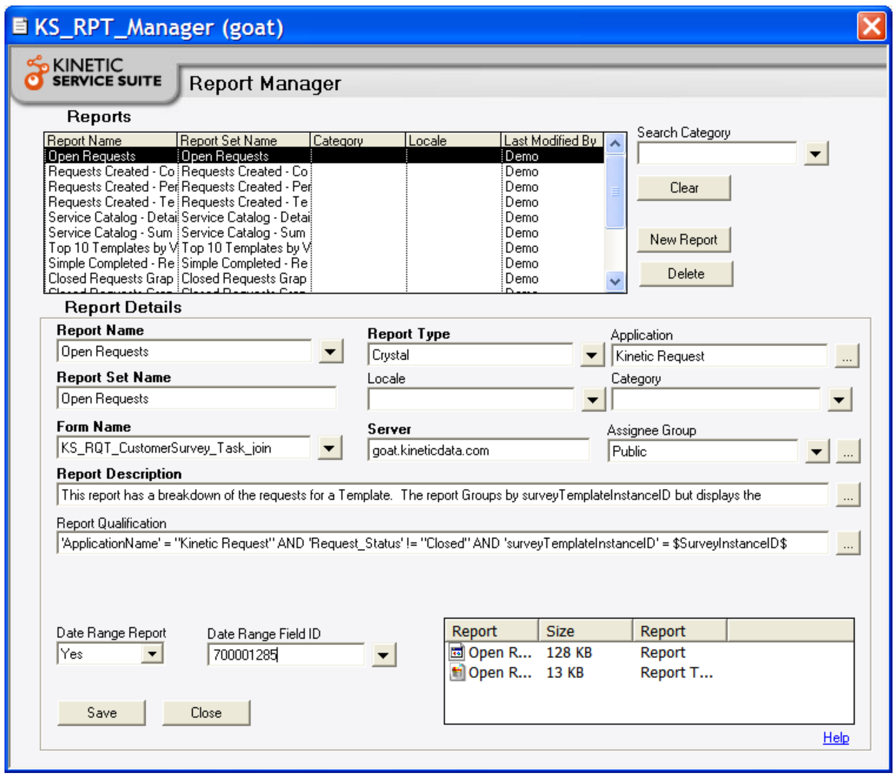


Figure 151: Report Manager

You can view each report by selecting it in the Reports table at the top of the form.

Chapter 6 REQUEST SUBMISSION MANAGER

This chapter provides procedures for users (including "non-author" users) to perform the following:

- Finding Request Templates
-

Perform Advanced Search:

- Run Reports

A user can access the **Request Submission Manager** without a Kinetic Request user license. An unlimited number of users have access to the system as long as they have the following groups added to their user record:

```
KS_SRV
KS_RQT_Inspector
```

Accessing the Request Submission Manager Console

IMPORTANT

The Tasks referred to on the Submission Manager Console only refer to the old (pre v5 task system). Tasks in the new version are handled with their own set of consoles and their own manual.

From one single place, the KS_RQT_Inspector (Request Inspector), can view or complete request results, send new information, resend or delete a request, and add notes or close requests.

To Access the Request Submission Manager Console

From the Remedy Home page, double click on

Kinetic Request-Submission Console. The **Request Submission Manager Console** dialog appears.

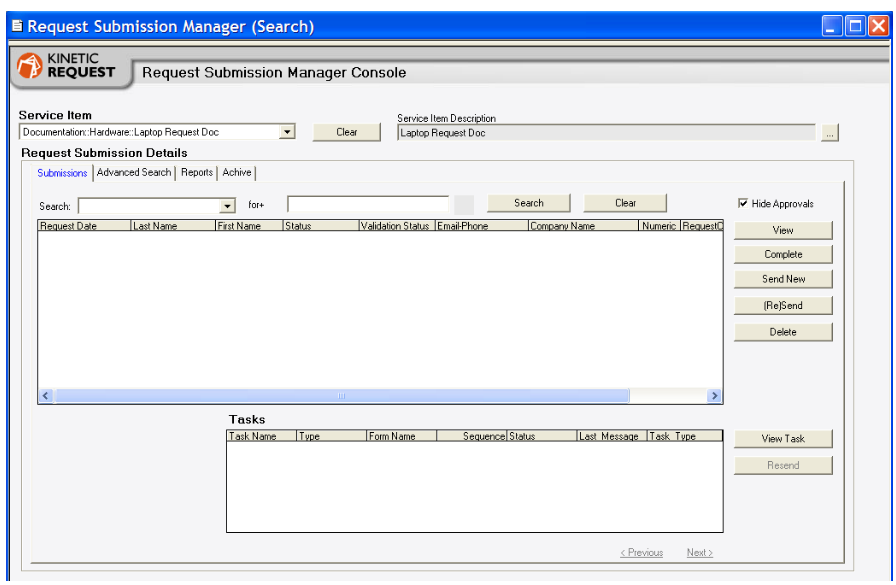


Figure 152: Request Submission Manager Console

Request Submission Details

From the **Request Submission Details** section of the **Request Submission Manger Console** a user can search, monitor, comment, close, resend and delete requests.

Using the Submissions Tab

The Submissions tab can be viewed by "non-author" users, Request Inspectors and Request Managers. Individuals monitoring request results can use this tab without having permission to actually change request templates or other configuration items.

Finding Request Templates

The Request Submission Manager Console has two sections:

- At the top, the **Service Item** and the **Service Item Description** section displays request templates currently available in the system.

At the bottom, the **Request Submission Details** section displays request template details highlighted in the top section. The **Tasks** section displays any tasks related to the selected request.

If the task option **Use Kinetic Task Engine** is checked for that service item, the Task table and associated buttons and text are hidden and a **Kinetic Task Manager** button is visible.

Search For Customer Request(s)

1. Access the Request Submission Manager.
2. Highlight the name of the request template.
3. In the Request Submission Details section of the screen, select the **Submissions** tab.
4. From the **Search** field, select an item to search for from the menu:
5. In the **For +** field, enter the criteria to search for (if any).Press **Return** (or click **Search**). A list of requests matching the criteria appears in the table below.

To clear the **Search** and **For +** fields and begin a new search, click **Clear**.

View the Customer Request

You can view the answers of an existing request via the **Submissions** tab. Any request whose status is either "In Progress" or "Completed" can be viewed.

1. In the Request Submission Details section of the screen, select the **Submissions** tab.

2. Select a Request from the table.

    - If the request is in "In progress" or "Completed" status click the **View** button to see the answers and attributes.

    - If the request is in a "Sent" status click the **Complete** botton to open the request in your default browser.

3. If the request has not yet been completed, the request will be displayed to be filled out.

4. Either Double-Click on the row in the table or click View/Complete to view the results.

The **Completed Customer Request** form allows Request Inspectors to view the answers that this submitter has entered as well as other information about the request item.

Request Inspectors can change answers, and some request values, from this screen. Any changes made to the request are audited including who made the change, when the change was made, and what the previous value was.

