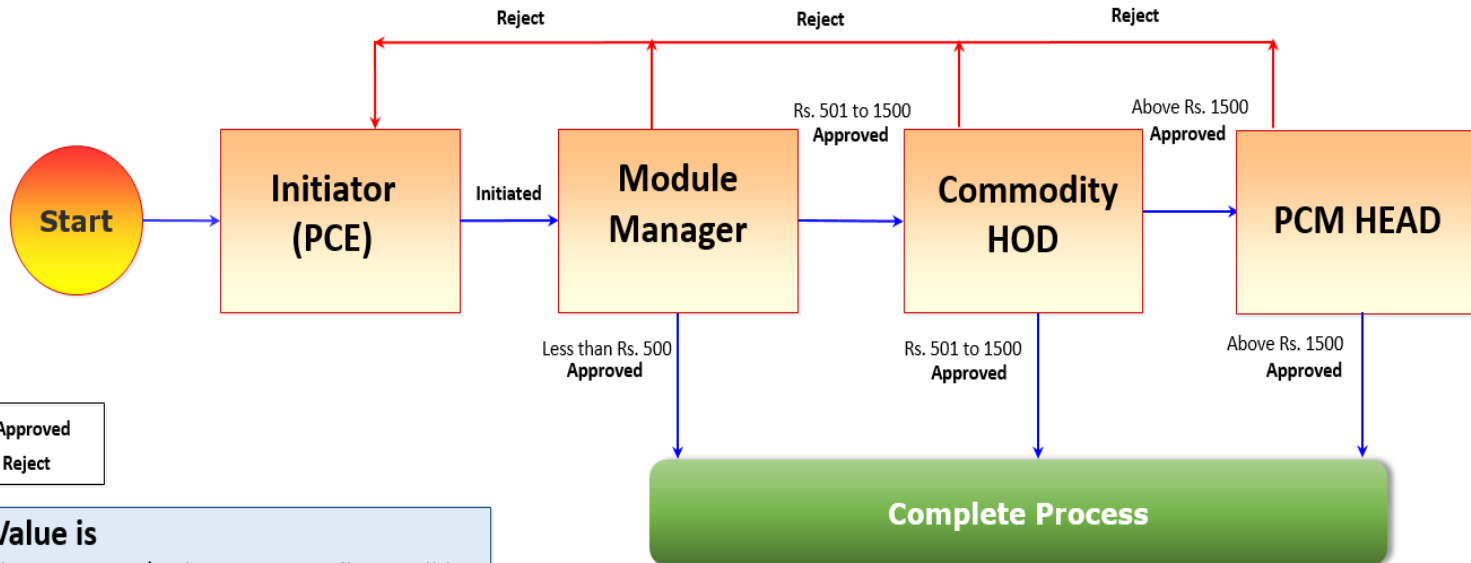


SBC APPROVAL PROCESS

SBC APPROVAL PROCESS

Workflow:

SBC APPROVAL PROCESS WORKFLOW



If SBC Value is

1. Less than Rs. 500/- then process flow will be Upto module manager.
2. Rs. 501 to 1500 – Upto commodity HOD.
3. Greater than Rs. 1500 - Upto PCM head.

If anyone rejects then task goes to Initiator where if initiator submits the task then process starts from first stakeholder.

Snap1 – Workflow

- New Icon named as “**SBC APPROVAL PROCESS**” need to be developed.
- On opening “**SBC APPROVAL PROCESS**” icon, there will be 3 options :
 - A. Initiation - (Should be visible to **Initiator only**)
 - B. My inbox – (Should be visible to **Approvers and Initiators**)
 - C. Search screen - (Should be visible to **Approvers and Initiators**)

SBC APPROVAL PROCESS

1: Initiation.

- Initiation screen consists of below parameters.
- 1. **Request ID -**
 - a. Auto generate after Saving or Initiation.
 - b. Format- FY19-AD-0001
- 2. **Initiation Date -**
 - a. Auto generate after Initiation.
- 3. **Sector –**
 - a. Dropdown selection.
 - b. In dropdown list, currently “AD, FD, MTWD, MTBD, ME & POWEROL” will be available.
 - c. Mandatory
- 4. **SBC Value -**
 - a. Manual entry.
 - b. Type – Number.
 - c. Mandatory
 - d. In Background, user selection logic will be:
 - 1. “Below 500” then ‘Module Manager’ will appear.
 - 2. “501 to 1500” then ‘Module Manager’ and ‘Commodity HOD’ will appear.
 - 3. “Above 1500” then ‘Module Manager’, ‘Commodity HOD’ and ‘PCM Head’ will appear.

