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RAMCO AVIATION SOLUTION
VERSION 5.8

USER GUIDE

COLLABORATOR

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Ramco Aviation Solution

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

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

Chapter 2 focuses on the **Collaborate** 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" is 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.

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INTRODUCTION

In the Aviation Industry MRO operations, workflow happens amongst various inter-related departments like Inventory, Hangar, Sales, Finance, and Procurement. Hence there is a need on a daily basis for the employees or roles in the respective departments to have discussions between themselves and share information associated with the workflow. This shared information not only enables the recipient users to plan and execute their activities, but in a broader sense, helps the organization to increase responsiveness and improves the turnaround time. To meet these needs, an Enterprise Solution discussion tool 'Collaborate' has been designed to provide a document-linked discussion forum with a facility to attach and view notes. The Collaborator feature is provided as a bubble (image) inside the 'Smart Bar' for various screens. Refer to Appendix A for information on the list of activities available with Collaborator tool.

Organizations currently use conventional methods of communication like e-mails, memos, telephones, fax and so on, where traceability and security are a major issue. The Collaborate feature addresses this gap by acting as a tool to collaborate, network and drive decisions. For example, a commercial clerk wants to send a note to the shipping clerk and mechanic that the crates received along with an unserviceable unit is required to be shipped back to customer along with the part. Since this is job-specific information, the same can be added as part of the Customer Order which can be viewed by the mechanic from Shop Work Order activity and by the Shipping Clerk while recording the Shipping Note of that specific job.

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In today's world, the Collaborate feature modeled on the likes of popular social networks like Facebook, LinkedIn etc. is extremely easy to understand and thus easier to embrace.

Features

▶ Real Time Information Exchange

▶ Centralized Information/Documentation

▶ Documents can be attached, posts flagged and shared.

▶ Traceability

▶ Enables new stakeholders to catch up on what is being discussed

▶ Privacy Options

▶ In-line reply facility

▶ On-demand search facility

▶ Classify information based on topics

▶ Post can be an information or action

▶ Option to share posts either with everyone, specific role or specific user.

COLLABORATE

The Collaborate discussion tool facilitates interactions across transactions and departments. This workflow involves different roles like the Receiving Clerk, Inspector, Tech Support, Production Managers, etc who add notes at various stages of the job. Such shared notes have information that enables the recipient users to plan and execute their activities on a daily basis.

Collaborate is present as a bubble (image) in the Smart Bar on the top right corner of the screen. The collaborate window on launch will display the entity/reference document number from where the collaborate window is launched. Refer to Appendix A for a list of the screens in which this facility is available.

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Collaborator tool enables you to perform the following:

▶ Add posts and share the post for a given document reference.

▶ Attach documents, flag a post and attach files.

▶ Recipients can be restricted to everyone or to only specific users (private) or specific roles like clerks, buyers, mechanics etc

▶ View posts related to linked documents or entities

▶ Set indicators / highlights to distinguish important messages

▶ Posts can either be an information post or an action post.

▶ Posts can be in document specific topics or quick code topics.

▶ In Line Reply to specific posts can be made.

▶ Visibility to see with which user/user group the information is shared. Also to whom the post is an action item or information item.

2.1 SETTING UP OF QUICK CODE FOR CREATION OF TOPICS AGAINST WHICH MESSAGES ARE POSTED

The Collaborate discussion tool facilitates the exchange of notes associated with various stages of carrying out a job, right from receiving customer parts for repair / overhaul until the delivery of serviceable parts back to the customer.

The exchange of notes through messages, are posted against specific topics. The topics can be created as a quick code or it can be created in the context of a document.

2.1.1 CREATION OF A TOPIC

1. Select **Manage Logistics Quick Codes** activity from the **Logistics Common Master** business component in the **Procurement** business process. The Manage Logistics Quick Code page appears. See Figure 2.1

Figure 2.1 Creating Collaboration quick code

2. In the **Select Quick Code Type** group box, select the **Collaborate-Default Topics** from the **Quick Code Type** drop-down list box.

3. From the **Quick Code Type Properties** group box, select either 'Yes' or 'No' to specify if the quick code type is mandatory in the **Quick Code Type Mandatory?** drop-down list box.

4. Enter the **Quick Code** and its **Description** along with the other details in the **Quick Code Details** multiline.

5. Click **Save**.

2.2   MANAGING COLLABORATE

Once topics have been defined as a quick code or created in the context of a document, you can post, view, edit and also reply to messages, and receive replies. The posted message can be viewed along with several additional information such as the User ID of the person posting the message, age of the message, number of replies against a post, reference document type, attachments if any and a pop up display which will show the names of the person with whom the post is shared.

