myRequests™

NORTHROP GRUMMAN

myRequests User Guide

NGEO

June 2009

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Getting Started

Logging in

You must create a myRequests user profile the first time you access myRequests.

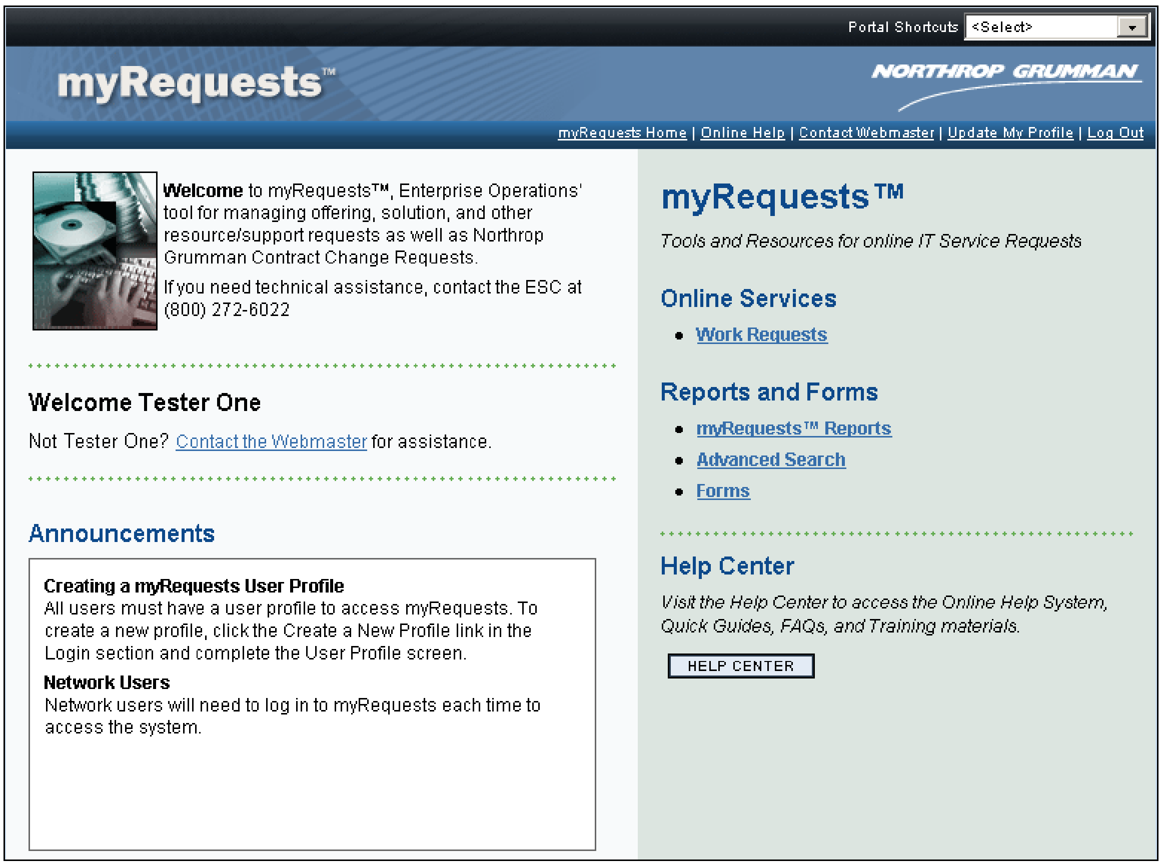
You can change your password by clicking the **Password Reset** link on the Login screen.

To log into myRequests:

- In a web browser, go to https://myrequests.northgrum.com/myRequestsNGEO/

  If the myRequests login and password boxes appear on the home page, type your user ID and password, and then click **Log in**.

The *myRequests Home* page appears.



myRequests Home Page

The myRequests system handles the processing of IT-related service and hardware requests.