Note - Stakeholder names should appear as per mapping. Here Initiator will not select any stakeholder names. Each initiator will be mapped with specific ‘Module Manager’, ‘Commodity HOD’ and ‘PCM Head’.

Against every initiator, single ‘Module Manager’, ‘Commodity HOD’ and ‘PCM Head’ should able to map.
- 5. **Business Case Value**
 - a. Manual entry.
 - b. Type – Number.
 - c. Mandatory
- 6. **Project -**
 - a. Dropdown selection.
 - b. Dropdown list will be provided later.
 - c. In dropdown list, ‘Others’ option will be there. If selected, then provide provision to enter text. Label will be ‘Please Specify’.
 - d. Mandatory.
- 7. **Part Description –**
 - a. Manual entry.
 - b. Type – Text.
 - c. Mandatory
 - d. Limit - 200
- 8. **Remarks -**
 - a. Manual entry.

SBC APPROVAL PROCESS

- b. Type – Text.
- c. Characters Count limit – 1000
- d. Mandatory
- 9. **Document GroupBox -**
 - a. Column 1 – Document Name
 - b. Column 2 - Uploaded By (Format: Token - Name)
 - c. Column 3 – Uploaded On
- 10. **Part Number –**
 - a. Manual entry.
 - b. Type – Text.
 - c. Characters Count limit – 50
 - d. Mandatory
- 11. **Approvers -**
 - 1. “Below 500” then ‘Module Manager’ will appear.
 - 2. “501 to 1500” then ‘Module Manager’ and ‘Commodity HOD’ will appear.
 - 3. “Above 1500” then ‘Module Manager’, ‘Commodity HOD’ and ‘PCM Head’ will appear.

Note - Stakeholder names should appear as per mapping. Here Initiator will not select any stakeholder names. Each initiator will be mapped with specific ‘Module Manager’, ‘Commodity HOD’ and ‘PCM Head’.

Against every initiator, single ‘Module Manager’, ‘Commodity HOD’ and ‘PCM Head’ should able to map.

 - Initiator can Save or Submit.
 - Initiator can able to upload documents (one document is Mandatory). Notification for validation will be “**Please upload SBC working file/PPT**”.
 - Initiation Screen view will be as per below snap.

SBC APPROVAL PROCESS

My Inbox

Search

Initiation

SBC APPROVAL PROCESS

Initiation screen

Details

Request ID

Initiation Date

Sector

--Select--

SBC Value

Business Case Value

Project

--Select--

Part Number

Part Description

Remarks

Document

Choose File

	Document Name	Uploaded By	Uploaded On
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

Module Manager

1234567 - LADE VISHAL

Commodity HOD

1234567 - LADE VISHAL

PCM Head

1234567 - LADE VISHAL

Save

Submit

Snap2 – Initiation Screen

2: Module Manager (First Stakeholder)

- After initiation, System generated task mail will be generated to 'Module Manager'. Mail Format is given below.
- 'Module Manager' can able to see search screen and my inbox if clicks on main icon available on home page of Cordys.
- 'Module Manager' task screen will be same as like initiation screen except approver names (addition will be workflow history and seek clarification history).
- 'Module Manager' should NOT able to edit any data.
- Can able to access task from mail and also from customized My Inbox option of SBC Approval Process.
- Can ask for **seek clarification**.
- Can enter **Remarks**. Non mandatory.

SBC APPROVAL PROCESS

- Can able to view already uploaded documents and can upload new documents.
- Can able to **reject** (Remarks Mandatory) – If Rejects then task will go back to initiator with main process status as “**Rejected**” where initiator has following options.
 1. Able to edit all data.
 2. Will have ‘Submit’ button.
 3. On Submitting, flow starts from first stakeholder.
- Can able to “**Approve**” the task. On **Approving**, system will trigger task to next stage along with task mail notification.

Task Mail

From: Initiator Name
Sent: 21 March 2019 PM 11:01
To: Stage1 Task Owner
Subject: Request ID | Task | SBC For Review

Dear Sir/Madam ,

SBC submitted for your Approval.

Workflow History:

Please open below link to open the Process Task.

