Quest® Stat® 7.0.2

Web User Guide

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Legend

CAUTION: A CAUTION icon indicates potential damage to hardware or loss of data if instructions are not followed.

IMPORTANT NOTE, **NOTE**, **TIP**, **MOBILE**, or **VIDEO:** An information icon indicates supporting information.

Stat Web User Guide
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Stat Web

The Stat® Web client provides online access to the CSR Console main window. The left side of the window features controls that let you search for CSRs, create new CSRs, and set up queries that display the types of information you want. When you first login, the main portion of the window displays two default queries, My CSRs, which lists all the CSRs assigned to you, and My Late CSRs, which shows all your CSRs that are currently past due.

Topics:

Opening Stat Web

User access to Stat® is controlled by standard logon security and user class rights. To connect to Stat Web, you must have the user class right to access the Stat Web client (which by default is granted to all user classes but can be removed by system administrators). After you enter both a valid user ID and password, Stat authenticates your logon information and grants you access.

NOTE: Access to the Stat Windows client is similarly controlled by logon security and a separate user class right.

Each user defined within Stat is assigned a unique user ID and password. The user ID, which is between 1 and 10 characters, identifies you in the system. The password must be between 6 and 10 characters in length. Your system administrator creates all user IDs and passwords, although you can change your password after you have logged in.

To open Stat Web:

1. Open your internet browser and go to the URL address for Stat Web, as configured by your system administrator.

   NOTE: The URL address for Stat Web is displayed on the About box of the Stat Windows client. In the Stat Windows client, select **Help | About Stat...**. to open the About box.

2. Enter your user name in the **User Name** field.
3. Enter your password in the **Password** field.

   NOTE: If your password has expired, you are prompted to create a new one. Also, if your password has been reset, you will receive a temporary password by email. After logging in with the temporary password, you can change your password in Stat Web. See Changing your password on page 7 for more information.

4. Click **Log in** or press <Enter>.

CAUTION: Connecting as two different users from the same browser (e.g., in separate windows) will cause the second browser window to cancel the first browser's login session. Similarly, if you use a single browser to connect to two different installations of Stat Web, the second login will cancel the first browser's session.

Exiting Stat Web

To exit Stat® Web, go to the user account drop-down menu in the top right portion of the window and select **Sign Out**. This returns you to the Stat Login window.

Changing your password

You can change your Stat® user password in Stat Web. This also changes your password for the Stat Windows client.

To change your password:

1. In the CSR Console main window, open your user drop-down menu and select **Change Password**.
2. Enter your old password. Then enter a new password that conforms to password requirements as configured by your system administrator.
3. Re-enter your new password to confirm. Then click **Change**.

Resetting your password

You can reset your password from the Stat Web Client without requiring admin intervention. This feature has been particularly created for users who have forgotten their password and need to reset it.

To reset your password:

1. Go to the Stat Web Login screen
2. Click on Forgot Password
3. Enter your username in the Forgot Your Password popup.
4. This should send a link to reset your password in the email address configured against your user in Stat.
5. Go to the mail subjected Reset Your Stat Account Password and click on the reset password link.
6. This should bring you to a Stat Web Client page where you can reset your password.

The About Stat Window

You can open the About Stat window by clicking the question mark link in the upper-right corner. The About Stat window has three tabs: About, Contact, and What's New. The About tab displays the Stat version and copyright information. In the What's New tab, Stat administrators can post custom messages. See the section “Customizing the What’s New Tab in Stat Web” in the *Stat System Administration Guide* for more information.

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Queries

The CSR Console is designed to display three kinds of queries, based on the items they are designed to find in the Stat® Repository: CSRs, tasks, and approvals (as applied to both migrations and status transfers). Query results are displayed in a list format, but because queries can be excessively long or contain information you do not need, you can sort and filter queries and then save the results, either under the same name or as a new query. Also, if you have the proper security right, you can save a query as a global, meaning it will be available to all users when they log into Stat Web. After you create and save a new query, you can then add it to the CSR Console where it will remain as part of your customized display setting.

Topics:

Creating and deleting queries

For each kind of query, the CSR Console provides two pre-defined queries. The first query, the Default Query, displays a complete, non-filtered list of all the CSRs, tasks, or approvals in the Stat® Repository. The second query displays only those CSRs, tasks, or approvals that are assigned to you as the user currently logged in. These queries are named My CSRs, My Tasks, and My Approvals, respectively, and are displayed by default when you first open the CSR Console. You can use any existing query as the template for any new query you want to create.

If you have the right to create global queries, you can also edit and delete them.

To create a query:

1. If it is not currently displayed, go to the **Add Query** menu and add the query that you want to use as the template for the new query to the CSR Console.

   In the **Add Query** submenus, global queries are separated from personal queries which are only available to you as the current user.

2. Click the **Query Settings** button on the query tool bar located in the top right corner of the query.

   This opens the **Query Settings Wizard** for that query.

3. Filter and sort the query as needed.

   For more information, see Filtering queries on page 9 and Sorting queries on page 10.

4. When finished, click **Finish**.

5. In the **Query Name** field, enter a new name for the query.

6. Optionally, select the number of items you want displayed in the query list at a time. The default is 15.

7. Optionally, if you have the security right to create global queries and want to make the query available to all users, select the global check box.

If you do not have the security right, this check box is not displayed and the query will be saved as a personal query.

8 Click **Finish**.

Stat adds the new query to the appropriate **Add Query** submenu and displays it in the CSR Console.

To edit or delete a query:

1 Open the **Query Settings Wizard** for the global query you want to delete.

2 Navigate to the Template tab and click **Save & Finish**, or to delete the query, click the **Delete** button.

Deleting a query removes it from the list of available queries in the CSR Console for all users.

Filtering queries

Query results are displayed in a tabular format. Filtering a query entails specifying which columns you want visible and in what order and then specifying the range of values you want a particular column to display.

To filter a query:

1 Click **Query Settings** on the tool bar located in the top right corner of the query.

This opens the **Query Settings Wizard** for that query.

2 Select the **Columns** tab.

The left side of the window shows all the available columns that can be displayed in the query. The right side shows the columns that are currently visible in the query. From here you can add more columns to the query, remove any you do not want visible, and change the order in which the visible columns are displayed.

3 In the **Available Columns** field, click each column you want displayed in the query. Hold down the <Ctrl> or <Shift> keys to make multiple selections. Then click **Show** to add these columns to the list of visible columns.

4 Optionally, if you want to remove any columns from the query, select them in the list of visible columns and click **Hide**.

5 To change the order in which columns are displayed in the query, select the column you want displayed first and click **Move Up** until it is at the top of the list, and so on for the remaining columns until they are in the order you want.

6 Click the **Filters** tab.

Filtering a column involves specifying the type or range of values you want that column to display. Depending on the column, the values you specify can be either user-defined or selected from a pre-defined list.

The **Available Columns** field shows all the columns that can be displayed in the query. When you select a column, the **Operands** field shows all the functions that can be applied to the range of possible values for that particular column. For example, if in a CSR query you select the **Assigned User** column, the **Operands** field includes only the functions **equals** and **does not equal**, because there are a finite number of users defined in the Stat Repository and a CSR can be assigned to only one user at time. Similarly, if you select the column, **#of Objects**, the list of Operators includes numeric functions, such **equals**, **greater than**, **less than**, and so on. After specifying the numeric function, you need to enter a number in the **Value(s)** field.

Stat Web supports advanced filtering based on AND/OR logic:

- You can apply as many filters to a query as you want. In this case, the multiple filters work in conjunction based on AND logic. For example, you define two filters, one that says the value in the **CSR Type** column must equal **In Development**, and another filter that says the **# of Objects** must be greater than 10. When searching the Stat Repository, the query returns only CSRs that are type **In Development** and are associated with more than 10 objects.

- You can define an extended filter based on OR logic. This is done by selecting multiple values, either by holding down <Ctrl> or <Shift> keys or, in the case of numeric values, by specifying a number, clicking the **+** button next to the **Value(s)** field, and specifying an additional number. For example, you want a CSR query to return only CSRs that are associated with exactly 5 or 10 objects. To do this you would select the column **# of Objects**, the operator **equals,** and in the **Value(s)** field enter then number **5**. Then you would click the **+** button and in the next **Value** field enter the number 10.

7 Select the column you want to filter in the **Available Columns** field.

8 Select the Operator function you want. Then, depending on the column and operator, specify or select a value in the **Value(s)** field. To define an extended filter, select a value, click the **Add Filter** button beside the **Values(s)** field, and then repeat the steps with additional values.

> **NOTE:** For date-specific columns, such as Created On and Due Date, the **Value(s)** field features a Calendar popup which you use to specify a date or range of dates. If you want to specify the current date and time, select the **Now** check box. This adds the environment keyword ${now} which is used as a comparison value against values in the database. For example, if you defined the following filter in a CSR query, [Created Date] between “Sep 15, 2004” and “${now}”, the query would return all CSRs created since September 15, 2004 and when the query is run or refreshed.

9 After defining the filter, click **Add Filter**. The filter equation is displayed in the **Filter** field.

10 Define any additional filters you want to apply to the query. Multiple filters are applied in an “AND/OR” format. If you want to remove a filter, select it in the **Filters** field and click **Remove Filter**.

> **NOTE:** The Assigned User column features the environment keyword value ${UserId}, which specifies the currently logged in user. This value is used by system administrators to define default queries available to all users, such as the My CSRs query.

11 When finished, click **Finish** to save your changes and close the Query Settings Wizard, or click **Sort Order** to specify the sort order for values displayed in particular columns.

Sorting queries

In the **Sort Order** tab, you can specify whether you want values displayed in particular columns displayed in ascending or descending order.

To sort a query:

1 In the **Query Settings Wizard** for the query you want to sort, click the **Sort Order** tab.

2 Select the column(s) you want to sort in the **Available Columns** field. Hold down the <Ctrl> or <Shift> keys to make multiple selections.

3 Click **Add**.

4 For each column you add, specify whether you want the values to be sorted in ascending or descending order.

5 If you are basing the sort order of a query on multiple columns, use the Up and Down arrow buttons to change the order in which the columns will be sorted, so that the first column you want the sort order to be based on appears at the top of the list, and so on.

6 To remove a column from the sort order, select its corresponding check box, and click **Remove**.

7 When finished, click **Finish** to save your work. The CSR Console displays the sorted query.

Exporting queries

You can export the contents of a query in a number of different file formats. This feature can facilitate printing when a query contains an especially large amount of data.

To export a query:

1. Click the **Export** button on the query's toolbar located in the top right corner of the query.

   This opens the **Export Settings** window for that query.

2. Select the file format in which you want to export the query. Options include CVS, Excel, PDF, HTML, and Text.

3. Click **OK**.

Using pages

If you have several queries displayed in the CSR Console, it may be difficult to navigate through all the available information. One way to organize your queries is to display them on separate pages. This way, you could have one page for CSR queries, another page just for task queries, and a third page for approvals, or you can have pages which display queries only for specific users or service domains.

When you first log in, the CSR Console features one default page, My Stat.

To add a page, click the **Add Page** link in the CSR Console. Then in the **Add Page** dialog, enter the name you want for the new page and click the **Add** button. To remove a page, open it and click **Remove Current Page.** You can remove any page in the CSR Console, including the default page, MyStat. The CSR Console must always contain at least one page.

NOTE: Removing a page does not delete the queries that are currently displayed on that page. The queries remain available in their respective submenus where you can add them to a different page as needed.

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CSRs

CSR stands for Change/Service Request, which is basically a problem or issue reported by a customer or another user that is documented and resolved in Stat®. The CSR window is a central location in which to compile all the information related to a request, as well as manage all the steps of investigating and resolving it. CSRs are where most of the user activity in Stat takes place.

Topics:

Finding CSRs

If you need to open a CSR that is not currently listed in one of your CSR queries, Stat® provides two ways to quickly locate CSRs in the Stat Repository.

To find CSRs:

- If you know the CSR ID, enter it in the **Open CSR** dropdown, and press the SPACE bar. When entering the ID, be sure to include the service domain code, for example, ORA-29.
- If you do not know the CSR ID, enter key words in the **Search** field, and click the arrow button. Stat Web searches the Stat Repository for all the CSRs that contain the keywords you specified in any of their text fields and lists the CSRs it finds in the **Search Results** dialog. To conduct a narrower search, enter more keywords using global filter. Keyword searches are case insensitive.

Viewing CSRs

Topics:

Opening a CSR

To open a CSR:

- Click the CSR listed in the CSR Console main window.

  NOTE: If you attempt to open a CSR that you have locked in the Stat® client application, Stat Web opens the CSR in read-only mode and gives you the option to override the lock and open the CSR in full edit mode. CSRs locked by other users open in read-only mode. Position your cursor over the CSR title bar to see what user has the lock and when it was locked.

When you open a CSR in Stat Web, the **CSR Information** tab can be accessed from the icon next to the current logged in username on the top right side of the banner, while more detailed information is displayed in the main body of the window. You can select the type of information you want displayed in the CSR Information window by selecting the Edit options in the **CSR Information** tab. You also can filter the information. You may also use the Export option on the CSR Information tab in order to export and print the whole content of the CSR, including the information in all sections. For more information on how to filter this information, see Filtering CSR information on page 16.

All available sections are displayed on the left hand side of the CSR window. The Details section has 3 tabs. The **Properties** tab shows general information about the CSR, such as type, application, assigned user, etc. The other two tabs are for showing the **Description** and **Resolution** fields. The remaining sections on the left hand side show more function-specific information, such as **Workflow** (if any), **Tasks**, **Attachments**, **Logs**, and change **History**.

The following table provide a brief description of each field in the **Properties** tab of the CSR window.

Table 1. CSR fields

Field	Description
Title (Required)	A brief explanation of the CSR.
Service Domain	The service domain in which the CSR is defined.
Application (Required)	An application defines what product or facet of your enterprise is represented in the CSR. Applications are defined by your system administrator. An example of an application might be PeopleSoft Ver. 8.
Environment (Dependent on Application)	Environments further define an application. However, not all applications need to have environments. Environments are defined by your system administrator. If your application is Financials, your environments might be, or AP, AR, and GL.
Project (Optional)	If a CSR is associated with a Stat project, the project field displays the project ID number. Double-clicking on the ID number opens the Project window for that project. If this field is blank, the CSR does not belong to a project. You can add CSRs to projects from either the CSR window or the Project window.

Table 1. CSR fields

Field	Description
Customer (Required)	The customer is the person who makes a request or reports a issue. Stat-initiated communication (such as emails) regarding this CSR are addressed to this person. The customer is the main contact for the CSR. Customers are defined by system administrators in the Stat Windows® client. However, if the customer you want to associate with the CSR is not currently defined in the Stat Repository, with proper security rights you can add the customer when creating the CSR in Stat Web. ***To add a customer:*** 1 Click **Add**. 2 Specify the required customer properties (first and last name, department, and country) and any optional properties. 3 Click **Add**.
Type (Required)	CSR types divide CSRs into categories to help identify the kind of problem or request the CSR represents. The types are defined by your system administrator. Examples of CSR types might be Fix, Enhancement, and Standard Change.
Workflow (Dependent on CSR Type)	Workflows are sets of rules that regulate the sequence and conditions by which CSRs can change from one status to another. Your system administrator defines workflows based on a combination of service domain and CSR type. When you select a CSR type, this field automatically displays the default workflow defined for that type. You can select a different workflow if more than one has been defined. However, if no workflows have been defined for the selected CSR type, this field is grayed out. When you save a CSR in which a workflow has been assigned (as shown in the **Workflow** field), the function specific **Workflow** field appears.
Status (Required)	Displays the current status of the CSR. CSR statuses are associated with CSR types. The status represents the states or conditions that a CSR of a particular type can go through during its development lifecycle. Your system administrator can define several CSR statuses. However, all CSR statuses are variations of three major types: • **Open** – This indicates that the CSR has not been completed and is still being addressed. You will probably have several variations of open, such as Pending Approval, In Progress, and in Testing. • **Closed** – This indicates that a CSR has been completed. CSRs of a closed status no longer appear on the Support Console list of CSRs. There could be various closed statuses, such as Completed and Cancelled. • **Closed for Statistics** – If a CSR is still open but should not be counted in departmental statistics as such, you can give it a Closed for Statistics status. This special status lets you filter information on reports. For example, if you are waiting on a fix from a vendor, you no longer have control of the issue. You may decide to place the CSR in a holding state.

Table 1. CSR fields

Field	Description
Queue (Required)	A specific group of Stat users with similar skill sets or responsibilities available to work on a particular CSR. A user who is not a member of the assigned queue cannot be assigned to the CSR. Your system administrator defines queues and their members. Queues might include Development, Training Staff, Management, and Support Services.
Assigned To (Required)	The user ID of the owner of the CSR. Throughout Stat, this user is called the assigned user. The list of available users depends on the group selected. The assigned user may change several times through out the life of a CSR.
Open By (Auto)	When a user opens a new CSR, Stat automatically populates this field with the user's name. If this CSR was opened via email the default name is "Account, System." If you have proper security, you can change the value displayed in this field.
Open Date (Auto)	When a new CSR is opened, Stat automatically populates this field with the current date and time.
Priority (Required)	Priorities indicate the urgency of the request as determined by the user (as opposed to the customer, which is documented in the **Customer Priority** field). When your system administrator defines priorities, a turn around time is associated with the priority. The turnaround time determines the due date of the CSR. A priority of Urgent might have a turnaround time of 24 hours, which sets the due date to 24 hours after the open date. However, since some organizations may define turn around time in business days only, 24 hours can mean the following Monday if the CSR was opened on a Friday.
Due (Auto)	When you make a selection in the **Priority** field, Stat automatically populates this field with the appropriate date and time.
Closed Date (Auto)	When a CSR is changed to a status equaling closed, Stat automatically updates this field with the current date and time. Before a CSR is set to a closed status, this field is disabled and displays the default value, "01Jan1900 00:00."
Customer Priority (Optional)	The value displayed in this field indicates what priority the customer believes his or her request should have. Although the value may actually be different than what you decide the priority should be (as indicated in the **Priority** field), this is a way to record the customer's sense of urgency in resolving the issue. Customer priority values are service domain-specific and are defined by your system administrator.
Tracking # (Optional)	If the customer has a tracking number for the issue documented in the CSR or if the request initially came from an external help desk system, you can record it in this free form text field.
Alt. Phone (Optional)	Enter an alternate telephone number for the customer, if necessary. This information is stored with the current CSR only.

