

AUTOMATION

INTRODUCTION

- RAS enables the enterprise customers to do complete automation from one place. In RAS, Automate, elastic apps and Story enables the customers to do automation for organizational operations. Here packaging the processes for the business operations can be done.
- The packaged processes installed and the tested scenarios for the processes can be done for the organization. By using elastic apps, developing the elastic applications, customizing the elastic applications and testing the applications can be done for organizational operations. Relgo Automation Studio enables rapid on demand automation of processes with zero capital expenditure for an organization.
- To get data like forms we use automate. Automate the packaged app space in development cloud before deploying to operations cloud for your organization. Wizard helps you to deploy and test each role scenario and make ready for production. To automate your Process in development Cloud , first you need to install development cloud installation
- Process Analyst/Administrator will analyze the customer requirements and do mapping with Relgo processes and scenarios. Review and decide the list of processes and scenarios to be automated.
- New App spaces are created and assigned for customer processes to appropriate role template.

AUTOMATION PROCEDURE

- The **Business Process Automation** (BPA) approach states that until a process automated, there is no real value in analyzing and defining it and that the cycle of business change is so rapid .It simplification is not time to define every process before choosing which ones to address with automation and that delivering immediate benefits creates more value.
- Through RAS Automation, the packaged applications in development cloud are automated before deploying to operations cloud. To automate the packaged applications in development cloud, need to install the development cloud first. The procedure to automate the packaged processes is as follows.
- Install the development cloud functionality, create roles for selected role templates, and initialize the data, formats, workflows and test each scenario, which is assigned to role and update the package status.
- After testing the role scenarios in development cloud, process wise scenarios will moved to operations cloud for the organization operations.

These are the Steps for Automation in RAS

- Setup
- App spaces
- Installations
- Organization
- Roles
- Directory
- Initialization
- Automate
- Go Live After finishing these five steps Automation is finished and you are ready for deploy in Live System (Relgo Operations Cloud)

PREREQUISITIES

- Create account in RNC (<http://www.relgo.com>)
- Verify and create identity cast.
- Subscribe in RAS (<http://www.relgo.com/ras>) with generated identity cast.
- Complete Bootstrap installations.

PROCEDURE

APPLICATION SETUP

- Click **Setup** menu in **Automate Operation** main menu which is shown in below screen.

Login to RAS → Automate.io → My App Spaces

The screenshot displays the Relgo Automation Studio interface. The top navigation bar is teal and contains the Relgo logo, the text "Relgo Automation Studio", a user profile icon with "Welcome : priyanka.k", and a "Signout" link. Below the navigation bar is a menu with options: "Automation Tools" (with a gear icon), "Setup" (with a document icon), "Organization" (with a group icon), "Initialization" (with a checkmark icon), "Test" (with an envelope icon), and "Go Live" (with a play icon). The "Setup" menu is open, showing a dropdown with "My AppSpaces", "My Installations", and "Package Wise Installations". The main content area is titled "Welcome to Development Cloud" and includes the text: "Automate your process in development cloud before deploying in operational cloud" and "To automate your Process in development Cloud you need to install development cloud installation". A prominent "Install" button is centered on the page. On the left side, there is a sidebar with "Automation Tools" and a list of tools: "process.io", "automate.io" (highlighted in teal), "deploy.io", "elasticapp.io", and "story.io". The "automate.io" tool description reads: "Automate packaged appspace in development cloud before deploying to operations cloud for your organization. Wizard helps you to deploy and test each role scenario and make the ready for production."

