RELY – Product Management

Product Management

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

Roles

Accountant
Controller

Menu

Products -> Manage

Creation

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

Validations

1) Single Product cannot have multiple roles simultaneously
2) Same Name cannot be used for two Product
3) Product Code and System Category cannot be same for two Product

Product Creation from different ways

1) Create Product without product Obligations.

2.)Create product with product obligations.

Click 'Create New LocalPob' to create LocalPob on Fly

Add Newly Ceated Localpob from LocalPOB Dropdown on Product page and add it into Grid

Approval

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

Once Product in Completed step on fly localpob also available in Completed Step of Localpob WF

Local POB ⬇

Create

	Actions	LPOB Name	Description	CreatedDateTime	UpdatedDateTime	WFStatus
☐	⬆ ⊞	Localpob2002		20/02/2018 07:51	20/02/2018 07:51	Completed
☐	⬆ ⊞	Localpobtest20022018		20/02/2018 07:01	20/02/2018 07:01	Completed
☐	⬆ ⊞	Test1LPOB		20/02/2018 06:02	20/02/2018 06:02	Completed
☐	⬆ ⊞	MC_Test0023		19/02/2018 08:31	19/02/2018 08:31	Completed
☐	⬆ ⊞	Revenue Germany		12/02/2018 01:31	12/02/2018 01:31	Completed
☐	⬆ ⊞	LPOB-02-02B	Descr LPOB-02-02B 2	02/02/2018 04:40	02/02/2018 04:41	Completed
☐	⬆ ⊞	LPOB-AP-0202		02/02/2018 04:13	02/02/2018 04:13	Completed
☐	⬆ ⊞	LocalpobNew11		11/01/2018 08:11	11/01/2018 08:11	Completed

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

Versioning in Product

Accountant can create a new version of Completed Product 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 product 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 product using this action. Upon click, the product 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 product 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 product.

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