Setting the current tab as the default

On the **Details** section of the CSR, any of the three tabs could be set as the default tab. This ensures that the selected tab will be displayed first when user opens the CSR. To set a tab as your default tab, make sure you are on the desired tab and click the **Set Current Tab as Default** link on the upper right side of the CSR window.

Exporting

On the **Details** section of the CSR, the content of the three tabs could be exported at any time by clicking the **Export** link on the upper right side of the CSR window.

Filtering CSR information

By default, Stat® Web shows all the general properties of a CSR in the **CSR Information** tab. However, you can filter the tab so that only the information you want is displayed and in the order you want. The filter settings you specify for the **CSR Information** tab are applied to the other CSRs you are allowed to open.

To filter the CSR Information tab:

1. Click the **Edit** link in the top right corner of the **CSR Information** tab.
2. Select the CSR properties (identified as columns) you want displayed.
   - To hide a property, select the column, and click **Hide**.
   - To display a hidden property, select it in the **Available Columns** field, and click **Show**.
3. To change the order that properties are displayed, select the property, and use the **Move Up** and **Move Down** buttons accordingly.
4. Click **Save**.

Closing CSRs

To close an open CSR:

- Click the **Exit CSR** button in the CSR window.

! CAUTION: **For users running Stat® Web in a web browser, do not use the browser close button (the X button) to exit an open CSR. This closes Stat Web entirely and can result in a lock being placed on the CSR. To release a CSR Lock, click the Close button.**

Creating CSRs

You can create a new CSR in either a blank CSR window, or you can use a CSR template if you created one previously in the current service domain. CSR templates are personalized default settings that save time by populating certain fields in a CSR window with pre-defined values. For more information, see Creating CSR templates on page 18.

To create a CSR:

1. Do one of the following:
   - If you want to create a new CSR in a blank CSR window, in the **Create CSR** drop-down menu select the service domain in which you want to create the CSR.
   - If you want to create a new CSR using a previously created CSR template, in the **Create CSR** drop-down menu select the service domain in which you created the template and check the **Use Template** check box.

   Stat® opens a New CSR window, where you specify values for the CSR. The first tab on the **Details** section is the **Properties** tab.

When creating a CSR, you must enter or select a value in all the required fields (indicated by a red asterisk). Other fields display information that is either optional or populated automatically by Stat. You cannot save a CSR until all the required fields have been populated. For a description of each field in the New CSR window, see CSR fields on page 13.

2 Select or enter a value in all the required fields and any of the optional fields, as necessary.

There are two other tabs in the **Details** section for entering **Description** and **Resolution**:

- Before you can save a CSR, you must supply a textual explanation of the CSR in the **Description** field. Using free form text, you can describe a request in as much detail as you want. For example, suppose you open a CSR in response to a customer's request that a particular PeopleSoft panel be changed so that it properly allow for saves. You might enter the following information in the **Description** field: "User states that the panel only saves from 9 to 12 and then it does not save any longer."
- To change a CSR to a closed-type status, you must enter information in the **Resolution** field. The information entered here should be as complete and accurate as possible, as it will become part of your knowledge-based system. For example, a resolution may list the steps taken to solve a problem. Other users with similar problems may refer to this information to resolve recurring issues.

Because the information contained in the **Description** and **Resolution** fields are critical to the success of a CSR, you can use the advanced editing toolbar to enhance the quality of that information. Advanced editing tools includes text formatting, copying and pasting text from other applications, spell checking, and inserting images and hyperlinks. For more information, see the section, Using advanced editing tools on page 17.

> **NOTE:** Templates for the CSR **Description** and **Resolution** fields created in the Stat Windows client based on Application and CSR type are supported in Stat Web. However, if you change either the Application or CSR type in a CSR, a new template is loaded and Stat Web appends that template to the existing text in the **Description** and **Resolution** fields. It does not replace the text, as is the case in the Stat Windows client.

3 In the **Description** field, enter a textual explanation of the CSR. Use the advanced editing toolbar as needed.

4 (Optional) Click **Attachment** if you want to add an attachment to the CSR before saving it.

After saving the CSR, you may not be able to add an attachment if the CSR is assigned to a different user, or if you do not have the rights to edit CSRs. For more information, see Adding attachments to CSRs on page 18.

5 Click **Save**.

Using advanced editing tools

Because the information contained in the **Description** and **Resolution** fields is so critical to the success of a CSR, you can use advanced editing to enhance the quality of that information. Advanced editing includes text formatting, copying and pasting text from other applications, and inserting hyperlinks and image URLs.

Text Formatting

You can change the appearance of selected text by using the **Formatting** toolbar and the special function tool buttons located above the text field on the **Description** or **Resolution** field.

Using the Formatting tool bar, you can change the font, size, and alignment of selected text. You can also bold, italicize, or underline text.

Copying and Pasting

You can copy and paste text into the **Description** and **Resolution** fields from other applications. However, be aware that pasted text that is large in size or specially formatted (such as tables or text with graphics) may not display properly or may pose memory problems. If you want to add a large amount or specially formatted text to a CSR, consider either inserting a hyperlink or adding an attachment.

Adding attachments to CSRs

Stat® Web supports attaching files to CSRs. This allows users to immediately access important data both inside and outside of the Stat Repository.

> **NOTE:** By default, the maximum size of files you can attach to CSRs is 50MB, but this limit can be changed by system administrators in the System Maintenance table. The default 50MB size of CSR attachments is the recommended maximum. Attachments larger than 50MB can adversely affect performance. If you attempt to attach a file that exceeds the maximum size limit, Stat displays an error message. For more information, see the book, *Stat System Administration*, Chapter 4, “General Maintenance Tables.”

To add an attachment:

1. Select **Attachments** section in the CSR window.
2. Click **Add Attachments** to open the dialog window.
3. Click **Browse**. Then locate the file you want to attach to the CSR and click **Open**.
4. In the **Comments** field, enter a brief description of the attachment.
5. Click **Add Attachment**.

   Stat Web uploads the file, attaches it to the CSR, and displays it in the list of attached files. If you want to delete an attachment, select it and click **Delete**. To download an attachment, select the **Download** button.

Creating CSR templates

You can specify default CSR values by saving a CSR as a template. When you save a CSR as a template, the values displayed in certain fields of that CSR become the default settings for new CSRs created within the same service domain. This can save time if many of the CSRs you create within a service domain have the same values. For example, if you work primarily with the Benefits application while in the HR service domain, you could create a template with Benefits as the default value displayed in the **Application** field of new CSRs.

You can use a CSR template to set default values for the following fields in a CSR window:

- Application
- Environment
- CSR type
- CSR status
- CSR priority
- Workflow
- Queue
- Assigned User

To create a CSR template:

1. Fill out a new CSR that you want to use as the template.
2. Check the **Update CSR Template** check box.
3. Save the CSR.

   If a template already exists for the current service domain, saving a CSR as a template overwrites the existing template.

4

Workflow

Workflows are sets of rules that regulate the sequence and conditions by which CSRs can change from one status to another. Your system administrator defines workflows based on a combination of service domain and CSR type. When creating a CSR, the **Workflow** field automatically displays the default workflow defined for the selected CSR type (if any). You can select a different workflow if more than one has been defined. However, if no workflows have been defined for the selected CSR type, this field is grayed out.

When you create a CSR that is assigned a workflow, the start status of the workflow is automatically the status of that CSR. The statuses to which you can transfer the CSR are determined both by the sequence of the workflow diagram and the completion of any transfer rules that may exist.

Topics:

Changing CSR status

When working on CSR assigned to a workflow, you cannot change the status of the CSR until any workflow rules governing that status transfer have been met.

To change the status of the CSR assigned to a workflow:

1. Click the **Workflow** section in the CSR window.

   The **Workflow** window shows the current status of the CSR and the status(es) to which it can be transferred as specified in the workflow diagram. See Understanding the Workflow section on page 20.

   For each status, the window also shows if the transfer rules defined for that status have been satisfied. A green check mark indicates that all the transfer rules have been met and the CSR can be transferred to that status. If any of the transfer rules defined for a status have not been satisfied, you cannot transfer the CSR to that status.

2. To transfer the status of a CSR, select the radio button next to the status and click **Transfer Status**. You can only transfer a CSR to statuses that display a green check mark, meaning that all their transfer rules are satisfied.

   The **Transfer History** portion of the **Workflow** window shows the sequence of status changes the CSR has already gone through.

Understanding the Workflow section

The Workflow screen consists of three sections:

- Status History section: Displays at the top of the page. Shows recent and current status, and offers status transfer interactivity to advance to the next status.
- Diagram section: Shows a graphical representation of the workflow.
- Detail section: Displays below the workflow diagram. Shows details about an item selected in the diagram.

Status History section

The top portion of Workflow section shows a linear sequence of statuses, starting with past statuses, followed by the current status, followed by options for the next possible status.

Each past status shown is labeled with status name that represents the sequence of occurrence. Up to three past statuses are shown. If more than three past statuses exist, the sequence of statuses starts with an entry "(…)" before the three visible statuses. The current status is displayed next in bold.

A list of available transfers from the current status of the workflow is displayed next. The green check mark in the **Transfer Ready** column indicates if all rules for each status have been satisfied. If current user is able to transfer the status, the radio button next to the status in the **Transfer To** column will be enabled. Note that all rules could be satisfied for a status, but current user may not be in the **Changed-by Users** list. In this case, the radio button next to the status in the **Transfer To** column will not be enabled.

If a red stop icon is displayed in the **Transfer Ready** column, it indicates the presence of a condition blocking the transfer to that status.

Once an active status in the **Transfer To** target status list is selected, and when all possible additional conditions to transfer to the status have been met, the **Transfer** button become enabled, allowing the user to perform the status transfer.

When an active radio button in the **Transfer To** column is clicked, designating a target status, the following can result:

- If nothing else is required for the status transfer to take place, the **Transfer** button becomes active.
- If a status transfer rules is prompting a queue change, a set of interactive prompts appears, asking for a queue and user choice. The queue choice begins as active. Once a queue is chosen, the user choice activates. Once both choices have been made and nothing else is required for the status transfer to take place, the **Transfer** button becomes active.

A change of queue choice resets the user choice.

- If the target status choice implies a transfer override, an interactive prompt for an override explanation appears. Once text has been entered in the field, and nothing else is required for the status transfer to take place, the **Transfer** button becomes active.
- If the target status choice closes the CSR, an interactive prompt for CSR resolution information appears. Once text has been entered in the field, and nothing else is required for the status transfer to take place, the **Transfer** button becomes active.

Diagram section

The next section of the page shows the diagram of the workflow, with statuses as main nodes, arrows connecting the statuses indicating possible status changes, and transfer rule sets as nodes on the connecting arrows.

A status or a transfer rule set can be selected, by clicking it. Clicking in empty space in the diagram de-selects a selection. When an item in the diagram is selected, the detail section of the page, underneath the diagram, shows information about the item. A selected item is shown in a blue square as a selection marker.

The diagram differentiates, in order of precedence, between the current status, possible immediate next statuses (available or blocked), past (previously active) statuses, and future (non-visited) statuses that are not available as immediate transfer targets.

The diagram also indicates Start and End statuses, where the workflow originates / terminates.

The current status is a solid blue, with thick black and white outlines. Its status name is emphasized in bold.

- A possible immediate next status that is available (as opposed to blocked) is filled with a green and white vertical stripe pattern.
- A possible immediate next status that is blocked is filled with a diagonal red and white stripe pattern.
- A past (previously active) status is filled with a horizontal blue and white pattern.
- A future (non-visited) status is indicated with a white fill.
- A workflow start node is marked with an S badge.
- A workflow end node is marked with an E badge.
- A node that has been selected as a transfer target in the **Change To** column in the page is emphasized with a thick blue outline.

User-Advance vs. Auto-Advance Status Transfers

A connecting line between two status nodes shows arrowheads in the direction of possible status transfers: one way or both ways. A user-driven status transfer (requiring the user to interact with the Status History section, clicking the **Transfer Status** button to initiate the transfer) is represented by a solid black arrowhead. An auto-advance status transfer, which executes as soon as originating status is active and no blocking conditions exist, is represented by an outline arrowhead, with a white fill.

Transfer Rule Set Nodes in the Diagram

Transfer rule sets, if present, are shown as icons on the connecting lines between status nodes, near the tip of the connector in direction of the transfer. A transfer rule set that contains no blocked transfer rules is shown as a green check mark icon. A transfer rule set containing blocked transfer rules is shown as a red stop icon. If there are no transfer rules, a white non-filled circle is shown. Transfer rules outside of immediate reachable status transfers are shown with a grey-filled circle.

Other Actions

The Diagram section has its own set of secondary actions:

- Legend: shows a dialog window with a legend explaining the states of the diagram.
- Export: exports the entire workflow in pdf format.

Detail section

When no selection is made in the diagram, the detail section underneath the diagram is empty. With a status node selected in the diagram, the detail section shows details about the corresponding workflow status. With a transfer rule set selected in the diagram, the detail section shows details about the corresponding transfer rule set.

Status Details

For a selected status, the detail section shows a table of status rules for that status. The table will display the **Rule Name** and the **Rule Type** for that status.

Transfer Rule Details

For a selected transfer rule, the detail section shows a title that includes the originating status and the destination status between which the transfer rule resides. If the transfer is an automatic transfer, the title shows the modifier (Auto Transfer).

- If there are transfer approvals associated with the transfer rule, a **Transfer Approval List** button is displayed to access the approval summary.
- If there are migration approvals associated with the transfer rule, a **Migration Approval List** button is displayed to access the approval summary.

A tab set with three tabs is displayed for viewing the details for any possible **Transfer Rules**, the **Transfer History**, and **Changed-by User**. The **Transfer History** tab displays a table of previously occurred transfers for the selected transfer rule. The **Changed-by User** tab displays the list of users that are permitted to perform this transfer.

Workflow Transfer Approval and Migration Approval lists

Workflow transfers and migrations may require approvals. The list of approvers can be accessed from the Detail section of workflow. A **Summary Approval Status** is displayed that shows the current status of approvals. An ellipsis icon means that the approval is pending, a green check mark means that the approvals are done, and a red circle icon mean that approvals were rejected.

A list of Approvers is displayed depending on whether delayed approvals option has been selected or not. User with proper rights may select a row from the list and use the **Approve** or **Reject** button in order to approve or reject a transfer. The **Clear** button clears the approval status for the selected line. The **Email** button sends reminder email to selected approvers. You may also select all users in a Queue or Class by clicking on the Queue/Class name. For delayed approvals, the **Generate** button is used to generate the list of approvers. If delayed approval option is not set, the **Regenerate** button could be used to regenerate the approval list.

The status of approval is displayed for each Queue/Class/User. An ellipsis icon means that the approval is pending, a green check mark means that the approvals are done, and a red circle icon mean that approval was rejected.

The Approvals list has the following columns:

Table 1. Approvals list columns

Column	Description
Operator	Shows a sideways tree graph connecting a root node to each approver item. The graph shows AND and OR nodes to depict the dependencies existing between approver items. Each node in the graph shows a status icon: • Pending: ellipsis • Approved: green check mark • Rejected: red circle with a cross
Approver	Shows the Class/Queue name followed by the list of users or the Individual Approver followed by list of users. Approver line items and sub-line items are shown as active if they are selectable, and as inactive if not.
Approval Status	Shows icons for approval status per sub-line item. • Pending: ellipsis • Approved: green check mark • Rejected: red circle with a cross
Required	Indicates if the entry is required or not.
Overridden By	Lists the name of the overriding approver if an approval has been overridden.
Email Sent	Displays a green check mark for those listed users to which an email remainder has been sent.
Approval Date:	Shows the date the approval was made.

When an approval status is overridden by a user, a dialog pops up to capture the reason for the override, if the system parameter requiring to do so is set.

The **History** button displays the history of approvals for each transfer status.

Viewing transfer rules

To view the transfer rules for a particular status:

1. Click the **View Details** link to open the **Workflow: Transfer Rules** window.

   All the workflow rules that control the status transfer of the CSR display. A green check mark in the **Complete** column indicates that the rule is complete. An alert icon indicates that the rule is incomplete.

2. Click the **Back to Workflow** link to return to the **Workflow** window.

Delaying approval requests

System administrators can configure workflow rules so that requests to approve a status transfer are not generated until all the other rules defined for the status transfer (if any) have been marked as complete. This ensures that a status is ready to be transferred before users are asked to approve it and reduces the number of approval requests open at any one time.

