

**RAMCO AVIATION SOLUTION
VERSION 5.8**

USER GUIDE

APPROVE ANYWHERE

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ABOUT THIS MANUAL

This document is the software User Manual (SUM) for the **ApproveAnywhere**, a mobile application that has been developed by **Ramco Systems**, to equip senior management personnel who are responsible for approval of various documents; to reduce dependencies on desktop application and ensure uninterrupted processing for the Authorizers.

THIS MANUAL WILL SUPPORT

- **System/Project Administrator** in understanding the steps to download and Install the ApproveAnywhere application
- **Authorizers** for recording approvals assigned to them.
- **Buyers** or **Requesters** to track documents, like for example can determine with whom the document is pending

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APPLICATION USAGE OVERVIEW

The **ApproveAnywhere** application aims to reduce dependencies on desktop application and ensure uninterrupted processing for the Authorizers. Also with this application the user will be able to manage invoice authorization using an iPhone

The **ApproveAnywhere** application provides the capability to approve or return the following documents:

Purchase Orders (*Note that in case of Purchase Orders Short close capability is also available*)

Repair Orders

Loan Orders

Supplier Order Based Invoice

Delivery Charges Invoice

Supplier Direct Invoice

Supplier Debit Credit Notes

Stock Correction (*Note that Return of Stock Corrections is not supported*)



*Note: The **ApproveAnywhere** application is well integrated with Ramco desktop application and therefore all the work done in this application can also be viewed using the desktop application and vice versa.*

APPLICATION CONFIGURATION

For seamless working of the application, the following configuration for **ApproveAnywhere** application needs to be done.

General settings

Defined by the IT team of the organization, the general settings are available in the iPhone settings screen. These settings include the following:

- Server Configuration
- Default User/Role/Organization Unit Configuration



Note: You will be able to use the ApproveAnywhere application in the mobile device only after configuring the above settings

Application Settings

This screen facilitates the User to modify the following:

- Context Role/Organizational Unit
- Default Login UI for the Login OU/Role

DEVICE REQUIREMENTS

ApproveAnywhere app requires the following recommended requirements for optimal user experience:

- iPhone 6,iPad Air / iPad Mini 2 or later with Apple A7 or later chipset
- iOSs 9 or later
- Constant network connectivity via Wi-Fi or 3G/4G*
- 100 MB or more free space



Note: 3G/4G connectivity requires an iPad capable of Mobile Data connectivity. Your carrier might charge you extra for data roaming. When available, always prefer Wi-Fi connectivity over Mobile Data.

INSTALLATION SETTINGS

ApproveAnywhere app will be available to install from the enterprise store and not from the Apple App store. To access the enterprise store, contact your IT Admin team to get the URL of the host server. Now follow the below steps on the iPhone.

1. Ensure the device is connected to Wi-Fi or Mobile Data.
2. Open safari.
3. Type in the URL provided in the Address bar and click Go.
4. In the Enterprise store listing, select the 'ApproveAnywhere' app.
5. Click 'Install' on the popup to allow installation on the device.
6. Quit safari.
7. Wait for the app installation to complete.
8. Tap on the App icon.
9. If Untrusted App Developer popup shows up, click on 'Trust'.
10. Quit the App.

SECURITY

Access to individual UIs

Control access to individual UIs by providing role rights mapping in the Admin page.
Deployment Process → Implementation Process → Map Enterprise Roles.

Access to individual UIs

Control access to perform an action by providing role rights mapping in the Admin page
at:

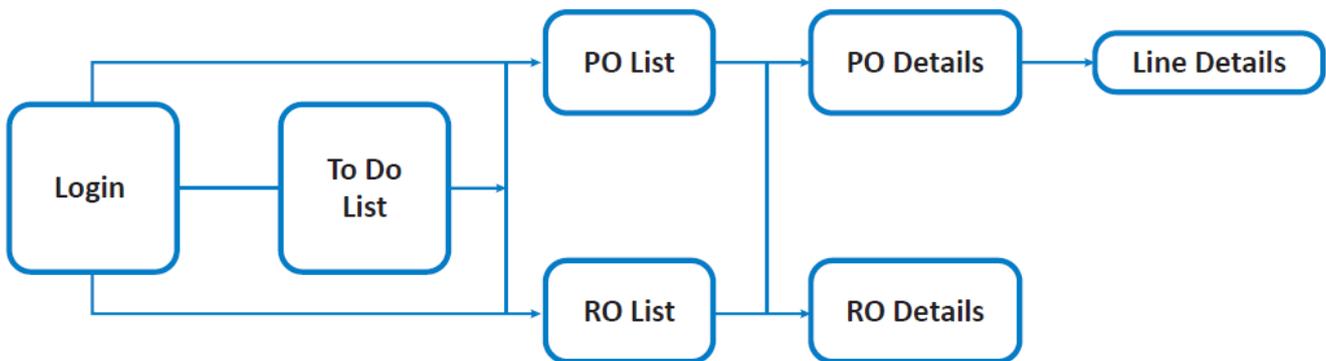
Deployment Process → Implementation Process → Maintain Task Privileges



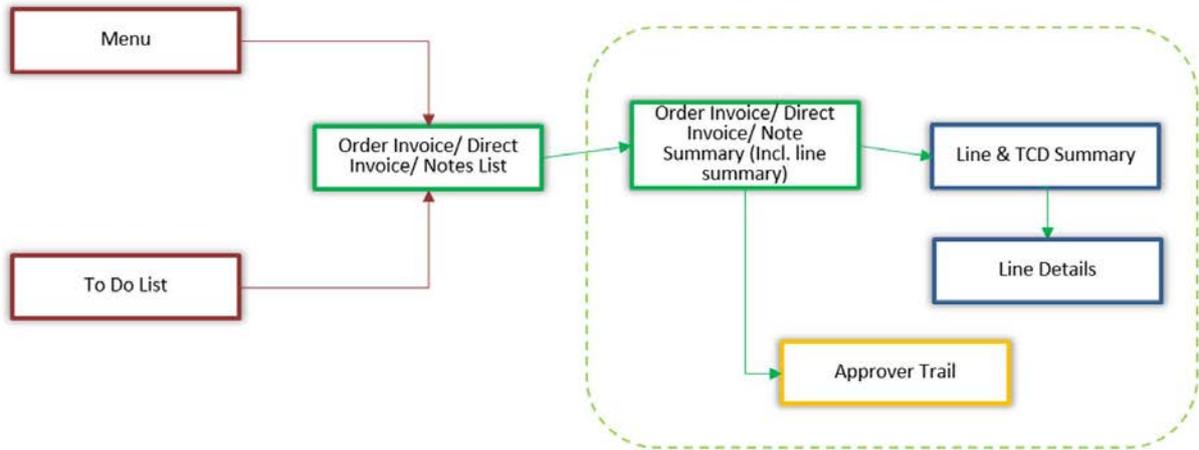
Note: Contact your IT team to get the activity mapped for a particular role.

