



***AbilitySuite® (R3)***

**Advanced Lifecycle Management Module**

**User Manual**

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## Using AdaptAbility Databases (Intro)

AdaptAbility provides a rich user experience by giving the user the ability to complete tasks simply and quickly. All applications built with AdaptAbility have a common look and feel. Once users have familiarized themselves with this look and feel, they will find it easy to navigate around a database, search for information, create new documents and carry out actions that have been assigned to them.

For this section of the Training Guide, we will show you all of these elements within a Customer Support database built with AdaptAbility.

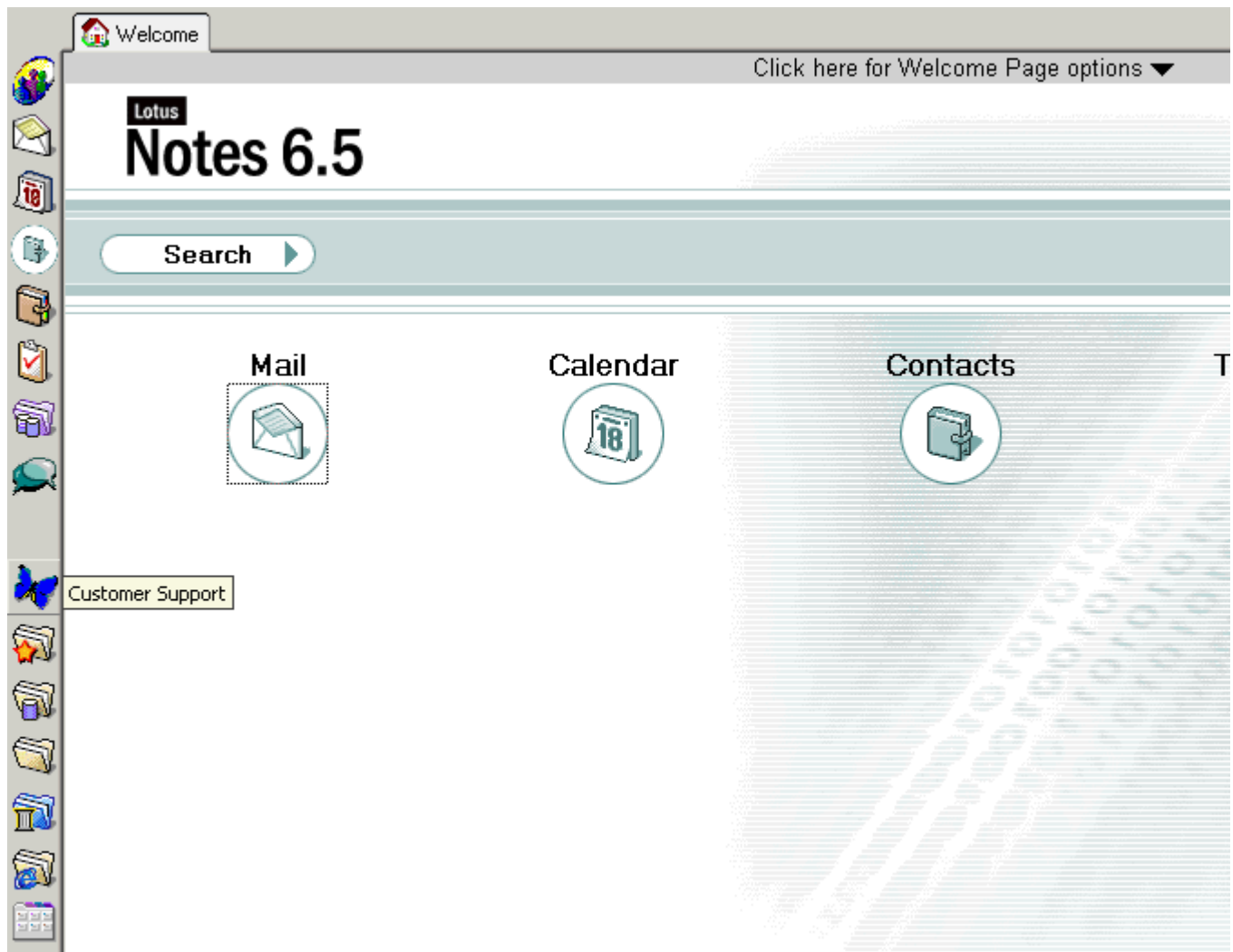
## Opening an AdaptAbility

To launch your **AdaptAbility** application, you can (a) double-click on the respective icon from your Lotus® Notes Workspace (Fig 1.), (b) double-click on the icon shown on the left-hand tool-bar (Fig 2.), or (c) double-click on the application icon located in your Favourites folder (Fig 3.). In this example we are using a Customer Support database.

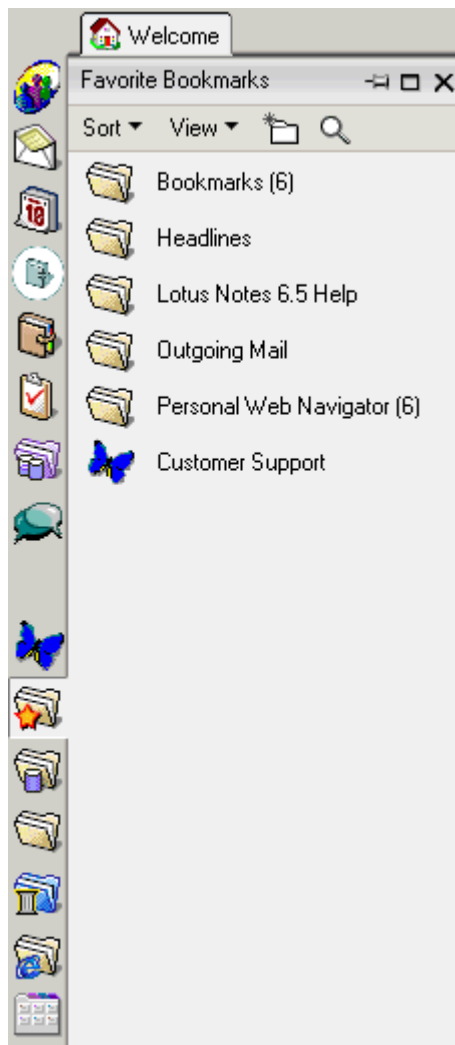
(Fig 1)



(Fig 2)

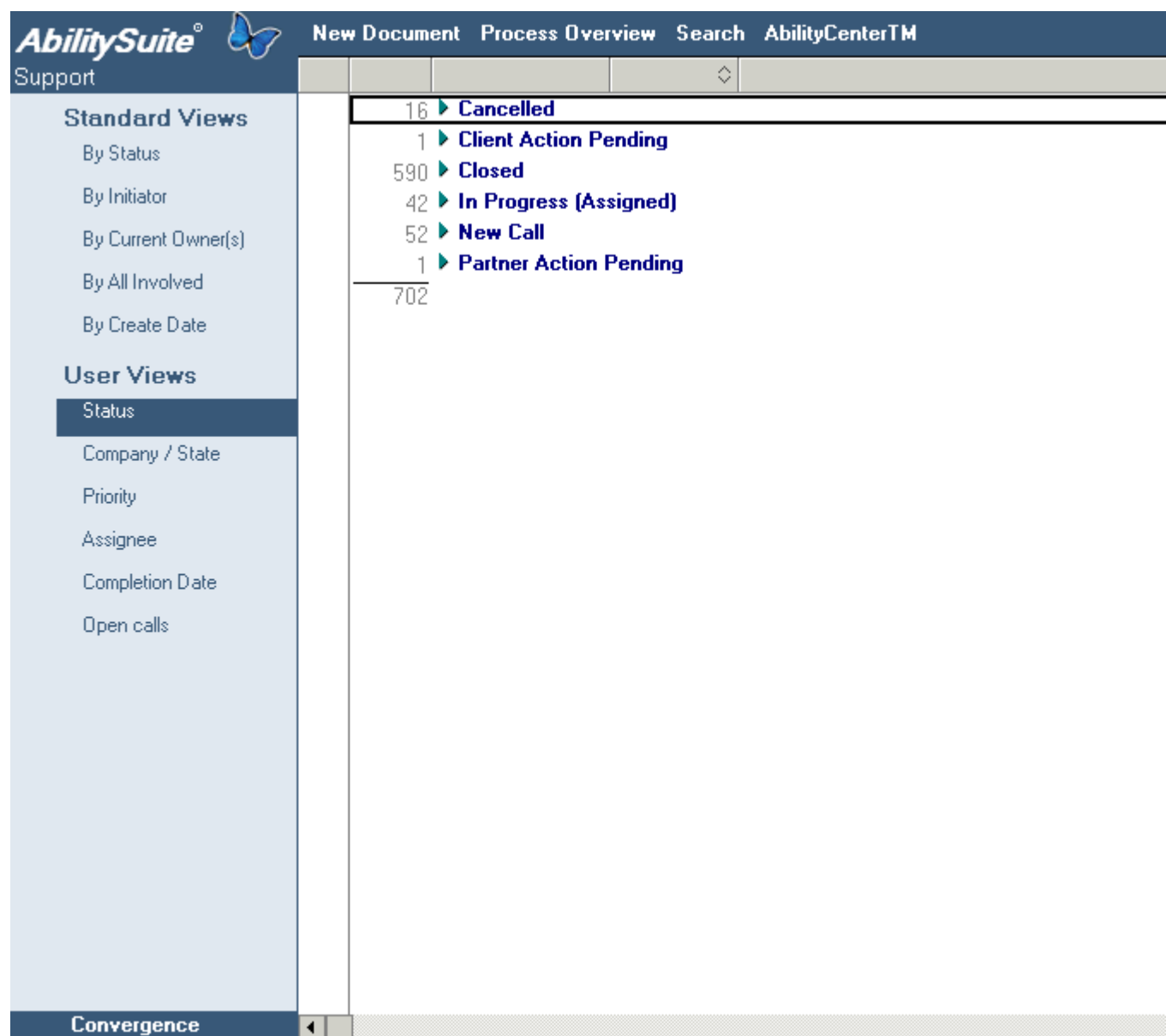


(Fig 3)



This will open the main screen of the specific AdaptAbility™ application. From this screen we can search for information and documents in the application as well as create new support calls (new document). See Fig 4.