After you log in, the *myRequests Home* page appears. This is your entry point to the myRequests system. From here, you can click links that take you to the Online Work Request Tool.

Reports and Forms

In the Reports and Forms area, you can download one or more reports, depending upon the permissions granted to you by the myRequests administrator. To access the reports, click the **myRequests Reports** link.

You can also download several useful forms:

- CMOC Request Form
- Support Request Form
- Business Case Template

To access the forms, click the **Forms** link.

Help Center

The Help Center gives you access to the following resources:

- User Guides
- Quick Guides
- FAQs
- Training materials

Useful links

The *myRequests Home* page also features a number of useful links:

- myRequests Home
- Online help
- Contact webmaster
- Update my profile
- Log out
- Contact the Help Desk

These links are also displayed on many other screens in myRequests.

Portal shortcuts

In the upper right corner of every myRequests screen is the Portal Shortcuts drop-down list:

From this list, you can access:

- Authorization Tool

For administrative users only. Opens the Authorization Maintenance Tool.

- myRequests Home page

This takes you back to the *myRequests Home Page* from anywhere in the application.

Searching for Requests

Advanced Search

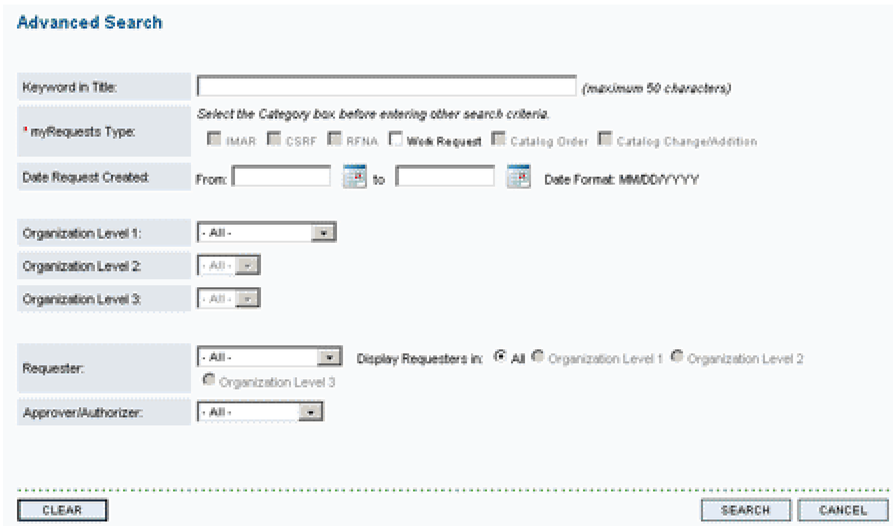
Advanced search enables you to search for requests using multiple search criteria. These criteria include:

- Keywords
- myRequests components
- Date range
- Organization Levels 1, 2, and 3
- Name of requester or authorizer

To conduct an advanced search for a request:

1. On the *myRequests Home* page, click the **Advanced Search** link, located in the top right corner.

   The *Advanced Search* screen appears.



2. Use any or all of the following search criteria:
   - Keyword in Title
   - myRequests Type
     - You must select Work Requests.
   - Date Request Created
   - Organization Level 1
   - Organization Level 2
   - Organization Level 3
   - Requester

     If you selected Organization Level 2 or Level 3, you can restrict the display of requesters to the level you want.
   - Authorizer

3. Click **Search**.

   The *Search Results* screen appears.

4. Do one of the following:

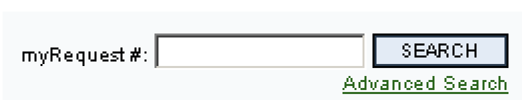
   - To view or print a request, click the request number (in the first column).
   - To launch a new search, click the **New Search** link.
   - To modify the search you just perfomed, click the **Modify Search** link.

To export the search results to an Excel spreadsheet, click the **Export to Excel** button.

