WMS | WORK MANAGEMENT SYSTEM

Application Guide

State of North Dakota

INFORMATION TECHNOLOGY DEPARTMENT

June 8, 2006

Table of Contents

Introduction

- One stop shopping for Information Technology Department (ITD) Services
- Web Based application
- Allows for electronic attachments
- Notifications through email and work queue
- A work order is a description of a business need for department describing what work needs to be performed
- Service Request - The actual request for work to be performed by ITD or internally within the department. Service requests are requested from the work order
- Departments have the capability to manage their own work orders, service requests, and projects

General Information

- Asterisk (*)- This is a required field
- Please **DO NOT** use your browser's back, forward or refresh options to navigate applications. The buttons provided within the application need to be used (Attachment A)
- The application keeps status history of actions that affect the status of the various system processes
- Search features are available for Work Orders, Service Requests, Project Management, Assignments, and Time Entries
- **DO NOT** "Double Click" any buttons
- Error Messages – Refer to your agencies Lead Request Manager and if they are unable to solve the issue they will contact the ITD Help Desk

Administration

- Charge Code (Project codes) Validation
    - Ability to have system verify charge code (project code) information
- Divisions
    - Divisions can be entered into application and utilize divisions relating to work orders
- Service Groups
    - A service group is a group of individuals who process a service request
    - Individuals can be assigned to a service group
- System Configuration
    - Request Manager Feature
        - Suggested for occasional users or users with moderate work request activity
        - Request Manager creates the Work Order and Service Request
        - Determine if Service Request is internal to agency or submit to ITD for services.
    - End User Feature
        - End User or Request Manager creates the Work Order
        - Contact types utilized in the End User Feature:
            - End User
            - Supervisor (optional)
            - Request Manager
            - Director (optional)
        - Agency determines the level of approval for work orders.
        - Determine if the Service Request is internal to agency or is submitted to ITD for services.

Contacts

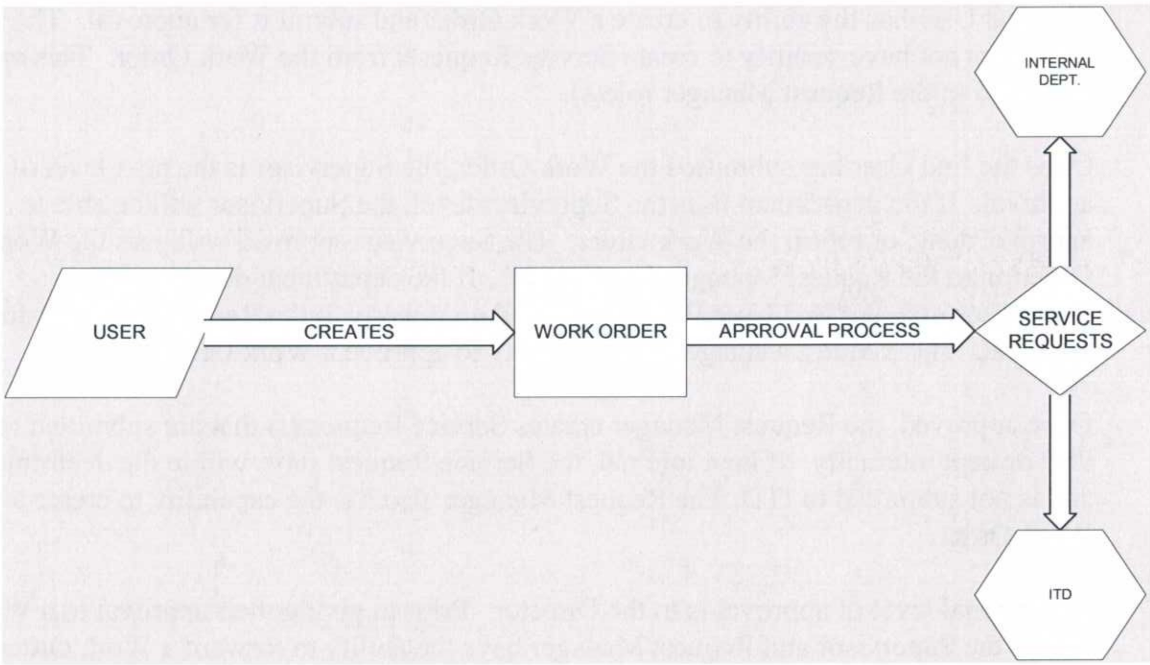
The Lead Request Manager has the capability to enter contact information, set the user's contact type and set service request level authority.

Contact Types

- Key WMS system contact types
  - End User - The department staff which initiates work orders to their Department and do not create service requests
  - Supervisor - The department supervisor that approves work created by end-user
  - Request Manager – The department IT staff that manages the work orders and creates related service requests, also can create work orders
  - Lead Request Manager - The department IT staff that has the abilities of a Request Manger and also has access to administer security and contact tables for their Department
  - Director - The department director who approves or denies work orders forwarded by Supervisor or Request Managers
- Informational contact types
  - Records Management
  - Agency Director
  - Web Administrator
  - Forms
  - Production Control
  - Micrographic Materials
  - GIS Administrator
- Password Verification - Allows individual to view password verification information

WMS Work Flow

- WMS typical work flow



Work Orders

- A work order is the initial component for initiating work
- Allows various levels of contact type to request work
- Allows for up to 3 levels of approval depending on department's administrative setup
- A Service Request is created from a Work Order
- Charge Code will be validated only if selected for validation in administrative setup
- The contact types of End User, Request Manager, and Lead Request manager are able to create work orders. or Request Managers

Work Order Approval Process

The End User approval process in WMS includes the following contact types: End User, Supervisor, Request Manager, and Director.

Work Orders are created within a department and allow for an approval process that can be tailored to the department. The four available levels of approval include End User, Supervisor, Request Manager, and Director.

The End User has the ability to create a Work Order and submit it for approval. The End User does not have security to create Service Requests from the Work Order. This option is limited to the Request Manager role(s).

Once the End User has submitted the Work Order, the Supervisor is the next level of approval. If the department uses the Supervisor level, the Supervisor will be able to approve, deny, or return the Work Order. The Supervisor approval will pass the Work Order on to the Request Manager for approval. If the department does not use a Supervisor role, the End User Work Order will go directly to the Request Manager for approval. The Request Manager has the ability to approve a Work Order.

Once approved, the Request Manager creates Service Request(s) that are submitted to ITD or kept internally. If kept internal, the Service Request stays within the department and is not submitted to ITD. The Request Manager also has the capability to create a Work Order.

An optional level of approval is to the Director. Prior to giving their approval to a Work Order, the Supervisor and Request Manager have the ability to forward a Work Order to a Director for approval. The Director then has the opportunity to approve, deny, or return the Work Order.

Service Requests

- A service request is the actual request for work to be performed by ITD or internally within department
- A service requests is initiated from a work order
- Multiple service requests are allowed per work order
- Service Requests can be completed within Department or submitted to ITD for work
- 32 different service requests are available
- Ability to copy narrative and attachments from the work order
- Service Request level approval
- Available selection of service requests is dependent on security access

Assignments

- Assignments are created at the service group or individual level
- Service Requests submitted to ITD have an automatic assignment to a service group, with the exception of ITD's Software Development.
- Estimate hours to request and allocate those hours through assignments
- Assigned individuals can request changes to their assignments
- Assignments of service requests are done at the task level

Project Management

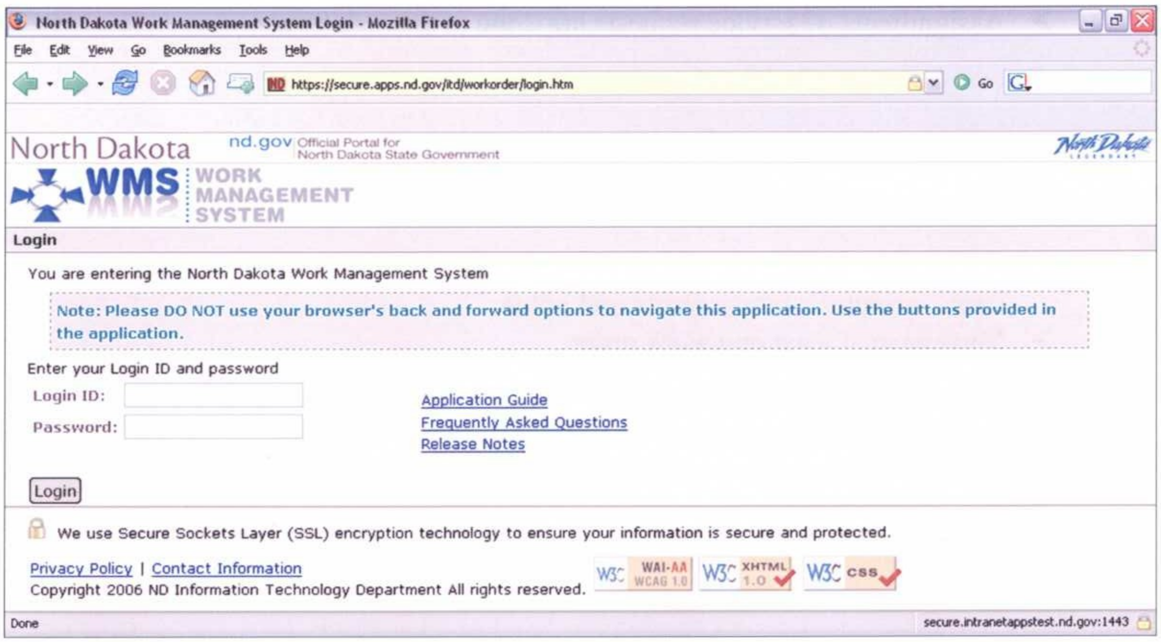
- Used to store various project documentation/activities, such as: issues, action items, minutes, status reports and notes
- Must have at least one work order
- Can have multiple work orders linked to a project
- Allows for a project team to be defined
- Allows for default assignments/notifications to be specified
- Allows for Email notifications
- Project Management assignments/notifications show in Work Queue

Time Reporting

- Entry of actual hours based on calendar option
- Displays open assignments, completed assignments, and other charge time in the past 30 days
- Time Entry will be posted to ITD's Time Card System
- Corrections must be done on WMS, entries are protected on the ITD's Time Card System

Login

- Open your Internet web browser – e.g., Microsoft Internet Explorer
- Go to www.nd.gov/itd
- Click on the 'WMS' Logo
- If you get a 'Security Alert' popup, select OK



- From the WMS Login page, login to WMS (use your active directory account)