NAVIGATION

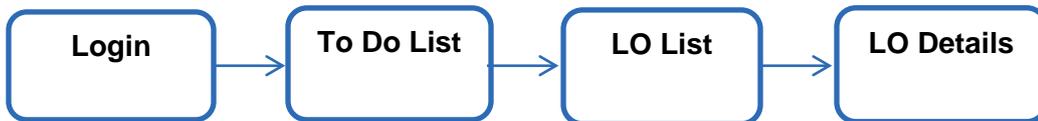
PO / RO



INVOICE



LOAN ORDER



STOCK CORRECTION



CONVENTIONS

	Hamburger Menu		Barcode
	Screen Capture		Favorites
	Approval pending with user		Settings
	Surplus purchase		Replenishment Purchases
	Warranty Repair		Manual Quotation in RO
	Demand Purchases		Previously Returned Doc
	Automatic Quotation in RO		Partially authorized doc.
	Doc. not yet authorized		Doc. not yet due for authorization
	Warranty Purchase		

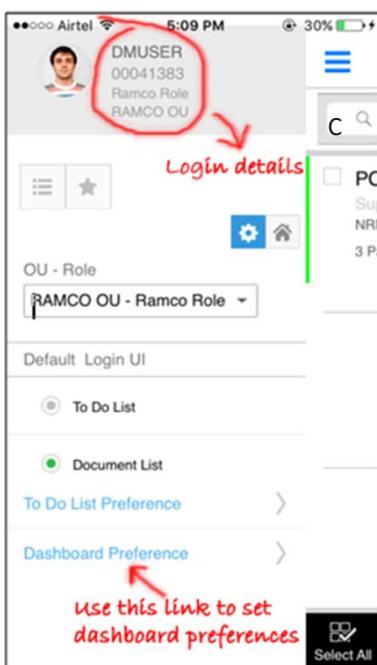
TROUBLESHOOT

SYMPTOMS	TROUBLESHOOT
App is not installing	<ol style="list-style-type: none">1. Check the internet connectivity.2. Check if there is at least 100MB of free space.3. Check if you iOS version is the latest.4. Check all the pages for the app icon.
App is not opening	<ol style="list-style-type: none">1. Check the internet connectivity.2. Trust the developer 'Ramco systems' in settings → General → Profile.3. Reinstall the app.
Cannot Login	<ol style="list-style-type: none">1. Check the internet connectivity.2. Check correct configuration in the settings under Approve Anywhere.3. Check the validity of the username and password entered.4. Close the app and try again.
App is frozen	<ol style="list-style-type: none">1. Check the internet connectivity.2. Close the app and try again.3. Restart the iPad and try again.
server not available error	<ol style="list-style-type: none">1. Check the internet connectivity.2. Contact your system administrator.

USE OF FEATURES

Purchase order/Repair Order

Application Settings



You can use the following links to proceed with some general settings: In this screen you can modify the following:

Context Role/organizational Unit

To do list link

- You can define the categories to be listed in the To Do List screen.
- You can define filter categories

Dashboard Preferences link

- You can define settings for the dashboard

General Setting

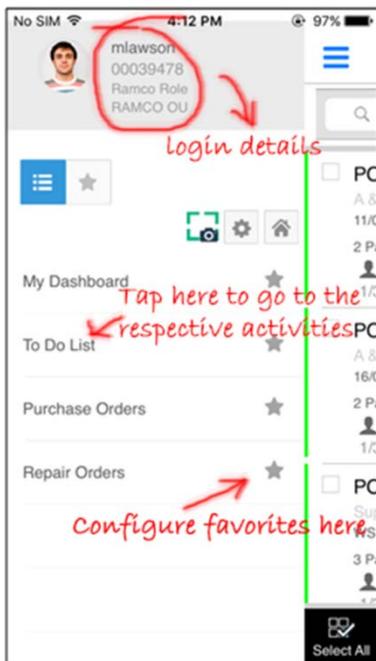


In this screen you can configure the server URL



Switch on the **Enable Debug** button to take a log of errors

Menu Options

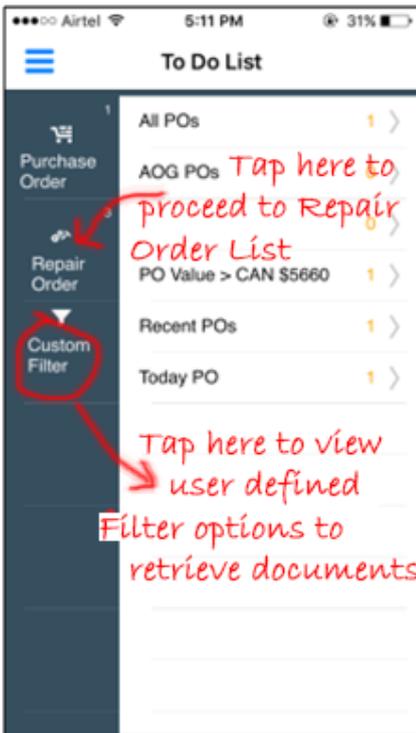


In this screen you can view the login details. You have the provision to configure application settings for the Login User – OU- Role



Note that only those activities for which the user has the access rights to perform in this mobile application will be listed here.

To DO List



In this screen Purchase Orders and Repair Orders that are pending to be Authorized by the login user are categorized into different pre-defined categories. Eg.of PO categories:

All POs – All the PO documents

AOG POs – POs with the priority as AOG

POs Due < X Days – POs with Earliest Due date less than the days configured in the To Do List Preference screen

PO Value > X <Base Currency> - PO with total value greater than the value configured in the To Do List Preference screen

Recent POs – POs with last modified date in the recent days, with the number of days configured in the To Do List Preference screen

Today's PO – POs that are created today



Note that documents pending for approval can be verified in the filter categories defined by the user in the **Custom Filters** to be acted upon.

To Do List – Purchase Orders



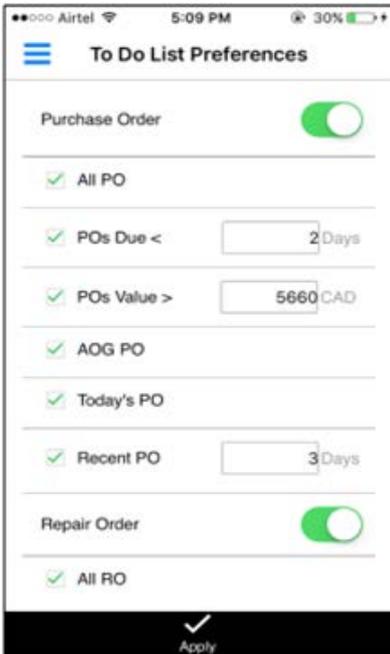
In this screen you can select the PO to **Authorize** or **Return**

Tap the **Filter** option to choose the basis on which you wish to retrieve the documents, for example based on Priority/PO Type, Buyer Group etc.



