

HRMS- DMS – User Story



Submitted To:

Prepared By:

Technomark Solutions LLP

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TechnoMark Solutions LLP

Document Control

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Distribution:	Name	Title
Submitted to:		

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Version No.	Author	Issuer	Updated Date	Change / Update
0.1	Soniya Thakur	Hardik Gajjar	May 27, 2024	Initial Draft

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1. Project Purpose

This project's purpose is to develop a complete end-to-end Document Management System that will allow users/candidates to upload required documents. Whereas admin on the other hand can download the document, accept/reject the documents, and manage the users and their documents in the system.

2. Change Request Details HRMS-DMS

1. Shorten the invite link

Original Scope

- The send invite link was too long and not appropriate for user experience
- Previous link: <https://hrms-cm.vercel.app/request?id=27F4CACB-CC0A-4A1F-90E8-5A726895EA8A>

New Scope

- Now the send invite link has been shortened for better user experience.
- Latest Link: <https://hrms-cm.vercel.app/request?id=B09C4558>

2. Middle Name to be kept mandatory

Original Scope

- User/Candidate may have the same name and surname so, for the uniqueness of the users we need to have a middle name field.

The screenshot displays the 'Manage Users' section of the HRMS-DMS application. A modal titled 'Enter User Details' is open, allowing for the creation of a new user. The modal includes fields for 'First Name *', 'Last Name *', 'Email *', and 'Contact Number *'. Below these fields are radio buttons for 'Admin' and 'Candidate', with 'Candidate' selected. At the bottom of the modal are 'CANCEL' and 'SUBMIT' buttons. The background shows a table of existing users with columns for Name, Role, and Action. The table lists several users, all with the role of 'Candidate'. The interface also includes a sidebar with navigation options like Documents, Manage Users, Control Panel, and Settings, and a top header with the title 'Audit Document Tracking' and a user profile icon for Jainam Vora.

Name	Role	Action
devesh sheth	Candidate	⋮
Bhvaik Shah	Candidate	⋮
harsh shah	Candidate	⋮
urvish kadia	Candidate	⋮
urvish kadia	Candidate	⋮
bhargav lakhani	Candidate	⋮

New Scope:

- Adding the middle name is now mandatory for the uniqueness of the admin/candidate.

The screenshot shows the 'Manage Users' modal in the Technomark HRMS-DMS application. The modal is titled 'Enter User Details' and contains the following fields:

- First Name *
- Middle Name *
- Last Name *
- Email *
- Contact Number *
- Role: ☐ Admin ☒ Candidate

The background shows a table of users with columns for Name, Role, and Action. The table contains the following data:

Name	Role	Action
devesh sheth	Candidate	
Bhvaik Shah	Candidate	
harsh shah	Candidate	
urvish kadia	Candidate	
urvish kadia	Candidate	
bhargav lakhani	Candidate	

3. Control Panel: Allow Multiple Download

Original Scope

- The current system does not support multiple downloads at a time. Admin users have to download documents one by one only.

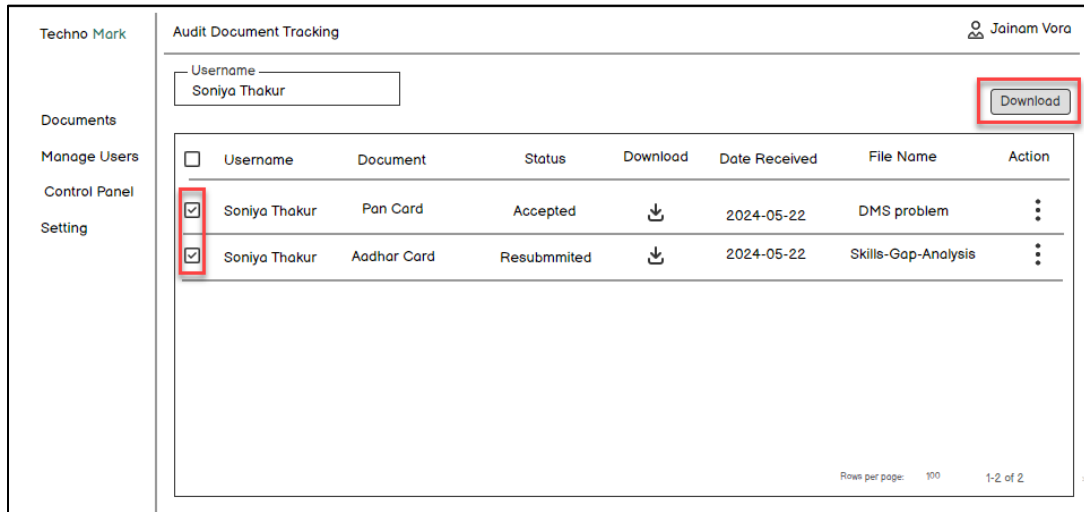
The screenshot shows the 'Audit Document Tracking' page in the Technomark HRMS-DMS application. The page has a search bar for Username (Soniya Thakur) and a table of documents. The table has the following columns: Username, Document, Status, Download, Date Received, File Name, and Action. The table contains the following data:

