

## RAMCOAVIATION SOLUTION VERSION 5.8 USER GUIDE CHRYSALIS

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## **ABOUT THIS MANUAL**

This manual briefly describes the basic processes and functions in Ramco Aviation Solution.

#### WHO SHOULD READ THIS MANUAL

This manual is intended for users who are managing the Aviation industry processes and are new to Ramco AviationSolution. This manual assumes that the user is familiar with the Aviation Industry nomenclatures and systems based software.

#### HOW TO USE THIS MANUAL

Ramco Aviation Solution provides extensive Online Help that contains detailed instructions on how to use the application. Users are suggested to use this manual for specific references, along with the Online Help. This manual contains enough information to help the users perform the basic tasks and points toward the Online Help for more detailed information.

#### HOW THIS MANUAL IS ORGANIZED

The User Guide is divided into 3 chapters and index. Given below is a brief run-through of what each chapter consists of.

Chapter 1 provides an overview of the Chrysalis features.

Chapter 2 focuses on the Chrysalis feature of Personalization.

Chapter 3 focuses on the Chrysalis features impacting speed and productivity of users.

Chapter 4 focuses on the Chrysalis features impacting navigation, accessibility and workflow.

The **Index** offers a quick reference to selected words used in the manual.

#### **DOCUMENT CONVENTIONS**

- The data entry has been explained taking into account the "Create" business activity. Specific references (if any) to any other business activity such as "Modify" and "View" are given as "Note" at the appropriate places.
- Boldface is used to denote commands and user interface labels.

Example: Enter Company Code and click the Get Details pushbutton.

• Italics used for references.

Example: See Figure 1.1.

The sicon is used for Notes, to convey additional information.

#### **REFERENCE DOCUMENTATION**

This User Guide is part of the documentation set that comes with Ramco Aviation Solution. The documentation is generally provided in two forms:

- The Documentation CD in Adobe® Systems' Portable Document Format (PDF).
- Context-sensitive Online Help information accessible from the application screens.

#### WHOM TO CONTACT FOR QUERIES

Please locate the nearest office for your geographical area from www.ramco.com for assistance.

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## INTRODUCTION

**Chrysalis** comprises a set of features designed to speed up navigation, accessibility, and workflow for users of Ramco Aviation solution. Developed on the premise of convenience and corroboration, Chrysalis ensures that the user straightaway commences day's work with no more than a couple of mouse clicks.

Users can circumvent the conventional traversal of BPC-Component-Activity Hierarchy and straightaway launch the precise activity in the application. Users can even work alternately with multiple activities at a single point of time.

Chrysalis features enable users to achieve the following:

- User Interface Customization.
- View and act on application-generated messages with Inbox.
- Swift master data definition with Wizards.
- Concurrent access to multiple screens with **Work Areas.**
- Instant access to screens from Menu Map.
- Tag most-frequented activities to Menu Tag.
- Make crucial activities as **Favorites**.
- Easy access to WorkSpaces, Wizards.

# CHRYSALIS FEATURES I

The **Personalization** feature of Chrysalis helps users to alter UI elements in the Ramco Aviation application so as to suit specific organization parlance, processes and practices. For example, an industry standard process in various organizations could be referred to by different nomenclatures. To facilitate such conditions, personalization allows altering attributes of fields, buttons, links, tabs and sections to enhance user and process friendliness of the application.

Personalization can be carried out at two levels:

User Personalization: Individual users belonging to the organization unit can personalize user interfaces to suit and thereby speed up their work. However, this type of personalization is restricted to the user who devised the personalization.

Implementer Personalization: This kind of personalization impacts the working of an entire organization. Hence, Implementer personalization rights are granted to designated employees in the organization and changes are available to all login users spanning the organization unit.

However, both kinds of personalization bear similar look and feel and the procedures remain the same.

## **2.1 IMPLEMENTER PERSONALIZATION**

This kind of personalization impacts the application at the organization unit-level and as result all the users in the organization unit will be able to view/work with the custom-build changes.

The table below illustrates the possibilities of personalization at the organization level.

UI Elements	Visible	Editable	Rename Label	Mandatory (Yes to No)	Change Error	Assign Roles
Input Fields	ü	ü	ü	ü	ü	ü
Links	ü	ü	ü	×	×	×
Pushbuttons	ü	ü	ü	×	×	×
Sections/group boxes	ü	ü	ü	×	×	×
Tabs	ü	ü	ü	×	×	×

#### 2.1.1 TO PERSONALIZE AT ORGANIZATION-LEVEL

1. Click 🖬 at the top right of the screen. The **Save**, **Cancel** and **Clear** buttons appear at the top right of the screen. Those UI elements that you can personalize are tagged with 🗹 . *See Figure 2.1*.

★ 📄 Create Warehouse Information				← ? 🗔 🗷 🖽
		The		Save Cancel Clear
Warehouse Identification Details		The person	alization icon	
Warehouse #	Description	27	Warehouse Type 🛛 💌	
Storage Location 🔍 💌 🖻	Warehouse Category	▼ 2	Finance Book 👂	
Warehouse Group				
Copy Details From			The screen	level
			personaliza	tion
Warehouse # P Get Details	e.		buttons.	
	_			
	Tansaction	Storage Allocation		
Copy Options Zone & Bin Information	SAOCK Status	Storage Strategies		
	налстуре			
- Address Details				
				2ª
Address				8
City 12	State	2	Zip Code	e e
Country	Warehouse Incharge 👂	2	Incharge Name	e.
Warehouse Settings				
All Part Types Allowed	V M Transactions Allowed	Stock Status Alic	wed	2
Mow Backfushing	Wow Reservation / Hard All	ocation Allow Offline Usage	nco	
Warehouse Capacity Setting				
Capacity Constraint Not Applicable 🔻 🗹	Volume	ß	Volume UOM 👂	e e
Weight	Weight UOM 👂	2		
Other Details				
- Other Details				2
User Defined Datail - 1	Licer Defined Detail - 2	12		
	User Definied Detail - 2			
- Attachments				
				62
File Name 🖉 View File 🕫 🖉		The personalization icon		
	Create Warehouse Info	rmation 👩	reate Zone Information ra	62
			_	
				ß
Edit Warehouse - Stock Status / Condition Allowed 🗗	Select Transactions Allowed 🖉	Select Part	Types Allowed 🛃	Ø
Map Warehouse - User @	Edit Warehouse Tefermation -	Edit Interin	Storage Area / Associated Warehouse 🖪	
Set waterouse Process Parameters g	Corr warehouse thromadon 🕅			
				e

#### Figure 2.1 Showing Chrysalis features

#### To personalize drop-down list box/input field/checkbox

2. Place the cursor on **C** provided alongside the drop-down list box/input box/checkbox. As you hover the cursor on **C**, you can see a box appearing around the UI item. *See Figure 2.2*.

