

RE Workflow Management – Not Templatized

System Requirements Specifications

13-Oct-2025

Version 1.0

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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-templated 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-Templated	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-Templated 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-templated 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.

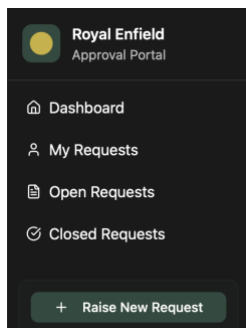
Dependency

- 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-templated)
- 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.

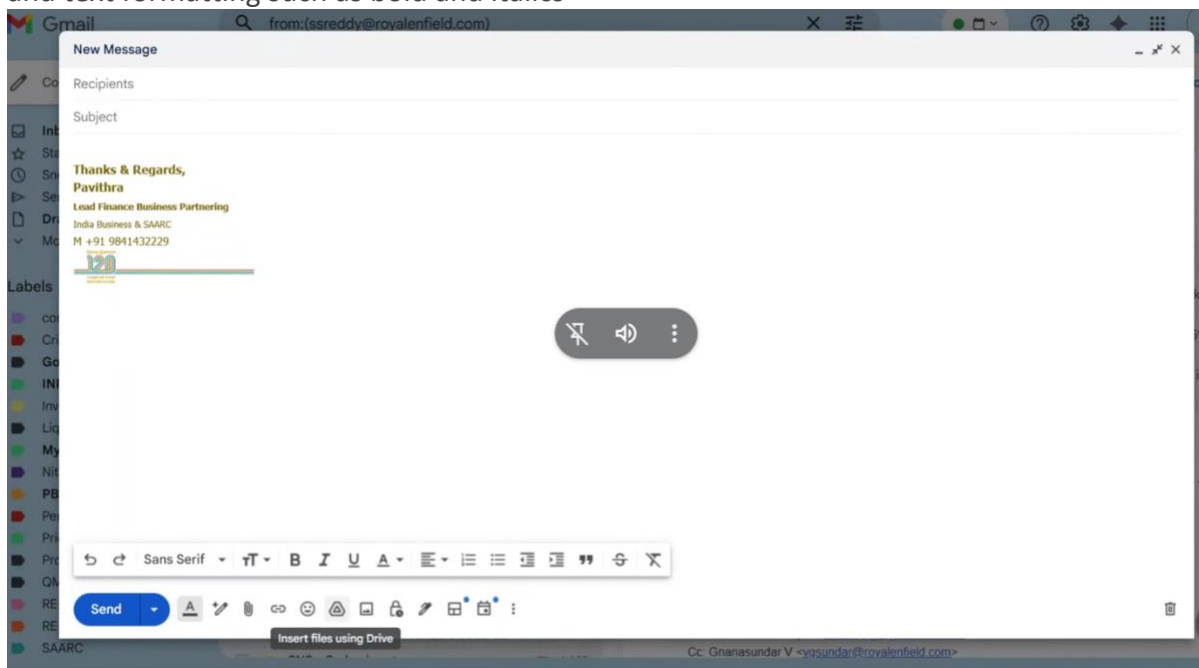
Width:

- 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

Create New Request
Step 3 of 6: Approval Workflow

50% Complete
3 steps remaining

Template Selection Basic Information **Approval Workflow** Participants & Access Documents & Attachments Review & Submit

Approval Workflow
Define the approval hierarchy and assign approvers by email ID.

Approval Configuration
Configure how many approvers you need and define the approval sequence.

Number of Approvers *
1
Maximum 10 approvers allowed. Each approver will review sequentially.

Approval Hierarchy *
Define the approval sequence. Each approver will review the request in order from Level 1 to Level 1.

Request Initiator YOU
Creates and submits the request

Approver Level 1 FINAL APPROVER

Email Address *
approver@royalenfield.com
@ Use @ sign to tag a user

TAT (Turn Around Time) *
24
Maximum time for this approver to review and respond (1-720 hours)
This approver can close the request upon approval

Approval Flow Summary
Your request will follow this sequence: You (Initiator) -> Level 1 Approver. The final approver can close the request.

TAT Summary
Complete all approver TAT information to see total duration summary

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

Create New Request
Step 5 of 6: Documents & Attachments

83% Complete
1 steps remaining

Template Selection Basic Information Approval Workflow Participants & Access **Documents & Attachments** Review & Submit

Documents & Attachments
Upload supporting documents, files, and any additional materials for your request.

File Upload
Attach supporting documents (PDF, Word, Excel, Images). Max 10MB per file.

