RE Workflow Management – Not Templatized

System Requirements Specifications

13-Oct-2025

Version 1.0

Contents

1 System Overview & Problem Statement

The **Workflow Management System – Non-Templatized** is a **strategic digital initiative** aimed at bringing **structure, traceability, and efficiency** to approval-based processes within **Royal Enfield (RE)**.

Currently, most approvals and related communications are handled through **emails**, which often results in:

- **Unstructured and fragmented approval chains**
- **Loss of critical information** due to scattered email threads
- **Lack of visibility** on approval status and ownership
- **No defined Turnaround Time (TAT)**, leading to delays and open-ended tasks

These challenges collectively reduce **process transparency**, **accountability**, and **decision efficiency** across teams.

The proposed **Workflow Management System – Non-Templatized** will address these issues by providing a **centralized, intuitive platform** where:

- Users can **create requests**,
- Define **custom approval hierarchies**,
- Set and monitor **TATs**, and
- Track **real-time progress** and **final outcomes**.

All workflows will be **captured, organized, and closed** within a single system of record — ensuring **clarity, control, and compliance** throughout the process.

A thoughtfully designed **User Interface (UI)** will further enhance **usability, adoption, and productivity**, ensuring smooth navigation and a clean experience across departments.

2 Use case examples

The following are some **illustrative use cases** for the **Workflow Management System – Non-Templatized**. These examples represent common approval scenarios within the organization, though additional use cases may be added over time as business needs evolve:

1. **Approval for a new office location** – involving multiple stakeholders such as facilities, finance, and leadership teams.

2. **Approval of unbudgeted incentives** – requiring justification and review from HR and finance departments.
3. **Sponsorship or participation in an event** – covering approvals from marketing, branding, and finance.
4. **Purchase of material from a new vendor** – requiring validation, procurement, and financial approvals.

These examples demonstrate the system's flexibility to handle a wide range of approval workflows across departments.

3 Intended Audience

The **Workflow Management System – Non-Templatized** will be accessible to **all Royal Enfield (RE) employees** who have valid **SSO (Single Sign-On)** credentials.

Initially, the system will be introduced in a **pilot environment** for selected users and departments. Based on feedback and performance, it will later be **rolled out organization-wide**.

The system will involve the following **user roles**:

1. **Initiator** – The user who creates and submits a workflow request.
2. **Participants** – Individuals involved in the workflow at different stages or approval levels.
3. **Final Approver** – The ultimate authority responsible for approving or rejecting the workflow request.
4. **Consultation** – A user or subject matter expert whom the **Final Approver** may consult before making a final decision.
5. **Spectators** – Users who are invited to **view the workflow** for information or transparency purposes, similar to how individuals are **copied (CC'd)** on email communications.

This defined role structure ensures **clarity, accountability, and collaboration** throughout the workflow lifecycle.

4 HiFi Wireframe,Goals and Expected Outcomes

Hi-Fi Wireframe: https://sway-dense-03017508.figma.site

The **Workflow Management System – Non-Templatized** is designed with a user-centric approach, supported by a **high-fidelity (Hi-Fi) wireframe** that visually represents the layout, navigation flow, and user interactions.

Through the implementation of this system, **Royal Enfield (RE)** aims to achieve the following **measurable goals**:

1. **Centralization:** Consolidate all approval workflows and related communications within a single unified platform.
2. **Transparency:** Provide real-time visibility into each workflow's stage, status, and assigned approvers.
3. **Accountability:** Define clear ownership at every stage and maintain a complete audit trail of all user actions.
4. **Efficiency:** Reduce approval cycle times by implementing **TAT-based tracking**, **automated reminders**, and **smart notifications**.
5. **Traceability:** Maintain structured and retrievable records of all approvals to support easy reference, audit, and reporting.
6. **Scalability:** Enable flexible configuration of **non-templatized workflows** that can adapt to various departmental and business needs.
7. **User Experience:** Deliver a **clean, intuitive, and responsive interface** that enhances usability and encourages regular adoption.

5 Definitions and Acronyms

Term	Definition
Workflow	A sequence of tasks, approvals, or activities linked to a business process.
Non-Templatized	A flexible structure where each workflow can be created dynamically without a fixed format.
Admin	System user with full privileges.

6 Flow of Application

This section describes the **end-to-end flow** of the Workflow Management – Non-Templatized application. It outlines how users interact with the system, how approvals move through different stages, and how data transitions between modules until final closure.

6.1 High-Level Flow

1. **Login (SSO Integration)**
   - Users access the system via the **RE SSO Bridge** using their organizational credentials.
   - Upon successful authentication, users are redirected to the **Dashboard**.
2. **Dashboard & Navigation**

   - The **Dashboard** provides a summary of pending, approved, and rejected requests.
   - The left **Side Menu** gives access to *My Requests*, *Open Requests*, *Closed Requests*, and *Raise New Request*.
3. **Creating a New Request**
   - User clicks **"Raise New Request"** and chooses between:
     - **Custom Request** – Create a flexible, non-templatized workflow.
     - **Existing Template** – (Future scope) Use a predefined structure.
   - The user proceeds through a **6-step wizard**:
     - Template Selection
     - Basic Information
     - Approval Workflow
     - Participants & Access
     - Documents & Attachments
     - Review & Submit
4. **Defining Approval Workflow**
   - The user configures **approval levels dynamically**, assigning approvers via **@ tagging**.
   - Each approver level has a **defined TAT (in hours or days)**.
   - System calculates the **total TAT** by summing all levels.
   - **TAT starts** only when a request reaches that approver's level.
5. **Adding Participants**
   - User can add **Spectators** (view-only participants) who can comment but not approve.
   - Spectators receive **notifications** and see the request in read-only mode.
6. **Uploading Documents**
   - User attaches **supporting files** (PDF, Word, Excel, PPT, or images) or links **Google Docs/Sheets**.
   - PDFs and images are **previewable**, while other formats can be **downloaded**.
7. **Submitting the Request**
   - The user reviews all information in the **Review & Submit** step.
   - Once submitted, the request enters the **Approval Workflow** and notifies the first approver.
8. **Approval Process**
   - Approvers receive a **notification** and can:
     - **Approve Request** – Moves to the next level or closes if final approver.
     - **Reject Request** – Sends remarks to the initiator and marks as closed.
   - Each action requires **comments and remarks** (mandatory).
   - **TAT tracking** is visible with color-coded status (Green = Within TAT, Yellow = Approaching Deadline, Red = Breached).
   - **Auto-reminders** are sent at configured thresholds (e.g., 80% TAT usage).
9. **Work Notes & Collaboration**
   - Participants communicate via the **Work Notes (Chat View)**.
   - Supports **@mentions, file sharing, and reactions**.

- All discussions are stored chronologically and linked to the request.

10. **Activity Tracking**
    - Every event — creation, comment, document upload, approval, rejection, or TAT alert — is captured in the **Activity Tab** with timestamps.
11. **Request Closure & Conclusion**
    - After final approval, the request returns to the **Initiator** with **AI-generated conclusion remarks**.
    - The initiator reviews, optionally edits, and **marks the request as closed**.
    - The **Conclusion Remark** summarizing the workflow becomes part of the final record and appears under:
        - **My Requests (Approved)**
        - **Open Requests**
        - **Closed Requests**
12. **Post-Closure Access & Sharing**
    - Closed requests remain accessible to all **participants and spectators**.
    - Requests can be shared internally via **Add Spectator**; **download permissions** apply only to Work Note attachments.
    - All actions and comments remain viewable for audit purposes.

7 System Features & Requirements

Here, we describe the **system features** along with their respective **Width** and **Depth** to provide complete visibility of each requirement.