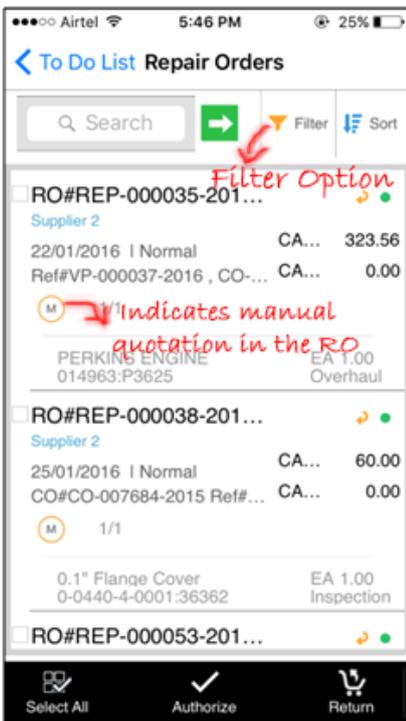
Note that you can tap on the **More** option at the bottom of the screen to perform more actions on the documents

To Do List Preferences



In this screen you can configure the filter categories that are to be visible in the **To Do List** screen

To Do List – Repair Orders

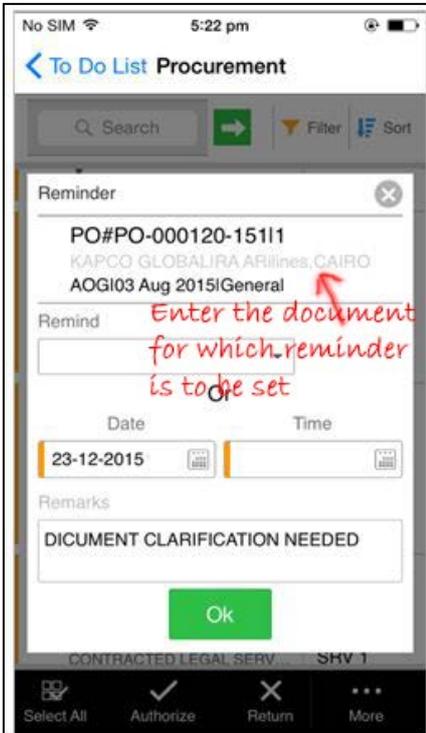


In this screen you can select the RO to **Authorize** or **Return** Tap the **Filter** option to choose the basis on which you wish to retrieve the documents



Note that you can tap on the **More** option at the bottom of the screen to perform more actions on the documents

Reminders

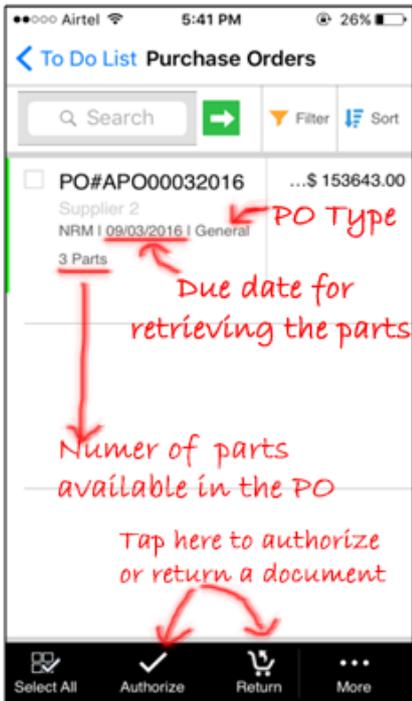


This screen enables you to set time and date to remind you to perform specific actions on the document



Note: Enter remarks pertaining to the reminder in the **Remind** field

Actionable User Interfaces – Purchase Order



The user can record the work action that has been carried out in the application after reviewing a document.

The actionable user interfaces available are:

General

Amendment History
Approver History
Part Name Plate

Repair Order

Repair Order List
Repair Order Details
Part Details

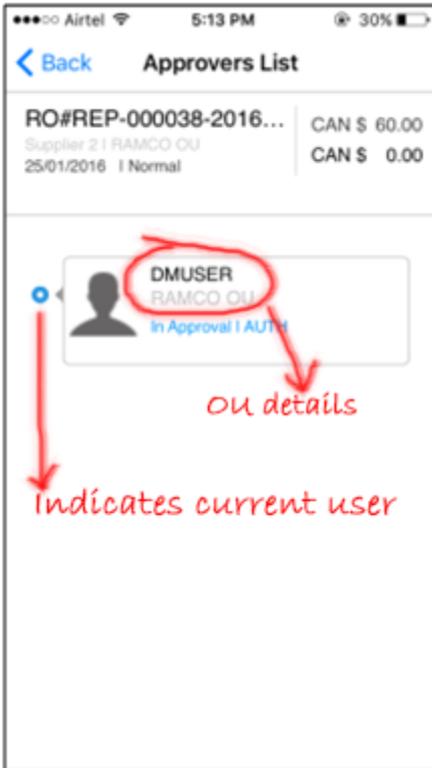
Purchase Order

Purchase Order List
Purchase Order Details



Note that in case of a single part available in the PO note, that particular Part # will be displayed

Approvers List

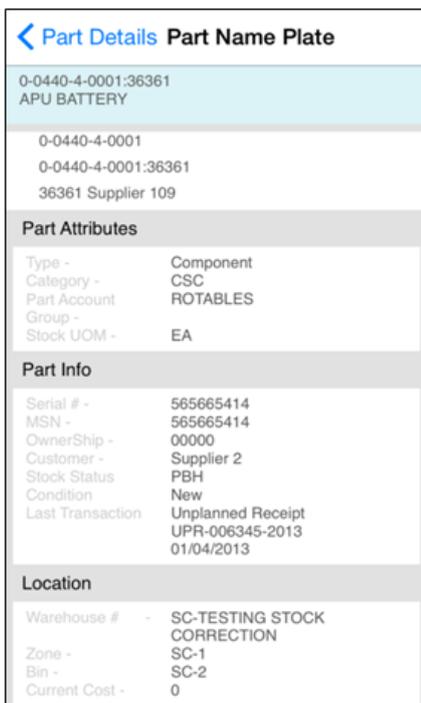


In this screen you can view the different authorizers who need to authorize the particular document.



Note that ● icon beside displayed to the left of the user details indicates already authorized user, and the ● icon indicates the next level of authorizers

Part Name Plate screen



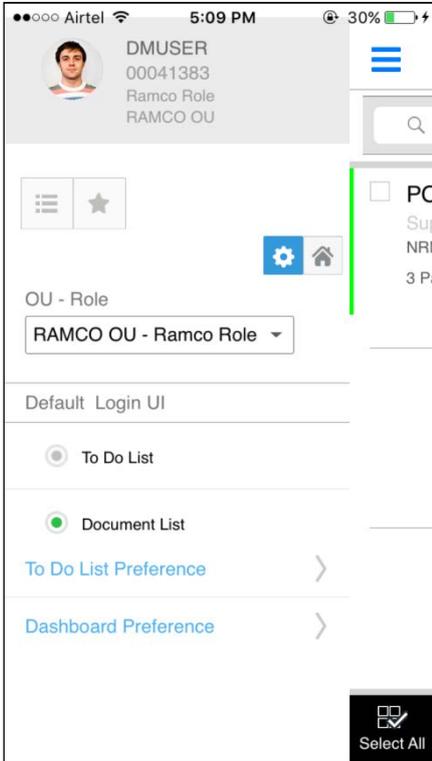
You can view the complete details of the Part-Serial number combination, the last transaction for this part