\star 📋 Create Warehouse Inf	ormation			+ ?	to K	
				Save	Cancel	Clear
Warehouse Identification Details						8
Warehouse #	Ľ	Description	Warehouse Type N 💌 🖻			
Storage Location	▼ 2	Warehouse Category 🔍 💌 🗹	Finance Book 👂		2	
Warehouse Group	▼ 2					

#### Figure 2.2 The Personalize border for drop-down list box/input box/checkbox

3. Click the 🗹 icon. The **Personalize** window opens up. *See Figure 2.3*.

Personalize	×
Visible:	🖲 Yes 🔘 No
Editable:	🖲 Yes 🔘 No
Rename Label:	Warehouse #
Mandatory:	🔘 Yes 🔘 No
Task	All Tasks
Error Message:	
Role	All Roles
A	oply Clear

Figure 2.3 The Personalize window for drop-down list box/input box/checkbox

- 4. To hide the UI item from the screen, select the **No** radio button under **Visible**. Alternately, select **Yes** to display the UI item.
- 5. To disallow modification of the UI item, select the **No** radio button under **Editable**. Alternately, select **Yes** to allow modification of the UI item.
- 6. To modify the name of the UI item, enter **Rename Label**.
- 7. To make the UI item non-mandatory, select the **No** radio button under **Mandatory**. Alternately, select **Yes** to make the UI item mandatory.
- 8. Use the **Task** drop-down to select the pushbutton task for which the UI item has been made mandatory.
- 9. Use the **Role** drop-down list box to select the role of employees who can view the customization.
- 10. Click the **Apply** pushbutton to save the personalization.

#### To personalize link/pushbutton

1. Place the cursor on d provided alongside the link/pushbutton. As you hover the cursor on d, you can see a box appearing around the UI item. *See Figure 2.4*.



★ 🗎 Create Warehouse In	formation															] ];	Ē	ţ	+ 3	2	K	::	
																			Save	C	ancel	Clea	ar
Warehouse Capacity Setting																							^
Capacity Constraint	Not Applicable 💌 🗹	0		16	Volum	e				e?			Vol	ume UOI	ЧP					ß		C.	
Other Details					leight COM 4					E.													
User Defined Detail - 1		Ľ		User De	fined Detail -	2				ß												Ľ	
Attachments																						ß	
File Name 👂	Ø																						
																						ß	
					Create V	/arehou	use Infor	rmation	C		Creat	te Zone	Inform	ation 🖉								ß	

Figure 2.4 The Personalize border for pushbutton/link

2. Click the icon. The **Personalize** window opens up. *See Figure 2.5*.

Personalize			X
Visible:	Yes	Nc Nc	
Editable:	Yes	Nc 🔘	
Rename Label:	Create	Warehouse Information	
	Apply	Clear	

Figure 2.5 The Personalize window for pushbutton/link

- 3. To hide the link/pushbutton in the screen, select the **No** radio button under **Visible**. Alternately, select **Yes** to display the UI item.
- 4. To modify the name of the UI item, enter **Rename Label**.
- 5. Click the **Apply** pushbutton to save the personalization.

#### To personalize group box

6. Place the cursor on 🗹 provided alongside the group box/section. As you hover the cursor on 🗹 , you can see a box appearing around the UI item. *See Figure 2.6*.

★ 📋 Create Warehouse Information				- ? 🗔 🗖	
				Save Cancel	Clear
Warehouse Identification Details					ß
Warehouse #	Description	12	Warehouse Type N V		^
Storage Location	Warehouse Category		Finance Book	127	
Warehouse Group				1	
				/	-10
- Copy Details From				_	
Warehouse # D			The group box/section can now be personalize	d	
<			by clicking the icon	>	
🖻 All	Transaction	Storage Allocation	by cherring the reon.		1
Copy Options 🛛 Zone & Bin Information	Stock Status	Storage Strategies			
User Information	Part Type	Planning Parameters			
Address Details				>	
			10		
Address					

Figure 2.6 The Personalize border for group box/section

7. Click the dicon. The **Personalize** window opens up. See Figure 2.7.

Personalize	X	
Visible:	Yes No	
Editable:	Yes No	
Rename Label:	Warehouse Identification Details	
Collapse Section:		
	Apply Clear	

Figure 2.7 The Personalize window for group box/section

- 8. To hide the link/pushbutton in the screen, select the **No** radio button under **Visible**. Alternately, select **Yes** to display the UI item.
- 9. To modify the name of the UI item, enter **Rename Label**.
- 10. To keep the group box in collapsed state upon screen launch, select the Collapse checkbox.
- 11. Click the **Apply** pushbutton to save the personalization.

#### To personalize tab

12. Place the cursor on 🗹 provided for the tab. As you hover the cursor on 🗹 , you can see a box appearing around the UI item. See Figure 2.8

Main Details Supplementary Details						
	Aintenance Info	ormation 🕅 🕅 anning Informa	tion 🕅 Purchase Information			<b>1</b>
Copy Options	Seles Information	Other Part Nos	Art Grouping			
	Stributes Conversion	Kt Information	the second se			
Pasian Datails						<b>1</b>
	-					
Previous Part # 👂			Base Part #	e e	27 	
Mod Status #			Prime Part # 👂		8	
Drawing Reference / Revision #	C.	8	Material Specification		8	
Source Document Type	▼ 2		Source Document #		C.	
Document Revision #	2		Source Document Date	iii 🖉		
- Ref. Doc. Details						
Ref. Doc. Type	▼ 2		Ref. Doc. #		2	
						- e
				12		
Ref. Notes				5		
						<del>ب</del>

#### Figure 2.8 The Personalize border for tabs



13. Click the dicon. The **Personalize** window opens up. See Figure 2.7.

Personalize			X
Visible:	Y	es 🔘	No
Editable:	Y	es 🔘	No
Rename Label:	Main	Details	
	Apply	Clear	
*0		-	

#### Figure 2.9 The Personalize window for tabs

- 14. To hide the tab in the screen, select the **No** radio button under **Visible**. Alternately, select **Yes** to display the UI item.
- 15. To modify the name of the UI item, enter **Rename Label**.
- 16. Click the **Apply** pushbutton to save the personalization.

#### To save screen personalization

17. After you complete entire personalization, click the **Save** pushbutton at the top right of the screen.

#### To remove personalization

- 18. Click the 🗹 icon alongside the UI item for which you wish to remove existing personalization.
- 19. To hide the Personalize icons in the screen, click 🔽 from the top right of the screen.
- 20. Click the **Clear** pushbutton in the Personalize window to revert the UI item to its original state in the application.