- Select **App spaces** in the menu, lists all the package names to Automate

The screenshot shows the Relgo Automation Studio interface. The top navigation bar includes the Pabbly logo, 'Relgo Automation Studio', and a user profile 'Welcome : maneesh.reddy' with a 'Signout' link. Below the navigation bar are tabs for 'Automation Tools', 'Setup', 'Organization', 'Initialization', 'Test', and 'Go Live'. The 'Automation Tools' sidebar lists 'process.io', 'automate.io' (highlighted), 'deploy.io', 'elasticapp.io', and 'story.io'. The main content area shows 'Select Feature > New Get AppSpaces' and a table with the following data:

<input type="checkbox"/>	App Space Name	Automate	Deploy
<input type="checkbox"/>	Rithwik ap	Re-Automate	Deploy
<input type="checkbox"/>	new ap appspace	Automate	Deploy
<input type="checkbox"/>	NEW AP APPSPACE	Re-Automate	Deploy
<input type="checkbox"/>	CRM Maneesha	Re-Automate	Deploy
<input type="checkbox"/>	Marketplace appspace	Re-Automate	Deploy
<input type="checkbox"/>	stores & procurement	Automate	Deploy
<input type="checkbox"/>	test package	Re-Automate	Deploy

- Check the package which needs to automate, click on **Automate** which is highlighted. Once process is completed the status is changed to **Automated** as shown in below screen.

This screenshot is identical to the one above, showing the Relgo Automation Studio interface. The 'Automate' column for the 'new ap appspace' row is highlighted in blue, indicating the selected action.

- To get the data of created process, Select **Installations** then you will get all the process which you have created. The initial processes associated to the operational processes in the package are installed.
Login to RAS → Automate.io → My Installations.
- If you want to install particular process of particular package then choose package wise installations. Check the package which needs to Install, click on **start** which is highlighted. Once process is completed the status is changed to **completed** as shown below.

The screenshot shows the RELGO Automation Studio interface. At the top, there is a navigation bar with the RELGO logo and 'Automation Studio' text. Below the navigation bar, there are tabs for 'DEV CLOUD' and 'OPS CLOUD'. The main content area displays a table with columns for 'Appspace Name', 'Description', 'Select Process', 'Updated On', and 'Install'. The table lists various processes such as 'Relgo Accounts', 'Relgo Human Resource Management', 'Relgo Inventory Process for Market Place', and 'Relgo Order Processing'. Each row has a checkbox in the 'Appspace Name' column and a 'start' button in the 'Install' column.

Appspace Name	Description	Select Process	Updated On	Install
<input type="checkbox"/> Relgo Accounts		Manage statutory financial reporting for the organization	10/27/2017	start
<input type="checkbox"/>		Manage Financial transactions for payables and receivables integrated with organization operations.	10/27/2017	start
<input type="checkbox"/> Relgo Human Resource Management		Setup Employee Compensation Management System	11/21/2017	start
<input type="checkbox"/>		Establish Employee Leave Management Process	11/21/2017	start
<input type="checkbox"/>		Establish Employee Attendance Management Process	11/21/2017	start
<input type="checkbox"/> Relgo Inventory Process for Market Place	Setup inventory related to market place products to support orders	Manage store and initial inventory	10/25/2017	start
<input type="checkbox"/> Relgo Market Place		Manage online sales and track sales status	10/25/2017	start
<input type="checkbox"/>		Enable customers to purchase Products online using various payment methods and track purchases	10/25/2017	start
<input type="checkbox"/>		Establish procedure for executing a project for completion	10/25/2017	start
<input type="checkbox"/>		Establish procedures for creating new designs, templates and bill of materials.	10/25/2017	start
<input type="checkbox"/> Relgo Order Processing		Manage sales orders, approvals, bill of material and payment plans for processing customer	10/29/2017	start

- Click **RAS** menu and click **Install** button, this will install the processes selected in the package to development cloud.

- After completion of installation, user has to Convert Role Templates in to Role. Select **Roles**, check relevant roles from the role template and add to **My Role**.
Login to RAS → Automate.io → Organization → Role.

