Appendix: Creating Custom Request Forms

Overview

User requests are best when they are very specific. You can help your users create better and more complete requests by creating customized request forms with input fields specific to the kind of work being requested and the organization requesting it.

Assuming that you know the questions that you want to ask the requester, you can create a new request form in very little time.

Implementation

1. In the Request database, create a new subform containing the desired fields for user entry. We suggest you begin by copying the design of the standard request subform named "pgWRStdForm1" and then extending it to include all of the new fields you require.

Save your new subform with a new name.

2. In the Request database, create a new form.

The design of this new form should be as follows.

At the top, insert the subform: pgWRHeader

Next, insert your new subform.

Finally, insert the subform: pgWRFooter

Then close and save the new form with a new name such as "CustomReport1".

Deployment

1. In the Request Administration Profile form, find the table section labeled "Custom Request Setup."

2. In the first field, at the end, enter a title for the new request format.

3. In the second field, at the end, enter the name of the form you have just created.

The checkbox allows you to hide the standard request form.

4. Close and save the Request Profile Document.

Test

Use the "Create Request" action from the Navigator. This will display a list of available request formats that should include your new request type. Select your new type and continue.

Your new request form should appear, ready for use.

Special Programmable Features

Forcing presubmission approval.

You can arrange your request to require one or more approvals prior to submission. These are called "customer side" or presubmission approvals.

To activate this feature you must create a field in your subform which sets the value of the pg_signoffsrequired field that is contained in the pgWRFooter subform.

In your subform:

1. Create a text computed field named "pgwr_setsignofflist"

2. Set the value formula to:

```
ListOfSignoffs:="name":"name2";
FIELD pgwr_signoffsrequired:=pgwr_signoffsrequired;
@If(@IsNewDoc;@SetField("pgwr_signoffsrequired";@Trim(@Unique(L
istOfSignoffs)));"")
```

"name" must be the properly spelled username of some person listed in the access control list of the request database.

"name":"name2" etc. creates a list of names.

When a request is created that executes this statement, the system will record the list of required approvers. The user will then be required to Route the request to each approver for their approval (using the RouteDraft action) before submitting the request for processing.

Adding Additional Validation

Sometimes the requirements for a complete request are difficult to implement as validation formulas on individual fields. For this purpose, the system supports a special field whose name is "pgwr_readynow".

If the value of this field is "Y" then the request can be submitted. If it is not, then the request cannot be submitted.

You can compute the value of this field based upon other fields in your request subform.

Preselecting the Request Manager

By creating a field in your subform called "pgwr_designatedSRM" and filling it with a valid name, you will preset the name of the service request manager for this particular request.

For example, lets suppose you have many requests for desktop installation. You could create a special request subform that specifies "James Patterson" as the request manager by setting the value formula of the "pgwr_designatedSRM" field to "James Patterson".

Then, every request initiated using this form would be routed directly to James Patterson for scheduling rather than to the service request manager designated on the request administration form.