

RELY - LocalPOB Management

Vodafone 18 December 2018



LocalPOB Management

This module will be used for provisioning, changes and de-provisioning of LocalPOB in the portal.

Roles

Accountant Controller

Menu

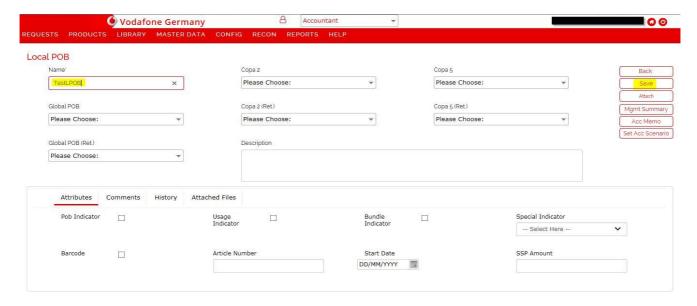
Library -> Local POB

Creation

Typically Accountant can create Local POB. All mandatory fields will be marked with red asterisk (*).

Validations

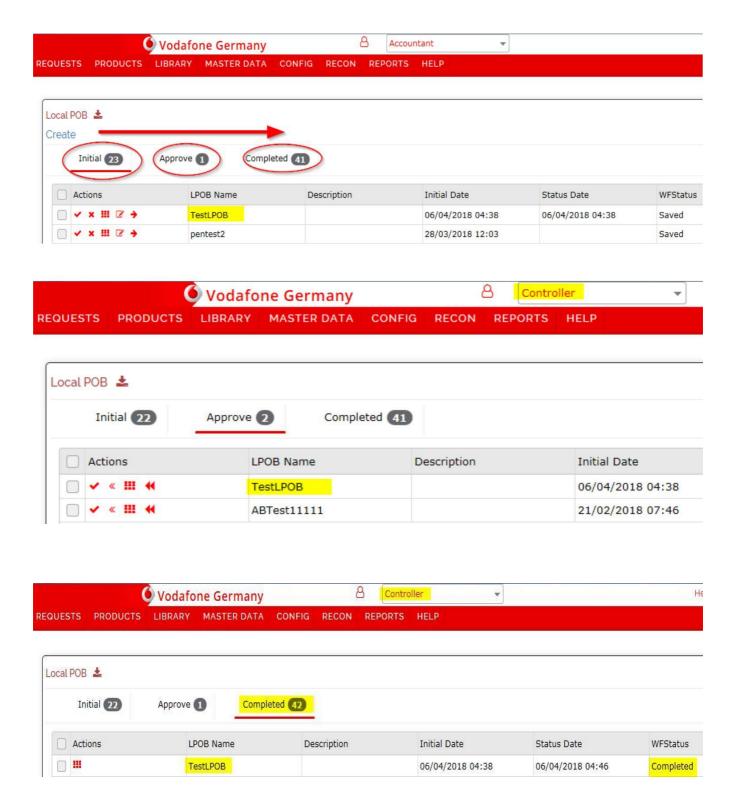
- 1) Single Local POB cannot have multiple roles simultaneously
- 2) Same Name cannot be used for two Local POB





Approval

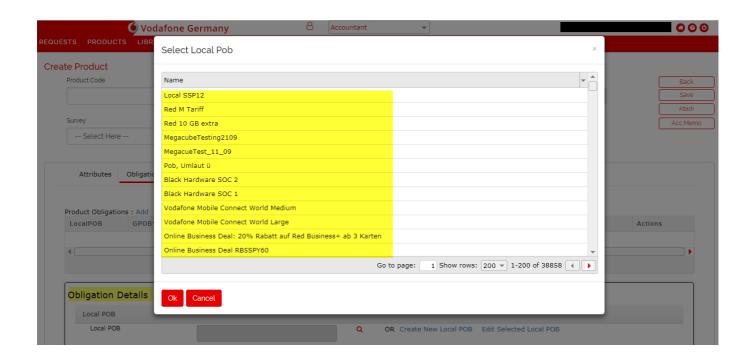
A Local POB created by Accountant will be go through 2 cycles of approval (Accountant, Controller). All Local POB need to be approved by Controller in Approve Step for successful creation.





Once the workflow of either request or product is finished and the object contains local pob attached to it (either normal completion (final approval) or abrupt end (Reject, Withdraw etc)), the Local POB will appear in the 'Completed' tab of the workflow. If a Local POB is successfully approved, the Local POB is marked 'Active' in the system. All active or non-active Local POB can be edited.

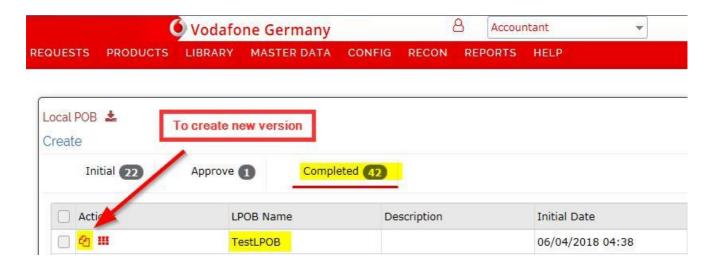
Once LocalPOB Completed it will be available in LocalPob dropdown on product create page



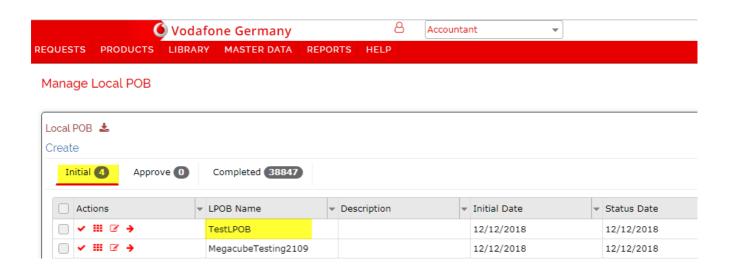


Versioning in Local POB

Accountant can create a new version of Completed Local POB from Completed Step



New Version is available in Initial Step-





Important Actions

Depending upon the workflow and your role in that workflow, you will be presented with appropriate Actions (that you can take on that request).

Here's the list of most common "Actions" and their behaviour

Submit(): You can approve the Local POB using this action. Upon click, it moves the Local POB to the next available role in the workflow. If you were the last role, it moves the Local POB to 'Completed' tab with 'Completed' status.

Cancel(X): You can reject the Local POB using this action. Upon click, the Local POB is immediately taken out of the workflow.

Withdraw(): If you do not want the current owner to further process your Local POB, you can bring back to your tab by using this Action. You can then take "Edit" Action to make changes or "Reject" it altogether.

Review(:: This Action lets you view detailed information of the request in read-only more. It also presents you with relevant Actions at the bottom on the form for you to take further actions (like Approve, Reject, Cancel etc)

Edit(): This Action lets you to change information on the request while it travels through the approval workflow. If a requested has completed the workflow, you can edit the entity in the Initial Step.

Reject (**(**): If you need any clarification or want product to make some changes to the Local POB, you can send it back to requester (with your comments) using this Action.

Download(): Use this action to download any uploaded files or supporting documents attached to the Local POB.

Duplicate (): Use this action to create duplicate Local POB.