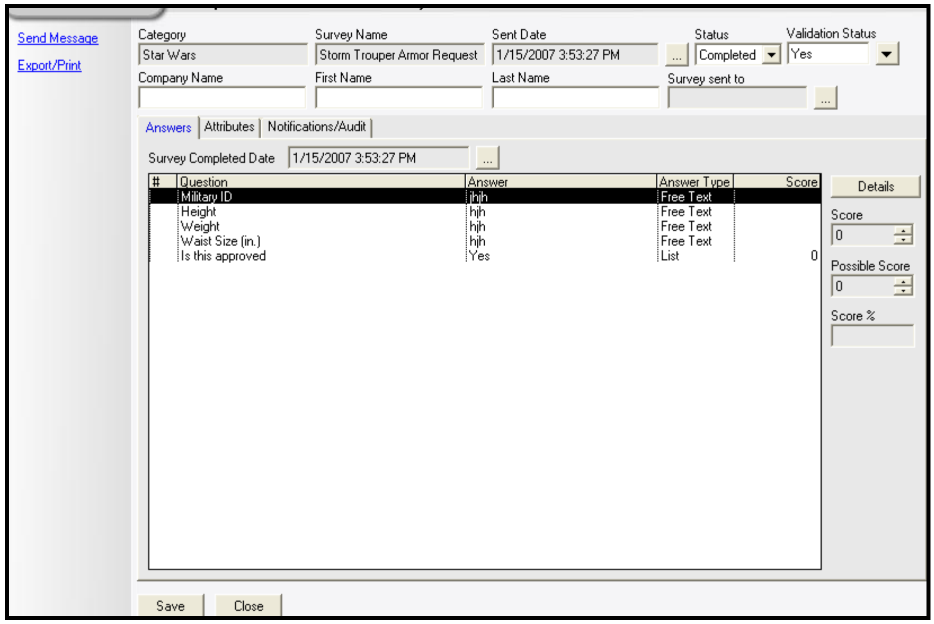


Figure 153: Completed Submission

*From the **Attributes** tab, other request information can be seen. See*

Table 7: Completed Submission Fields-Attributes Tab

The **Notifications/Audit** tab includes information on notifications (invites, reminders, and escalations) that have been sent relating to this request, as well as audits of any information that has been changed and a field to hold internal notes. See Table 8: Completed Submissions Fields-Notifications/Audit Tab.

TASKS

Highlighting a (parent) service item or request from the **Request Submission Details** window allows for the viewing of **Tasks** affiliated with the particular request item. See Task window at the bottom of the screen. Different messages appear as waiting on approval or an approval has been accepted, etc.

If the task option **Use Kinetic Task Engine** is checked for that service item, the Task table and associated buttons and text are hidden and a **Kinetic Task Manager** button is visible.

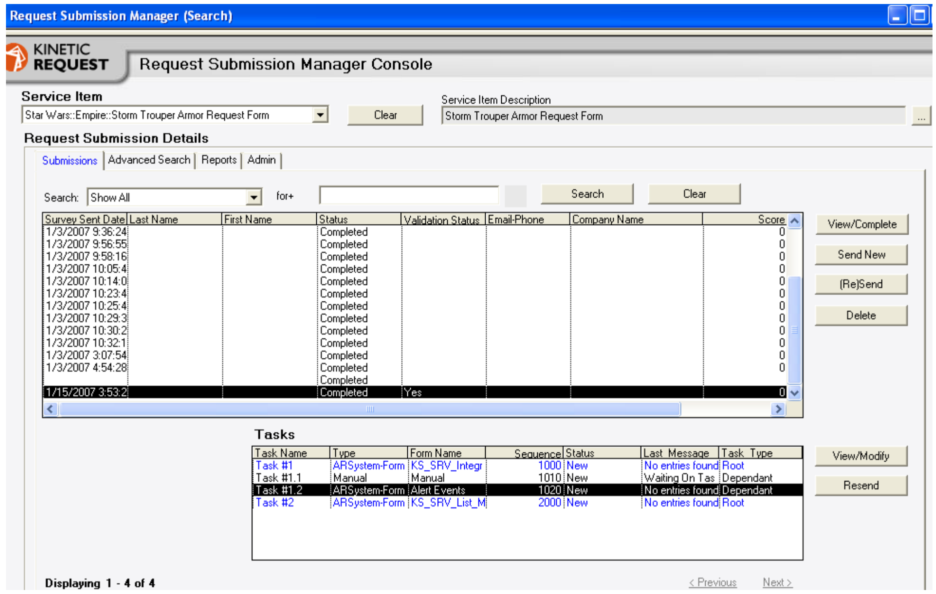


Figure 154: The Task Window

To the right of the **Task** window click, **View/Modify** to open a Task dialog. Here is where communication modifications can be made, along with changing the status.

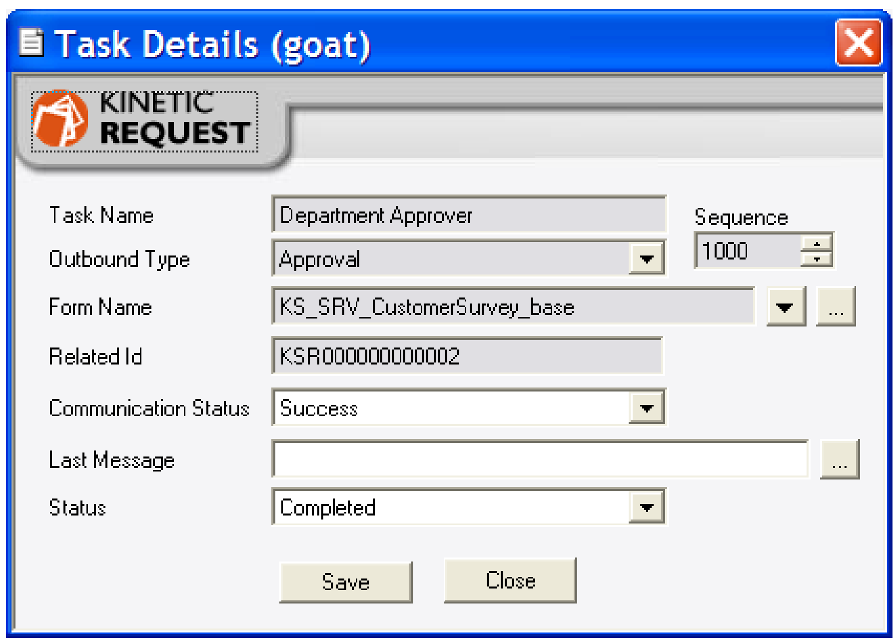


Figure 155: Task dialog

ADVANCED SEARCH

The **Advanced Search** form allows you to search for a customer request using more criteria than the drop-down menu search. For example, you can search for anyone who answered any request with the name, Kelly, in the last three days.

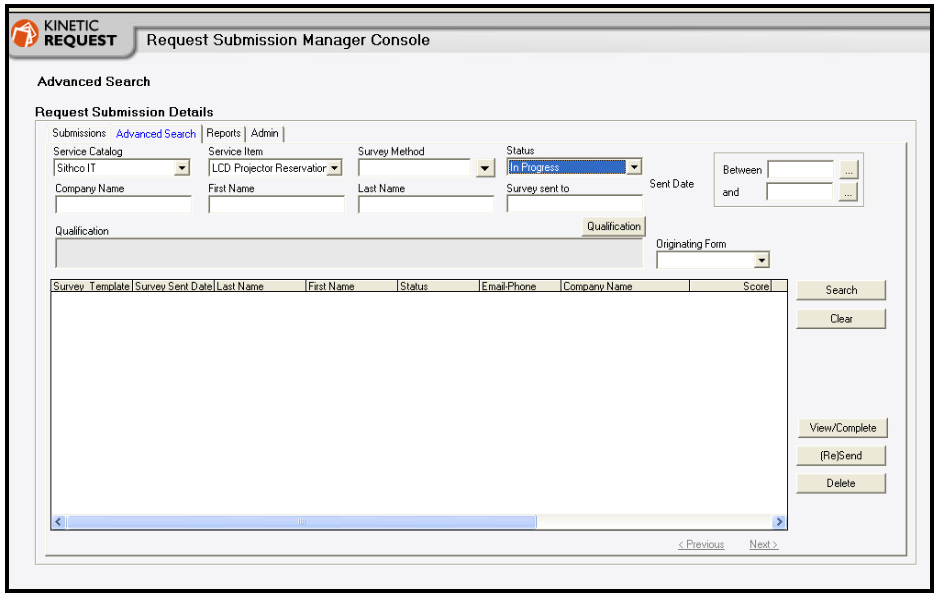


Figure 156: Advanced Search

NOTE

When you access the **Advanced Search** window from the link on the left column, the **Advanced Search** starts with only the category you were currently searching on for Request Templates, if any. By accessing the **Advanced Search** form from the **Submissions** tab, the search includes the category and name of the request template you are working with currently.