The screenshot shows the Relgo Automation Studio interface. The top navigation bar includes the Relgo logo, the text 'Relgo Automation Studio', and a user profile section with 'Welcome : maneasha.reddy' and a 'Signout' link. Below the navigation bar, there are tabs for 'Automation Tools', 'Setup', 'Organization', 'Initialization', 'Test', and 'Go Live'. The left sidebar lists integration tools: process.io, automate.io (highlighted), deploy.io, elasticapp.io, and story.io. The main content area is titled 'Organization Chart > My Role' and contains a search bar and a table with the following data:

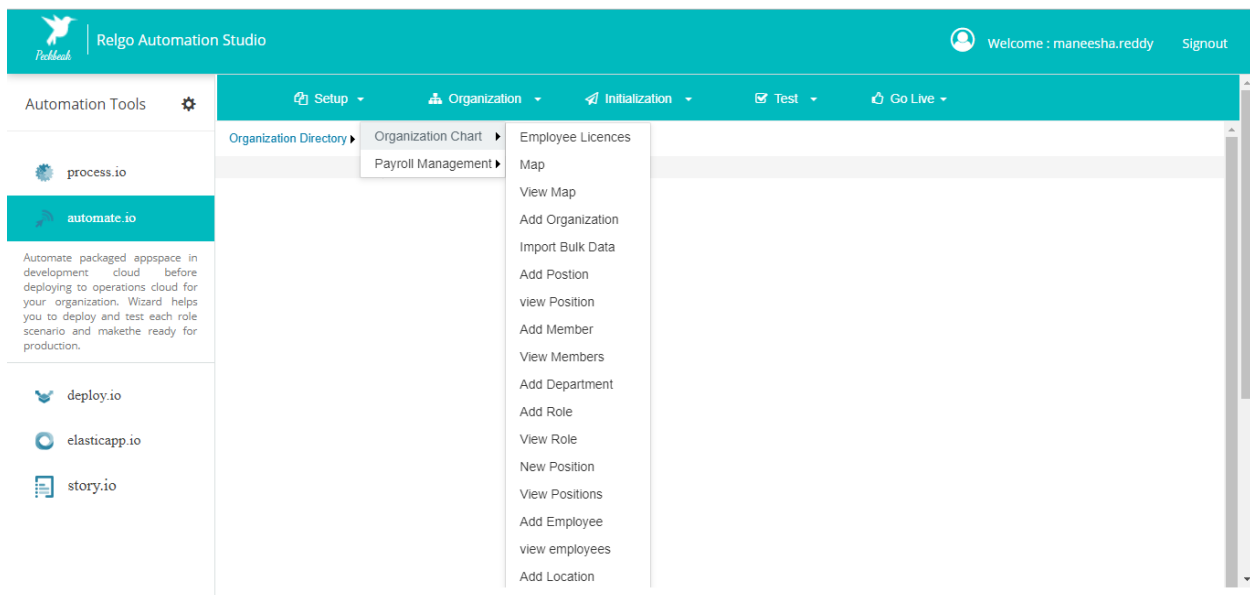
Role Name	Description	Select Modules	Select Feature	Select Scenarios	Select Process
Sales Executive		Sales Automation	Leads,Prospects	Sales executive prepares sales order for one or more products for sales closer,Sales Executive sends promotion material, proposal for a product,Sales executive takes the lead through demo, negotiation and other sales stages as needed and convert them to customer,Setup lead form for a product to collect leads,Setup sales process and sales executive to lead for sales conversion,Generate prospects from campaigns	

Below the table, there is a blue button labeled 'My Role'.

DIRECTORY SETUP

- Click **Organization** menu in **Automate Operation** main menu.
- Converted role templates in to roles can be seen in “Directory” which is under “Organization” menu.
- Under **Directory**, there are two sub menus as
 - 1) Organization Directory
 - 2) Payroll Management
- After converting role templates in to roles, user has to add position, department, location and members because process analyst should assign role wise to automation engineers for testing. So that Task and permissions will directly go to automation engineers and they need not to install the process.

Login to RAS → Automate.io → Organization → Directory.