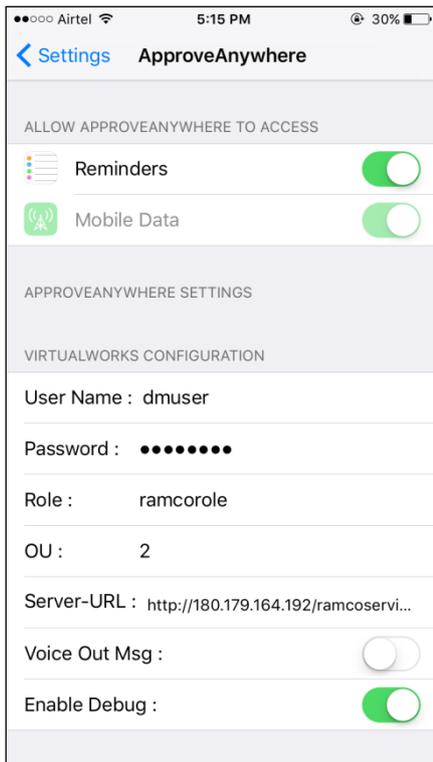
Note that in this screen you can view the last transaction for the particular part

Invoice Approval

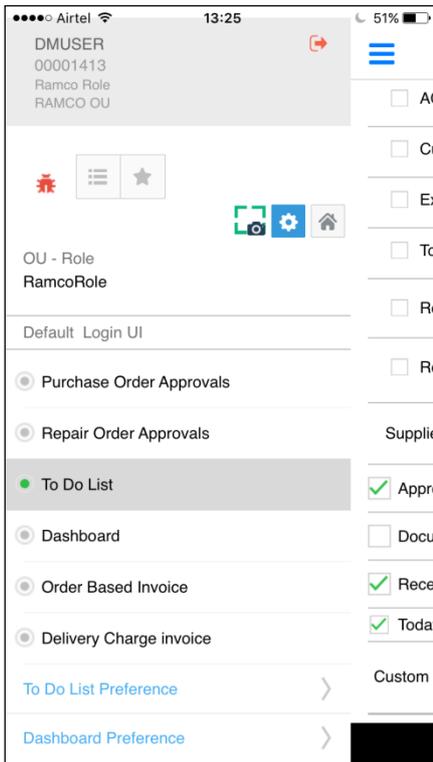
General Settings



Application Settings



Menu Options



In this screen you can view the login details. You have the provision to configure application settings for the Login User – OU- Role.

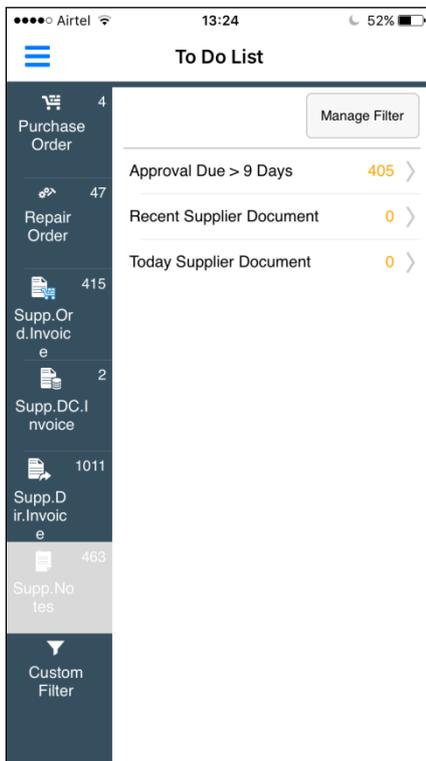
You can also configure your favourite activities and retrieve them when required.

This screen lists the various activities for which alone the user has the access rights to perform in this mobile application.



Note that the access rights definition is similar to the one available for the access control in the desktop application

To Do List

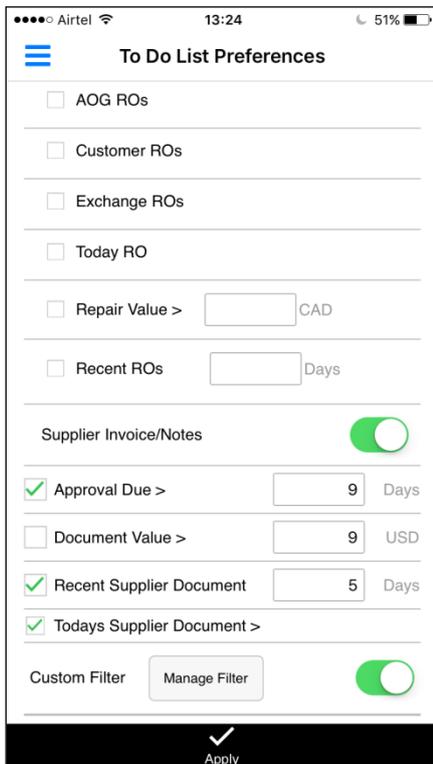


In this screen, **Custom Filters** can be defined using Supplier Name, Created by Employee #, Document Date, Due Date, Document Type and status.



*Note that any document that is pending for approval can be verified in the filter categories defined by the user in the **Custom Filters** and acted upon.*

To Do List Preference



In this screen invoices and notes that are pending to be Authorized by the login user are categorized into different pre-defined categories.

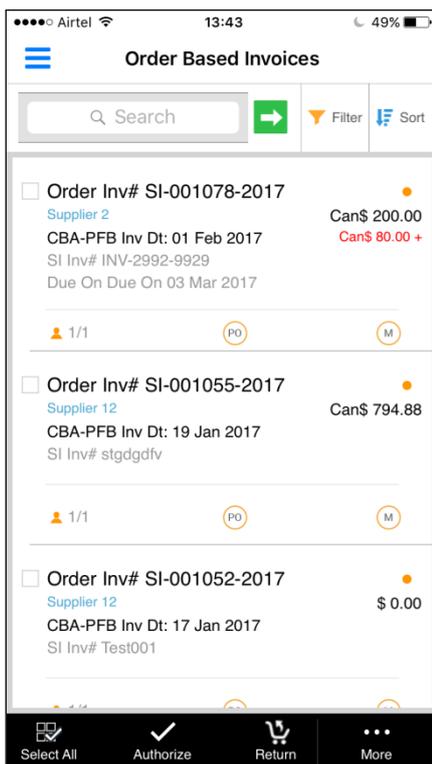
Approval Due > 'x' days: Invoices & Notes for which Approval is due for more than 'x' number of days from the last modified date

Document Value > 'Y' <Base Currency>: Invoices & Notes with total value greater than the value configured in the 'To Do List Preference' screen

Recent Supplier Documents: Documents with the last modified date in the recent days, with the number of days configured in the 'To Do List Preference' screen