Perform Advanced Search:

1. Access the **Request Manager**. See Accessing the Request Manager.
2. Select the **Submisions** tab.
3. From the left column, select **Advanced Search**. The **Advanced Search** form appears.
4. Select the search field information. You can fill in one or more fields to refine the search.
5. To include Request Values (answers) you can use the Request Values Qualification toinclude attributes or request answers into your qualification.
6. Click **Search** to display requests that match your criteria.

From the results table you can open individual requests by double-clicking or clicking **View**. For more information on viewing request results, please see View a Customer Request.

Reports

The Reports tab allows you to choose a report and run it for the currently selected request.

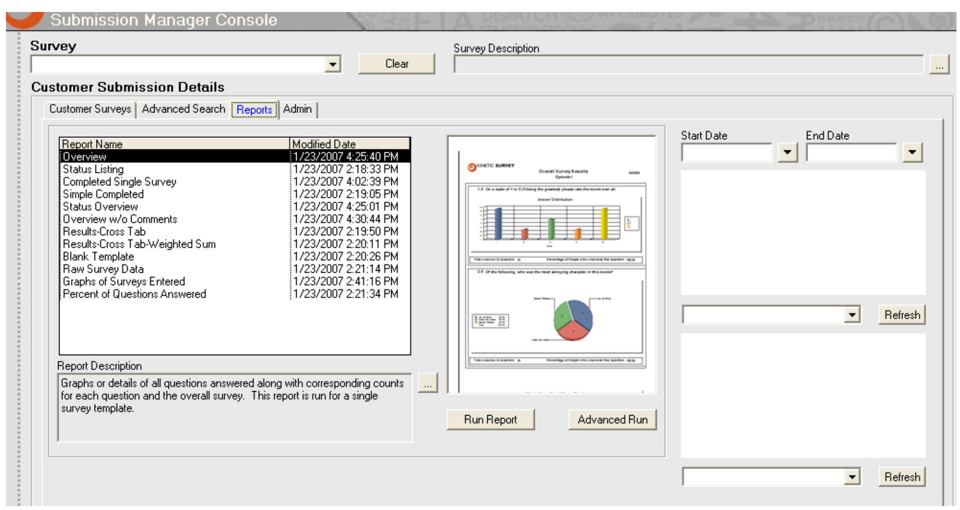


Figure 157: Reports

Reporting is discussed in it’s own chapter. See Request Reporting.

FLASHBOARDS

Kinetic Request comes with pre-configured Flashboards included on the right side of the **Submission Manager Console Reports Tab**.

Using Remedy's Flashboard products, these graphical reports run, constantly, reporting average scores, the quantity of completed requests, and other helpful information in real time.

Chapter 7 REQUEST REPORTING

Kinetic Request comes with a number of reports created to view request results in various forms. These are Crystal Reports using the Remedy Open Database Connectivity (ODBC) driver. Using the Crystal Reports Developer tool (licensed separately), customize or copy these reports as needed. This chapter includes the following procedures:

- Setting Up the Report Server—Before running reports, verify that a Report Server is correct.
- Running Reports—To run reports, follow this procedure.

SETTING UP THE REPORT SERVER

So that Kinetic Request can access its reports, you must establish the report server using the Remedy toolbar functions, for each user.

Note: If you are using a preference server, this information is updated automatically.

SET UP THE REPORT SERVER USER TOOL:

1. From the Remedy toolbar, select **Tools**.

1. Select **Options**.

2. Select the **Advanced** tab.

3. In the Reports section of the Advanced tab, in the **Report Server** field, verify or type the name of the server on which the reports are stored. If you do not know your report server name, see your Remedy adminsitrator.

4. Be sure to check the **ODBC Use Underscores** option. All Kinetic Request reports use this option and will not function without this checked.

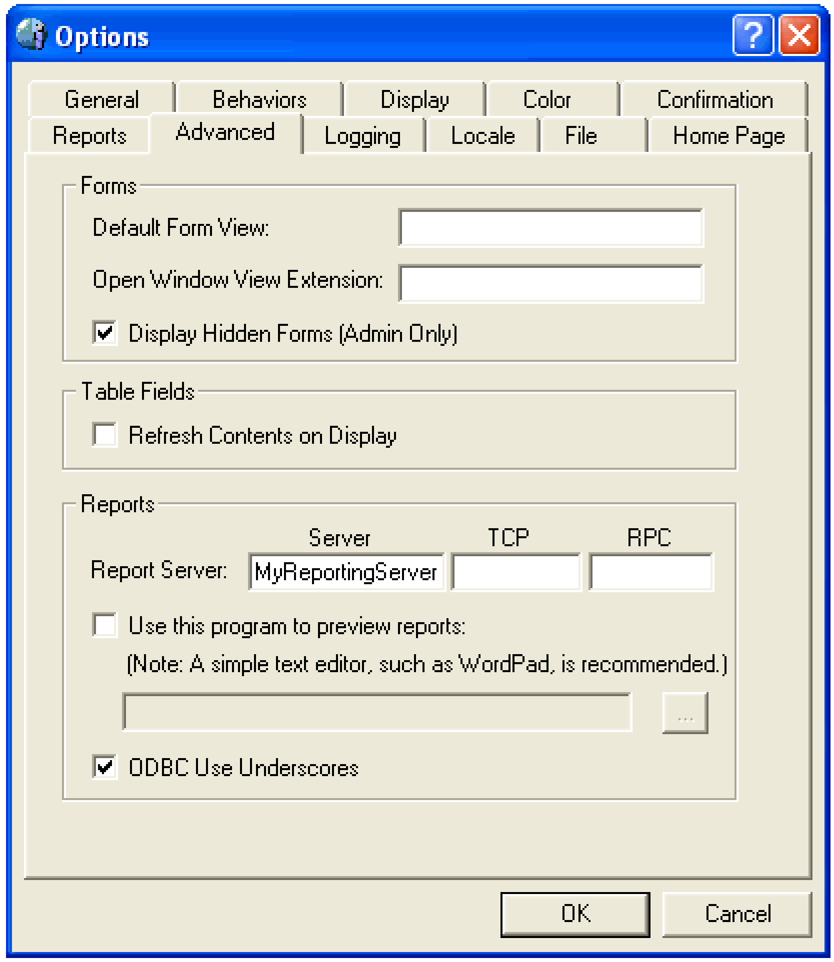


Figure 158: Report Server

RUNNING REPORTS

Running reports can be done in two ways. Running reports from the Reports tab on the Service Catalog Console will run reports specific to the Request Template you are working with.

Running a report from the Global Reporting Dialog allows users to run reports across requests.

To access the *Service Catalog Console*, see Accessing the Request Manager.

RUN A REPORT:

1. Access the Request Manager.

2. Highlight the name of the request template.

3. In the *Service Items Description* section of the screen, select the **Reports** tab. The list of reports appears.

4. Highlight the name of the report to run.

   A description of that report appears along with a thumbnail of the report.

5. Click **Run Report**. The report will run against all of the request responses for the highlighted items.

ADVANCED REPORT CONSOLE

The Advanced Report Console allows users to run the standard reports but with additional parameters.

OPEN ADVANCED REPORT CONSOLE-GLOBAL

1. Access the Request Manager.

2. From the left column, select **Global Reporting**.

3. The Advanced Report Console displays.

OPEN ADVANCED REPORT CONSOLE –SELECTED REQUEST TEMPLATE

1. Access the Request Manager.

2. Highlight the name of the request template.

3. In the *Service Item Details* section of the screen, select the **Reports** tab. The list of reports appears.

4. Highlight the name of the report to run.

A description of that report appears along with a thumbnail of the report.