2.2.1   ACCESSING COLLABORATE

1. Select the **Smart Bar** icon in the top right corner of the screen to access **Collaborate**. *See Figure 2.2.*

Refer to Appendix A for a list of the screens in which the **Collaborate** facility is available.
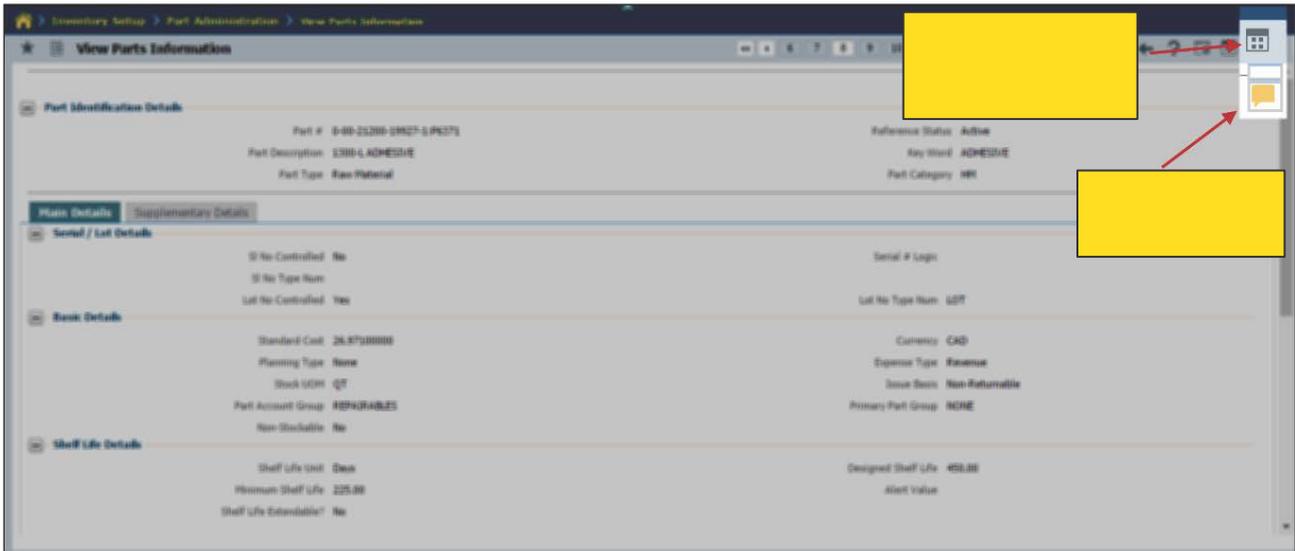
Figure 2.2 Creating Collaboration quick code

LEGENDS

⊞	Smart Bar
💬	Collaborate
+	Add Topics
⚑	Flag a post
📎	Attach document against a post
🔖	Attachment shared is only information
🔖	Attachment shared is for action to be taken
👥	Represents the users with whom information is shared
✓	Open or close a topic
✓	Reopen a topic

✏️	Edit a post
↩	Reply to a post

2.2.2 HOW TO SEARCH FOR A POST

You can search for a post and view the list of posts and replies.

1. Click ➕ **Filter Post** in the Collaborate popup. *See Figure 2.3*

2. Provide the search criteria like **Search By, From Date** and **To Date** that is, the range of date within which messages posted is to be retrieved along with the other details and click **Search** pushbutton.

3. The system retrieves the messages posted in the **Posts** section based on the filter criteria specified
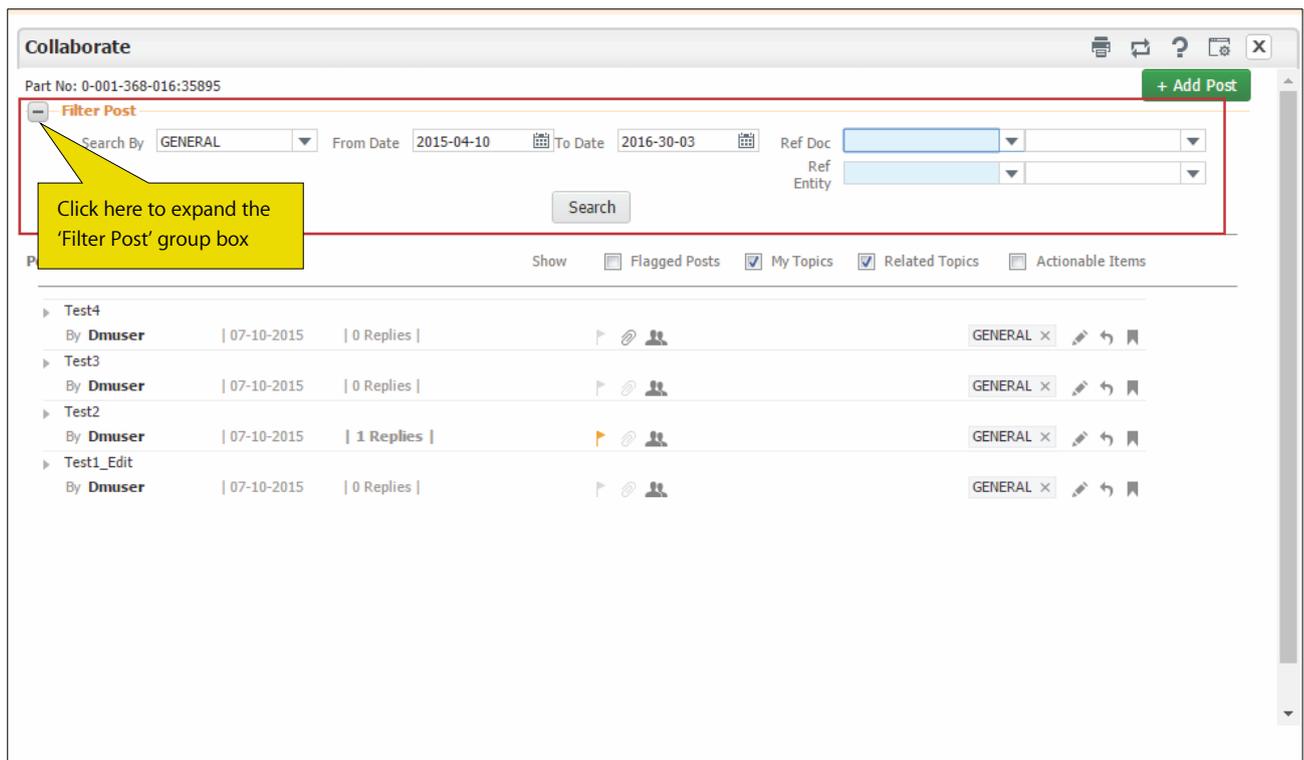
Figure 2.3 Searching for a post

2.2.3 HOW TO VIEW A POST

You can view the list of posts and replies.