If the delayed approvals option has been selected, the Approval List for a particular status will be empty until all the other transfer rules are completed. Once status is ready to be transferred, a user can generate the approval requests by transferring the status, or with proper security rights, you can override the delayed approvals configuration and generate approval requests by clicking **Generate**. This button is only enabled for users that have been assigned the user class right, Status Transfer Approval Generate.

NOTE: Once the approval list has been generated, the **Generate** button changes to **Regenerate**.

Sending approval request notifications

With proper security rights, you can email a pre-formatted message to individual users or to all the users in the approval list reminding them about pending or rejected approval requests.

To email an individual user,

- click the mail icon for that user in the Approval E-Mail column in the approval list.

To email all users, click the **E-Mail** button.

An email job request is sent to the Stat® Central Agent which processes the request and sends an email either to each user you selected or to each user in the approval list. A green check mark is displayed next to each user you selected indicating that the job request was submitted to the Agent

System administrators can also configure the Stat Central Agent to include links in the reminder message that the recipient can click to approve or reject the status transfer. This sends an email back to the Stat Central Agent, which processes the response email and changes the approval status to **Approve** or **Reject**, depending on which link the approver selected.

NOTE: When an approval status is changed by responding to a reminder message, the **Update Date** field in the Approval List window will be automatically populated and the **Updated By** field will display the value, **Via email**.

For more information, see the book *Stat System Administration*, Chapter 7, Email Configuration.

Updating approval lists

Occasionally one of the classes or queues designated to approve status transfers needs to be updated, either because new users have been added to the class or queue or existing users have been removed. When this is the case, you can update the approved users list based on class or queue by clicking **Regenerate**. This removes obsolete users belonging to a class or queue from the list and adds new ones. It also resets approval statuses to Pending.

NOTE: Clicking the **Regenerate** button only affects users belonging to classes or queues and is enabled only for users that have been assigned the user class right, Status Transfer Approval Refresh.

Approving migrations and transfers

In Stat® Web, you can approve archive set migrations and CSR status transfers.

- If your system administrator has designated you as a migration approver for a particular environment, other users may need your approval before they can migrate archive sets into that environment. Migration approvals are database-specific and can be either required or optional.
- If you have been designated as a status transfer approver in a particular workflow by your system administrator, other users may need your approval before they can perform a status transfer. Status transfer approval lists can include individual users, entire user classes, or a combination of the two. Also, status transfer approvals can be either required or optional.

To approve a migration or transfer:

1. In the CSR Console main window, open an approvals query that displays any migration or status transfers that are awaiting your approval. as indicated by the value Pending in the Status column.

   Your approval can be made either as an individual or as the member of a user class. Also, approvals are either required or optional:

   - If required, Stat cannot perform the migration until you approve it. In the case of a required user class approval, every user within that class must approve the migration.
   - If optional, then you are one out of a number of users who are authorized to approve the migration. Whenever an approval is marked as optional, the Min Approval column displays the minimum number of optional users who must approve the migration before the archive set can be moved into the target environment.
2. Click in the Status column for each migration or status transfer that you want to approve and select **Approve**. If you do not approve the transfer, select **Reject**.
3. Enter a brief explanation for why you approve or reject the migration or status transfer.
4. Click **Update**.

You can test the connections between Stat® Web and all the change management environments, file servers, and email servers defined in the Stat maintenance tables. You can also test the connection between Stat Web drop-down and any version control management system you have configured.

5

Tasks

Tasks detail all of the steps necessary to solve a problem or complete a request. For example, a CSR for the setup of a new employee may include numerous tasks, such as getting a confidentiality agreement signed, creating a user ID, and scheduling computer training. A CSR can contain an unlimited number of tasks that you can assign to many users. Tasks are associated with activity codes that group related tasks.

Stat® groups related tasks into activities, which are commonly-performed, high-level jobs that consist of several tasks. Activities are defined by a system administrator and are identified by activity codes.

Activities categorize your tasks for reporting purposes. An example of an activity might be Documentation, which consists of two tasks: Document Changes - Pre Change and Document Changes - Post Change.

Tasks are listed either in a query or in a CSR. When tasks are assigned to a user, they automatically appear in the Tasks list for that CSR.

Topics in this section:

Viewing task details

- In the CSR window, click the **Tasks** link.

  The **Task Details** window displays the following information:

  Table 1. Task fields

Field	Description
Activity Type	Each task must be associated with an activity code. An activity code is a category of tasks.
Title	A brief description of the task.
Assigned To	The user assigned to the task.
Start Date	The date when the task is scheduled to start.
Due Date	The date when the task is due to be completed.
% Complete	The percentage of the estimated time required to complete the task that has been worked.
Completed Date	The date that the task was completed.
Estimated Hrs	The estimated number of hours required to complete this task.
Actual Hrs	The total number of hours posted to this task thus far.
Comments	A free text field in which users can add comments regarding the task.

Adding tasks automatically

As you create a new CSR or change the information on a CSR, Stat® evaluates your entry and adds new tasks as needed. This type of task is called an auto task. Stat auto task capabilities let you quickly define advance workflows, including what takes place, when, and by whom. For example, as the status of your CSR changes from Approved to Move to Production, Stat can automatically create and assign various tasks to different users, such as **back up database** or **inform users PeopleSoft will be unavailable from 2 to 3**.

Auto tasks are activated by the **Application**, **CSR Type**, and **Status** fields of a CSR. If your CSR contains an application, type, or status that has an associated auto task, Stat automatically adds it to the Task window.

The user assigned to the task is determined by how your system administrator configured the task. It can be the user who opened the CSR, a pre-defined user, the user assigned to the CSR, the user currently logged on, or a user which you must select. Remember that each task in a CSR can be assigned to a different user.

Adding tasks manually

You can manually add tasks to a CSR at any time and assign them to other users in the service domain of the CSR.

To add a task manually to a CSR:

1. In the CSR window, click the **Tasks** link in the **View** tab of the CSR window.
2. In the **Tasks** list, click **New Task** to open the **New Task** window.
3. Click in the **Activity Code** field and select an activity code from the list. Activity codes identify job categories that group related tasks. If the task does not fall into one of the pre-defined categories, select **Other Activity - Specify**.
4. (Optionally) In the **Description** field, enter a brief description of the task. By default, the Description displays the selected activity type.
5. In the **Start Date** field, click the Calendar icon and select the date when the task is to be started. Most likely it will be the current date, but you can specify any date you want.
6. In the **Due Date** field, click the Calendar icon and select the date when the task should be complete. The due date of an auto task is determined by the system administrator. For example, the system administrator can specify that the task is due three days before the due date of the CSR. When you manually add a new task, the due date defaults to the CSR due date. You can also modify the due date if necessary.
7. Click in the **Assigned to** field and select the user you want to assign this task. The list includes all active users for the service domain.
8. In the **Estimated Hrs** field, enter the estimated number of hours it will take to complete the task. A value in this field is necessary for the system to determine the complete percentage.
9. In the **Comments** field, type any comments regarding this task. Some tasks may require a comment when completed. Stat notifies you of this by displaying the word Required next to this field.
10. Stat automatically updates the **%Complete** field if you enter any Time Entries.
11. Click **Create** when you are finished.

Posting time to tasks

Stat® allows you to track the progress of a task by entering the exact time spent on it. Post the time in the **Task Entry** section of the **Tasks** window.

> **NOTE:** Although you cannot post time to tasks opened directly from read-only CSRs, with proper security rights, you can post time to any task opened from a **Task Query** list, including tasks not assigned to you and tasks associated with closed or read-only CSRs.

To post time to a task:

1. Do one of the following to open the **Tasks** window:
   - From a CSR: Click the **Tasks** link in the **View** tab of the CSR window, and select the task.
   - From a Task Query: In a **Task Query** list, select the task.
2. Scroll down to the **Time Entries** section, which displays tasks already saved to the Stat Repository.
3. To add a new Time Entry click **Add Time**.
4. By default, the current date is displayed in the **Date** field.
5. Click in the **User** field and select the user that performed the work.
6. In the **Hours** fields, enter the number of hours spent on the task. You can use decimals to post portions of an hour, for example, 4.35.
7. Optionally, enter a textual description of the work in the **Comments** field.
8. When finished, click **Add** to save the time entry.

   Stat automatically updates the **Actual Hours** field with the total number of hours posted as time entries.

   If you want to delete a time entry, select the row from the list of time entries and click **Delete**.

6

CSR Logs

Viewing CSR log files

The **Log** window displays all the logs that have been added to the CSR, either by the user or automatically by Stat® when it sends or receives an email associated with the CSR, or when the CSR lock is overridden.

With proper security rights, you can modify the text and topic value of your own logs as well as logs written by other users after the logs are saved. However, you cannot delete logs once they are saved, and you cannot modify system-generated logs.

To view logs

- Click **Logs** section.

  Logs created by Stat appear with the SYSTEM user ID and the Topic is Stat Event.
- To view the contents of a log, double-click its corresponding record in the **Logs** window or click the **View** button.
- You may also filter the list of logs by selecting a category in the **Filter Logs** sub-section.

To add a log:

1. Click **New Log**.
2. In the **Topic** field, assigned a topic to the log topic.

   Log topics are defined by system administrators and are used to organize logs.
3. Optionally, select the **Confidential** option.

   Confidential logs are not emailed to customers. These logs can be viewed and printed only by Stat users with proper authority. In the **Logs** window, confidential logs are designated by a yellow warning icon.
4. In the **Details** field, enter the contents of the log.
5. Click **Create**.

7

Change Management

Topics:

Object Management

Stat Web UI provides change management support for objects of various object types of PeopleSoft, General Applications and Oracle Applications. We can manage the development, archive, migration of all these objects.

In Object management User can Add the different types of objects such as - Proprietary objects, File Objects and Schema Objects. To Add the Objects there is an option Add Objects. Upon clicking on the Add Objects it shows the list of options to Add the objects.

NOTE: Features related to object management like object addition, object archiving, and migrations are not available to functional users.

Adding an object

The Object Management Section of the Web client now supports insertion of objects as described below.
User can Add object from multiple options – in PS, the following options are available for object addition

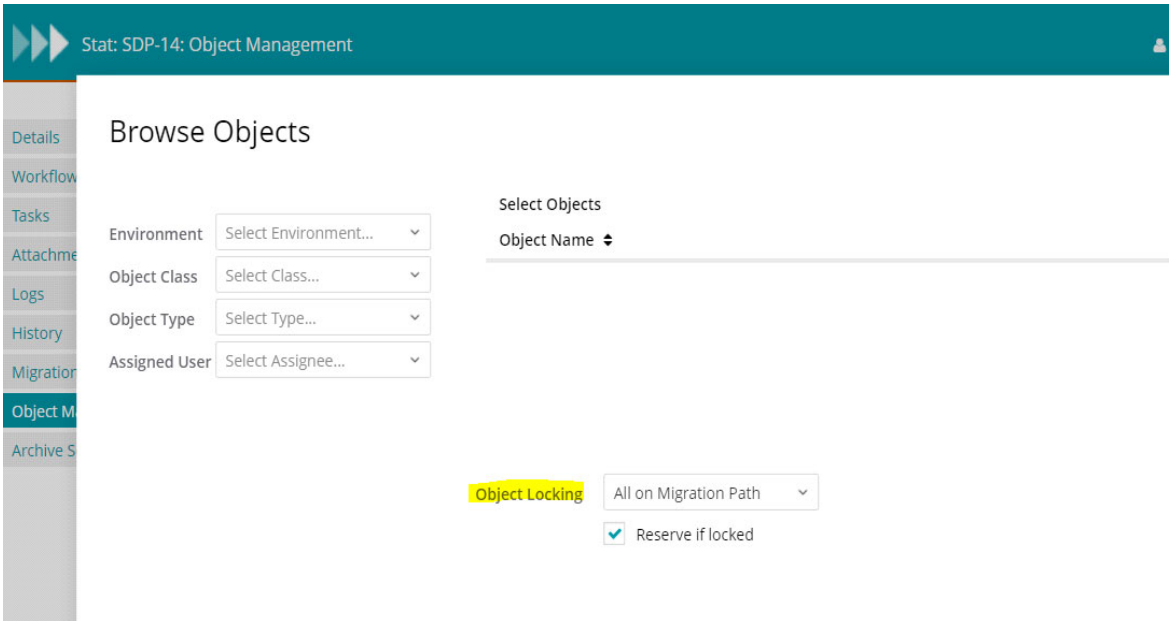
- Browse Objects
- Add from CSR
- Add from VCM
- New Objects
- Add from Files
- Synch Project
- Add from PS project

In E-Business Application the Web Cient shows the following options to add the objects

- Browse Objects
- Add from CSR
- Add from VCM
- New Objects

Browsing Objects

The Browse Objects option opens the popup where a user needs to select the environment, object class, object type and assigned user.

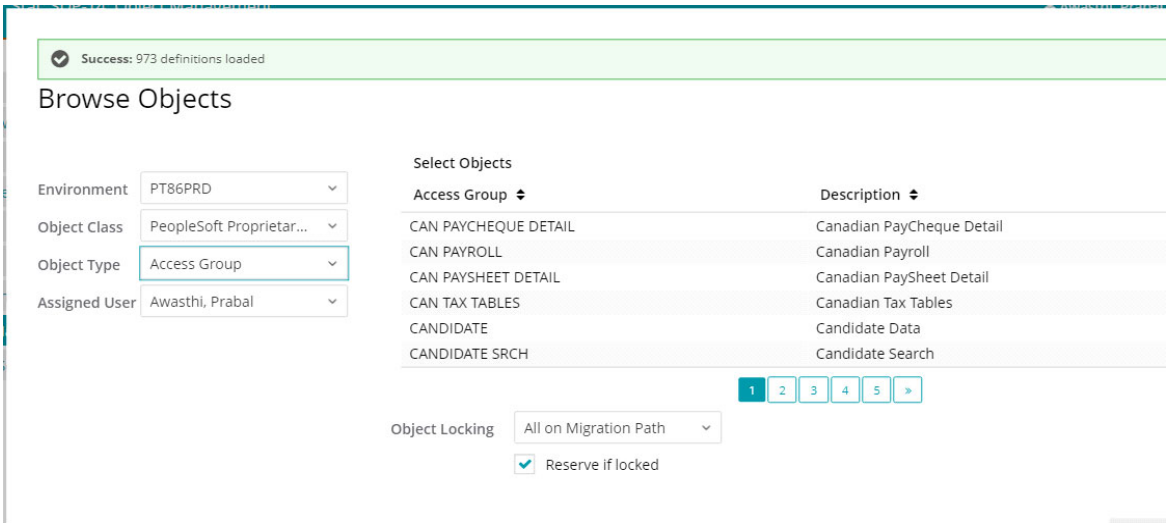


Object Locking

Upon selecting the object(s), it is essential to determine the appropriate locking options to implement. By default, the objects are configured to be locked across all environments along the migration path; however, with the necessary security permissions, you have the ability to choose an alternative locking option. There are four different lock options available:

- **All on Migration Path** – The standard configuration. Choose this option to include and secure the object(s) across all environments. The system will conduct searches in each environment to ascertain whether the object is currently locked or reserved by another CSR.
- **Current Environment** – Choose this option if you wish to include the object from each environment along the migration path while ensuring that the object(s) are locked or reserved solely in the current environment. The system will perform checks for reservations and will lock or reserve the object(s) exclusively in the current environment.
- **None** – This alternative allows for the addition of object(s) to the CSR from each environment along the migration path without imposing a lock on any of them. While it is possible to archive an object that is not locked within an environment, migrating the object to an environment where it is not locked is not permitted. This option should be chosen if the intention is to associate the object(s) with a CSR solely for documentation purposes, without any plans to modify the object(s).
- **Reserve if locked** – This feature automatically initiates a reservation request when the item(s) are secured by another Customer Service Representative (CSR). If this option is left unchecked and the item(s) are locked by another CSR, Stat will prompt you to take action.

After filling the Environment, Object Class, Object Type and Assigned, a user can view the object list under **Select Objects** table.

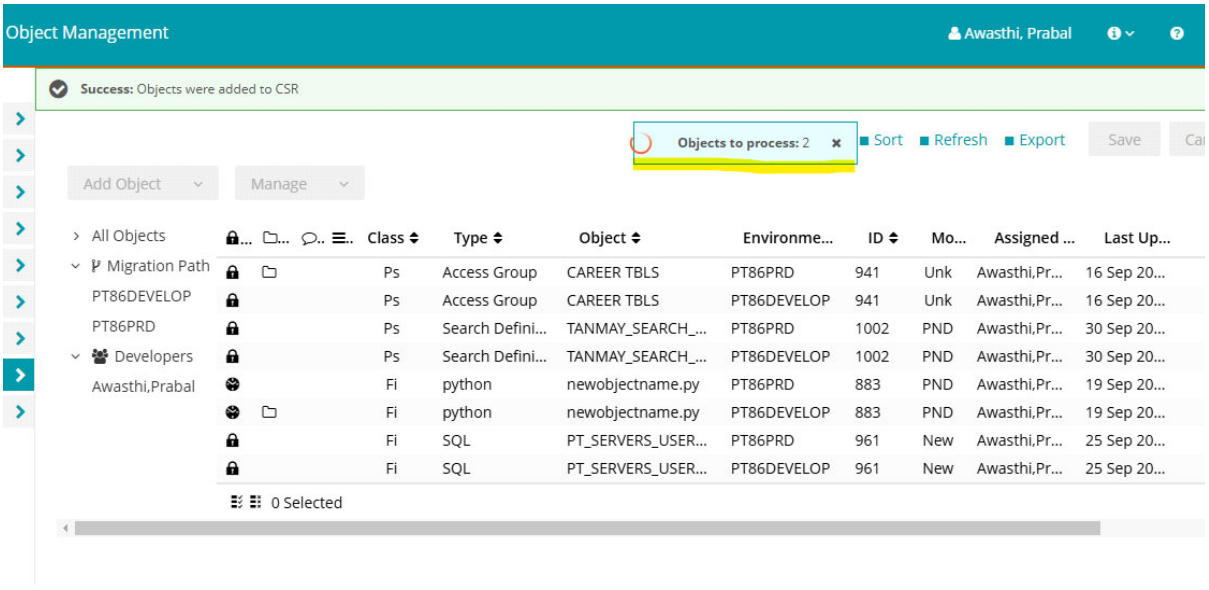


From the Object List, the user can select an object to add in the Object screen, similar to Stat desktop client, as described below:

1 Click on the object row. The selected row will be highlighted in blue.

2 Click Add on the bottom right.

3 The object would be added to your CSR list. You don't need to save the CSR separately for object addition.



Adding from CSR

The *Add from CSR* wizard can be utilized to incorporate objects into your CSR that are linked to a different CSR.