5. Click **Advanced Run**.

6. The Advanced Report Console appears.

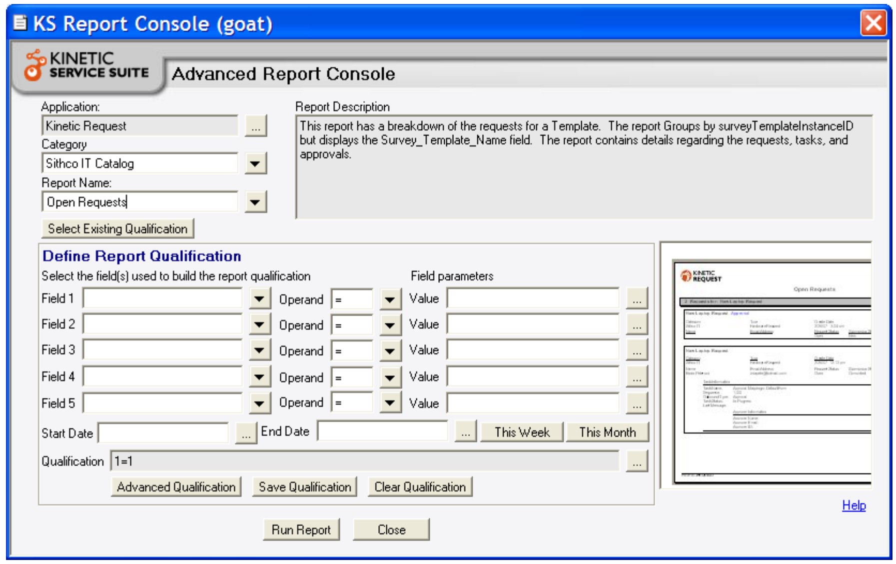


Figure 159: Advanced Report Console

USING THE ADVANCED REPORT CONSOLE

The Advanced Report Console has a number of features and options. This section is designed to explain what each is for and how to use them.

The following table lists all of the fields and buttons on the console with a brief description of each one.

Table 16: Advanced Report Console Description

Field Name	Description
Application	This field is always pre-populated with "Kinetic Request" when the console is opened.
Category	If this field is pre-populated, it cannot be changed. If it is not then you can select a Request category from the drop-down menu.
Report Name	If this field is pre-populated, it cannot be changed. If it is not then you can select a Report from the drop-down menu.
Select Existing Qualification button	Opens the Saved Search dialog window, which allows you to select a saved search qualification for the current report.
Field 1 – Field 5	Select any field from the form that this report uses

Field Name	Description
	from the drop-down menu.
Operand	Select one of the following values from the drop-down menu: LIKE = (equal) != (not equal) > (greater than) < (less than) >= (greater than or equal) <= (less than or equal)
Value	Enter any value that you want to compare the field to. If you leave this field blank it will consider the field to be null
Start Date	This field is only available if the report you are using is set up to use a date range when running the report. The option is set up when creating a report using the Report Manager. When using this field, enter the beginning date of the range that you want the report to run through.
End Date	This field is the same as the Start Date field listed above except that you would enter the end date of the range you are reporting against.
This Week button	Populates the Start Date with the current date and time and the End Date with the date and time exactly seven days later.
This Month button	Populates the Start Date with the first date of the current month beginning at 12:00 AM and the End Date with the current date and time.
Qualification	Holds the actual qualification that will be used to run the report. It is generated as you populate the values mentioned above as well as when you click the Run Report button.
Advanced Qualification button	Calls the Advanced Qualification dialog window.
Save Qualification button	Calls the Save Qualification dialog window. See below.

Field Name	Description
Clear Qualification button	Clears the contents of the Qualification, Field, Operand, Value and date fields.
Show Embedded button	Opens a dialog window that displays the embedded qualification of the current report. This qualification is set when creating the report in the Report Manager and is a property of the report. Not all reports are required to have this field and if they do not the button is not displayed.
Send To	Displays the destination of the report. You can choose Screen (default), File or Printer
Run Report button	Runs the report using whatever qualifications are in the Qualification field. If the field is empty it will run the report wide open with the exception of the embedded qualification if it is present.
Close button	Closes the Advanced Report Console.

Saved Searches

Once you create a search string by selecting values for the Field, Operand and Value fields, you can save that information into a saved search.

Create a Saved Search

1. Click the **Save Qualification** button. The Save Qualification dialog window opens.
2. Enter a new name for the qualification in the Qualification Name field

   -Or-

3. Select the name of an existing qualification you wish to update or overwrite.
4. Set the Default Search option to yes or no. If you wish for this search to be populated in the Advanced Report Console every time this specific report is selected select “Yes”. Otherwise select “No”.
5. Click the **Save** button.

Figure 160: Save Qualification dialog window

NOTE

You can also use this method to delete saved searches. Just follow the first two steps and for the third step click the **Delete Qualification** button instead. Then click the **Close** button to close the dialog window.

USE A SAVED SEARCH

1. Click the Select Exisiting Qualification button. The Existing Qualifications dialog opens.

2. Highlight the existing search qualification from the table that you wish to use.

3. Click the **Use Qualification** button.

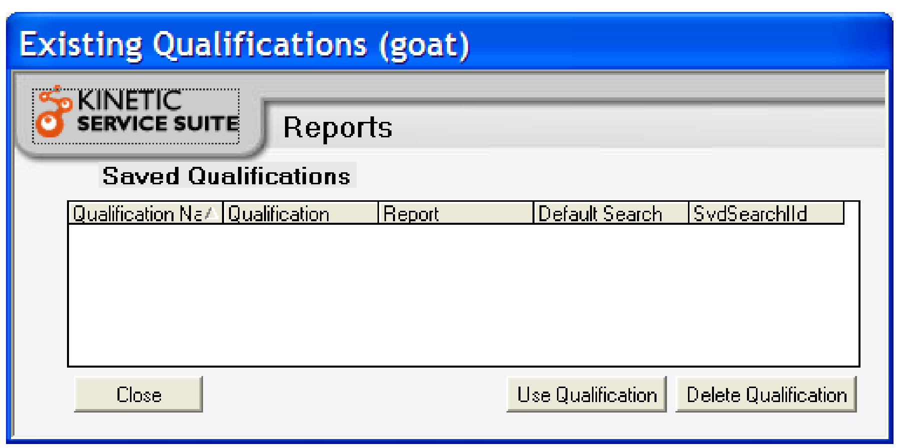


Figure 161: Existing Qualifications dialog window

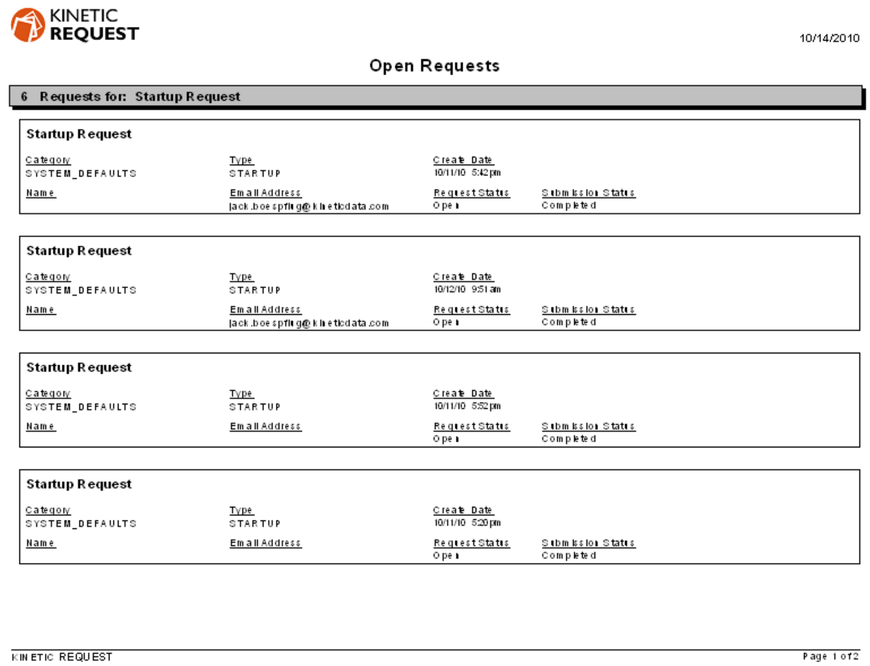
Standard Reports

Kinetic Data provides these standard reports:

Table 17: Report Descriptions

Report Name	Description
Open Requests	Open Request for selected Service Item
Requests Created - Company/Business Unit	All Request for the selected Service Item grouped by company ID/Company Name
Requests Created - Person	All Request for the selected Service Item grouped by person based on the email address
Requests Created - Template	All Request for the selected Service Item
Service Catalog - Details	Information about all the Service Items in a service catalog
Service Catalog - Summary	Summary of all the Service Items in a service catalog
Simple Completed - Requests	Includes all questions and answers for individual requests
Service Items by Volume	Includes a Cross tab will display a Count of the number of Requests and Approvals per Service Item.
Requests and Approvals Closed by Month Graphs	Displays a Graph using the Request Closed Date and displays how many Requests and Approvals were closed each Month (displays the 1st day of the week).
Requests and Approvals Closed by Week Graphs	Displays a Graph using the Request Closed Date and displays how many Requests and Approvals were closed each Week (displays the day of the week).