The **Width** defines the **functional coverage** of a feature — outlining what the feature does, its **boundaries, use cases, and user interactions**. It answers the question: *"What scenarios and actions are covered by this feature?"*

The **Depth** captures the **operational and behavioral details** — describing how the feature behaves through its **logic, workflow, system responses, and edge-case handling**. It answers the question: *"How does the system execute and respond in these scenarios?"*

7.1 SSO Login

The system will integrate with the existing **RE SSO Bridge** to enable secure, seamless login for all authorized Royal Enfield employees. This ensures unified authentication, eliminating the need for separate credentials and maintaining compliance with RE's security standards.

Width:

- Integrates with the existing **RE SSO Bridge** for secure authentication.
- Allows access only to **authorized Royal Enfield employees**.
- Automatically retrieves user details (**name, employee ID, department**).

Depth:

- Uses **token-based authentication** and **HTTPS** for secure sessions.
- Handles **session timeout** and **re-authentication** per RE’s IT security policy.

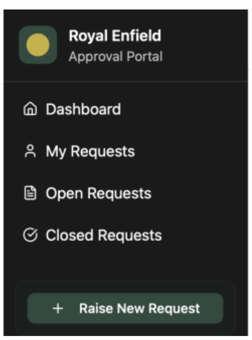
Dependency

- SSO implementation guide and sample users are required.

7.2 Dashboard

The **Dashboard** is an open element that is **currently under discussion** and will be finalized in later phases. It is expected to serve as a central view for users to monitor workflow status, pending approvals, and key metrics once its structure and content are defined.

7.3 Side Navigation Menu



The **Side Menu** provides users with quick and consistent navigation across the application. It includes the following primary sections:

- **Dashboard:** Overview of workflow activities, key metrics, and pending actions.
- **My Requests:** Displays all workflow requests created by the logged-in user.
- **Open Requests:** Lists all active or in-progress workflows requiring action. These may include requests **initiated by** or **assigned to** the logged-in user.
- **Closed Requests:** Shows all completed or approved workflows for reference. These may include requests **created by** or **processed by** the logged-in user.
- **Raise New Request:** Allows users to initiate and submit a new workflow request.

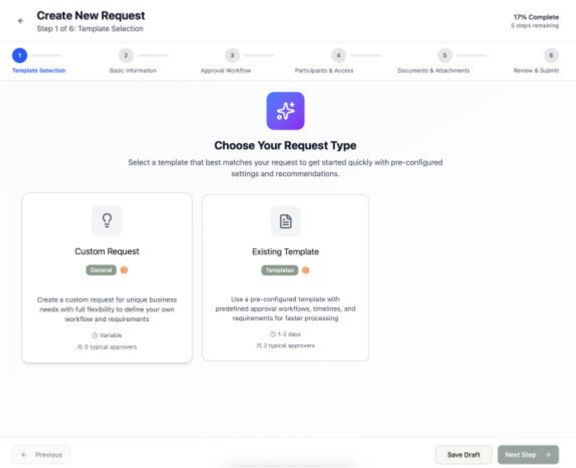
Width:

- Offers persistent navigation to **Dashboard**, **My Requests**, **Open Requests**, **Closed Requests**, and **Raise New Request**.
- Ensures consistent access throughout the system.

Depth:

- Implements **active route highlighting** and **role-based visibility**.
- Includes **search, sort, and filter** capabilities.
- Supports **pagination** and **stable ID-based navigation** to detail screens.

7.4 Create New Request – Template Selection



This screen appears when the user clicks **“Raise New Request.”** It introduces a **wizard-style navigation** that guides users through the request creation process in sequential steps.

Custom Request (Non Templatized): Allows users to create a fully flexible workflow tailored to unique business needs.

To initiate the request flow, users must select **“Custom Request.”** The system then progresses step by step to capture all required details, ensuring clarity and completeness before submission.

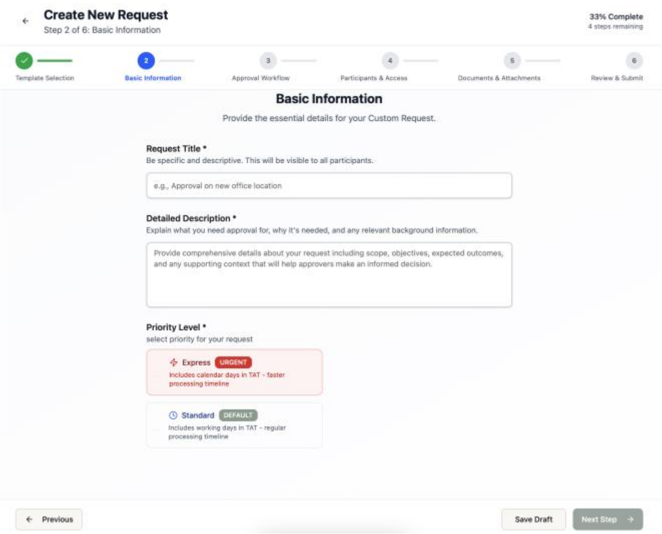
Width:

- Enables users to choose **Custom Request** (non-templatized)
- Displays **wizard navigation** with progress indicator.

Depth:

- In the current version, only **Custom Request** is enabled.
- Enforces **mandatory selection** before proceeding.
- Saves the chosen configuration as part of the workflow metadata.
- Activates after completion of wizard

7.5 Create New Request – Basic Information



In this step, users outline the **what, why, and how soon** of their request, creating clarity for all participants involved in the approval process.

Users are required to enter:

- **Request Title:** A short and descriptive title that summarizes the purpose of the request (e.g., *Approval for new office location*).
- **Detailed Description:** A comprehensive explanation outlining the need, background, and expected outcome of the request.
- **Priority Level:** Selection between two options —
  - **Express (Urgent):** Includes **calendar days** in the TAT for faster processing.
  - **Standard (Default):** Includes **working days** in the TAT for regular processing.

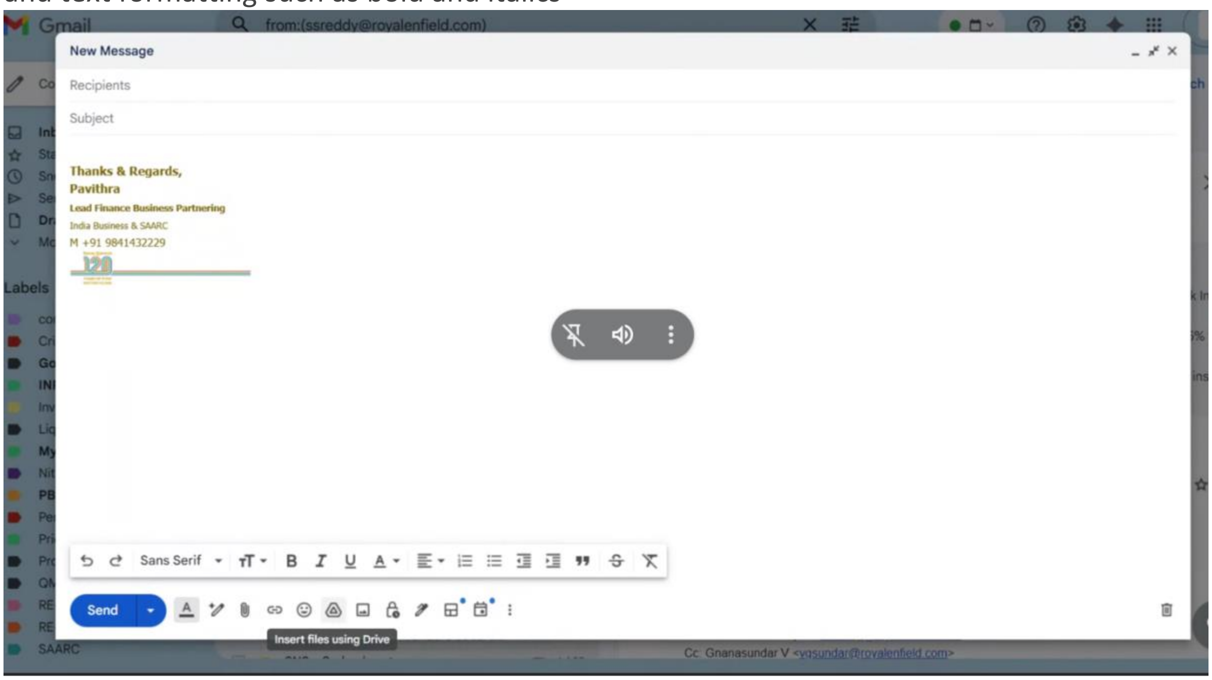
This step ensures that each request is well-defined, prioritized appropriately, and easily understood by all participants in the approval flow.