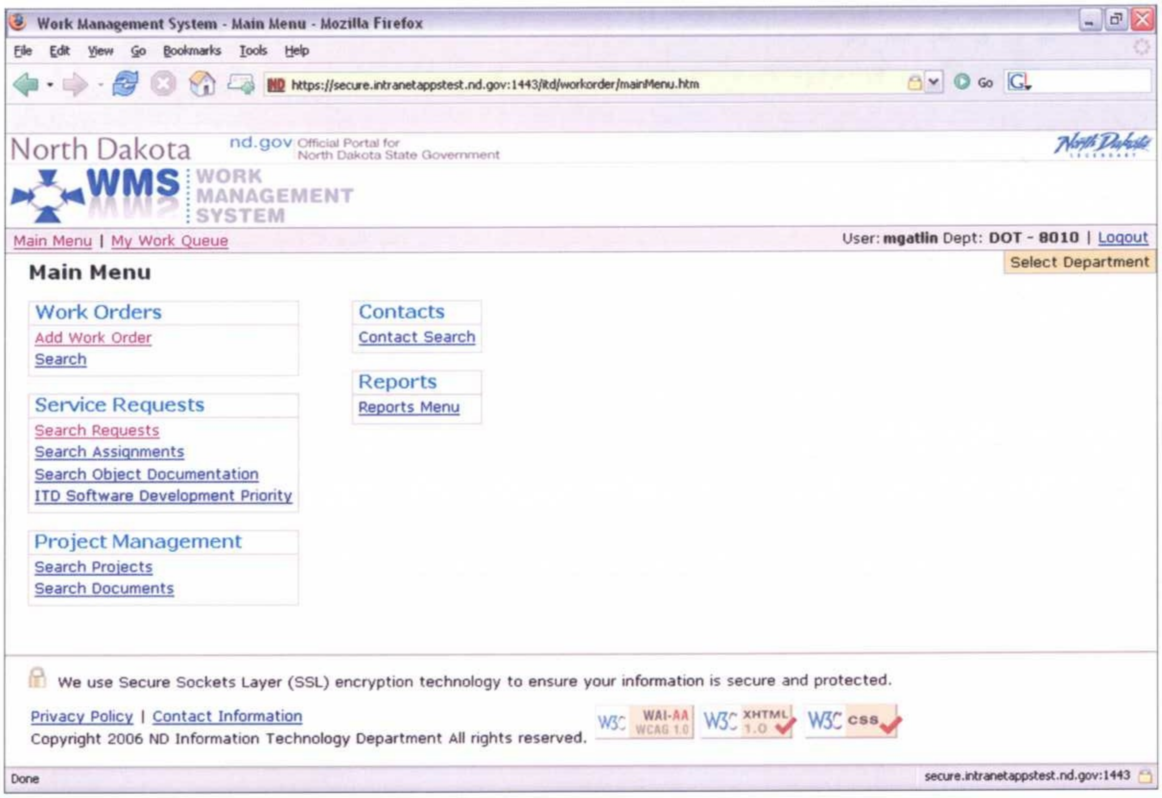
Select Department

➢ The Select Department page is optional and will only be displayed to users who are in agencies that have multiple departments.

➢ From Select Department page, select a department name link.

Switching Between Departments

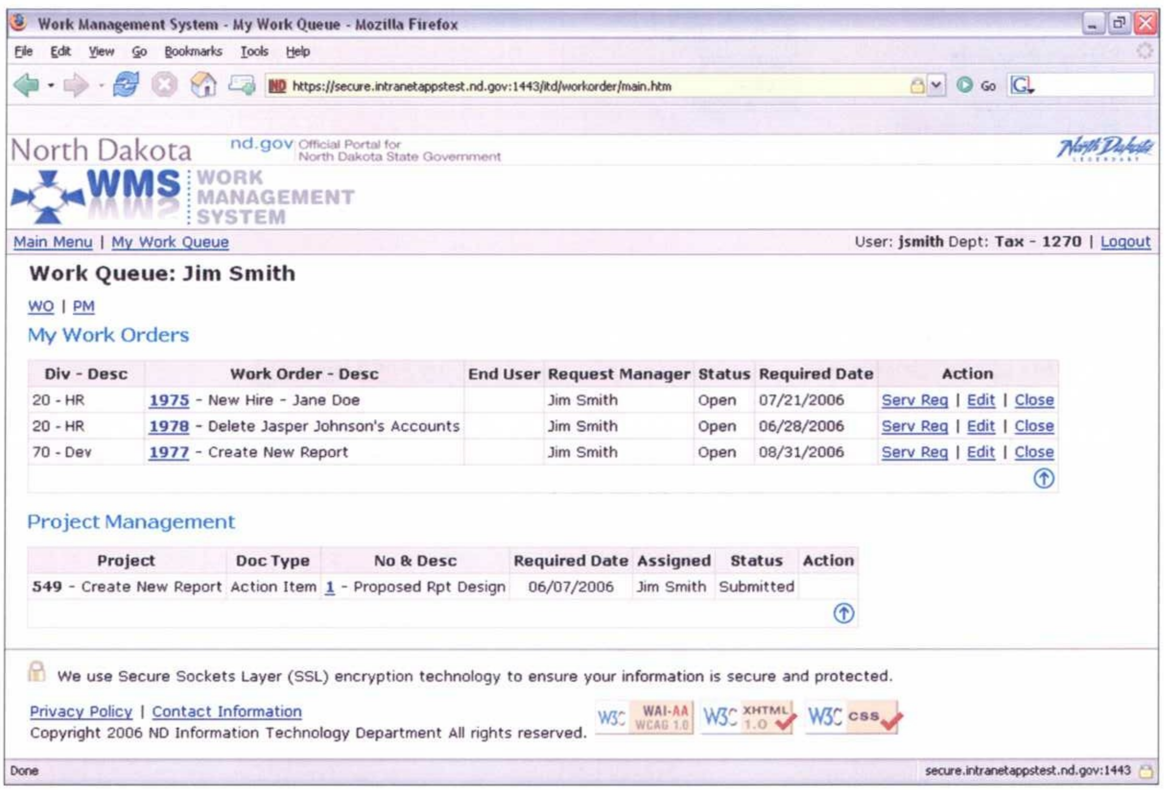
➢ To switch to another department, select either the "Main Menu" or "My Work Queue" links.



➢ Select the "Select Department" link in the upper right of the page (under the Logout link).

Work Queue

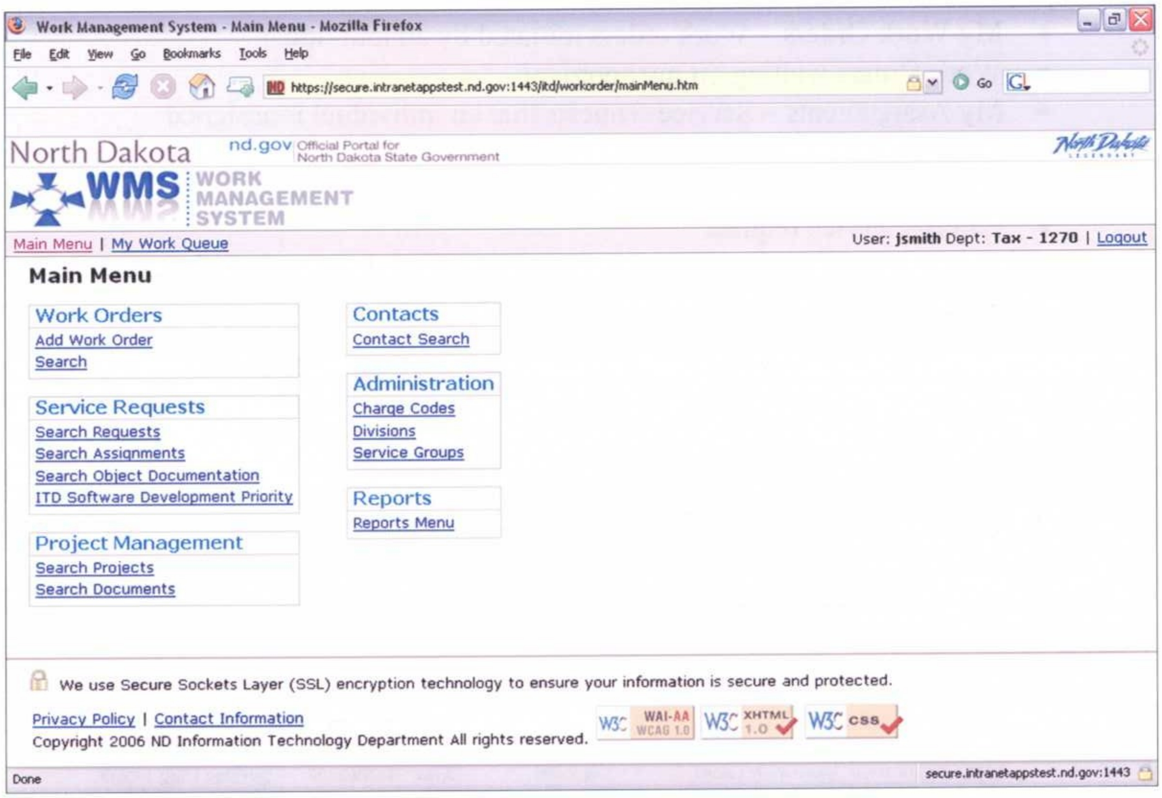
- A personalized view of an individual's work on WMS
- Displays:
  - My Work Orders – Work orders initiated by an individual
  - Work Orders waiting on my approval
  - My Assignments – Service requests that an individual is assigned
  - Project Management – action notifications for project management documents (ex. action item, issues, minutes)
  - Process service request
- The initiator of a work order must complete the work order upon notification of completed service request(s) associated with work order.



- From Work Queue page, select 'Main Menu' link.

Main Menu

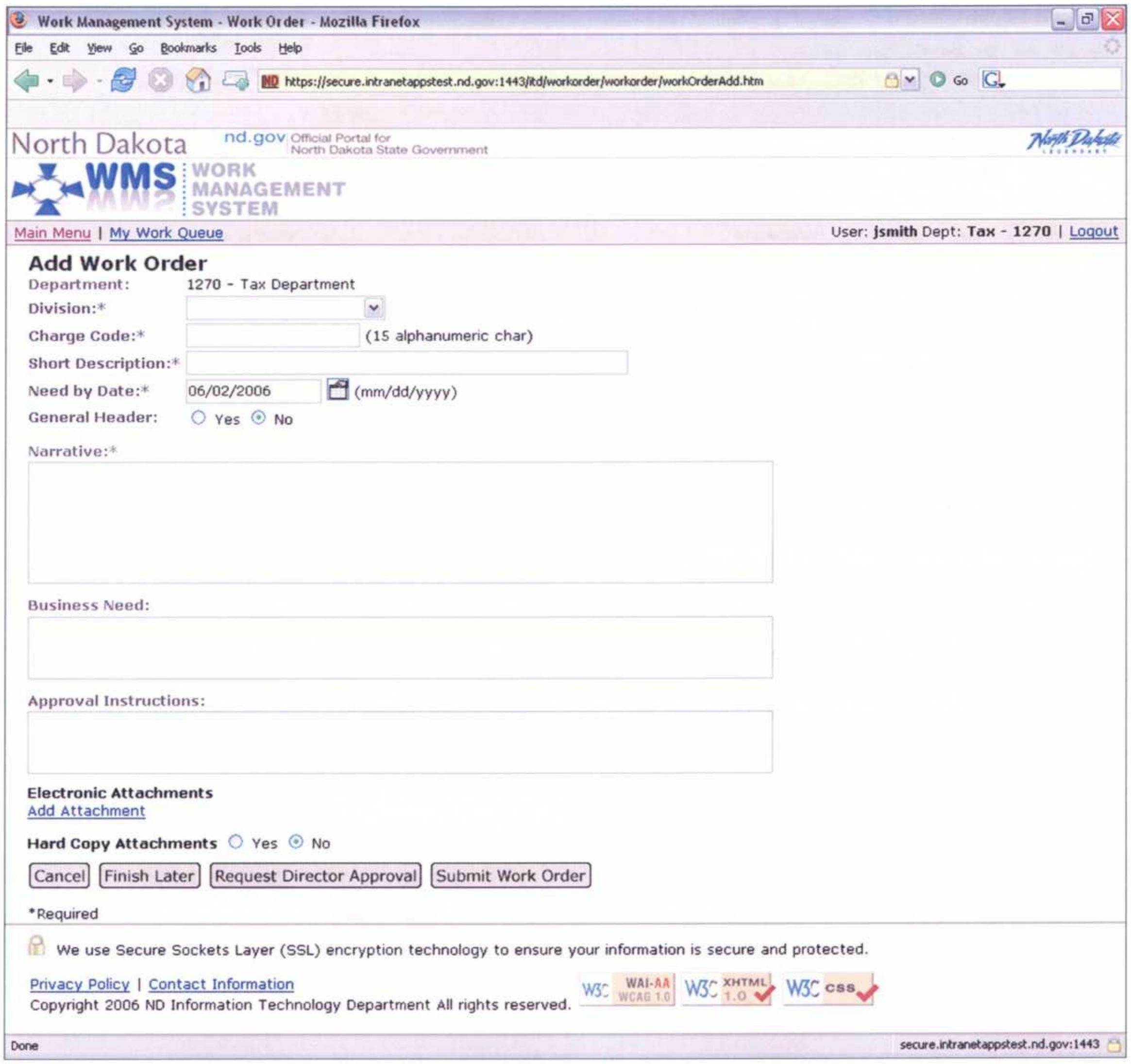
- Menu options vary per individual based upon administrative setup of system



- From Main Menu page, select 'Add Work Order' link.

