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RAMCO AVIATION SOLUTION

VERSION 5.8

USER GUIDE

PURCHASE OPERATIONS HUB

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 4 chapters and index. Given below is a brief run-through of what each chapter consists of.

Chapter 1 provides an overview of the entire **Purchase Operations** business process. The sub processes are explained in the remaining chapters.

Chapter 2 focuses on the **Purchase Operations Hub** sub process.

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 icon 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.

contents

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INTRODUCTION

Buyer, a person responsible for the procurement needs to visit multiple screens across different business components to accomplish a day's work. The business need is to provide a dashboard/hub available for the buyer wherein complete visibility of the documents pending for action should be available. Also, there should be a provision to process the documents pending for action, from this hub.

The **Purchase Operations Hub** provides a dashboard to manage all the Purchase Operations. Provision of wide variety of Purchase Transactions like Purchase Order, Purchase Request, Quotation, Release Slip and Request for quotation into a single, dashboard view, eliminates the need to visit different processes, activities and screens, simplifying navigation. The hub also displays only necessary information based on the context. The seamless integration of the hub can greatly simplify internal processes, enabling user to focus on core business.

PURCHASE OPERATIONS HUB

The **Purchase Operations Hub** addresses the above requirements by acting as a landing screen for the buyer to process the documents along with the following capabilities:

- Listing of the documents like Purchase Order, Purchase Request, Quotation, Release Slip and Request for quotation documents for quick review.
- Grouping of documents listed under Buyer Group / Priority basis.
- Provision to directly filter and retrieve desired document from the list using filter options.
- Provision to navigate to the next possible screen to work on the listed document.
- Provision to launch the frequently visited screens by a buyer.
- Provision to choose the default document group at each user level.

2.1 MANAGING SCREEN DEFAULTS & PREFERENCES

This activity allows the user to identify the parameters which govern the data displayed in the **Purchase Operations Hub**. User can set the Preference for a given User - Role - User Interface combination.

1. Select the icon '' **in the Purchase Operations Hub** screen. **The Manage Screen Defaults & Preferences** page appears. *See Figure 2.1.*