To run Add from CSR Wizard:

1 In the Add Objects button select the option Add from CSR.

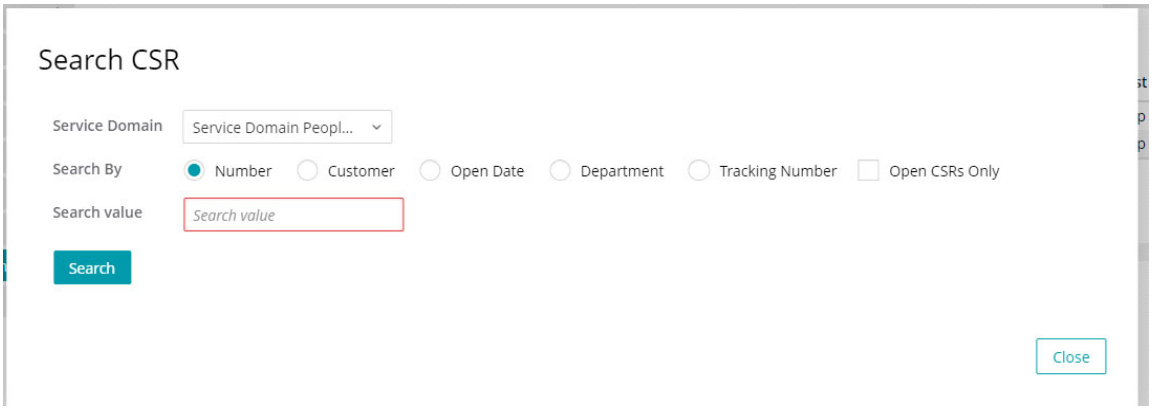
2 Select the Service Domain and Stat initiates the Search CSR Engine, which identifies CSRs within the database according to the chosen search parameters, such as CSR number, customer name, open date, department, and tracking number.

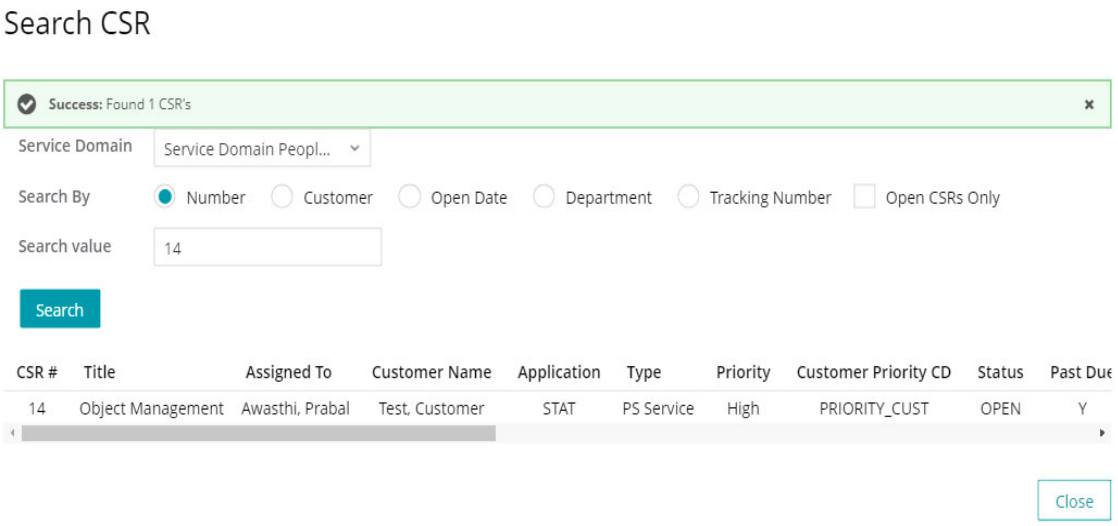
3 Locate the CSR you want in the Search CSR Engine. Then double click on the selected row.

4 Stat closes the Search CSR Engine and opens a dialog box where the user needs to select the Environment, Assigned User and Object type.

5 Click **ADD.**

6 Stat adds the selected objects to your CSR. If the objects are locked on the other CSR for the same environments specified in your CSR's migration path, Stat reserves them on your CSR.





CSR search engine in the Web Client

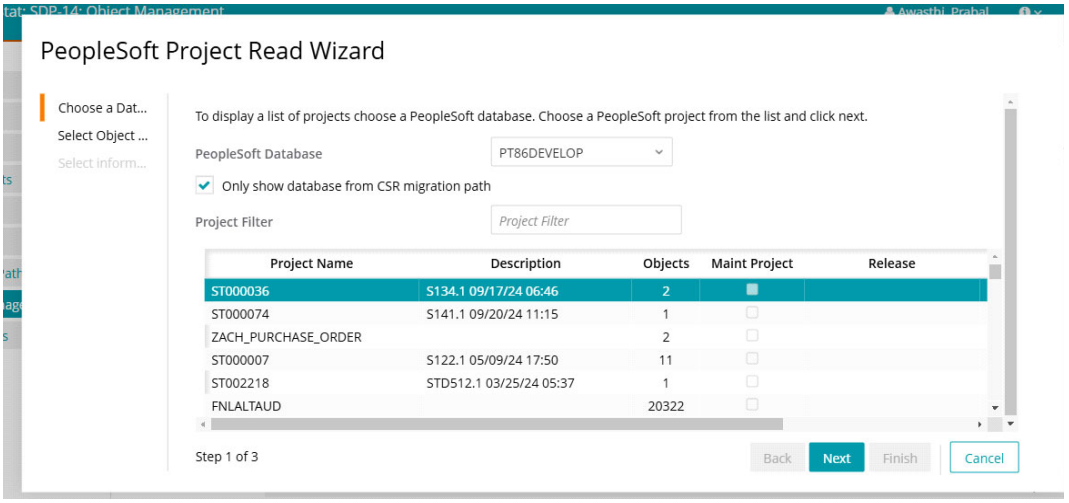
The CSR search engine in the Web Client slightly differs from the one in Windows Client. When we search using a CSR number, the search engine looks for all CSRs in the selected service domain whose CSR numbers have the searched value as a sub text. A similar search method is used when the user tries to search using the *Department* or the *Tracking Number* attribute.

Similarly, when you search using the *customer* attribute, the search engine looks for all customers whose first or last name have the searched value as a sub text.

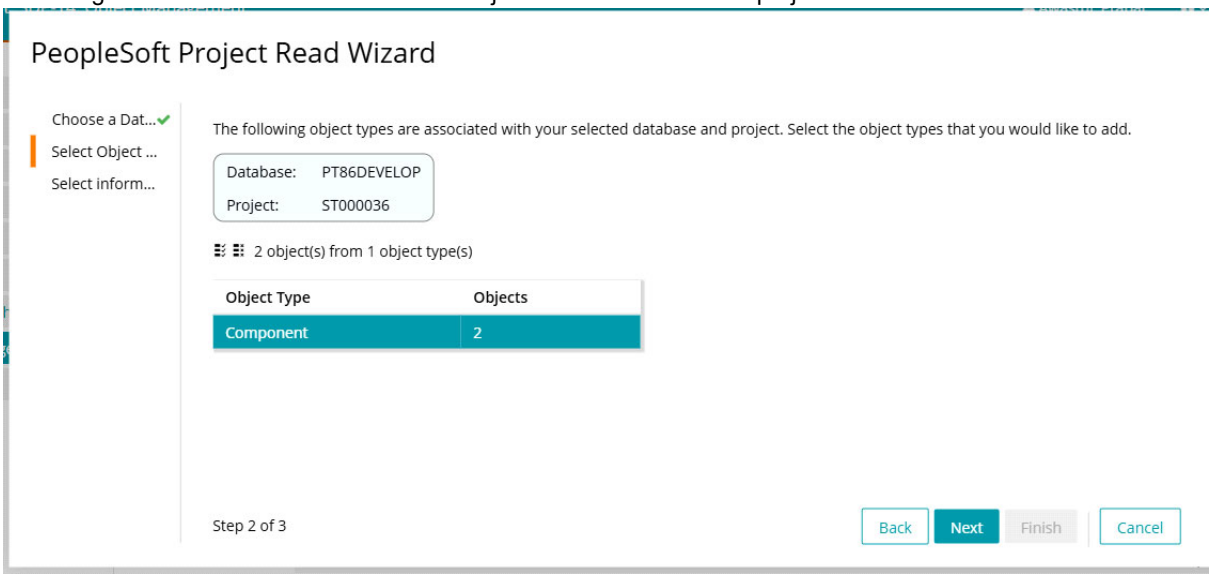
When we look using the *Open Date* attribute, then Stat searches for all CSR which were opened on the chosen date.

Adding from PS Project

Users can add objects directly from PeopleSoft projects. Based on the inputs provided, the Stat Web Client shows the number of objects associated to that particular PS Project.

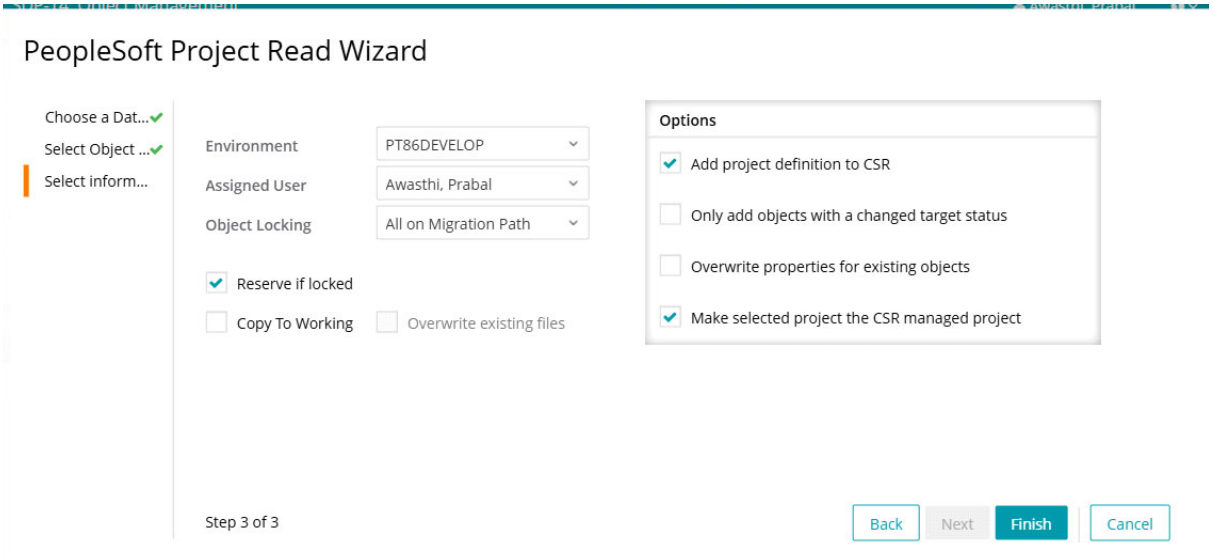


Following screenshot shows the number of objects associated with PS project.



A user can choose the object types that they want to go forward with. This list only contains object types that are supported by Stat. The unsupported object types will also be mentioned in the same page, but in a different table.

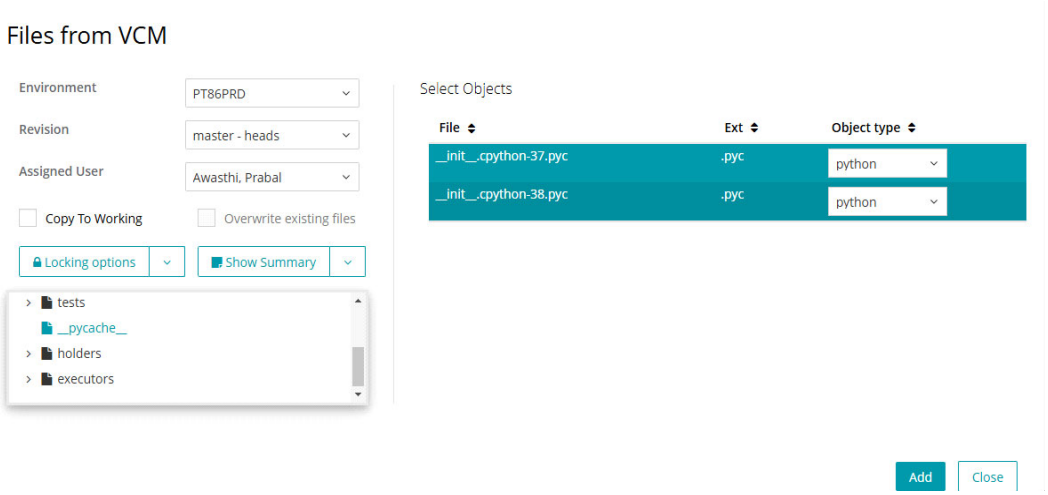
Once the user moves to the next page, they can select all the options below. The options work the same way as they do in the Stat Windows Client.



NOTE: The environment selection in this page is necessary if the *Current Environment* locking option is selected. The *Current Environment* locking option will apply locks only on those objects which are mapped to the environment selected in the above page.

Adding From VCM

You can use the *Add Objects to a CSR from VCM* feature to add multiple file objects at once to your CSR from a VCM repository. Following operations are supported for an imported VCM repository:



Revision

Revision drops down will let you choose the revision/label of the VCM repository. For example, for a git repository, you should see all the branches of your repository.

Once a revision has been picked, the web client should refresh the list of files in the right panel.

Copy to Working

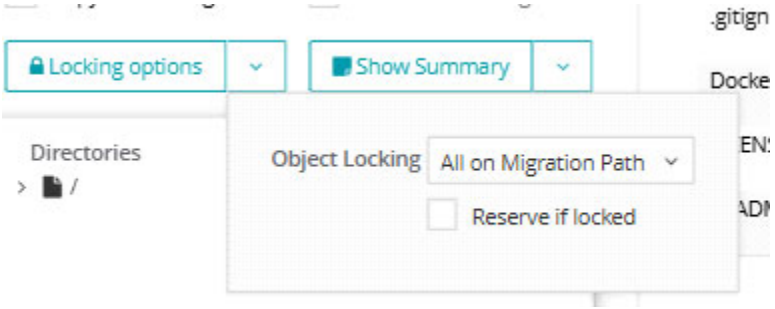
If checked the file objects you have selected (in the right panel) will be copied to your working directory from the VCM repository and added to the CSR once the objects have been added in the CSR.

Overwrite Existing Files

Any selected file objects (in the right panel) with the same filename as any files in your working directory will replace those files when used in conjunction with Copy to Work. Otherwise, identical filenames won't be replaced when left unchecked.

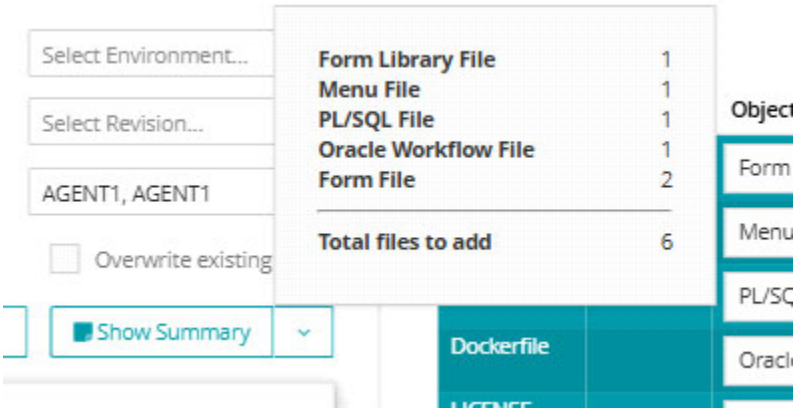
Lock Options

The user can select the lock option using this button. To use this option, click on the *Lock Option* button. The button should expand, and the lock options should be visible.



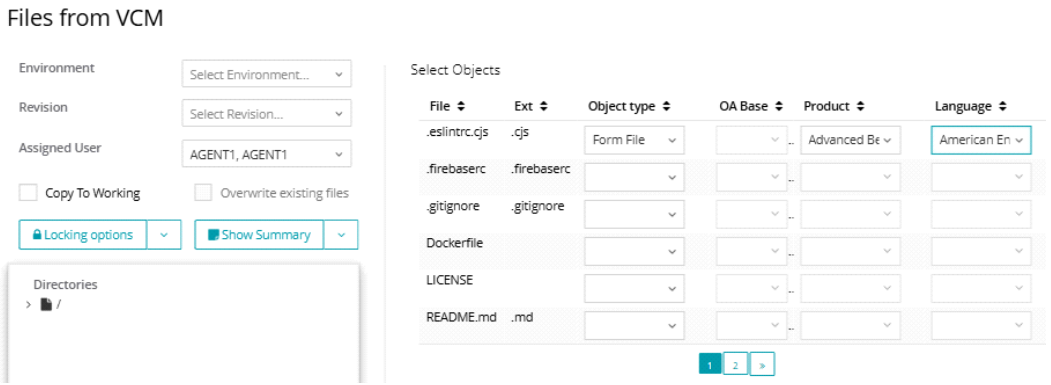
Show Summary

This button can expand and show the user the summary of all the objects that have been selected until now.