Report Name	Description
Requests and Approvals Closed by Year Graphs	Displays a Graph using the Request Closed Date and displays how many Requests and Approvals were closed each Year (displays the Month and Year).
Requests and Approvals Created by Month Graphs	Displays a Graph using the Create Date and displays how many Requests and Approvals were Created each Month (displays the 1st day of the week).
Requests and Approvals Created by Week Graphs	Displays a Graph using the Create Date and displays how many Requests and Approvals were Created each Week (displays the day of the week).
Requests and Approvals Created by Year Graphs	Displays a Graph using the Create Date and displays how many Requests and Approvals were Created each Year (displays the Month and Year).
RawRequestData	Designed to export the results from Crystal to Excel. Use the export facility from the built in Crystal Viewer to export the report in a CSV format. This allows you to import the data into the tool of your choice.



KINETIC REQUEST

10/14/2010

Open Requests

6 Requests for: Startup Request

Startup Request

Category	Type	Create Date	
SYSTEM_DEFAULTS	STARTUP	10/11/10 5:42 pm	
Name	**Email Address**	**Request Status**	**Submission Status**
	jack.boespflug@kineticdata.com	Open	Completed

Startup Request

Category	Type	Create Date	
SYSTEM_DEFAULTS	STARTUP	10/12/10 9:51 am	
Name	**Email Address**	**Request Status**	**Submission Status**
	jack.boespflug@kineticdata.com	Open	Completed

Startup Request

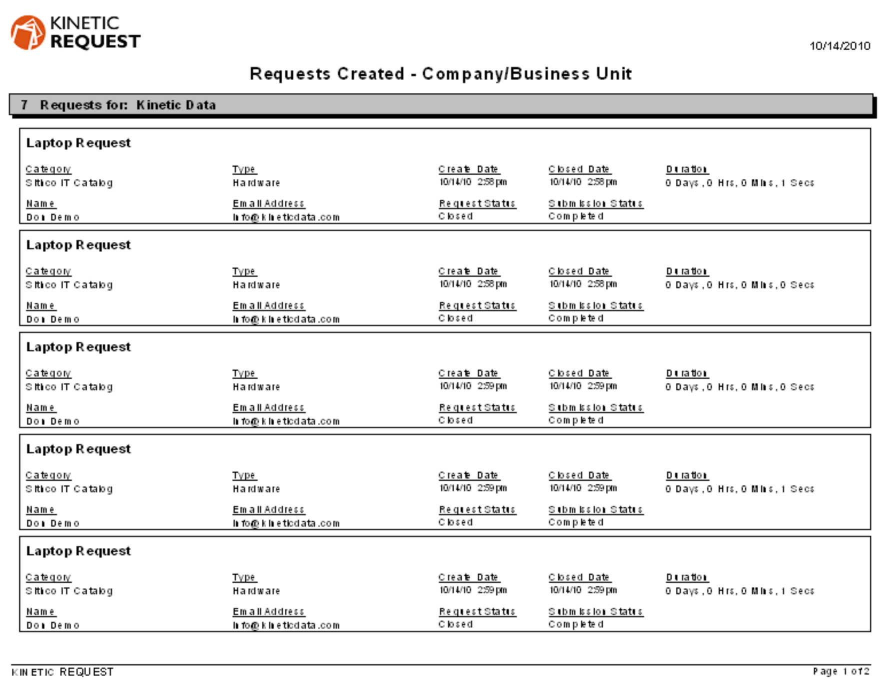
Category	Type	Create Date	
SYSTEM_DEFAULTS	STARTUP	10/11/10 5:52 pm	
Name	**Email Address**	**Request Status**	**Submission Status**
		Open	Completed

Startup Request

Category	Type	Create Date	
SYSTEM_DEFAULTS	STARTUP	10/11/10 5:20 pm	
Name	**Email Address**	**Request Status**	**Submission Status**
		Open	Completed

KINETIC REQUEST Page 1 of 2

Figure 162: Sample Open Requests Report



KINETIC REQUEST

10/14/2010

Requests Created - Company/Business Unit

7 Requests for: Kinetic Data

Laptop Request

Category	Type	Create Date	Closed Date	Duration
Sitico IT Catalog	Hardware	10/14/10 2:58 pm	10/14/10 2:58 pm	0 Days, 0 Hrs, 0 Mins, 1 Secs
Name	**Email Address**	**Request Status**	**Submission Status**	
Don Demo	info@kineticdata.com	Closed	Completed	

Laptop Request

Category	Type	Create Date	Closed Date	Duration
Sitico IT Catalog	Hardware	10/14/10 2:58 pm	10/14/10 2:58 pm	0 Days, 0 Hrs, 0 Mins, 0 Secs
Name	**Email Address**	**Request Status**	**Submission Status**	
Don Demo	info@kineticdata.com	Closed	Completed	

Laptop Request

Category	Type	Create Date	Closed Date	Duration
Sitico IT Catalog	Hardware	10/14/10 2:59 pm	10/14/10 2:59 pm	0 Days, 0 Hrs, 0 Mins, 0 Secs
Name	**Email Address**	**Request Status**	**Submission Status**	
Don Demo	info@kineticdata.com	Closed	Completed	

Laptop Request

Category	Type	Create Date	Closed Date	Duration
Sitico IT Catalog	Hardware	10/14/10 2:59 pm	10/14/10 2:59 pm	0 Days, 0 Hrs, 0 Mins, 1 Secs
Name	**Email Address**	**Request Status**	**Submission Status**	
Don Demo	info@kineticdata.com	Closed	Completed	

Laptop Request

Category	Type	Create Date	Closed Date	Duration
Sitico IT Catalog	Hardware	10/14/10 2:59 pm	10/14/10 2:59 pm	0 Days, 0 Hrs, 0 Mins, 1 Secs
Name	**Email Address**	**Request Status**	**Submission Status**	
Don Demo	info@kineticdata.com	Closed	Completed	

KINETIC REQUEST Page 1 of 2

Figure 163: Sample Requests Created – Company/Business Unit Report

KINETIC REQUEST

10/14/2010

Requests Created - Person

7 Requests for: info@kineticdata.com

Laptop Request

Category	Type	Create Date	Closed Date	Duration
Sithco IT Catalog	Hardware	10/14/10 2:58 pm	10/14/10 2:58 pm	0 Days, 0 Hrs, 0 Mins, 1 Secs
Name	**Email Address**	**Request Status**	**Submission Status**	
Don Demo	info@kineticdata.com	Closed	Completed	

Laptop Request

Category	Type	Create Date	Closed Date	Duration
Sithco IT Catalog	Hardware	10/14/10 2:58 pm	10/14/10 2:58 pm	0 Days, 0 Hrs, 0 Mins, 0 Secs
Name	**Email Address**	**Request Status**	**Submission Status**	
Don Demo	info@kineticdata.com	Closed	Completed	

Laptop Request

Category	Type	Create Date	Closed Date	Duration
Sithco IT Catalog	Hardware	10/14/10 2:59 pm	10/14/10 2:59 pm	0 Days, 0 Hrs, 0 Mins, 0 Secs
Name	**Email Address**	**Request Status**	**Submission Status**	
Don Demo	info@kineticdata.com	Closed	Completed	

