Getting Started Using the WorkRequest (WR) Client

Overview of the WorkRequest (WR) Client

WorkRequest (WR) is a system used for managing work requests. It is a third-party application that has been highly customized and is owned and supported by the IT department. WorkRequest has a client application that the writing group uses to manage the work requests submitted to us by our customers. WorkRequest also has a web version that enables customers to view WR records without having to install the WR client. See the procedure for **Using WorkRequest Web**.

Note: In the system, the WorkRequest records have many tabs that are not used and will not contain any information related to the work request.

The work request submission form that is available on the writing group's SharePoint site is a front-end web interface to a WR work request. Customers do not need to install the WorkRequest client or interact with WR in any way except through the web version of the work request submission form. Technical writers who will be assigned work requests need to install the WorkRequest client and will be using it to track all information pertaining to completion of the work request.

A WR record can be viewed by all team members and is used by customers and managers to track various metrics, including project turnaround time; breakdown of cases by product family, project type, or department/group; and case completion rates.

Finding Support for Using WorkRequest

WorkRequest (WR) is supported and maintained by the IT department. Any defects or bugs related to the application must be reported to them.

For help using the application, send an e-mail to **John Doe** (**jdoe@acme.com**), or call him at x1234. Although John is the main contact for WorkRequest, any member of the writing group can answer questions in his absence. Send an e-mail to **writing_group@acme.com**, if needed.

Note: The WR client does have an embedded help file; however, because the application has been so highly customized, the help is not very much help.

Procedures for using the WorkRequest client are available on the SharePoint site. Use the alias, **writinggroup**, to view the Web site.

Requesting a WorkRequest Client User Account

Before you can install the WorkRequest (WR) client, you need to request a WR user account.

To request a WR user account

1. In the **Address** field of your browser, type the following URL: **http://production/workrequestclient/workrequest_install_instructions.htm**. The WorkRequest Installation Instructions web page displays.
2. Under the **Request A WorkRequest User Account** heading, click **WorkRequest New User Request Form**. The WorkRequest New WorkRequest User page displays.
3. In the **Username** field, validate that your username displays.
4. Click **Submit**. Your new user account request is sent to the IT department. You will receive notification when your WorkRequest account has been created.

Note: All WorkRequest user accounts are created without a password. Passwords are maintained via the E-Mail Management System. After you receive notification that your WorkRequest account has been created, please wait 30 minutes, and then set your password using the E-Mail Management System.

Installing the WorkRequest Client

After you receive notification that your WorkRequest (WR) user account was created and you set your WR password to match your current NT password, you can install the WR client. You must install WR from the **Application Installation Web Site**.

Note: The WR installation may take up to 30 minutes, so plan your installation when you don't need your computer for some time.

To install the WorkRequest client

1. In the **Address** field of your browser, type the alias, **AppInstall**. The Application Installation Web Site home page displays.
2. In the **Search** field, type **workrequest**, and then click **Search**. The Results page displays.
3. In the **Install** column, select the check box next to **WorkRequest Client**.
4. Click **Next**. The application installs.

Note: You do not need to reboot your computer after the WorkRequest installation process; it will be available immediately from your Start menu.

Using the WorkRequest Client to Manage Work Requests

The WorkRequest (WR) client is used by technical writers to manage work requests submitted by customers. A WR record contains all the information about a work request, including the following:

- Project description and requirements of the work to be done
- Links to all project-related files
- Requested publication date
- Pertinent communications and notes about the work request
- Informal project status information
- Usernames of the work request contact, owner, and project reviewers

A WR record can be viewed by all team members and is used by customers and managers to track various metrics, including project turnaround time; breakdown of cases by product family, project type, or department/group; and case completion rates.

Logging in to the WorkRequest Client

After you install the WorkRequest (WR) client, it is available from your Start menu.

Note: All WorkRequest user accounts are created without a password. Passwords are maintained via the E-Mail Management System. After you receive notification that your WorkRequest account has been created, please wait 30 minutes, and then set your password using the E-Mail Management System.

To log in to the WorkRequest client

1. From your desktop, click **Start > All Programs > Work Request Software > WorkRequest**. The WorkRequest Login dialog box displays.
2. In the **User Name** field, verify your username displays.
3. In the **Password** field, type your NT password.
4. In the **Database** field, verify that ISTRK: Information Systems displays.
5. Click **OK**. The WorkRequest – ISTRK Information Systems Tracking client application displays.