EBS specific VCM options

For EBS CSRs the right-side panel will have a different set of options (picture below). Options like *OA Base, Product, Language* may not be applicable to some object types. In that case, these options will be disabled.

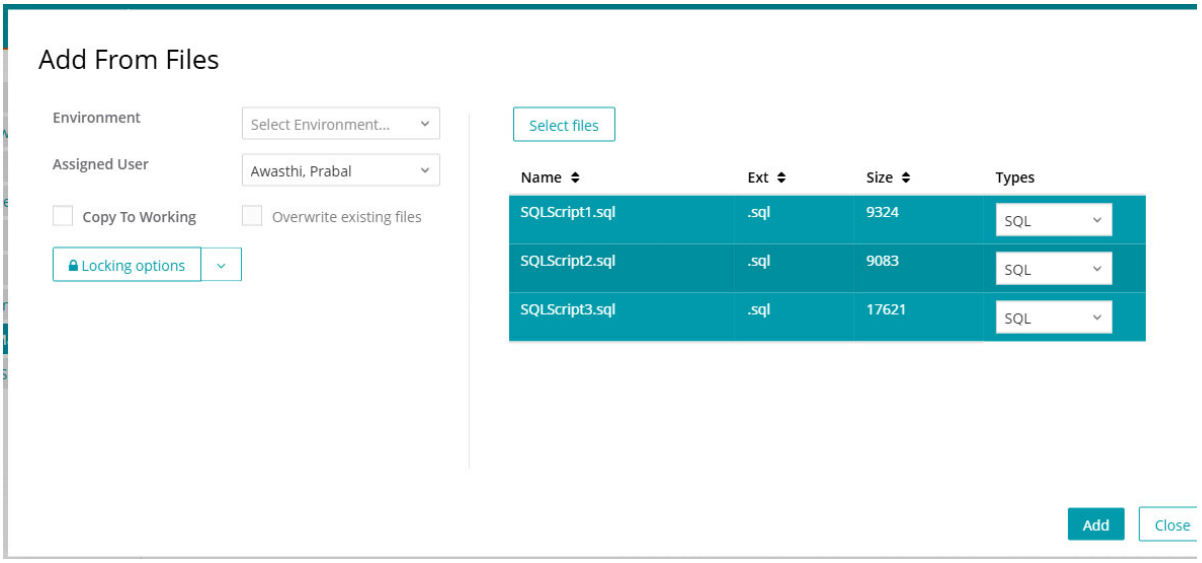


Adding from a file

Stat links each file with a file type based on the file's extension and adds the file objects to your CSR. Stat will link files with SQL extension, for instance, to the file type that your system administrator has chosen for that extension. Stat asks you to choose the desired file type if multiple file types have been defined with the same extension.

When User wants to add objects from **"Add from Files"** option, the Web Client opens a popup to select the files. Users can select multiple files if they want.

After selecting the files, the user needs to mention the File types and then needs to click on Add Button. Then the Web Client adds the selected objects in the Object tab and starts saving the objects.



Syncing a project

If your CSR has a managed project, you can ensure that your CSR has the exact same objects as your project.

This is useful in case when your project's object definitions are subject to frequent changes.

Clicking **Synchronize** makes Stat fetch the project definition from any database as defined in the CSR's migration path and updates the CSR's object list in the following method:

- If the project contains an object that is not in the CSR's object list, the object will be added to the CSR.
- If the CSR contains an Application Designer object that is not part of the project definition, you are prompted to remove this object from the CSR's object list.

NOTE: This does not apply to file objects, data objects or Non-Application Designer objects. Also, objects are removed only if you have the security permission to remove objects from a CSR.

- If the copy and upgrade properties of an object are different from the properties in the CSR, the object properties in the CSR are updated (same as selecting the Overwrite properties of existing objects check box in the Read Project Wizard).
- If the project definition is not associated with the CSR, it will be added to the CSR.

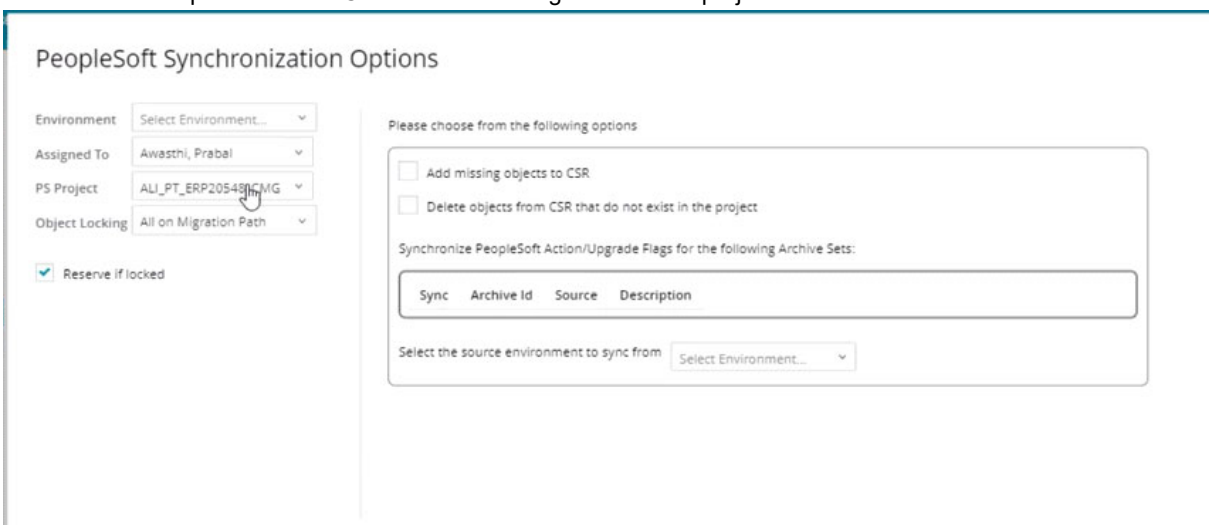
Perform following steps to use the above feature in the web client:

1. Click on the Add object button in the Object Management tab.
2. Go to the Synch Project menu item. This should open a popup window.
3. Select the Environment assigned to, PS project and Object Locking options in the left section.
4. The Environment is needed by Stat to determine on which environment we can add the lock/reservation. This is mainly needed if *Current Environment* is selected as the Object Locking option.

5 Select the source environment of your project and then click on Synchronize.

6 Select the *Add missing objects to CSR* if the user wants to add objects which are added in the project definition but are missing from the CSR.

7 Select the *Delete objects from CSR that do not exist in the project* if the user wants to remove all objects which are present in the CSR but are missing from the PS project definition.



Creating new objects in PeopleSoft

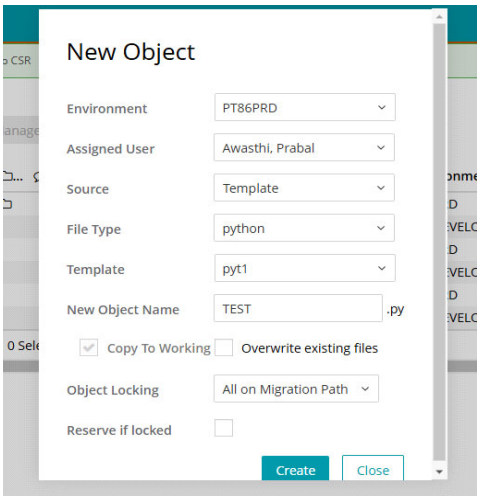
You can make a new file object, add it to a CSR, and move it to the designated developer's working directory if you have the necessary security rights. You have two options when creating a file object: you can start with an existing object or use a file template.

Creating a new object from template

1 Click *New Object*. **New Object** popup is shown.

2 Select the object source, file type and the other required fields.

3 Click **Create**.



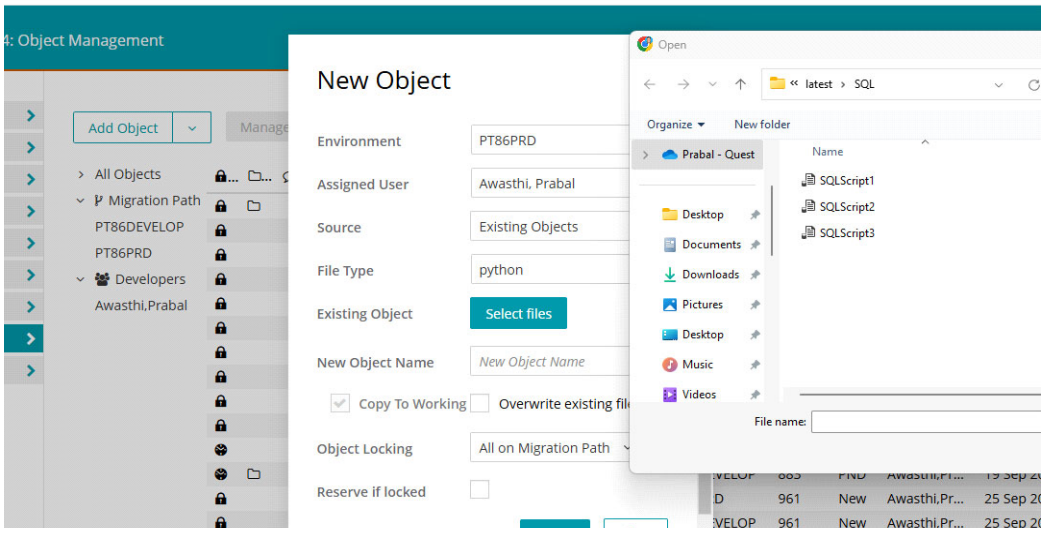
Creating a new object from an existing object

You can create a new object from an existing object by selecting the object from a location in your desktop system.

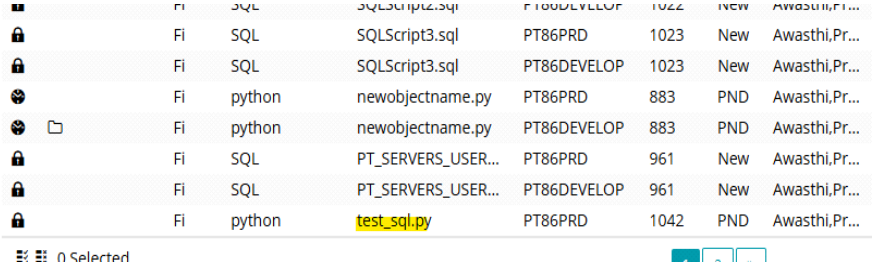
1 Select **Existing Objects** as **Source** in the **New Object** popup.

2 Click **Select Files**. You can only add a single file.

3 Click **Create**.



Object will be created and added to the object pane.



Creating a New Object in EBS

You can create a new object in EBS feature by choosing the existing object from their current EBS environment. The chosen object needs to have *Existing Objects* as the source in EBS. This process differs from PeopleSoft, where a user needs to upload a fresh file from their local computer.

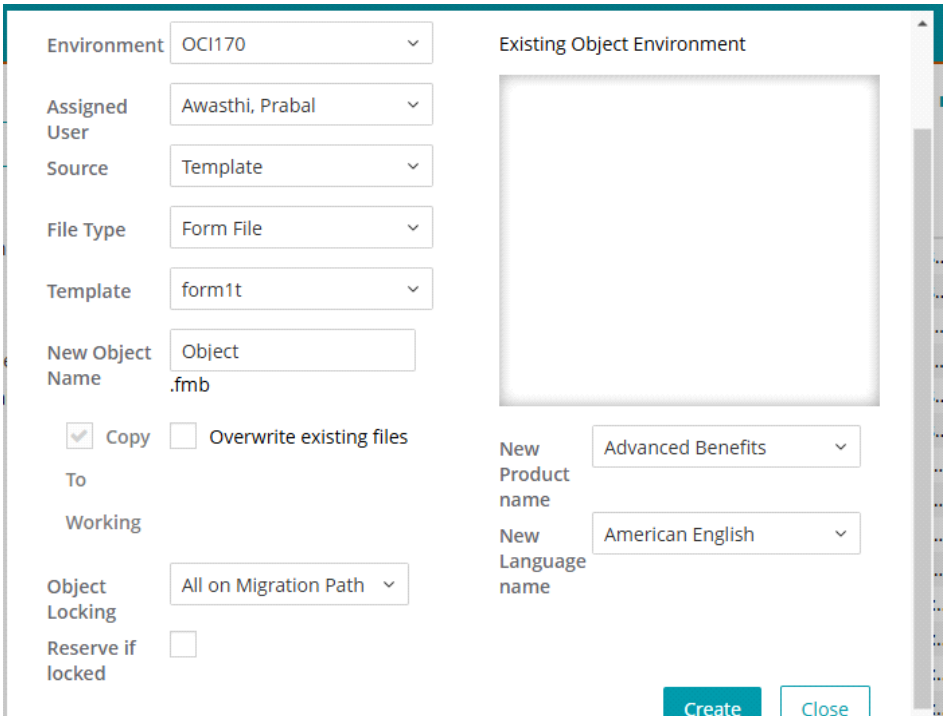
New Object from Template

1 Fill all the required fields such as – Environment, Assigned User, Source and file type.

2 Select the source as template and assign a name to the new object.

3 STAT web client will create the object based on defined template in the Object type.

4 Once all information is entered, click **Create** to create the new object for EBS.



New Object from Existing Object

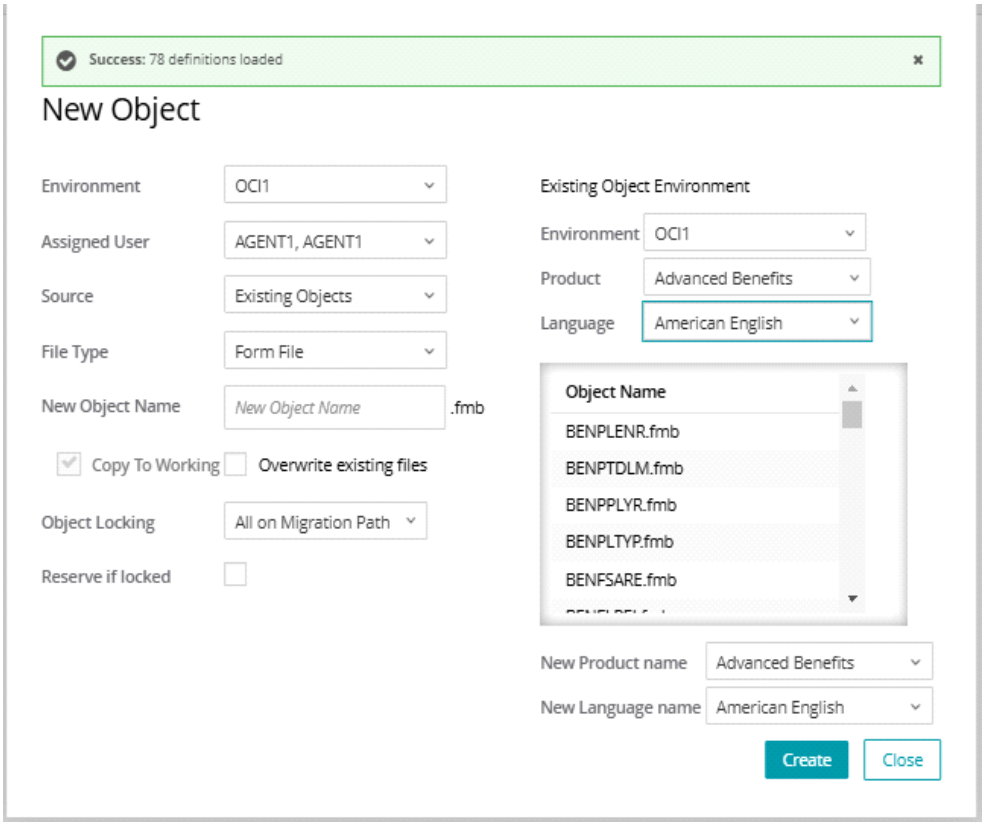
In a similar manner, a user can generate an object from existing objects within EBS as described below.

1 Fill all mandatory fields, including Environment, Assigned User, and File Type.

2 In Source column, choose existing objects

3 An additional section will appear on the right side of the New Object Window.

After specifying the Environment, Product, and Language, all relevant objects will be displayed in the detail grid. From this grid, user can select the object they wish to create as a new object.



Managing Objects

The state of the CSR objects can be managed from the Stat Web Client.

Changing the Lock Status

In the **Objects** tab of the CSR window, you can view the objects that you have locked/unlocked or reserved. The user can lock/reserve/unlock the objects as required.

The updated status of locks and reservations will be shown in the CSR object list table.

Removing an object

To delete items from a CSR, select the desired objects and click **Remove**.

The selected items will be deleted from both the CSR List and all associated archive sets.

Reassigning objects

To assign an object to a different developer:

1. Select the object(s) in the object list.
2. In the **Assigned To** field, select the developer you want to assign the object(s) to.
3. Click **OK**.