#### To remove screen personalization

- 21. To remove personalization in the screen, click the **Cancel** pushbutton from the top right of the screen.
- 22. To restore the screen to its original state, click **Clear** from the top right of the screen.

#### To work with UI post personalization

- 23. Logout of the application and then log into the application again.
- 24. Launch the activity/UI that you previously personalized or for which you cleared personalization. Now you can see the desired changes.

## **2.2 USER PERSONALIZATION**

Individual/End users can personalize screens in the Ramco Aviation application to suits their functions/roles in the organization using the Chrysalis Personalization feature. This kind of personalization can be viewed / worked with only by the user who had personalized the screen.

However, the granting of personalization rights to end users is the prerogative of an organization. Depending on preferences and work practices, an organization may grant or restrain the user personalization rights.

Tł	ne ta	ble	e be	low	shows	the	persona	lization	possibi	lities tl	hat can	be utili	zed	by users.	

UI	Visible	Editable	Rename Label
Input Fields (Header)	×	×	ü
Multiline Felds	ü	ü	ü
Links	ü	×	ü
Pushbuttons	×	×	ü
Sections/group boxes	×	×	ü
Tabs	×	×	ü

#### 2.2.1 TO PERSONALIZE AT USER-LEVEL

Follow the applicable procedures explained under similar topics in the Implementer Personalization section.

## CHRYSALIS FEATURES II

This chapter showcases those Chrysalis features that enhance the speed and productivity of users of Ramco Aviation application. These features include Inbox, Wizards and Work Areas.

Employees can instantly access application-generated messages by means of Inbox. Permanent or temporary, exclusive or personalized user interfaces can be created to suit functions/roles of users in the organization for maximum benefit from the application. For instance, a single tab of the browser can be used to accommodate multiple activities so that users can flip-flop between these activities to enhance their efficiency.

## 3.1 INBOX

The Ramco Aviation application generates messages at crucial processing points to authorized/relevant employees based on the workflow notification message configuration. **My Inbox** provides instant access to emails generated by the application for users. Users can view emails and act upon them leading to speedy maintenance. Users can even choose to viewing messages based on search criteria.

Messages are categorized as

- Alert messages
- Notification/Informational messages
- Action messages

#### 3.1.1 USING INBOX

To launch **My Inbox**, click<sup>1</sup>. The count displayed in the icon indicates the new/unread messages. *See Figure 3.1*.

≡		👯 🛧 😭 🔣 📮 Waard 🗸 Themes 🗸 <u>Search</u>	Quick Code
News :			
My Inbox	Ny Inbox View By: All messages Alert messages only Action messages only Informational messages only	Click this to launch My Inbox	Previous   Page: 1 / 43 Go   Next
	# 🗖 Date	Type Subject	<u></u>
Wizard	17/07/2015 02:58:18 PM	Invoice # <b>SI-000695-2015</b> raised against PO # APO00313315 is marked as Decision Pending with Buyer.	Ē
Menu Map	2 23/07/2015 03:09:30 РМ Click this to launch	Invoice # SI-000606-2015 raised against PO # APO00294115 is marked as Decision Pending with Buyer.	Î
Favourites	My Inbox	Invoice # SI-000719-2015 raised against PO # APO00313515 is marked as Decision Pending with Buyer.	î
menu Tag	4 🕅 17/07/2015 03:27:54 PM	Invoice # SI-000690-2015 raised against PO # APO00312715 is marked as Decision Pending with Buyer.	î
	5 📄 31/07/2015 07:20:30 PM	Invoice # <b>51-000690-2015</b> raised against PO # APO00312715 is marked as Decision Pending with Buyer.	î
	6 📃 28/10/2015 07:48:42 PM	Invoice # 51-000756-2015 raised against PO # APO00008912 is marked as Decision Pending with Buyer.	â

#### Figure 3.1 Chrysalis Inbox features

- 1. Use the **View By** drop-down list box to select the criterion for retrieving messages in the mail box. The drop-down list box displays the following options: All Messages, Alert messages only, Action messages only and Informational messages only.
- 2. Alternatively, use the Go drop-down list box for advanced search of messages. See Figure
- 3. In the **Advanced Search** window, use the **View By** drop-down list box to select the criterion for retrieving messages in the mail box. The drop-down list box displays the following options: All Messages, Alert messages only, Action messages only and Informational messages only.
- 4. To retrieve messages received during the period between specific dates, enter the **Posting Date** fields.
- 5. To retrieve messages containing specific content, enter text in Search Text.
- 6. Select the **Subject Only** check box, if you wish to retrieve messages based on subject having specific content. Conversely, do not select the check box, to the display messages containing the search text regardless of the subject.
- 7. Click **Go** to retrieve messages based on the search criteria in the mail box.
- 8. In case of Action messages, the **Subject** column indicates the action that you must perform next.
- 9. Click the **Select** pushbutton alongside to straightaway access the activity and perform the essential action.

## 3.2 WIZARD

The **Wizard** feature provides a speedy solution for defining master data and execution of jobs in the Ramco Aviation application. Two kinds of wizards are available as part of this feature: System wizards and User wizards.

System wizards are pre-defined and available to those users in the organization unit with access rights.

The **Wizard** feature is designed to help data administrators to set up master data in the intuitive logical sequence. Within a wizard, constituent activities appear in a logical sequence so as to be intuitive and fail proof for users. You can flip-flop between activities in the wizard since all of them open up as you access wizard. They remain active till the time you close the wizard. Data validation/sourcing between activities in the wizard happens seamlessly eliminating unnecessary traversal, data entry or data search/retrieval. For example, the **Create Task and setup Task Relationship** System wizard comprises all activities mandatory for creating new tasks and defining task relationships. In this way, master data can be built in a remarkably short time span.

Administrators grant users access to System wizards based on their roles spanning specific business functions in the organization.

- 1. These System wizards are in-built in Ramco Aviation:
- 2. Task and Task Relationship
- 3. MCR and Eng. Doc
- 4. Employee and Record Assignment
- 5. Parts and Alternates
- 6. Supplier
- 7. Warehouse and Users
- 8. Account Codes and Account Rule Definitions
- 9. Cost Center and Cost Center Rule Definitions
- 10. Tax and Purchase /Sales TCD
- 11. Enterprise Setup
- 12. Price List and Customer Contracts

**User wizards** as the name suggests are developed by users based on their individual/day-to-day work requirements. However, a user wizard can be viewed and worked with only by the user who has created them.

#### 3.2.1 USING SYSTEM WIZARD

1. Click I from the left panel. The Wizard page appears. The screen appears with the System Wizard list on the left and the activities comprising the first wizard on the right. (Wizards are listed under the group they belong to.). *See Figure 3.2*.