Today's Supplier Document: Supplier Invoices & Notes that are created today

Invoice and Notes List

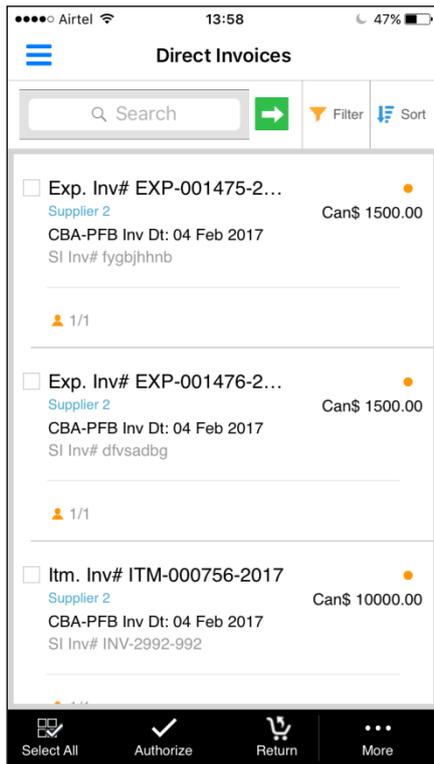


The **Invoices & Notes** screen lists all the Invoices recorded against documents (Purchase Order, Repair Order, Loan Order, Release Slip and Exchange Purchase Order, Delivery Charges Invoice, Expense Invoice, Item Invoice, Debit/Credit Note) that are pending authorization.

You can view all the key information of an Invoices & Notes in this screen to enable you to carry out the requested action then and there.

Details Displayed

Invoice/ Note #	Due date
Supplier Name	Invoice Value
Finance Book	Variance Value (if applicable)
Invoice Date	Order Type [PO/EPO/RO/LO] (if applicable)
Supplier Invoice #	Status [Matched (M), Auto-Match Failed (MF), Fresh (F)]



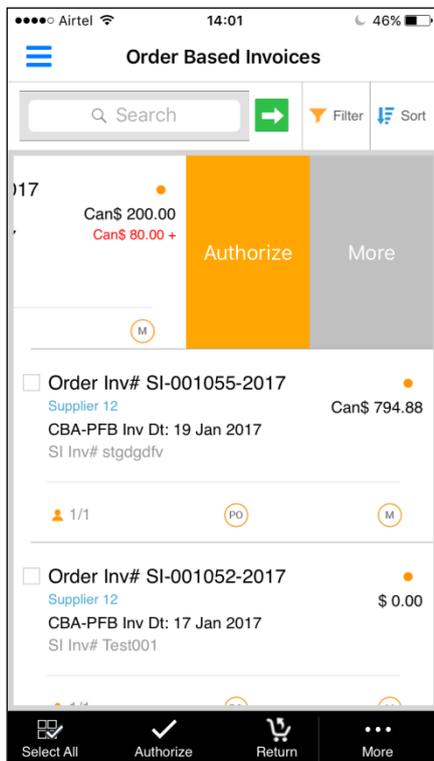
Swipe Actions

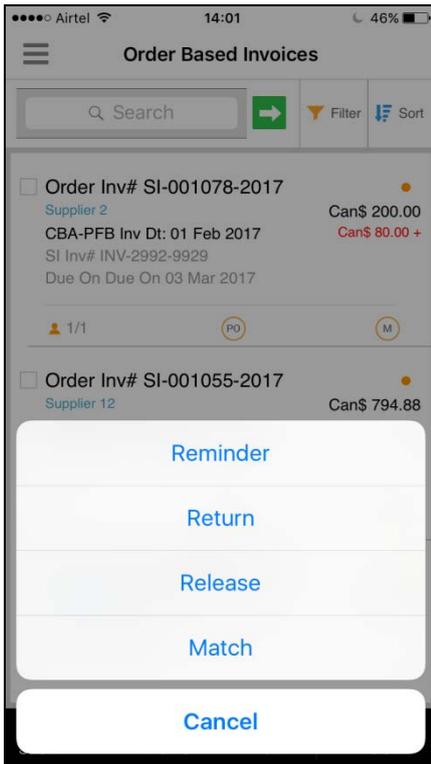
- Authorize
- Match
- Return
- Release
- Reminder

Bottom Bar Actions

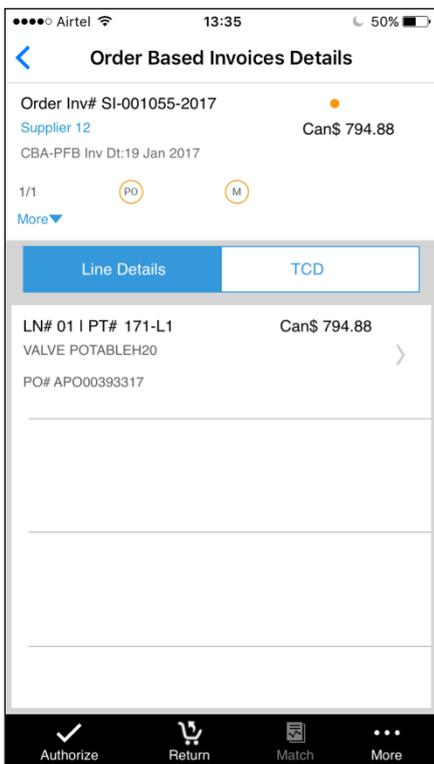
- Authorize
- Return
- Match
- Reminder
- Release

Invoice and Notes with swipe action





Invoice and Notes details



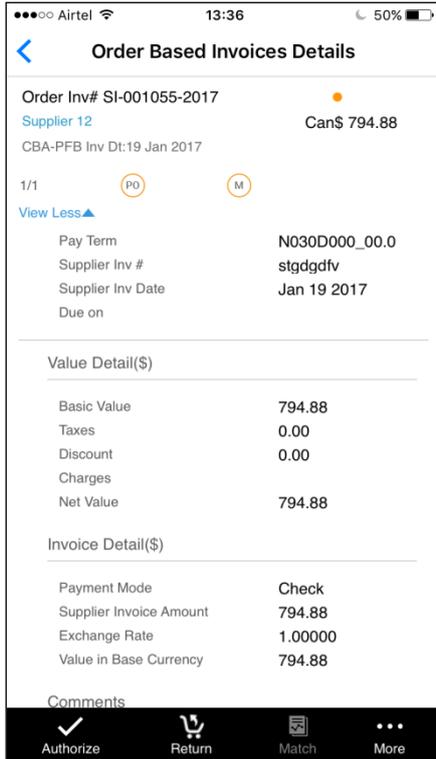
This screen provides the details of a selected Invoice/ Note document.

