



Workflow

User Guide

Version 5.5

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B BUSINESS PROCESS: WORK FLOW

■ Scenario 1 Details: Organization wants to Create Workflow Setup with Only Notification Messages.

Example: - Creation of new Department

SL. #	FLOW OF EVENTS	PRIMARY ACTOR(S)	BUSINESS COMPONENT	ACTIVITY	PAGE	FUNCTIONAL STEPS
1.	User sets the Configuration Security	Workflow User	Workflow Management	Enable Workflow Security	Enable Workflow Security	<ul style="list-style-type: none"> ▶ User selects the login user name for which workflow configuration security needs to be given. ▶ User selects the Area – Org. Unit combination for which security permission needs to be given.
2.	User sets the Authorization Option	Workflow User	Workflow Management	Set Authorization Option	Set Authorization Option	<ul style="list-style-type: none"> ▶ User takes the help on Area (DEPT DEFN) and selects the area for which Authorization option needs to be set. ▶ User selects the Authorization Option as Notification Only Required (total four options available: Authorization Not Required, Notification Only Required, Single Step Authorization Without Configurator & Authorization Steps

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						Through Configurator) for the Initiating Org. Units displayed in the multiline.
3.	User Defines the Messages	Workflow User	Workflow Management	Define Message	Define Message - Choose Message Define Message	<ul style="list-style-type: none"> ▶ User selects the Component – Activity – Task – Notification Type for which messages needs to be defined and takes the Define Messages link. ▶ User selects the value from the Notification Type Combo as Message. ▶ Press Get Default Messages button. ▶ Message Details get displayed (user can change the message body, can add/ edit / remove the placeholders) and pressing save, Message ID gets generated & displayed. Incase if there is no message getting defaulted, then the user can define his own message by choosing the notification type and giving a message description, subject and message in the page.
4.	User defines the Workflow Profile(Optional).	Workflow User	Workflow Management	Define Workflow Profile	Define Workflow Profile	<ul style="list-style-type: none"> ▶ User enters the Workflow Profile name ▶ User enters the User Name/ User Org. Unit. Also user can send to a Proxy User Name/ Proxy Org. Unit (If applicable) – this is not a mandatory option.

5.	User enables the notification messages	Workflow User	Workflow Management	Enable Notification Messages	<p>Enable Notification Messages – Choose Task</p> <p>Enable Notification Messages</p> <p>User Identification – Direct Resource Path</p> <p>User Identification – Rule Based Path</p>	<ul style="list-style-type: none"> ▶ User selects the Component – Activity – Task combination (department definition) for which notification messages needs to be enabled ▶ For the selected state, user fills up the multiline details. For the User Identification Basis, one of the four options (Direct Entry, Rule Based, Stored Procedure Based or Direct Span of Control) is used. User selects the Direct Entry Option. ▶ User takes the Hyperlink to the “User Identification – Direct Resource Path” page and specifies the User names/ Workflow Profiles against the particular message.
6.	Applicant User logins in	User	My Page	View Messages	View Messages	<ul style="list-style-type: none"> ▶ The user performs search for documents by entering one or more of the following: Task Name, OU Description, From-date & To-date, Notification Type, Messages (read / Unread) OR Mandatory (Y/N). User views the pending documents and their status.

■ **Scenario 2 Details: Organization wants to Create Workflow Setup with ‘Authorization Through Configurator’.**

Supervisor authorization through Self Service, with HR user also having permission to authorize the same. Primarily involving MY PAGE Component – Activities Alternate User, Monitor To Do, View Document Status & Re-routing. Example: Change in personal information

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1.	User sets the Configuration Security	Workflow User	Workflow Management	Enable Workflow Security	Enable Workflow Security	<ul style="list-style-type: none"> ▶ User selects the login user name for which workflow configuration security needs to be given. ▶ User selects the Area – Org. Unit combination for which security permission needs to be given.
2.	User sets the Authorization Option	Workflow User	Workflow Management	Set Authorization Option	Set Authorization Option	<ul style="list-style-type: none"> ▶ User takes the help on Area and selects the area for which Authorization option needs to be set. ▶ User selects the Authorization Process as ‘Authorization Steps Through Configurator’ for the Initiating Org. Units displayed in the multiline.
3.	User defines Authorization Process	Workflow User	Workflow Management	Define Authorization process	Define Authorization Process – Choose task	▶ User takes the help on Component and selects the Component / Activity / Task for which Workflow steps have to be defined.
					Define Authorization Process	▶ User creates a Path ID to the States defined in Workflow and also specifies Initiating Org Unit. (State is referred to