1. Click ➕ **Filter Post** in the Collaborate popup. *See Figure 2.4*

2. Provide the search criteria like **Search By, From Date** and **To Date** that is, the range of date within which messages posted is to be retrieved along with the other details.

3. Click **Search** pushbutton.

4. The system retrieves the messages and replies posted in the **Posts** section based on the filter criteria specified.

5. In the **Show** section, check the check boxes My Items, **Flagged Posts**, **My Topics**, **Related Topics**, **Pending Actionable Items**, **Actionable Items** as per the information you wish to view.

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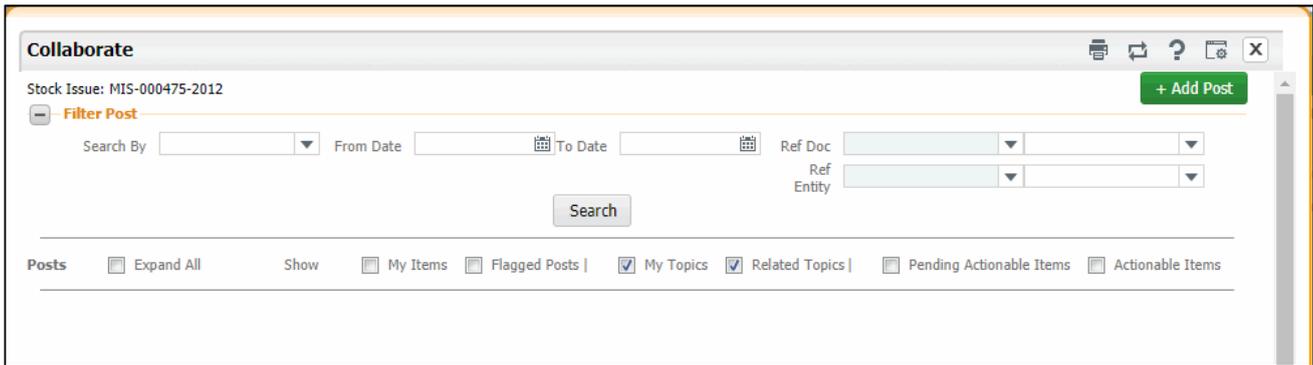
Figure 2.4 Searching for a post

2.2.4   HOW TO ENTER A NEW TOPIC

1. Click **Add Post** at the top right corner of the 'Collaborate' screen. *See Figure 2.5.*
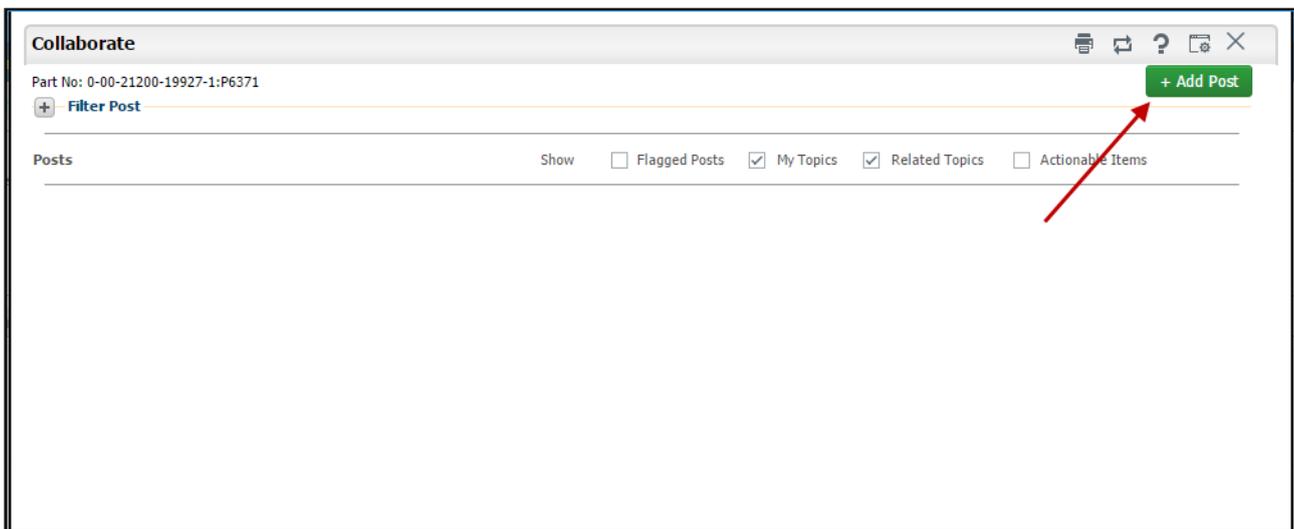
Figure 2.5 Adding a Post