You can view line level details in the **Line Details** tab and **TCD** details in the TCD tab



*Note: Tap the **More** action button at the bottom of the screen to view additional header information of the Invoice/ Note document.*

Invoice and Notes - Additional Information



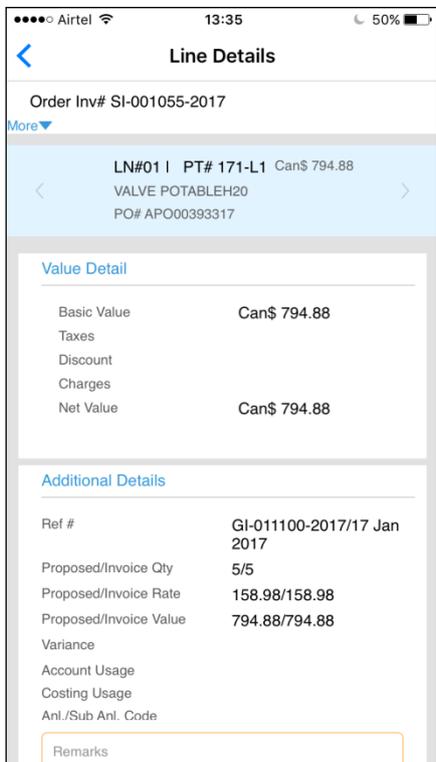
The additional information displayed includes the following:

- Pay Term
- Supplier Document #
- Document Date
- Due Date
- Document value Details
- Other Document Details
- Comments etc



Note: After reviewing the details of the Invoice/ Notes, you can Authorize /Return/Release the document from this screen itself.

Line Details



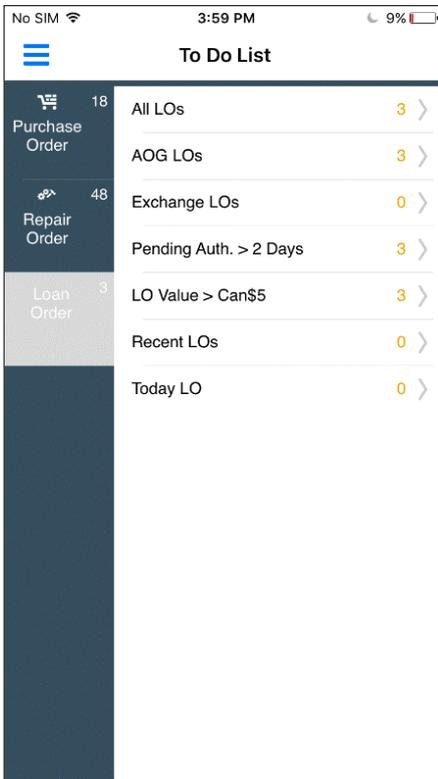
This screen enables the user to view additional information of the line in the Invoice/ Note.

- The information displayed includes additional Line Level details such as follows:
- Reference document # (e.g. Goods Inward #)
 - Quantity, Rate
 - Amount
 - Variance
 - Accounting Usage
 - Costing Usage
 - Analysis/ Sub Analysis etc.

Loan Order Approval

The **Approve Anywhere** application provides the capability to approve Loan Order documents.

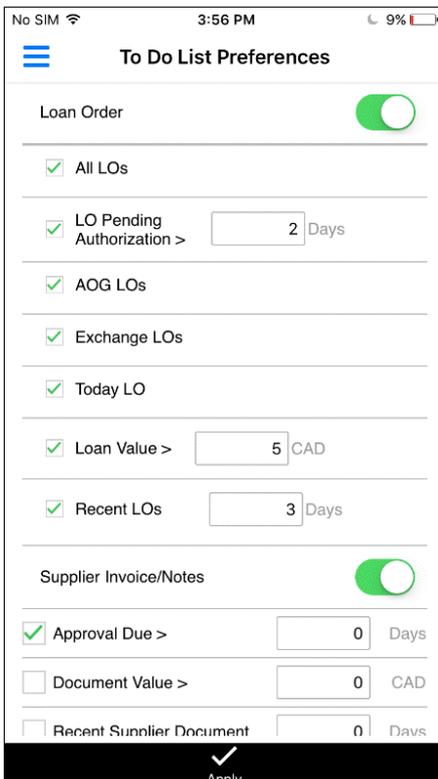
To Do List



To Do List screen categorizes the Loan Order to be authorized by the login user into different pre-defined categories:

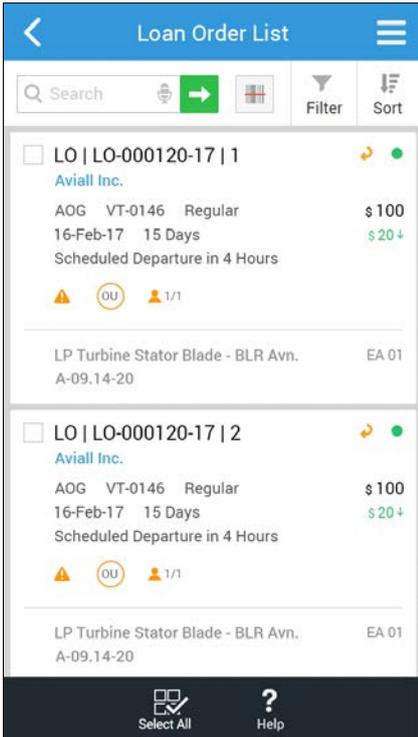
- a. All LOs – All the Loan Order documents
- b. AOG LOs – Loan Orders with priority as ‘AOG’
- c. Exchange LOs – Loan Orders of type ‘Exchange’
- d. LO Value > “X” <Base Currency> - Loan Orders with total value greater than the value configured in the ‘**To Do List Preference**’ screen
- e. Pending Auth. > “X” Days - Loan orders that are pending for authorization for a period greater than the days configured in the ‘**To Do List Preference**’ screen
- f. Recent LOs – Loan Orders with last modified date in the recent days, with the number of days configured in the ‘**To Do List Preference**’ screen
- h. Today’s LO – Loan Orders that are created today

To Do List Preferences



To Do List Preferences is the screen in which user can configure the filter categories that are to be visible in the **To Do List** screen. Custom Filters can be defined using Supplier #, Created by Employee #, Status, Loan Order Date, Priority and Loan Order Type.

Loan Order List



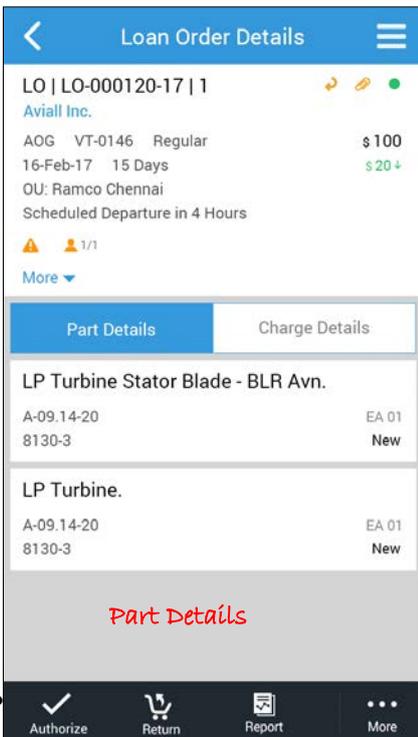
Loan Order List screen lists all the Loan Orders pending for approval by the login user. All the key information of a Loan Order is shown in this screen so that the user can carry out the requested action then and there.

Details Displayed: Document Type / Loan Order # / Amendment #, Supplier Name, Priority / Aircraft Reg # / LO Type, LO Date / Loan Order Period, Remarks, Part Description, Part #, Approval Indicator / Return Indicator.

Swipe Actions: Authorize, Return, Reminder, Approvers List.