Width:

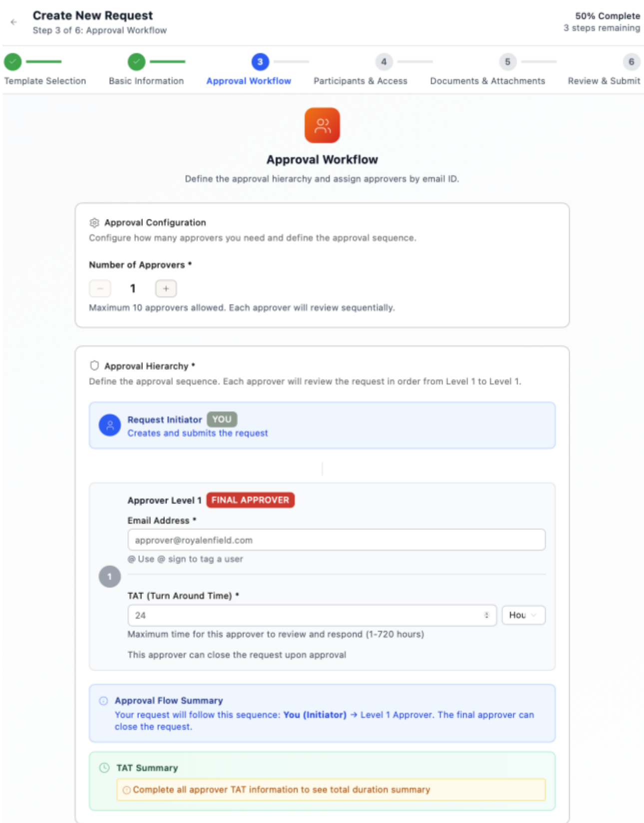
- Captures **core request details**:

  - **Request Title**
  - **Detailed Description**
  - **Priority Level** – *Express* or *Standard*

Depth:

- **Express:** Uses **calendar days** in TAT calculation.
- **Standard:** Uses **working days** (default).
- Supports **rich text formatting** and **pasted tables** for better clarity.
- Support comprehensive **email like formatting features**, including table insertion, links, and text formatting such as bold and italics
- 

7.6 Create New Request – Approval Workflow



In this step, users define the **approval hierarchy** and assign approvers for each level. The number of approvers is **dynamically configurable** based on the workflow's complexity, with a maximum of ten levels supported.

Each approver's **Turnaround Time (TAT)** must be defined individually in **hours or days**, depending on the urgency and scope of the request. The system automatically calculates the **overall TAT** by summing the TAT values of all approval levels.

An important behavior to note: the **TAT timer for each participant starts only when the request reaches that level**. Any delay at a previous level impacts only that approver's TAT and does not affect subsequent ones.

Approvers can be tagged using the **"@" symbol** for easy identification, and each level's configuration is summarized in real time under the **Approval Flow Summary** and **TAT Summary** sections for complete visibility. All the taggable users must be available in Active Directory (AD).

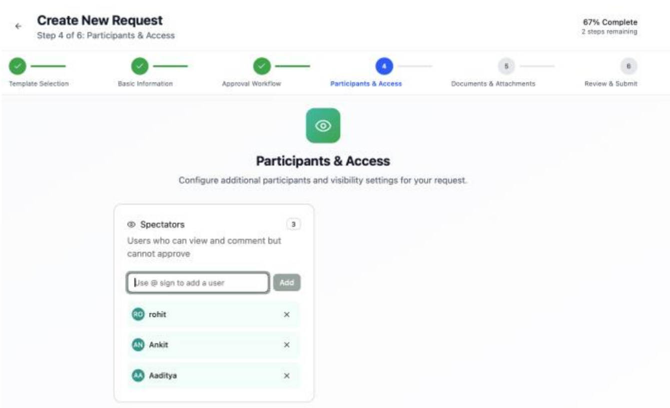
Width:

- Allows defining a **multi-level approval hierarchy** with dynamic levels (up to 10).
- Each level includes a **TAT (in hours or days)**.
- Approvers can be added using **@ tagging**.

Depth:

- System computes **overall TAT** by summing all levels.
- **TAT timer** starts only when a level becomes active — delays are isolated per level.
- Displays real-time **Approval Flow Summary** and **TAT Summary** for transparency.

7.7 Create New Request – Participants & Access



The system allows adding **Spectators** — users who can **view the workflow, add comments, and stay informed**, but **cannot approve or modify** the request. Spectators can be added using the **"@" tag**, ensuring relevant stakeholders remain in the loop throughout the approval process.

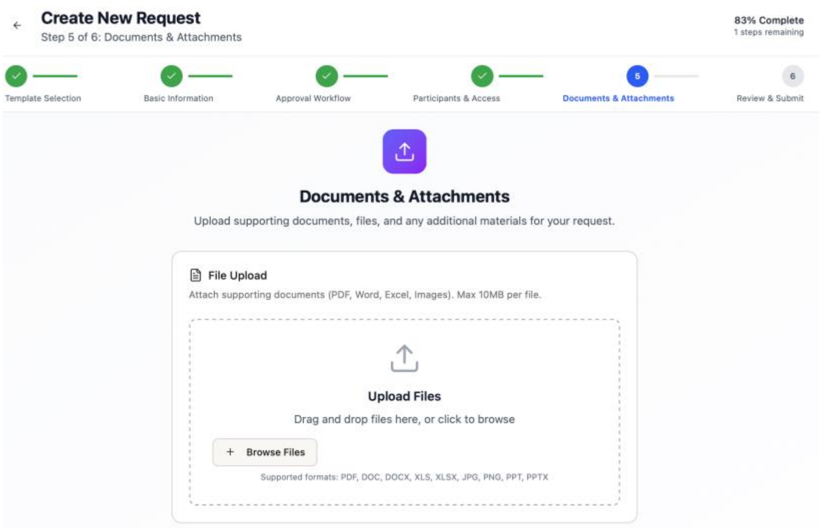
Width:

- Allows adding **Spectators** who can **view and comment** but cannot approve.
- Ensures **visibility** is restricted to participants and spectators only.

Depth:

- **@ tagging** used to add spectators easily.
- Spectators can add comments but have **no edit or approval privileges**.
- All changes are logged in the **audit trail**.

7.8 Create New Request – Documents & Attachments



In this step, users can upload **supporting documents and reference materials** required for the workflow request. The system supports file formats such as **PDF, Word, Excel, PowerPoint, and images**, with a maximum upload size of **10 MB per file**.

Users can **drag and drop** files directly into the upload area or use the **Browse Files** option to attach them.