Laptop Request

Category	Type	Create Date	Closed Date	Duration
Sithco IT Catalog	Hardware	10/14/10 2:59 pm	10/14/10 2:59 pm	0 Days, 0 Hrs, 0 Mins, 1 Secs
Name	**Email Address**	**Request Status**	**Submission Status**	
Don Demo	info@kineticdata.com	Closed	Completed	

Laptop Request

Category	Type	Create Date	Closed Date	Duration
Sithco IT Catalog	Hardware	10/14/10 2:59 pm	10/14/10 2:59 pm	0 Days, 0 Hrs, 0 Mins, 1 Secs
Name	**Email Address**	**Request Status**	**Submission Status**	
Don Demo	info@kineticdata.com	Closed	Completed	

KINETIC REQUEST Page 1 of 2

Figure 164: Sample Requests Created – Person Report

KINETIC REQUEST

10/14/2010

Requests Created - Template

7 Requests for: Laptop Request

Laptop Request

Category	Type	Create Date	Closed Date	Duration
Sithco IT Catalog	Hardware	10/14/10 2:58 pm	10/14/10 2:58 pm	0 Days, 0 Hrs, 0 Mins, 1 Secs
Name	**Email Address**	**Request Status**	**Submission Status**	
Don Demo	info@kineticdata.com	Closed	Completed	

Laptop Request

Category	Type	Create Date	Closed Date	Duration
Sithco IT Catalog	Hardware	10/14/10 2:58 pm	10/14/10 2:58 pm	0 Days, 0 Hrs, 0 Mins, 0 Secs
Name	**Email Address**	**Request Status**	**Submission Status**	
Don Demo	info@kineticdata.com	Closed	Completed	

Laptop Request

Category	Type	Create Date	Closed Date	Duration
Sithco IT Catalog	Hardware	10/14/10 2:59 pm	10/14/10 2:59 pm	0 Days, 0 Hrs, 0 Mins, 0 Secs
Name	**Email Address**	**Request Status**	**Submission Status**	
Don Demo	info@kineticdata.com	Closed	Completed	

Laptop Request

Category	Type	Create Date	Closed Date	Duration
Sithco IT Catalog	Hardware	10/14/10 2:59 pm	10/14/10 2:59 pm	0 Days, 0 Hrs, 0 Mins, 1 Secs
Name	**Email Address**	**Request Status**	**Submission Status**	
Don Demo	info@kineticdata.com	Closed	Completed	

Laptop Request

Category	Type	Create Date	Closed Date	Duration
Sithco IT Catalog	Hardware	10/14/10 2:59 pm	10/14/10 2:59 pm	0 Days, 0 Hrs, 0 Mins, 1 Secs
Name	**Email Address**	**Request Status**	**Submission Status**	
Don Demo	info@kineticdata.com	Closed	Completed	

KINETIC REQUEST Page 1 of 2

Figure 165: Sample Requests Created – Template Report

KINETIC REQUEST

10/14/2010

Service Catalog - Details

Sithco IT Catalog

Attribute Information

Hardware

Laptop Request (Request a new laptop. Approval required.)

Create Date:	3/1/2007 12:38:56AM
Requests Submitted:	7
Last Submission:	10/14/2010 2:59:56PM
Attribute Information:	Category: Top Five Service Items Category: Computer Hardware

Peripheral Request (PC) (Add a short description for users here.)

Create Date:	5/1/2007 12:27:31AM
Requests Submitted:	0
Last Submission:	
Attribute Information:	

People

Training Room Reservation (Request for training room in bldg 6 or 8.)

Create Date:	4/30/2007 11:56:40PM
Requests Submitted:	0
Last Submission:	
Attribute Information:	Category: Top Five Service Items

Create Sithco User (Add a short description for users here.)

Create Date:	5/1/2007 2:46:27AM
Requests Submitted:	0
Last Submission:	
Attribute Information:	

Public

Improve Our Service (Help improve our service. Will automatically be linked to a service item, if accessed from a form.)

Create Date:	2/28/2007 3:48:46AM
Requests Submitted:	0
Last Submission:	
Attribute Information:	Category: Top Five Service Items

KINETIC REQUEST Page 1 of 3

Figure 166: Sample Service Catalog - Details Report

KINETIC REQUEST

10/14/2010

Service Catalog - Summary

Sithco IT Catalog

Hardware

Service Item	Description
Laptop Request	Request a new laptop. Approval required.
Peripheral Request (PC)	Add a short description for users here.

People

Service Item	Description
Training Room Reservation	Request for training room in bldg 6 or 8.
Create Sithco User	Add a short description for users here.

Public

Service Item	Description
Improve Our Service	Help improve our service. Will automatically be linked to a service item, if accessed from a form.

Software

Service Item	Description
PC Software Request	Request basic PC software.

Template

Service Item	Description
Template - No Approval	Add a short description for users here.
Template w/Inline Approval	Add a short description for users here.

SYSTEM_DEFAULTS

CONFIRMATION_PAGE

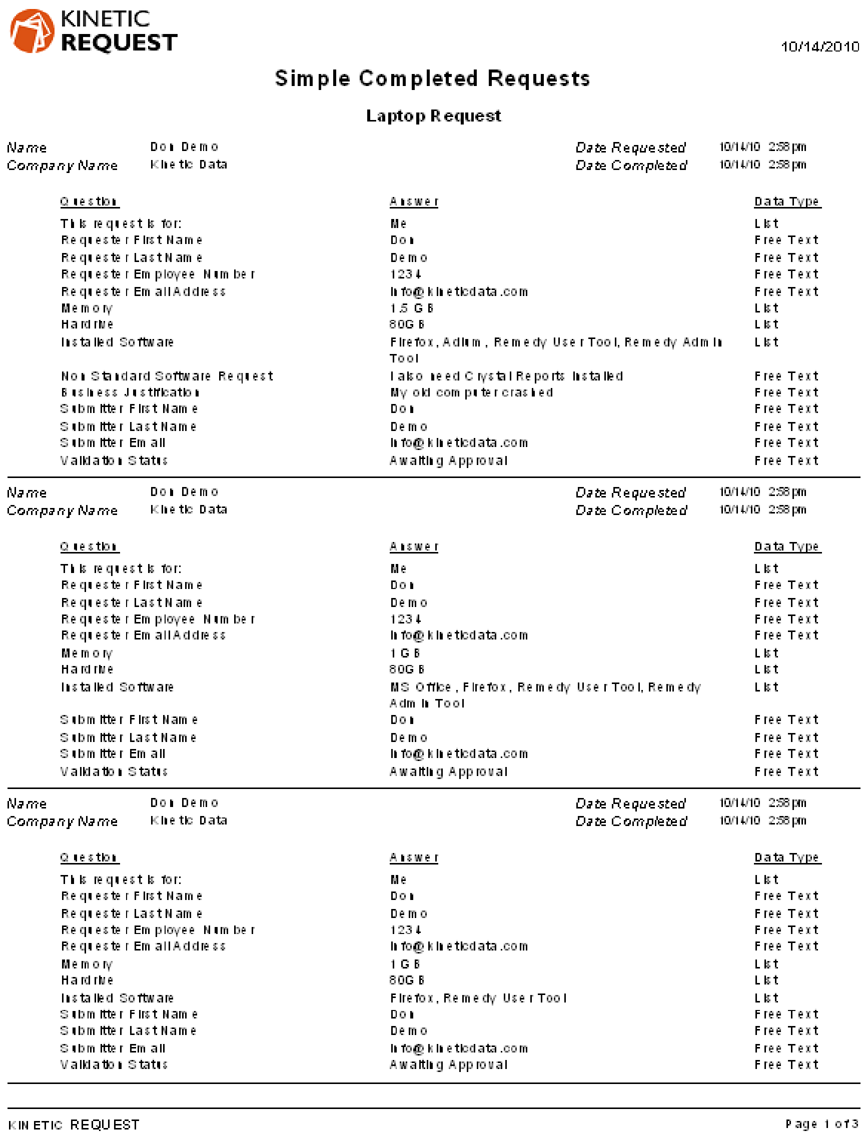
Service Item	Description
Default Confirmation Page - Request	Default Confirmation Page - Request