Creating New WorkRequest Records

The Work Request form that is available from the SharePoint site is a front-end web interface to a WorkRequest (WR) work request. When customers submit the form, it automatically generates a WR. When needed, you can create a WR record directly from the WR client.

To create a new WorkRequest record

1. Log in to the WorkRequest client. The WorkRequest client application displays.
2. From the toolbar, click **New ChangeRequest**. The Submit ChangeRequest form displays.

Note: Fields that are required to be completed display in red text. The record will not save until all required fields are completed.

3. From the **Request Type** drop-down list, select **Work Request**.
4. From the **Customer Severity** drop-down list, select **Normal**.
5. In the **Date Required** field, type the date when the work request needs to be published to a production location.
6. From the **Department** drop-down list, select **Corporate Communications**.
7. From the **Group** drop-down list, select **Publications**.
8. In the **Contact** field, type the username of the person who requested the work.
9. In the **Headline** field, type a descriptive title for this request that includes the following information:

    - New or Update
    - Document title
10. In the **Description** field, type a description of the project, including at least the following information:
    - Legal designation of the document, such as Preliminary, Preview, Advance, or Production
    - Confidentiality of the document (hide or show Confidentiality text when publishing)
    - Publishing instructions, such as publish to corporate web site, internal Web site, or secure Web site
    - Display instructions for revision history (hide or show revision history when publishing)
    - Links to the document source file (.zip)
    - Valid username or group name of the reviewer who needs to review and provide final publication approval
11. In the **CC List** field, type the valid username of the people who need to be notified when the case is submitted and closed.
12. Click the **Assignments** tab. The Assignment fields display.
13. From the **Owner** drop-down list, select the username of the person who will be completing the work request.
14. Click **OK**. The WR work request record is saved to the database.

Adding Notes to Work Request Records

A WorkRequest (WR) work request record is the plan of record for a project. Most of the information about a project needs to be added to the Notes tab of the actual WR record. Because the work request record is the plan of record, it is vital that any important information about the project be included on the Notes tab of the work request. Team members who want to know about a project can view the Notes tab and get a good understanding of the status of the project and review communication about the project.

Note: Make sure that you add the project description and project requirements to the Main tab, not the Notes tab of the work request record. For example, if the customer requests that the document be published to an internal site rather than the corporate web site, add the change in the Description field on the Main tab. Include the e-mail (or text from a conversation) from the customer requesting the change to the Notes tab so there is a record of the request.

You can add information to the Notes tab by typing the information directly in the field or by copying and pasting information from another location, such as an e-mail message.

To add a note to a work request record

1. Log in to the WorkRequest client. The WorkRequest client application displays.

Note: If the Workspace pane does not display, from the menu, click **View > Workspace**. The Workspace pane displays. You can toggle the Workspace on and off as needed.

2. Modify the work request record that you want to add a note to. The work request displays in an editable form.
3. Click the **Notes** tab. The New Note field displays in an editable form.
4. In the **New Note** field, add the information that you need to include with the record. You can paste URLs, copy text from e-mail, type a project summary, or type a note to yourself about what you need to do next.

Note: Do not attach documents to the record by copying the document directly in the Notes tab or anywhere in the record. The static copy of the file is saved directly to the WR database and uses too much space in the database. Instead, check the document into the document repository, and add the link to the Notes tab or to the Main tab, as needed.

5. Save the changes you made by clicking **Apply**. The changes are saved to the database, and the record redisplays in a read-only format.

Printing WorkRequest Records

Sometimes you may want a hard copy of the work request record that has been assigned to you. Printing a work request record will print all the information that is contained on any tab in the record.

To print a WorkRequest work request record

1. Log in to the WorkRequest client. The WorkRequest client application displays.
2. Find the WR record that you want to print. The WR work request record displays in a read-only format.
3. Click the **Attachment and Documents** tab.
4. From the bottom of the record, in the **Print URL** field, click the **URL**. The WorkRequest ChangeRequest Report displays in your web browser.
5. Click **File > Print**. The Print dialog box displays.
6. Click **Print**. The WR record prints to the designated printer.