Add Work Order

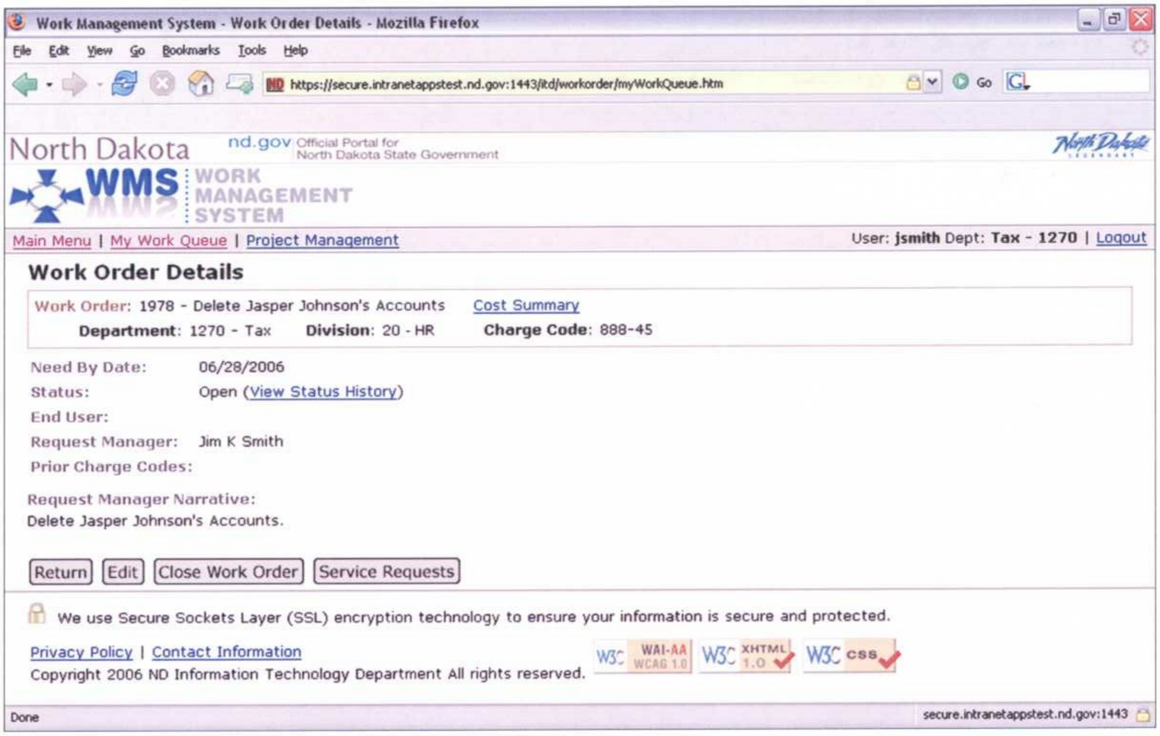
- Division option vary per individual based upon administrative setup of department and individual



- Fill in required fields (denoted by '*'), and select Submit Work Order.

Add Service Request

- A service request is the actual request for work to be performed by ITD or internally within department

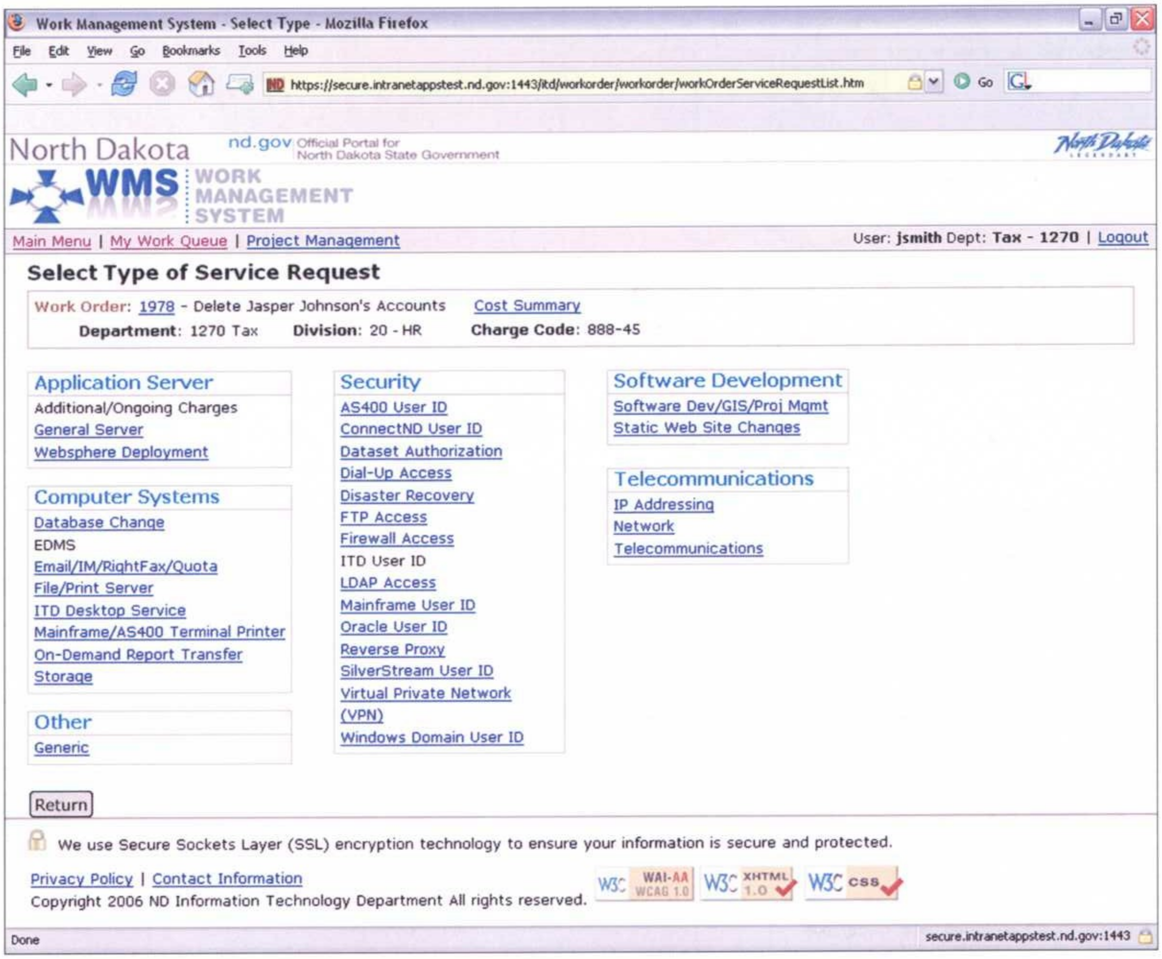


- From Work Order Details page, select [Service Requests].

- From Work Order Service Requests page, select [Add Service Request].

Select Type of Service Request

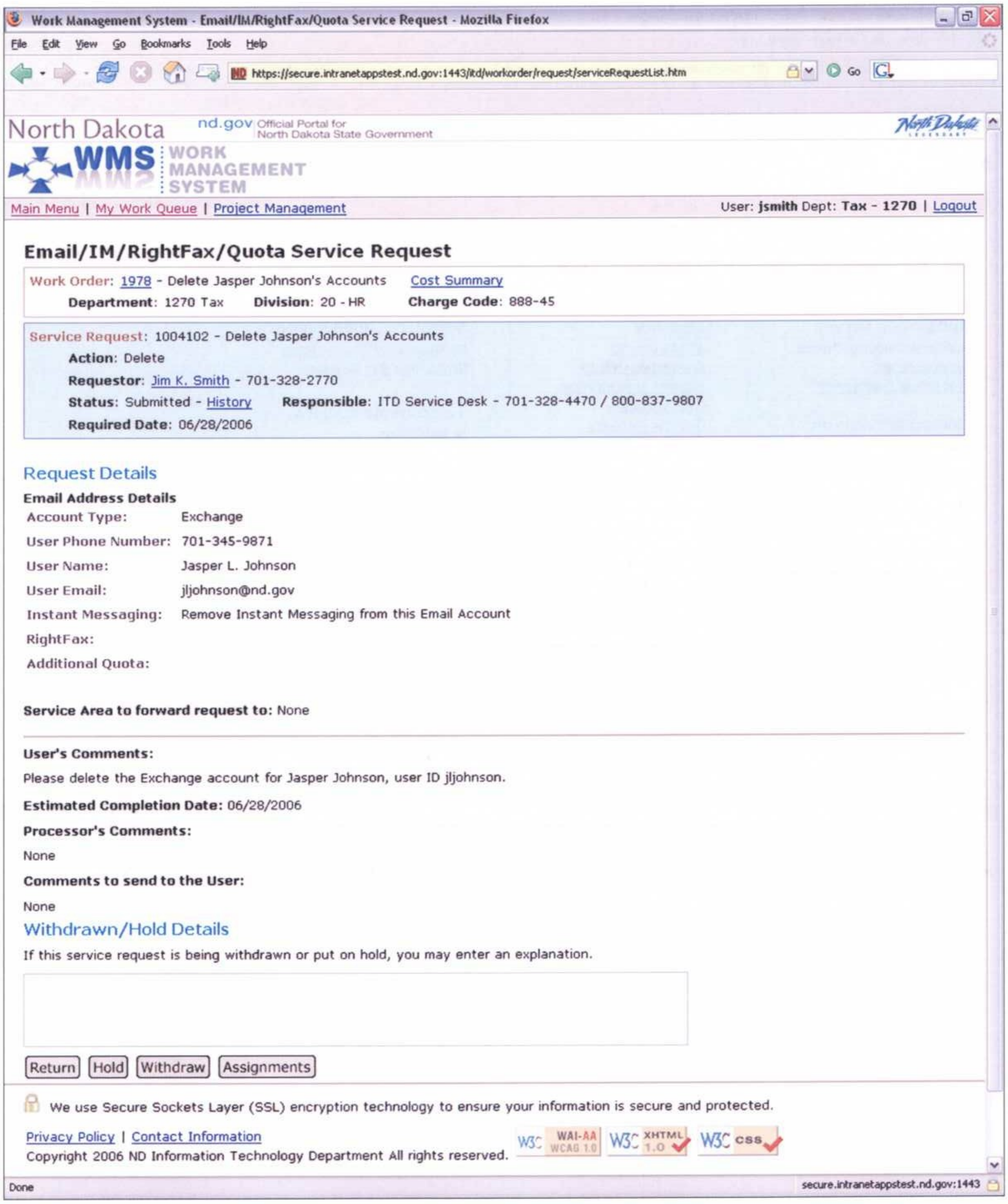
➢ Available selection of service requests is dependent on security access



➢ From Select Type of Service Request page, select specific service request link, fill in required fields, and select Submit.