2. The **Add a Post** section appears. *See Figure 2.6.*

3. Click ⊕ icon adjacent to the **Topic** field in the **Collaborate** popup.
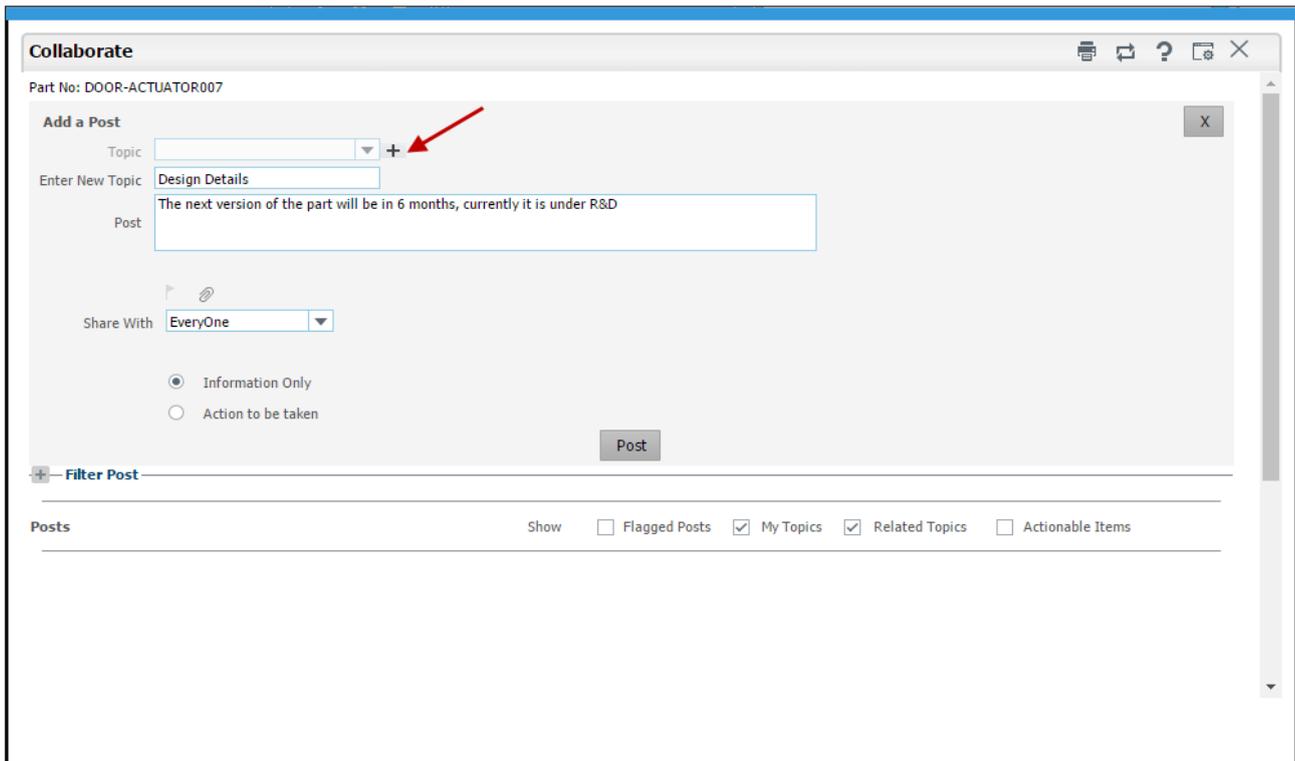
Figure 2.6 Adding a new topic

4. Enter the topic in the **Enter New Topic** field

2.2.5 HOW TO POST A MESSAGE

You can post a message under the created topic. The posted message can either be sent as an action item or just as information to several users. This helps a person to know if any action has to be taken from his side or not.

The posted message can be shared in three ways, either with everyone or with specific users or with specific roles as per the need. The names of the users or roles with whom the message is shared appears in the grid.

You have the provision to attach a document and flag a massage before posting it.

1. Click **Add Post** button at the top right corner of the 'Collaborate' screen.

2. Type the message in the **Post** field. *See Figure 2.7.*
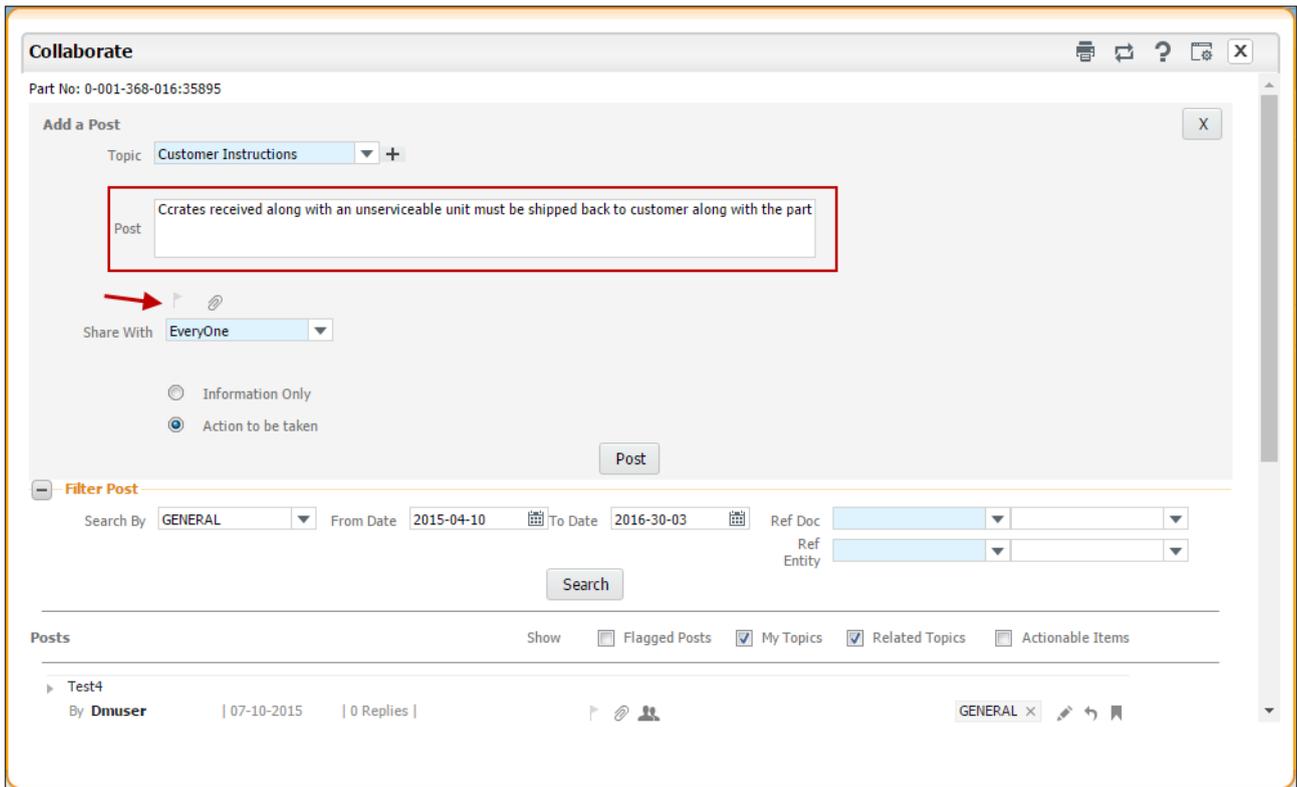
Figure 2.7 Posting a message