To return to the myRequests Home page, click the **myRequests Home** link in the upper right corner of the screen.

Simple search

The simple search mechanism in myRequests enables you to search for an existing request by its request (tracking) number. The mechanism is available after you access Work Requests.



To conduct a simple search:

1. In the myRequest # box in the upper right corner of any screen in the online tools, type the request number.

   You can use a partial number.

2. Click **Search**.

   The search results appear.

3. To view a request record from the list, click its number.

Logging out

To log out:

1. Click the **Log out** link in the upper right corner of the *myRequests Home* page.

   A confirmation message appears.

2. Click the **Close Browser** button.

User Profiles

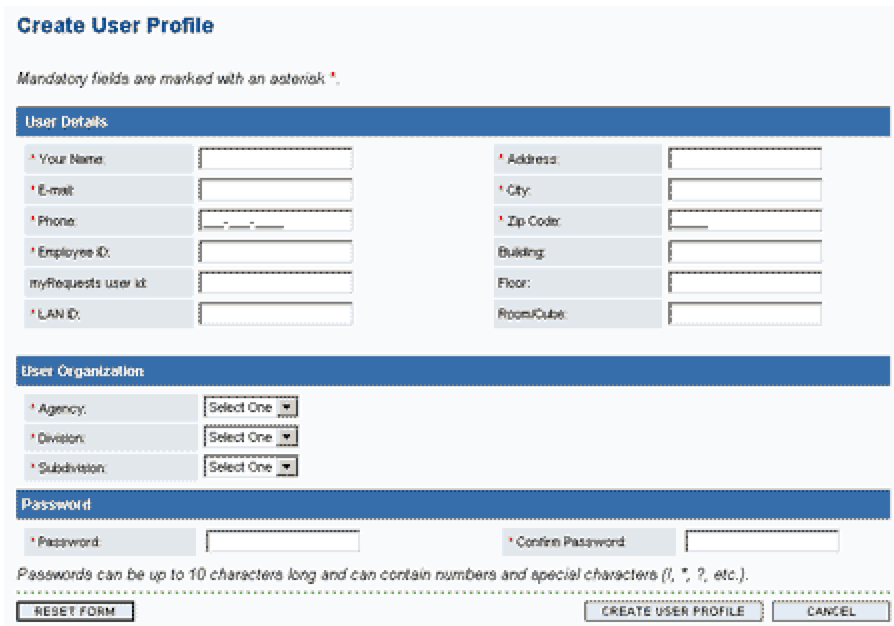
Creating a User Profile

You must create a myRequests user profile the first time you access myRequests.

To create a user profile:

1. On the *myRequests Login* screen, click the **Create a New Profile** link under the Password box.

   The *Create User Profile* screen appears.



2. Complete the information.

   Required fields are marked with a red asterisk. User ID is for non-EO users only.

3. Click **Create User Profile**.

   An e-mail is sent to the new user, summarizing the account that is created.

Updating a User Profile

It is important to keep your user profile current because information from your profile is used to automatically fill in pages in the myRequests online tools. Therefore, incorrect or outdated information on your profile may be transferred to any requests you submit.

To update your user profile:

1. On the *myRequests Home* page, click the **Update My Profile** link, located in the upper right corner of the page.

   The *Update User Profile* screen appears.

2. Make the changes you want.

3. Click **Update User Profile**.

   A confirmation message appears.