The screenshot displays the Relgo Automation Studio interface. The top navigation bar is teal and contains the Relgo logo, the text "Relgo Automation Studio", and a user profile section with "Welcome : maneasha.reddy" and a "Signout" link. Below the navigation bar, there are several menu items: "Automation Tools" with a gear icon, "Setup", "Organization", "Initialization", "Test", and "Go Live". The "Organization" menu is expanded, showing "Organization Directory" and "Payroll Management". The "Organization Directory" sub-menu is further expanded, listing various actions: "Employee Licences", "Map", "View Map", "Add Organization", "Import Bulk Data", "Add Position", "view Position", "Add Member", "View Members", "Add Department", "Add Role", "View Role", "New Position", "View Positions", "Add Employee", "view employees", and "Add Location". On the left side, there is a sidebar with "Automation Tools" and a list of integrations: "process.io", "automate.io" (highlighted in teal), "deploy.io", "elasticapp.io", and "story.io". Below "automate.io", there is a brief description: "Automate packaged appspace in development cloud before deploying to operations cloud for your organization. Wizard helps you to deploy and test each role scenario and make the ready for production."

ADD POSITION

- Give position name and description then click on “Add” button which is shown below.

The screenshot shows the Relgo Automation Studio interface. The top navigation bar includes the Relgo logo, the text 'Relgo Automation Studio', a user profile icon with 'Welcome : maneesh.reddy', and a 'Signout' link. Below the navigation bar is a menu with 'Automation Tools' and a settings gear icon, followed by tabs for 'Setup', 'Organization', 'Initialization', 'Test', and 'Go Live'. The main content area is titled 'Organization Directory' and 'Organization Chart > Add Postion'. The form contains a '*Position Name' field, a 'Description' field, and an 'Existing Positions' dropdown menu with 'Select Some Options' as the selected value. At the bottom of the form are 'Add' and 'Cancel' buttons. On the left side, there is a sidebar with 'Automation Tools' and a list of tools: process.io, automate.io (highlighted), deploy.io, elasticapp.io, and story.io. The 'automate.io' tool description reads: 'Automate packaged appspace in development cloud before deploying to operations cloud for your organization. Wizard helps you to deploy and test each role scenario and make the ready for production.'

ADD DEPARTMENT

- Give position name and description then click on “Add” button which is shown below.

The screenshot shows the Relgo Automation Studio interface, similar to the previous one. The top navigation bar and menu are identical. The main content area is titled 'Organization Directory' and 'Organization Chart > Add Department'. The form contains a '*Department Name' field, a 'Description' field, and an 'Existing Departments' dropdown menu with 'Select Some Options' as the selected value. At the bottom of the form are 'Add' and 'Cancel' buttons. The sidebar on the left is also identical to the previous screenshot.

ADD LOCATION

- Fill the required fields like name, Address, city, country, state, phone number then click on “Add Location”.

The screenshot shows the 'Add Location' form in the Relgo Automation Studio. The interface includes a top navigation bar with the 'Relgo Automation Studio' logo and a user profile 'Welcome : maneasha.reddy' with a 'Signout' link. A secondary navigation bar contains tabs for 'Setup', 'Organization', 'Initialization', 'Test', and 'Go Live'. On the left, there is a sidebar for 'Automation Tools' with icons for 'process.io', 'automate.io' (highlighted), 'deploy.io', 'elasticapp.io', and 'story.io'. The main content area is titled 'Organization Directory > Add Location' and contains the following form fields: '*Location Name' (text input), 'Existing Locations' (dropdown menu with 'Select Some Options'), 'Address:' (text input), 'Country' (text input), 'City' (text input with an information icon), 'State' (text input with an information icon), 'Postal Code' (text input), '*Phone Number' (text input with an information icon), and '*GeoTagid:' (text input). A blue 'Add Location' button is positioned at the bottom right of the form.

ADD MEMBERS

- Fill the required fields like first name, Last name, email address, phone number and select roles, position and relation type then click on “Add Member” which is shown in below screens.

The screenshot shows the 'Add Member' form in the Relgo Automation Studio. The interface is consistent with the previous screenshot, including the top navigation bar, sidebar, and secondary navigation bar. The main content area is titled 'Organization Directory > Add Member' and contains the following form fields: '*First Name' (text input), 'Last Name' (text input), '*Email Address' (text input with an information icon), '*Phone Number' (text input with an information icon), 'Role's' (dropdown menu with 'Select Some Options'), 'Position' (dropdown menu with 'Select an Option'), and 'Manager' (dropdown menu with 'Select an Option').