Username	Document	Status	Download	Date Received	File Name	Action
Soniya Thakur	Pan Card	Accepted		2024-05-22	DMS problem discussion (3) c	
Soniya Thakur	Aadhar Card	Resubmitted		2024-05-22	Skills-Gap-Analysis-Template	

New Scope

- Now, the admin user will get a checkbox beside the user's name.
- As the user selects the checkbox, the "**Download**" button will appear on the screen and the user will be able to download selected documents.
- File will be downloaded in a zip file containing the folder name (Document Name) and file in it.
- The name of the downloaded zip folder should have the name of the user

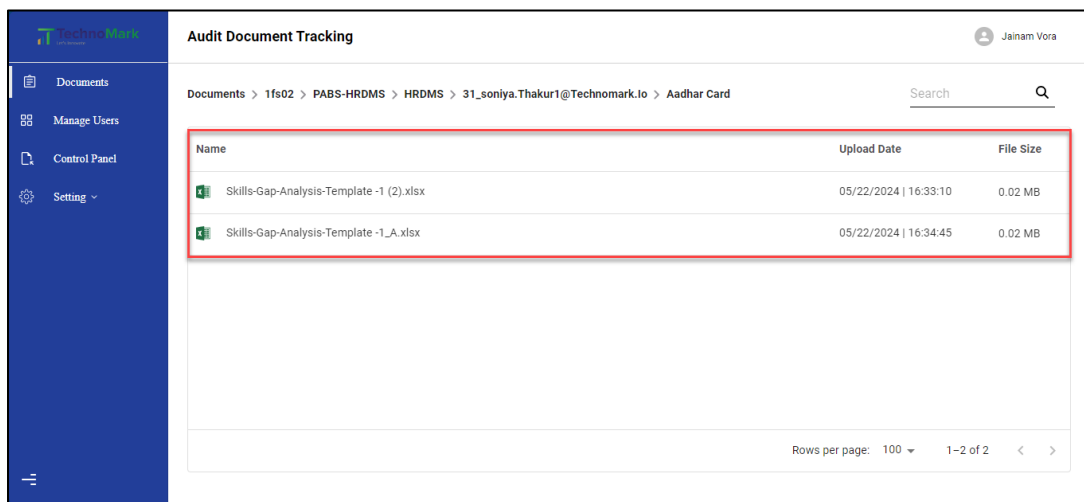
- E.g., you are downloading files for the user Soniya Thakur, hence the downloaded zip file should be named **SoniyaThakur.zip**.



4. Documents: Unable to identify rejected documents

Original Scope

- Admin user is not able to identify from the list of documents that which file is rejected/accepted.



New Scope

- Documents accepted by the admin user will be listed in the document tab.

