

Request for WiTS System Enhancement (Change Request)



WiTS System Enhancements encompass **modifications to 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:

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 to modify a: **workflow** **report** **organizational unit** (Check all that apply and complete the sections below that are applicable to your request)
dashboard

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:

Changes to your WiTS Organizational Unit(s)



Org Unit Modifications

Participants

Please list any changes to the participants in your organizational unit:

User

Title

Role in Workflow

User

Title

Role in Workflow



Access

If the WiTS workflows/reports/dashboards that the members of your organizational unit will need to access is changing, please describe:

Work Area Pages

Participants in WiTS workflows have their own “views” - called Work Area Pages. These Work Area Pages are broken into sections – called “bizcovers” – 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 bizcovers to construct user’s Work Area Pages.

Please describe any changes to the bizcovers in your Org Unit’s Work Area Page(s) that you think may be needed:

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* bizcover. If the current user access is changing, please list the change below and provide a reason.

Other Specifications

Please list any additional changes in your organizational unit not covered above that you think will help us meet your needs below:

Changes to your WiTS Workflow(s)

Workflow Modifications

Please describe the change you are requesting.

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).

Will there be changes to the routing method in your workflow? Yes No If yes, please select the new method below:

Auto-Assignment Self-Assignment

Form Modifications

Data Fields

Will there be any changes to your data fields ? Yes No If yes, please list each field and what will be changing below:

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

Type of Data

Entry Method/Menu Choices

Mandatory?

If Mandatory, when?



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).

Will there be changes to your email notifications? Yes No If yes, please provide the information below:

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

Email Purpose

Who Should Receive?

How Will It Be
Triggered?

Language

Other Specifications

Please list any additional changes to your new workflow not covered above that you think will help us meet your needs below:

Changes to your WiTS Report(s)

Report Modifications

Please describe the change you are requesting.

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. If there are any specific filters you would like added, modified or removed from your report's parameter page, 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 changes made to the 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 the current user access will be changed, please indicate the change below and provide a brief explanation.

Other Specifications

Please list any additional changes you would like made to your report(s) not covered above that you think will help us meet your needs below:

Changes to your WiTS Dashboard(s)

Please describe the change you are requesting.

User Access

Usually, all participants in a process (workflow) are given the ability to access the dashboard(s) associated with that process. If the current user access will be changed, please indicate the change below and provide a brief explanation.

Other Specifications

Please list any additional changes to your 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