The screenshot shows the 'Add Member' form in Relgo Automation Studio. The interface includes a teal header with the 'Relgo Automation Studio' logo and user information 'Welcome : maneasha.reddy' and 'Signout'. A left sidebar lists 'Automation Tools' with icons for process.io, automate.io (highlighted), deploy.io, elasticapp.io, and story.io. The main form area contains the following fields:

- manager: Select an Option (dropdown)
- Contact Address: [Text Input]
- *Location Name: [Text Input]
- Relation Type: Select an Option (dropdown)
- *Employee Code: [Text Input]
- *Member Group: Select an Option (dropdown)

Below the form, there is a section labeled 'Select Tasks And Permissions' and an 'Add Member' button.

- Initialization is used for minimum data setup like yearly holidays list, sandwich policy. User can setup data by form wise or in bulk. When you click on “Show” you will get particular scenarios and forms which the data is added.

Login to RAS → Automate.io → Initialization → Initialization.

The screenshot shows the 'Initialization' page in Relgo Automation Studio. The header and sidebar are consistent with the previous screenshot. The main content area has a teal navigation bar with tabs for 'Setup', 'Organization', 'Initialization' (active), 'Test', and 'Go Live'. Below this, there is a breadcrumb 'Select Feature > Update Scenario'.

The main form area contains two file upload sections:

- Upload Initial data: [Choose File] No file chosen [Info icon]
- Upload Scenario Document: [Choose File] No file chosen [Info icon]

Below these sections are a 'Show' button and a 'Get Initial Data SetUP' button.

PROCESSES DATA TESTING

- RAS enables to test the data of processes. First curate the processes for the organizational process and install the processes in development cloud and then test the processes data by adding the sample data. Processes data contains groups, networks, forms, roles and scenarios.
- In processes testing, test the processes wise scenarios and tasks. To test the scenarios, login into employee account and get automate it. Then click on 'Test' and select the Role, the scenarios will display with the tasks. By clicking on tasks, the forms will open in the container. By adding sample data to the forms, processes data testing can be done. If any processes data is not accurate or data missed, the issues will raise while adding the data to the forms. To test the forms with the sample data, go to 'Automate' and click on Test.

PROCEDURE

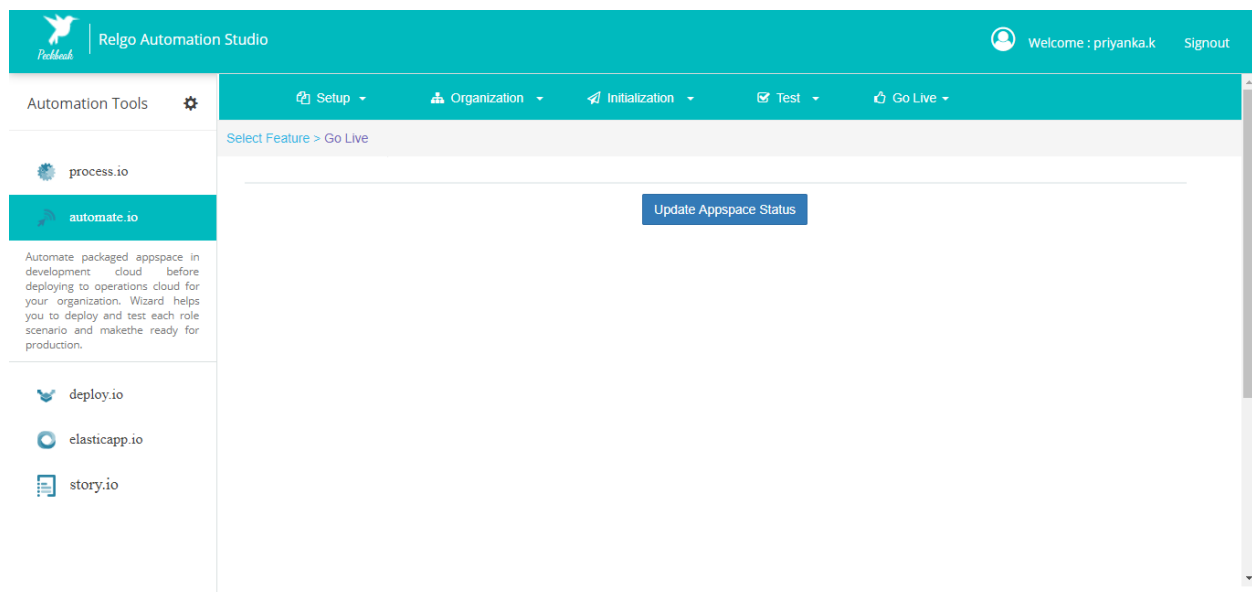
- Click **Test** menu in **Automate Operation** main menu.
- From Here, Automate engineers will do the process. In “Select Role”, only the assigned role will be visible to particular person which are added in “Add Members”.
- Select Automate, select role and will display all scenarios pertaining to role with status as **New**
- Test each scenario with data and show case the scenario to customer and if the customer requirements are met and then update the status as **Customer validation completed** and exit the scenario.
- Likewise validate for all scenarios and update the status accordingly.
- Here is the **Status** List and self-explanatory
 - a. New
 - b. In progress
 - c. Customer validation completed
 - d. Pending
 - e. Having Issue
- Finally once all scenarios are validated, click **Update Scenario** button.
Login to RAS → Automate.io → Test → Automate.