4. Click **Go to myRequests Home**.

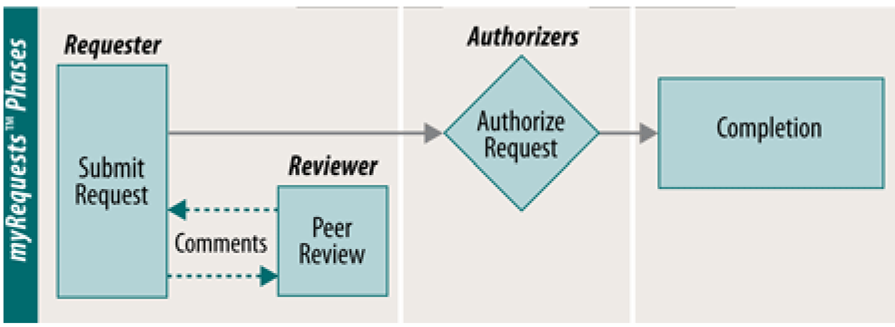
   The *myRequests Home* page appears.

How myRequests Works

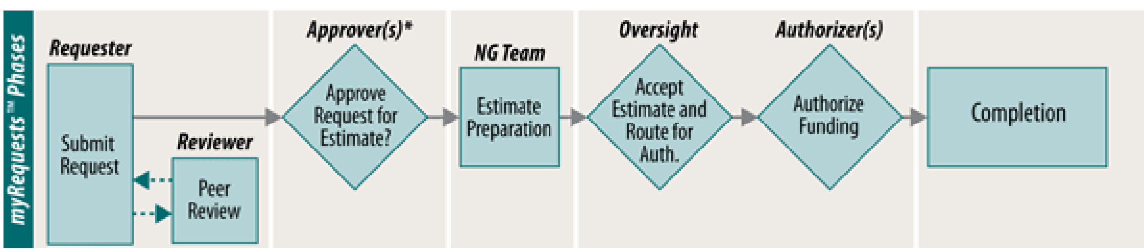
Routing of Requests

In the myRequests system, a request passes through several phases from the time you submit the request to the time it is sent to the Service Desk to begin work. This process is called the "routing" of the request. Different types of requests have different routing paths; that is, they have different phases. For example, some requests need to be authorized by one person only whereas others need multiple authorizations. If there is more than one authorizer, each one is responsible for routing to the next (the requester is not involved at this point).

Here is what the routing looks like for Fast Track and Administrative requests:



Here is what the routing looks like for Quote requests:



myRequests enables you to view and track your requests during the entire process. In addition, the E-mail Notification System automatically sends you a message informing you that the request has progressed to a new phase.

You cannot change the approver or authorizer after the request is submitted, unless you retract the request.

If you have the necessary permissions, you can perform self-authorization for your request.

At the top of the request form is a phase bar that shows you the current phase. For example:

Retracting and Stopping a Request

Both requesters and authorizers have the ability to retract requests; that is, pull the request back from the person to whom they submitted it. You cannot retract a request that is complete or that is being worked on by the NG Team.

Retraction is valid only for one stage in the routing process. This means that:

- The **requester** can retract the request only from the first authorizer; that is, from the person to whom the request was submitted. The retracted request goes back to being a Draft.
- The **authorizer** can retract the request only from the next authorizer. Requests cannot be retracted from more than one authorizer down the line. The retracted request goes back to the retracting authorizer's queue.

Requesters can also **stop** a request at any stage, as long as it has not reached completion. A stopped request can no longer be processed. Authorizers cannot stop a request.

Phases for Work Requests

Below are all the possible phases that a work request can pass through. Keep in mind that not all work requests have all of these phases.

- Draft

  You (the "requester") create and submit the request to the myRequests system, using the Online Work Request Tool.

- Review

  Sometimes a request should be seen and reviewed by your peers before it can progress to the next phase. Reviewing is not mandatory. It is considered part of the Draft phase because the requester can still edit or delete the request. After a request is sent for approval or authorization, it can no longer be sent for review.

- Approval for estimate

  This means that the request is in the process of being approved to receive an estimate from the NG Team for an EUC/DCO quote or a CMOC quote.

- Estimate preparation

  The estimate is being prepared by the NG Team.

- Authorization

  This is the final "green light" for the request. Some requests need to be authorized by one person only; others need multiple authorizations.