≡			256 ★ 💼	DW 📑 Wizard 🗸	Themes 🗸 Search	Quick Code
▶ News :					Welcome to Ramco Aviation Solutions Release 5.7	
	Wizard	I.				
256		8			1 Create Task Wizard Group	ß
My Inbox		Maintenance	wizard Activity		2 Update Part Requirements	Ľ
Wizard	2	Create Task and setup Task Relationship			3 Update Resource / Sign off Requirements	Ľ
		Materials			4 Update Schedules	Ľ
Menu Map	1	Create Part and setup Alternates		Ľ	5 Update Model Effectivity	Ľ
	2	Register New Supplier		Ľ	6 Update Comp. Effectivity	Ľ
Favourites			_		7 Manage File Attachment	Ľ
		Wizard			8 Manage Task Relationship	Ľ
Menu Tag			]		9 Authorize Task	ß

#### Figure 3.2 The System Wizard page

- 2. Alternately, you can select  $\square$  to display System wizards.
- 3. Select the desired wizard to display the activities on the right.
- 4. Click the disconsistent of the wizard you wish to work with. The wizard opens up. Activities in the wizard are arranged at the top in the logical/recommended sequence of execution. See Figure
- 5. To access the precise activity in the wizard, click the <sup>II</sup> icon alongside the activity. The activity screen in the wizard appears.

#### 3.2.2 ACCESS RIGHTS TO ROLES FOR SYSTEM WIZARDS

Administrators can configure system wizards and grant access rights to roles in organization units so as to enable them to work with wizards.

Configuring System wizards includes:

- Creating wizard groups and setting the listing order of groups
- Mapping wizards to a wizard group and setting the listing order of wizards under the group
- Mapping a role in the organization unit to a wizard.

#### 3.2.3 PROVIDING ACCESS RIGHTS TO ROLES FOR SYSTEM WIZARDS

- 1. Select **Utilities** from the left pane.
- 2. Select Configure eZee Wizard under Utilities. See Figure 3.3.



				256 ★ 會 🐺 📮	Default 🚽 Themes	5 <del>.</del>	Search and As a maximum	uick Code	•	Data RAMCC	Migrat OU - R	<mark>ion User</mark> amco Role
► Ne	ws :				Weld	ome	to Ramco Aviation Solutions Release 5.7					
Â	> Ut	ilitie	s 🔰 eZee Wizard 🔰 Configure eZee Wizard									
*		С	onfigure eZee Wizard					<b>=</b> 74	-	₽ 4	• ?	Co K
	Grou	р	Group Wizard Mapping Wizard OU Role Mapping									
	44	4	1 -4/4 ► ₩ + = □ ☆ T T <sub>x</sub>			Ж		Ŧ			ρ	
	#		Group Description		Group Sequence		Group Name					
	1		Finance			3	Group3					
	2		Maintenance			1	Group2					
	3		Materials			2	Group1					
	4		Sales			4	Group4					
	5											
					Favo							
					Save							
Tra	nslate	Gloss	ary									

#### Figure 3.3 Configuring System Wizards

- 3. Record group details in the <u>Group</u> tab.
- 4. Record details of group and wizard mapping in the <u>Group Wizard Mapping</u> tab.
- 5. Record details of wizard and OU role mapping in the <u>Wizard OU Role Mapping</u> tab.

#### **To proceed**

• Click the **Translate Glossary** link to translate description to the group in a language of your choice.

#### **Recording Group details**

- 6. Select the **Group** tab (By default, this tab appears). See Figure 3.3.
- 7. In the multiline, enter **Group Description**.
- 8. Enter **Group Sequence** to indicate the listing order of the group.
- 9. Click the **Save** pushbutton.

#### Recording the Group Wizard mapping

1. Select the Group Wizard Mapping tab. See Figure 3.4.

				😫 🛧 💼 👯 📮 Default	- Themes	- Search		Quick Code	→	ata Mig AMCO OL	ration User
News	: w	viation Solutions Release 5.7									
<b>^`</b> >	Utilit	ies 🔰 eZee Wizard 🔰 Configu	ure eZee Wizard								
$\star$		Configure eZee Wizard						=		÷ +	? 🗔 🖪
Gr	oup	Group Wizard Mapping	Wizard OU Role Mapping								
Grou	p Desc	ription	Materials		▼ Group Name		Group 1				
44	4	1 -3/3 🕨 🗰 🕂	- 0 % T Tx		1			•			Q
#	E	Wizard Name			Wizard Seque	nce	Wizard Description 🔎				
1	E	Setup Part					1 Create Part and setup Alternates				
2	E	Setup Supplier					2 Register New Supplier				
3	E	Setup Warehouse					3 Create Warehouse and associate Users				
4	E	1	5	tup Warehouse							
			36	tup warehouse							
					<b>6 1 1 1</b>						
					Save						
Transl	ate Glo	ossary									

#### Figure 3.4 Configuring System Group Wizard mapping

- 2. Use the **Group Description** drop-down list box to select the group to which you want to map wizards.
- 3. In the multiline, enter **Wizard Sequence** to indicate the listing order of the wizard under the wizard group.
- 4. Select **Wizard Description** to map the wizard to the group.
- 5. Click the **Save** pushbutton.

#### Recording Wizard OU Role mapping

6. Select the Wizard OU Role Mapping tab. See Figure 3.5.

			256 ★ 💼 👯 📮	Default <del>-</del> Themes	- Search		Quick Code 🔶 Dat	a Migration U CO OU - Ramco R	lser Role
▶ New		Aviation Solutions Release 5.7							
<b>^</b> >	Utili	ities > eZee Wizard > Configure eZee Wizard							
*	D)	Configure eZee Wizard					= 24 름 다	← ? 🗔	к
0	Group	Group Wizard Mapping Wizard OU Role Mapping							
OU	Name	RAMCOO	U 🔻	Role Name		salrole	•		
1	4 4	1 -12/13 → → + - □ + T T				7 10 Al	•	Q	
=		Wizard Description		Wizard Name					
1		Create part		Create part					
2		Edit part		<ul> <li>Edit Part</li> </ul>					
3		Create MCR and manage Eng. Doc		Eng. Doc. Management					
4		Enterprise Setup for New Installation		<ul> <li>Enterprise Setup</li> </ul>					
5		Create Account Code / Account Rule Definitions		<ul> <li>Setup Account Code</li> </ul>					
6		Create Pricelist and Customer Contract		<ul> <li>Setup Contract</li> </ul>					
7		Create Cost Center / Cost Center Rule Definitions	•	<ul> <li>Setup Cost Center</li> </ul>					
8		Create Employee and record Assignment	•	<ul> <li>Setup Employee</li> </ul>					
9		Create Part and setup Alternates		<ul> <li>Setup Part</li> </ul>					
10	0	Register New Supplier		<ul> <li>Setup Supplier</li> </ul>					
1	1	Create Task and setup Task Relationship		<ul> <li>Setup Task</li> </ul>					
1	2	Create Tax and setup Purchase/Sales TCD	•	<ul> <li>Setup Tax</li> </ul>					
			Fetch All Wizards				Save		
Tran	slate G	Glossary							1

#### Figure 3.5 Configuring System Wizard OU Role mapping

- 7. Use the **OU Name** drop-down list box to select the organization unit for the role you wish to map to the wizard.
- 8. Use the **Role Name** drop-down list box to select the role to that you want to connect to the wizard.
- 9. In the multiline, Select **Wizard Description**.