(Fig 4)



## Searching for Documents

You can search for documents stored within this application quickly and easily. First, click on the "Search" option from the main toolbar as shown in Fig 1.

(Fig 1)



This will provide an extensive search interface based on the main categories used as references against documents (see Fig 2).

(Fig 2)

Search Now   Reset   Selection Summary	
<b>Support Search</b>	
Basic Categories   More Categories	
Order Number	<input type="text"/>
Company Name	<input type="text"/>
Subject	<input type="text"/>
Priority	<input type="text"/>
Planned Completion Date	<input type="text"/>
Account Manager	<input type="text"/>
Assign To	<input type="text"/>
Product	<input type="text"/>
Applicable Technology	<input type="text"/>
Call Type	<input type="text"/>
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Additional categories can be selected, if desired, in order to narrow down the search simply by clicking on the "More Categories" tab as shown in Fig 3.

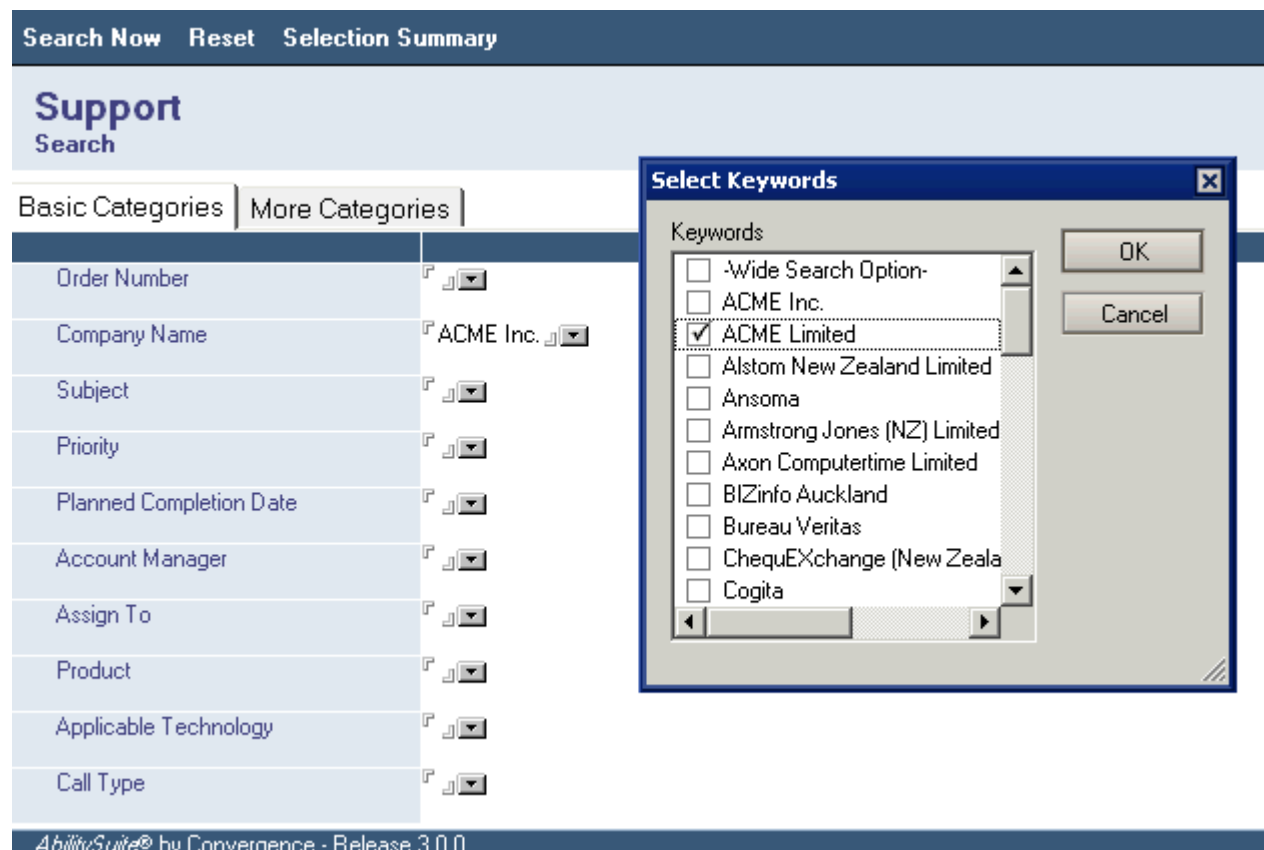
(Fig 3)

Search Now   Reset   Selection Summary	
<b>Support Search</b>	
Basic Categories   More Categories	
Title Includes	<input type="text"/>
Status	<input type="text"/>
Initiator(s)	<input type="text"/>
Recipient(s)	<input type="text"/>
Involved	<input type="text"/>
Created	<input type="text"/> On any date
Last Modified	<input type="text"/> On any date
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### Search Examples

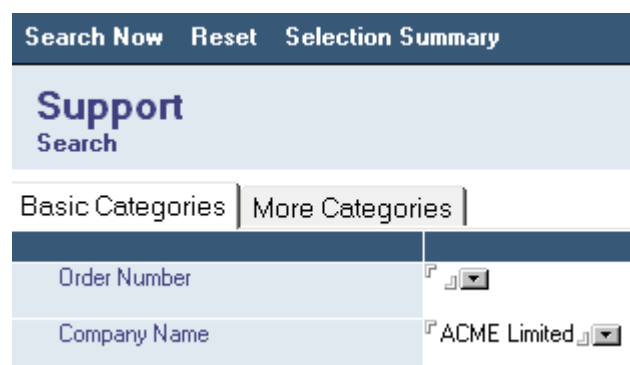
Each category provides a drop-down menu to allow you to select one or more values. In the following example, simply click on the down arrow in the category "**Company Name**." You are then given a list of companies with checkboxes to the left. You can select a single company or multiple company names if desired (refer to Fig 4) and once selected, click on OK.

(Fig 4)



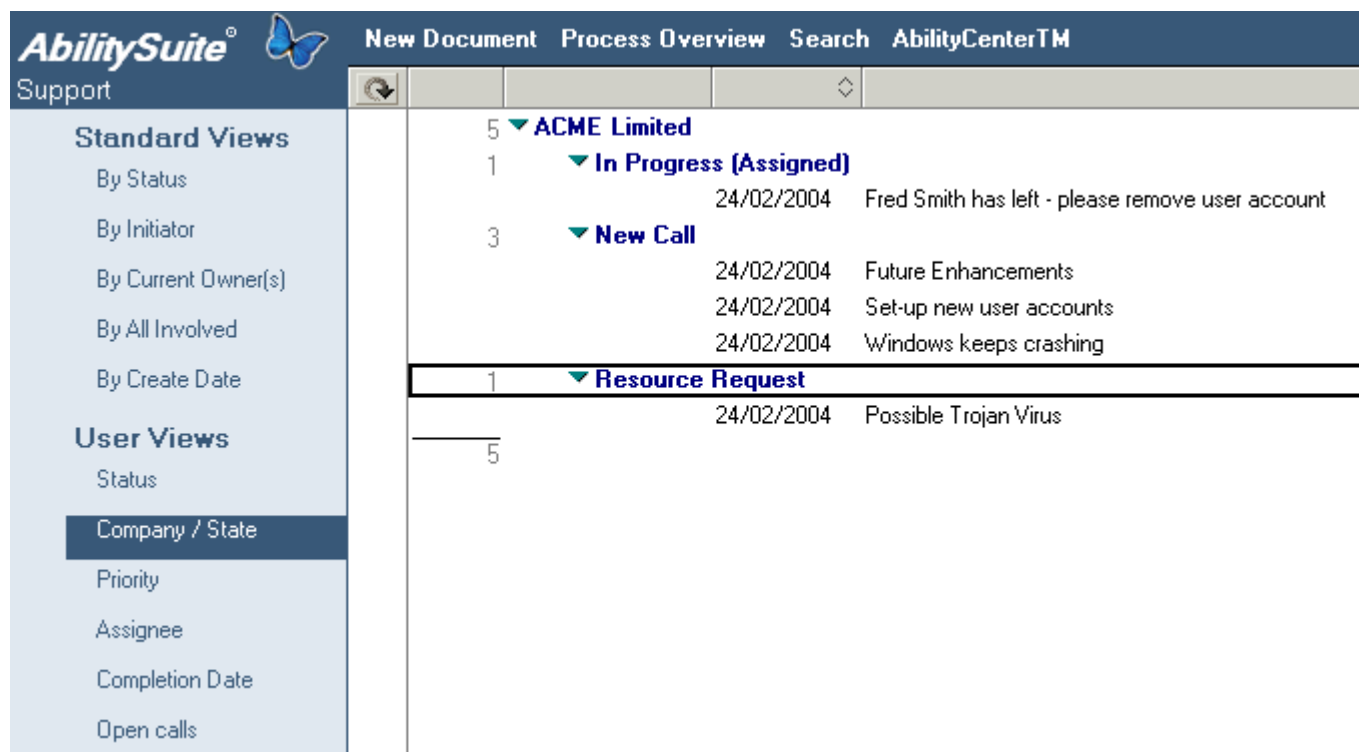
If you click on the '**Search Now**' button, you can execute a wide search of all support calls logged for this company (Acme Limited) as shown in Fig 5.