Sample Submitted Service Request

- An example of an Email/IM/RightFax/Quota service request follows.



Work Management System - Email/IM/RightFax/Quota Service Request - Mozilla Firefox

File Edit View Go Bookmarks Tools Help

https://secure.intranetappstest.nd.gov:1443/itd/workorder/request/serviceRequestList.htm

North Dakota nd.gov Official Portal for North Dakota State Government

WMS WORK MANAGEMENT SYSTEM

Main Menu | My Work Queue | Project Management — User: jsmith Dept: Tax - 1270 | Logout

Email/IM/RightFax/Quota Service Request

Work Order: 1978 - Delete Jasper Johnson's Accounts — Cost Summary

Department: 1270 Tax **Division**: 20 - HR **Charge Code**: 888-45

Service Request: 1004102 - Delete Jasper Johnson's Accounts

Action: Delete

Requestor: Jim K. Smith - 701-328-2770

Status: Submitted - History **Responsible**: ITD Service Desk - 701-328-4470 / 800-837-9807

Required Date: 06/28/2006

Request Details

Email Address Details

Account Type:	Exchange
User Phone Number:	701-345-9871
User Name:	Jasper L. Johnson
User Email:	jljohnson@nd.gov
Instant Messaging:	Remove Instant Messaging from this Email Account
RightFax:	
Additional Quota:	

Service Area to forward request to: None

User's Comments:

Please delete the Exchange account for Jasper Johnson, user ID jljohnson.

Estimated Completion Date: 06/28/2006

Processor's Comments:

None

Comments to send to the User:

None

Withdrawn/Hold Details

If this service request is being withdrawn or put on hold, you may enter an explanation.

Return | Hold | Withdraw | Assignments

We use Secure Sockets Layer (SSL) encryption technology to ensure your information is secure and protected.

Privacy Policy | Contact Information

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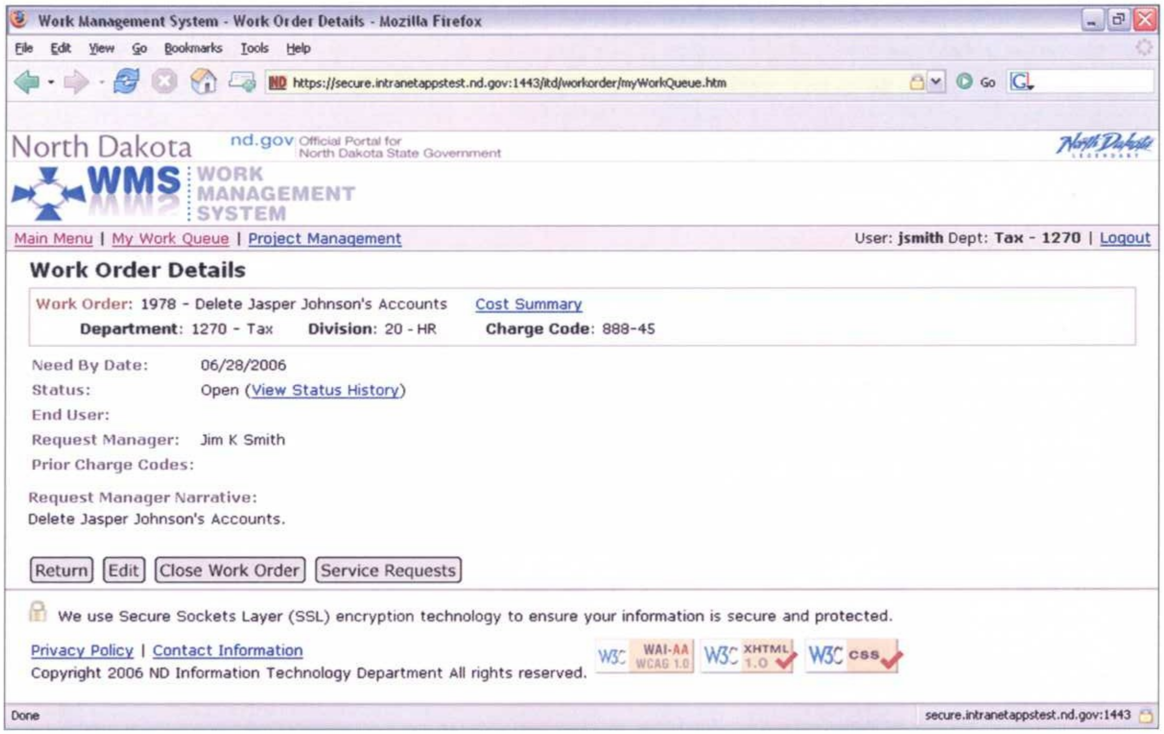
W3C WAI-AA WCAG 1.0 W3C XHTML 1.0 W3C CSS

Done — secure.intranetappstest.nd.gov:1443

Close Work Order

➢ Upon notification of service request completion, the work order should be closed.

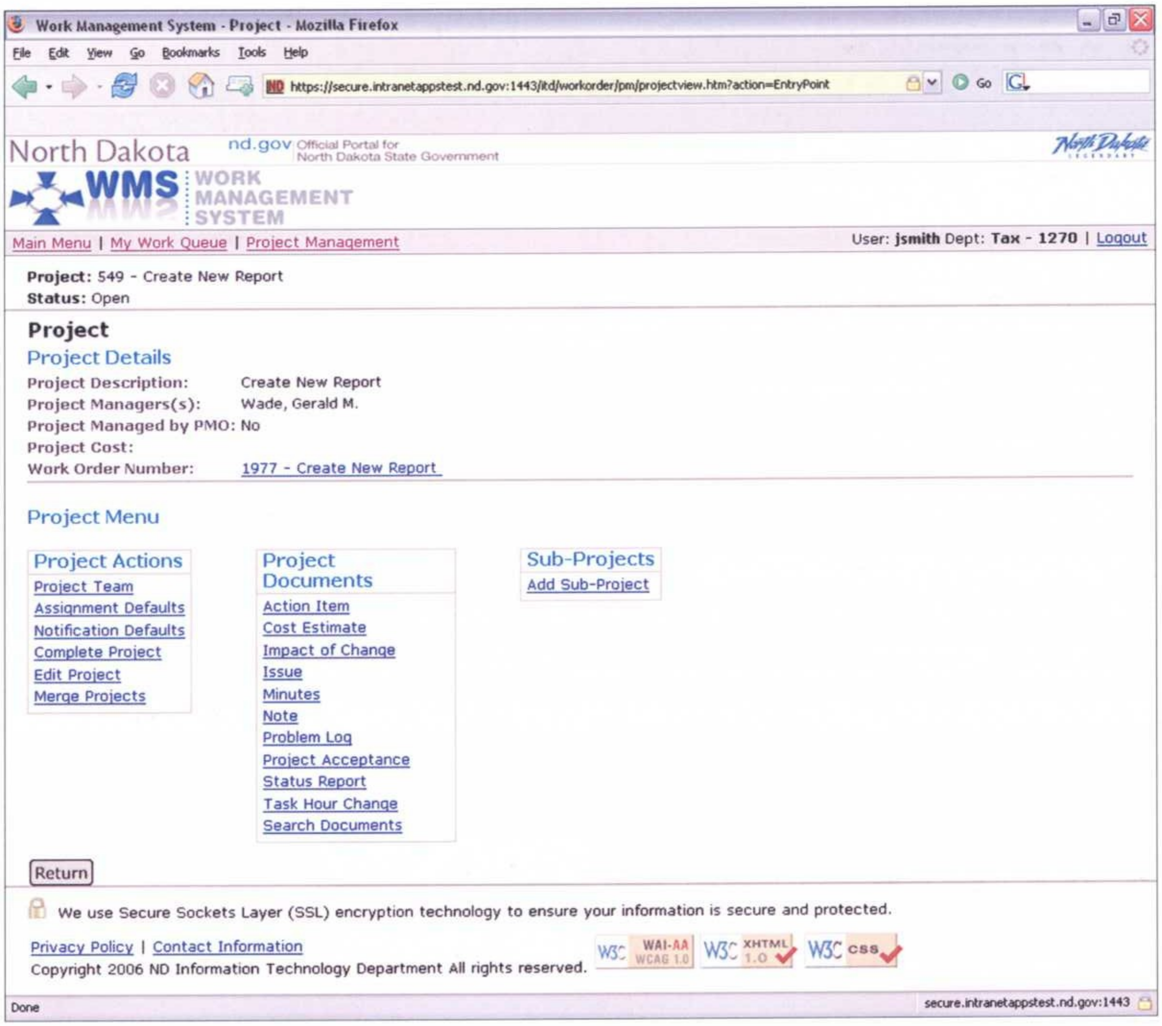


➢ From Work Order Details page, select Close Work Order.

➢ From Close Work Order page, select Close Work Order (a second time).

Project Management

From a Work Order or Service Request page, select 'Project Management' link.



Attachment A: Service Requests

Standard Request Information

* Information with an asterisk (*) is a required item:

Requestor Phone:*	List the 10 digit phone number of the Requestor.
Alternate Name :*	Full name of the individual chosen as an alternate contact.
Alternate Phone:*	Provide the phone number of your alternate contact.
Date Required:*	Date in which change should take effect.
Time Required:	Time frame that the Service Request needs to be performed.
Action:	Indicate the action to be taken for the service request: Add, Change, Delete.
Short Description:	Enter a description of work being requested.

AS400 User ID

This form is used to request access to the ITD AS/400 mainframe. User ID's are required to access anything on the AS/400. Typical resources needing access are Libraries, Files, Folders, and Printers.

User ID:*	ID is based upon standards used in Agency.
User Name:*	Full name of the user for which the work is being requested.
Initial Password:	Enter password of user initiating request. This is a one-time password and must be changed the next time it is used.
User ID to Copy From:	Specify an existing ID to be used as a model. All security for new ID will match the security for the model.
Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:	Enter comments or specific instructions here.

Add Another AS400 User ID Service Request:	Selecting "Yes" gives you the option to add another AS400 User ID Service Request.

Additional/Ongoing Charges

One-time Costs

Effective Date:*	Date when request goes into effect.
Credit Card Interface:*	Credit Card Interface is required and must be **numeric**.
LDAP:*	LDAP charge is required and must be **numeric**.
Load Testing:*	Load Testing charge is required and must be **numeric**.

Ongoing Costs

Division Number:	Division Number
User Project ID: (Charge Code)	
Start Date:	Date in which the change should take effect.
Application Name:	This is the applications name.
Monthly Application Server Usage:	
Change in current monthly charge:	
Replace Existing Application:	
Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:*	Enter comments or specific instructions here.
Add Another Additional/Ongoing Charges Service Request:	Selecting "Yes" gives you the option to add another Additional/Ongoing Charges Service Request.

ConnectND User ID

This form is used to request access to the ITD PeopleSoft applications. User ID's are required to access anything on the PeopleSoft servers. Typical resources needing access are the HR application and the Financials application.

