RELY – Request Management

Request Management

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

Roles

`
Accountant
Controller
Lead Account
Business Unit Manager

Menu

Request -> PPM

Type

Typically Accountant can create three type of Request

1)'PPM' Requests

2)'Contract' Requests

3)'Remedy' Requests

Creation

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

Request Name can be of Two types as stated below-

1) Request Creation with Normal Request name (Can be any set of characters)

2) Request Creation with # in Request Name

Both "Name" and "Authorization#" fields accept the special character "#" that will be replaced by the next sequential internal Request ID. For example, a request named "Ad-hoc #" will result in "Ad-hoc 123" in case the internal ID ends up being 123. A request where the field 'Authorization Num' is set to "A#" will become "A123" in case such request has the internal ID 123.

Request Creation from different ways

1) Create Request with on Fly Product and LocalPob

Click on Create New Product link to add product on Fly, User will be redirected to 'Product Creation page'.

Click on Add to add LocalPob on Fly, One can either create a new local pob using 'Create New Local POB' link or can directly select from pre-existing POB's using the Searchbox.

Click 'Create New LocalPob' to create LocalPob on Fly

Attach Created local pob from Localpob searchbox on Product Create Page and Add it into Product Obligation Grid

Obligation Details

Local POB

Local POB	Test 🔍 OR Create New Local POB Edit Selected Local POB

Name	Test	Type	Finance	Description	null
GPob		Copa2		Copa5	
GPob(Ret)		Copa2		Copa5	

[Collapse]   **Add to Grid**

After Attaching localpob save product , Product will add in Products Grid on Request page-

Attributes   **Obligations**   Comments   History   Attached Files   Request   Product History   Recon

Product Obligations : Add

LocalPOB	GPOB1	COPA2	COPA5	GPOB2	COPA2	COPA5	Actions
Test							Edit Delete

Save Request

Edit Request

Vodafone Germany   Accountant

REQUESTS   PRODUCTS   LIBRARY   MASTER DATA   CONFIG   RECON   REPORTS   HELP

Name'	Authorization#	System
Request352		PPM

Description

Buttons: Back, Save, Attach, Add Mgmt Summary, Add Acc Memo, Set Acc Scenario, Acc Scn Matrix, Submit ✔, Cancel ✖, Set Completed ➜

Attributes   Product POB   Comments   History   Attached Files

Products : Please Choose: **Add to Grid**   OR   Create New Product

Product Code	Name	Actions
A-2	A	Edit Delete

Validations

1) Single Request cannot have multiple roles simultaneously
2) Same Name cannot be used for two Requests.

A 'PPM' Request created by Accountant will be go through 3 cycles of approval (Preparation, Review, Approval L1).

All users need to be approved by Controller in Approval L1 Step for successful creation. Approved request sits in Completed status under 'Approval L2 tab'.

A 'Remedy Request created by Accountant will be go through 4 cycles of approval (Accountant, Lead Account, Controller, Business Unit Manager).

All Requests need to be approved by Business Unit Manager in Business Unit Manager Step for successful creation. Approved request sits in Completed status under 'Completed tab'.

Once Request gets Completed attached Products and LocalPob which was created on fly with Request will be available in their respective WF

Once the workflow is finished (either normal completion (final approval) or abrupt end (Reject, Withdraw etc)), the Request will appear in the 'Completed' tab of the workflow. If a Request is successfully approved, the Request is marked 'Active' in the system. All active Requests can be edited.

Versioning in Request

Accountant can create a new version of Completed Request from Completed Step

New Version is available in Accountant 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 request using this action. Upon click, it moves the request to the next available role in the workflow. If you were the last role, it moves the request to 'Completed' tab with 'Completed' status.

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

Withdraw(↩): If you do not want the current owner to further process your request, 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 requester to make some changes to the request, 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 request.

Duplicate(⧉): Use this action to create duplicate Request.