(Fig 5)



This will return a set of results as shown in Fig 6 displayed by "state."

(Fig 6)



The screenshot displays the 'AbilitySuite' Support interface. The top navigation bar includes 'New Document', 'Process Overview', 'Search', and 'AbilityCenter™'. A left sidebar contains 'Standard Views' (By Status, By Initiator, By Current Owner(s), By All Involved, By Create Date) and 'User Views' (Status, Company / State, Priority, Assignee, Completion Date, Open calls). The main area shows a list of calls for 'ACME Limited'.

Count	Status	Date	Description
5	ACME Limited		
1	In Progress (Assigned)	24/02/2004	Fred Smith has left - please remove user account
3	New Call	24/02/2004	Future Enhancements
		24/02/2004	Set-up new user accounts
		24/02/2004	Windows keeps crashing
1	Resource Request	24/02/2004	Possible Trojan Virus
5			

You can simply double-click on the document you wish and the form is promptly displayed (Fig 7).

(Fig 7)



Action	New Document	Views	Process Overview	Search	AbilityCenter™																						
<h2>Support</h2> <h3>Support Request</h3>																											
Current Status : Resource Request Currently owned by Ross Mitchell					C Last m																						
<div> <div>Main Document</div> <div>Sub-documents</div> <div>History</div> </div>																											
<table border="1"> <tr> <td>Order Number</td> <td>1234</td> </tr> <tr> <td>Company Name</td> <td>ACME Limited</td> </tr> <tr> <td>Subject</td> <td>Possible Trojan Virus</td> </tr> <tr> <td>Priority</td> <td>High ▾</td> </tr> <tr> <td>Planned Completion Date</td> <td>24/02/2004 16</td> </tr> <tr> <td>Account Manager</td> <td>▾</td> </tr> <tr> <td>Assign To</td> <td>+ -</td> </tr> <tr> <td>Product</td> <td>+ -</td> </tr> <tr> <td>Details</td> <td>           ▾ <a href="#">Details</a>            This test call is an example of how you can use AdaptAbility™ more effectively.         </td> </tr> <tr> <td>Applicable Technology</td> <td>+ -</td> </tr> <tr> <td>Attachments</td> <td>▶ <a href="#">Attachments</a></td> </tr> </table>						Order Number	1234	Company Name	ACME Limited	Subject	Possible Trojan Virus	Priority	High ▾	Planned Completion Date	24/02/2004 16	Account Manager	▾	Assign To	+ -	Product	+ -	Details	▾ <a href="#">Details</a> This test call is an example of how you can use AdaptAbility™ more effectively.	Applicable Technology	+ -	Attachments	▶ <a href="#">Attachments</a>
Order Number	1234																										
Company Name	ACME Limited																										
Subject	Possible Trojan Virus																										
Priority	High ▾																										
Planned Completion Date	24/02/2004 16																										
Account Manager	▾																										
Assign To	+ -																										
Product	+ -																										
Details	▾ <a href="#">Details</a> This test call is an example of how you can use AdaptAbility™ more effectively.																										
Applicable Technology	+ -																										
Attachments	▶ <a href="#">Attachments</a>																										
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In applications that contain a high volume of documents, the ability to refine searches saves time. In the following example, we will search for support calls logged by **'Acme Limited'** that have a **'High'** priority and relate to the **'Windows NT'** technology category. See Fig 8.

In addition to this we will refine the search further by choosing the 'More Categories' tab and stating that we only want to see calls logged after 1st February 2004. See Fig 9.

(Fig 8)

Search Now   Reset   Selection Summary	
<b>Support Search</b>	
Basic Categories   More Categories	
Order Number	<input type="text"/>
Company Name	<input type="text" value="ACME Limited"/>
Subject	<input type="text"/>
Priority	<input type="text" value="High"/>
Planned Completion Date	<input type="text"/>
Account Manager	<input type="text"/>
Assign To	<input type="text"/>
Product	<input type="text"/>
Applicable Technology	<input type="text" value="Windows NT"/>
Call Type	<input type="text"/>
AbilitySuite® by Convergence - Release 3.0.0	

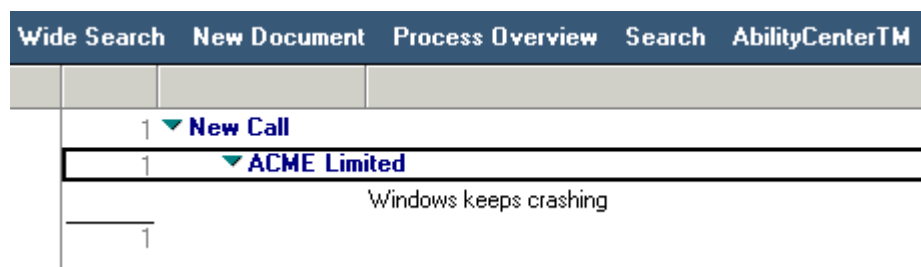
(Fig 9)

Search Now   Reset   Selection Summary	
<b>Support Search</b>	
Basic Categories   More Categories	
Title Includes	<input type="text"/>
Status	<input type="text"/>
Initiator(s)	<input type="text"/>
Recipient(s)	<input type="text"/>
Involved	<input type="text"/>
Created	<input type="text" value="After"/> <input type="text" value="1/02/2004"/>
Last Modified	<input type="text" value="On any date"/>
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**Select Keywords**  
 Keywords  
 After  
 Before  
 Between  
 More recently than  
 Earlier than  
 On any date

Now, when you press "**Search Now**" a specific set of results will be delivered as shown in Fig 10.

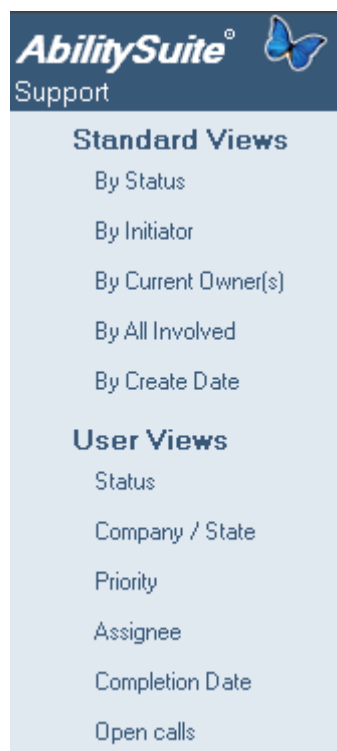
(Fig 10)



## Opening a View

In addition to the '**Category Search**' functionality, the other useful way to find information within AdaptAbility™ is through opening '**Views**' which present the documents in a pre-defined sort order. To access the views screen simply click the sort order you wish from the left-hand side-bar on the opening AdaptAbility™ screen as shown in Fig 1 below.

(Fig 1)



An AdaptAbility™ application can have up to five standard views as well as six user views (five normal and one calendar). The creator of this support application has configured the views to enable users to view documents in the following ways:

- **By Status**
- **By Company / State**
- **By Priority**
- **By Assignee**
- **By Completion Date**
- **By Open calls**

The first view in this example is by '**Status**' and shows us all documents in this application, pre-sorted by their respective stage in the process (Fig 2).

(Fig 2)

AbilitySuite®		New Document	Process Overview	Search	AbilityCenter™
Support					
<b>Standard Views</b>		1	▼ In Progress (Assigned)		
By Status		1	▼ ACME Limited		
By Initiator				24/02/2004	Fred Smith has left - please remove user account
By Current Owner(s)		3	▼ New Call		
By All Involved		3	▼ ACME Limited		
By Create Date				24/02/2004	Future Enhancements
				24/02/2004	Set-up new user accounts
				24/02/2004	Windows keeps crashing
<b>User Views</b>		1	▼ Resource Request		
Status		1	▼ ACME Limited		
Company / State				24/02/2004	Possible Trojan Virus
Priority		5			
Assignee					
Completion Date					
Open calls					

By selecting the 'Company / State' view, we can look for a specific organisation and see all calls logged for that company and where they are in the process. See Fig 3.