[Click here:](#)

Snap3 – Mail

Task Screen

SBC APPROVAL PROCESS

My Inbox

Search

Initiation

SBC APPROVAL PROCESS

Approval Screen

Details

Request ID

Initiation Date

Sector

--Select--

SBC Value

Business Case Value

Project

--Select--

Part Number

Part Description

Remarks

Document

Choose File

	Document Name	Uploaded By	Uploaded On
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

Rev - 00

Approve

Reject

Seek Clarification

Snap4 - Task Screen

2: Commodity HOD (Second Stakeholder)

- System generated task mail will be generated to 'Commodity HOD'. Mail Format is given below.
- 'Commodity HOD' can able to see search screen and my inbox if clicks on main icon available on home page of Cordys.
- 'Commodity HOD' task screen will be same as like initiation screen except approver names (addition will be workflow history and seek clarification history).
- "Commodity HOD" should NOT able to edit any data.
- Can able to access task from mail and also from customized My Inbox option of SBC Approval Process.
- Can ask for **seek clarification**.
- Can enter **Remarks**. Non Mandatory
- Can able to view already uploaded documents and can upload new documents.

SBC APPROVAL PROCESS

- Can able to **reject** (Remarks Mandatory) – If Rejects then task will go back to initiator with main process status as “**Rejected**” where initiator has following options.
 1. Able to edit all data.
 2. Will have ‘Submit’ button.
 3. On Submitting, flow starts from first stakeholder.
- Can able to “**Approve**” the task. On **Approving**, system will trigger task to next stage along with task mail notification On **Approving**, system will trigger task to next stage along with task mail notification.

Task Mail

From: Stage1 Owner Name
Sent: 21 March 2019 PM 11:01
To: Stage2 Task Owner
Subject: Request ID | Task | SBC For Review

Dear Sir/Madam ,

SBC submitted for your Approval.

Workflow History: [Click to open the Process Task.](#)

Please open below link to open the Process Task.

[Click here:](#)

Snap5 - Mail

SBC APPROVAL PROCESS

Task Screen

Details Rev - 00

Request ID Initiation Date Sector

SBC Value Business Case Value Project

Part Number Part Description Remarks

Document

	Document Name	Uploaded By	Uploaded On
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

Snap6 - Task Screen

3: PCM Head (Third Stakeholder)

- System generated task mail will be generated to 'PCM Head'. Mail Format is given below.
- 'PCM Head' can able to see search screen and my inbox if clicks on main icon available on home page of Cordys.
- 'PCM Head' task screen will be same as like initiation screen except approver names (addition will be workflow history and seek clarification history).
- "PCM Head" should NOT able to edit any data.

SBC APPROVAL PROCESS

- Can able to access task from mail and also from customized My Inbox option of SBC Approval Process.
- Can ask for **seek clarification**.
- Can enter **Remarks**. Non Mandatory
- Can able to view already uploaded documents and can upload new documents.
- Can able to **reject** (Remarks Mandatory) – If Rejects then task will go back to initiator with main process status as “**Rejected**” where initiator has following options.
 1. Able to edit all data.
 2. Will have ‘Submit’ button.
 3. On Submitting, flow starts from first stakeholder.
- Can able to “**Approve**” the task. **Process gets complete**.

Task Mail

From: Stage2 Owner Name
Sent: 21 March 2019 PM 11:01
To: Stage3 Task Owner
Subject: Request ID | Task | SBC For Review

Dear Sir/Madam ,

SBC submitted for your Approval.

Workflow History: [Click to open the Process Task](#)



Please open below link to open the Process Task.

[Click here:](#)

Snap7 – Mail

SBC APPROVAL PROCESS

Task Screen

My Inbox

Search

Initiation

SBC APPROVAL PROCESS

Approval Screen

Details

Request ID

Initiation Date

Sector

SBC Value

Business Case Value

Project

Part Number

Part Description

Remarks

Rev - 00

Document

Choose File

Document Name

Uploaded By

Uploaded On

Approve

Reject

Seek Clarification

Snap8 - Task Screen

After completing flow from last stakeholder, Notification Mail will be sent to Initiator and in CC all acted stakeholders. Notification mail format is given below.

Completed Notification Mail

SBC APPROVAL PROCESS

From: Last Stage Owner Name
Sent: 21 March 2019 PM 11:01
To: Initiator
CC: All Acted Approvers
Subject: Request ID | Notification | SBC Completed

Dear Sir/Madam ,

SBC approval process completed. Now approved SBC can be submitted for VOB.