TO FLAG A POST

1. Click ⚑ icon to flag the post that is to set an alert distinguishing important message alerts. A ⚑ icon indicates that the message has been flagged,

TO ATTACH A DOCUMENT TO A POST

1. Click the 📎 icon to attach document against the post.

2. Use the **Share With** drop-down list box to select whether you wish to share the information with **Everyone** or a **Specific User** or a **Specific Role**.

3. Click **Post**.

2.2.6   HOW TO REPLY TO A POST

You can reply to a particular message in line. Here relevant reply messages can be posted.

1. Select the ↩ icon to reply to a post. The **Reply to Post** group box appears.
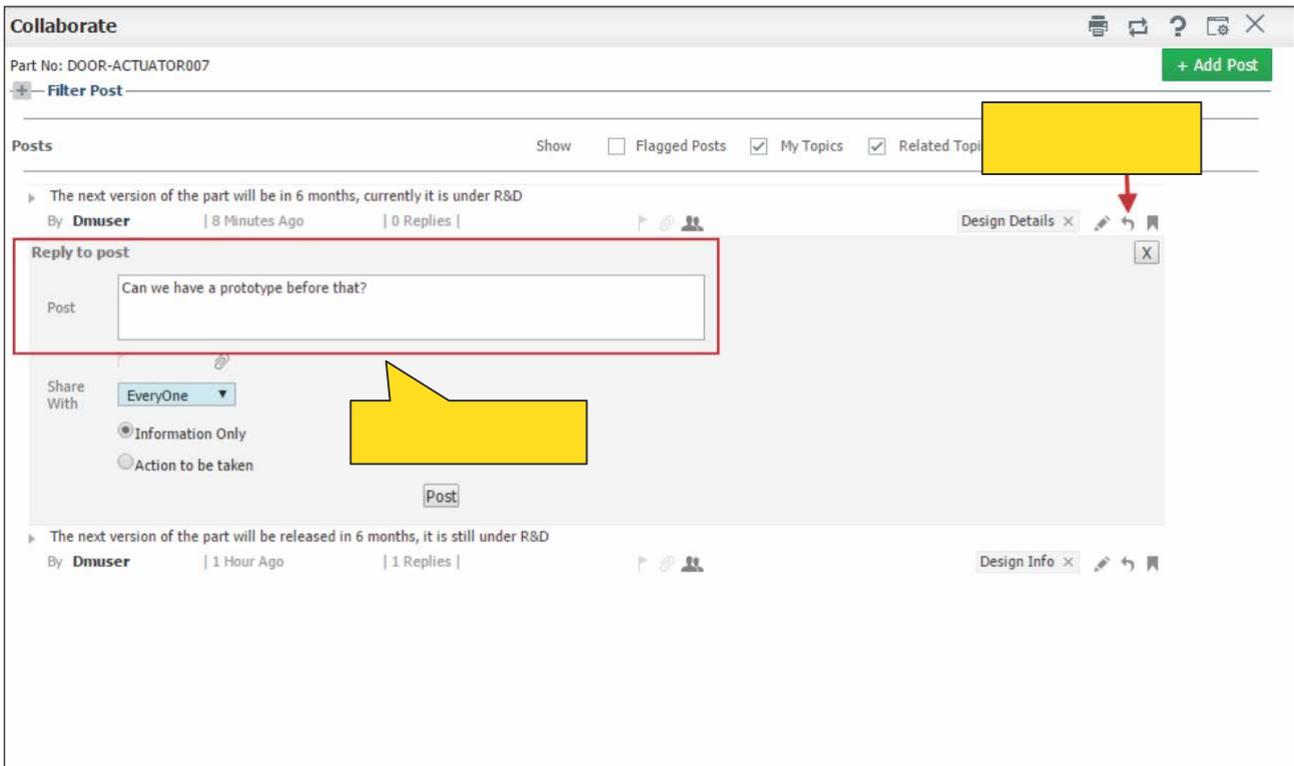
Figure 2.8 Replying to a post

2. Enter a reply in the **Post** field.

3. Click **Post**.

2.2.7 HOW TO EDIT A TOPIC

You have the option to edit a post and post it again.

