Request for WiTS System Enhancement
(Change Request)

WiTS System Enhancements encompass the **creation of new workflows, reports, dashboards and organizational units** that are requested based on our customers' business needs. Enhancements that are considered "major" and must be reviewed, ranked and prioritized by the HR Systems Advisory Committee (SAC). Enhancements that are considered "minor" and are reviewed, ranked and prioritized by the WiTS Project Manager. The time and cost estimate will be determined by the WiTS Project Manager after the Change Request is reviewed.

This document is meant to capture information related to your request. A WiTS Team member will assist you in completing this document if needed.

Title of Request:

Requestor Name, Title, Organization:

Approver Name, Title, Organization:

Date of Requirements Meeting(s) with BPM Team:

Date of Requirements Meeting(s) with WiTS Team:

Updated: 8.5.2013

To be completed by customer

Is this request in response to an NIH or higher-level mandate? ☐ Yes ☐ No If yes, please specify the mandate

Is this a request for a new: **workflow** ☐ **report** ☐ **organizational unit** ☐ **dashboard** ☐ (Check all that apply and complete the sections below that are applicable to your request)
Note: Most requests for workflows will also include requests for at least one report.

Please give us a brief description of the business need for this enhancement:

Please give us a brief description of the impact to your organization if this enhancement is not made:

Tell us about your new WiTS Organizational Unit(s)

Org Unit Specifications

Participants

Please list all of the participants in your new organizational unit:

User	Title	Role in Workflow

User	Title	Role in Workflow

Access

Please list all of the WiTS workflows/reports that the members of your new organizational unit will need access to:

Work Area Pages

Participants in WiTS workflows have their own “views” - called Work Area Pages. These Work Area Pages are broken into sections – called “bizcoves” – from which the users can initiate new actions, access actions which have been sent to them, track the actions which are pending for their organization and view reports. The WiTS Team uses a standard set of bizcoves to construct user’s Work Area Pages.

Please describe any bizcoves that you think may be needed for your new Org Unit’s Work Area Page(s):

In general, all members of a participant group are able to view all pending actions within the organizational unit from the *Active Transactions for Organization* bizcove. If there are any users who should not be able to see all active actions, please list them here and provide a reason.

Other Specifications

Please list any additional requirements or specifications about your new organizational unit not covered above that you think will help us meet your needs below:

Tell us about your new WiTS Workflow(s)

Workflow Specifications

Activities

The routing of the activities within your new WiTS workflow will be based on the process map(s) that has been established by the Business Process Management (BPM) Team and approved by you.

Routing

Usually, WiTS actions are assigned to employees by the selection of a staff name from a list on the form – WiTS knows to send the action to that person because he/she is identified up front (the "auto-assignment option"). However, you also have the option of having all actions sent to the entire unit. Each staff member would then be responsible for opening the action(s) that they are responsible for and assigning it to themselves (the "self-assignment" option).

How would you like work to be assigned to your workflow participants? ☐ Auto-Assignment ☐ Self-Assignment

Form Development

Form Structure

WiTS forms are the mechanism by which users input data into the system. The WiTS Team uses a standard format when creating forms that uses tabs to segregate the data. Please list the tabs that you think will be needed for your new WiTS form.

Data Fields

Using the format below for each tab, please list the data fields that you think will be needed to capture your needed data:

Field Name	Type of Data	Entry Method/Menu Choices	Mandatory?	If Mandatory, when?

Activity	Name	Participant	Responses

Email Notifications

WiTS workflows offer the ability to create automatic emails at certain points in the process. These emails help streamline communication and can also serve as reminders for actions that need to be taken. You have the ability to customize the content of these emails and when/how they are sent according to your organization's needs.

Triggers

Automatic emails can be directed to be sent from your workflow in a number of ways. They can be sent: 1) when the user chooses to send from the routing menu (the "opt in" option); 2) automatically when the user inputs data or takes another action (i.e. sends action to another participant) (the "action trigger" option); or 3) the system is told in advance to send the email after a certain time period has elapsed (for example, email will be sent after the action has been active for 20 days) (the "database" option).