Upload Files
Drag and drop files here, or click to browse

+ Browse Files

Supported formats: PDF, DOC, DOCX, XLS, XLSX, JPG, PNG, PPT, PPTX

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

Template Selection Basic Information Approval Workflow Participants & Access Documents & Attachments Review & Submit

Basic Information

Description
d

Priority Level
Express

Approval Workflow
Sequential approval hierarchy with TAT (Turn Around Time) for each level

Workflow Type	Approval Levels	Escalation
Sequential	1 Level	Enabled

Approver Level 1 FINAL APPROVER

1 Email Address: d TAT (Turn Around Time): 3 hours

Assigned Can Close

Participants & Access Control

Comments: Allowed Document Upload: Allowed

Spectators (3)
rohit (rohit@gmail.com) Ankit (Ankit@royal.com) Aaditya (Aaditya@h.com)

View-only access with commenting privileges

Ready to Submit Request
Once submitted, your request will enter the approval workflow and notifications will be sent to all relevant participants.

Request Type: Custom Request Approval Levels: 1 Documents: 0 attached

Previous Save Draft Submit Request

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.

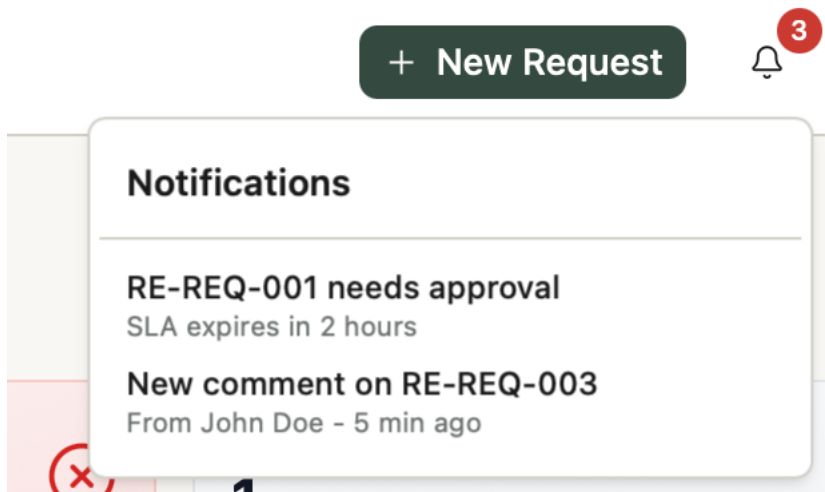
Width:

- 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.

7.10 Notifications



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.

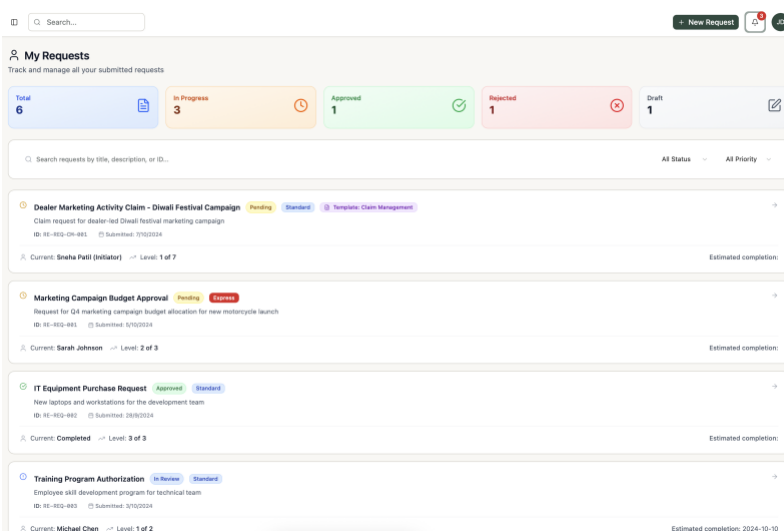
Width:

- 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.

7.11 My 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.

RE-REQ-001

express priority

pending

Refresh

Marketing Campaign Budget Approval

SLA Progress

2 hours 15 minutes remaining

URGENT

Due: 2024-10-07 18:00 • 85% elapsed

Overview

Workflow

Documents

Activity

Request Initiator

SC

Sarah Chen

Marketing Manager

Marketing Department

sarah.chen@royalencfield.com

+1 (555) 0123

Quick Actions

Add Work Note

Add Approver

Add Spectator

Approve Request

Reject Request

Request Details

Description

Request for Q4 marketing campaign budget allocation of \$50,000 for digital advertising across social media platforms and content creation.