(Fig 3)

AbilitySuite®		New Document	Process Overview	Search	AbilityCenter™
Support					
<b>Standard Views</b>		5	▼ ACME Limited		
By Status		1	▼ In Progress (Assigned)		
By Initiator				24/02/2004	Fred Smith has left - please remove user account
By Current Owner(s)		3	▼ New Call		
By All Involved				24/02/2004	Future Enhancements
By Create Date				24/02/2004	Set-up new user accounts
				24/02/2004	Windows keeps crashing
<b>User Views</b>		1	▼ Resource Request		
Status				24/02/2004	Possible Trojan Virus
Company / State		1	▼ Convergence Limited		
Priority		1	▼ Client Action Pending		
Assignee				24/02/2004	AdaptAbility™ adds more power to Lotus® Notes
Completion Date		2	▼ IBM New Zealand Limited		
Open calls		1	▼ New Call		
				24/02/2004	Presence Awareness of Lotus® Notes 6.5
<b>Configuration</b>		1	▼ Resource Request		
				24/02/2004	WebSphere Portal Server Express
		1	▼ Microsoft New Zealand Limited		
		1	▼ New Call		
				24/02/2004	Migrating from Exchange to Notes/Domino
		9			


If you require a new 'View,' you should contact your Database Administrator who will easily be able

to change existing views or add additional views, up-to a maximum of six (5 normal and 1 calendar) per AdaptAbility™ application.

## Opening a Document

After finding a document by executing a search or selecting from a pre-defined view (see the results in Fig 1 below), the document can be opened by simply double-clicking your mouse on the selected document (Fig 2).

(Fig 1)

AbilitySuite®  New Document Process Overview Search AbilityCenter™			
Support			
<b>Standard Views</b>	5	▼ ACME Limited	
By Status	1	▼ In Progress (Assigned)	
By Initiator		24/02/2004	Fred Smith has left - please remove user account
By Current Owner(s)	3	▼ New Call	
By All Involved		24/02/2004	Future Enhancements
By Create Date		24/02/2004	Set-up new user accounts
		24/02/2004	Windows keeps crashing
<b>User Views</b>	1	▼ Resource Request	
Status		24/02/2004	Possible Trojan Virus
<b>Company / State</b>	1	▼ Convergence Limited	
Priority	1	▼ Client Action Pending	
Assignee		24/02/2004	AdaptAbility™ adds more power to Lotus® Notes
Completion Date	2	▼ IBM New Zealand Limited	
Open calls	1	▼ New Call	
		24/02/2004	Presence Awareness of Lotus® Notes 6.5
<b>Configuration</b>	1	▼ Resource Request	
		24/02/2004	WebSphere Portal Server Express
	1	▼ Microsoft New Zealand Limited	
	1	▼ New Call	
		24/02/2004	Migrating from Exchange to Notes/Domino
	9		

(Fig 2)

Action	New Document	Views	Process Overview	Search	AbilityCenter™
<h2>Support</h2> <h3>Support Request</h3>					
Current Status : New Call Currently owned by Darren Tong,Gordon Inkson,Peter Molyneux,Ross Mitchell,Support Team					Cre Last mo
Main Document		Sub-documents		History	
Order Number*	5432				
Company Name*	<div>+</div> <div>-</div> Microsoft New Zealand Limited				
Subject*	Migrating from Exchange to Notes/Domino				
Priority	Medium				
Planned Completion Date	01/04/2004 <div>16</div>				
Account Manager	<div>+</div> <div>-</div>				
Assign To	<div>+</div> <div>-</div>				
Product	<div>+</div> <div>-</div> Ability Suite - All				
Details	<div>▼</div> <b>Details</b> Customer has decided to switch from Exchange 5.5 to Domino 6.5 due to issues concerning migration of ownership. The Notes 6.5 client with integrated presence awareness and instant messaging, along with AbilitySuite® have reinforced this significant decision as being the best for the business.				
Applicable Technology	<div>+</div> <div>-</div>				
Call Type	Support Call				
Attachments	<div>▶</div> <b>Attachments</b>				

## Composing a Document

To begin the process of composing a document in your AdaptAbility™ application, click on the **'New Document'** button from the top toolbar in the main AdaptAbility™ screen (see Fig 1).

(Fig 1)

New Document	Process Overview	Search	AbilityCenter™
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In this example, we will compose a new support request within a Customer Support AdaptAbility™ application. Clicking on **'New Document'** will take us to a blank main form for this particular application. Note that different AdaptAbility™ applications have different types of fields and will be labelled according to the information that needs to be completed. However, a common design across all AdaptAbility™ applications is the use of the asterisk shown as \*. Any field labels marked with an \* are mandatory and must be completed before the document can be saved or moved on to the next **'State'** in the process. See Fig 2.

(Fig 2)

Action	New Document	Views	Process Overview	Search	AbilityCenter™
<h2>Support</h2> <h3>Support Request</h3> <p>Current Status : New Call Currently owned by Vaughan Nankivell</p>					
<div> <div>Main Document</div> <div>Sub-documents</div> <div>History</div> </div>					
Order Number*	<input type="text"/>				
Company Name*	<input type="text"/>				
Subject*	<input type="text"/>				
Priority	<input type="text" value="Medium"/>				
Planned Completion Date	<input type="text" value="16"/>				
Account Manager	<input type="text"/>				
Assign To	<input type="text"/>				
Product	<input type="text"/>				
Details	<a href="#">Details</a>				
Applicable Technology	<input type="text"/>				
Call Type	<input type="text" value="Support Call"/>				
Attachments	<a href="#">Attachments</a>				
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In the first instance, complete the information required in the fields, ensuring that all fields marked as mandatory are completed. See Fig 3.

(Fig 3)

Action	New Document	Views	Process Overview	Search	AbilityCenter™																								
<h2>Support</h2> <h3>Support Request</h3> <p>Current Status : New Call Currently owned by Vaughan Nankivell</p>																													
<div> <div>Main Document</div> <div>Sub-documents</div> <div>History</div> </div>																													
<table border="1"> <tr> <td>Order Number*</td> <td>11001100111</td> </tr> <tr> <td>Company Name*</td> <td> <div>+</div> <div>-</div>           ACME Limited         </td> </tr> <tr> <td>Subject*</td> <td>Installation of new AdaptAbility™ application</td> </tr> <tr> <td>Priority</td> <td>High</td> </tr> <tr> <td>Planned Completion Date</td> <td> <div>16</div> </td> </tr> <tr> <td>Account Manager</td> <td> <div>1</div> </td> </tr> <tr> <td>Assign To</td> <td> <div>+</div> <div>-</div> </td> </tr> <tr> <td>Product</td> <td> <div>+</div> <div>-</div>           AdaptAbility         </td> </tr> <tr> <td>Details</td> <td> <a href="#">Details</a> </td> </tr> <tr> <td>Applicable Technology</td> <td> <div>+</div> <div>-</div> </td> </tr> <tr> <td>Call Type</td> <td>Phone Support</td> </tr> <tr> <td>Attachments</td> <td> <a href="#">Attachments</a> </td> </tr> </table>						Order Number*	11001100111	Company Name*	<div>+</div> <div>-</div> ACME Limited	Subject*	Installation of new AdaptAbility™ application	Priority	High	Planned Completion Date	<div>16</div>	Account Manager	<div>1</div>	Assign To	<div>+</div> <div>-</div>	Product	<div>+</div> <div>-</div> AdaptAbility	Details	<a href="#">Details</a>	Applicable Technology	<div>+</div> <div>-</div>	Call Type	Phone Support	Attachments	<a href="#">Attachments</a>
Order Number*	11001100111																												
Company Name*	<div>+</div> <div>-</div> ACME Limited																												
Subject*	Installation of new AdaptAbility™ application																												
Priority	High																												
Planned Completion Date	<div>16</div>																												
Account Manager	<div>1</div>																												
Assign To	<div>+</div> <div>-</div>																												
Product	<div>+</div> <div>-</div> AdaptAbility																												
Details	<a href="#">Details</a>																												
Applicable Technology	<div>+</div> <div>-</div>																												
Call Type	Phone Support																												
Attachments	<a href="#">Attachments</a>																												
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Once the fields are completed click on the '**Action**' button from the main toolbar to select the appropriate next step. See Fig 4.