SL. #	FLOW OF EVENTS	PRIMARY ACTOR(S)	BUSINESS COMPONENT	ACTIVITY	PAGE	FUNCTIONAL STEPS
4.	User identifies the User	Workflow User	Workflow Management	User Identification	User Identification	<ul style="list-style-type: none"> ▶ User after defining authorization process clicks on the link provided for user identification. ▶ User identifies the user as DIRECT ENTRY from the four options provided (Direct Entry, Direct Span of Control, Stored Procedure, Rule based) mapping it to an Org Unit and State description.
					Specify Users	<ul style="list-style-type: none"> ▶ After identifying the method as DIRECT ENTRY, User selects the User using Help on Users and corresponding Org Unit for the messages to be sent.
5.	Applicant User changes his personal information and sends for the authorization.					

SL. #	FLOW OF EVENTS	PRIMARY ACTOR(S)	BUSINESS COMPONENT	ACTIVITY	PAGE	FUNCTIONAL STEPS
6.	User Logins in	User	My Page	Monitor to do List	Monitor to do List	<ul style="list-style-type: none"> ▶ User goes to his Self Service and in the Monitor to do List activity performs a search based on one or more of the following criteria Task name, OU Description, From date-To date OR simple Search. ▶ The User views the list of tasks pending for authorization and notification, along with the Mandatory & Optional count for each. The details for each 'To Do' can be seen on clicking the hyper-link.
		User	My Page	View Messages	View Messages	<ul style="list-style-type: none"> ▶ The user performs search for documents by entering one or more of the following: Task Name, OU Description, From-date & To-date, Notification Type, Messages (read / Unread) OR Mandatory (Y/N). User views the pending documents and their status. Document details are seen by clicking on the document hyperlink and also authorized, if needed.
		User	My Page	Specify Alternate User	Specify Alternate User	<ul style="list-style-type: none"> ▶ User selects the Area Code, User name, Org. Unit name, Effective from-to date & identifies the corresponding alternate User Name & OU. Here, the user can set the User-Alternate User status as Active / Inactive.

SL. #	FLOW OF EVENTS	PRIMARY ACTOR(S)	BUSINESS COMPONENT	ACTIVITY	PAGE	FUNCTIONAL STEPS
			My Page	Re-route the document	Re-route the document	<p>In case, the document is not traceable, then the following options can be used:</p> <ul style="list-style-type: none"> ▶ User should be identified by workflow to route the document. If User is not identified, then the document will be routed to the administrator. Administrator has to route the document to another user. The document, which is routed to the identified users, can also be re-routed by the workflow administrator. (Any user can do Re-Routing if the permissions are available for him / her. During implementation at site, based on the organization security requirement, the permission for re-routing can be given only for administrator or for selected/all users.) In My page component, using the 'Re- Route the document' activity, Document can be re-routed to another user in the same / different org unit.

The "View Document Status" activity allows you to view the date on which document is created and the document number and also the to state associated with the user and user's organization unit and status of the document

■ **Scenario 3 Details: Organization wants to Create Workflow Setup with ‘Single Step Authorization without Configurator’ without any workflow routing.**

Example: Authorize Assignment – Competency Information

SL. #	FLOW OF EVENTS	PRIMARY ACTOR(S)	BUSINESS COMPONENT	ACTIVITY	PAGE	FUNCTIONAL STEPS
1.	User creates the Configuration Security	Workflow User	Workflow Management	Enable Workflow Security	Enable Workflow Security	<ul style="list-style-type: none"> ▶ User selects the login user name for which workflow configuration security needs to be given. ▶ User selects the Area – Org. Unit combination for which security permission needs to be given.
2.	User sets the Authorization Option	Workflow User	Workflow Management	Set Authorization Option	Set Authorization Option	<ul style="list-style-type: none"> ▶ User takes the help on Area and selects one area.(competency) ▶ User selects ‘Single step authorization without configurator” as the Authorization Process.
3.	Authorized User Logins in	Authorized User	My Page	Monitor to do List	Monitor to do List	<ul style="list-style-type: none"> ▶ Any User, who has access to the left pane, goes to that particular activity and authorizes the activity.