DATES

Service Item	Description
Locale Specific Dates-Request	Use this to set dates for other locales

KINETIC REQUEST Page 1 of 2

Figure 167: Sample Service Catalog - Summary Report



KINETIC REQUEST

10/14/2010

Simple Completed Requests

Laptop Request

Name	Don Demo	*Date Requested*	10/14/10 2:58 pm
Company Name	Kinetic Data	*Date Completed*	10/14/10 2:58 pm

Question	Answer	Data Type
This request is for:	Me	List
Requester First Name	Don	Free Text
Requester Last Name	Demo	Free Text
Requester Employee Number	1234	Free Text
Requester Email Address	info@kineticdata.com	Free Text
Memory	1.5 GB	List
Hardrive	80GB	List
Installed Software	Firefox, Adium, Remedy User Tool, Remedy Admin Tool	List
Non Standard Software Request	I also need Crystal Reports installed	Free Text
Business Justification	My old computer crashed	Free Text
Submitter First Name	Don	Free Text
Submitter Last Name	Demo	Free Text
Submitter Email	info@kineticdata.com	Free Text
Validation Status	Awaiting Approval	Free Text

Name	Don Demo	*Date Requested*	10/14/10 2:58 pm
Company Name	Kinetic Data	*Date Completed*	10/14/10 2:58 pm

Question	Answer	Data Type
This request is for:	Me	List
Requester First Name	Don	Free Text
Requester Last Name	Demo	Free Text
Requester Employee Number	1234	Free Text
Requester Email Address	info@kineticdata.com	Free Text
Memory	1 GB	List
Hardrive	80GB	List
Installed Software	MS Office, Firefox, Remedy User Tool, Remedy Admin Tool	List
Submitter First Name	Don	Free Text
Submitter Last Name	Demo	Free Text
Submitter Email	info@kineticdata.com	Free Text
Validation Status	Awaiting Approval	Free Text

Name	Don Demo	*Date Requested*	10/14/10 2:58 pm
Company Name	Kinetic Data	*Date Completed*	10/14/10 2:58 pm

Question	Answer	Data Type
This request is for:	Me	List
Requester First Name	Don	Free Text
Requester Last Name	Demo	Free Text
Requester Employee Number	1234	Free Text
Requester Email Address	info@kineticdata.com	Free Text
Memory	1 GB	List
Hardrive	80GB	List
Installed Software	Firefox, Remedy User Tool	List
Submitter First Name	Don	Free Text
Submitter Last Name	Demo	Free Text
Submitter Email	info@kineticdata.com	Free Text
Validation Status	Awaiting Approval	Free Text

KINETIC REQUEST Page 1 of 3

Figure 168: Sample Simple Completed - Requests Report

KINETIC REQUEST

10/14/2010

Service Items by Volume

Category, Type, Service Item	Request	Total
Sltico IT Catalog, Hardware, Laptop Request	7	7
SYSTEM_DEFAULTS, STARTUP, Startup Request	7	7
Sltico IT Catalog, Software, PC Software Request	4	4
Total	18	18

KINETIC REQUEST Page 1 of 1

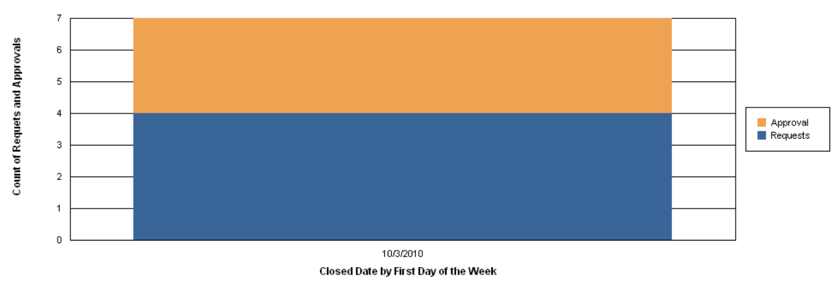
Figure 169: Sample Service Items by Volume Report

KINETIC REQUEST

10/14/2010

Requests and Approvals Closed by Month Graphs

October 2010



	Approval	Requests	Total
10/3/2010	3	4	7
Total	3	4	7

KINETIC REQUEST Page 1 of 2

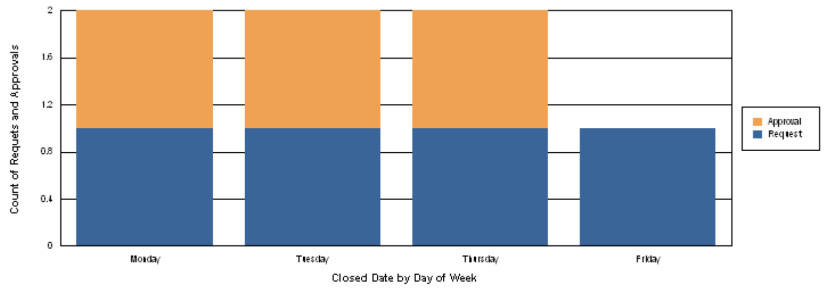
Figure 170: Sample Requests and Approvals Closed by Month Graphs Report

KINETIC REQUEST

10/14/2010

Requests and Approvals Closed by Week Graphs

10/03/2010



	Request	Approval	Total
Monday	1	1	2
Tuesday	1	1	2
Thursday	1	1	2
Friday	1	0	1
Total	4	3	7

KINETIC REQUEST Page 1 of 2

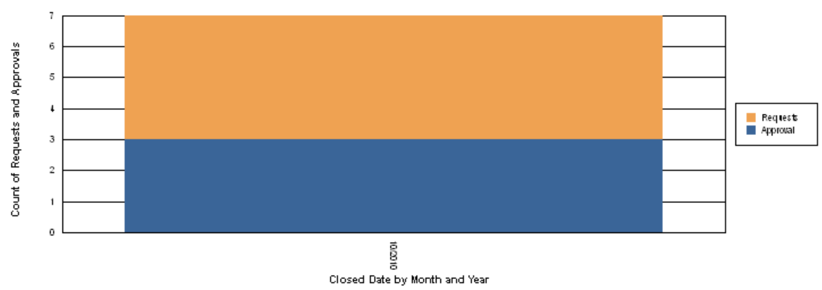
Figure 171: Sample Requests and Approvals Closed by Week Graphs Report