Application(s) **Human Resource** **Financial** **Portal Server**	Select the appropriate Environment for the Application: **Dev** **Production** **QA** **Test** **OMB-Reporting**
User ID:*	ID is based upon standards used in Agency.
User Name:*	Full name of the user for which the work is being requested.
Empl ID No:*	Employee ID number of the user.
Email Address:*	Email address of the user for which the work is being requested.
User ID to Copy From:	Specify an existing ID to be used as a model. All security for new ID will match the security for the model.
Add User Details	Area to add further user details.
User ID's to Delete User ID*	Enter the User ID(s).
User ID's to Delete Action	Allows a User ID to be removed from the list of User IDs.
Add User ID	Area to add further User IDs.
Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:*	List any comments/special instructions here.
Add Another ConnectND User ID Service Request:	Selecting "Yes" gives you the option to add another ConnectND User ID Service Request.

Database Change

This work request is used to submit change(s) maintenance work request for Databases.

Environment:*	Select either Test or Production environment.
Database:*	Select one of the following Databases: **Adabas** **DB2/AS400** **DB2/zSeries** **Oracle** **SQL Server**
Schema/User ID/Library/ File:*	High level object qualifier for objects referenced in work request.
Additional Email Contact:	Email addresses of individuals, other than originator, that should be notified when request is complete.
Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:*	List any comments/special instructions here.
Add Another Database Change Service Request:	Selecting "Yes" gives you the option to add another Database Change Service Request.

Dataset Authorization

This form is used to request access to the ITD Z/OS mainframe data files. User ID's are required to access any mainframe data files. Typical data files needing access are OS datasets (tapes and disks), DB2 tables, and ADABAS tables via Entire Connect.

Authorized Department:*	Select the department from the drop down list.
Access Requirements Access Method:*	Select Access Methods from the options listed below: **Batch** **Natural** **Entire Network (JDBC)** **TSO** **NOTE:** User ID is required if Entire Network (JDBC) or TSO is selected.

Access Requirements Access Level:*	Select one Access Level from the options listed below: **Read Only** **Read/Update** **Create/Read/Update/Delete**
Authorized Datasets Dataset Name:*	Enter the Dataset Name(s). **NOTE:** Access Methods and Access Levels apply to all of the datasets entered.
Authorized Datasets Action:	Allows a dataset name to be removed from the list of dataset names.
Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:	List any comments/special instructions here.
Add Another Dataset Authorization Service Request:	Selecting "Yes" gives you the option to add another Dataset Authorization Service Request.

Dial-Up Access

This form is used to request access to the ITD Dial-up service. This service is offered to state agencies only.

Request Details First Name, M.I., Last Name, User ID:	Enter User Details – First Name, Middle Initial, Last Name, User ID.
Request Details Action:	Allows a user name to be removed from the list of user names.
Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:	List any comments/special instructions here
Add Another Dial-up Access Service Request:	Selecting "Yes" gives you the option to add another Dial-up Access Service Request.

Disaster Recovery

This form is used to request access to the ITD Strohl system. The Strohl system is used by agencies to enter disaster recovery plans.

Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:*	List any comments/special instructions here.
Add Another Disaster Recovery Service Request:	Selecting "Yes" gives you the option to add another Disaster Recovery Service Request.

EDMS

This work request is used to request services for Electronic Document Management Systems and the related technologies, which includes FileNet, LiquidOffice, Pinnacle, and TELEform.

User Name:*	Full name of the user for which the work is being requested.
Phone:*	Enter phone number of user, format is 7012223333
Email Address:*	User email address is required.
Division Name:*	Enter the Users Division Name for which the work is being requested.
Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:	Enter comments or specific instructions here.
Add Another EDMS Service Request:	Selecting "Yes" gives you the option to add another EDMS Service Request.

Email/IM/RightFax/Quota

This is the Work Request for email maintenance, as well as instant messaging, rightfax, and quota maintenance. Coordinators can request changes, additions, or deletions with this service request.

Account Type:*	Select from the following Account Types: **Exchange** **Lotus Notes** **Other Internet** **POP3**

User Phone Number:	Enter phone number of user (i.e. 7012223333)
User Division Name:	
User Name:*	Full name of the user for which the work is being requested.
Email User ID @Domain Name:	User ID @nd.gov
Email Group Membership:	
Instant Messaging:	**Add** Instant Messaging to this Email Account (monthly charge) **or Remove** Instant Messaging from this Email Account.
RightFax:	**Add** RightFax to this Email Account (monthly charge) **or Remove** RightFax from this Email Account.
Additional Quota:	**Add** an Additional Quota to this Email Account (monthly charge) **or Remove** the Additional Quota from this Email Account.
Charge Code: (Required if requesting to add Instant Messaging, RightFax, or Additional Quota)	
Lotus Notes License Type/ Home Server Name:	License Types: **Lotus Notes**, **Lotus Notes Desktop** Home server: **NoDak01**, **NoDak02**, **NoDak03**
Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:	Enter comments or specific instructions here.
Add Another Email/IM/ RightFax/Quota Service Request:	Selecting "Yes" gives you the option to add another Email/IM/RightFax/Quota Service Request.

FTP Access

This form is used to request access to the ITD ftp servers: ftp.state.nd.us, sftp.state.nd.us, and ftp.itd.nd.gov. User ID's are required to access files. There is no anonymous access to the ITD ftp server.

User ID:*	ID is based upon standards used in Agency
User Name:*	Full name of the user for which the work is being requested.
User ID to Copy From:	Specify an existing ID to be used as a model. All security for new ID will match the security for the model.
ITD FTP Server:*	Select either Internal or External.
Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:	List any comments/special instructions here.
Add Another FTP Access Service Request:	Selecting "Yes" gives you the option to add another FTP Access Service Request.

File/Print Server

Use this form when you're having problems with file or desktop printer problems or requests.

File/Print Details:	Request Type (s):* **Printers** **Security** **Share** Permissions **Other**
Server Name:*	Server on which changes will be made.
File Location:	Location of file or folders (i.e. Restore file test.txt in s:/test/data).
Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:*	List any comments/special instructions here.

Add Another File/Print Server Service Request:	Selecting "Yes" gives you the option to add another File/Print Server Service Request.

Firewall Access

This form is used to request access through the ITD firewalls. Hosts (servers/workstations) behind ITD's firewalls are by default not accessible from the Internet unless authorized. Typical hosts needing authorization are web servers, database servers, ftp servers.

DNS Host Name:*	DNS name of host being authorized in firewall.
Host TCP/IP Address:*	IP address of host being authorized in firewall.
Ports Allowed:*	List of IP ports to be allowed.
Outside Firewall Access:*	Enter the IP Addresses to limit access form; you may enter a single address or a range of addresses.
Allow all outside firewall access:	Check box if ports allowed is for any outside access, not IP number restriction. Limit access from: Specify list if IP numbers that should be allowed to specified host.
Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:	List any comments/special instructions here.
Add Another Firewall Access Service Request:	Selecting "Yes" gives you the option to add another Firewall Access Service Request.

General Server

Prod/Test:*	Select Test or Production.
Server/System:	Select either Internal or External.
Request Type:*	Select from the following: **New System/Application** **Removal** **System Configuration Change** **System Upgrade/Maint.**

Task to be Completed:	Enter description of task.
When to Deploy:	Enter date/time deployment is required.
Coordination Requirements:	Enter dependencies, requirements, etc. needed for deployment.
Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:	List any comments/special instructions here.
Add Another General Server Service Request:	Selecting "Yes" gives you the option to add another General Server Service Request.

Generic

Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:*	List any comments/special instructions here.

IP Addressing

This form is used to request the Addition, Deletion, or Change to an IP Address.

IP Address or Subnet Address (NOT Subnet Mask):*	If the Action is to Add an IP Address, enter the Subnet Address. If Action is for a Change or Delete, enter the IP Address you want to Change or Delete.
Name of Host:*	A unique identifying name by which the machine is known on the network.
Physical Location of Host:*	Provide the physical location of the device.
DHCP:*	Select one of the following: **Static DHCP** **Non DHCP**
End User:*	Person's name this device belongs to or Type of device, such as File Server or Print Server.

Hardware Type:*	Select one of the following types: **Other** **Printer** **Server** **Work Station**
MAC Address:*	Provide the MAC address of the device.
Operating System:*	Select one of the following: **As400** **Dos** **Linux** **NetWare3.x** **NetWare4.x** **NetWare5.x** **OS/2** **Other** **Unix**
Network Type:*	Select one of the following types: **Ethernet** **Token Ring**
Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:	List any comments/special instructions here.
Add Another IP Addressing Service Request:	Selecting "Yes" gives you the option to add another IP Addressing Service Request.

ITD Desktop Service

This form is used by ITD management, supervisors and support staff to submit online work requests to the ITD Distributed Systems Team, and should only be used for new work that is to be performed.

Request Type(s):*	Select the following that applies to the request: **Hardware** **Software**
User Name:*	Full name of the user for which the work is being requested.
Users Phone:	Enter phone number of user, format is 7012223333

Building Address:*	Enter the physical location of the equipment requiring service.
Floor:	Users Location (floor number).
Cube/Room:*	Cubicle number or room number where the user or PC/server is located.
Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:	Enter comments or specific instructions here.
Add Another ITD Desktop Service Request:	Selecting "Yes" gives you the option to add another ITD Desktop Service Request.

ITD User ID

This form is used to request any changes to ITD personnel. This form is used by ITD only. Typical use of this form is for personnel adds, deletions, and moves.

Name:*	Full name of the user for which the work is being requested.
Home Phone:	Users home phone number. Used for on-call purposes.
Cell Phone:	Users cell phone number.
Pager:	User's pager number.
Mainframe File Suffix:	User's mainframe file suffix (usually the person's initials).
Job Prefix:	User's new mainframe job submittal prefix (usually the person's initials).
Current Location:	
Location:	User's current physical location (J-Wing, Northbrook, NDAC, DCN).
Cube:	User's current cube number (if they have one).
Phone:	Enter phone number of user (i.e. 7012223333).
Phone Jack:	User's current work phone jack number

Data Jack:	User's current work data jack number (jack number pc is plugged into).
Team Name(s): Action	This gives you the option to add another team.
New Location:	
Location:	User's new physical location (J-Wing, Northbrook, NDACO, DCN)
Cube:	User's new cube number (if they have one)
Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:	Enter comments or specific instructions here.
Add Another ITD User ID Service Request:	Selecting "Yes" gives you the option to add another ITD User ID Service Request.

LDAP Access

This form is used to request access to the ITD applications authenticated by IBM SecureWay LDAP server. Currently two types of applications use LDAP user ID's for authentication: 1) ITD FTP servers, 2) (External) IBM Websphere web applications. IBM Websphere web applications are written by the ITD Programming Section.

User ID:*	ID is based upon standards used in Agency.
User Name:*	Full name of the user for which the work is being requested.
Initial Password:*	Initial password value. Applications may or may not require the password to be changed at next login.
User ID to Copy From:	Specify an existing ID to be used as a model. All security for new ID will match the security for the model.
Address:*	Enter User's address
City, State, Zip:*	Enter the User's following information: **City** **State (select from the drop down box)** **Zip Code**

Phone:*	Enter phone number of user, format is 7012223333
Email Address:	Enter users email address
LDAP Application Group Membership:	
Region:*	Specify if the request is for Test or Production
Department:*	Dept OU. This is usually a three-character prefix of the department.
Application:*	Application OU
Group:*	Group of application
Remove This Group:	This allows User to be removed from the Group Membership.
Add Group Membership:	Adds User into a Group Membership.
Information Technology Department (ITD) will use the security questions below to verify the User's identity when a User requests that his/her password be reset.	
Question One:	Password reset info, Description of Question One.
Answer One:	Password reset info, Answer to Question One.
Question Two:	Password reset info, Description of Question Two.
Answer Two:	Password reset info, Answer to Question Two.
Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:	List any comments/special instructions here.
Add Another LDAP Access Service Request:	Selecting "Yes" gives you the option to add another LDAP Access Service Request.