1. Select the ✎ icon. The **Edit Post** group box appears. *See Figure 2.9*.
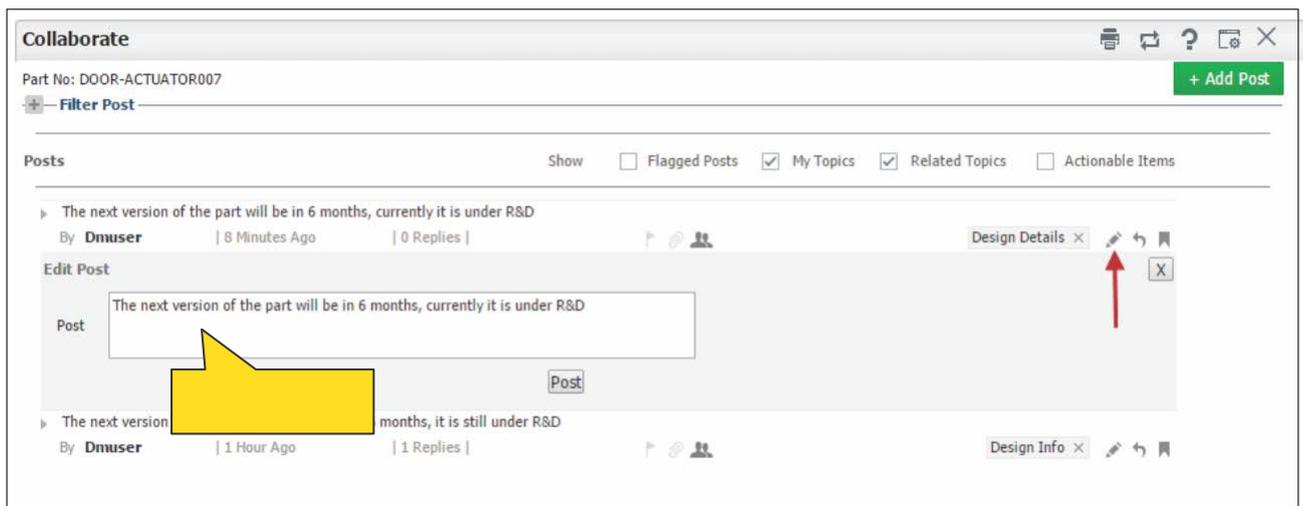
Figure 2.9 Editing a topic

2. Modify the message in the **Post** field.

3. Click **Post**

2.2.8   HOW TO REOPEN A TOPIC

You have the provision to reopen an already closed topic if you wish to continue the discussion. User can reopen a topic if a need arises to continue the closed discussions. Once the topic is reopened, messages can be posted in this topic.

1. Select ☒ icon alongside the post which you wish to reopen. The system displays the option "**Do you want to reopen the topic**?" *See Figure 2.10*.
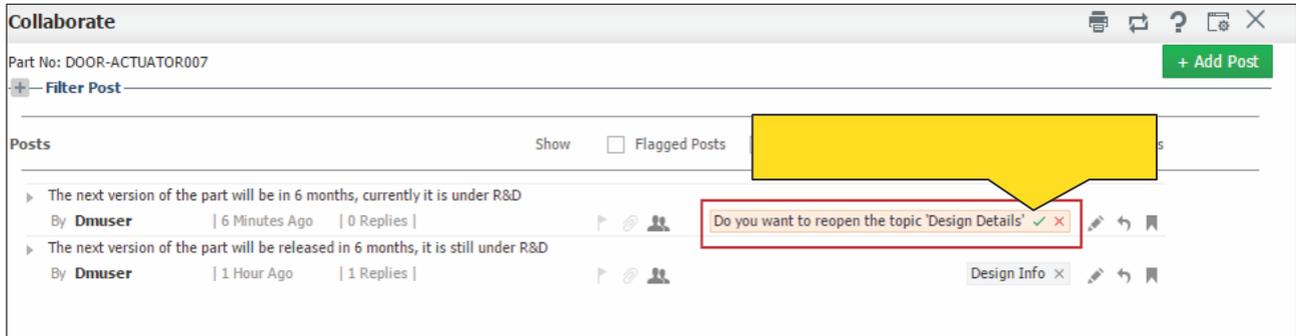
Figure 2.10 Creating formula

2. Select the ✔ message to reopen the topic again.

2.2.9   TO CLOSE A TOPIC

You also have the provision to close a topic once discussions on a topic has been logically concluded. Once the topic is closed, you can no longer post messages in that particular topic. However, the already posted messages can be viewed.

1. Select ☒ icon alongside the post which you wish to reopen. The system displays the option "**Do you want to close the topic**?" *See Figure 2.11*.
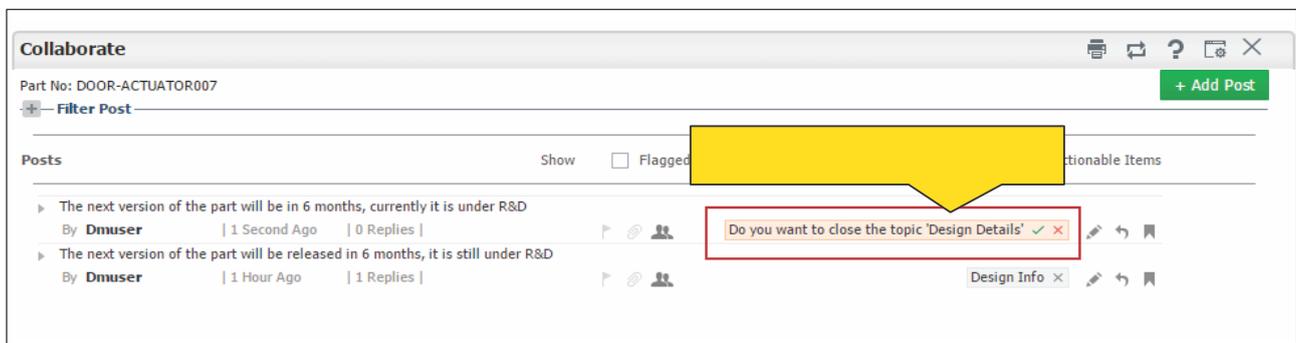
Figure 2.11 Creating formula

2. Select the ☒ message to close the topic again.

> ✎   *Note: Collaborate feature can be used only when Chrysalis is enabled.*

> ✎   *Note: Inbox integration will be covered in the next phase.*

3. Select the ☒ message to close the topic again

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APPENDIX A: COLLABORATOR

The Collaborator feature is provided as a bubble (image) inside the ⊞ 'Smart Bar' in various screens. Below is the list of screens in which Collaborator is included.

