Arbutus Results Manager

USER GUIDE

ARBUTUS

Drive Your Analytics

Copyright

This manual may contain dated information. Use of these materials is based on the understanding that this manual may not contain all the information, or the most current information, relevant to an intended application. Support and update services are available from Arbutus, by separate written agreement.

Published September 2020 by:

Arbutus Software Inc.

270 - 6450 Roberts Street

Burnaby, British Columbia

Canada V5G 4E1

Phone: +1-604-437-7873

Fax: +1-604-437-7872

E-mail: Info@ArbutusSoftware.com

Web: www.ArbutusSoftware.com

About this Guide

This guide is provided to licensed users of Arbutus Results Manager to provide quick instructions on connecting and using it.

For more information about our products and services, visit our web site at:

www.ArbutusSoftware.com

Need Help?

Contacting Us

If you have suggestions for improvements or if you can not find a solution to a problem, you can contact technical support for assistance. Please include:

- Your Arbutus Analyzer serial number.
- A description of what you were doing when the problem occurred.
- The error message, if any enountered.

Support Center

Global Help Desk

- Phone: +1-604-437-7873 or +1-877-333-6336 ext. 333
- Fax: +1-604-437-7872
- E-mail: support@ArbutusSoftware.com

Or write to us at:

Arbutus Software Inc.

270 - 6450 Roberts Street

Burnaby, BC

Canada V5G 4E1

Contents

Chapter 1 Arbutus Results Manager

This section describes connecting, configuring and working with the Arbutus Results Manager (RM).

Connecting to Arbutus Results Manager

Please contact your Results Manager (RM) administrator to obtain the web address for your Arbutus Results Manager server login.

This will normally be in the form:

`www.yourdomain.com,`

or in the form:

`www.yourdomain.com:xxxx`

(where xxxx is the port number on the server).

When you enter this web address you will automatically be redirected to the Results Manager server Login page.

Once you are on the Login page you will be asked to login to the Results Manager. You do this using your standard Active Directory user ID and password. If your login information is not correct you will be presented with an error message. You will not be able to proceed to a Results Manager session without a correct login.

Note:The Results Manager (RM) uses the users actual Windows Login authentication (i.e. Active directory, local accounts, etc.) for the Windows server hosting the Arbutus Windows Serverand the Results Manager (RM).

Configuration

By default, after logging in to the RM system, all users (administrators and non-administrators) will view the list of Activities assigned to them(Mine). All users will have access to the Activities menu option, however, only the administrators will be able to re-assign activities in the list and to filter for All | Active user activities.

Users can log out of the RM system by choosing the Logout option using the pull down menu to the right of their name.

All users can perform the following actions on their activity lists:

- sort the activities in their lists
- click a column header in the activity list and choose to sort the column in ascending or descending order
- re-size column widths

- organize (move) columns
- add or remove columns - added columns appear on the far right but can be moved after they are added
- save the changes to the activities list for a user, the user must click the Save Configuration option by clicking the pull down menu beside their name. If not saved, changes are only in affect for the current session.
- restore the activity list to its default presentation by clicking the Clear Configuration option by clicking the pull down menu beside their name
- choose the number of rows to display (10 being the default) using the Items Per Page text box on the bottom left of the current activity window. The specified number of rows to display will persist for the current session for all lists or until it is changed to another value. If the total number of rows in the activity list is greater than the number of rows the user has chosen to display, the user can navigate through the entire list using the page selection shown on the bottom left of the Activity list.
- choose to refresh the contents of the Activities list at any time to show the latest assigned Activity content.

Administrators are responsible for establishing users, groups and processes. Only administrators can re-assign activities.

Results

By navigating to the Results navigation bar menu option, administrators and non-administrative users can review and create results.

Non-administrative users will only be able to see results assigned to them. And if they click on the result, they will see the Result Activity Log but will only be able to view previous activities that were not assigned to them. They can only close an open activity if it is available and has been assigned to them.

Users have the ability to create results via the RM system web interface, although in most cases, results will enter the RM system from Analyzer procedures (most likely via scheduled jobs on the Arbutus Windows Server) that invoke the Results command.

Currently there is no way to edit or delete existing results. When manually adding a new result you are prompted to enter the following result information:

- Type - is single character specific to the business departments or business processes.
- Description - explains what the cause of the result was and should provide sufficient detail
- Reference - is a reference number that has meaning in the workflow or business domain, it may link back to the original cause of the result, etc.

- Number reference - is similar in nature to reference but is limited to a numerical value (i.e. ranking, with severity from 0 to n)
- Associate the result by selecting the appropriate workflow from the list of available workflows
- Assign a priority value (level of importance)

Once the result is created, a corresponding activity will be created and allocated appropriately based on the first state owner and the allocation method for the associated workflow.

The command icon on the results list will redirect you back to the result activity log with a list of all the activities that were created from that thread (essentially a history of the result from start to close or its current state).

Activities

By navigating to the Activities navigation bar menu option, administrators and non-administrative users can review and address existing activities.

The Activity dialog lists a summary of read only fields that describe the activity and its current state and should provide a description of why this activity must be dealt with.

From here a user can click the green icon beside an activity to launch the Activity Details dialog to view activity details , add attachments and notes, and get instructions on the description of the current state of the activity.

Additionally there are 3 fields that a user can add values to:

- Hours
- Cost
- Result amount

Closing Activities

When a user is ready to close an Activity, they will click the green icon beside the activity in the Activity dialog. This will launch the Activity Details dialog.

At the bottom of the Activity Details dialog, valid results for advancing (closing) the activity in the workflow are displayed as orange buttons. The user must choose the correct result by clicking the orange button for the desired result.

Note:Available results will correlate with established allowable results for this state of the specific workflow. This means the number and type of allowable results will vary by workflow and state.

Once a result is chosen by the user, the activity will be removed from the users activity list and will be moved to the next stage in the workflow.

Dashboard

The Dashboard is available to all RM users who are set up as administrators.

From the Dashboard screen, the various graphs for the Dashboard can be accessed for selection or de-selection by clicking on the Customize Dashboard button in the top right.

Graphs can be repositioned by clicking and holding with your mouse on a graph and dragging it to the preferred location.

To access the preferences for each graph, click on the 3 dot icon in the top right.

Certain graphs in the dashboard support drill down functionality. Clicking on a section of the graph will generate a new graph based on the selected area. If a graph does not support drill down, this option will be grayed out when selecting graph preferences in the top right.