- **PDF and image files** can be **previewed directly** within the system.
- Other formats such as **Word, Excel, or PowerPoint** must be **downloaded** to view.
- Additionally, users can associate **Google Docs** and **Google Sheets** links as part of the request for collaborative reference.

This feature ensures that all relevant documents are easily accessible and centralized for smoother review and approval.

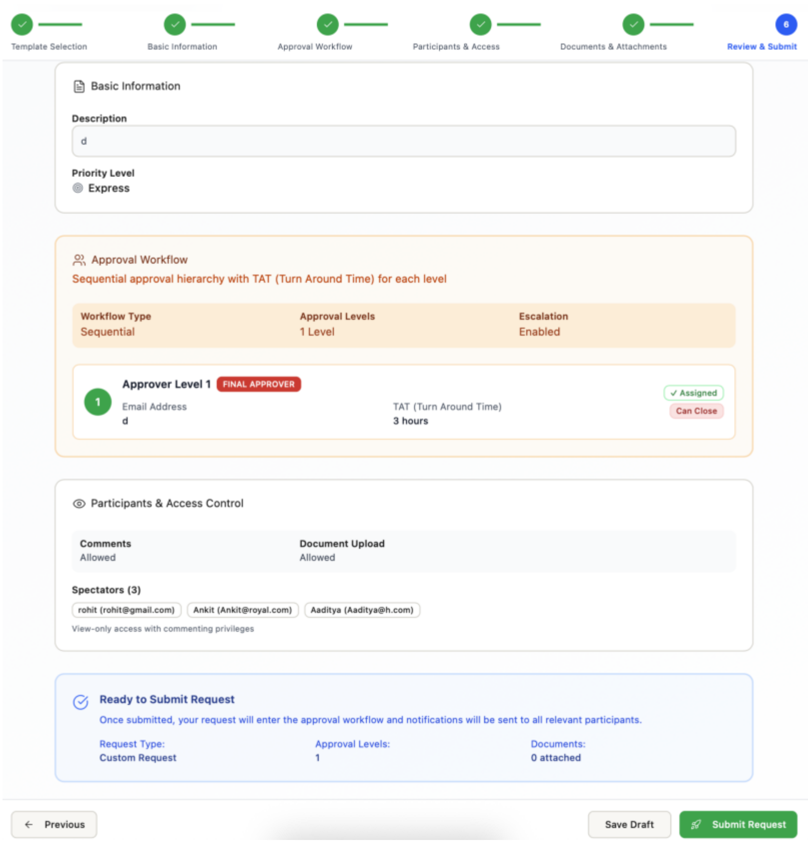
Width:

- Supports uploads of **PDF, Word, Excel, PowerPoint, and image** files (up to **10 MB each**).
- Allows linking of **Google Docs** and **Google Sheets**.

Depth:

- Provides **inline preview** for **PDFs and images**.
- Other formats must be **downloaded** to view.
- Stores **file metadata** (name, size, uploader, timestamp) for traceability.

7.9 Create New Request – Review & Submit



This is the final step before the request enters the approval cycle. Users can **review all captured details** and ensure the accuracy of every input. The screen provides a structured summary of:

- **Request Overview:** Displays key attributes such as **Request Type, Priority, Workflow Type,** and **Request Title**.
- **Basic Information:** Shows the request **description** and **priority level** entered earlier.
- **Approval Workflow:** Summarizes approval hierarchy, approvers, and defined **TAT** for each level.
- **Participants & Access Control:** Lists spectators, permissions, and comment settings.

After verification, the user can either **save the request as draft** or click **"Submit Request."** Once submitted, the workflow is activated, and **notifications are automatically triggered** to all assigned approvers and spectators.

This final step ensures each request is **validated, structured, and complete** before moving into execution.

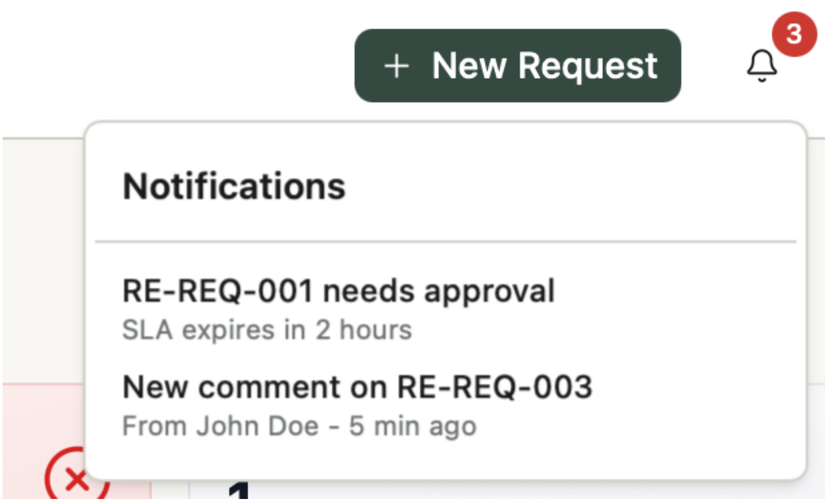
Width:

- Displays a **complete summary** of all entered details before submission:
    - **Request Overview**
    - **Basic Information**
    - **Approval Workflow**
    - **Participants & Access**
- Provides options to **Save as Draft** or **Submit Request**.

Depth:

- Performs **final validation** of all required fields.
- Computes **total TAT** and confirms approver hierarchy.
- Upon submission, sends **notifications** to approvers and spectators.

7.10Notifications



The system provides **real-time notifications** to keep users informed about workflow activities and pending actions. Notifications appear through a **bell icon** in the application header with a visible count of unread alerts.

Users receive updates such as:

- **Approval Reminders:** Alerts when a request requires action or when its **SLA/TAT is about to expire**.
- **Comments and Mentions:** Notifications when someone adds a comment or tags the user in a workflow discussion.

Each notification includes the **request ID, message, and timestamp**, allowing users to respond quickly and maintain timely workflow progress.

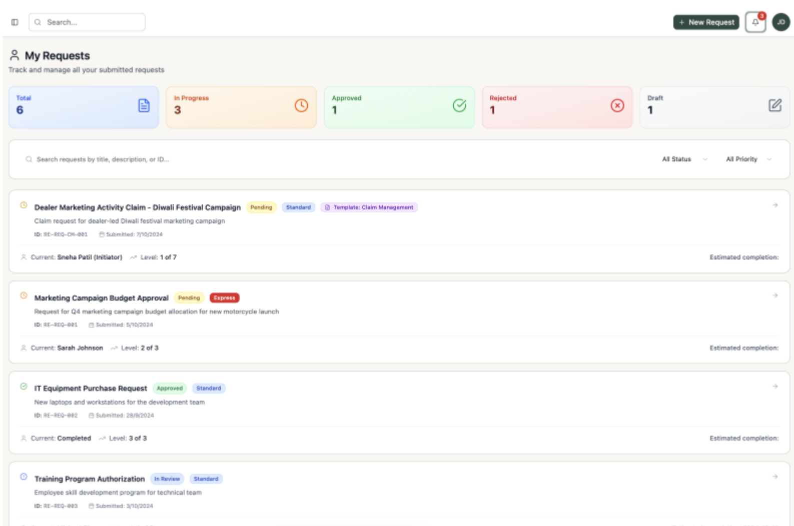
Width:

- Centralized **bell icon** for all system alerts with **unread count**.
- Covers events like:
  - **Approval assignments**
  - **SLA/TAT warnings**
  - **Comments or mentions**
  - **Status updates and closures**

Depth:

- Delivers **real-time in-app alerts** (optional email integration).
- Each alert includes **request ID, event type, user, and timestamp**.
- Supports **click navigation**, **read/unread states**, and **auto-cleanup** of old alerts.
- Highlights **high-priority** or **SLA-related** notifications distinctly.