Workflow History:



Please open below link to view the details of SBC.

[Click here:](#)

Snap9 – Mail

4: If any stakeholder rejects the task, then rejected mail notification will be as per below.

From: Stage Owner Name
Sent: 21 March 2019 PM 11:01
To: Initiator
CC: All Acted Approvers
Subject: Request ID | Notification | SBC Rejected

Dear Sir/Madam ,

SBC Rejected.

Workflow History: [Click to open the Process Task](#)



Please open below link to view the details of SBC.

[Click here:](#)

Snap10 – Mail

SBC APPROVAL PROCESS

5: If any stakeholder approves the task, then Approved mail notification will be as per below.

From: Stage Owner Name
Sent: 21 March 2019 PM 11:01
To: Initiator
CC: All Acted Approvers
Subject: Request ID | Notification| SBC Approved

Dear Sir/Madam ,

Please note SBC FY19-AD-0001 “Part Description” has been approved by “Stakeholder Name”.

Workflow History:



Please open below link to view the details of SBC.

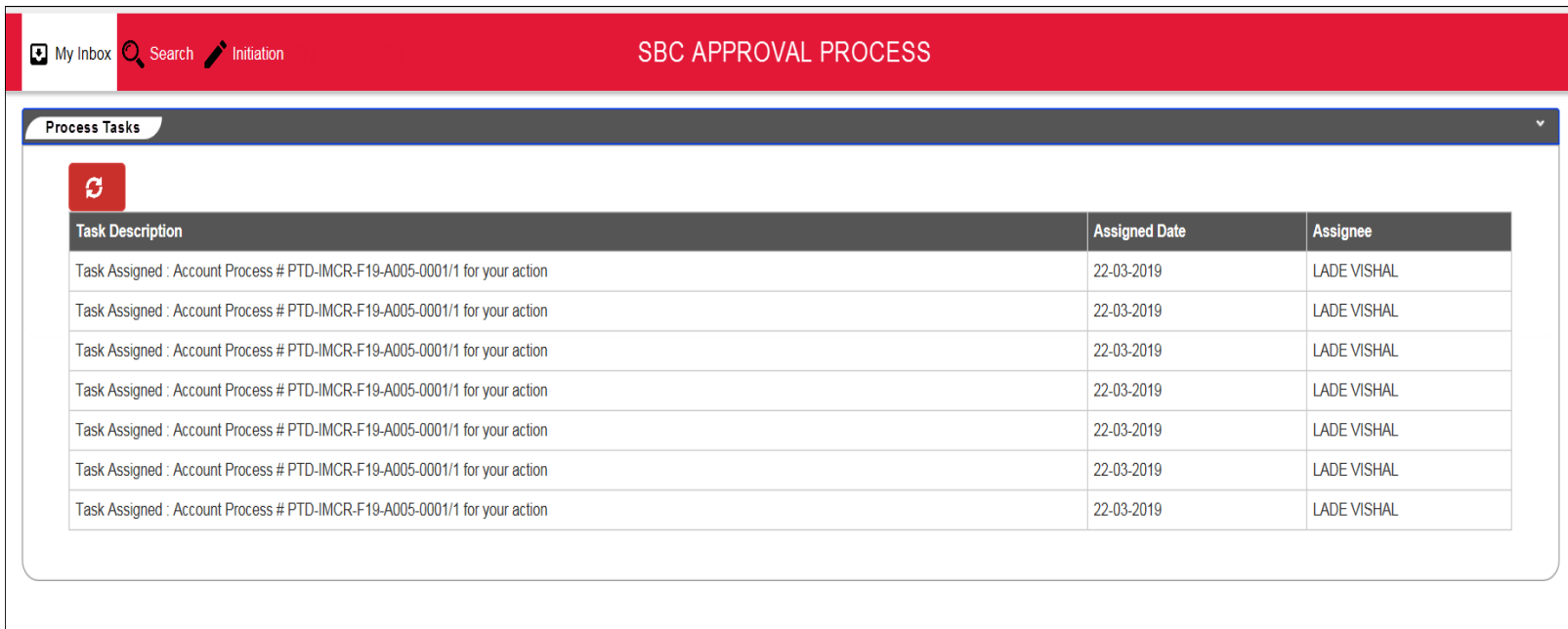
[Click here:](#)

Snap11 – Mail

Note: Yellow highlighted should be content of the Part Description.