Bottom Bar Actions: Authorize, Return

Loan Order Details - Part Details



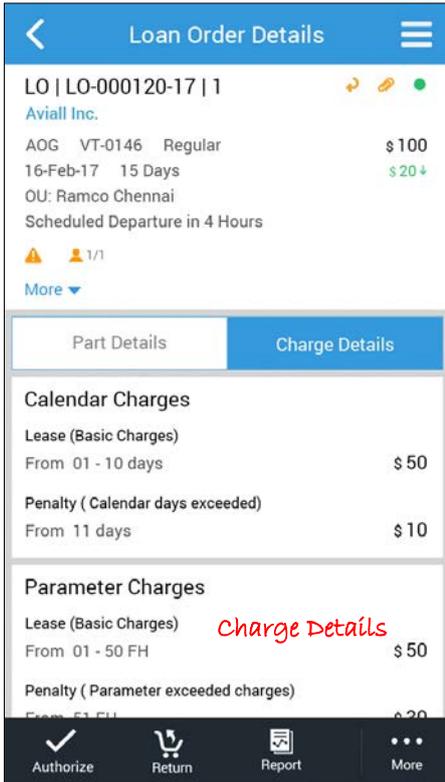
This screen provides the details of a selected Loan Order document. The information is organized into header information, Part Information and Charge Information multiline. Additional header information of the Loan Order document can be viewed by clicking 'More'.

Additional information includes A/C Reg #, Loan Charges on, Reason for Loan, TCD Applicable, Supplier # etc. After reviewing the details of the Loan Order, user can Authorize / Return the document.

The information displayed in the Part Details multiline are:

- Part Description
- Part # / UOM / Quantity
- Certificate Type / Condition

Loan Order – Charge Details



The information displayed in the Charge Details section are:

- Calendar based Lease Charges
 - Lease (Basic Charges)
 - Penalty (Calendar days exceeded)
- Parameter Charges
 - Lease (Basic Charges)
 - Penalty (Calendar days exceeded)

Approvers List



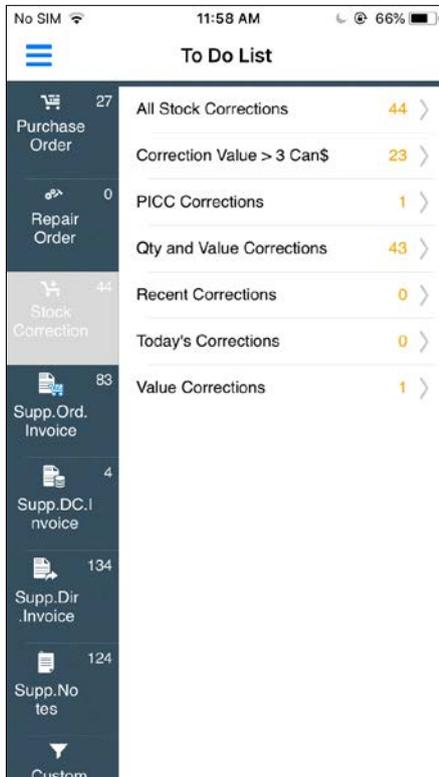
Approvers List screen lists the different authorizers who need to authorize the document. The screen will display the basic information of the document along with the approvers list. Also, the OU and authorization comments shall be displayed next to the user details.

Amendment History screen lists the key values of a document in the previous amendments. User can view the key values of the document like Document Type, Expense Type, Remarks, Number of Parts, and Value etc. If the user wants to view the entire details of a given amendment, the particular amendment can be tapped and the details screen opens for that amendment.

Stock Correction Approval

The **Approve Anywhere** application handles approval of stock correction module.

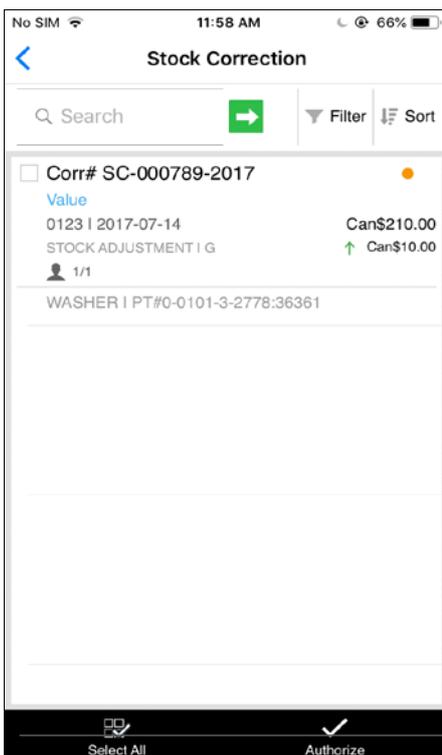
To Do List



To Do List screen categorizes the stock correction documents that are pending for approval by the login user in all the OUs mapped to him:

- a. All Stock Corrections - All Stock Corrections in 'Fresh' / 'Under Auth' status.
- b. Correction Value > 'X' <Curr> - All the Stock Corrections in 'Fresh' / 'Under Auth' status which have Correction Value which is greater than the value defined in the To Do list preference screen.
- c. Qty and Value Corrections – All the Stock Corrections in 'Fresh' / 'Under Auth' status with the Correction Type as 'Qty' or 'Qty and Value'.
- d. PICC Corrections - All the Stock Corrections in 'Fresh' / 'Under Auth status' which has Correction Basis as Physical Inventory or Cycle Count.
- e. Value Corrections - All the Stock Corrections in 'Fresh' / 'Under Auth' status with the Correction type as 'Value'.
- f. Today's Corrections - All the Stock Corrections in 'Fresh' / 'Under Auth' status with the created date as the current system date.
- h. Recent Corrections - All the Stock Corrections in 'Fresh' 'Under Auth' status with the Created Date within the recent number of days as defined in the **To Do list Preferences** screen.

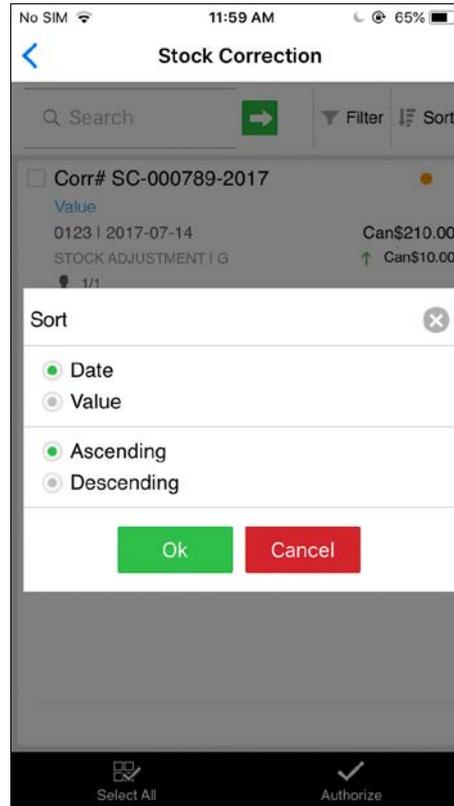
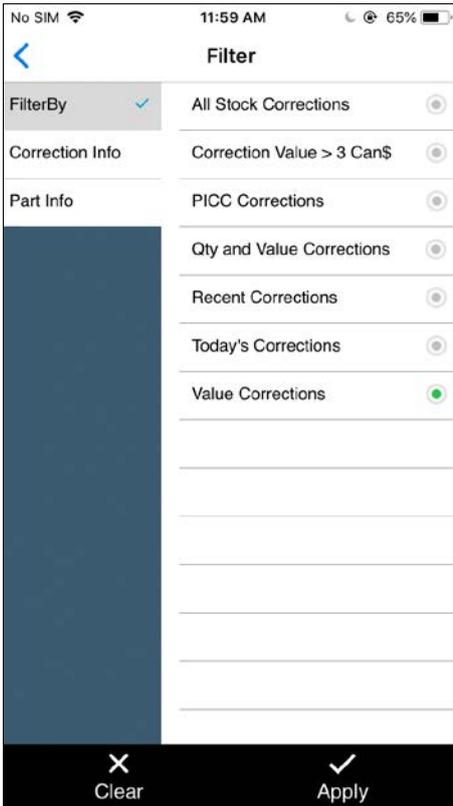
Stock Correction List