7.11My Requests



This screen allows users to **view, track, and manage** all workflow requests they have created within the system. It provides a consolidated view of request status, type, and progress for easy monitoring.

Width:

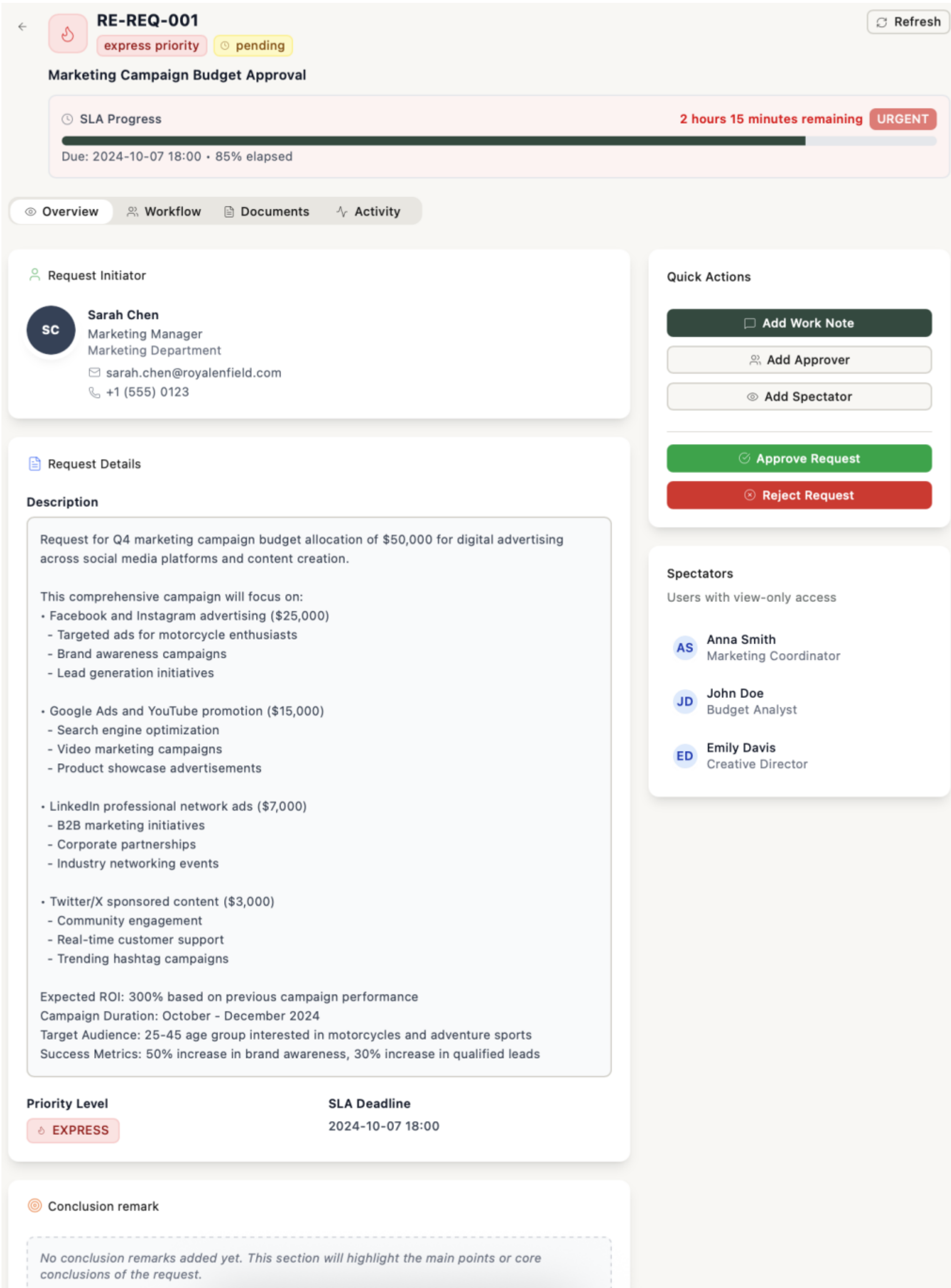
- Displays all **workflow requests submitted by the logged-in user**, categorized as **Total, In Progress, Approved, Rejected,** and **Draft.**

- Each record shows critical details like **Request Title, Priority (Express/Standard), Template Type, ID, Submission Date,** and **Current Level.**
- Includes **search** and **filter** options for **status** and **priority** to quickly locate specific requests.

Depth:

- Each request card provides **real-time tracking** of the **current approver**, **workflow level**, and **estimated completion date.**
- Supports **click navigation** to open the detailed workflow view.
- Uses **color-coded indicators** for status identification (e.g., green for Approved, red for Rejected, yellow for Pending).
- Data refreshes upon page load when new requests are created or status updates occur, ensuring users always see the latest information.

7.12Request Detail View



This screen allows users to **view, review, and act on individual workflow requests**. It consolidates all key information — request details, approver actions, documents, and activity logs — into a single, interactive view for efficient decision-making.

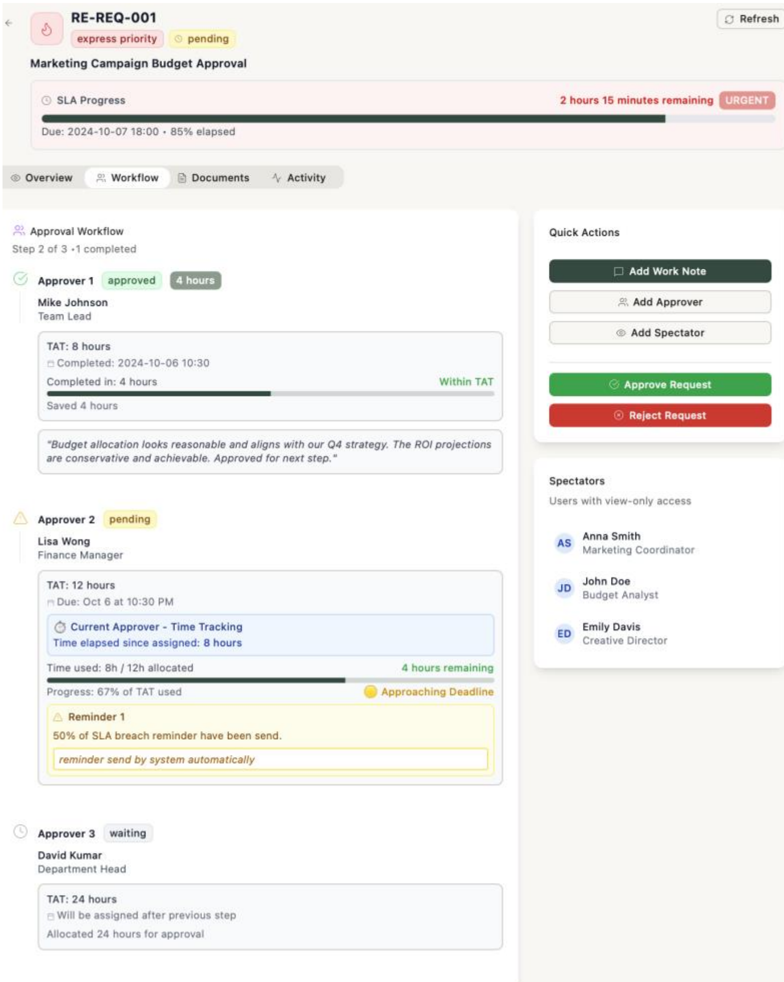
Width:

- Displays **comprehensive request details**, including title, description, initiator info, department, and contact details.
- Shows **priority**, **TAT progress bar**, and **remaining time** until the TAT expires.
- Provides a **tab-based layout** for:
    - **Overview** (request details and status)
    - **Workflow** (approval hierarchy and progress)
    - **Documents** (uploaded files)
    - **Activity** (comments and action log)
- Includes **Quick Actions** for approvers: *Add Work Note, Add Approver, Add Spectator, Approve Request,* and *Reject Request.*
- Lists **Spectators** with view-only access.