Mainframe User ID

This form is used to request access to the ITD Z/OS mainframe. User ID's are required to access anything on the mainframe. Typical resources needing access are CICS, Natural, DB2, and Supersession.

User ID:*	ID is based upon standards used in Agency
User Name:*	Full name of the user for which the work is being requested.
Initial Password:*	Initial password value. This is a one-time password and must be changed the next time it is used.
User ID to Copy From:	Specify an existing ID to be used as a model. All security for new ID will match the security for the model.
Audit Code:	This is an alphanumeric code to be used as the CICS OPERID. Current systems that use this code are ARIS, and Bank systems.
Dept Code:	Dept number for ID. Usually is the same as in the charge code.
Division Code:	Division number for ID. If coded, it usually the same as in the charge code.
Cost Center:	Cost center number. Currently only used by Department of Transportation.
Program Groups:	Names of groups of CICS programs (usually are individual programs).
PF Key Code:	This is a numeric field used by the ARIS system to specify a PF Key set.
Transaction Groups:	Names of groups of CICS transactions usually systems).
Supersession Applications:	Applications that should show up on ID's Supersession Menu.
Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:	List any comments/special instructions here.
Add Another Mainframe User ID Service Request:	Selecting “Yes” gives you the option to add another Mainframe User ID Service Request.

Mainframe/AS400 Terminal Printer

This form is used to request the Addition, Deletion or Change of a Mainframe or AS400 defined Printer or Workstation.

Request Type:*	Click the drop down arrow to select either **Mainframe** or **AS400** request type.
PU Physical Unit:	(not available when Requesting AS400 devices) This field is filled in for some Mainframe devices configured on a 3270 controller.
LU Logical Unit:	(not available when Requesting AS400 devices) This field is filled in for some Mainframe devices configured on a 3270 controller.
Printer Session:	Check this box if your request concerns a Printer Device.
Printer Make:	Provide the make of Printer.
Printer Model:	Provide the model of the Printer.
Printer Control Language:*	Click the drop down arrow to select the appropriate Control Language for this Printer device.
IP Address:	Provide the IP Address if applicable of the Workstation or Printer.
IP Printer Queue Name:	Provide the Queue name of the Printer.
Type of PC Emulation Software:	Provide the name of the Emulation software for PC devices defined for the Mainframe.
Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:	List any comments/special instructions here.
Add Another Mainframe/AS400 Terminal Printer Service Request:	Selecting "Yes" gives you the option to add another Mainframe/AS400 Terminal Printer Service Request.

Network

This form is used to request additions, deletions, or moves of local area network devices. Can also be used to request route changes on the wide area network.

Building Address:*	Address where request is to be performed.

City:*	City where request is to be performed.
Floor:*	Location (floor number) where request needs to be performed.
Room:*	Room where request needs to be performed.
Jack(s):	List jack(s) involved in work.
User Name:*	Full name of the user for which the work is being requested.
Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:	Enter comments or specific instructions here.
Add Another Network Service Request:	Selecting "Yes" gives you the option to add another Network Service Request.

On-Demand Report Transfer

This form is used to request ITD to transfer an On-Demand report to an OS dataset or it can be used to delete a report.

Report ID:*	Report ID is required.
Report Date:*	Date when request needs to be completed.
Output Dataset Name:*	Name of mainframe dataset the report is to be stored in.
Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:	List any comments/special instructions here.
Add Another On-Demand Report Transfer Service Request:	Selecting "Yes" gives you the option to add another On-Demand Report Transfer Service Request.

Oracle User ID

This form is used to request access to the ITD Oracle instances. User ID's are required to access anything on Oracle. Typical resources needing access are Tables, Roles, and Stored Procedures.

Region:*	Specify if request is for Test or Production Oracle
Database/Instance:*	Name of Oracle Instance controlling this request
Add User ID:	Allows Requestor to specify user id information to add/delete.
Add User Role:	Allows Requestor to specify roles to grant/revoke to/from user id.
Add Grant Details:	Allows Requestor to specify tables to grant/revoke to/from roles.
Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:	List any comments/special instructions here.
Add Another Oracle User ID Service Request:	Selecting "Yes" gives you the option to add another Oracle User ID Service Request.

Reverse Proxy

This form is mainly used internally by ITD Tech Support personnel. It is used to request web servers to be configured in the ITD Reverse Proxy servers. Reverse Proxy servers replace the requirement of having web servers defined in the PIX firewall. Only the Reverse Proxy needs to be defined in the PIX. It redirects traffic from the internet to the web servers.

NOTE: This request is for HTTP services only. If your server offers other services, i.e. FTP, do NOT use this form because any additional services that you offer on the server will not work.

External DNS Name:*	External DNS name wanted for this host.
List all aliases for this server:*	List any additional aliases wanted for this host.
Internal DNS Name:*	Internal DNS name wanted for this host.
List all aliases for this server:*	List any additional aliases wanted for this host.

Internal IP Address:*	IP address of host being defined.
SSL Information:	
SSL Required:	If "Yes" is selected, provide the following information: **Operating System on the server.** **Type of web server and version number.**
Operating System on the Server:	Specify operating system type on the server.
Type of web server and version number:	Specify web server type and version number.
If a cert already exists, can it be converted? – (Apache ye, IIS5yes, IIS4 maybe) Please provide ITD with cert and key in conversion is feasible. If conversion cannot be done, speak with ITD Security to obtain a SSL Certificate. If there is a need for SSL to terminate anywhere other than at the Reverse Proxy server, please explain in the Comments/Special Instructions area.	
Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:	List any comments/special instructions here.
Add Another Reverse Proxy Service Request:	Selecting "Yes" gives you the option to add another Reverse Proxy Service Request.

Silverstream User ID

This form is used to request access to the ITD Silverstream applications (older web applications written using Silverstream). User ID's are required to access web applications. Typical applications needing access are ITD On-Line Service Request system, Central Services State Procurement system, Health Marriage Certificate system.

User ID:*	Name of Department the ID is for.
User Name:*	Name of the person to be using the ID.
Initial Password:	Initial password value. This is a one-time password and must be changed the next time it is used.
Remove:	Allows Requestor to remove request detail entries.

Add User Details:	Allows Requestor to add additional request detail entries.
Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/SilverStream Groups/Special Instructions:	List any comments/special instructions here.
Add Another SilverStream User ID Service Request:	Selecting "Yes" gives you the option to add another SilverStream User ID Service Request.

Software Dev/GIS/Proj Mgmt

This form is used to request services from ITD Software Development, including software development, GIS, and project management services.

Priority:*	Select one of the following priorities: **High** **Medium** **Low**
Cost Estimate	Select "Yes" if this is a Cost Estimate.
Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:*	Enter comments or specific instructions here.

Storage

Submit storage request(s) for Enterprise Server; iSeries/AS400 and distributed systems.

Request Type:*	Select one of the following request types: **Add Storage** **Archive/Recover** **Backup/Restore** **Change Storage** **Delete Storage** **Question**
System:*	Select one of the following systems: **Distributed Systems** **Enterprise Server** **iSeries/AS400**

Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:*	Enter comments or specific instructions here.
Add Another Storage Service Request:	Selecting "Yes" gives you the option to add another Storage Service Request.

Telecommunications

To request Moves, Additions, or Changes to existing Telephone services, or to request new Voice services/equipment.

User Name:*	Full name of the user for which the work is being requested.
Primary Directory Number:	Indicate what the number(s) is that the request is being submitted for. If it's a new number, indicate New.
Other Directory:	Indicate any other number(s) that are involved with this request.
Type of Set:*	Select one of the following type sets: **M3902 Basic/Single line** **M3903 Enhanced/Speakerphone** **M3904 Pro./Secretarial/ACD** **Other** – Please Specify
Building Address:*	Address where request is to be performed.
City:*	City where request is to be performed.
Floor:*	Location (floor number) where request needs to be performed.
Room:*	Room where request needs to be performed.
Jack(s):	List jack(s) involved in work.
Groups are allowed to use the call pickup key to pickup other ringing phone. This user should be in the same pickup group as phone number: Enter Phone Number i.e. (2223334444)	

Class of Service	Select one of the following class of service: **Service 1** - (Interstation, local, in-state, interstate, international). **Service 13 -** (interstation) **Service 16 -** (interstation,local, in-state) **Service 3** – (interstation, local, in-state, interstate) **Service 5** (interstation, local, in-state)
Internal Calls:	List the number, the call should be re-directed to if the station is busy (2223334444). List the number, the call should be re-directed to if the person does not answer (2223334444).
External Calls:	List the number, the call should be re-directed to if the station is busy (2223334444). List the number, the call should be re-directed to if the person does not answer (2223334444).
Speed Calling:	Selecting "Yes" gives you the option to personalize speed call group. Please specify the required size (increments of 10).
Department Speed Call Group:	Selecting "Yes" allows for a department speed call group.
Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:	Enter comments or specific instructions here.
Add Another Telecommunications Service Request:	Selecting "Yes" gives you the option to add another Telecommunications Service Request.

Virtual Private Network (VPN)

This form is used to request VPN service. User ID's are required to access the VPN service. VPN is required to access the state network when the Internet Service Provider is someone other than ITD.

User Name:*	Full name of the person to be using the VPN
If User has a NDGOV account specify Used ID:	Enter User ID if user already has a NDGOV account.

Type of Connection:*	Select one the following connections types: **Primary** – VPN is the primary connection to the state network. **Secondary** – Individual already has a primary device connection to state network. **Non-Billable** – ITD provided DSL or cable modem connection.
Authentication Method:*	Select one of the authentication methods: **Local on the VPN Gateway** **NT/Windows 2000 Domain**
Group Information:*	Specify group name. If agency already has at least one VPN client then at least one group name has been created for them. Access requirement is defined by groups. If no group info, new group name will be created.
Host Access Required by End User:* (Provide IP Address or range):	Specify a list of host(s) the VPN client will need to access. Please specify the host IP number(s).
Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:	Enter comments or specific instructions here.
Add Another Virtual Private Network (VPN) Service Request:	Selecting "Yes" gives you the option to add another Virtual Private Network (VPN) Service Request.

Web Changes (Static Web Site Changes)

Submit web changes for static web sites.

Request Details **Action:***	Select one of the following actions: **New** **Change** **Problem** **Question/Help** Enter **URL:**
Electronic Attachments:	Allows Requestor to attach documents electronically.

Comments/Special Instructions:*	Enter comments or specific instructions here.
Add Another Web Changes Service Request:	Selecting "Yes" gives you the option to add another Web Changes Service Request.

Websphere Deployment

Submit request for application servers.

