The University Of Sheffield.

CIS Enhancements System Guide for Users.

CiCS

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December 2010

AP-CIS4

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1. Introduction

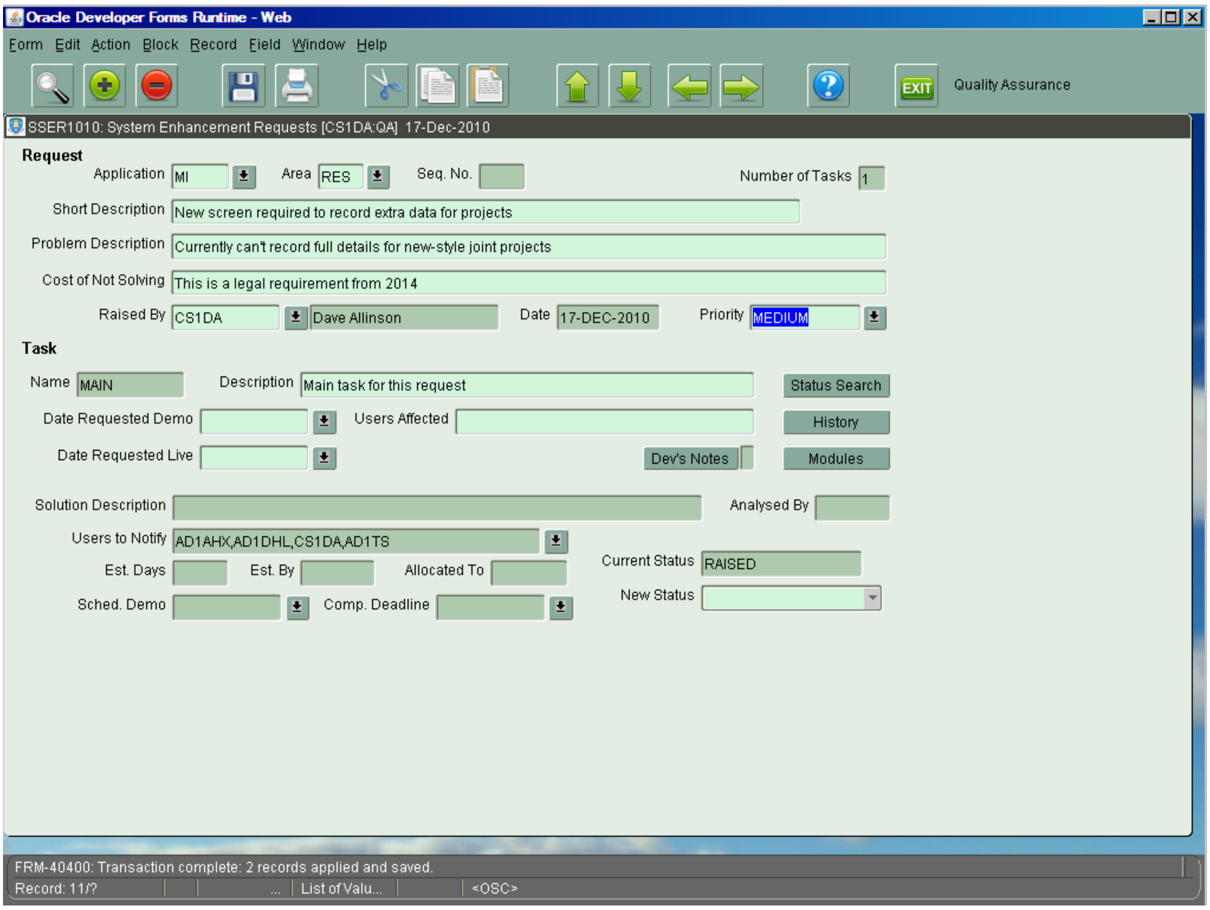
The Enhancements System is available to staff using the Corporate Information System in MUSE. It allows users to make requests for changes to computer systems and to monitor the progress of these requests. It is designed for three types of user:

- General User - any user of CIS
- Key User - a user responsible for approving requests in their area
- Developer - someone who will make the requested changes

2. Checking if a Similar Request has been Raised

Before raising a new enhancement request you will need to check if a similar one has already been requested. Log on to the Corporate Information System and on the first screen select **Enhancements** from the **Administration** menu. A screen with blank fields will be displayed. You can search on most of the fields in the **Request** block at the top.