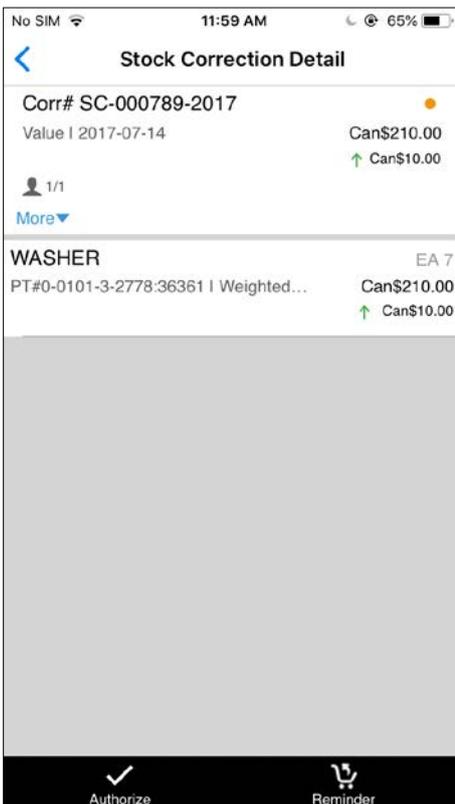
The **Stock Correction List** screen lists all the Stock Correction documents, which are in 'Fresh' or 'Under Authorization' status. User can authorize a single document or multiple stock correction documents in a single instance. The following details are displayed in various sections:

- a. Search: Search Correction Document, Go Button, Filter, Sort
- b. Details Displayed: Correction #, Correction Type, Warehouse, Correction Date, Correction Value including currency, Account Usage, Costing Usage, Correction Basis, Correction value (Amended Value), Part Description & Part #
- c. Indicators: Status Indicator, User Indicator, OU Indicator.
- d. Swipe Actions: Authorize, Reminder (More), Approval History (More)
- e. Bottom Bar Action: Select All, Authorize

Filter & Sort Functions



Stock Correction Details

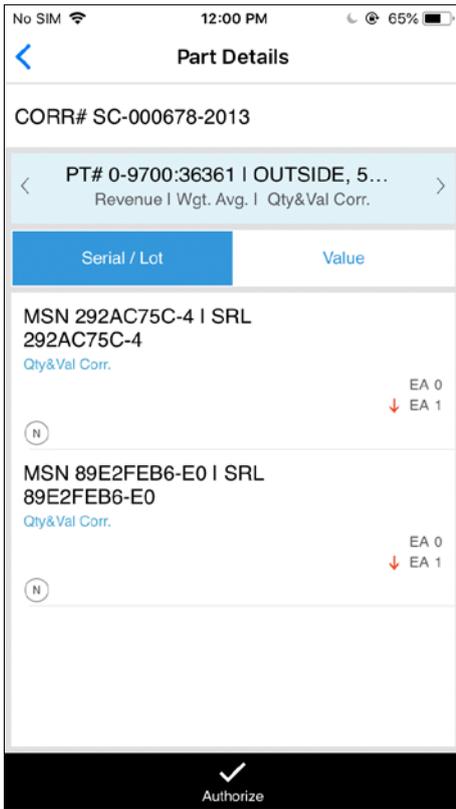


The **Stock Correction Details** screen will display the details of Stock Correction documents, which are in 'Fresh' or 'Under Authorization' status, enabling user to authorize the stock correction documents.

The information displayed are:

- a. Stock Correction Details
- b. Indicators
- c. Warehouse Details
- d. Document Details
- e. Attachment
- f. Part Details
- g. Bottom Bar Action

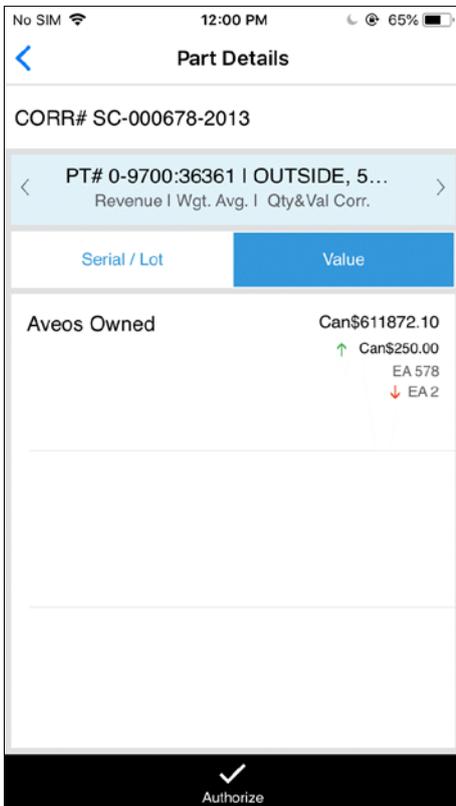
Part Details - Serial / Lot Tab



The Part Detail screen enables the user to review the serial/lot details and the value details for a part involved in the Stock Correction document. These details are displayed different tabs. The details displayed in this screen are as follows:

- a. **Stock Correction #**
- b. **Part Summary:** Part #, Part Description, Expense Type, Valuation Type, Reason for Correction.
- c. **Bottom Bar Action:** Select All, Authorize Serial / Lot tab: MSN / MLN #, SRL / LOT #, Currency Symbol, Revised Value, Correction Type, Delta Value, Trading Partner Type, Trading Partner Name, UOM, Revised Qty, Reason for Correction, Condition Indicator.

Part Details - Value Tab



- a. **Value tab:** The Value tab displays the LIFO/FIFO details or Weighted Average details based on the Valuation Method of the Part. If the Valuation method of the Part selected is Actual Cost or Standard Cost, the Value tab will not be displayed.
 - LIFO / FIFO Details: Receipt #, Currency Symbol, Revised Value, Receipt Type, Delta Value, Ref. Document #, UOM, Revised Qty, Receipt Date, Delta Qty
 - Weighted Average Details: Stock Status, Currency Symbol, Revised Value, UOM, Revised Qty, Delta Qty

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