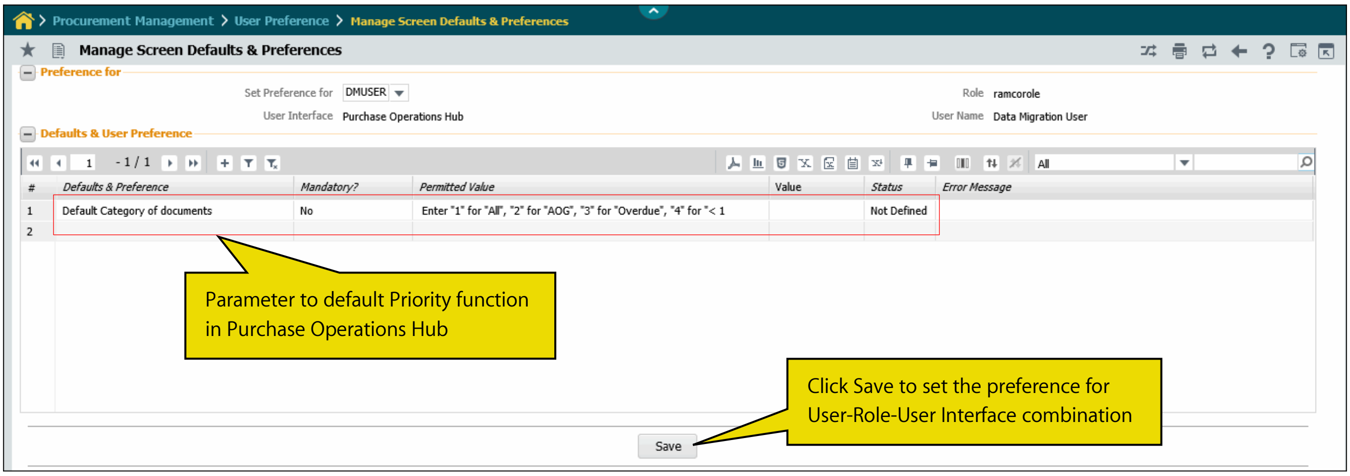

Figure 2.1 Managing screen defaults & preferences

2. In the **Set preference for** drop-down list box, select the user to set the Preference for a given User - Role - User Interface combination.
3. The system displays the list of parameters and corresponding **Permitted Values** in the **Defaults & User Preference** multiline.
4. Specify the **Value** and click **Save** to set the preference for the Purchase Operations Hub.

2.2 WORKING WITH PURCHASE OPERATIONS HUB

The **Purchase Operations Hub** provides a dashboard to manage Purchase Operations, which would enlist the documents pending for action, such as Purchase Order, Purchase Request, Quotation, Release Slip and Request for quotation documents. The hub enables quick review of the pending documents and allows processing the pending documents.

1. Select the **Purchase Operations Hub** activity under **Purchase Operations Hub** business component under the **Procurement Management** business process. The **Purchase Operations Hub** page appears. *See Figure 2.2.*

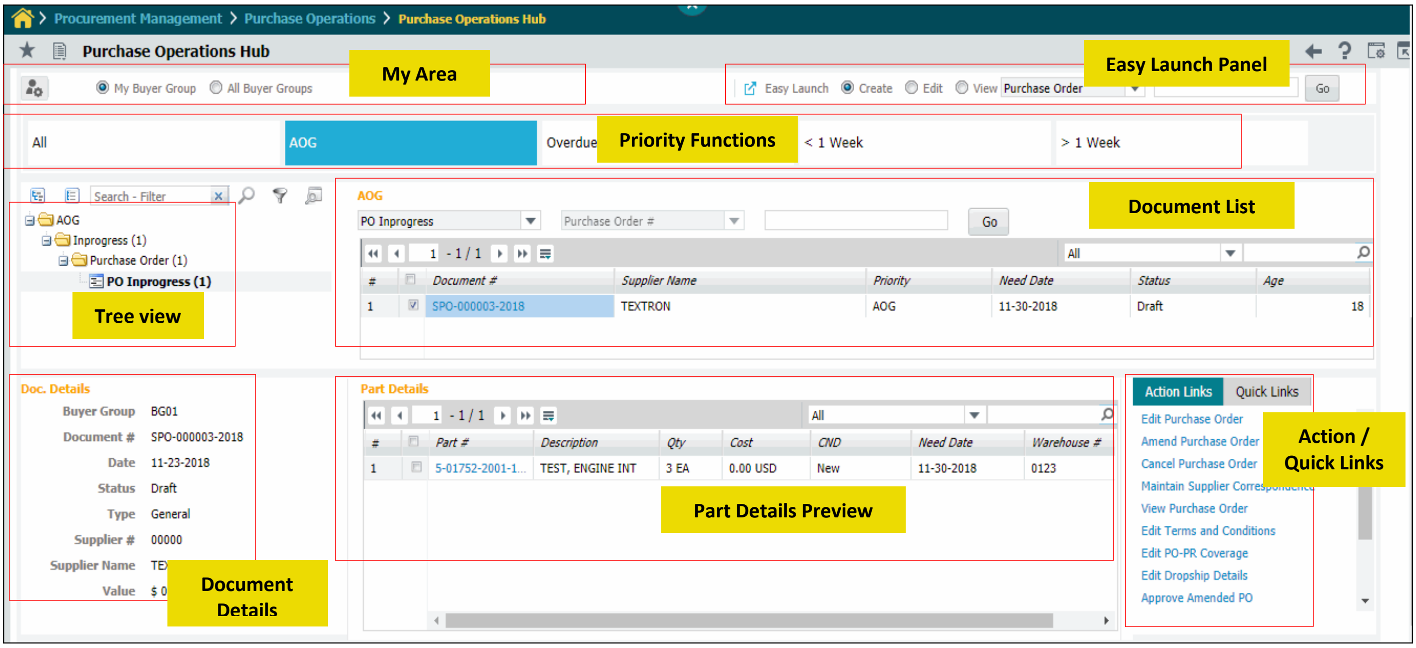

Figure 2.2 Purchase Operations Hub

The Purchase Operations Hub has the following panels:

1. My Area & Easy Launch Panel

2. Priority Functions – All, AOG, Overdue, <1 week, >1 week

- Tree Panel
- Document List Panel
- Doc. Details Panel
- Part Details multiline
- Action Links and Quick Links Panel

2.2.1 DEFINING / MODIFYING MY AREA

This section enables the user to select either ‘Buyer Group’ to retrieve the documents associated with the Buyer Group defined as ‘Primary Buyer Group’ for the login user, or ‘All Buyer Groups’ to retrieve the documents across Buyer Groups.

1. The **My Area** section is available at the top of the **Purchase Operations** Hub. *See Figure 2.3*.

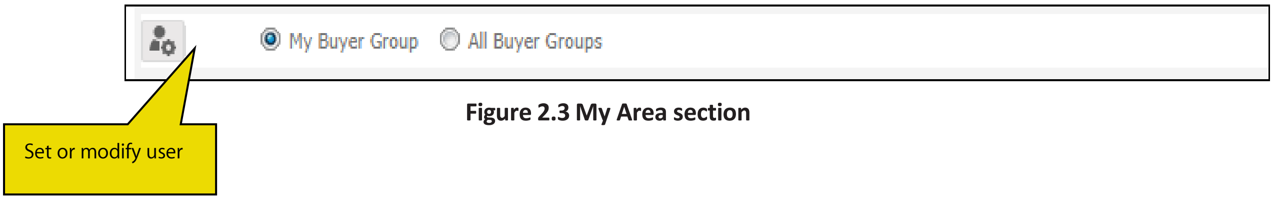

Figure 2.3 My Area section

2. If the employee code mapped to the login user is defined in any Buyer Group with the Buyer Type as 'Primary' in the “Create Buyer Group” activity of the “Buyer Group” business component, then the “My Buyer Group” radio button is defaulted.
3. If employee code mapped to the login user is not available in any Buyer Group or if the Buyer Type is not available as 'Primary' in any of the Buyer Group, then “All Buyer Groups” radio button is defaulted.

2.2.2 EASY LAUNCH PANEL

This section facilitates launch of various application screens for creation or modification of purchase operation documents.

1. Select the **Create** radio button in the **Easy Launch** section. *See Figure 2.4.*

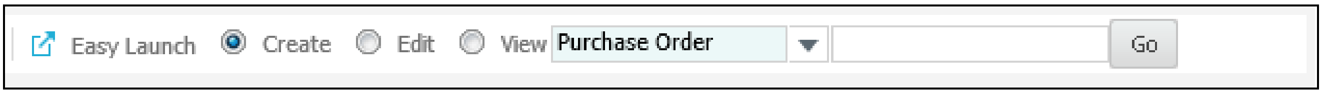

Figure 2.4 Easy Launch section

2. Enter a ‘Purchase Order’, ‘Purchase Request’, ‘Quotation’, ‘Release Slip’ or ‘Request for Quotation’ and click the **Go** button to create the respective document.
3. Select the radio button ‘Edit / View’ and directly enter the purchase operation document number.
4. Click the **Go** button to modify or view the document.

2.2.3 PRIORITY FUNCTIONS

The documents represented as count in the tree loading (‘Pending Requests’, ‘In Progress’ and ‘To Process’) are grouped into different functions / buttons (All/AOG/Overdue/< 1 Week/> 1 Week) as per the logic given below. The Priority buttons are defaulted based on the value defined for the parameter 'Default Category of documents' in the **Manage Screen Defaults & Preferences** screen. See Figure 2.5.