Language

If you would like automatic emails included in your new WiTS workflow, please complete the information below:

Email Name	Email Purpose	Who Should Receive?	How Will It Be Triggered?	Language

Please list any additional requirements or specifications about your new workflow not covered above that you think will help us meet your needs below:

Tell us about your new WiTS Report(s)

Report Specifications

Current Report

If available, please provide a sample of the report(s) you are requesting be created in WiTS. This may be an Excel spreadsheet, a Word document, etc. If no report currently exists, please give us details about the data you would like to see in your report. Please be as descriptive as possible.

Parameter Page

All WiTS reports offer a parameter page which allows users to specify how their report should be generated and what data they would like displayed. Although the filters on the parameter pages vary by report, there are a standard set of filters which are common to the majority of reports. They are:

- **Status of Actions**: users can choose to filter by All Actions, Active Actions Only, or Completed Actions Only
- **Generate Report By**: users can choose to filter by a specified date (Rec'd in HR, Date Cert Sent to Selecting Official, etc.)
- **Admin Code**: users can choose to filter by a specific Admin Code within an IC
- **Generate Report Using**: users can choose to have any metrics calculated in "calendar days" or "working days"

If there are any specific filters you would like to see on your report, please list them here:

Metrics

WiTS metrics are counts of the time (days) elapsed between certain dates within a process (workflow). If you would like metrics included in your report, please list them here.

User Access

Usually, all participants in a process (workflow) are given the ability to access the report(s) associated with that process. If there are users who will be participants in the workflow associated with your report who should NOT have such access, please list them here and provide a brief explanation.

Other Specifications

Please list any additional requirements or specifications about your new report(s) not covered above that you think will help us meet your needs below:

Tell us about your new WiTS Dashboard(s)

Current Report

If available, please provide a sample of the data you are requesting be created as a dashboard in WiTS. This may be an Excel spreadsheet, a Word document, etc. If no report currently exists, please give us details about the data you would like to see in your report. Please be as descriptive as possible.

User Access

Usually, all participants in a process (workflow) are given the ability to access the dashboard(s) associated with that process. If there are users who will be participants in the workflow associated with the data your dashboard(s) will display who should NOT have such access, please list them here and provide a brief explanation.

Other Specifications

Please list any additional requirements or specifications about your new dashboard(s) not covered above that you think will help us meet your needs below:

I/we certify that the above represents the baseline requirements for the enhancements(s) requested. I/we understand that the HR SAID WiTS Team will estimate the baseline level of effort needed to complete this system modification based on the above specifications and will outline the technical work used to compute the estimate below. I/we also acknowledge that the estimated level of effort that the WiTS Team prepares may increase as requirements are refined.

Requestor signature

Approver signature

To be completed by WiTS Team

CR #

Estimated Hours:

Estimated Cost:

Targeted Start Date:

Targeted Completion Date:

The WiTS Team certifies that the above estimate represents the approximate level of effort for the baseline requirements listed above. The customer may identify additional specifications as the work is performed and that the inclusion of any additional of requirements will be at the discretion of the WiTS Project Manager.

WiTS Project Manager

Customer Acknowledgement of Estimate

I/we understand that this estimate is based on the technical work needed to complete the work needed to satisfy the initial requirements. I/we also acknowledge that the estimated level of effort/cost/target for completion may increase as requirements are refined. Additional changes to requirements not outlined above may necessitate the submission of a Change Request at the discretion of the WiTS Project Manager.

Requestor signature

Approver signature

Actual Hours:

Actual Cost:

Actual Start Date:

Actual Completion Date:

Receipt of Work Product

I/we certify that the final work product has been delivered by the WiTS Team based on the specified and agreed-upon requirements. I/we understand that any further modifications to this product will necessitate the submission of a Change Request to the WiTS Project Manager, and, depending on the level of effort required, may need to be reviewed, rated and prioritized by the HR Systems Advisory Committee (SAC) before work is scheduled.

Requestor signature

Approver signature