KINETIC REQUEST

10/14/2010

Requests and Approvals Closed by Year Graphs

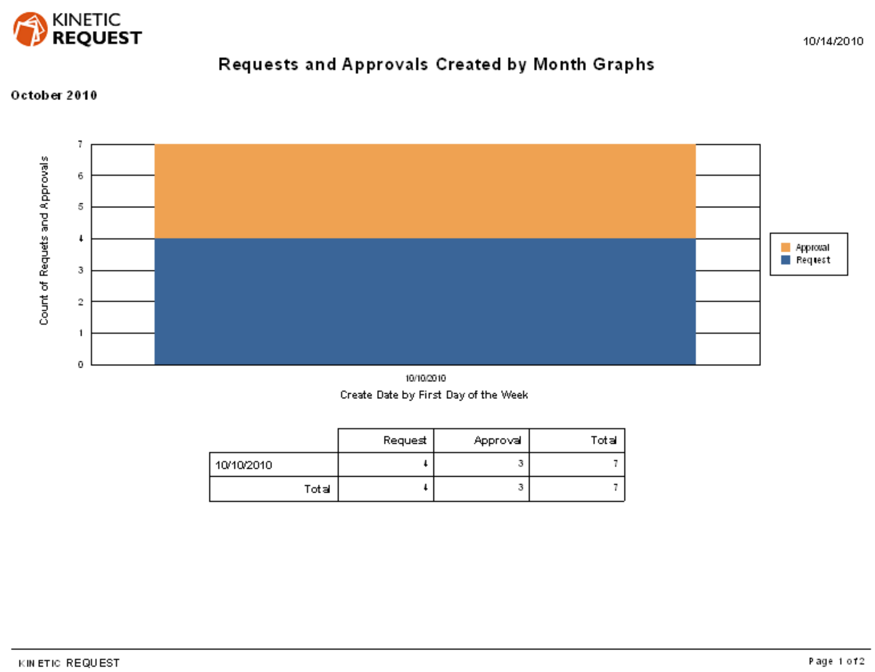
2010



	Approval	Requests	Total
October 2010	3	4	7
Total	3	4	7

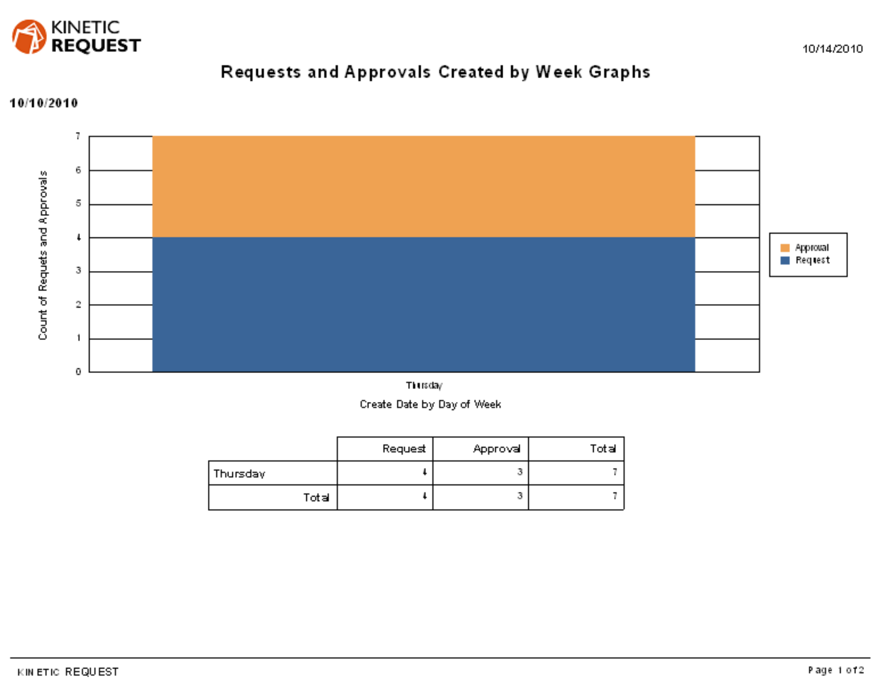
KINETIC REQUEST Page 1 of 2

Figure 172: Sample Requests and Approvals Closed by Year Graphs Report



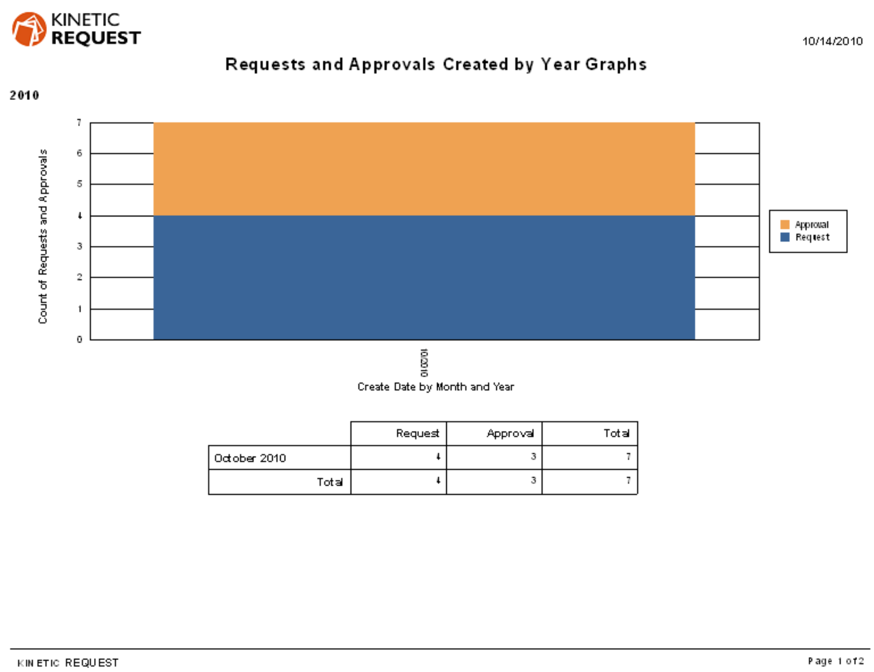
	Request	Approval	Total
10/10/2010	4	3	7
Total	4	3	7

Figure 173: Sample Requests and Approvals Created by Month Graphs Report



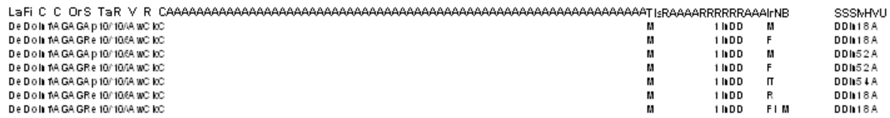
	Request	Approval	Total
Thursday	4	3	7
Total	4	3	7

Figure 174: Sample Requests and Approvals Created by Week Graphs Report



	Request	Approval	Total
October 2010	4	3	7
Total	4	3	7

Figure 175: Sample Requests and Approvals Created by Week Graphs Report



LaFi C C OrS TaR V R CAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAT	IsRAAAARRRRRRAAAIrNB			SSSMHVU
De Doln 1AGAGAp 10/10/A wC lbC	M	1 lhDD	M	DDlh18A
De Doln 1AGAGRe 10/10/A wC lbC	M	1 lhDD	F	DDlh18A
De Doln 1AGAGAp 10/10/A wC lbC	M	1 lhDD	M	DDlh52A
De Doln 1AGAGRe 10/10/A wC lbC	M	1 lhDD	F	DDlh52A
De Doln 1AGAGAp 10/10/A wC lbC	M	1 lhDD	IT	DDlh54A
De Doln 1AGAGRe 10/10/A wC lbC	M	1 lhDD	R	DDlh18A
De Doln 1AGAGRe 10/10/A wC lbC	M	1 lhDD	FI M	DDlh18A

Figure 176: Sample RawRequestData Report

CUSTOM REPORTS

More reports can be created in Crystal Reports® by SAP BUSINESSOBJECTS. and BMC Remedy Action Request System internal reports. Please see your Crystal Reports and BMC Remedy documentation.

Chapter 8 FORCE PASSWORD CHANGE

NEW IN VERSION 5.0.2

The force password change form was added in Kinetic Request v5.0.2.

OVERVIEW

If the ARS server uses the built-in password management functionality (ARS V7.1 and greater), Kinetic Request can integrate to this functionality and require that users change their ARS password when they login to Kinetic Request.

PASSWORD VALIDATIONS

By default, not all of the built-in password validations are enforced. This is because the default validations are enforced with active links, and there is no way to trigger these active links from Kinetic Request.

DEFAULT VALIDATIONS

The following validations are performed in the application by default:

1. Confirm the AR Login is not null or blank
2. Confirm the AR Login matches the value the user logged in with
3. Confirm the current password matches the password in the user record
4. Confirm the new password is not null or blank
5. Confirm the new password matches the new password confirmation
6. Confirm the new password does not match the current password

CUSTOM VALIDATIONS

The following active links can be duplicated as Remedy filters to enforce additional rules:

1. User Password Change:CheckEnforcePolicyAndRestrictions
2. User Password Change:GetPasswordLength

3. User Password Change:EnforceHIPARules
4. User Password Change:DisableSpecialCharacterRestriction
5. User Password Change:EnforceHIPASpecialCharacters
6. User Password Change:EnforceCustomQualifier

THEMES

The default Force Password Change service item is located in the SYSTEM DEFAULTS catalog. This service item is used if the catalog does not contain a service item named "Force Password Change". The default form is very basic and doesn't contain a company logo or any specialized styling.

If your catalog requires a different theme, or a different look and feel, then you should clone the Force Password Change service item in the SYSTEM DEFAULTS catalog into your catalog. Then you can apply any styling changes you need to fit your catalog theme. Other catalogs will simply use the system default service item unless they too contain a service item named Force Password Change.