SBC APPROVAL PROCESS

6: After Clicking on main icon below screen should appear.

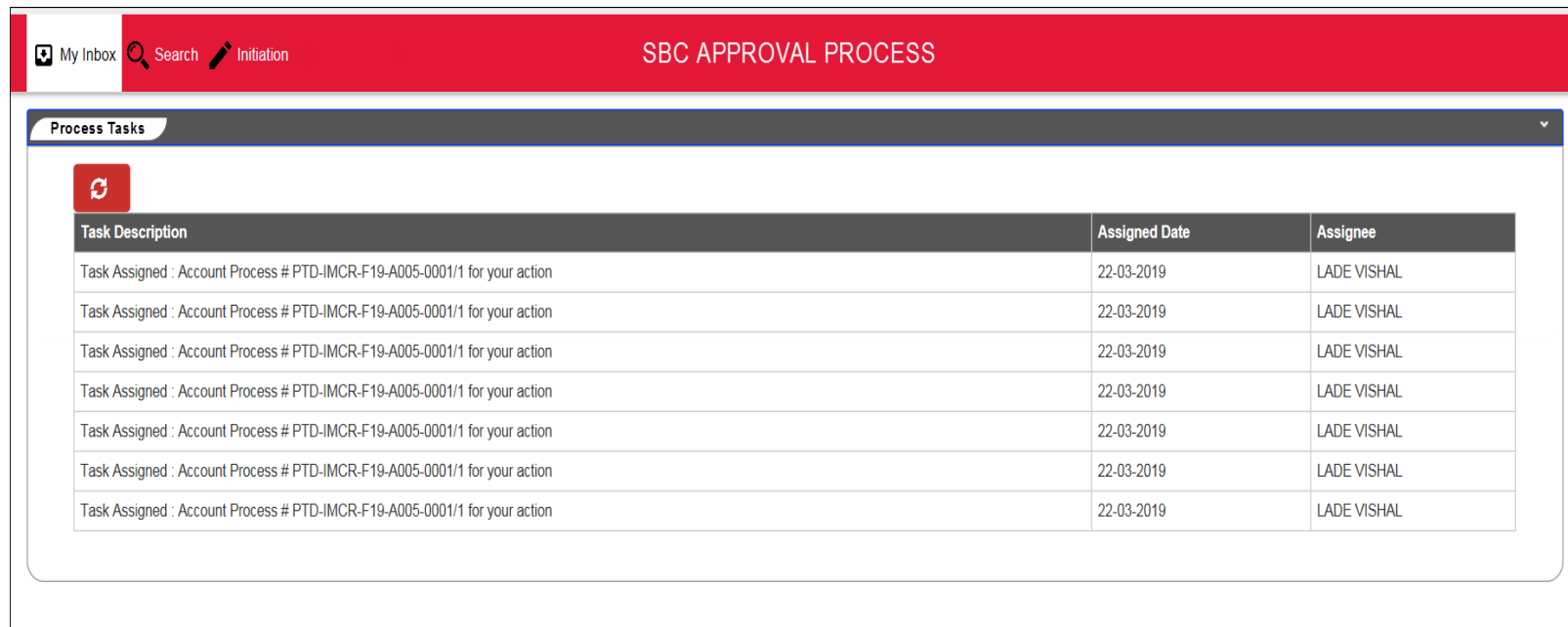


The screenshot shows the 'SBC APPROVAL PROCESS' screen. At the top, there is a red header bar with 'My Inbox', 'Search', and 'Initiation' icons on the left, and 'SBC APPROVAL PROCESS' in the center. Below the header is a 'Process Tasks' section with a dropdown arrow. Inside this section, there is a red square icon with a white circular arrow. Below the icon is a table with three columns: 'Task Description', 'Assigned Date', and 'Assignee'.