- Complete

At each phase, the person who received the request is usually the one who routes it to the next person who must see it. For example, when Quote request passes through approval, the approver routes it to the NG Team.

Sometimes, routing options may not appear. This is because there is only one possible recipient for the current phase of the request, or authorization will be complete after the current action is taken.

Roles

Everyone in the myRequests system is assigned one or more "roles." These roles correspond roughly to the phases in the routing of the request.

- Requester

  The person who creates and submits the request. There can only be one requester. The requester is the only person who can make a change within the request.

- Points of contact

  Individuals who are informed that the request has been submitted. No action is required of them. If you list a point of contact, that person will receive notification e-mails throughout the process. Use points of contact only if they are different than the requester.

- Reviewer

  Some requests should be seen and reviewed by reviewers (peers of the requester) before the request can progress to the next phase. Reviewing is not mandatory. Requests sent to reviewers remain in the draft phase and are not locked from resubmittal if the reviewer doesn't respond.

- Authorizer

  This person authorizes the request, allowing it to pass to the Service Desk for implementation. Authorization is the final "green light" for the request. In most cases, there is more than one authorizer.

- End user

  The individual who receives the services requested.

If you have been designated as a reviewer, approver, or authorizer, see Reviewing and Authorizing to find out how to carry out these functions.

E-mail Notification System

The myRequests E-mail Notification system informs you of the progress of your requests, and lets you know when action is required. An e-mail is sent automatically whenever a request progresses to the next phase.

Because myRequests uses the e-mail address in your user profile, it is important to keep the profile up-to-date.

Notification e-mails show you the request number, the status of the request, instructions on any required action, and a link that takes you directly to the request record in myRequests. Here's an example of a notification e-mail.

Online Work Request Tool

Work Requests: Overview

Work Requests are processed using the Online Work Request Tool.

There are several types of work requests:

- Quote

  These requests are used for CMOC, EUC or DCO CCRs that require pricing.

  All Quote requests require the preparation of an estimate by the NG Team before the request can be authorized for funding.

- Fast Track CCR/Other Support

  These requests are used for Fast Track Contract Change Requests (CCRs).

- Administrative

  These requests are used for CCRs that amend a current order but do not affect or change the value of the original CR (i.e., the change is administrative only, not a change to rates, dollars or funding). Other support requests include offering, solution, program, pre-sales or project management support.They are also used to request technical resources (such as technical architects or SMEs) from Enterprise Operations

Reviewing

If you are a reviewer, you can access work requests that have been routed to you. These requests appear on the *Review Work Requests* screen. After accessing one of these requests, you can make comments that are sent back to the requester.

The E-mail Notification system sends you an e-mail when a request has been routed to you. The e-mail contains a link that takes you directly to the request.

To review a request:

1. On any screen in the Online Work Request tool, click the **Reviewer** link near the top of the screen.

   The *Review Work Requests* screen appears.

2. Click the number (in the first column) of the request you want, to view the request record.

Request #
NG-WR-005003
NG-WR-004988
NG-WR-004987

   You can sort the list by any attribute that is underlined. For example, to sort the list by date, click the **Date** column header.

3. In the Review Comments block near the bottom of the page, add a comment.

4. Click one of the following:

   - Submit review comments
   - Close window

     You quit the record. All the comments you made are abandoned.

Approving and Authorizing

If you are an approver or authorizer, you can access work requests that have been routed to you. These requests appear on the *Approve/Authorize Work Requests* screen. After accessing one of these requests, you can—depending on your role—approve or authorize it, or send it back to the requester for changes.

The E-mail Notification system sends you an e-mail when a request has been routed to you. The e-mail contains a link that takes you directly to the request.

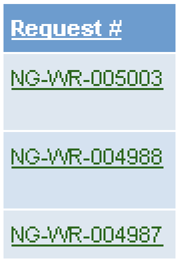
To approve or authorize:

1. On any screen in the Online Work Request tool, click the **Approver/Authorizer** link near the top of the screen.

   The *Approve/Authorize Work Requests* screen appears.