The user records the assignment-competency information and the record is available in the left pane for authorization in authorize employment information of the employment information component.

- **Scenario 4 Details: Organization wants to create Workflow Step ‘Authorization not required’, but email to be sent to selected list of recipients. Broadcast message.**

Example: Position Control Creation.

SL. #	FLOW OF EVENTS	PRIMARY ACTOR(S)	BUSINESS COMPONENT	ACTIVITY	PAGE	FUNCTIONAL STEPS
1.	User creates the Configuration Security	Workflow User	Workflow Management	Enable Workflow Security	Enable Workflow Security	<ul style="list-style-type: none"> ▶ User selects the login user name for which workflow configuration security needs to be given. ▶ User selects the Area – Org. Unit combination for which security permission needs to be given.
2.	User sets the Authorization Option	Workflow User	Workflow Management	Set Authorization Option	Set Authorization Option	<ul style="list-style-type: none"> ▶ User takes the help on Area and selects the area for which Authorization option needs to be set (Position control) ▶ User selects the Authorization Option as Authorization Not Required (total four options available: Authorization Not Required, Notification Only Required, Single Step Authorization Without Configurator & Authorization Steps Through Configurator) for the Initiating Org. Units displayed in the multiline.
3.	User Defines the Messages	Workflow User	Workflow Management	Define Message	Define Message - Choose Message Define Message	<ul style="list-style-type: none"> ▶ User selects the Component – Activity – Task – Notification Type for which messages needs to be defined and takes the Define Messages link.

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						<ul style="list-style-type: none"> ▶ User selects the value from the Notification Type Combo. ▶ User selects one notification type from the combo as Message and Presses Get Default Messages button. ▶ Message Details get displayed (user can change the message body, can add/ edit / remove the placeholders) and pressing save, Message ID gets generated & displayed. Incase if there is no message getting defaulted, then the user can define his own message by choosing the notification type and giving a message description, subject and message in the page.
4.	User enables the notification messages	Workflow User	Workflow Management	Enable Notification Messages	Enable Notification Messages – Choose Task Enable Notification Messages	<ul style="list-style-type: none"> ▶ User selects the Component – Activity – Task combination for which notification messages needs to be enabled ▶ For the selected state, user fills up the multiline details. For the User Identification Basis, one of the four options (Direct Entry, Rule Based, Stored Procedure Based or Direct Span of Control) is used. User selects the Direct Entry Option and specifies the email mode as yes.
5.	User maintains Email	Workflow User	Workflow	Maintain Email ID	Maintain Email	<ul style="list-style-type: none"> ▶ The user specifies the Email Ids (User Ids

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	ID information		Management	Information	ID Information	to whom the messages have to be sent).
6.	Authorized User creates Position Control ID	User			Creates Position Control ID	<ul style="list-style-type: none"> ▶ The User creates Position Control ID (i.e. Authorize permission is assumed as implicitly available for the person who is creating the document.) An Email is sent to the Email ID specified in Maintain Email ID Information as "Position control ID created".

- **Scenario 5 Details: Organization wants to Create Workflow Setup with Multilevel Steps of Authorization with users being identified by Direct Entry method and notification type set as 'Escalation'.**

Example: - Record Compensation Information.