Task Description	Assigned Date	Assignee
Task Assigned : Account Process # PTD-IMCR-F19-A005-0001/1 for your action	22-03-2019	LADE VISHAL
Task Assigned : Account Process # PTD-IMCR-F19-A005-0001/1 for your action	22-03-2019	LADE VISHAL
Task Assigned : Account Process # PTD-IMCR-F19-A005-0001/1 for your action	22-03-2019	LADE VISHAL
Task Assigned : Account Process # PTD-IMCR-F19-A005-0001/1 for your action	22-03-2019	LADE VISHAL
Task Assigned : Account Process # PTD-IMCR-F19-A005-0001/1 for your action	22-03-2019	LADE VISHAL
Task Assigned : Account Process # PTD-IMCR-F19-A005-0001/1 for your action	22-03-2019	LADE VISHAL
Task Assigned : Account Process # PTD-IMCR-F19-A005-0001/1 for your action	22-03-2019	LADE VISHAL

Snap12 – Process Home Screen

7: Inbox (Task Description - Task Assigned: SBC Approval # FY19-AD-0001 for your Action)



The screenshot shows the 'SBC APPROVAL PROCESS' screen. At the top, there is a red header bar with 'My Inbox', 'Search', and 'Initiation' icons on the left, and 'SBC APPROVAL PROCESS' in the center. Below the header is a 'Process Tasks' section with a dropdown arrow. Inside this section, there is a red square icon with a white circular arrow. Below the icon is a table with three columns: 'Task Description', 'Assigned Date', and 'Assignee'.

Task Description	Assigned Date	Assignee
Task Assigned : Account Process # PTD-IMCR-F19-A005-0001/1 for your action	22-03-2019	LADE VISHAL
Task Assigned : Account Process # PTD-IMCR-F19-A005-0001/1 for your action	22-03-2019	LADE VISHAL
Task Assigned : Account Process # PTD-IMCR-F19-A005-0001/1 for your action	22-03-2019	LADE VISHAL
Task Assigned : Account Process # PTD-IMCR-F19-A005-0001/1 for your action	22-03-2019	LADE VISHAL
Task Assigned : Account Process # PTD-IMCR-F19-A005-0001/1 for your action	22-03-2019	LADE VISHAL
Task Assigned : Account Process # PTD-IMCR-F19-A005-0001/1 for your action	22-03-2019	LADE VISHAL
Task Assigned : Account Process # PTD-IMCR-F19-A005-0001/1 for your action	22-03-2019	LADE VISHAL

Snap 13 - Inbox

SBC APPROVAL PROCESS

8: Search Screen – Process Search (This Process search should be visible to initiators and Approvers)

My Inbox

Search

Initiation

SBC APPROVAL PROCESS

Process Search

Saved Search

Filter

Request ID

Sector

--Select--

SBC Value

--Select--

Project

--Select--

Part Description

Part Number

Status

--Select--

Initiator

Initiated From

Initiated To

Current Holder

Search

Clear

Export To Excel

PDF

Revise

No. of Records:0

<<

<

>

>>

Page 1 of 0

	Request ID	Sector	SBC Value	Business Case Value	Project	Part Number	Part Description	Initiator	Initiated On	Current Stage	Current Holder	Status	Revision
<													

Snap 14 – Process Search

Note – A. All filters and columns of Process search are available in above snap.

B. In SBC value filter, dropdown will be 'Below 500', '501 to 1500' and 'Above 1500'.

SBC APPROVAL PROCESS

9: Search Screen – Saved Search (This Saved search should be visible to initiators only)

The screenshot shows the 'Product Supply Management (PSM)' interface. At the top, there's a navigation bar with 'My Inbox', 'Search', and 'Initiation'. Below this, a red banner displays 'Product Supply Management (PSM)'. A sidebar on the left has tabs for 'Process Search' and 'Saved Search'. The main area features a 'Filter' dropdown menu with a search input field for 'Request ID' and 'Search'/'Clear' buttons. To the right, there are 'Delete' and 'Export To Excel' buttons, and a 'No. of Records:0' indicator with pagination controls. Below these is a table with columns: Request ID, Sector, SBC Value, Business Case Value, Project, Part Number, Part Description, and Saved Date. The table is currently empty, showing 'Page 1 of 0'.

Snap 15 – Saved Search

Note - All filters and columns of Saved search are available in above snap.

10: Need to provide Revise option in search screen.

- At the start, Revision will be 00.
- At the second, Revision will be 01.
- In Revision initiation screen, keep all the data except documents and workflow.

11: Need to develop admin screen where user can able to map Approval matrix. Each initiator will be mapped with specific 'Module Manager', 'Commodity HOD' and 'PCM Head'. Against every initiator, single 'Module Manager', 'Commodity HOD' and 'PCM Head' should able to map. Create Separate role for this.

12. Need to create Admin Role.

Thank you