This comprehensive campaign will focus on:

Facebook and Instagram advertising (\$25,000)

Targeted ads for motorcycle enthusiasts

Brand awareness campaigns

Lead generation initiatives

Google Ads and YouTube promotion (\$15,000)

Search engine optimization

Video marketing campaigns

Product showcase advertisements

LinkedIn professional network ads (\$7,000)

B2B marketing initiatives

Corporate partnerships

Industry networking events

Twitter/X sponsored content (\$3,000)

Community engagement

Real-time customer support

Trending hashtag campaigns

Expected ROI: 300% based on previous campaign performance

Campaign Duration: October - December 2024

Target Audience: 25-45 age group interested in motorcycles and adventure sports

Success Metrics: 50% increase in brand awareness, 30% increase in qualified leads

Priority Level

SLA Deadline

EXPRESS

2024-10-07 18:00

Conclusion remark

No conclusion remarks added yet. This section will highlight the main points or core conclusions of the request.

19

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.

7.13 Request Detail view - Workflow

RE-REQ-001 express priority pending Refresh

Marketing Campaign Budget Approval

SLA Progress 2 hours 15 minutes remaining URGENT
Due: 2024-10-07 18:00 • 85% elapsed

Overview **Workflow** **Documents** **Activity**

Approval Workflow
Step 2 of 3 - 1 completed

Approver 1 approved 4 hours
Mike Johnson
Team Lead

TAT: 8 hours
Completed: 2024-10-06 10:30 Within TAT
Completed in: 4 hours
Saved 4 hours

"Budget allocation looks reasonable and aligns with our Q4 strategy. The ROI projections are conservative and achievable. Approved for next step."

Approver 2 pending
Lisa Wong
Finance Manager

TAT: 12 hours
Due: Oct 6 at 10:30 PM

Current Approver - Time Tracking
Time elapsed since assigned: 8 hours

Time used: 8h / 12h allocated 4 hours remaining
Progress: 67% of TAT used Approaching Deadline

Reminder 1
50% of SLA breach reminder have been send.
reminder send by system automatically

Approver 3 waiting
David Kumar
Department Head

TAT: 24 hours
Will be assigned after previous step
Allocated 24 hours for approval

Quick Actions

Add Work Note
Add Approver
Add Spectator
Approve Request
Reject Request

Spectators
Users with view-only access

AS Anna Smith
Marketing Coordinator
JD John Doe
Budget Analyst
ED Emily Davis
Creative Director

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.

7.14 Request Detail view - Document

The screenshot shows a workflow request interface for 'RE-REQ-001'. At the top, there's a header with a back arrow, a flame icon, the request ID 'RE-REQ-001', and status tags 'express priority' and 'pending'. A 'Refresh' button is on the right. Below the header, the title 'Marketing Campaign Budget Approval' is displayed. A progress bar indicates 'SLA Progress' with '2 hours 15 minutes remaining' and an 'URGENT' label. The due date is '2024-10-07 18:00' and 85% of the time has elapsed. A navigation bar at the top includes 'Overview', 'Workflow', 'Documents' (which is highlighted), and 'Activity'. The main content area is divided into two columns. The left column, titled 'Documents (4)', lists four files: 'Q4_Marketing_Strategy.pdf' (2.4 MB, Strategy Document, by Sarah Chen, 2024-10-05 14:32), 'Budget_Breakdown.xlsx' (1.1 MB, Financial Document, by Sarah Chen, 2024-10-05 14:35), 'Previous_Campaign_ROI.pdf' (856 KB, Performance Report, by Anna Smith, 2024-10-06 09:15), and 'Competitor_Analysis.pptx' (3.2 MB, Analysis Document, by Emily Davis, 2024-10-06 15:22). Each file entry includes a document icon, file name, size, category, uploader, and timestamp, along with preview and download icons. The right column contains 'Quick Actions' with buttons for 'Add Work Note', 'Add Approver', 'Add Spectator', 'Approve Request', and 'Reject Request'. Below this is a 'Spectators' section titled 'Users with view-only access' listing three users: Anna Smith (Marketing Coordinator), John Doe (Budget Analyst), and Emily Davis (Creative Director).

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.

7.15 Request Detail view – Activity

RE-REQ-001
express priority pending Refresh

Marketing Campaign Budget Approval

SLA Progress 2 hours 15 minutes remaining URGENT
Due: 2024-10-07 18:00 • 85% elapsed

Overview Workflow Documents **Activity**

Activity Timeline

- SLA Warning** 16:45
SLA breach warning sent to current approver Lisa Wong by System • 2024-10-07
- Document Added** 15:22
Added Competitor_Analysis.pptx for strategic reference by Emily Davis • 2024-10-06
- Approved** 10:30
Request approved and forwarded to Finance Manager by Mike Johnson • 2024-10-06
- Document Added** 09:15
Added Previous_Campaign_ROI.pdf to support ROI projections by Anna Smith • 2024-10-06
- Document Added** 14:35
Added Budget_Breakdown.xlsx with detailed financial breakdown by Sarah Chen • 2024-10-05
- Document Added** 14:32
Added Q4_Marketing_Strategy.pdf outlining campaign strategy by Sarah Chen • 2024-10-05
- Request Created** 14:30
Initial request submitted for Q4 marketing campaign approval by Sarah Chen • 2024-10-05