Viewing the Lock Status

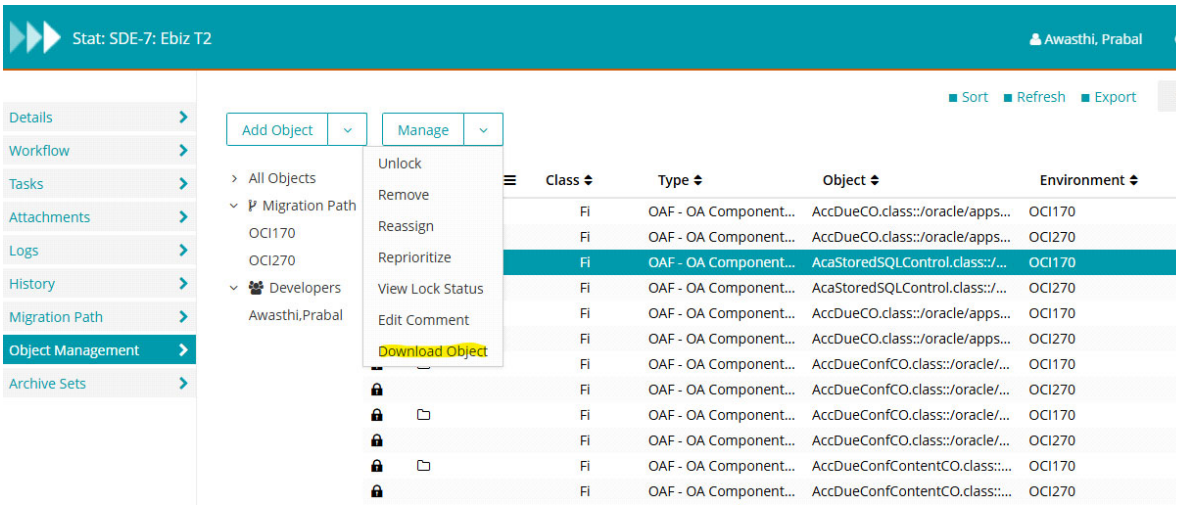
Select the **View Lock Status** option, to access a list of CSRs associated with the chosen object.

Editing Comments

This interface allows you to modify or append comments related to an object. It is advisable to use this section to record the alterations implemented, the rationale behind them, and any additional relevant details. Furthermore, you can cut, copy, and paste content within this window. Comments can be added upto a maximum length of 2,000 characters.

Downloading Objects

To download a single file object from the environment, select the object from the list and then click **Download**.



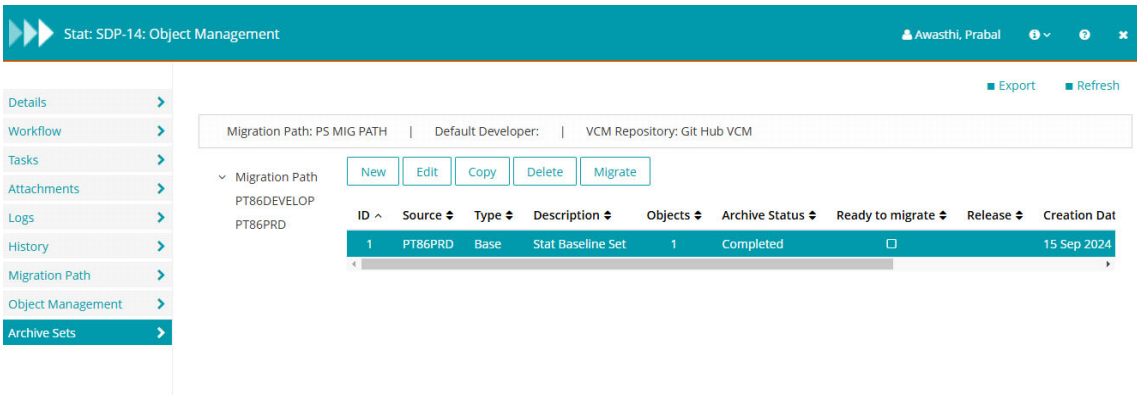
Archive Sets

With its own Stat repository, Stat enables developers to record and save object states from certain settings. Multiple object versions can be stored for a long time using this method outside of the PeopleSoft/EBS/General Applications ecosystem. Consequently, engineers are able to keep track of past modifications and go back to previous iterations as needed.

The archive sets table features the following short cut buttons:

- New: Opens the Archive Set window where you can define new archive sets
- Edit: Opens the Archive Set window where you can edit the selected archive set
- Delete: Deletes the selected archive set
- Copy: Copy the Archive set by using the copy button
- Migrate: By using this button the Migration Starts.

The archives are now visible in the STAT Web UI's newly added Archive Sets option. You may also make temporary archive sets while you work with the objects. This essentially serves as a continuous support for your efforts.



Your system administrator must enable the creation of archive sets containing file objects, data objects, and PeopleSoft proprietary objects at the service domain level.

Archive Set Types

You can use Archive Sets to restore objects to PeopleSoft environments and move finished modifications.

Archive Sets have Base, Interim, and Final archive sets as the three primary categories. Additionally, two other types also exist that are automatically generated by Stat: Merged and Point-to-Point.

A Point-to-Point archive set is the outcome of using the Point To Point Wizard to avoid directly migrating a PeopleSoft project between environments, whereas a Merged archive set is the product of using the Object Merge Wizard to combine the definition of two versions of the same PeopleSoft proprietary or data object.

Base Archive Sets

Once items are locked, Stat generates the basic archive set automatically when you save your CSR. The Base environment in your migration path is used to construct the base archive set. For every migration path, the Base environment is determined by your system administrator.

Interim Archive Sets

You can store the altered objects in temporary archive sets as you make changes to them. Although the source environment is Development by default, interim archive sets contain objects that are presently being modification and can be taken from any environment on your migration path. If the archive set includes file objects, the developer's working directory or the initial source location specified for the given environment are where the file objects are archived.

Final Archive Sets

You must produce a final archive set as soon as your modifications are finished and authorized. The final archive collection is static, and while creating one is not required, it is highly advised. Once a CSR is formed, objects cannot be added to it; it can only have one final archive set. Stat adds all CSR items to the final archive set automatically at the time of creation.

Creating Archive Sets

As you make your changes to objects, you should periodically make interim archive sets. This lets you save your work at that point in time. When all your changes are completed and approved, you should make a final archive set. The procedure for both is the same.

To create an archive set:

1 In the Archive Sets tab of the CSR window, click **New**.

This opens the Archive Set tab.

In the Archive Set tab, you enter basic information about an archive set. From here you define the archive type and source environment and add a description and comments. This window also provides you with read only information, such as number of objects and the time and date the archive set was created.

2 In the **Type** field select the type of archive set you want to create.

Options include **Interim** and **Final**. Base sets are automatically created by Stat.

> **NOTE:** You can create unlimited number of interim archive sets, but only one final archive set.

3 In the **Environment** field select the environment containing the objects you want to include in the archive set.

This environment should be the one in which you made your changes. The default environment for interim archive sets is Development.

> **NOTE:** If the CSR contains a reserved object for the selected environment, you cannot create a final set. If the CSR contains an unlocked object for the selected environment, you can create a final archive set but Stat displays a warning message.

4 In the **Description** field, enter a short description of the changes you made to the objects.

This entry helps identify the archive set elsewhere in Stat.

5 If you are adding file objects to the archive set, do one of the following in the **Files From** field:

- Select **Environment** if the source environment is Development and you want to take the file archives from the environment's source file locations
- Select **Working** if the source environment is Development and you want to take the file archives from the assigned user's working directories. Or select **No** if you want to take the archives from the source file locations of Development.
- Select **VCM** if you have associated the CSR with a version control management record and you want to take the file archives from the VCM repository. After selecting this option, a VCM-specific field is displayed (**Revision** for SVN and P4, **Tag/Branch** for CVS and Git, **Label** for PVCS, and **Version** for TFS). In this field you can specify the particular version of the objects you want to add from the VCM repository. Your system administrator may have configured a default value, but you can override it either by entering the version you want manually or by clicking the control button and selecting the version from the dropdown list. If left blank, Stat adds the most recent version of the objects in the repository.

> **NOTE:** When you save the archive set, Stat retrieves the objects from VCM repository. Your system administrator can configure Stat to archive the objects themselves or pointer to those objects.

6 (Optional) If you want to include the archive set in a mass migration based on application release label, select the release label you want in the Release field.

7 (Optional) Enter comments about the archive set.

Comments can include a longer description of the changes or any other helpful information.

8 Click on the Objects tab and click **Add...**.

Stat opens the Select Objects tab, which displays a list of the objects contained in the base archive set.

> **NOTE:** When creating a final archive set, Stat automatically adds all the objects in the base archive set and does not open the Select Objects tab.

To sort the rows in the Select Objects tab, click a column heading to have the rows sorted based on that column.

9 Select the objects you want to add to the archive set.

An interim archive set can contain one, some, or all the objects in the CSR.

10 If you have performed previous migrations or deleted objects on the CSR, check the existence of each object by selecting it and clicking **Check Existence**.

Stat goes out to the source environment or file locations and looks for the object. If it finds the object it displays the value **Yes** in the corresponding **Exists** field. If the object does not exist, Stat displays the value **No**. Objects that do not exist in the source environment cannot be included in the archive set.

11 Click **OK**.

This returns you to the Archive Sets tab in the CSR tab, which shows your new archive set at the bottom of the Archive Set table. The Status column will display the value In Process until the Stat Central Agent finishes archiving all the objects.

NOTE: Archiving objects is an optional function of Stat. If your system administrator sets up Stat to create archive sets, object archiving occurs automatically.

Archive Set Object Information

To see the details of your archive set, double-click on it in the Archive Set table. This re-opens the archive set window. The Details tab should look familiar since this is the tab you filled out when you created the archive set. The next tab, Objects, now contains all of the object information for the archive set.

NOTE: After adding objects to an archive set, the Migration Flags tab is added to the Archive Set Window. For more information, see Deleting Objects on page 46.

The Objects tab displays the following information:

Migr Order

For schema objects, file objects, and setup objects only, indicates the order in which the object will be migrated relative to the other objects in the archive set. Objects assigned a lower number are migrated before objects assigned higher numbers.

NOTE: The default migration order is based on object type and is defined in the Object Type Maintenance table. You can override the default order by specifying a higher or lower value for one or more objects. You can change the migration order values manually, or you can use the **Default Order** and **Reorder** buttons, which are described below.

Class

Indicates the class of object. Object classes include data and file.

Type

The object type.

Object

The object name.

Version

A version number internal to Stat. It indicates the number of times the object has been modified/archived in Stat for a given environment.

Status

Reflects the current status of the object. Possible statuses include:

- **Archived** – Indicates Stat finished archiving the object
- **Archive Pending** – Indicates Stat is in the process of archiving the object
- **Wait Lock** – Indicates Stat is waiting for Stat to issue the objects in this CSR a lock. You can archive only locked objects.
- **Delete Pending** – Indicates Stat is in the process of deleting the objects
- **Re-archive Pending** – Indicates Stat is in the process of archiving the object again

Errors

Indicates the number of errors found. See the Logs window for further details.

Warning

Indicates the number of warnings found. See Logs window for further details.

Source Information

If the object is a data object, this field shows the number of tables and rows in Stat used to complete the archive. If it is a file object, the field shows the exact file location of the archive source in the archive set.

Object Count

This information is displayed at the bottom of the window. It shows the total number of objects in the archive set and how many of these have been archived.

Generation Schema

For any Oracle Apps file type that has been marked as a database script (including SQL Scripts and SPL/SQL, PKB, and PKH file object types as well as custom object types marked as database scripts), this drop-down list displays the list of products that are present in Stat for the source environment. If a value is selected in this column, the object is generated on the target environment using this schema. If the value is blank, the default APPS schema is used.

Buttons

The Objects tab features the following short cut buttons:

- **Add** – Adds selected objects to the archive set. Press this button and Stat displays a list of the objects.
- **Delete** – Deletes all of the objects in the selected archive set. You cannot delete objects from a base or final archive set.
- **Re-Archive** – Instructs Stat to re-archive the objects
- **Refresh** – Refreshes the current display
- **Print** – Prints the contents of the window
- **Export** – Exports the contents of the window

  NOTE: Once an archive set has been migrated, you cannot add or delete objects from it. You should create a new archive set instead.

- **Default Order** – For schema objects, file objects, and setup objects only, restores the migration order of selected objects to the default order as defined in the Object Type Maintenance table
- **Reorder** – For schema objects, file objects, and setup objects only, changes the migration order of selected objects starting with the numerical value specified in the field positioned above the button and in the order in which they are listed in the Objects tab. This provides a convenient way to change the migration order of multiple objects simultaneously. For example, assuming 5 as the starting value, the first selected object is assigned the value 5, the next selected object is assigned 6, and so on.
- **View** – For file, schema, and setup object types only, displays the definition of the selected object in a separate window.
- **Download** – Allows users to download the selected file or schema object from archive.

Copying Archive Sets

When you copy an archive set, the copy retains the migration order set on the source archive set.

To copy an archive set:

1 In the Archive Sets table, select the archive set you want to copy and click **Copy**.

> **NOTE:** Only archive sets with a complete-type status can be copied.

This opens the Archive Set window where you can edit the properties of the copied archive set as needed, including the archive type and source environment.

When copying archive sets, be aware of the following:

- You can select a different source environment, but if the objects don't exist in the new source, you have to add the missing objects if you want to include them in the copy.
- When you save a copy as a final archive set, the number of objects in the archive set must equal the number of objects in the base archive set. If not, Stat prompts you to add the objects when you try to save the archive set.

2 Add a description of the archive set, and (optionally) edit the properties of the archive set as needed.

3 Click **OK**.

Deleting Objects

Stat lets you delete unwanted objects from selected Oracle Applications environments along a migration path. After adding the unwanted objects to an archive set, you can mark them for deletion. When you migrate an archive set containing objects marked for deletion to an environment, Stat deletes them from that environment. However, you can always recover deleted objects since they remain archived in the Stat Repository.

To mark objects for deletion:

1 Add the objects to the archive set.

2 When the Archive Set has completed, open the Migration Flags tab of the archive set.

3 In the **Action** field, change the setting to **Delete**.

4 Click **OK**.

If you decide that you do not want to delete an object marked for deletion before you migrate it, go back to the Migration Flags tab and in the Action field change the setting to **Copy**. Stat is now configured to migrate the object as it normally would by placing a copy of the object in the target environment rather than deleting it.

> **IMPORTANT:** When you migrate an object marked for deletion, the object is deleted from that environment and cannot be included in any later archive sets taken from that environment. Because of this, it is recommended that you create an interim archive set of all of the objects that are marked for deletion before you migrate them. You can then migrate the interim archive set to each environment in which you want to delete the objects.

Archive Set Logs

The Logs tab of the Archive Set window displays any messages Stat logged during the archive process.

This tab provides you with a complete list of messages logged by Stat. It is a running log of the activities involved with the archive sets.

The Logs tab displays the following information:

Date and Time

The date and time the message was logged.

Object

Archive sets are created by processes run by different objects in Stat. These object processes each have their own capabilities and tasks. The Object column displays the Stat object that reported the message. These objects include:

- **Mgr** – The manager object creates, destroys, and instructs all the other objects
- **Trg** – Indicates the target environment
- **Src** – Indicates the source environment

Type

There are three types of messages: Information, Error, and Warning.

Information

The text of the message.

Buttons

The Objects tab features the following short cut buttons:

- **Next Error** – Navigates you through your error/warning messages
- **Print** – Prints the contents of the window. Pressing this button automatically sends a job to the printer. There are no print options.
- **Export** – Exports the information in this window. Pressing this button opens a Save As window. Several file types are available for selection using the vertical scroll. An Excel format is most useful for evaluating this data.
- **Clear** – Clears the logs generated for this archive set

Re-archiving Objects

If for some reason the Stat Central Agent is unable to create an archive set without errors, rather than creating a second archive set, you can simply re-archive selected objects in the original archive set. When you re-archive objects, the Stat Central Agent deletes the original archive set and creates a new archive set containing only those objects you selected.

Although you can re-archive objects in any archive set, even those that were created without errors, you should only re-archive objects that were not successfully archived the first time. If you want to re-archive objects in an archive set that was created without errors, you should create an interim archive set.

To re-archive objects, in the Objects tab, select the objects you want to re-archive and click Re-Archive.

8

Object Migration

The previous chapter explained how to archive objects by creating archive sets. This chapter explains how to migrate archive sets between your Oracle Applications environments.

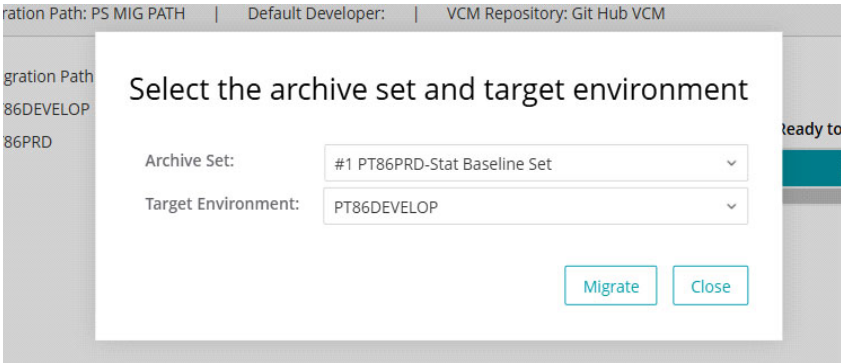
Migrating objects updates your environments with the most recent version of those objects, or, if necessary, lets you roll back your environments to earlier versions.