| Component	Activity	UI
Heli Charter Contracts	Manage Heli Charter Contracts	Manage Heli Charter Contracts
Shop Work Order	Plan Work Order	Plan Work Order
Shop Work Order	Record Shop Execution Details	Record Shop Execution Details
Engineering Advice Note	Process Engg Service Request	Create Advice Note
Engineering Advice Note	Revise Engg Advice Note	Revise Engg Advice Note
Flight Billing	Manage Flight Invoice Release	Manage Flight Invoice Release
Customer Part Exchanges	Initiate Exchange / Swaps	Manage Exchange Order
Stock Issue	Create Maintenance Issue	Create Issue
Stock Issue	Create Unplanned Issue	Create Unplanned Issue
Stock Issue	Record Direct Shipping Note	Record Shipping Note
Stock Issue	Record Shipping Details	Record Shipping Details
Stock Issue	Edit Issue	Edit Issue
Stock Issue	Edit / Confirm Shipping Note	Edit / Confirm Shipping Note
Stock Issue	Edit Unplanned Issue	Edit Unplanned Issue
Stock Issue	Record Hazmat Compliance	Record Hazmat Compliance
Stock Issue	View Hazmat Compliance	View Hazmat Compliance
Stock Issue	View Issue	View Issue Details
Stock Issue	View Issue	View Shipping Details
Stock Issue	View Shipping Note	View Shipping Note
Material Request	Create Material Request	Create Material Request
Material Request	Authorize Material Request	Authorize Material Request
Material Request	Edit Material Request	Edit Material Request
Material Request	View Material Request	View Material Request
Part Administration	Create Parts Main Information	Create Part Main Information
Part Administration	Edit Main Information	Edit Main Information
Part Administration	Edit Service Main Information	Edit Service Main Information
Part Administration	View Parts Information	View Parts Information
Part Administration	View Service Main Information	View Service Main Information
Stock Receipt	Create Stock Transfer Receipt	Create Stock Transfer Receipt
Stock Receipt	Create Unplanned Receipt	Create Unplanned Receipt
Stock Receipt	Record Material Lost in Transit	Record Materials Lost in Transit
Stock Receipt	Edit Stock Transfer Receipt	Edit Stock Transfer Receipt
Stock Receipt	Edit Unplanned Receipt	Edit Unplanned Receipt

Stock Receipt	Record Stock Transfer receipt	Record Stock Transfer Receipt
Stock Receipt	View Stock Transfer Receipt	View Stock Transfer Receipt
Stock Receipt	View Unplanned Receipt	View Unplanned Receipts
Stock Return	Create General Return	Create General Return
Stock Return	Create Unplanned Return	Create Unplanned Return
Stock Return	Create Maintenance Return	Issue wise Returns
Stock Return	Edit Return	Edit Material Return
Stock Return	Edit Unplanned Return	Edit Unplanned Return
Stock Return	View Return	View Material Return
Storage Administration	Create Warehouse Information	Create Warehouse Information
Storage Administration	Edit Warehouse Information	Edit Warehouse Information
Storage Administration	View Warehouse Information	View Warehouse Information
Stock Transfer	Manage Intra Warehouse Stock Transfer56	Manage Intra Warehouse Stock Transfer56
Stock Transfer	Create Inter Warehouse Stock Transfer	Create Inter Warehouse Stock
Stock Transfer	Edit Inter Warehouse Stock Transfer	Edit Inter Warehouse Stock Transfer
Stock Transfer	View Inter Warehouse Stock Transfer	View Inter Warehouse Stock
Unified Goods Receipt	Manage Goods Receipt	Manage Goods Receipt
Work Monitoring and	Record Work Estimates	Edit Work Estimates
Work Monitoring and Control	Review Work Execution and Report Actuals	Review Work Execution and Report Actuals
Engineering Service Request	Create Engineering Service Request	Create Engg. Service Request
Engineering Service Request	Edit Engineering Service Request	Edit Engg. Service Request
Engineering Service Request	Inquire Engg. Service Request Status	View Engg. Service Request
Engineering Order	Manage Engineering Order	Manage Engineering Order
Maintenance Task	Create Task	Create Task Information
Maintenance Task	Authorize Task	Authorize Tasks
Maintenance Task	Edit Task	Edit Task Information
Work Center	Edit Work Center	Edit Work Center Information
Work Center	View Work Center	View Work Center Information
Accounts Payable Hub	AP Invoicing Hub	AP Invoicing Hub
Supplier Debit Credit Note	Create Account Based Note	Create Account Based Note
Supplier Debit Credit Note	Create Item Based Note	Create Item Based Note
Supplier Debit Credit Note	Authorize Debit/Credit Note	Authorize Account Based Note
Supplier Debit Credit Note	Authorize Debit/Credit Note	Authorize Item Based Note
Supplier Debit Credit Note	Hold/Release Debit/Credit Note	Hold/Release Account Based Note
Supplier Debit Credit Note	Hold/Release Debit/Credit Note	Hold/Release Item Based Note