- 10. Alternatively, you can click the **Fetch all Wizards** pushbutton to retrieve in the multiline, all available wizards with the OU and role combination.
- 11. Click the **Save** pushbutton.

### 3.2.4 CREATING USER / IMPLEMENTER WIZARDS

1. Click 🛄 from the left panel. The Wizard page appears. *See Figure 3.6*.

	Wizard		
A 256 My Inbox		I Create / Edit Wizard	1 vb
<b>Vizard</b>	1 Contract	ß	
LE Menu Map			
Favourites			
Menu Taq			

#### Figure 3.6 The Wizard Launch page

2. Select the 🔊 icon to display the **User Wizard** page. *See Figure 3.7* 

≡			<mark>256</mark> ★ 💼 👯 📮 Wizard		Themes 👻 Search	Quick Code	tion User Ramco Role
▶ News :					Welcome to Ramco Aviation Solutions Release 5.7		
	Wizaro	1			•		
256		&		1	Create Task		
My Inbox		Maintenance		3	Update Part Requirements		Ľ
Wizard	2	Create Task and setup Task Relationship	Ľ	3	Update Resource / Sign off Requirements		
		Materials		4	Update Schedules		ß
Menu Map	1	Create Part and setup Alternates	Ľ	3	Update Model Effectivity		Ľ
	2	Register New Supplier		6	Update Comp. Effectivity		
Favourites				1	Manage File Attachment		
				8	Manage Task Relationship		
Menu Tag				ç	Authorize Task		

#### Figure 3.7 The User Wizard page

3. Select the **Create/Edit Wizard** pushbutton. The **Define User/Implementer eZee Wizard** page with the **Group** tab appears. *See Figure 3.8* 

roup		Wizard Wizard Steps Group Wiza	rd Mapping						
4		1 - 3 / 3 🕨 🗰 🛨 🗖 🗲 🕇 1	×			<b>₽ ₽ 00</b>	All	T	Q
		Group Name	Group Sequence	Group Description					
	8	Contract cycle	1	Contract					
		MRO Sales Contract	2	MRO Sales Contract					
		Test	3	Test					
				Sav	e				

#### Figure 3.8 The User Wizard page with Wizard group details

- 4. Select the <u>Group</u> tab to create/edit wizard groups.
- 5. Select the <u>Wizard</u> tab to create/edit wizards.
- 6. Select the <u>Wizard Steps</u> tab to map activities to the wizard.
- 7. Select the <u>Group Wizard Mapping</u> tab to map wizards to wizard groups.
- 8. Click the **Save** pushbutton.

#### **To proceed**

• Click the **Translate Glossary** link to translate description to the group in a language of your choice.

#### **Recording Group details**

- 1. Select the Group tab in the Define User/Implementer eZee Wizard activity. See Figure 3.8.
- 2. In the multiline, enter **Group Name** that will be name of the new wizard group.
- 3. Enter **Group Sequence** to indicate the order of display of the wizard group in the Wizard page. For example, you want the group to appear at the third place, select 3.
- 4. Enter Group Description

#### **Recording Wizard details**

1. Select the Wizard tab in the Define User/Implementer eZee Wizard activity. See Figure 3.9.



Define Use	r/Implementer eZee Wizard					2 X
Group	Wizard Steps Group	Wizard Mapping				^
44 4	1 -2/2 > >> + - 0 %	T T		≇ = 111 Al -	, D	
# 🗉	Wizard Name Next row set [Page Dow	n] Wizard Description		Wizard Type	Is Exposed	
1		Contract Cycle		Implementer		
2	MRO Contract	MRO Sales Contract		Implementer	V	
3 🗉						
	<	Sav	e		>	
		Sav	e			
						~
Translate Glos	isary					

#### Figure 3.9 Recording User Wizard details

- 2. In the multiline, enter **Wizard Name** and **Wizard Description** of the new wizard. The system displays **Wizard Type** based on the user access rights. If the user has implementer access, it will be displayed as Implementer else it shows as User.
- 3. Select the **Is Exposed** check box to restrict the wizard usage to the user. However, to enable other users to use the wizard, do not select the check box.
- 4. Select the **Save** pushbutton.

#### **Recording Wizard procedure**

5. Select the Wizard Steps tab in the Define User/Implementer eZee Wizard activity. See Figure 3.10.

De	fine	Use	r/Implementer eZee W	fizard							~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	? X
Т	Grou	ıp	Wizard Wizard Steps	Group Wizard Mapping								^
V	/izard	Descr	iption Contr	ract Cycle	Wizard Type		Implementer		Wizard Name	Wizard -1		
	44	•	1 -1/1 > > + =	🗗 🗲 🍸 🏹			と同日の		# # W	Al	Q	
	#		Steps Description		Ste	eps Sequence Number		ILBO Descripton			Activity Description	
	1		vb				1			,	<ul> <li>1604-E Annual Retur</li> </ul>	
	2										*	
			<								>	
							Save					
		-										~
Tr	inslate	e Glos	sary									

#### Figure 3.10 Recording activities and their sequence in the wizard

- 6. From the **Wizard Description** drop-down list box, select the wizard for which you wish to map activity pages. The system displays **Wizard Type** and **Wizard Name** of the selected wizard.
- 7. In the multiline, enter **Steps Description.**
- 8. Enter **Steps Sequence Number** to indicate the order of the page in the wizard.

 Enter ILBO Description (commonly called ILBO Code) of the page/screen. The multiline displays Activity Description, Component Description, ILBO Name, Activity Name and Component Name for the ILBO description that you have specified in the multiline.