Tip: Use **%** as a wild card character to search for key words in the description fields, e.g. entering **%budget%** in **Short Description** and then clicking the **Search for SER** icon on the tool bar will find all enhancements with 'budget' in the Short Description. Combining this with entering the relevant **Application** code will often return the desired results. The screen will look similar to that shown below.



If you know the full reference for an existing enhancement and want to check on its progress or make changes to it, you can just enter the **Application**, **Area** and **Seq. No.** before performing the search. If you are interested in those enhancements which you yourself have requested, enter your user name in the **Raised By** field before performing the search.

3. Requesting a New Enhancement or Correction

To request a new system enhancement or correction, take the following steps:

1. Log on to the Corporate Information System and on the first screen select Enhancements from the Administration menu.
2. Click the 'Create SER' icon on the tool bar.
3. Select the Application and Area the request relates to.
4. Enter a brief description of the request in the Short Description field.
5. Enter relevant information in the Problem Description and Cost of Not Solving fields (double-clicking on these fields displays an editing box).
6. Click on the 'Save' icon on the tool bar.

The request has now been registered and a task called 'main' automatically created for the request, with its current status set to **RAISED**. the relevant key user is automatically notified by email so they will know the task needs to be approved.

4. Approving a Task (Key Users Only)

Once a user has raised a request, the Key User should enter the **Problem Description**, **Cost of Not Solving** and **Priority** if these haven't already been entered satisfactorily. If the request was raised with the wrong application or area then they must be changed at this point.

If correction of a bug is being requested (i.e. correction of an obvious fault rather than an improvement), the **Priority** field should be set to **'BUG'**. If different priorities need to be given to various parts of a request, separate requests should be raised instead, so that each can have its own priority assigned. Any change of **Priority** will be shown in the history log for a request's **'MAIN'** task. Definitions of possible priorities are shown below.

BUG *- the system does not work the way it was specified. Requests with this status will be looked at within one working day and serious bugs fixed as a top priority.*

HIGH *- must be done as no work around possible. For example, changes imposed by external bodies such as HESA, UCAS or the Inland Revenue, or changes imposed by changes in University policy or strategy. These requests will be resourced to meet the dates by which they are expected. If this is not achievable then people will be informed as soon as possible so that further action may be taken.*

MEDIUM *- significant benefits if implemented, to save time or to increase accuracy of data. Requests with this status will be done in the order that the users agree to, after the Bug and High priority work is completed.*

LOW *- desirable but essentially cosmetic changes. Low priority requests will be picked up as and when resources allow.*

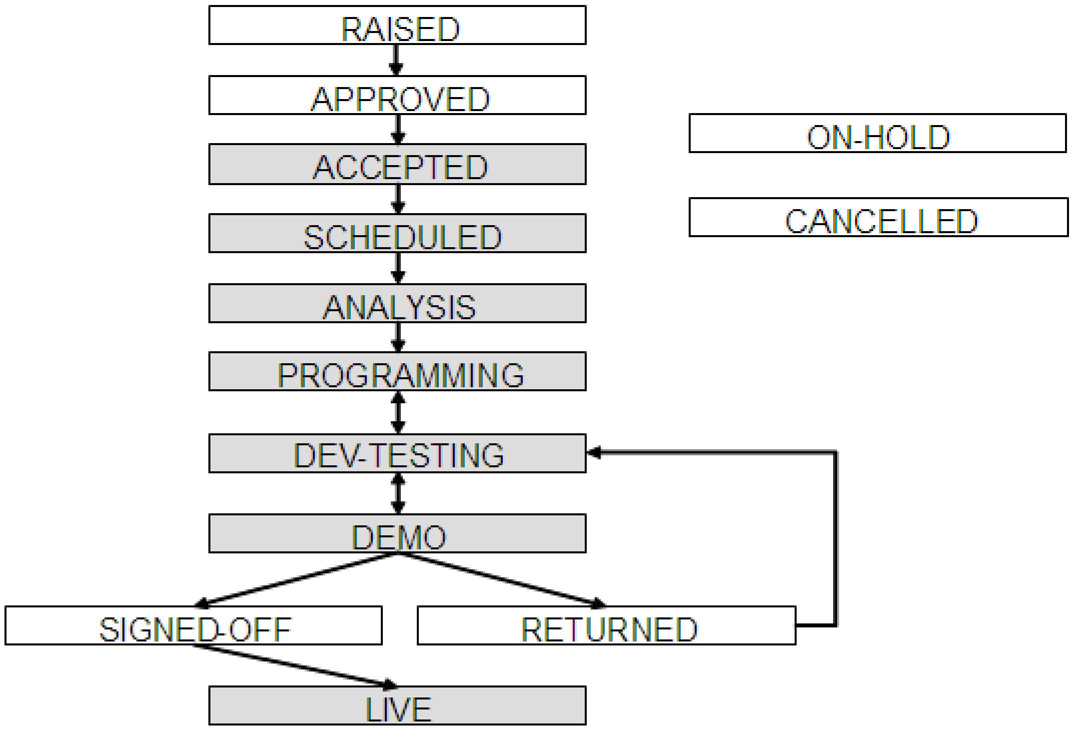
On the task record in the lower half of the screen, text must be entered in the **Users Affected** field. **Date Requested Demo** and/or **Date** Re**q**uested **Live** may also be entered (the latter is mandatory if **'HIGH'** priority has been selected).