Ear File Location:*	Location where ear file to be deployed is located on the network.
Deploy EAR file to:*	Select one of the following environments where ear should be deployed: **Enigma** **Test Cluster** **Internal Prod**
2nd Ear File Location:	Location where the 2nd ear should be deployed.
2nd Deploy EAR file to:	Select one of the following environments where 2nd ear should be deployed: **Enigma** **Test Cluster** **Internal Prod**
Images/Includes Zip file Location:	The location on the network where the zip file containing the static web content is located.
Initial Deployment:*	Selecting "Yes" indicates if this application is being deployed for the first time.
Other Events to Coordinate Deployment with:	
Data Source Information	
Database Driver:	Select one of the following Database Drivers: **Adabas** **DB2** **Oracle** **SQL Server**

Name:	
JNDI Name:	The JNDI name for the resource.
Database Name:	The Oracle or DB2 database instance.
Default User ID:	The user ID the application uses to connect to the database.
URL Prefix:	The URL indicating the database from which the Data Source will obtain connections. Example: jdbc:oracle:oci8:@dbname.
Database Connections need to be Flushed:	Select "Yes" or "No".
Rebind/Restart the Server:	Select "Yes" or "No".
Secured Application:	Select one of the following: **Yes… Force Secure Connection (HTTPS)** **No… Force Normal Connection (HTTP)**
Context Root:	The default context used to identify the application Example: http://hostname/**webapp** /webapp is the context root.
Security Mappings:	
Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:	Enter comments or specific instructions here.
Add Another Websphere Deployment Service Request:	Selecting "Yes" gives you the option to add another Websphere Deployment Service Request.

Windows Domain User ID

This form is used to request access to the ITD Windows NT 4.0 and Windows 2000 domains. Typical resources needing access are Windows resource servers (normally agency servers). Windows 2000 NDGOV domain is also used to authenticate access to ITD's Exchange server (email) and some new web apps. NDGOV domain user ID's can also be used to authenticate access to the ITD Dialup service and the ITD VPN service.

User ID:*	ID is based upon standards used in Agency.
User Name:*	Full name of the user for which the work is being requested.
Initial Password:	Initial password value. This is a one-time password and must be changed the next time it is used.
Domain:*	Select one of the following Domains: **NDGOV** **Test NDGOV**
User ID to Copy From:	Specify an existing ID to be used as a model. All security for new ID will match the security for the model.
Electronic Attachments:	Allows Requestor to attach documents electronically.
Comments/Special Instructions:	Enter comments or specific instructions here.
Add Another Windows Domain User ID Service Request:	Selecting "Yes" gives you the option to add another Windows Domain User ID Service Request.

Attachment B: Project Management

Add Project

- Used to initially setup a project
- Accessed when no project exists and you click on Project Management.

Project Name:*	Full name of the project.
Project Short Name :*	Short name of the project. Used to display in search lists.
Project Description:*	Description of the project.
Project Managed By PMO:*	Used to indicate the project is being monitored by ITD's Software Development PMO.
Include in Department Reporting:*	Used to indicate if the project is being monitored as a project by the requesting agency.
Work Order Number:	Select the work orders to be included in this project. Can select multiple work orders for a project.
Action:	Allows a work order to be removed from the select list of work orders.
Add Work Order Number	Used to select additional work orders to be included in the project.

Project Team

- Used to identify the individuals who are involved in a project
- Shows the individuals already identified to the project
- Allows the current individuals to be removed from the project
- Allows for the project manager(s) to be identified
- Allows individuals to be added to the project
- When adding new individuals to a project, search and select the individuals to be added. Individuals must be setup as a contact in WMS to be added to a project team.

Assignment Default

- Used to indicate who is the default assignee for each project management form.

- Individuals must be defined to the project team to be an assignee
- Only one person can be selected as the assignee per form

Name:	Shows the names of the people identified as the project team.
Cost Estimate	Select the person to be identified as the default assignee. Select only one.
Impact of Project Change	Select the person to be identified as the default assignee. Select only one.
Issue	Select the person to be identified as the default assignee. Select only one.
Minutes	Select the person to be identified as the default assignee. Select only one.
Problem Log	Select the person to be identified as the default assignee. Select only one.
Project Acceptance	Select the person to be identified as the default assignee. Select only one.
Task Hour Change	Select the person to be identified as the default assignee. Select only one.

Notification Defaults

- Used to indicate who is to be notified when the different project management forms are submitted, such as issues and impacts.
- Individuals must be defined to the project
- Can select multiple individuals per form.

Name:	Shows the names of the people identified as the project team.
Cost Estimate	Select the person(s) to be notified when a cost estimate is submitted. Can select multiples.
Impact of Project Change	Select the person(s) to be notified when an impact of project change is submitted. Can select multiples.

Issue	Select the person(s) to be notified when an issue is submitted. Can select multiples.
Minutes	Select the person(s) to be notified when a minutes is submitted. Can select multiples.
Problem Log	Select the person(s) to be notified when a problem log is submitted. Can select multiples.
Project Acceptance	Select the person(s) to be notified when a project acceptance is submitted. Can select multiples.
Status Report	Select the person(s) to be notified when a status report is submitted. Can select multiples.
Task Hour Change	Select the person(s) to be notified when a task hour change is submitted. Can select multiples.

Edit Project

- Used to edit project information such as name and description.

Project Name:*	Full name of the project.
Project Short Name :*	Short name of the project. Used to display in search lists.
Project Description:*	Description of the project.
Project Managed By PMO:*	Used to indicate the project is being monitored by ITD's Software Development PMO.
Include in Department Reporting:*	Used to indicate if the project is being monitored as a project by the requesting agency.
Work Order Number:	Select the work orders to be included in this project. Can select multiple work orders for a project.
Action:	Allows a work order to be removed from the select list of work orders.
Add Work Order Number	Used to select additional work orders to be included in the project.

Merge Projects

- Used to merge multiple projects into 1 project.

- Must be under the project that you want other projects merged into
- Search and select the projects you want to merge.
- Project teams will be merged. Information on main project will take priority.
- Assignment and Notification defaults on main project will not be changed
- Forms under merged projects will be moved under the main project.

Action Item

This form is used to record an action item. An action item is an assignment to an individual for requesting information or an action. These assignments need to be completed in order for progress to continue or to complete a project plan task. An action item can come up during a project team meeting or due to a situation during the Project. An action item can be created as a stand alone or linked to minutes.

It is the responsibility of the person who created the action item to see it through to completion. The person who is assigned to an Action items is responsible for responding to the action item. Once the response is completed, it is the responsibility of the worker who created it to review the response and complete the action item. When assigning an action item it is important to record the Date Required. This is the date by which the action item needs to be responded to without affecting the schedule/cost of the project/phase.

If the person assigned to the action item is not able to finish the action item assignment by the Complete By Date, one of the following steps can be taken with the action item:

➢ An agreement is made between the ITD Project Manager and Department Project manager to extend the complete by date and possibly add or replace the person assigned to the action item.

➢ Escalate the action item to an Issue.

Only the Project Managers or Project Leads should move an action item to an Issue.

Short Description:*	Short description for the action items.
Sub-Projects:	If you have sub-projects defined for your project, you can select the sub-project(s) to which the action item relates.
Associated Minutes:	If the action items is to be linked to a specific set of minutes, select the minutes document from the drop down list.
Date Required:*	Date the item needs to be completed by, a deadline. Can type it in or select from the calendar.

Description:*	The description should explain what action is being requested from the assignee. Be as detail as necessary to ensure the assignee is sure of what's expected.
Initiator:*	Indicates who initiated the action item. Can only select one person.
Assignee:*	Select the individual who is assigned to the action item. Can only select one person.
Attachments:	This area is used for storing the documents relating to the action item.
Response:*	Document the results of the action taken.

Cost Estimate

This form is used to record a Cost estimate. The purpose of a Cost Estimate is to identify the development effort for a project.

Estimate Type:*	Used to categorize cost estimates. Select the estimate type from the drop down list.
Short Description:*	Short description for the cost estimate.
Sub-Projects:	If you have sub-projects defined for your project, you can select the sub-project(s) to which the cost estimate relates.
Manager:*	Select the ITD manager who is assigned to the cost estimate. Can only select one person.
Assignee:*	Select the individual who is assigned to the cost estimate. Can only select one person.
Attachments:*	Area for storing the cost estimate attachment for the assignee.
Internal Notes:	Area for the department that created the cost estimate to record any type of notes.
Internal Attachments:*	Area for the department that created the cost estimate for storing any cost estimate attachments.

Impact of Change

This form is used to record an Impact of Change. The purpose of an Impact of Change is to identify changes in cost and/or time relating to a project. The Impact must specify whether the change is an increase or decrease, what the change is to the cost and what the change is to the time (schedule). There are times when an Impact may affect one without the other. All Impacts must be approved or rejected.

Short Description:*	Short description for the issue.
Sub-Projects:	If you have sub-projects defined for your project, you can select the sub-project(s) that the impact relates to.
Associated Issue:	If the impact relates to an issue, select the issue from the drop down list.
Impact Reason:*	Used to categorize impacts. Select the reason from the drop down list.
Description of Change:*	Describe the impact.
Current Estimate Cost:*	Record what the current estimated cost of the project.
Current Estimate - Completion Date	Record what the current estimated completion date of the project.
Estimated Impact- Increase/Decrease:*	Indicate whether the overall impact is an increase or decrease to the cost or timeframe.
Estimated Impact - Impact Cost:	Indicate whether the change in cost is an increase or decrease and enter the cost of the change.
Estimated Impact- Ongoing Cost:	Indicate whether the change to the ongoing cost is an increase or decrease and enter the cost of the change.
Estimated Impact- Timeframe:	Indicate whether the change in the timeframe.
New Estimate- Cost:*	Will indicate the new estimated cost of the project. Click on 'Calculate New Estimate Cost' to calculate the new estimated cost.
New Estimate _ Completion Date:*	Record what the new estimated completion date of the project.
Initiator:*	Indicates who initiated the impact. Can only select 1 person.

Assignee:*	Select the individual who is assigned to the impact. Can only select one person.
Notifications:*	Select the individuals who are to be notified when the impact is submitted for review. Can select multiple individuals.
Attachments:	This area is used for storing documents relating to the issue.
Department Notes:	Area for Department that created the impact to record any type of notes.
Department Attachments:	This area is used by the Department that created the impact for storing the documents relating to the issue.
Comments:	This area can be used to record any information relating to this impact. This is required when denying or returning an impact.
Deny/Return/Approve	Used to indicate whether the impact is denied or approved or needs to be returned for correction. Only select one.

Issue

This form is used to record an issue. An Issue is defined as any point at which an unsettled matter is ready for decision. It is necessary to identify the specific impact and/or alternative(s) of an Issue. Alternatives replace the current item or plan. The impact could be to an application system, a workflow, a procedure, or equipment.

An Issue can be created due to the following:

- Functionality that is outside the Scope of the Project that is being requested
- An escalation of an action item.
- The Technical Project Lead and/or the Business Project Lead determine that an action item or problem could affect the time and/or cost of the Project.
- If a situation warrants it, an Issue can be created independently of an action item

Each Issue must describe the problem or scope change and any alternatives and/or impacts on the project. When approving an Issue the Department must enter a resolution. The resolution of the Issue needs to be documented in the RESOLUTION section of the Issue. The resolution should be entered by the person to whom the Issue was assigned and should indicate whether the recommendation was approved or whether some other alternative is desired. After the Issue is approved, the resolution should be reviewed by the person who initiated the Issue and the Issue is closed.

When an Issue affects a change in time or cost, an Impact of project change must be created. The Impact may need to be issued to help decide the recommended action for resolving the Issue.