The Stat Web Client only supports migration of single archive sets.

Topics:

Choosing an archive set for migration

1. Go to the **Archive Sets** tab.
2. Click **Migrate**.
3. In the pop-up shown, select the archive set and the target environment, and click **Migrate**.
4. You will be redirected to the migration window where you can configure all the necessary inputs needed for the actual migration.



Running a migration (EBS)

To run a migration:

1. Open the CSR window and do one of the following:

- In the **Migration Path** tab, click and hold your cursor over the source environment for the archive set and drag and drop it in the target environment.
- In the Archive Sets tab, click Archive Sets to display the Archive Sets table. Then drag and drop the archive set you want from the table to the target environment's tree node.

IMPORTANT: Before you can migrate an archive set into an environment that requires migration approval, one or more authorized users must approve the migration.

2 Stat opens the Migration window.(Optional) If you want the Stat Central Agent to process the migration job at some later time, enter the date and time in the **Migration Date** field.

The field defaults to the current date and time. You can schedule the migration up to 90 days in the future.

3 (Optional) In the **Description** field, enter a unique description of the migration.

The field defaults to CSR ID+Archive ID.

4 (Optional) Select the **Stop on Error** option if you want the Stat Central Agent to terminate the migration at the first error it encounters.

System administrators may set this option to be selected or de-selected by default.

5 (Optional) De-select the **E-mail Notification** option if a business rule or personal rule triggered by a migration event has been defined for the service domain and you do not want Stat to send email notifications that may be triggered by the migration.

This option is selected by default and is displayed only if one or more Migration Notification business or personal rules have been defined for the service domain. Fore more information, see Defining Personal Rules on page 77.

6 (Optional) Select the **Maintenance Mode** option if you are on Oracle Applications version AD.I and want Stat to put the environment in Maintenance Mode when migrating objects.

The **Maintenance Mode** field is disabled if you are on an earlier version than AD.I. For more information on Maintenance Mode, see your Oracle Applications documentation.(This option does not apply to R12.2 environments.)

7 Select the archive set you want to migrate.

The window displays a list of archive sets that you can migrate from the selected environment. If you initiated the migration from the Archive Sets tab, the list displays only the archive set that you dragged and dropped onto the target environment.

By default, all the objects in the archive set are selected for the migration. However, with the appropriate security rights, you can exclude either all the file objects or all the database objects from the migration. You can also exclude individual objects.

8 (Optional) De-select the class of objects (file objects, setup, or schema objects) you do not want to migrate.

9 (Optional) In the **Migrate** column, de-select the individual objects you do not want to migrate.

NOTE: If an Oracle Apps file object type is flagged as a database script, the Stat Oracle Agent executes these objects using sqlplus during a migration. The Oracle agent only looks at the return code from sqlplus to determine if the migration was successful or not. The following statement should be included with all scripts to instruct sqlplus to return a non-zero return code if errors are encountered:

```
SET VERIFY OFF
WHENEVER SQLERROR EXIT FAILURE ROLLBACK;
WHENEVER OSERROR  EXIT FAILURE ROLLBACK;
```

If you are migrating to a distribution environment, the window displays the list of active target environments. By default, each environment in the distribution list is selected as a target. However, with the appropriate security rights, you can exclude certain environments from the migration.

10 (Optional) If migrating to a distribution environment, de-select any environment in the list of active target environments you want to exclude from the migration.

11 If the archive set contains file objects and the target environment is Development, select one of the following options in the **Migrate file to** field:

- **Development Env** – Select if you want to place the file objects in the source file locations of the Development environment
- **Working** – Select if you want to place the file objects in the developers' working directories. Only the file objects assigned to each developer get copied into their working directories.
- **Dev & Working** – Select if you want to place the file objects in both the source file locations and the working directories. If the archive set does not contain any file objects or the target environment is not Development, this option is dithered with a value of "NA."

12 If the target environment is version R12.2, select the file system to which you want to migrate file objects in the **Edition** field.

Options include **Run**, **Patch**, or **Both**.

> **NOTE:** R12.2 application tier file system has 2 copies of all files. A "Run File System" where all the services are currently running from, and a "Patch File System" where all patches are applied in a patch cycle. A patch cycle starts when the prepare phase of adop is run and the "Run File System" is copied to the "Patch File System."
>
> Stat archives file objects from the current Run Edition.The **Edition** field is only displayed if the target environment is R12.2 or higher.

13 Click **Migrate**.

At this point, Stat may prompt you to select and order the pre and post migration steps (if any) that have been defined for the target environment or for the objects or object types in the archive set.

14 Select pre and post migration steps, as necessary.

For more information, see Validation in PeopleSoft migrations on page 54.

15 After selecting the pre-migration steps, click the **Migrate** button.

Stat opens the CSR Migrations Console, which shows that the migration job has been submitted to the Stat Central Agent. The Agent either begins processing the migration immediately, or if you scheduled the migration, at the date and time you specified. For more information, see Migration Console on page 48.

16 If you are only migrating file objects, Stat copies the file objects into the target environment.

Pre and Post Migration Steps

Pre and post migration steps define certain activities you should perform before and after migrating an archive set. Migration steps are performed either manually by the user or automatically by Stat. The steps are meant to promote adherence to development standards and are not mandatory or enforced.

Pre and post migration steps can be associated with object types, object classes and with target environments. This means that when you initiate a migration with an archive set that includes an associated object type or class, or when you initiate a migration to an associated target environment in either a single or a mass migration, Stat opens the Pre Migration Steps window. This window displays a checklist of recommended actions that should be taken before the archive set is migrated.Regarding Pre and Post Migration Steps windows:

> **NOTE:** System administrators can define pre migration steps that are not associated with either an object type or an environment. In this case, the step is triggered for all migrations.

- If the target environment is also a distribution environment, the distributed environments are listed in italics
- For mass migrations, the CSR id is also listed on the left side of the window
- The windows can also be opened from the Environment Status window and from the search results window of the Migration History Wizard

Unlike the Pre Migration Steps window, the Post Migration Steps window is not opened automatically. Instead, post migration steps have a default status of **Pending**, which means that until the user changes the status of a post migration step to either **Complete** or **N/A** (Not Applicable), the migration will have a status of **Wait for Post Step** in the Migration Console. This is how Stat prompts users to complete post migration steps as intended. Once all

the post migration steps have been marked as Complete or N/A, the status of the migration will change to **Complete**.

Running Custom Command Migration Steps

Automatic steps consist of custom commands defined by your system administrator. For more information on automatic steps, see the *Stat System Administration Guide*, Chapter 5, “Service Domain-Specific Maintenance.”

To execute an automatic step, click **Run**. Depending on the step, Stat may prompt you to specify additional parameters.

Custom commands are operating system commands executed by the client server that Stat is running on. When a custom command step is triggered, Stat opens the Custom Command Variables window. Here you can edit the command by adding or replacing parameters as needed, or you can run the command directly.When defining a command, system administrators can include predefined parameters and user and server-based parameters that have been defined in Stat. This provides a convenient way to specify values commonly invoked by operating system commands, such as server names and download directories. In addition, parameters offer a way to secure sensitive information by encrypting values that you do not want visible to users, such as passwords.

Predefined parameters specify values used to login to a target environment during a migration (database name, user name and password), whereas user and server-based parameters generally invoke values specific to the users and file servers defined in Stat. Also, certain parameters may be defined so that their values are different depending on which user or server they are being applied to. For more information on pre and post migration step parameters, see the *Stat System Administration Guide*, Chapter 4, “General Maintenance Tables”.

To edit a custom command migration step:

1 In the **Command with parameters** field, enter the command you want Stat to run.

If you want to include parameters in the definition of the command, click the location where you want to insert the parameter and then double-click the parameter you want to insert. When included in a command, parameters are enclosed in double % signs, for example, “%%GL_PWD%%”.

Certain users and servers may have parameters that have been defined exclusively for them, or the value of a particular parameter may be different depending on which user or server it is being applied to. When the Stat Command Editor is first opened, the parameters are listed as they have been defined for the local client server and the current user. If you want to include parameters defined for a different server, click the **Server** field and select the server you want. Although you cannot select a different user in the **User** field, when a user executes the command when performing a pre or post migration step, they will have the option of inserting their own parameters or overriding default values.

> **NOTE:** System administrators can restrict user access to certain servers at the service domain level. The servers displayed in the **Server** field drop-down list may be limited if the server access of the current user has been restricted. For more information, see *Stat System Administration*, Chapter 3, “Stat Security.”

2 If the command you want to execute opens a window, specify if you want the window minimized, maximized, or normal size.

This value is saved and used at run time.

3 Click **Interpret >>**.

The **Interpreted Command** field displays how the command is interpreted by the client server. Null values and encrypted values are enclosed in angle brackets. Encrypted values are not displayed but replaced with asterisks.

4 (Optional) Verify that you defined the command properly by selecting the server you want to use to test the step in the **Server** field.

> **NOTE:** This is for testing purposes only. During execution of the step a user can select a different server.

5 Click **OK**.

To run pre and post migration steps:

1 In the Pre or Post Migration Steps windows, run each automatic step you want Stat to perform, specifying any additional parameters you want.

2 Select **Complete** for each step that Stat performs successfully.

> **IMPORTANT:** Stat displays an error message if it is unable to execute an automatic step. Also, Stat does not notify you if it completed the step successfully but the external application encountered errors. For example, when running the Compile Command step, Stat only knows if the command was executed properly. It does not know if the compile was successful or not. In this case, you will need to check the compile yourself.

3 Complete any manual steps, or perform them at a later time as required. Then select **Complete** for each step you perform.

> **NOTE:** Until a post migration step has been marked as either **Complete** or **N/A** (non-applicable or not applied), the migration will have a status of **Wait for Post Step** in the Migration Console. Once all the post migration steps have been marked as **Complete** or **N/A**, the status of migration will change to **Complete**.

When defining a pre and post migration step, system administrators can specify whether the step should be automatically included for each migration or once per target environment. This prevents Stat from prompting users to run the same step unnecessarily multiple times.

4 Click **OK**.

At this point, Stat does one of the following, depending on the type of migration step:

- In the case of pre migration steps, Stat initiates the migration to the target environment.
- In the case of post migration steps, Stat displays the Migration Path tab, which shows the base archive set successfully migrated to the Development environment.

Your migration path now shows the base archive set in your Development environment.

The process is the same for migration of all types of archive sets.

Running a migration (PeopleSoft)

To run a migration:

> **IMPORTANT:** Before you can migrate an archive set into an environment that requires migration approval, one or more authorized users must approve the migration.

1 Stat Web Client can only perform migrations which have Auto Migrations option enabled. Manual migrations can still be started from the web client. However, when they have reached the PS Pending state, they will have to be finished by the windows client.

> **NOTE:** Auto migrations of PS proprietary objects which have been started by the Web Client will be processed by the Stat Central Agent. However, migration of PS proprietary objects started in Windows Client are processed by the Windows Client itself.
>
> Auto migrations of PS proprietary objects started by the Stat Web Client will never be picked by the Stat Windows Client for processing. Similarly, migrations of PS proprietary objects started by the Windows Client will not be picked by the Stat Central Agent.

2 (Optional) If you want the Stat Central Agent to process the migration job at some later time, enter the date and time in the **Migration Date** field.

The field defaults to the current date and time. You can schedule the migration up to 90 days in the future.

3 (Optional) To plan the migration for an unspecified date, clear the **Migration Date** check box. Planned migration can be initiated any time later by Stat Windows Client or by an external third party component

using a REST API call. See “Appendix: Stat REST Web Services API” in the *Stat System Administration Guide*.

4 (Optional) In the **Description** field, enter a unique description of the migration.

The field defaults to CSR ID+Archive ID.

5 (Optional) Select the **Stop on Error** option if you want the Stat Central Agent to terminate the migration at the first error it encounters.

System administrators may set this option to be selected or de-selected by default.

6 (Optional) De-select the class of objects (file objects or PeopleSoft objects) you do not want to migrate.

7 (Optional) In the **Migrate** column, de-select the individual objects you do not want to migrate.

If you are migrating to a distribution environment, the window displays the list of active target environments. By default, each environment in the distribution list is selected as a target. However, with the appropriate security rights, you can exclude certain environments from the migration.

8 (Optional) If migrating to a distribution environment, de-select any environment in the list of active target environments you want to exclude from the migration.

9 If the archive set contains file objects and the target environment is Development, in the **Migrate files to** field select one of the following options:

- **Development Env**– Select if you want to place the file objects in the source file locations of the Development environment
- **Working** – Select if you want to place the file objects in the developers’ working directories. Only the file objects assigned to each developer get copied into their working directories.
- **Dev & Working** – Select if you want to place the file objects in both the source file locations and the working directories.

IMPORTANT: If the Development environment is a distribution environment and the archive set has both PeopleSoft proprietary objects and file objects selected for the migration, the option **Working** cannot be selected. To migrate file objects to Working, deselect the **DB Objects** option.

At this point, if you are only migrating file objects, you are ready to start the migration and can skip to Step 14. The remaining fields are dithered if there are no PeopleSoft proprietary objects in the selected archive set.

10 Select a staging database.

IMPORTANT: When migrating archive sets, bear in mind the following:

- The base language of the staging database must be the same as the base language of the environment that the archive set came from (i.e., the source).
- If the staging database you selected is currently in use, Stat displays a message telling you who is using the environment. You can retry the environment, select another environment, or if you have the proper security rights, click the Unlock button to unlock the environment. This deletes the other developer’s objects in the staging database and replaces them with yours.

11 Select one of the following options to name the Stat-created PeopleSoft project:

- **Stat defined project** - Select this option if you want Stat to assign a name to the project. Stat-defined project names always use the naming convention, “ST######.”
- **User defined project -** Select this option if you want to assign a name to the PeopleSoft project. Then in the **Project Name** field enter the name you want.
- **Project in Archive Set -** Select this option if you added a project definition to the archive set and want to re-use the project name. This option is only available if the archive set and the project definition included in the archive set reference all the same Application Designer objects. This also applies to subobjects, meaning the option is not available if the parent objects have been removed either from the archive set or the project definition included in the archive set. The project definition

included in the archive set can reference subobjects so long as the subobjects' parents are in the project definition and the archive set.

> **NOTE:** The Upgrade and Action values for objects in the archive set are not used when you use a PeopleSoft project contained in an archive set to perform the migration. In this case the Upgrade and Action values are set at the time you archived the project definition and the Upgrade and Action flags set in the archive set are ignored.

- **Reuse project -** Select this option if you are migrating an archive set that was previously migrated using the same staging database, and you have not modified the archive set after its original migration. If you select this option, by default Stat restages the project in the staging database. However, you can de-select the **Restage objects** option if you do not want to wait for the objects to be restaged and you are sure they were staged successfully the last time.

  > **IMPORTANT:** PeopleSoft project definitions are stored in the Stat Repository, and the only way to update a project definition is through the Application Designer interface, which means that even if you change the archive set in Stat by adding or deleting objects, the project definition remains unchanged in Stat.

12 (Optional) Click the Audit Flags button to change the default audit flags and DDL settings for the project.

   This opens the Upgrade Options window where you can specify whether these properties will be copied into the target environment during the migration or whether the settings as defined in the target environment will be retained. Additional settings include portal structure permission lists, display size page property, and the database field format.

   > **IMPORTANT:** If you selected the **Project in archive set** option, you cannot modify the settings in the Upgrade Options window.

13 Click **Migrate**.

14 At this point, Stat may prompt you to select and order the pre and post migration steps (if any) that have been defined for the target environment or for the objects or object types in the archive set.

   For more information, see Unsupported step types in Web Client on page 57.

15 After selecting the pre and post migration steps, click the **Migrate** button.

   Stat opens the CSR Migrations Console, which shows that the migration job has been submitted to the Stat Central Agent. The Agent either begins processing the migration immediately, or if you scheduled the migration, at the date and time you specified. For more information, see Migration Console on page 48.

   If you are only migrating file objects, Stat copies the file objects into the target environment. If you are migrating PeopleSoft objects, what happens next depends on whether the CLI Auto-Migration feature has been activated for the target environment.

   If you are not auto-migrating, you need to open the PeopleSoft PeopleTools Application Designer and manually push the project from the staging environment to the target environment.

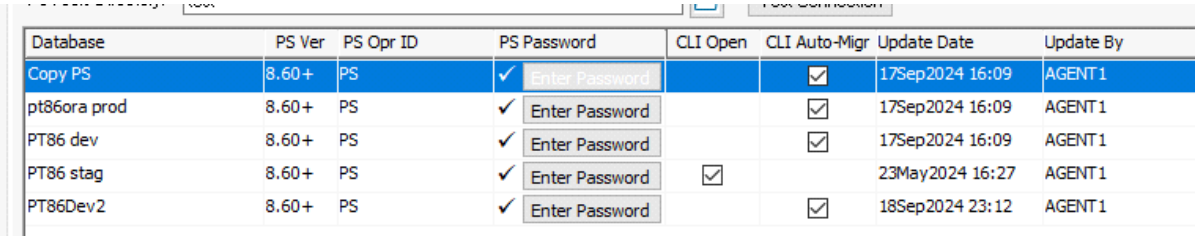
Validation in PeopleSoft migrations

For Stat to use Application Designer and data mover, some configurations are needed. If the necessary configurations are not provided, the migration process should fail gracefully.

Before a migration is started, some checks are made to ensure that the migrations are being handled under the right circumstances. We will mention those checks here and during the testing cycle it should be verified whether those checks are being respected.