   Click the **History** link to see work requests that have already been processed.

2. Click the number (in the first column) of the request you want, to view the request record.



The request record appears on the *View Work Request* screen.

You can sort the list by any attribute that is underlined. For example, to sort the list by date, click the **Date** column header.

3. In the Authorization Comments block near the bottom of the page, add a comment.

   If you are stopping the request or returning it for revision, a comment is required.

4. If there are additional approvers or authorizers for this request, select one in the Work Request Routing block.

   If you are the final approver or authorizer, the lists will be greyed out.

5. Click one of the following (not all options may be available):

   - Authorize work request
   - Return work request for revision

     The request is sent back to the original requester. You are required to enter a comment.

   - Close window

     You quit the record. All the changes you made are abandoned.

Creating a Work Request

To create a work request:

1. On the *myRequests Home* page, click **Online Work Request Tool**.

   The *Online Work Request Tool* screen appears.

2. Click the **Create Work Request** link near the top of the screen.

   The *Create New Work Request* screen appears.

3. Select the type of work request you want:

   - Quote

- Fast Track CCR/Other Support
- Administrative

A form appears for the type of work request you selected.

4. Begin creating the work request.

Tracking Information

At the top of every request form is the Tracking Information block. Tracking Information contains some or all of the following information:

- Modify

  If the record you are viewing is for an existing request, you are informed whether or not you can modify it.

- Tracking #

  Also called request number or order number. The first set of letters stand for the customer. The second set is for the component.

  This number is important. You may need it when checking the status of the request, and to search for the request in the myRequests system.

- Date created

  The date on which the request is first created, even if it is only saved and not submitted. This date stays the same throughout the life of the request.

- Authorization step

  If the request has already been submitted, you will see information for each authorization step.

If the record you are viewing is for an existing request, you will also see some or all of the following option buttons:

- Edit details

  For work requests only. Click to edit the record for this request and resubmit it.

  If authorization steps have already taken place for this work request, you will see a table that summarizes them.

- Delete draft

  Click to delete the entire record. This option appears only when the request is in the Draft phase.

- Clone

Click to clone (copy) this record. On the *Confirmation* screen that appears, you can continue to the cloned record or return to the original one. A cloned record does not receive the original request's attachments, comments, creation date, required completion date, or routing names. The cloned record always begins in the Draft phase.

Contact Information

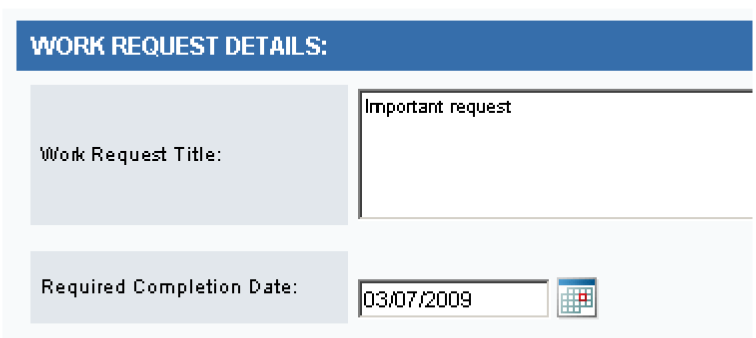
The Requester section is automatically filled in by the system, from the data you provide in your user profile.

Using a "Point of contact" is optional. The contact person does not take any action. As a requester, you will automatically receive e-mail notices during the process and you do not need to add your name as POC. Use points of contact only if they are different than the requester.

You can specify up to two contacts, a primary and a secondary. You can use only one e-mail address for each.

Title and Completion Date

Under contact information, you fill in the title and completion date (or date range) of the request. Here is an example:



The title of a request is a name given to it by the requester. Use a meaningful title so that it will be easier for you to retrieve the request later on.