### Defining Group Wizard mapping

10. Select the Group Wizard Mapping tab in the Define User/Implementer eZee Wizard activity. See Figure 3.11.

D	efine	Use	er/Implen	nenter eZee V	/izard	1												4	?	x	
	Grou	ıp	Wizard	Wizard Steps	Grou	up Wizard Mappin	ng														
	Group N	lame		Con	tract cyc	de 🔻	-	Group Sequence	1			0	Group	Descript	ion	Contract	:				
	44	•	1 - 2 / 2	> > + =	0 %	4 <b>T T</b> <sub>x</sub>			J.	L 5	x 🛛 🗈	) x# C	車	÷ 10	All		Ŧ	Q			
	#		Wizard Sec	quence	١	Wizard Description						Wizard Na	lame								
	1				2 1	MRO Sales Contract					~	MRO Con	ntract								
	2				1 0	Contract Cycle					~	Wizard -1	1								
	3										*										
							Fetch	n All Wizards								Save					
Ļ	andate	Glos	carly.																		~
	anald to	: 0/05																			

#### Figure 3.11 Recording User Wizard group mapping details

- 11. Use the **Group Name** drop-down list box to select the wizard group to which you want to add the wizard. The system displays **Group Sequence** and **Group Description**.
- 12. In the multiline, enter **Wizard Sequence** to indicate the order of listing of the wizard under the wizard group.
- 13. Enter Wizard Name and Wizard Description.
- 14. Alternately, click the **Fetch All Wizards** pushbutton to retrieve wizards in the multiline and then you can enter the wizard sequence for them.
- 15. Click the **Save pushbutton** to save the details.

#### 3.2.5 USING USER WIZARDS

- 1. Click the **Default** drop-down menu on the top icon bar.
- 2. Select Wizard. The Chrysalis page appears. See Figure 3.12.

		II 💾 🛧 🕯	🖻 DW 📮 Wizard 🗸	Themes 👻 🔚 Search		Quick Code 🔶	<b>Data Migrati</b> o RAMCO OU - Ran
News : ase	: 5.7						
	Menu Map						
<u>~</u>	Account Group		Aircraft Maintenance		Aircraft/Shop Work Ma	anagement	~
My Inbox	Customer Account Group	2 🕺 🔽	Aircraft Maintenance Execution	🛠 💿 🛠	Work Monitoring and Control	• • • •	
	Others Part Account Group		Book Keeping		Compliance Managem	ent	
Wizard	Supplier Account Group		Account Based Budget Account Rule Definition	±/i≡ ≓ > © ©	Compliance Tracking & Control		Ò
<b>.</b>	Attribute Definition		Analysis Budget	📩 🖊 🗎 🛠 🧕			
Menu Map	Attribute	<u>* / o</u>	Analysis Code	1 🗸 🛇 🖍 🧏 🧑	Discrepancy Managem	ient	
*	Component Maintenar		ARD - Additional ARD - Asset		Discrepancy Processing Structural Damage Report	≌∕⊉√∕⊗⊗ ₽∨%%	
Pavounces	Component Maintenance Plann.	·┘≝♀♀♀┘∕♀┘∕♀ ⇒	ARD - Consumption		📄 Facility / Tool Manage	ment	
	Component Replacement		ARD - Flight Contract		Facility Management	* 👌 🖊 🗟 🖻 🏷 🎯 🏶	
Hend Tug			ARD - Pavables		Flight Operations		
	Document Numbering	Class	ARD - Receivables	 	Flight Assignment	1/01/%®N	
	Document Numbering Class	0 📩 🖊 🕺	ARD - Sale ARD - Service Sale		Flight Billing Flight Contract		
	Finance Setup		Bank Reconciliation	· / @ 차 차	Flight Log		+
	Bank Cash Definition	📩 🖊 🧭 🔞 🏶 🏟 🧑	Company Consolidation	▶ 📩 >> 🕑 🧿 🕲 🏶 🧑		/ 🕸 💿 / 💩 🗘 🤤	~

Figure 3.12 The Default Chrysalis page – Menu Map

- 3. Click the **Wizard** icon from the left pane. The screen appears with the System Wizard list on the left and the activities comprising the first wizard on the right. (Wizards are listed under the group they belong to.)
- 4. Select the 🖾 icon to display the **User Wizard** page. *See Figure 3.13*.

	Wizard									
My Inbox		Create / Edit Wizard	1 vb							
	Contract									
Wizard	1 Contract Cycle									
📕 Menu Map										
Favourites										
Menu Taq										

Figure 3.13 The User Wizard page

- 5. Select the desired wizard to display the activities on the right.
- 6. Click the Cicon alongside the wizard you wish to work with. The wizard opens up. Activities in the wizard are arranged at the top in the logical/recommended sequence of execution.
- 7. To directly access the precise activity in the wizard, click the Cicon alongside the activity. The activity screen in the wizard appears.

## **3.3 WORK AREAS**

Designed on the premise of cutting down navigation and corroboration, Work Areas are temporary user interfaces created by users themselves. Users can create a work area and then affix an activity from the Ramco Aviation solution to it much like pinning a program to the task bar on your screen. In this way, a user can create multiple work areas comprising related/ dependent activities in a single browser session. They can switch between these work areas to corroborate and speed up work. These work areas will last till the browser session is closed by users.

For example, you can create two work areas, of which data from one work area supports the tasks in other work area. For example, A Material Planner can access the WorkSpace during planning part requirements (the Plan Demand activity) to retrieve current stock levels of a given part (the Inquire Stock Availability activity) for more accurate replenishment.

#### 3.3.1 CREATING WORK AREAS

- 1. Click the **Default** drop-down menu.
- 2. Click on Work Area. The Create New Work Area window appears. See Figure 3.14

Create New Wo	karea
Name:	Workarea_1
	Create Close

Figure 3.14 Creating Work Areas

- 3. Enter Name for the work area you wish to create.
- 4. Click the **Create** pushbutton. See *Figure 3.15*
- 5. Click the **Close** pushbutton to close the **Create New Work Area** window.

	248 ★ 🖶 DW 📮 Workarea_1 →	Themes 👻 Search Quick Code	Data Migration User RAMCO OU - Ramco Role
► News :			
	Default		
	Wizard		
	Workspace		
	• Workarea_1		
	New Work Area		

#### Figure 3.15 Newly created work area

#### 3.3.2 AFFIXING ACTIVITY TO WORK AREA

- 1. Click the **Default** drop-down menu.
- 2. Select the Work Area to which you want to affix an activity.
- 3. Launch the activity/page that you wish to assign to the Work Area.
- 4. To assign another activity/page to the Work Area, launch the activity/page in the work area.
- 5. Click the **Default** drop-down menu for the following tasks

- ▶ To access/create Work Areas
- ▶ To access System wizards
- To access/create User wizards
- ► To access WorkSpace

#### 3.3.3 APPLICATION PREFERENCES

#### Defining default launch screen

1. Pull down Data Migration User at the top right of Ramco Aviation launch page. See Figure 3.16.

	🔲 👭 ★ 🌚 👯 📮 Default 🖌 Default 🗸 🖾 Search	ick Code
News:		Setup UI Preferences
		Setup Application Preferences
		Setup Defaults
		Change Context
		Change Password
		About
		Logout

Figure 3.16 Setting preferences for Chrysalis features

2. From the drop-down menu, select **Setup Application Preferences**. The **Ramco Aviation – Preferences** window appears. *See Figure 3.17*.