Figure 2.5 Priority Button section

i. ***All***:

- Displays all the documents

ii. ***AOG***

- If the Priority of the Document corresponding to the line # considered is AOG.

iii. ***Overdue***

- If the document corresponding to the line considered is Purchase Request and if the Need Date provided in the PR Schedule line involved is lesser than the current system date.
- If the document corresponding to the line considered is Purchase Order and if the Earliest Due Date available in the PO Schedule Line involved is lesser than the current system date.
- If the document corresponding to the line considered is Request for Quotation and if the Reply Date available in the RFQ document is lesser than the current system date.
- If the document corresponding to the line considered is Quotation and if the Need Date available in the Quotation Schedule Line involved is lesser than the current system date.
- If the document corresponding to the line considered is Release Slip and if the Earliest Due Date available in the RS Schedule Line involved is lesser than the current system date.

iv. ***<1 week***

- If the document corresponding to the line considered is Purchase Request and if the Need Date provided in the PR Schedule line involved falls equal to or lesser than Current Date + 7 Days window.
- If the document corresponding to the line considered is Purchase Order and if the Earliest Due Date available in the PO Schedule Line involved falls equal to or lesser than Current Date + 7 Days window.
- If the document corresponding to the line considered is Request for Quotation and if the Reply Date available in the RFQ document falls equal to or lesser than Current Date + 7 Days window.
- If the document corresponding to the line considered is Quotation and if the Need Date available in the Quotation Schedule Line involved falls equal to or lesser than Current Date + 7 Days window.
- If the document corresponding to the line considered is Release Slip and if the Earliest Due Date available in the RS Schedule Line involved falls equal to or lesser than Current Date + 7 Days window.

v. ***>1 week***

- If the document corresponding to the line considered is Purchase Request and if the Need Date provided in the PR Schedule line involved falls equal to Current Date + 7 Days window or greater than that.
- If the document corresponding to the line considered is Purchase Order and if the Earliest Due Date available in the PO Schedule Line involved falls equal to Current Date + 7 Days window or greater than that.
- If the document corresponding to the line considered is Request for Quotation and if the Reply Date available in the RFQ document falls equal to Current Date + 7 Days window or greater than that.
- If the document corresponding to the line considered is Quotation and if the Need Date available in the Quotation Schedule Line involved falls equal to Current Date + 7 Days window or greater than that.
- If the document corresponding to the line considered is Release Slip and if the Earliest Due Date available in the RS Schedule Line involved falls equal to Current Date + 7 Days window or greater than that.

2.2.4 TREE PANEL AND DOCUMENT LIST PANEL

The Tree Interface displays the root nodes, the parent nodes and the child nodes along with their respective document counts. The Document categories (represented by Priority buttons) are displayed as root nodes and the parent nodes are “Pend Req”, “Inprogress” and “To Process”. The documents available are displayed as child nodes with the respective document counts, as explained below. See Figure 2.6.