The "Date Needed" is the date by which the work must be finished.

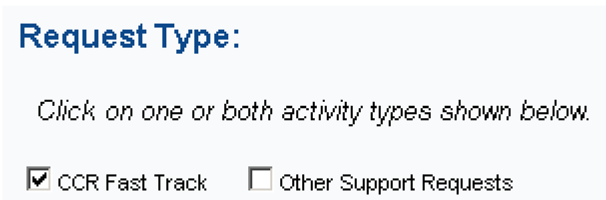
For Administrative work requests, enter the start and end dates of the request's required period of performance.

To enter or modify the date, do either of the following

- Type the date using the mm/dd/yyyy format.
- Click the **Calendar** icon, and then on the calendar that appears, click the date you want.

Request Type

This section is used to classify requests as either CCR Fast Track or Other Support requests. The Request Type check boxes appear when you choose Fast Track CCR/Other Support on the *Create New Work Request* screen.



To select a Request Type:

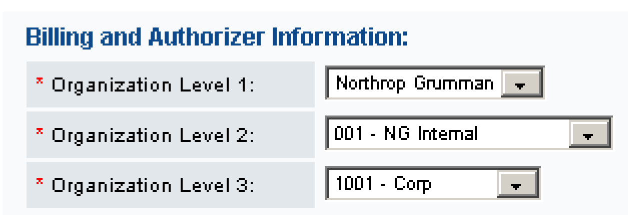
- Select either or both of the two check boxes:
    - CCR Fast Track
    - Other Support Requests

Billing and Authorizer Information

myRequests uses the information in this section to "file" the request under the correct branches of EO. Some fields may be prefilled with information from your user profile.

The options you see and what you can change depend on your organization's policies.

Here is an example:



- Organization Level 1

  One of the major departments of EO.

- Organization Level 2

  An office within the Organization Level 1 you selected.

- Organization Level 3

  Billing units within the Organization Level 2.

Service Request Type

This section contains a drop-down list with all the Service Request Types in EO.

To select a Service Request Type:

- In the Select Request Type drop-down list, select the one needed for your request.

If you don't find the Type you want, select **Other**, and then add a description in the Other Description box that appears.

Attachments

In many cases, you may need to attach a document to the work request. You can include as many attachments as you want.

File names of attachments cannot contain any of the following characters: / \ : * ? " < >

| # <TAB> { } % ~ &

The maximum total size of an attachment is 10 MB.

In the list of attachments, you can delete or download existing attachments.

The NG Team estimate may also be displayed (only for Quote requests).

To include an attachment with your work request:

1. Indicate the type of attachment you are submitting, by either:
   - selecting **EUC, DCO Quote** or **CMOC Quote**

     OR

   - selecting the **Other** box and then typing in the box a description (type) for the attachment.
2. Click **Browse** to locate the document.
3. Click **Upload File**.

   The system uploads the file to the request. A new entry appears in the list of attachments, or a new list is started.

Description

In the Description box, type a description for the request. You can use up to 2500 characters.

Try to be as detailed as possible. This will help expedite your request.

Estimate Type

If your work request is for a Quote, it must be approved for estimate. Here is what the process looks like:

Stage 1

To launch this process, you select **EUC/DCO Quote** in the Estimate Type section of the work request record, and then select the first approver for estimate.

The approvers judge whether there is a solid basis for asking the NG Team to prepare an estimate for the proposed Quote request. If the decision of all approvers is yes, the system passes the request to the NG Team, who immediately prepare an Estimate document that summarizes the basic data for the estimate. They send the document to you and to the Oversight organization.

You and the Oversight organization can call the NG Team to make any changes in the Estimate document details.

If you do nothing, the process continues: The NG Team sends to the Oversight organization a complete estimate for the cost of doing a EUC/DCO Quote for the proposed Quote request. The Oversight organization has the right to ask NG Team for revisions. If the Oversight organization allows the request to continue, you are notified, and then you can either return it to the NG Team with comments, or route the work request to the first authorizer.