(Fig 4)



Action	New Document	Views	Process Overview	Search	AbilityCenter™																								
<h2>Support</h2> <h3>Support Request</h3> <p>Current Status : New Call Currently owned by Vaughan Nankivell</p>																													
<div> <div>Main Document</div> <div>Sub-documents</div> <div>History</div> </div> <table border="1"> <tr> <td>Order Number*</td> <td>11001100111</td> </tr> <tr> <td>Company Name*</td> <td>ACME Limited</td> </tr> <tr> <td>Subject*</td> <td>Installation of new AdaptAbility™ application</td> </tr> <tr> <td>Priority</td> <td>High</td> </tr> <tr> <td>Planned Completion Date</td> <td>16</td> </tr> <tr> <td>Account Manager</td> <td></td> </tr> <tr> <td>Assign To</td> <td></td> </tr> <tr> <td>Product</td> <td>AdaptAbility</td> </tr> <tr> <td>Details</td> <td>Details</td> </tr> <tr> <td>Applicable Technology</td> <td></td> </tr> <tr> <td>Call Type</td> <td>Phone Support</td> </tr> <tr> <td>Attachments</td> <td>Attachments</td> </tr> </table>						Order Number*	11001100111	Company Name*	ACME Limited	Subject*	Installation of new AdaptAbility™ application	Priority	High	Planned Completion Date	16	Account Manager		Assign To		Product	AdaptAbility	Details	Details	Applicable Technology		Call Type	Phone Support	Attachments	Attachments
Order Number*	11001100111																												
Company Name*	ACME Limited																												
Subject*	Installation of new AdaptAbility™ application																												
Priority	High																												
Planned Completion Date	16																												
Account Manager																													
Assign To																													
Product	AdaptAbility																												
Details	Details																												
Applicable Technology																													
Call Type	Phone Support																												
Attachments	Attachments																												
<div> <div>Choose action</div> <div>Choose Action:</div> <div> Close  Save &amp; Close  Add Comment  Add Correspondence  Add Initial Response  Cancel  Log Call  Query  Request Resource </div> </div>																													
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## Editing a Document

Editing or changing a document is simple. Simply retrieve the document you wish from the search results screen or as displayed from a pre-sorted view.

It is important to note that you will only be able to edit or change a document if (a) the fields have been configured to be editable, or (b) if you have been given an editors role.

Some fields may be configured so that once they have been saved they will not be able to be changed by anyone unless they have the appropriate security.

The important thing to note is that you will only be able to change fields or information that you are allowed to. Therefore, if you want to change an existing document and find that you cannot do so, please consult the database administrator to clarify your role in the process.

## Working in Documents

AdaptAbility™ documents have a similar look and feel across all AdaptAbility™ applications. Once you are familiar with working with documents in one AdaptAbility™ application, it is an easy process to learn how to use documents in other AdaptAbility™ applications.

This section of the Training Guide gives an overview of the lay-out of a typical document.

The "**Main Document**" tab is where you will find the pertinent information relating to the application (for example, in this case a Support Call). As well as the main details of the document it includes information on who the document is '**Currently Owned By**', when it was '**Created By**', the documents '**Current Status**', who the document was '**Last Modified By**' as shown Fig 1.

(Fig 1)

Action	New Document	Views	Process Overview	Search	AbilityCenterTM
<h2>Support</h2> <h3>Support Request</h3>					
Current Status : New Call Currently owned by Darren Tong,Gordon Inkson,Peter Molyneux,Ross Mitchell,Support Team					Cre Last mo
<div> <div>Main Document</div> <div>Sub-documents</div> <div>History</div> </div>					
Order Number*	5432				
Company Name*	<div> <div>+</div> <div>-</div> </div> Microsoft New Zealand Limited				
Subject*	Migrating from Exchange to Notes/Domino				
Priority	Medium				
Planned Completion Date	<div> <div>01/04/2004</div> <div>16</div> </div>				
Account Manager	<div> <div>+</div> <div>-</div> </div>				
Assign To	<div> <div>+</div> <div>-</div> </div>				
Product	<div> <div>+</div> <div>-</div> </div> Ability Suite - All				
Details	<div> <div>▼</div> <div>Details</div> </div> <p>Customer has decided to switch from Exchange 5.5 to Domino 6.5 due to issues concerning migration of ownership. The Notes 6.5 client with integrated presence awareness and instant messaging, also AbilitySuite® have reinforced this significant decision as being the best for the business.</p>				
Applicable Technology	<div> <div>+</div> <div>-</div> </div>				
Call Type	Support Call				
Attachments	<div> <div>▶</div> <div>Attachments</div> </div>				

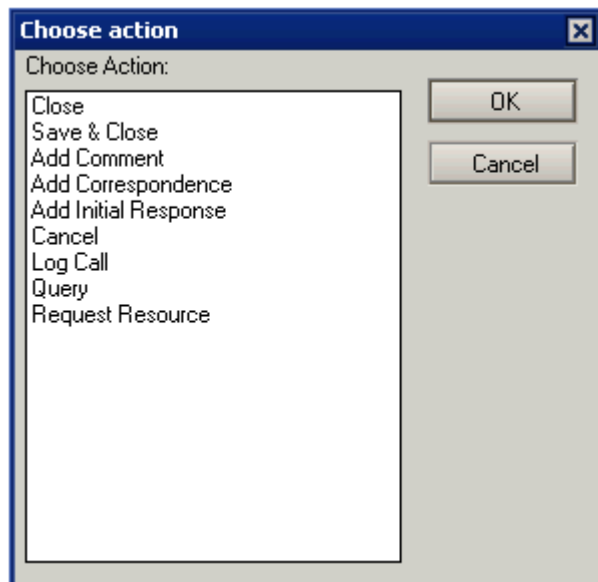
This screen also contains an **Action** button conveniently located on the main tool-bar at the top of the screen (Fig 2).

(Fig 2)

Action	New Document	Views	Process Overview	Search	AbilityCenterTM
--------	--------------	-------	------------------	--------	-----------------

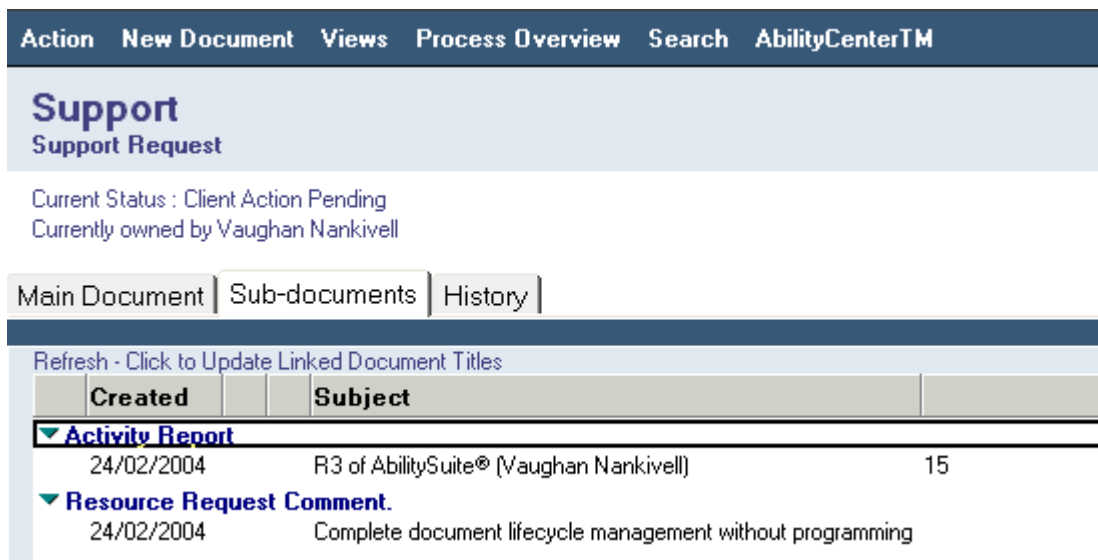
Only actions relevant to the **'State'** of the document you are working with will be available. In this example, an assigned support call has the actions available as shown in Fig 3.

(Fig 3)



The '**Sub-documents**' tab is where you will find any related documents or forms that have been created from a linked action. These documents are not part of the main form but they may have contain information such as comments or correspondence that have been raised as the document goes through its lifecycle. The Sub-documents tab can also include '**Queries**' (and their status) as well as '**Actioner Instructions**' (refer to Fig 4).

(Fig 4)



The '**History**' tab presents a time log of all actions performed against the document throughout its lifecycle. In some types of processes, particularly strict Document Control processes this can be valuable for auditing purposes. See Fig 5.

(Fig 5)

Action	New Document	Views	Process Overview	Search	AbilityCenter™
<h2>Support</h2> <h3>Support Request</h3> <p>Current Status : Client Action Pending Currently owned by Vaughan Nankivell</p>					
<p>Main Document   Sub-documents   History</p>					
<h4>Main Document Actions History</h4> <p>Created by Vaughan Nankivell on 24/02/2004 at 02:10:44 p.m.            Action taken by Vaughan Nankivell on 24/02/2004 at 02:10:44 p.m. (Log Call)            Action taken by Vaughan Nankivell on 24/02/2004 at 02:18:53 p.m. (Request Resource)            Action taken by Vaughan Nankivell on 24/02/2004 at 02:19:45 p.m. (Assign to Actioner)            Action taken by Vaughan Nankivell on 24/02/2004 at 02:20:12 p.m. (Add Activity Report)            Modified by Vaughan Nankivell on 24/02/2004 at 02:21:16 p.m.            Action taken by Vaughan Nankivell on 24/02/2004 at 02:21:34 p.m. (Awaiting Client Action)</p>					
<h4>Sub-documents Creation History</h4> <p>Resource Request Comment. created by Vaughan Nankivell on 24/02/2004 at 02:18:56 p.m.            Activity Report created by Vaughan Nankivell on 24/02/2004 at 02:20:13 p.m.</p>					
<p>AbilitySuite® by Convergence - Release 3.0.0</p>					

## Basic Field Types - Text, Date, Keyword

A 'Text Field' will allow you to free text information into a field. An example of this in a Customer Support database might be an order number which would be different for each new document created. See Fig 1.