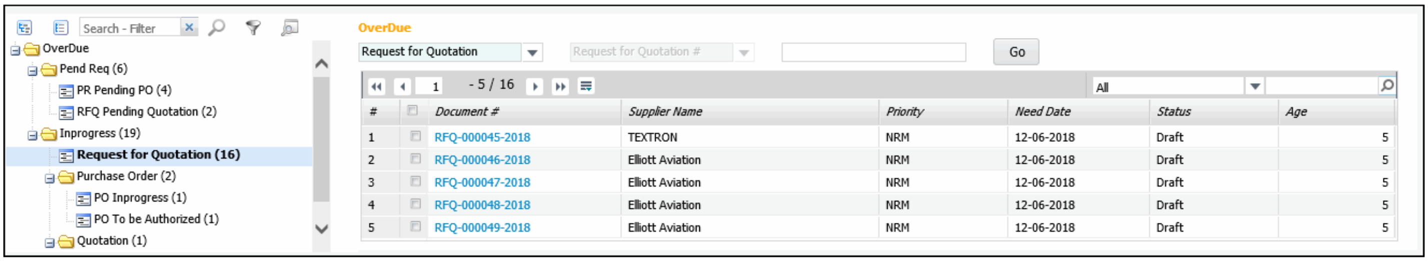

Figure 2.6 Tree Panel and Document List Panel

i. ***Pending Requests***

- PR Pending PO
- Quotation Pending PO
- Pending Quotation

ii. ***Inprogress***

- RFQ
- Quotation Inprogress
- Quotation Pending Authorization
- PO Inprogress
- PO Pending Authorization
- RS InProgress
- RS Pending Authorization

iii. ***To Process***

- Receipt Due
- Quarantined Receipts
- Invoice Pending with Buyer
- Issue Due

5. On click of the child nodes, the documents matching the Document Category are retrieved in the “Document List” multiline.
6. The “Document List” multiline displays the ‘Document #’, ‘Supplier Name’, ‘Priority’, ‘Need Date’, ‘Status’ and ‘Age’ fields.

2.2.5 DOC. DETAILS AND PART DETAILS PANEL

1. The “Doc. Details”, “Part Details” and “Action Links” sections are retrieved on click of the hyperlinked ‘Document #’ field in the “Document List” multiline.
2. The “Doc. Details” section displays the ‘Buyer Group’, ‘Document #’, ‘Date’, ‘Status’, ‘Type’, ‘Supplier #’, ‘Supplier Name and ‘Value’ fields.
3. The “Part Details” multiline displays the ‘Part #’, ‘Description’, ‘Qty’, ‘Cost’, ‘CND’ , ‘Need Date’ and ‘Warehouse #’ fields. See Figure 2.7.

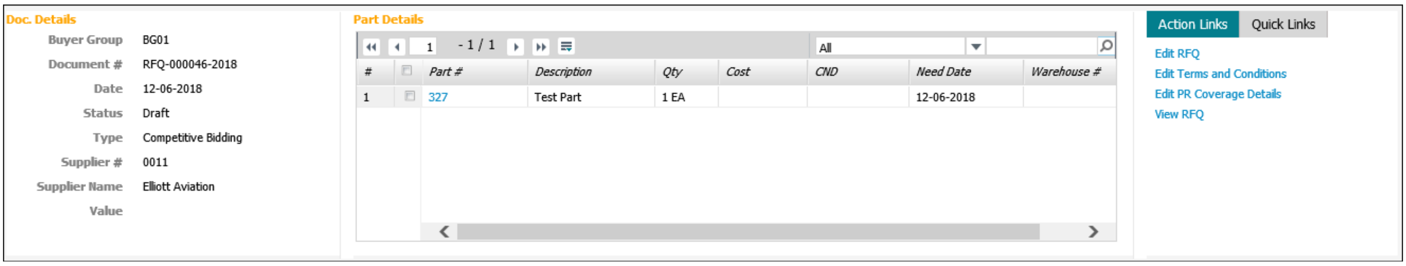

Figure 2.7 Doc. Details and Part Details Panel

2.2.6 ACTION LINKS & QUICK LINKS

1. The “Action Links” section displays the links as per the Parent Node and Child Node corresponding to the Document # in the “Document Details” section. The “Quick Links” section comprises of links to all the possible routine activities on the launch of the Hub. It displays the links that are applicable for all the documents retrieved. See Figure 2.8.

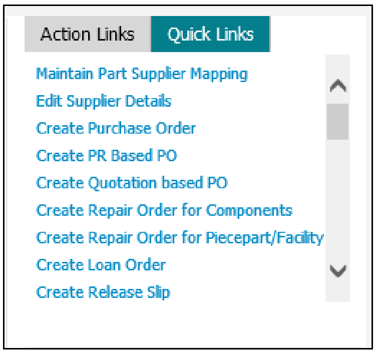

Figure 2.8 Action Links & Quick Links

Index

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