SL. #	FLOW OF EVENTS	PRIMARY ACTOR(S)	BUSINESS COMPONENT	ACTIVITY	PAGE	FUNCTIONAL STEPS
1.	User creates the Configuration Security	Workflow User	Workflow Management	Enable Workflow Security	Enable Workflow Security	<ul style="list-style-type: none"> ▶ User selects the login user name for which workflow configuration security needs to be given. ▶ User selects the Area – Org. Unit combination for which security permission needs to be given.
2.	User sets the Authorization Option	Workflow User	Workflow Management	Set Authorization Option	Set Authorization Option	<ul style="list-style-type: none"> ▶ User takes the help on Area and selects the area for which Authorization option needs to be set. ▶ User selects Authorization Steps Through Configurator as authorization option for the Initiating Org. Units in the multiline.
3.	User defines Authorization Process	Workflow User	Workflow Management	Define Authorization process	Define Authorization Process – Choose task	<ul style="list-style-type: none"> ▶ User takes the help on Component and selects the Component / Activity / Task (Compensation) for which Workflow steps have to be defined.
					Define Authorization Process	<ul style="list-style-type: none"> ▶ User creates a Path ID to the States defined in Workflow and also specifies Initiating Org Unit.

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4.	User Defines the Messages	Workflow User	Workflow Management	Define Message	Define Message - Choose Message	<ul style="list-style-type: none"> ▶ User selects the Component – Activity – Task – Notification Type for which messages needs to be defined and takes the Define Messages link. ▶ User selects the value from the Notification Messages Type Combo as Escalation and Presses Get Default Messages button.
					Define Message	<ul style="list-style-type: none"> ▶ Message Details get displayed (user can change the message body, can add/ edit / remove the placeholders) and pressing save, Message ID gets generated & displayed. Incase if there is no message getting defaulted, then the user can define his own message by choosing the notification type and giving a message description, subject and message in the page.

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5.	User enables the notification messages	Workflow User	Workflow Management	Enable Notification Messages	Enable Notification Messages – Choose Task Enable Notification Messages User Identification – Direct Resource Path User Identification – Rule Based Path	<ul style="list-style-type: none"> ▶ User selects the Component – Activity – Task combination for which notification messages needs to be enabled ▶ For the selected state, user fills up the multiline details. For the User Identification Basis, one of the four options (Direct Entry, Rule Based, Stored Procedure Based or Direct Span of Control) is used. User selects the Direct Entry Option. ▶ User takes the Hyperlink to the “User Identification – Direct Resource Path” page and specifies the User names/ Workflow Profiles against the particular message. Also user identifies the mode of communication (if he desires to communicate through fax, mobile options that are available to him – Email Option is mandatory that is to be filled – Yes or no – i.e. whether he wishes to communicate or not.

SL. #	FLOW OF EVENTS	PRIMARY ACTOR(S)	BUSINESS COMPONENT	ACTIVITY	PAGE	FUNCTIONAL STEPS
6.	User identifies the User	Workflow User	Workflow Management	User Identification	User Identification	<ul style="list-style-type: none"> ▶ User after defining authorization process clicks on the link provided for user identification. ▶ User identifies the user as DIRECT ENTRY from the four options provided (Direct Entry, Direct Span of Control, Stored Procedure, Rule based) mapping it to an Org Unit and State description. Stored procedure can be identified by clicking on Help on User SP.
					Specify Users	<ul style="list-style-type: none"> ▶ After Identifying the method, User selects the User using Help on Users and corresponding Org Unit for the messages to be sent. Proxy User is identified for the messages to be sent (if required). Proxy User is an alternate user who is also eligible to authorize.
7.	Authorizer logins in	Authorizer	My Page	Monitor to do List	Monitor to do List	<ul style="list-style-type: none"> ▶ Authorized User goes to his Self Service and in the Monitor to do List activity performs a search based on one or more of the following criteria Task name, OU Description, From date-To date OR simple Search. ▶ The User views the list of tasks pending for authorization and notification, along with the Mandatory & Optional count for each. The details for each 'To Do' can be seen by clicking the hyper-link.

SL. #	FLOW OF EVENTS	PRIMARY ACTOR(S)	BUSINESS COMPONENT	ACTIVITY	PAGE	FUNCTIONAL STEPS
8.	Applicant User logins in	User	My Page	View Messages	View Messages	<ul style="list-style-type: none"> ▶ The user performs search for documents by entering one or more of the following: Task Name, OU Description, From-date & To-date, Notification Type, Messages (read / Unread) OR Mandatory (Y/N). User views the pending documents and their status. Document details are seen by clicking on the document hyperlink and also authorized, if needed.
9.			My Page	Specify Alternate User	Specify Alternate User	<ul style="list-style-type: none"> ▶ Workflow User selects the Area Code, User name, OU name, Effective from-to date & identifies the corresponding alternate User Name & OU. Here, the user can set the User-Alternate User status as Active / Inactive.