(Fig 1)

**New Support Request - Lotus Notes**

File Edit View Create Actions Text Help

Welcome AdaptAbility Help Docum... New Support Request Manuals - Documents\View1 Help Document

Search New Views Process Overview

Support Request

Details Comments & Queries History

Action

Currently owned by Test User2  
Created by Test User2 on 03/10/2002 at 12:33

Current Status = New Call  
Last modified by Test User2 on 03/10/2002 at 12:33

Order Number\* 12345

Company Name

Subject\*

Priority

Planned Completion Date 03/10/2002 16

Account Manager

Assign To

Product

Details

Details

Applicable Technology

Start New Support Reques... Products Ser 13:04

A 'Date Field' can be particularly useful where there are tasks that must be performed within a

certain time-frame. There may be workflow, escalations or reminders associated with a '**Date Field**'. In this example we are selecting a date that a support call needs to be completed by. Reminders of this support call will be sent to the Assignee a few days before this date if it has not already been completed. An escalation will go to the Author and Assignee on the due date if the call still has not been completed.

When you click on a '**Date Field**' a calendar will appear for you to select the appropriate date. See Fig 2.

(Fig 2)

The screenshot shows the 'New Support Request' form in Lotus Notes. The form includes fields for Order Number, Company Name, Subject, Priority, Planned Completion Date, Account Manager, Assign To, Product, Details, and Applicable Technology. The 'Planned Completion Date' field is set to 16/10/2002, and a calendar is displayed for October 2002. The calendar shows the following dates:

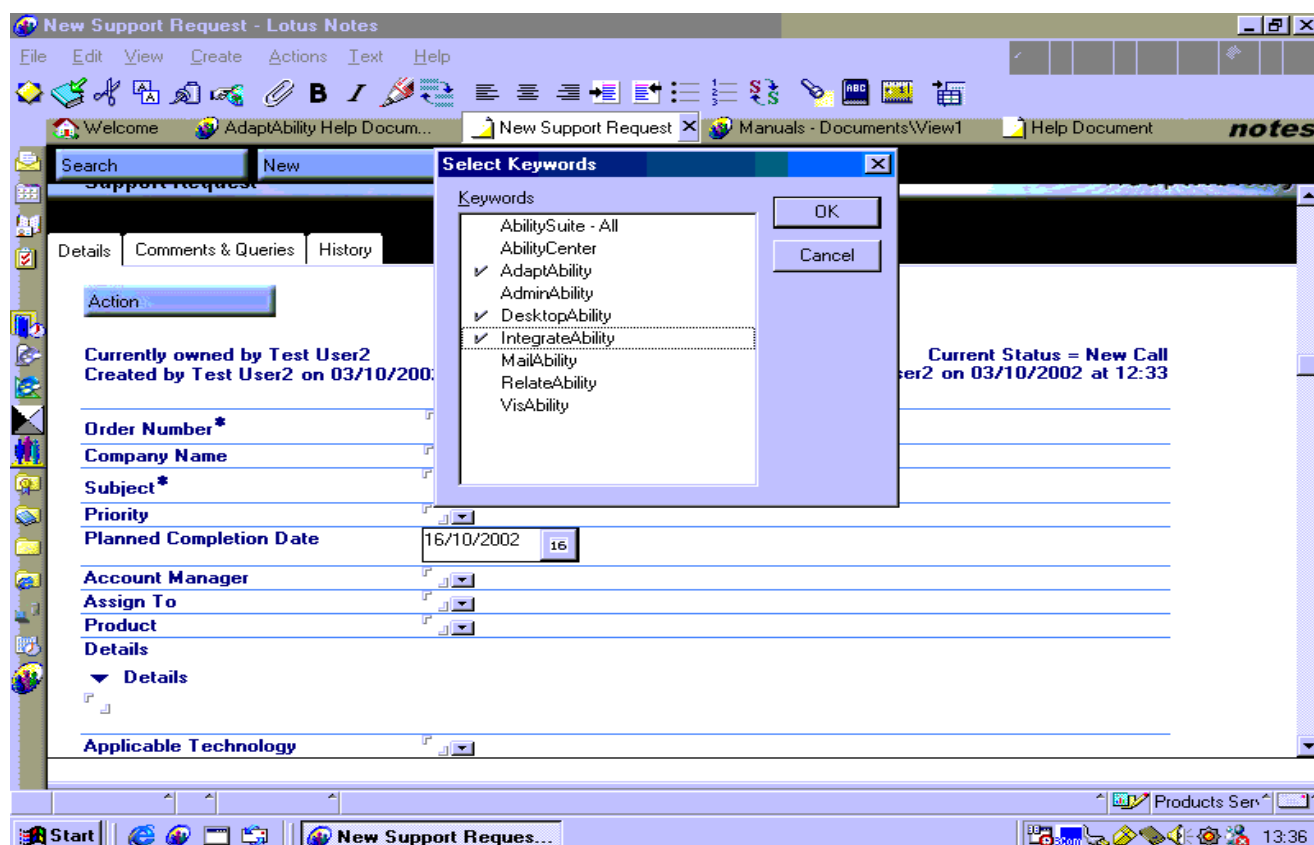
Su	Mo	Tu	We	Th	Fr	Sa
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

The form also displays the following information:

- Currently owned by Test User2
- Created by Test User2 on 03/10/2002 at 12:33
- Last modified by Test User2 on 03/10/2002 at 12:33
- Current Status = New Call

A '**Keyword Field**' allows us to select multiple items from a predefined list. In other words users do not have to type the information. There is a set list that they must select from. This is important in applications where there is an identified list of options that are unlikely to change. For example, if '**Product**' were a '**Text Field**' one user might type in AbilityCenter™ but another user might abbreviate to Ab.Center. By keeping the field as keyword list it ensures the correct term is used making future analysis and retrieval of data easy. See Fig 3.

(Fig 3)



## Special Field Types - Category

A "Category" field is similar to a "Dropdown" field in that users can select from a predefined list of options. The key difference is that multiple options can be selected in a category field (represented by a plus and minus button) versus a single option in a dropdown field (represented by a single down arrow). In the Customer Support database for example, we can select only one call priority (either high, medium or low) as it is a dropdown field, but select multiple technology area's (e.g. Windows, Lotus Notes and Linux) as it is a category field. See Fig 1.

(Fig 1)

Main Document	Sub-documents	History
Order Number*		11001100111
Company Name*	+ -	ACME Limited
Subject*		Installation of new AdaptAbility™ application
Priority		High
Planned Completion Date		16
Account Manager		
Assign To	+ -	
Product	+ -	AdaptAbility
Details		Details
Applicable Technology	+ -	Lotus Notes; Windows - All; Linux
Call Type		Phone Support

## Special Field Types - Rich Text

A **'Rich Text Field'** allows you to put attachments such as picture or graphics files, MS Excel spreadsheet documents and MS Word document into a specific field on a form. This can be useful in a number of different types of processes. In this example, the details field contains supporting documents including an MS Word and Excel document, a PDF document and also a graphics file (see Fig 1).

(Fig 1)

Action	New Document	Views	Process Overview	Search	AbilityCenter™
<h2>Support</h2> <h3>Support Request</h3> <p>Current Status : New Call Currently owned by Vaughan Nankivell</p>					
<div> <div>Main Document</div> <div>Sub-documents</div> <div>History</div> </div>					
Order Number*	11001100111				
Company Name*	<div>+</div> <div>-</div> ACME Limited				
Subject*	Installation of new AdaptAbility™ application				
Priority	High				
Planned Completion Date	<div>16</div>				
Account Manager	<div> <div> <div></div> <div></div> </div> </div>				
Assign To	<div>+</div> <div>-</div>				
Product	<div>+</div> <div>-</div> AdaptAbility				
Details	<div> <div>Details</div> <div> <div>document view.jpg</div> <div>Convergence.doc</div> <div>AdaptAbility Log.xls</div> <div>AdaptAbility.pdf</div> </div> </div>				
Applicable Technology	<div>+</div> <div>-</div> Lotus Notes; Windows - All; Linux				
Call Type	Phone Support				

## Special Field Types - Names (from Address Book or from Managed List)

A **'Names'** field allows a user to select a name from the internal Address Book or from a **'Managed List'** within the AdaptAbility™ application. There may be workflow or readership rights associated with whoever is selected.

In this example of a Support application, we are selecting **'Mini Project'** from a **'Managed List'** to define the call type received (Fig 1).