- Only *completed* and *completed with warning* archive sets will be be migrated.
- When no objects are selected for migration, a warning is shown and migration discontinues.
- Two environments of different versions will not be able to migrate into each other.

- Auto migration should be enabled and PS opr id and PS password should be configured for the staging DB and the target environment.



Database	PS Ver	PS Opr ID	PS Password	CLI Open	CLI Auto-Migr	Update Date	Update By
Copy PS	8.60+	PS	✓ Enter Password		☑	17Sep2024 16:09	AGENT1
pt86ora prod	8.60+	PS	✓ Enter Password		☑	17Sep2024 16:09	AGENT1
PT86 dev	8.60+	PS	✓ Enter Password		☑	17Sep2024 16:09	AGENT1
PT86 stag	8.60+	PS	✓ Enter Password	☑		23May2024 16:27	AGENT1
PT86Dev2	8.60+	PS	✓ Enter Password		☑	18Sep2024 23:12	AGENT1

- Migration will not start if the staging DB is unreachable.
- PT server will be configured for the migrating user.
- If a staging DB is locked, a warning will be displayed.
- Staging DB related validations will not happen if PS proprietary objects are not being migrated.

Troubleshooting (PeopleSoft)

Sometimes while migrating PS proprietary objects, timeout issues can come. This is due to issues in Application Designer and not because of Stat.

These are the following cases when application designer can sometimes take about 2-3 hours to do a migration.

- You are using this Application Designer for the first time
- If the Application Designer is seeing this environment for the first time
- Application Designer has a cache directory, its been deleted
- There is some issue on the Application Designer end due to which it simply cannot perform any migration anymore
- Unfortunately, Application Designers don't communicate these issues very well in CLI mode. Therefore, the debugging will have to be done by someone who's familiar with the Application Designer setup and has access to the PT server.
- You can search for the string "extractSafeResult" in server.log to see which commands have been run against the Application Designer and which one timed out.
- Another suggestion - go to the PT server and open task manager. Check the processes list and find pside.exe. Kill all the pside.exe process and try the migration again

Migration Console

Once the migration starts, the migration console popup should open up on its own. You can also click on the ***Migration Console*** button on the top right of the migration initiation page. The results will depend on the options which have been selected on the Migration Console Configuration Window in Windows Client. Currently, the Stat Web Client doesn't allow you to change the configurations of the migration console. The migration console popup

displays the following information about a migration. Double-click a migration to see more detailed information, including log reports, approval statuses, and the migration status of individual objects.

Column	Description
Migr ID	The number that identifies the migration.
Status	The current status of the migration. Options include: Scheduled PS Waiting for Lock (PeopleSoft only) PS Lock Removed (PeopleSoft only) Canceled OA Generation Error (Oracle Apps only) Submitted Completed In Process PS Pending (PeopleSoft only) PS in Process (PeopleSoft only) Complete with Warning Complete with Error Waiting for Pre-Step Waiting for Post-Step Planned
Auto	(PeopleSoft) Indicates if the archive set was auto-migrated.
Schedule Date	If the migration was scheduled, the scheduled date and time
Start Date	Date and time the Stat Central Agent began migrating the archive set.
End Date	Date and time the Stat Central Agent completed migrating the archive set.
Duration	How long it took to complete the migration in hours, minutes, and seconds
Description	The description of the migration, either the Stat-assigned default description or the description the user assigned.
Archive ID	CSR archive set number.
Target Environment	The environment the archive set was migrated to.
Release	The release label assigned to the archive sets.
Module	The change management module in which the migration took place. Options include **PeopleSoft**, **Generic Applications**, and **Oracle Applications**.
Migration Type	Indicates how the migration was initiated. Options include: **CSR Migration** (drag and drop), **Rapid Recovery**, **Release Recovery**, **Mass Migration**, **Point-to-Point**, **Archive Sync**, and **Object Sync**.
Stage Environment	(PeopleSoft) the environment in which the PeopleSoft objects in the archive set were staged.
Staged	(PeopleSoft) Indicates if the PeopleSoft objects in the archive set were copied to the Staging database.
PS Project	(PeopleSoft) The PeopleSoft project that the archive set is associated with. This field is blank if the archive set did not include any PeopleSoft proprietary objects or if only the file objects of the archive set were migrated.
Canceled By	If the migration was canceled, the user who canceled it.

Column	Description
Submit Date	The date and time the migration job was submitted to the Stat Central Agent.
Migrator	The user who ran the migration.

Migration Details Window

The Migration Details window shows additional information about a migration, including the migration status of the individual objects, approval statuses, pre and post migration steps, and logs. To open the Migration Details window, do one of the following:

- In the Migration Console, select a migration and click the Migration Details button or double-click a migration row.

The top portion of the Migration Details window displays much of the same general information as the main console window, but with additional information, such as:

- Submit Date— The date and time the user ran the migration
- Schedule Date — In the case of scheduled migrations, the date and time the migration was scheduled
- Maintenance — For migrations to Oracle Apps environments, indicates whether Maintenance Mode was enabled or not.
- Migration Exit Option — Indicates whether Stat is configured to stop the migration if any errors are encountered
- Edition — For migrations to Oracle Apps R12.2 environments or higher, indicates the file system to which file objects were migrated. Options include Run, Patch, or Both.

The bottom portion of the Migration Details window displays the migration status of each object contained in the archive set, migration approval statuses, pre and post migration steps, and migration logs.

> **NOTE:** In the case of migrations to distributed environments, the Objects tab displays the migration status of each object to each environment.

In the Migration Details window:

- If you are a user with appropriate user rights, you can change the status of a migration that has not yet been processed from Submitted to Completed or Canceled and from Planned to Submitted or Canceled. If you change the status to Completed, however, the migration is assigned the status Completed with Errors since the Stat Central Agent had not yet migrated all the objects.
- You can use the Pre and Post Migration Steps tab to run steps, view logs, or update migration step status.
- To view migration approval statuses, select the Approvals tab, which shows who approved the migration and when.
- (PeopleSoft) To view the audit flags and other PeopleSoft project settings, click the Audit Flags button. This opens the Upgrade Options window in read-only format which shows whether these properties were set to be copied into the target environment during the migration or whether the settings as defined in the target environment were retained.
- Use the refresh button to update the status of migrations.
- The Log tab displays a list all the Stat-generated migration logs, including (for PeopleSoft) the PeopleSoft project copy log.

Unsupported step types in Web Client

The following pre/post step types are not supported in the Stat Web Client

- Run DMS
- Cobol compilations
- Run local custom command

These step types can still be added in the migration if the user wishes to. The Web Client will go as far as to include them as one of the steps in your migration, but they can only be run from the Windows Client.

Migration Window

The migration pane allows users to view the specifics of their migration. Double clicking any migration item in the terminal popup opens the migration pane. On the Migration Initiation page, there is a button for the migration console.

A migration tab will appear when we double click on any migration from the migration console. In the migration details pane, users may view their objects, logs, and Pre/Post steps. The list of approvals required for their move is also visible to them.

In Migration Console there are two buttons:

- Details – web client shows the details of the migration objects.
- Refresh – used to refresh the data of migration Console.

Upon selecting the Details button, the subsequent screen will display all pertinent information regarding the migrated object.

9

Process Requests

The Process Request tab displays information regarding all the object management requests submitted to the Oracle Agent, including:

- Migrate Object
- Archive Object
- Apply Patch
- Fetch Object List
- Fetch Version for Lock
- Maintenance Step
- Merge patch
- Patch Backout
- Patch Impact
- Patch Prerequisite
- Patch Cycle

The **Process Request** tab in the CSR window is CSR-specific, meaning that it only displays information concerning process requests for patches and objects associated with the current CSR.

The **Process Request** tab in the CSR enables you to see the details and logs of the event. Features which are relevant to Patch Requests like Details, Reschedule, Impacted Objects, Approval List are not added in the Stat Web Client.

Access to this tab is controlled by a user class right.

NOTE: In the Process Request tab, the Create Date field displays when the process request was originally created and the Created By field displays the ID of the user who made the request. Once the request is processed by the agent, the Update Date and Update By fields display the time it was processed and the default value, “SYSTEM”.

10

CSR History

Viewing CSR change history

As a CSR moves from one stage to another during its life cycle, many of its values are changed and updated. The **History** window maintains a record of these changes, allowing you to determine which values were changed, when, and by whom.

The **History** window records:

- Changes to the values in the general information fields of a CSR.
- Changes to the information displayed in the **Description** and **Resolution** fields. To view changes to the contents of the **Description** and **Resolution** fields, select the **History** row. Details of the changes will be displayed on the bottom of the window.
- The addition and deletion of attachments.
- Whenever objects associated with the CSR (if any) are added, locked, unlocked, reserved, or removed. To view detailed information, click a record labeled **Object Activity.** This information will be displayed on the bottom of the window. For each activity, the window displays the type of activity, the object name and type, the environment the object is located in, and the developer who initiated the action.

11

CSR Migration Path

About CSR Migration Path

Technical users with proper rights can create or modify the CSR Migration Path. The user may enter Migration, Default Developer, and VCM Repository from the lists. Once the user clicks **Update**, the Migration Path graph will be displayed on the screen. On the lower part of the screen, a list of recent migrations is displayed. The user may filter the list of recent migrations by clicking on an Environment drum.

The Export button can be used to generate a PDF report with the Migration Path information, migration graph, and a list of recent migrations.

12

Job Monitor

In the **Job Monitor** page of Stat® Web, you can perform basic administrative tasks, such as manually running jobs and configuring the Stat Central Agent to skip scheduled jobs. Access to the Job Monitor page is controlled by user class rights.

Topics:

Opening the Job Monitor

To open the Job Monitor:

1 Click **Job Monitor** in the user account drop-down menu.

The Job Monitor has three tabs that display information about jobs.

Table 1. Job Monitor tabs

Tab	Description
Schedule	Shows all the jobs scheduled for the current 24 hour period that have yet to be processed. See Viewing job schedules.
Jobs	Displays a list of all the jobs that have been defined for the Stat Central Agent. See Running jobs.
Logs	Displays a list of error logs generated by Stat Central Agent for the current day.

Viewing job schedules

The **Schedule** tab shows all the jobs scheduled for the current 24 hour period that have yet to be processed. Because jobs can be scheduled to run at particular hour and minute intervals during the day, any jobs that already have been processed are not shown. Also, whenever you refresh the web page, jobs that were scheduled to be processed since the last time you refreshed are removed from view.

To view job schedules:

1 Click **Job Monitor** in the user account drop-down menu.

2 Open the **Schedule** tab.

The job schedule is defined in the Jobs Maintenance table located in the Stat Windows client, but from here you can configure the Stat Central Agent to skip selected jobs. If you do not want the Stat Central Agent to process any of the jobs that it is scheduled to perform, select the job(s) and click **Skip Selected**. An icon appears next to the job indicating that it will be skipped.

Running jobs

The **Jobs** tab displays a list of all the jobs that have been defined for the Stat® Central Agent. The Agent processes the jobs according to the schedule defined in the Jobs Maintenance table, but from here you can manually run the jobs you want.

To run selected jobs:

1. Click **Job Monitor** in the user account drop-down menu.
2. Open the **Jobs** tab.
3. Select the check box for each job that you want to run.
4. Click **Run Selected**. The Stat Central Agent processes the selected jobs and updates the Jobs tab with the latest information.

Viewing logs

Each time a serious or potentially serious error is encountered by the Stat® Central Agent, it logs the error to the database. The **Logs** tab provides you with a list of error logs generated by Stat Central Agent for the current day.

For each error log, the tab displays the date and time it was entered, as well as the service domain, ID number, class, description, and status of the job.

To view an error log:

1. Click **Job Monitor** in the user account drop-down menu.
2. Open the **Logs** tab.
3. Click on the job description to open a message box containing detailed information about the error.

Filtering and sorting jobs and logs

You can filter the information displayed in the **Job Monitor** window so that only the jobs or logs you want to view are displayed. Once you have specified filter settings, you can enable and disable the filter as needed.

You can also sort the information clicking column headings. By default, information is displayed in ascending order. When you click a column heading, the information is sorted in descending order based on the values displayed in that column. Clicking a column heading a second time sorts the information back in ascending order.

Filters can be based on service domain and job class. In the case of the **Schedule** tab, you can also base a filter on status and the date the jobs are scheduled to be processed.

To specify filter settings:

1. Click on the tab you want and then click **Show Filter Options**.

   The top portion of the window displays the filter options.
2. Do one or more of the following:

- Click in the **Service Domain**, **Job Class**, or (in the case of the **Schedule** tab) **Status** field and select the values you want to use as the basis for the filter. For example, in the **Job Class** field, select **RptPrint** if you only want to view Print Report jobs.
- In the case of the **Schedule** tab, click the calendar icon, and in the **Calendar** box, select the date of the job schedule you want to view. You can only select the current and future dates. Note that when you view jobs scheduled for a future date, the skip jobs functionality is disabled.
- In the case of the **Logs** tab, specify a start date, an end date, or both. For example, if you only want to view logs that were generated after April 1, 2004, activate the **From** field and enter **04/01/2004,** or use the **Calendar** box and select the date. Logs generated before that date will be filtered from view.

3 Optionally, click **Enable Filter Options** to filter the information in the tab page with the settings you just specified.

4 Optionally, click **Hide Filter Options** to remove the filter options from view.

Showing job and log details

To view more information about a job or log, click the link in the **Job Description** column. In the **Schedule** and **Jobs** tabs, this opens the **Job Details** pop-up window, which shows the owner of the job, its priority, and additional parameters. In the **Logs** tab, this opens the **Log Details** pop-up window, which shows the individual entries for that log.

- To view the details for all the jobs or logs, click **Show Details**.
- To close a **Details** window, click the **Hide Details** link for individual jobs or logs, or click the **Hide Details** button, which closes all open **Details** windows.

The **Job Details** window displays different information about a job depending on the tab from which it is opened. When opened from the **Jobs** tab, the **Job Details** window displays the same information about a job as it does when opened from the **Schedule** tab, however, from the **Jobs** tab, the window also shows the weekly processing schedule of the job. Job Details windows feature links that let you open the other Details windows for the same job in different tabs.

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Test Connect

In the **Test Connect** page of Stat® Web, you can validate the connections for Databases, File Servers, E-Mail servers, and 3rd Party Version Control tools.

To test connections in Stat Web:

1. Click **Test Connect** in the user account drop-down menu. This opens the **Stat Test Connect** window.
2. Open the tab page corresponding to the type of connection you want to test.
3. Select each item you want to test.
4. Click **Test Selected**.

   Stat Web attempts to establish a connection to the selected items. For each item, the **Status** column displays **OK** if the connection is successful, and if unsuccessful, it displays an error message explaining the reason why, the **Status** column displays an error message stating the cause of the failure.

NOTE: When testing environment connections, Stat Web attempts to connect using the Host, Port, Service Name, or TNS Entry values specified in the Stat maintenance tables for each particular environment. If there is no TNS Entry value specified for an environment, it uses the Host/Port/Service Name values. If a TNS Entry value is specified, it uses that value and disregards the others.

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Reports

Stat® Web users can view reports on demand, meaning they can be viewed by Stat Web account holders at any time, not according to the time the reports are scheduled in the Stat Windows client to be emailed, exported, or printed. Reports generated through Stat Web are displayed as PDF files in the browser window or as Excel® files.

To view a report in Stat Web, the report must have available criteria that was previously defined and saved in the Stat Windows client.

Running reports

To run reports in Stat Web:

1. Click **Reports** in the user account drop-down menu to open the Stat® Web Report Viewer.

   To run reports through Stat Web, the report criteria must have already been defined in the Stat Windows Client.

2. Select the category of the report.
3. Select the report you want to run.
4. Select the report criteria.

   Options include both system criteria or personal criteria. After you make your selection, the Stat Web Report Viewer shows the criteria values.

5. Specify if you want to include a cover page with the report.

   NOTE: The cover page option is not enabled for Excel reports.

6. Click **Generate**.

   Stat Web generates the report and, depending on the type of report. displays it either as a PDF or an Excel file.

About us

We are more than just a name

We are on a quest to make your information technology work harder for you. That is why we build community-driven software solutions that help you spend less time on IT administration and more time on business innovation. We help you modernize your data center, get you to the cloud quicker and provide the expertise, security and accessibility you need to grow your data-driven business. Combined with Quest's invitation to the global community to be a part of its innovation, and our firm commitment to ensuring customer satisfaction, we continue to deliver solutions that have a real impact on our customers today and leave a legacy we are proud of. We are challenging the status quo by transforming into a new software company. And as your partner, we work tirelessly to make sure your information technology is designed for you and by you. This is our mission, and we are in this together. Welcome to a new Quest. You are invited to Join the Innovation™.

Our brand, our vision. Together.

Our logo reflects our story: innovation, community and support. An important part of this story begins with the letter Q. It is a perfect circle, representing our commitment to technological precision and strength. The space in the Q itself symbolizes our need to add the missing piece—you—to the community, to the new Quest.

Contacting Quest

For sales or other inquiries, visit https://www.quest.com/contact.

Technical support resources

Technical support is available to Quest customers with a valid maintenance contract and customers who have trial versions. You can access the Quest Support Portal at https://support.quest.com.

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal enables you to:

- Submit and manage a Service Request.
- View Knowledge Base articles.
- Sign up for product notifications.
- Download software and technical documentation.
- View how-to-videos.
- Engage in community discussions.
- Chat with support engineers online.
- View services to assist you with your product.

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