Ramco Aviation - Preferences									
Default Options									
Launch Preference:	Wizard	T							
Wizard:	Menu Tag	T							
Theme:	Default Theme	T							
Save Preferences									

Figure 3.17 Setup Application Preferences window

- 3. Use the **Launch Preference** drop-down list box to select the default value to be displayed for the drop-down list box in the Menu bar. See Figure
- 4. Use the **Wizard** drop-down list box to select the default **Chrysalis** feature that must appear on drop-down list box selection. The Chrysalis features appear on the left pane of the screen, if Launch preference is selected as Wizard.
- 5. Use the **Theme** drop-down list box to select the color coordinates for the application user interfaces.
- 6. Select the **Save Preferences** pushbutton.

# CHRYSALIS FEATURES III

This chapter showcases those Chrysalis features that greatly reduce navigation thereby providing direct accessibility to user activity interfaces. These features include Menu Map, Menu Tag and Favorites.

Using these features from the Application Launch screen, you can straightaway access and then execute tasks. *See Figure 4.1*.



Figure 4.1 Chrysalis features

## 4.1 MENU MAP

With the Menu Map feature of Chrysalis, users can right away reach the desired activity instead of traversing the BPCcomponent-activity hierarchy. Menu map displays the conventional application launch page in a graphical format ensuring that a single click is what it takes to access any activity in the application. Menu Map is arranged in the following hierarchy:

- Menu Category
- Menu Group
- Activities mapped to Menu Group

#### 4.1.1 USING MENU MAP

1. Select Wizard from the Default drop-down list box. See Figure 4.2. Menu Map appears. See Figure 4.3.



#### Figure 4.2 Chrysalis features page with top icon bar

#### $\equiv$ 🔳 🟴 ★ 🎓 🐰 📮 Wizard 🗸 Themes 👻 🔚 Search Data Migrati RAMCO OU - Ra Quick Code 🔶 Menu Map Menu Map Aircraft Maintenance Aircraft/Shop Work Management Account Group **≁**∆ • ~ Aircraft Maintenance Execution 🛚 🛠 💿 🛠 Work Monitoring and Control Customer Account Group Others Book Keeping Compliance Management Part Account Group Compliance Tracking & Control ↓ / ☆ 然 ☆ ☆ / ↓ / ☆ 🗟 🙋 😽 Account Based Budget <u>•</u> • ← ≒ 🗐 🖊 Supplier Account Group Account Rule Definition ₩ <u>@</u> 1 / 11 % @ Henu M Attribute Definition Analysis Budget \*/0 Discrepancy Management \*/ 🔗 ষ 🏹 🚳 Attribute Analysis Code Discrepancy Processing 👘 🦯 🏥 🖸 🖊 🕺 🔕 ARD - Additional 1 Component Maintenance ARD - Asset \* 💼 Structural Damage Report 🥂 🥵 🛃 🛠 Ŕ Component Maintenance Plann... 📩 🗟 🔅 🟹 📩 🖊 💩 📩 🦯 🌼 ARD - Bank/ Cash \* 🖬 Component Replacement Facility / Tool Management ARD - Consumption 1 \* 📩 🖊 🐻 🗟 ⊃ 💩 🏶 ARD - Flight Contract Facility Management ARD - Item Flight Operations ARD - Payables Document Numbering Class ARD - Receivables 1 1 1 Flight Assignment \* / 💩 \* / % 🏶 🐚 🖓 Document Numbering Class 🛛 🕴 📩 🌽 🧑 ARD - Sale Flight Billing \* 🖬 🤞 ARD - Service Sale Flight Contract \* / 🧿 🎝 친 Finance Setup Bank Reconciliation Flight Log / 🗰 💿 / 💩 🛱 🤤 📩 🖊 🥑 🔯 🏶 🙀 🔯 Company Consolida Bank Cash Definition

#### Figure 4.3 Menu map

- 2. Alternately, you can click 💏 from the left panel.
- 3. Identify the menu category and the menu group of the activity you wish to work with.
- 4. Click on the required activity. The activity page appears

ramco

## 4.2 MENU TAG

The Menu Tag feature of Chrysalis provides an opportunity to swiftly reach the exact activity avoiding conventional traversal. Users can directly navigate to those activities that they frequently work with. Users can directly launch an activity from Menu Tag instead of traversing through BPC, Component and Activity hierarchy. The most-frequented activities by the user in the span of 90 days are tagged to Menu Tag. The size of the tag reflects the number of times the user has visited the tag. This means the tag size of the most-visited activity would be the biggest and that of the least-visited activity would be the smallest.

You can also sort the activity tags in three ways:

- Change Appearance
- Sort Alphabetically
- Sort by Strength

#### 4.2.1 USING MENU TAG

- 1. To launch Menu Tag, click 🖻 from the top icon bar.
- 2. Alternately, click from the left panel. Menu Tag appears. *See Figure 4.4*.

	🗏 🔑 🛧 🍙 🔐 📮 Wizard 🗸 Themes 🗸 🔚 Search 🦉 Card Control of
News :	Welcome to Ramco Aviation Solutions Release 5.7
	Menu Tag
My Inbox Wizard	1604-E Annual Return on Income Tax Withheld Account Distribution Ris, (By Account Code) ACCOUNT Inguiry Advate / Inactivate Analysis Code Addivate / Inactivate Asset Class Advate / Inactivate Asset Proposal Amend Asset Proposal Amend Asset Proposal Amend Asset Proposal Advate / Inactivate Asset Advate / Inactivate Advate / Inactivate Asset Advate / Inactivate Asset Advate / Inactivate Asset Advate / Inactivate Asset Advate / Inactivate Adva
Favourites	Purchase Order Authorize Purchase Request Authorize Quotation Authorize Receipt Authorize Receipt Authorize Regular Pay Batch Authorize Regular Pay Batch Authorize Release Stip Authorize Rental Order Authorize Repair Order Authorize Stock Correction Authorize Task Authorize Time Records Authorize Task Authorize Time Records Authorize Records Authorize Receipt Configuration Cancel / Edit Records Authorize Receipt Configuration Cancel / Edit Records Authorize Receipt Configuration Configure Dial Authorize Receipt Configure Dial Authorize Time Records Configure Office Receipt Confirm Stock TimeRecords Configure Printer Receipt Confirm Stock TimeRecords Confirm Stock TimeRecords Confirm Authorize Time Receipt Confirm Nork Unit Changes Consolidate Company Convert Memorandum Youcher Copy Schedule/La

#### Figure 4.4 The Menu Tag page

- 3. To list activity tags in a linear manner, click **Change Appearance**. The activity tags appear in the order of usage frequency from least to maximum.
- 4. To sort activities in alphabetically order A-Z, click **Sort Alphabetically**.
- 5. To sort activities in the order of usage frequency (size of the tag) from least to maximum, click **Sort by Strength**.
- 6. Click the activity that you wish to work with. The activity page appears.