(Fig 1)

Action	New Document	Views	Process Overview	Search	AbilityCenterTM
--------	--------------	-------	------------------	--------	-----------------

## Support

### Support Request

Current Status : New Call  
Currently owned by Darren Tong,Gordon Inkson,Peter Molyneux,Ross Mitchell,Support Team

Main Document | Sub-documents | History |

Order Number*	1111
Company Name*	IBM New Zealand Limited
Subject*	Presence Awareness
Priority	Medium
Planned Completion Date	16
Account Manager	
Assign To	
Product	
Details	Details
Applicable Technology	
Call Type	Support Call
Attachments	Attachments

#### Select Keywords

Keywords

- Support Call
- Mini-Project
- Phone Support

OK

Cancel

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In this second example we are assigning the support call to '**Bob Smith**' from the Name And Address Book on the server. See Fig 2.

(Fig 2)



**Action** **New Document** **Views** **Process Overview** **Search** **AbilityCenterTM**

## Support Request

Current Status : New Call  
Currently owned by Darren Tong, Gordon Inkson, Peter Molyneux, Ross Mitchell, Support Team

**Main Document** **Sub-documents** **History**

Order Number*	1111
Company Name*	IBM New Zealand Limited
Subject*	Presence Awareness of Lotus® Notes
Priority	Medium
Planned Completion Date	16
Account Manager	
Assign To	
Product	
Details	Details
Applicable Technology	
Call Type	Support Call
Attachments	Attachments

**Select Name**

Choose address book: Convergence's Address Book

Find names starting with: sm

- SampleRequests Group
- Smith, Bob
- Smith, Des
- Smith, Michael
- Smith, Rob
- Stewart, Russell
- Support
- SupportSMSNotification
- Team, Support

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## Performing an Action

When the key data is completed on a form, with particular emphasis on the **'Mandatory Fields'** (marked with an \*), we can assign an action against the form. We may wish to discard changes and simply close the form. Likewise, we may wish to simply save the form and complete it at a later point. If you have completed everything that needs to be there, the form can be advanced to the next stage of the process.

The options available depends on the application and how it has been configured. Only the options that are relevant to the **'State'** of the document will be available for selection.

For example, in the Customer Support application we have been using, we have just created a new support call and therefore the document is in the **'New'** state. By clicking on the **'Actions'** button from the main toolbar, we can see what options are available and select the most appropriate one. In this case we want to **'Assign to Actioner'**. See Fig 1.

(Fig 1)

Action	New Document	Views	Process Overview	Search	AbilityCenter™																						
<h2>Support</h2> <h3>Support Request</h3> <p>Current Status : Resource Request Currently owned by Ross Mitchell</p>																											
<div> <div>Main Document</div> <div>Sub-documents</div> <div>History</div> </div> <table border="1"> <tr> <td>Order Number</td> <td>1234</td> </tr> <tr> <td>Company Name</td> <td>ACME Limited</td> </tr> <tr> <td>Subject</td> <td>Possible Trojan Virus</td> </tr> <tr> <td>Priority</td> <td>High </td> </tr> <tr> <td>Planned Completion Date</td> <td>24/02/2004 </td> </tr> <tr> <td>Account Manager</td> <td></td> </tr> <tr> <td>Assign To</td> <td>  Bob Smith</td> </tr> <tr> <td>Product</td> <td> </td> </tr> <tr> <td>Details</td> <td> Details</td> </tr> <tr> <td>Applicable Technology</td> <td> </td> </tr> <tr> <td>Attachments</td> <td> Attachments</td> </tr> </table>						Order Number	1234	Company Name	ACME Limited	Subject	Possible Trojan Virus	Priority	High	Planned Completion Date	24/02/2004	Account Manager		Assign To	Bob Smith	Product		Details	Details	Applicable Technology		Attachments	Attachments
Order Number	1234																										
Company Name	ACME Limited																										
Subject	Possible Trojan Virus																										
Priority	High																										
Planned Completion Date	24/02/2004																										
Account Manager																											
Assign To	Bob Smith																										
Product																											
Details	Details																										
Applicable Technology																											
Attachments	Attachments																										
<div> <div>Choose action</div> <div> <div>Choose Action:</div> <div> <div>Close</div> <div>Save &amp; Close</div> <div>Assign to Actioner</div> <div>Query</div> </div> <div> <div>OK</div> <div>Cancel</div> </div> </div> </div>																											
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### An example of an AdaptAbility™ Process

AdaptAbility™ is designed as a powerful workflow tool to manage the lifecycle of a document. It leverages your email system to send notifications of task being assigned, authorisation and distribution of documents, and also escalations where needed.

The following is a representation of how tasks can be assigned and completed within an AdaptAbility™ application using our Customer Support application as an example.

Fig 1 Shows a Customer Support Call being assigned.

(Fig 1)

**Action** **New Document** **Views** **Process Overview** **Search** **AbilityCenter™**

## Support

### Support Request

Current Status : Resource Request  
Currently owned by Ross Mitchell

Main Document	Sub-documents	History
Order Number	1234	
Company Name	ACME Limited	
Subject	Possible Trojan Virus	
Priority	High	
Planned Completion Date	24/02/2004	
Account Manager		
Assign To	 Bob Smith	
Product		
Details	<a href="#">Details</a>	
Applicable Technology		
Attachments	<a href="#">Attachments</a>	

**Choose action** X

Choose Action:

- Close
- Save & Close
- Assign to Actioner**
- Query

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Choosing this action assigns the call to the support person listed in the "assign to" field.

The assignee will receive an email in their inbox advising them that they have been assigned the call and link to the document is also provided. See Fig 2.

(Fig 2)

**Vaughan Nankivell/Sales/NZ/Convergence**

25/02/2004 10:57 a.m.

**To**

Darren Tong/Devpt/NZ/Convergence(
 Gordon Inkson/Devpt/NZ/Convergenc
 Peter Molyneux/Devpt/NZ/Convergeni

**cc**

**bcc**

**Subject** The following support call has been ass

Please action accordingly.



Clicking on the link will bring them to the form which is now in the '**Assigned State**'. See Fig 3.

(Fig 3)

Support Support Request	
Current Status : In Progress (Assigned) Currently owned by Vaughan Nankivell	
Main Document	Sub-documents   History
Order Number	1111
Company Name	+ - IBM New Zealand Limited
Subject	WebSphere Portal Server Express
Priority	Medium
Planned Completion Date	<input type="text" value="16"/>
Account Manager	Mark Presnell
Assign To	+ - Vaughan Nankivell/Sales/NZ/Convergence
Product	+ -
Details	<a href="#">Details</a> AbilitySuite® is fully supported on WebSphere Portal Server

The assignee can take a number of actions from here, depending on what options have been made available by the database administrator. For example, they could request that the call be reassigned, add a comment, or close the call until a later date. If that last option is chosen, a reminder will be sent depending on the rules of the workflow when the application was configured. The assignee can also add other documents (such as an activity report). In this example, the assignee has made the call and will record the details by selecting the initial response action. See Fig 4.

(Fig 4)

The screenshot displays the 'Support Request' interface in AbilitySuite. The top navigation bar includes 'Action', 'New Document', 'Views', 'Process Overview', 'Search', and 'AbilityCenter™'. The main header shows 'Support Request' with a sub-header 'Support Request'. Below this, the current status is 'In Progress (Assigned)' and it is 'Currently owned by Vaughan Nankivell'.

The interface has three tabs: 'Main Document', 'Sub-documents', and 'History'. The 'Main Document' tab is active, showing a form with the following fields:

- Order Number: 1111
- Company Name: IBM New Zealand Ltd
- Subject: WebSphere Portal
- Priority: Medium
- Planned Completion Date: 16
- Account Manager: Mark Presnell
- Assign To: Vaughan Nankivell
- Product:
- Details: AbilitySuite® is fully supported on WebSphere Portal Server
- Applicable Technology:

A 'Choose action' dialog box is open, listing the following actions:

- Close
- Save & Close
- Add Activity Report
- Add Comment
- Add Initial Response
- Awaiting Client Action
- Awaiting Partner Action
- Query
- Request Reassignment

The 'Add Initial Response' action is currently selected. The dialog box has 'OK' and 'Cancel' buttons.

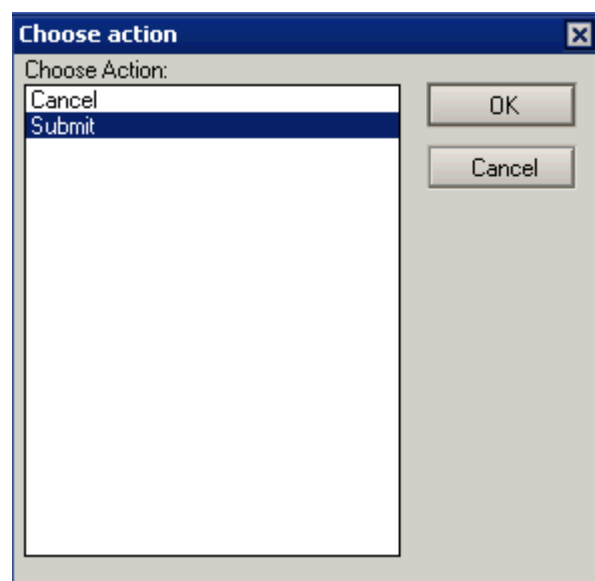
At the bottom of the interface, it says 'AbilitySuite® by Convergence - Release 3.0.0'.