Supplier Debit Credit Note	Edit Debit/Credit Note	Edit Account Based Note
Supplier Debit Credit Note	Edit Debit/Credit Note	Edit Item Based Note
Supplier Debit Credit Note	Reverse Debit/Credit Note	Reverse Debit/Credit Note
Supplier Debit Credit Note	View Debit/Credit Note	View Account Based Note
Supplier Debit Credit Note	View Debit/Credit Note	View Item Based Note
Supplier Direct Invoice	Create Expense Invoice	Create Expense Invoice
Supplier Direct Invoice	Create Item Invoice	Create Item Invoice
Supplier Direct Invoice	Authorize Invoice	Authorize Expense Invoice
Supplier Direct Invoice	Authorize Invoice	Authorize Item Invoice
Supplier Direct Invoice	Edit Expense Invoice	Edit Expense Invoice
Supplier Direct Invoice	Edit Item Invoice	Edit Item Invoice
Supplier Direct Invoice	Reverse Invoice	Reverse Invoice
Supplier Direct Invoice	View Invoice	View Expense Invoice
Supplier Direct Invoice	View Invoice	View Item Invoice
Supplier Order Based Invoice	Maintain Invoice	Maintain Invoice
Supplier Order Based Invoice	Create Delivery Charges Invoice	Create Delivery Charges Invoice
Supplier Order Based Invoice	Edit Delivery Charges Invoice	Edit Delivery Charges Invoice
Supplier Order Based Invoice	Match Invoice	Match Invoice
Supplier Order Based Invoice	Reverse Invoice	Reverse Invoice
Supplier Order Based Invoice	View Invoice	View Delivery Charges Invoice
Supplier Order Based Invoice	View Invoice (New)	View Order Based Invoice
Purchase Order	Create Purchase Order	Create Purchase Order
Purchase Order	PR Based PO	PR Based PO
Purchase Order	Amend Purchase Order	Amend Purchase Order
Purchase Order	Cancel / Edit Purchase Order	Edit Purchase Order
Purchase Order	Maintain Supplier Correspondence	Maintain Supplier Correspondence
Purchase Order	View Purchase Order	View PO-PR Coverage
Purchase Requisition	Create Purchase Request	Create Purchase Request
Purchase Requisition	Cancel / Edit Purchase Request	Edit Purchase Request
Purchase Requisition	View Purchase Request	View Purchase Request
Repair Order	Create Repair Order	Create Repair Order
Repair Order	Amend Repair Order	Amend Repair Order
Repair Order	Amend Repair Order	Amend Quotes
Repair Order	Record Quotation	Record Quotes
Repair Order	Edit Repair Order	Edit Repair Order
Repair Order	View Repair Order	View Repair Order
Repair Order	View Repair Order	View Quotes

Supplier	Register Supplier	Register Supplier
Customer Service Invoice	Generate Customer Service Invoice	Manage Customer Service Invoice
Customer Service Invoice	Manage Direct Pre-payment Invoice	Manage Invoice
Customer Service Invoice	Edit Invoice	Edit Invoice
Customer Service Invoice	Reverse Invoice	Reverse Invoice
Customer Service Invoice	View Invoice	View Invoice
Customer Debit Credit Note	Create Account Based Note	Create Account Based Note
Customer Debit Credit Note	Create Item Based Note	Create Item Based Note
Customer Debit Credit Note	Authorize Debit/Credit Note	Authorize Account Based Note
Customer Debit Credit Note	Authorize Debit/Credit Note	Authorize Item Based Note
Customer Debit Credit Note	Hold/Release Debit/Credit Note	Hold/Release Account Based Note
Customer Debit Credit Note	Hold/Release Debit/Credit Note	Hold/Release Document Based Note
Customer Debit Credit Note	Edit Debit/Credit Note	Edit Account Based Note
Customer Debit Credit Note	Edit Debit/Credit Note	Edit Item Based Note
Customer Debit Credit Note	View Debit/Credit Note	View Account Based Note
Customer Debit Credit Note	View Debit/Credit Note	View Item Based Note
Customer Direct Invoice	Create Direct Invoice	Create Invoice[CDIAddInvMain]
Customer Direct Invoice	Create Packslip Invoice	Create Invoice[CDIAddInvPSMain]
Customer Direct Invoice	Create Miscellaneous Invoice	Create Invoice[CDIAddMsInvMain]
Customer Direct Invoice	Authorize Invoice	Authorize Invoice[CDIAuInvAdl]
Customer Direct Invoice	Authorize Invoice	Authorize Invoice[CDIAuthInvAdl]
Customer Direct Invoice	Authorize Invoice	Authorize Invoice[CDIAuthMsInv]
Customer Direct Invoice	Hold/Release Invoice	Hold/Release Invoice
Customer Direct Invoice	Edit Direct Invoice	Edit Invoice[CDIMntInvMain]
Customer Direct Invoice	Edit Packslip Invoice	Edit Invoice[CDIMntInvPSMain]
Customer Direct Invoice	Edit Miscellaneous Invoice	Edit Invoice[CDIMntMsInvMain]
Customer Direct Invoice	Reverse Invoice	Reverse Invoice
Customer Direct Invoice	View Invoice	View Direct Invoice
Customer Receipt	Create Receipt	Create Receipt
Customer Receipt	Authorize Receipt	Authorize Receipt
Customer Receipt	Hold/Release Receipt	Hold/Release Receipt
Customer Receipt	Edit Receipt	Edit Receipt
Customer Receipt	Reverse Receipt	Reverse Receipt
Customer Receipt	View Receipt	View Receipt
Pack Slip	Create Pack Slip	Create Pack Slip
Pack Slip	Allocate Material for Pack Slip	Allocate Materials for Pack Slip
Pack Slip	Issue Materials for Pack Slip	Issue Pack Slip

Pack Slip	View Pack Slip	View Pack Slip
Sale Contract	Record Sale Contract	Manage Sale Contract
Customer Service Order	Create Customer Order	Manage Customer Order
Customer Service Order	Orders in Progress	Customer Orders in Progress
Customer Service Order	Customer Supplied Parts List	Record Customer Supplied Parts List
Initiate Invoice	Process Invoice	Process Invoices
Sale Quotation	Record Sale Quotation	Manage Sale Quotation
Sale Quotation	Approve - Sale Quotation	Record Rejection
Customer	Create Customer Record	Create Customer Record
Customer	Edit Customer Main Information	Edit Customer Main Information
Customer	View Customer Record	View Customer Record
Part Price List 5.5	Manage Part Pricelist 55	Manage Part Pricelist 55
Service Price List 5.5	Manage Service Pricelist 55	Manage Service Pricelist 55

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