The screenshot displays the Relgo Automation Studio web interface. At the top, there is a teal header with the 'Pekmah' logo, the text 'Relgo Automation Studio', and a user profile section showing 'Welcome : maneasha.reddy' and a 'Signout' link. Below the header is a navigation bar with menu items: 'Automation Tools' (with a gear icon), 'Setup', 'Organization', 'Initialization', 'Test', and 'Go Live'. The main content area is titled 'Select Feature > Update Scenario'. It features a 'Select Role' label followed by a dropdown menu currently showing 'Select an Option'. Below this is a blue 'Update Scenario' button. On the left side, there is a sidebar with 'Automation Tools' and a list of integrations: 'process.io', 'automate.io' (highlighted in teal), 'deploy.io', 'elasticapp.io', and 'story.io'. A descriptive text for 'automate.io' reads: 'Automate packaged appspace in development cloud before deploying to operations cloud for your organization. Wizard helps you to deploy and test each role scenario and make the ready for production.'

ROLE SCENARIO TESTING

- Once if status has changed to customer validation completed then user can go for “Live”.
- Go Live is used to check the status whether the customer has received complete data or not.
- Select **Go Live**, Displays with details process, scenario, role and scenario exit status and app space status as **pending**.
- If the scenario exit status is **Customer validations completed** and then update the **Update App space Status** as **Customer validations completed**.
- Likewise validate for all app space and update the status accordingly.
- Here is the **Status** List and self-explanatory
 1. New
 2. In progress
 3. Customer validation completed
 4. Pending
 5. Having Issue

Login to RAS → Automate.io → Go Live → Go Live



The screenshot displays the Relgo Automation Studio web interface. The top navigation bar is teal and contains the Relgo logo, the text 'Relgo Automation Studio', and a user profile section with 'Welcome : priyanka.k' and a 'Signout' link. Below the navigation bar is a secondary teal bar with menu items: 'Automation Tools' (with a gear icon), 'Setup', 'Organization', 'Initialization', 'Test', and 'Go Live'. The main content area has a breadcrumb trail 'Select Feature > Go Live' and a central blue button labeled 'Update Appspace Status'. On the left side, there is a sidebar titled 'Automation Tools' with a gear icon, listing several integration tools: 'process.io', 'automate.io' (highlighted in teal), 'deploy.io', 'elasticapp.io', and 'story.io'. A descriptive paragraph for 'automate.io' reads: 'Automate packaged appspace in development cloud before deploying to operations cloud for your organization. Wizard helps you to deploy and test each role scenario and make the ready for production.'