Depth:

- **TAT progress bar** dynamically updates based on elapsed and remaining time, color-coded for urgency (e.g., red for nearing expiry).
- Each action (approval, rejection, addition of approver/spectator) is **logged in chronology** within the activity tab for full traceability.
- Approvers can **add comments or attachments** before taking a decision.
- When the request reaches its **final approver**, the system allows closure and triggers an **AI-generated conclusion remark** summarizing the discussion (as per feedback notes).
- **Page refresh** updates data to reflect new comments, document uploads, or action changes.

7.13Request Detail view - Workflow



This screen provides a **stage-by-stage view of the approval hierarchy** within a specific workflow. It helps users and approvers track progress, review comments, and monitor **TAT (Turnaround Time)** performance at each approval level.

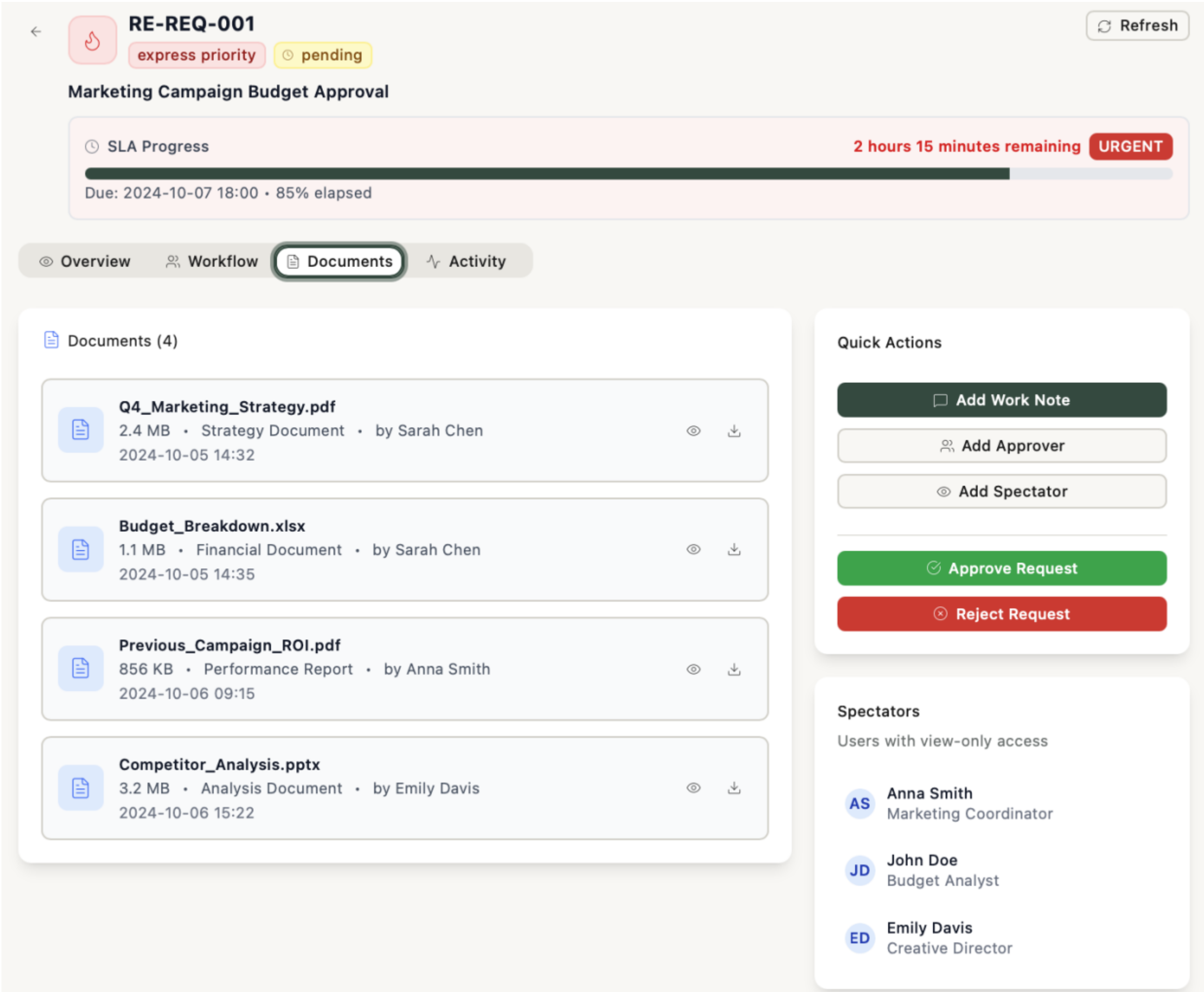
Width:

- Displays each **approver level**, showing their **name, designation, and TAT allocation**.
- Shows **real-time progress** of approvals — *Completed, Pending, Waiting,* or *Approaching Deadline*.
- Includes **TAT tracking** with both elapsed and remaining time indicators.
- Highlights whether each step was completed **within or beyond TAT**.
- Lists **approver comments** for visibility and decision traceability.
- Auto-sends **system-generated reminders** when TAT thresholds are reached (e.g., 50% or 100% usage).

Depth:

- The system **tracks individual TAT usage per approver level**, ensuring delays are isolated to that stage only.
- TAT bars dynamically update color (e.g., green for *Within TAT*, yellow for *Approaching Deadline*, red for *Breached*).
- Automatically sends **TAT reminders** based on configured thresholds — manual reminders are disabled as per design notes.
- Supports **chronological logging** of every action and comment, visible in the activity trail.
- Approvers can **add notes, attach files, or escalate** to higher levels if TAT expires without action.
- The final approver's action **closes the workflow**, triggering summary notifications and AI-generated closure remarks.

7.14Request Detail view - Document



This tab provides a centralized space to **view, manage, and access all documents** attached to the workflow request. It ensures that approvers and spectators have visibility into all supporting materials necessary for informed decision-making.

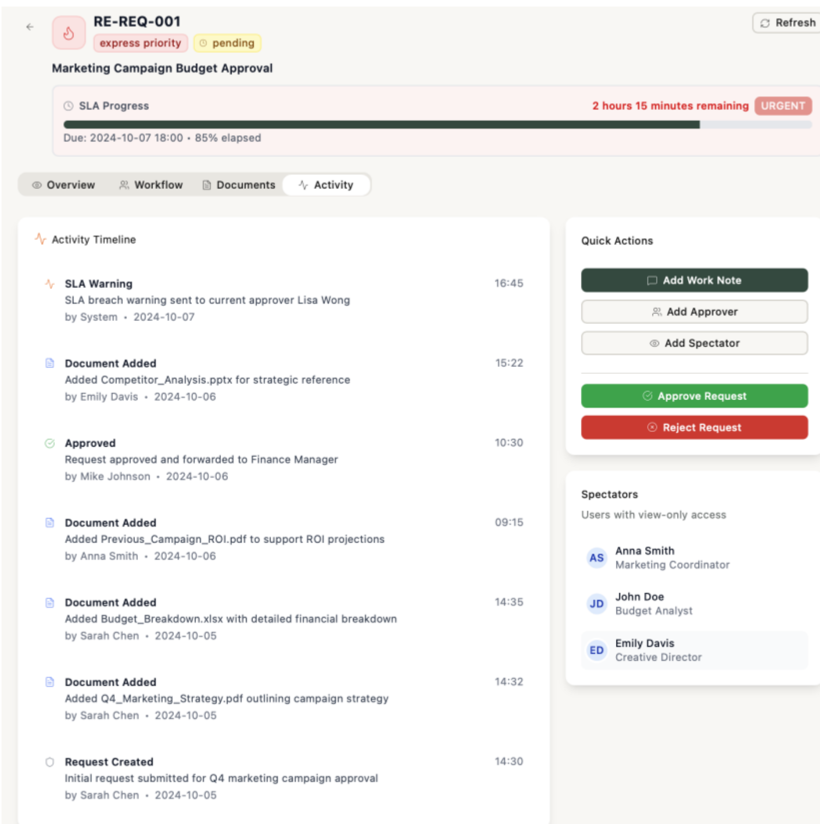
Width:

- Displays a list of **uploaded documents** associated with the request, showing:
  - **File name**, **size**, **type/category**, **uploader**, and **timestamp**.
- Supports standard file types such as **PDF, Word, Excel, PowerPoint, and images**.
- Allows users to **preview or download** files directly from the list.
- **PDF and image files** can be **previewed inline**; other file types must be **downloaded**.
- Shows **Quick Actions** (e.g., *Add Work Note, Add Approver, Add Spectator*) on the side panel for easy context switching.

Depth:

- Ensures **document version integrity** — if the same file name is uploaded again, the latest version is timestamped and saved separately.
- Records **audit entries** whenever a file is uploaded, deleted, or viewed.
- Provides **metadata-based filtering** (by file type, uploader, or date).
- Allows association of **Google Docs** and **Google Sheets links** for live collaboration.
- Refreshes file list **upon page load or when a new document is uploaded**, ensuring users always view the most updated set of attachments.

7.15Request Detail view – Activity



The **Activity Tab** serves as a **chronological timeline** that records every action, event, and update associated with a workflow request. It provides complete transparency for users to trace approvals, comments, document uploads, and system-generated notifications.

Width:

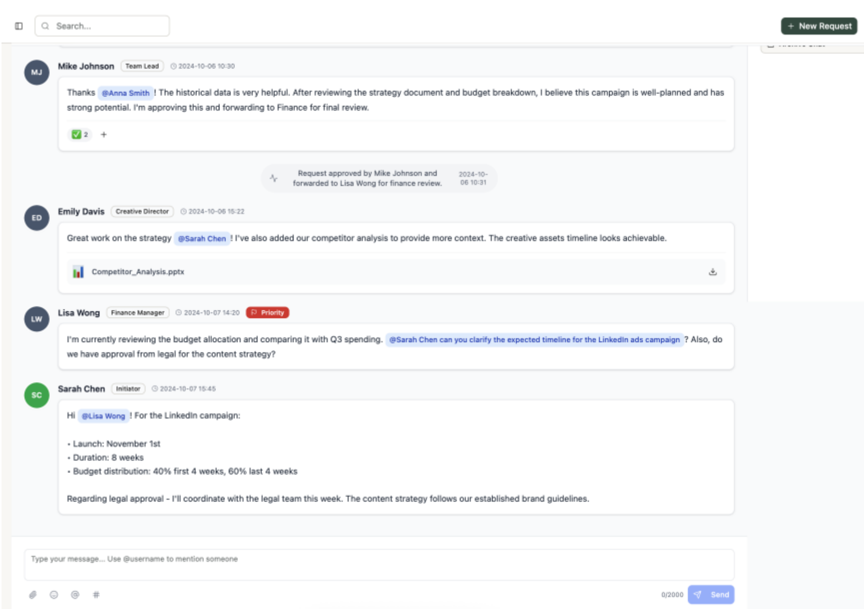
- Displays a **real-time activity timeline**, including events such as:
  - **Request creation**
  - **Approvals and rejections**
  - **Comments and notes added**

    - **Document uploads or deletions**
    - **System-generated TAT warnings or reminders**
- Each activity entry shows:
    - **Event type**, **description**, **timestamp**, and **initiator name**.
- Differentiates between **user actions** (e.g., “Document Added”) and **system events** (e.g., “TAT Warning Sent”).

Depth:

- Activities are displayed in **reverse chronological order**, with the latest updates at the top.
- **Color-coded event icons** visually represent action types (e.g., green for approval, red for warnings).
- Automatically logs **system-generated events** such as TAT breach alerts or reminder dispatches.
- Records **file uploads** with metadata (file name, uploader, timestamp) for audit traceability.
- Ensures **immutable logging** — entries cannot be modified or deleted once created.
- Data refreshes **upon page load**, ensuring users always view the most updated timeline.

7.16Add Work Note



The **Work Notes** section enables participants to **communicate and collaborate directly within a workflow request**, ensuring that all discussions, clarifications, and shared files remain tied to the request record. This eliminates dependency on external email threads and improves traceability.

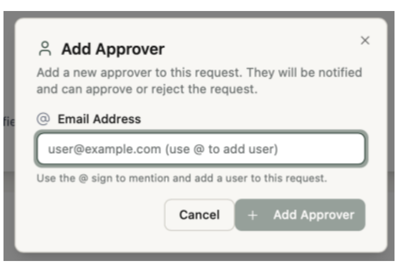
Width:

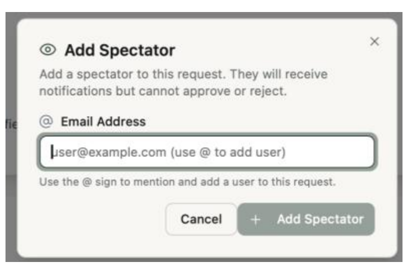
- Displays a **chronological chat-style conversation** between workflow participants.
- Supports **@mentions** to tag users for feedback or updates.
- Allows **file sharing** within messages — uploaded files appear as inline attachments with download options.
- Each message displays the **sender's name, role, timestamp,** and **message content**.
- Offers **reaction options**
- Includes a **message composer** at the bottom with:
    - Text box for entering messages (max 2000 characters).
- Automatically differentiates **roles** using colored badges (e.g., *Initiator, Approver, Spectator*).

Depth:

- Messages are displayed in **reverse chronological order**, preserving a clear dialogue history.
- **@mentions** trigger system notifications to the tagged users.
- Each message is **time-stamped, immutable, and stored** as part of the request's permanent record.
- Inline attachments are linked to the **Documents Tab** for centralized access.
- **Priority tags** (e.g., *P – Priority*) appear inline when approvers mark messages as urgent.
- The chat interface automatically **refreshes upon page load** to reflect the latest messages and reactions.
- Chat data remains **available throughout the workflow lifecycle** and is archived upon closure.
- If there is a query at any level, user will mention it here and ask additional details.

7.17Add Approver & Spectator





This feature allows users to **add new participants**—either as **Approvers** or **Spectators**—to an ongoing workflow request. It provides flexibility for dynamically updating the workflow hierarchy or visibility list during the approval process.