Quick Actions

- Add Work Note
- Add Approver
- Add Spectator
- Approve Request
- Reject Request

Spectators
Users with view-only access

- AS Anna Smith
Marketing Coordinator
- JD John Doe
Budget Analyst
- ED Emily Davis
Creative Director

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:

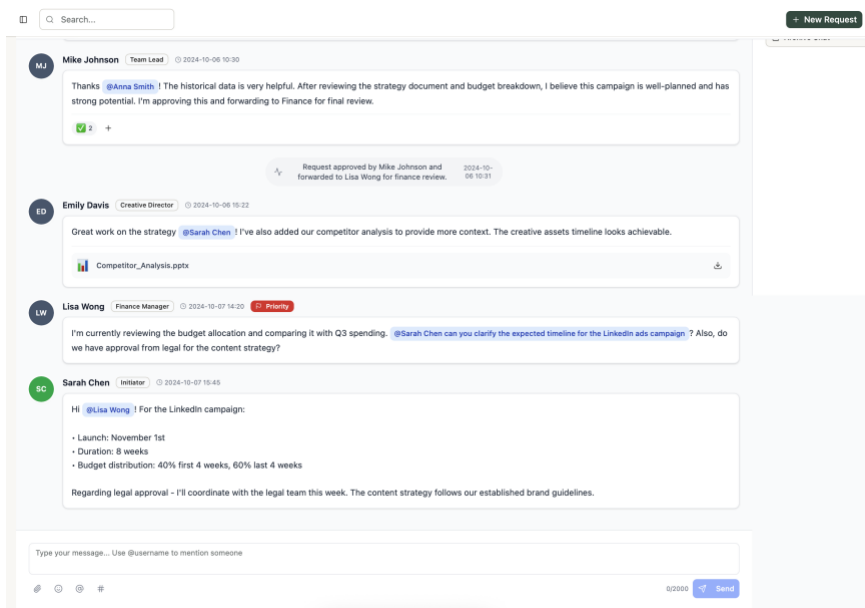
- Displays a **real-time activity timeline**, including events such as:
 - **Request creation**
 - **Approvals and rejections**
 - **Comments and notes added**

- 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.

7.16 Add 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.

7.17 Add Approver & Spectator

The image shows two side-by-side screenshots of user interface forms. The left form is titled 'Add Approver' and the right form is titled 'Add Spectator'. Both forms have a close button (X) in the top right corner. Below the title, there is a brief instruction: 'Add a new approver to this request. They will be notified and can approve or reject the request.' for the left form, and 'Add a spectator to this request. They will receive notifications but cannot approve or reject.' for the right form. Both forms have a label '@ Email Address' above a text input field. The input field contains the placeholder text 'user@example.com (use @ to add user)'. Below the input field, there is a small instruction: 'Use the @ sign to mention and add a user to this request.' At the bottom of each form, there are two buttons: 'Cancel' and '+ Add Approver' (for the left form) or '+ Add Spectator' (for the right form).

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.

7.18 Approve / Reject Request (Popup Window)

The image displays two side-by-side screenshots of modal windows for request approval and rejection.

Approve Request (Left Window):

- Title:** Dealer Marketing Activity Claim - Diwali Festival Campaign
- Request ID:** RE-REQ-CH-001
- Action:** ☒ APPROVE
- Comments & Remarks ***: A text area with the placeholder "Enter your approval comments and any conditions or notes..." and a character count of 0/500.
- Approval Confirmation:** A green box stating "This request will be forwarded to the next approver or completed if this is the final step."
- Buttons:** Cancel and Approve Request.

Reject Request (Right Window):

- Title:** Dealer Marketing Activity Claim - Diwali Festival Campaign
- Request ID:** RE-REQ-CH-001
- Action:** ☒ REJECT
- Comments & Remarks ***: A text area with the placeholder "Enter detailed reasons for rejection and any suggestions for improvement..." and a character count of 0/500.
- Rejection Guidelines:** A yellow box stating "Please provide specific, actionable feedback to help the initiator improve their request."
- Buttons:** Cancel and Reject Request.

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.

7.19 Closure Remark

🎯 Conclusion remark

No conclusion remarks added yet. This section will highlight the main points or core conclusions of the request.

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 <i>My Requests</i> for approved requests, consistent with <i>Open</i> and <i>Closed Requests</i> .	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 <i>Work Notes</i> option with permission control.	Work Notes
5	Clarify sharing and download permissions for requests.	Approved – Requests can be shared internally using <i>Add Spectator</i> . <i>Download</i> 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