The status of the task can then be changed from **RAISED** to **APPROVED**, indicating that it is ready for a Developer to look at. This is done by selecting **APPROVED** in the **New Status** field and clicking the **Save** icon. On making a status change a comment can be entered if desired. This comment will be included on system emails and can subsequently be viewed on the **History** screen.

On approving a task the **Seq**. **No**. field for the request is automatically populated. An email is sent to each of the users listed in the **Users to Notify** field (excluding yourself) informing them that the task has been approved. If the request ought not to be approved for any reason the Key User should change the status of **CANCELLED** instead (please note that cancellation cannot be reversed).

5. Understanding the Life-Cycle of a Task

Every task passes through a status life-cycle similar to that shown below. Some stages are optional. Only Developers can change the status to those shown in shaded boxes.



Every time the status of a task changes an entry is made in the history log, which may be viewed by clicking the **History** button. Each line shows the new status, the user who made the change, the date and time of the change and any comment that was entered.

The status can be changed to **ON-HOLD** if a delay in work on the request is necessary, and then to **OFF-HOLD** when work can continue.

Developers will sometimes create extra tasks for a request in order to divide it into appropriate units of work. In this case each task will follow its own status life-cycle and each can be tested and signed-off separately.

6. How to Sign-Off a Task

When the status of a task has been changed to **DEMO** by a Developer and you are satisfied that the work has been completed (usually having tested it in **Demo**), you should change the status to **SIGNED-OFF**, by selecting '**SIGNED-OFF**' in the **New Status** field and clicking the **Save** icon. This indicates that you agree that the changes can now be transferred to Live.

A task can be signed off either by the user who raised the request originally or by a Key User for the relevant area. Developers are also able to sign off tasks on requests with a status of **'BUG'**.

If instead you think there is still a problem which needs resolving, you should discuss this with the relevant Developer and then change the status of the task to **RETURNED** instead of **SIGNED-OFF**. Make sure you enter full details of the problem in the status change comment. The Developer will change the status back to **DEMO** when the enhancement is ready for you to test again.

7. Advanced Searching

If you want to perform more complex searches for existing requests, a **Status Search** facility is provided. When the **Status Search** button is clicked, a special panel appears. Two alternative search modes are available:

1. Find tasks **having selected status between dates** - this finds all tasks which existed with the selected **Status** at any time on or between the **From** and **To** dates.

2. Find tasks **changed to selected status between dates** - this finds all tasks which had their status changed to the selected **Status** on or between the **From** and **To** dates.

For instance, to find tasks which were raised in the last week you would choose the second search mode, select status of **RAISED**, and enter a date range of from a week ago until today. You could also enter a specific **Application** you were interested in. Clicking on the **Search** button returns records which meet the search criteria, which you can then view and amend as normal.