Short Description:*	Short description for the issue.
Sub-Projects:	If you have sub-projects defined for your project, you can select the sub-project(s) that the issue relates to.
Date Required:*	Indicates the date by which the issue needs to be resolved. Enter the date or select from the calendar.
Description:*	Describes the issue.
Alternatives and Impacts:*	Describes all alternatives that could be considered and the impact of selecting the alternative. The alternatives/impacts could be modifications to a system, procedural change, customer impact, or financial ramifications. If there is an impact to the cost or schedule, an impact of project change must also be created.
Recommendation:*	Describes which alternative is recommended.
Department Notes:	Area for recording any type of notes.
Initiator:*	Indicates who initiated the action item. Can only select 1 person.
Assignee:*	Select the individual who is assigned to the action item. Can only select one person.
Notifications:*	Select the individuals who are to be notified when the issue is submitted for review. Can select multiple individuals.
Attachments:	This area is used for storing the documents relating to the action item.
Resolution:*	Description explaining what the assignee's resolution is to the issue. The resolution maybe an agreement with the recommendation or a completely different resolution. If the resolution is different from the recommendation, make sure to clearly explain the new resolution.
Comments:	This area can be used to record any information relating to this issue.

Deny/Return/Approve	Used to indicate whether the impact is denied or approved or needs to be returned for correction. Only select one.

Minutes

This form is used to record the minutes from various project related meetings. The purpose for project minutes is for project team members to read and understand the outcome of the project meetings.

Meetings are one of the major communication tools throughout a project. All meetings should be documented in to format of minutes There are various types meetings which can occur throughout a project. Some of the different types of meeting are:

- Project Team Meetings – This meeting can be for the personnel working on a project to discuss progress, issues or concerns.
- Analysis Meetings – These meetings are used for gathering the requirements for the project. These meetings are attended by ITD and the Department.
- Design Meetings – These meetings are used discuss how the system will work. These meetings are attended by ITD and the Department.
- Executive Committee Meetings – These meetings are for the Department's Project Manager to convey project information to the Executive Committee for the project. The information could be such things as the status of the project, outstanding issues, and budget information. These meetings should be held at least quarterly, but can be requested at any time by the Department's Project Manager or any member of the Executive committee. These meetings are generally for large projects.
- Status Meetings – These are periodic meetings between the ITD Project Manager, Department's Project Manager, ITD's Software Development Project Management Officer, and ITD's Software Development Manager. These meetings are generally for large projects.
- Project Closure Meeting – This meeting is held at the end of a project to discuss what "worked" and "didn't work" on the project. This meeting should be attended by all the people involved in the project.
- Phone Calls – Even though a phone conversation is not a face-to-face meeting, it should be treated as one. Phone calls should be documented like all other meetings.

All minutes documented need to be approved. The approval process ensures that the parties involved in the meeting agreed with what was documented.

Short Description:*	Short description for the set of minutes.
Sub-Projects:	If you have sub-projects defined for your project, you can select the sub-project(s) that the minutes relate to.

Meeting Type:*	Indicates the phase that the meeting is relating to. Select the type from the drop-down list.
Meeting Date:*	Date the meeting was held. Type the date or select from the calendar.
Meeting Time:*	Time of day the meeting was held.
Initiator:*	Indicates who initiated the minutes. Can only select 1 person.
Assignee:*	Select the individual who is responsibility for seeing that the minutes are reviewed and approved. Can only select one person.
Notifications:*	Select the individuals who are to be notified when the minutes are submitted for review. Can select multiple individuals.
Attachments:	This area is used for storing the actual minutes documents or any other document relating to the set of minutes. There is a minutes template available. There must be a minutes attachment.
Comments:	This area can be used to record any information relating to these minutes. This is required when returning minutes.
Return/Approve:	Used to indicate whether the minutes are approved or need to be returned for correction. Only select one.

Note

This form is used to record a Note. The purpose of a Note is to save and highlight questions, information or reminders. Notes can capture information relating to such things as training, testing, or enhancements. Notes can be used include any area that could be useful to the project. For example, it could be used for implementation notes, or analysis and design questions.

Short Description:*	Short description for the note.
Type of Note:*	Used to indicate what the note is relates to. Select the type from the drop down list or enter your own type.
Other Type:	If you can't find the type of note in the drop down list, enter an other type.
Description:*	Describe the note.

Attachments:	This area is used for storing the documents relating to the note.

Problem Log

This form is used to record a problem or future enhancement. The Problem Log is used to document a problem or a suggested enhancement discovered during the testing of a project. Problem Logs are used during system testing and acceptance testing. The Problem Log should describe the problem or enhancement with as much background detail as possible. Once a problem has been identified it will be assigned for someone to investigate. Once the source of the problem has been identified, the person assigned will take the necessary action and submit the problem for retest. When the tester has approved the retest of the problem, the log can be closed.

Short Description:*	Short description for the problem.
Sub-Projects:	If you have sub-projects defined for your project, you can select the sub-project(s) that the project acceptance relates to.
Test Phase:*	Indicates whether the problem or enhancement was identified during system or acceptance testing. Select only one.
Log Type:*	Indicate whether the document is a problem, enhancement, duplicate or no problem. Duplicate indicates that the same problem/enhancement has already been documented. No problems indicates that the problem is not a problem as a result of this project, could be an existing production problem.
Priority:*	Indicates the priority of the problem/enhancement. Select the priority from the drop down list.
Object Name:	If known, indicate the object name. This could be the screen/window name.
Test Scenario:	Describe the test scenario that was being tested. Include any identifying information that would help the person researching the problem.
Tester Sign-on:	Indicate the sign-on of the person who was doing the testing when the problem occurred.
Description:*	Describe the problem/enhancement.

Initiator:*	Indicates who initiated the project acceptance. Can only select 1 person.
Attachments:	This area is used for storing the documents relating to the problem log.
Assignee:*	Indicates who is assigned to the problem.
Resolution:*	When the problem has been fixed, describe what was fixed. This is required when submitting a problem log for retest.

Project Acceptance

This form is used to record a project acceptance. Project Acceptance forms are to be used as verification of the approval of key deliverables within the project. Project Acceptance forms should be done for such key deliverables as the Project Plan, the Statement of Work, the Analysis document, the Design Phase, and when the entire project is considered complete. The Project Acceptance form has a standard text that appears when the Type of Acceptance is selected. A standard text for all Types of Acceptance is always displayed in a non-modifiable section of the form asking for a signature to indicate approval. The Project Acceptance form must be approved.

Short Description:*	Short description for the project acceptance.
Sub-Projects:	If you have sub-projects defined for your project, you can select the sub-project(s) that the project acceptance relates to.
Acceptance Type:*	Indicates what the project acceptance is for. Select the type from the drop down list.
Other Description:	If you selected Other, you must enter an other description.
Comments:	Enter any comments that relate to this project acceptance.
Initiator:*	Indicates who initiated the project acceptance. Can only select 1 person.
Assignee:*	Select the individual who is assigned to the project acceptance. Can only select one person.
Notifications:*	Select the individuals who are to be notified when the project acceptance is submitted for review. Can select multiple individuals.

Attachments:	This area is used for storing the documents relating to the project acceptance. This area can be used to attached the deliverable.
Return/Approve Comments:	This area can be used to record any information relating to this project acceptance. This is required when returning a project acceptance.
Return/Approve:*	Used to indicate whether the project acceptance is approved or needs to be returned for correction. Only select one.

Status Report

This form is used to communicate the status of a project. Status reports should be done at least bi-weekly and can be done monthly if the parties agrees. The status report should show such things as the status of each phase of the project, what the overall status is, what the accomplishments were for the last reporting period, what the expected accomplishments will be for the next report period, and if there are any issues or problems. If status for a phase is behind schedule, you should explain why in the issues/problems area.

Sub-Projects:	If you have sub-projects defined for your project, you can select the sub-project(s) that the status report relates to.
Status Date:*	Indicates the date of the status report.
Status Comments:	This area can be used to record any information relating to this status report.
Initiator:*	Indicates who initiated the status report. Can only select 1 person.
Notifications:*	Select the individuals who are to be notified when the status report is submitted for review. Can select multiple individuals.
Attachments:	This area is used for storing the documents relating to the status report. The actual status report will be a document that is stored as an attachment. Status report templates are available.

Task Hour Change

This form is used to document any changes in baseline hours for any task on the project schedule. A Task Hour Change should be created whenever the baseline hours on the schedule need to be changed. The Project Manager on a project is responsible for completing the Task Hour Change. The Task Hour Change is also used to document where the hours from an Impact of Change should be allocated. This form is typically only used by project managers.

Short Description:*	Short description for the task hour change.
Description:*	Describe the reason for the task hour change.
From Task WBS No:	Indicates the WBS for the task from which hours are being taken.
To Task WBS No:	Indicates the WBS for the task to which hours are being given.
From Task Resource:	Indicates the resource from which hours are being taken.
To Task Resource:	Indicates the resource to which hours are being given.
Number of Hours:*	Indicates the number of hours.
Initiator:*	Indicates who initiated the task hour change. Can only select 1 person.
Assignee:*	Select the individual who is assigned to the task hour change. Can only select one person.
Notifications:*	Select the individuals who are to be notified when the task hour change is submitted. Can select multiple individuals.

Search Documents

- Used to search for the various documents for a project
- Search criteria is different for each project management form

Sub-Project

- Used to subdivide a project into workable parts.
- Allow project management forms to be tracked for each sub-project.

Name:*	Name of the sub-project
Short Name:*	Short name for the sub-project
Description:*	Describe the sub-project

Attachment C: Quick Guide

Logging In to WMS

- go to www.nd.gov/itd

Online Service Requests

WMS Use our automated system to request ITD services

- Click on the 'WMS' logo
- If you get a 'Security Alert' popup, select OK
- Login to WMS using your active directory account
- (Misc: Your WQ will be displayed)

Logging Out of WMS

- Select the 'Logout' link in the upper right gray-bar line

Getting around WMS

- Use two main links in upper left gray-bar line: "Main Menu" and "My Work Queue"

Selecting Departments (not available to all users)

- Select either the "Main Menu" or "My Work Queue" link
- Select the "Select Department" link in the middle right of the page (under the Logout link)

Adding a Work Order (does not go to ITD)

- Select 'Main Menu' link
- Select 'Add Work Order' link
- Fill in Required Fields (have '*') and Optional Fields
- Select 'Submit Work Order' button
- (Misc: Select 'My Work Queue' link: Work Order will appear in WQ until it is Closed and Removed)

Adding a Service Request (goes to ITD)

- From WQ, select 'Serv Req' link to right of Work Order #
- Select 'Add Service Request' button
- Select link for type of service request, e.g., 'Software Dev/GIS/Proj Mgmt'
- On first page of SR, fill in Required Fields (have '*') and Optional Fields
- Select 'Continue' button
- On second page of SR, fill n Required Fields (have '*') and Optional Fields
- Select 'Submit' button
- (Misc: Service Request will be submitted to ITD, and will not appear in WQ)

Assignment of a Service Request (ITD has started work)
- An email notification will be received with subject line:
  Request #1003933 - Assigned
- This email is informational only; no action is required on your part.

Approval of a Service Request (ITD needs your approval)
- An email notification will be received with subject line:
  Project 547 - Project Acceptance 1 - ASSIGNED
- From WQ, select the 'PM' link at top of page
- Look in the Project Management table for the Project # (column 1) and Doc Type (column 2)
- Select the Document '#' link
- Select the 'Approval Process' button
- Select the 'Approve' radio button and the 'Submit' button
- (Misc: Document will no longer appear in WQ)

Completion of a Service Request (ITD has completed work)
- An email notification will be received with subject line:
  Software Dev/GIS/Proj Mgmt Request #1003933 - Completed
- From WQ, select 'Close' link to right of Work Order #
- Select 'Close Work Order' button (to confirm)
- From WQ, select 'Remove' link to right of Work Order #
- (Misc: Work Order will no longer appear in WQ)