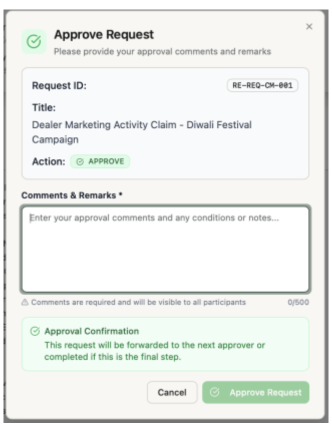
Width:

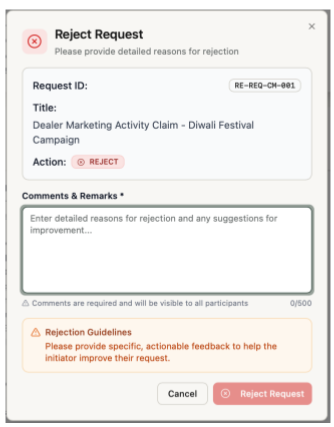
- Displays a modal popup titled **“Add Approver”** or **“Add Spectator,”** depending on the selected action.
- Provides a single input field for **email address entry** using the **@ mention** convention.
- Allows users to search and add participants by **email or username**.
- Includes two action buttons: **Confirm (Add)** and **Cancel.**
- **Approvers:** Gain the ability to review, approve, or reject the request.
- **Spectators:** Gain view-only access with the ability to comment and receive notifications.
- Both participant types receive **automated notifications** upon being added.

Depth:

- The **Approver** is inserted into the approval hierarchy in the defined sequence; the **Spectator** is added to the visibility list.
- All additions are **recorded in the activity timeline** for audit and transparency.
- **Notifications** are sent automatically to the newly added users via the system’s alert service.
- **Approver TAT** begins only when their stage becomes active in the workflow.
- The popup **closes automatically** upon successful addition, refreshing the request view to reflect the change.

7.18Approve / Reject Request (Popup Window)





This feature enables approvers to **write their decision on a workflow request** by either approving or rejecting it. It ensures that each decision is properly documented with remarks, creating a transparent and traceable approval trail.

Width:

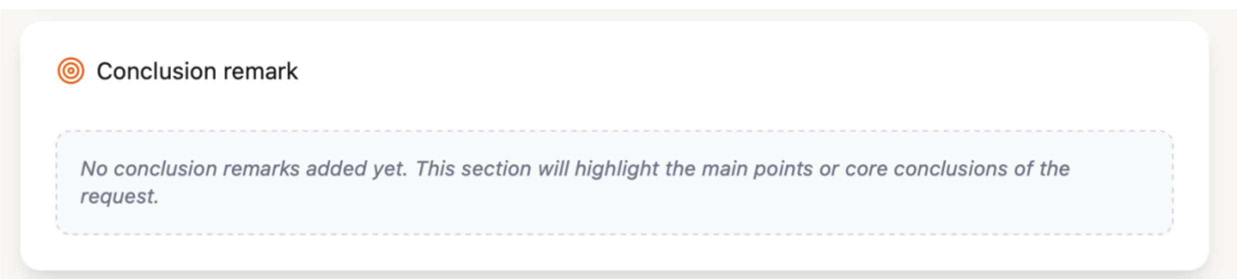
- Displays a modal window titled **“Approve Request”** or **“Reject Request.”**

- Shows key request information:
  - **Request ID**
  - **Request Title**
  - **Action Type** (*Approve* or *Reject*).
- Includes a mandatory **Comments & Remarks** field (up to 500 characters) for justifying the decision.
- Contains two buttons:
  - **Approve Request / Reject Request** — confirms and submits the decision.
  - **Cancel** — closes the modal without any action.
- Shows a contextual message:
  - **Approval Confirmation** for approval flow.
  - **Rejection Guidelines** encouraging constructive feedback.

Depth:

- **Comments are mandatory** for both approval and rejection to ensure context for future reference.
- Upon approval:
  - The system **forwards the request** to the next approver in the hierarchy or **closes it** if this is the final level.
  - If the final approver needs to consult with someone, he can use work note to specify that user, conclude and put the final closing remarks
  - Status updates automatically across all linked screens.
- Upon rejection:
  - The system **sends a notification** to the initiator along with rejection remarks.
  - The request is marked as **"Rejected"** and closed for further approval.
- All actions are **logged in the Activity Tab** with timestamps and user details.
- The popup automatically **closes upon successful submission**, refreshing the view to display the updated status.

7.19Closure Remark



This stage marks the **final closure** of a workflow request after all approvals are completed. Once the final approver submits their decision, the request automatically **returns to the Initiator** with an **AI-generated Conclusion Remark** summarizing the entire workflow journey.

The Initiator reviews, optionally edits, and **marks the request as closed**, completing the lifecycle.

Width:

- Becomes available **after the final approver's action** is recorded.
- Displays an **AI-generated Conclusion Remark** summarizing:
  - Discussion highlights and decision points
  - Key approval or rejection reasons
  - Notable attachments or supporting references
- Allows the **Initiator** to review and, if required, **edit or enhance the remark** before final closure.
- Once confirmed, the request status changes to **"Closed"**, and the final remark becomes part of the permanent workflow record.
- The **Conclusion Remark** is visible under:
  - **My Requests (Approved)**
  - **Open Requests**
  - **Closed Requests**
- If no remark exists, a placeholder message is displayed:
  "No conclusion remarks added yet. This section will highlight the main points or core conclusions of the request."

Depth:

- The **AI engine** compiles the initial remark using inputs from **Work Notes, Approver Comments, and Activity Logs**.
- The remark generation occurs **immediately after the final approval action** is completed.
- The **Initiator** can make final edits or confirmations before closing the request.
- Once marked as closed, the remark becomes **read-only** for all other participants and spectators.
- The finalized conclusion is stored with **workflow metadata** for **audit, compliance, and reporting**.
- Closed requests retain full visibility of their conclusion remarks for **traceability and knowledge retention**.

8 Client Feedback Log (Post-Review Updates)

This section tracks all **client-driven changes, clarifications, or design validations** received after initial wireframe or SRS review. Each point is linked to the relevant feature section for traceability.

#	Client Request / Feedback	Response / Action Taken (Rohit)	Linked Feature Section
1	Remove the **TAT modification** option for approvers, allowing only during initiation.	Accepted – TAT edit will be available only at request initiation, not at approval stages.	Approval Workflow
2	Display **Conclusion Remarks** in *My Requests* for approved requests, consistent with *Open* and *Closed Requests*.	Agreed – Will be implemented during development. To align with design limitation noted in section 6.20.	My Requests, Conclusion Remark
3	Need to see **how conclusion workflow works**; final approver should have ability to enter conclusion.	Confirmed – After final approval, request returns to initiator with AI-generated comments for review/edit before closure.	Conclusion Remark
4	Add **restrictive view** for sharing approved requests with non-participants.	Accepted – To be managed via *Work Notes* option with permission control.	Work Notes
5	Clarify **sharing and download** permissions for requests.	Approved – Requests can be shared internally using *Add Spectator*. *Download* option will be enabled for Work Notes attachments only.	Add Participant, Work Notes

9 Non-Functional Requirements

Category	Requirement
Performance	Average response time < 3 seconds for standard operations.
Scalability	Should scale horizontally on GCP.
Security	JWT tokens, encrypted passwords, HTTPS enforced.
Usability	Intuitive UI, consistent icons, and simple navigation.
Reliability	99% uptime target.
Backup & Recovery	Daily database backup and weekly full snapshot.
Compliance	Follows RE IT data privacy guidelines.

10 Technology Matrix

Component	Specification
Database	PGSQL (Managed or local instance)
Application Stack	Node.js (Backend) + React.js (Frontend)
Authentication	RE SSO Bridge

11 Infra requirements & System Hygiene

Component	Specification
Environment	QA / Testing
# of Virtual Machines (VMs)	1
CPU Configuration	4-Core
Memory (RAM)	16 GB
Disk Size	500 GB
Operating System	Ubuntu 24.04 LTS
Storage Type	Cloud

Backup and Recovery

- Daily incremental and weekly full backups.
- Restore process must not exceed 2 hours.

12 Not in scope

Anything which comes beyond the scope defined above in terms of Width and depth