## 4.3 FAVORITES

The Favorites feature of Chrysalis primarily to cut traversal and speedup accessibility enables users to define their favorite activities and categorize them under a group. Prior to this, users can create appropriate groups for favorite activities and then add activities as favorites to the desired group. For example, you can create a group called Favorite groups can be based on business process such as Maintenance or Finance or role-based such as Maintenance Planner or Inventory Planner. For example, you can create Favorite Group called Maintenance Reports and add activities that generate aircraft and component maintenance reports to Maintenance Reports. Based on usage, you can make Favorites of frequently-visited activities and map them under an appropriate Favorite Group.

You can also add an activity under multiple groups.

#### 4.3.1 VIEWING FAVORITES ACTIVITIES AND GROUPS

- 1. Click on the  $\star$  icon at the top menu bar.
- 2. Alternately, click shows from the left pane. See Figure 4.5.

Image Conductions - ESS System Testing Environment       Favorities       Image Formula       Upbad Documents       Upbad Documents       Create Auchorite Repared       Werw Material Loss       Namage Certificate Applicability       Favorities       Image Formula       Upbad Documents       Create Customer Record       View Material Loss       Review Financial Statements       Image Certificate Applicability       Favorities       Image Certificate Applicability	≡		■ 🖡	* 🖶 🐺 📮	Wizard	Themes 👻 Search		Quick Code 🔸	Data Migration User RamcoRole - RAMCO OU
Favourites      Favourites       Favourites       Favourites       Favourites       Favourites       Favourites       Favourites       Favourites       Favourites       Favourites       Favourites       Favourites       Favourites       Favourites       Favourites       Favourites       Favourites       Favourites       Favourites       Favourites       Favourites          Favourites <b>Pavourites Pavourites Pavourites Pavourites Pavourites Pavourites Pavourites Pavourites Pavourites Pavourites</b> <	News :					Welcome to Ramco Aviation So	lutions - ESS System Testing Environm	ent	
Ter Prantan Numbering Privileges		Favourites Favourites Group Manage Formula Upload Documents Create Outdomerts Create Outdomerts Create Purchase Order View Material Request Review Financial Statements Planner Maintain Gate Define Process Entities Maintain Numbering Privileges	avorites activity	P1 Create Purchas	e Order iscrepancy pancy Information		Test     Create Purchase Order     Authorize Purchase Order     Edit Time Zone     Edit Component Replacement Details     abinaya     View Material Loss     Manage Flight Contract     Edit Main Information     Create Time Zone     Greate Attributes		

#### Figure 4.5 The Favorites page

#### 4.3.2 CREATING FAVORITE ACTIVITIES

- 1. Launch the activity that you wish to make a favorite.
- 2. Click on the  $\star$  icon at the left of the activity name. See Figure 4.6.

*	S	elect	t Purchase (	Order											= :			+	2
	defa	ult		avorites											_				
				on	rchase Order #							PO Type		-					
•				.011	Expense Type						PO	Category							
			_		CDate: From /To	1 and		1993			Ev	nense to							
					Currelian #						-	pende to	·						
			oup	_	Supplier #						-	art type		•					
				P	Part # / Mfr. Part #						Buy	er Group		•					
					User Status		•				Cr	eated by							
									Search										
	Sea	rch I	Results															_	
4	( 4		1 - 10 / 45	• 🔪 🖌 🖻	O O T T.					上面回来	2 🗎 🏼 🔮	P = 1	All		Ŧ			Q	
#		E	Purchase Orde	#	Amendment #	PO Date	Supplier #	Supp	olier Name	PO Value	Currency	Expense Ty	pe	PO Status		User St	atus		
1			APO00000411	Eavo	ritos	27/11/2011	E2E02	Supp	lier 770	2500.00	CAD	Revenue		Fresh					
2			APO00277614	Tavo	IIIES	02/04/2014	00060	Supp	olier 3	75.80	CAD	Revenue		Fresh					
3			APO00277714	grou	ps;	02/04/2014	00060	Supp	olier 3	75.80	CAD	Revenue		Fresh					
4			APO00279514	The t	tick	16/04/2014	36361	Supp	lier 129	1500.00	USD	Revenue		Fresh					
5			APO00284614	india	at as the	25/06/2014	00060	Supp	olier 3	450.00	CAD	Capital		Fresh					
6			APO00285114	indic	ates the	27/06/2014	00060	Supp	olier 3	10.00	CAD	Revenue		Fresh					
7			APO00285214	grou	p to which	27/06/2014	00060	Supp	olier 3	10.00	CAD	Revenue		Fresh					
8			APO00285314	the a	activity	27/06/2014	00060	Supp	olier 3	10.00	CAD	Revenue		Fresh					
9			APO00285414		locivicy	27/06/2014	00060	Supp	olier 3	10.00	CAD	Revenue		Fresh					
1	0		APO00285514	belor	ngs.	1 30/06/2014	00060	Supp	olier 3	100.00	CAD	Revenue		Fresh					
						<												>	
-																		_	
					Authorize Pur	chase Order						Return Purc	hase Order						
_																			

#### Figure 4.6 Favorite group and activity

3. Select the Favorite group in which you wish to add the activity. Now, you can see the activity under the selected group in the Favorites page.

#### 4.3.3 CREATE FAVORITE GROUP

- 1. Launch an activity from the application.
- 2. Click on the 📩 icon at the top left of the page. The drop-down list displays Favorite groups. See Figure
- 3. Select Create Group. The Create & Map to Group window appears. See Figure 4.7.

Create & Map to G	roup	
Group Name:	GroupDiscrepancy	×
	Add to Group	Close

Figure 4.7 Creating Favorite group

- 4. Select the **Add to Group** pushbutton.
- 5. Select the **Close** pushbutton to close the window without saving details. Now, you can see the new group in the Favorites drop-down list. *See Figure 4.8.*

😿 🗎 Maintain Discrepancy Information				III -74	₽ 4	-
default						-
Test ancy O Upload Discrepancy						
Planner terria Additional Search Criteria						_
GroupM splay Option Open Discrepancies	Maint. Object	Ŧ	Discrepancy Type	•		
✓ GroupDiscrepancy ecord Status ▼	Discrepancy Category	•	ATA #			
Create Group	Deferral Type / Item #	<b>v</b>	Discrepancy #			1
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New lavorites group		Search				
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#### Figure 4.8 Creating and grouping Favorite activity

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