If the work request is authorized for funding, the NG Team is notified, and they prepare and deliver to you the complete EUC/DCO Quote. Make sure you download and save it on your computer.

Stage 2

When you are ready to proceed to the CMOC Quote, you create a new work request.

To create the CMOC Quote request

1. Clone the first work request (the one you originally submitted for the EUC/DCO Quote).

   Notice that most of the information is prefilled.

2. Specify a completion date.
3. Attach the full EUC/DCO Quote document.
4. In the Estimate Type section, select the **CMOC Quote** check box.
5. Route the request to the first approver.

The same process as for EUC/DCO Quote is repeated.

After authorization, NG Team produces the Quote.

Routing

This topic explains how to set the routing for your request.

The first step in any routing is to select one of the following options:

- Reviewer

  Some requests must be seen by a reviewer.

- Approver

  This means that the request must be approved to receive an estimate from NG Team.

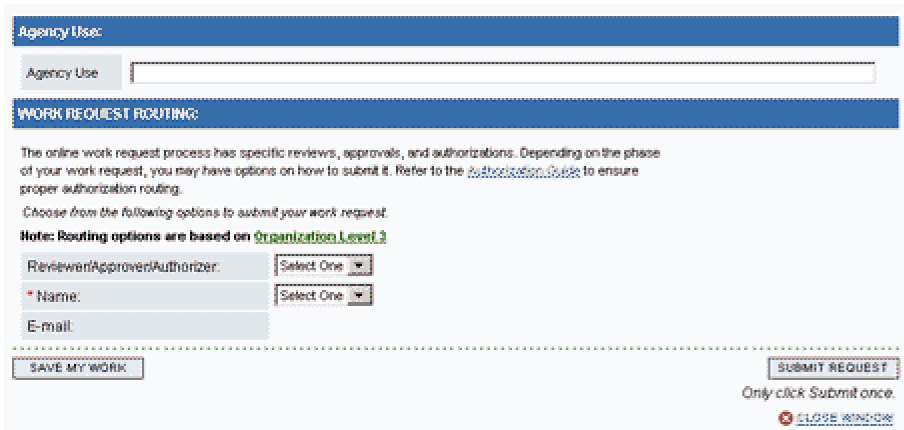
  Estimates are used only for Quote work requests.

- Authorizer

  This is the final "green light" for the request. There may be more than one authorizer, but you only need to select the first one.

To set the routing:

1. In the Reviewer/Approver/Authorizer drop-down list, select the appropriate routing option.



2. In the Name drop-down list, select the person who reviews, approves, or authorizes the request.

If you have the necessary permissions, you can select yourself (self-approval/authorization).

When a reviewer returns a request, you must access the request and choose the approver or authorizer. You can access it directly from the notification e-mail. After you access the request, select the **Edit** option, set the approver/authorizer, and resubmit the request.

Submitting/Saving a Request

After you complete all the information for the request, you have some or all of the following options at the bottom of the screen:

- Submit request

  The request is entered into the system. It will be routed to the reviewer, approver, or authorizer you selected. You cannot modify a request after it is submitted. Do not click the Submit button more than once.

- Save my work

  The request is saved in the system, but not submitted. You can access it by going to View/Modify Requests.

- Close window

  If this is a new request, it is canceled and the data is deleted. If this is the record of an existing request, the request is kept in the system but the changes you just made are abandoned.

In addition, some or all of the following options may appear when you are modifying an existing request:

- Delete draft

  Click to delete the entire record. This option appears only when the request is in the Draft phase.

- Clone

  Click to clone (copy) this record. On the *Confirmation* screen that appears, you can continue to the cloned record or return to the original one. A cloned record does not receive the original request's attachments, comments, creation date, required completion date, or routing names. The cloned record begins in the Draft phase.