Once work has been performed, the assignee can select the **"Add Activity Report"** action which brings up a sub-document for completion (see Fig 5) and clicks on the **"Submit"** action (see Fig 6).

(Fig 5)

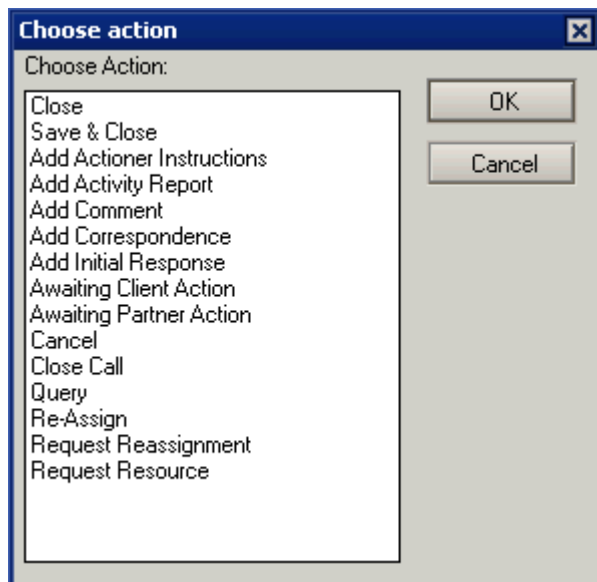
Action	Link to Parent	New Document	Views	Process Overview	Search	AbilityCenterTM						
<h2>Support</h2> <h3>Activity Report</h3> <p>Current Status : New <span style="float: right;">C</span>            Currently owned by Vaughan Nankivell</p>												
<div>Sub-document Details   Activity History</div> <table border="1"> <tr> <td>Subject</td> <td>『 The power of Portal 』</td> </tr> <tr> <td>Number of hours spent</td> <td>『 5 』</td> </tr> <tr> <td></td> <td>           ▼ Comments            Comment History             My Comments            『 Portal Server takes Lotus Workplace one step further creating a richer client experience th applications that leverage peripheral vision. 』         </td> </tr> </table>							Subject	『 The power of Portal 』	Number of hours spent	『 5 』		▼ Comments Comment History  My Comments 『 Portal Server takes Lotus Workplace one step further creating a richer client experience th applications that leverage peripheral vision. 』
Subject	『 The power of Portal 』											
Number of hours spent	『 5 』											
	▼ Comments Comment History  My Comments 『 Portal Server takes Lotus Workplace one step further creating a richer client experience th applications that leverage peripheral vision. 』											
AbilitySuite® by Convergence - Release 3.0.0												

(Fig 6)



If the assignee has completed all work on the call, the "**Close Call**" action (see Fig 7) can be selected which prompts the assignee to complete the final report and close the call as shown in Fig 8.

(Fig 7)



(Fig 8)



If we return to the main document now we can see that the call is now marked as closed. See Fig 10.

(Fig 10)

Action	New Document	Views	Process Overview	Search	AbilityCenterTM																		
<h2>Support</h2> <h3>Support Request</h3>																							
Current Status : Closed Currently owned by Darren Tong,Gordon Inkson,Peter Molyneux,Ross Mitchell,Support Team,Vaughan Nankivell					Last m																		
<div> <div>Main Document</div> <div>Sub-documents</div> <div>History</div> </div>																							
<table border="1"> <tr> <td>Order Number</td> <td>1111</td> </tr> <tr> <td>Company Name</td> <td>IBM New Zealand Limited</td> </tr> <tr> <td>Subject</td> <td>WebSphere Portal Server Express</td> </tr> <tr> <td>Priority</td> <td>Medium</td> </tr> <tr> <td>Planned Completion Date</td> <td>25/02/2004 16</td> </tr> <tr> <td>Account Manager</td> <td>Mark Presnell/EXEC/NZ/Convergence</td> </tr> <tr> <td>Assign To</td> <td> <div>+</div> <div>-</div>           Vaughan Nankivell/Sales/NZ/Convergence         </td> </tr> <tr> <td>Details</td> <td> <div>▼</div> <a href="#">Details</a>            AbilitySuite® is fully supported on WebSphere Portal Server         </td> </tr> <tr> <td>Attachments</td> <td> <div>▶</div> <a href="#">Attachments</a> </td> </tr> </table>						Order Number	1111	Company Name	IBM New Zealand Limited	Subject	WebSphere Portal Server Express	Priority	Medium	Planned Completion Date	25/02/2004 16	Account Manager	Mark Presnell/EXEC/NZ/Convergence	Assign To	<div>+</div> <div>-</div> Vaughan Nankivell/Sales/NZ/Convergence	Details	<div>▼</div> <a href="#">Details</a> AbilitySuite® is fully supported on WebSphere Portal Server	Attachments	<div>▶</div> <a href="#">Attachments</a>
Order Number	1111																						
Company Name	IBM New Zealand Limited																						
Subject	WebSphere Portal Server Express																						
Priority	Medium																						
Planned Completion Date	25/02/2004 16																						
Account Manager	Mark Presnell/EXEC/NZ/Convergence																						
Assign To	<div>+</div> <div>-</div> Vaughan Nankivell/Sales/NZ/Convergence																						
Details	<div>▼</div> <a href="#">Details</a> AbilitySuite® is fully supported on WebSphere Portal Server																						
Attachments	<div>▶</div> <a href="#">Attachments</a>																						
AbilitySuite® by Convergence - Release 3.0.0																							

All relevant associated documents are available from the "**Sub-documents**" tab as shown in Fig 11.

(Fig 11)

Action	New Document	Views	Process Overview	Search	AbilityCenterTM
<h2>Support</h2> <h3>Support Request</h3>					
Current Status : Closed Currently owned by Darren Tong,Gordon Inkson,Peter Molyneux,Ross Mitchell,Support Team,Vaughan Nankivell					Cre Last mo
<div> <div>Main Document</div> <div>Sub-documents</div> <div>History</div> </div>					
Refresh - Click to Update Linked Document Titles					
	Created	Subject			Initiato
▼ <b>Activity Report</b>					
	25/02/2004	Call completed (Vaughan Nankivell)	1		Vaughan
	25/02/2004	The power of Portal (Vaughan Nankivell)	5		Vaughan
▼ <b>Final Report</b>					
	25/02/2004	AbilitySuite® and WebSphere Portal (Vaughan Nankivell)			Vaughan
▼ <b>Initial Response</b>					
	25/02/2004	The application works perfectly (Vaughan Nankivell)			Vaughan
▼ <b>Resource Request Comment.</b>					
	24/02/2004	AbilitySuite® on WebSphere Portal (Vaughan Nankivell)			Vaughan



A complete history of the call is available in the **"History"** tab. See Fig 12.

(Fig 12)

Action	New Document	Views	Process Overview	Search	AbilityCenterTM
<h2>Support</h2> <h3>Support Request</h3>					
Current Status : Closed Currently owned by Darren Tong,Gordon Inkson,Peter Molyneux,Ross Mitchell,Support Team,Vaughan Nankivell					C Last m
<div> <a href="#">Main Document</a>              <a href="#">Sub-documents</a>              <a href="#">History</a> </div>					
<h4>Main Document Actions History</h4> <p>             Created by Vaughan Nankivell on 24/02/2004 at 02:17:38 p.m.              Action taken by Vaughan Nankivell on 24/02/2004 at 02:17:38 p.m. (Request Resource)              Action taken by Vaughan Nankivell on 25/02/2004 at 10:53:06 a.m. (Assign to Actioner)              Action taken by Vaughan Nankivell on 25/02/2004 at 10:53:34 a.m. (Add Comment)              Action taken by Vaughan Nankivell on 25/02/2004 at 11:11:13 a.m. (Add Initial Response)              Action taken by Vaughan Nankivell on 25/02/2004 at 11:11:53 a.m. (Add Activity Report)              Modified by Vaughan Nankivell on 25/02/2004 at 11:12:18 a.m.              Modified by Vaughan Nankivell on 25/02/2004 at 11:16:03 a.m.              Action taken by Vaughan Nankivell on 25/02/2004 at 11:19:13 a.m. (Add Activity Report)              Action taken by Vaughan Nankivell on 25/02/2004 at 11:45:19 a.m. (Close Call)           </p>					
<h4>Sub-documents Creation History</h4> <p>             Resource Request Comment. created by Vaughan Nankivell on 24/02/2004 at 02:17:42 p.m.              Initial Response created by Vaughan Nankivell on 25/02/2004 at 11:11:15 a.m.              Activity Report created by Vaughan Nankivell on 25/02/2004 at 11:11:55 a.m.              Activity Report created by Vaughan Nankivell on 25/02/2004 at 11:19:15 a.m.              Final Report created by Vaughan Nankivell on 25/02/2004 at 11:45:22 a.m.           </p>					
AbilitySuite® by Convergence - Release 3.0.0					