The document, if not authorized, will get escalated to the user specified after the period mentioned in Enable Notification Message elapses. (e.g. One Hour)

Note: To enable email option or the notification type 'Escalation' a job scheduler or a scheduler needs to be run.

- **Scenario 6 Details: Organization wants to Create Workflow Setup with Multilevel Steps of Authorization with users / recipients being identified by simple business rules.**

Example: - Authorize Assignment- Qualification Information.

SL. #	FLOW OF EVENTS	PRIMARY ACTOR(S)	BUSINESS COMPONENT	ACTIVITY	PAGE	FUNCTIONAL STEPS
1.	User creates the Configuration Security	Workflow User	Workflow Management	Enable Workflow Security	Enable Workflow Security	<ul style="list-style-type: none"> ▶ User selects the login user name for which workflow configuration security needs to be given. ▶ User selects the Area – Org. Unit combination for which security permission needs to be given.
2.	User sets the Authorization Option	Workflow User	Workflow Management	Set Authorization Option	Set Authorization Option	<ul style="list-style-type: none"> ▶ User takes the help on Area and selects the area for which Authorization option needs to be set(assignment-Qualification). ▶ User selects Authorization Steps Through Configurator for the Initiating Org. Units as the authorization option.
3.	User defines Authorization Process	Workflow User	Workflow Management	Define Authorization process	Define Authorization Process – Choose task	▶ User takes the help on Component and selects the Component / Activity / Task for which Workflow steps have to be defined.
					Define Authorization Process	▶ User creates a Path ID or Process ID to the States defined in Workflow and also specifies Initiating Org Unit.

SL. #	FLOW OF EVENTS	PRIMARY ACTOR(S)	BUSINESS COMPONENT	ACTIVITY	PAGE	FUNCTIONAL STEPS
4.	User Defines Workflow Steps	Workflow User	Workflow Management	Define Workflow Steps	Define Workflow Steps	<ul style="list-style-type: none"> ▶ User defines Workflow Steps for Component, Activity and Task(Assignment-Qualification).
5.	User identifies the User	Workflow User	Workflow Management	User Identification	User Identification	<ul style="list-style-type: none"> ▶ User after defining authorization process clicks on the link provided for user identification. ▶ For the states defined in Define Workflow Steps, the Workflow User identifies the basis on which the user would receive the document. The user selects Ruled based option. The user specifies a resource rule ID and description for the rule and gives the rule(available in data sheet).
					Specify Users	<ul style="list-style-type: none"> ▶ After identifying the method, User selects the User using Help on Users and corresponding Org Unit for the messages to be sent. Incase, if required Proxy User is identified.

SL. #	FLOW OF EVENTS	PRIMARY ACTOR(S)	BUSINESS COMPONENT	ACTIVITY	PAGE	FUNCTIONAL STEPS
6.	Authorizer logins in	Authorizer	My Page	Monitor to do List	Monitor to do List	<ul style="list-style-type: none"> ▶ Authorized User goes to his Self Service and in the Monitor to do List activity performs a search based on one or more of the following criteria Task name, OU Description, From date-To date OR simple Search. ▶ The User views the list of tasks pending for authorization and notification, along with the Mandatory & Optional count for each. The details for each 'To Do' are seen by clicking the hyper-link.
7.	A document on Assignment-Qualification information is created. The record is then available to the authorized user, in accordance with the rule specified.					

SL. #	FLOW OF EVENTS	PRIMARY ACTOR(S)	BUSINESS COMPONENT	ACTIVITY	PAGE	FUNCTIONAL STEPS
8.	Applicant User logins in	User	My Page	View Messages	View Messages	<ul style="list-style-type: none"> ▶ The user performs search for documents by entering one or more of the following: Task Name, OU Description, From-date & To-date, Notification Type, Messages (read / Unread) OR Mandatory (Y/N). User views the pending documents and their status. Document details are seen by clicking on the document hyperlink and also authorized, if needed.

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