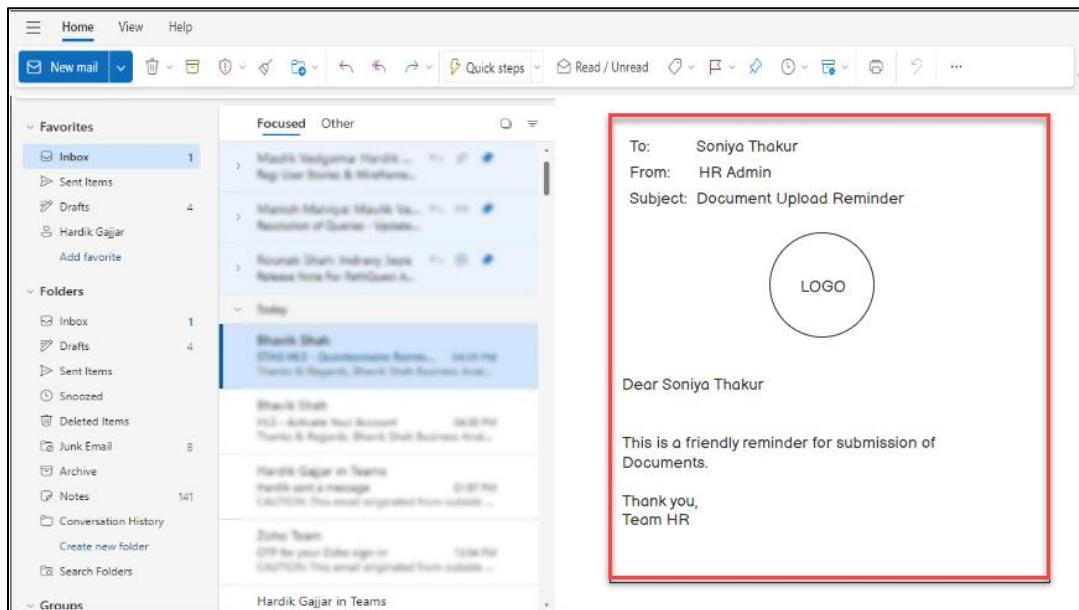
5. Email Notification: Send Reminder

Original Scope

- The system has no functionality to send reminders to users/candidates for not uploading any document(s).

New Scope

- On the “**Manage User**” screen by clicking on the three dots, the admin user will get an option of “**Send Reminder**”.
- The “**Send Reminder**” button will only be enabled if the admin user has once sent an invitation to that particular user.
- By clicking on “**Send Reminder**” an email notification will be sent to the selected user.
- The Email Template should have a logo of the **Pacific Group of Companies**.



6. Manage user: Document Status

Original Scope

- The system has no functionality to manage the status of all the documents that have been submitted/pending.

New Scope

- The system should display the column name as “**Document status**”
- It should display below mentioned status type
 - Pending
 - Completed
- By default, the system should display “**Pending**” status and it should remain the same till the end user uploads all the document.
- Once all the documents are uploaded the status must be changed to “**Completed**”.

Techno Mark	Audit Document Tracking						
	Jainam Vora						
Documents	Manage User						
Manage Users	Add user						
Control Panel							
Setting							
	Name	Email	Mobile	Status	Role	Document Status	Action
	urvish kadia	urvish@yopmail.com	1233243434	Active	Candidate	Pending	⋮
	urvish kadia	urvish.kadia@yopmail	1234567898	Active	Candidate	Pending	⋮
	bhargav lakhani	bhargav@yopmail.com	1234564323	Active	Candidate	Pending	⋮
	Soniya Thakur	devesh.shah@yopmail.com	1234567890	Active	Candidate	Completed	⋮
	devesh shah	devesh.shah@yopmail.com	5232323213	Active	Candidate	Pending	⋮
	Jeet kumar	jeet@yopmail.com	5432112345	Active	Candidate	Completed	⋮
	Rows per page: 100 1-9 of 9 < >						

7. Upload Document: End User

Original Scope

- The system allows users to update documents one on the other, before accepting/rejecting the document.

New Scope

- The system should display the attached file's name irrespective of the status.
- If the document is in uploaded/rejected/resubmitted status the user can reupload the file.
- By clicking on the "X" the user can remove the uploaded and attach a new file. The newly uploaded document name will be displayed.
 - The latest uploaded document will be displayed in the control panel of that particular user.

TechnoMark			
Document Name	Uploaded Files	Upload Date	Status
Pan Card	<input type="text" value="PanCard.pdf"/>	2024-05-22	Accepted
Aadhar Card	<input type="text" value="Adhar card.pdf"/> <input type="button" value="X"/>	2024-05-27	Resubmitted

- If the user removes the attachment and does not upload a new document, the system should not display any documents in that user's control panel.

TechnoMark			
Document Name	Uploaded Files	Upload Date	Status
Pan Card	<input type="text" value="PanCard.pdf"/>	2024-05-22	Accepted
Aadhar Card	<input type="text" value="Drag and drop your attachment"/>	2024-05-27	Resubmitted

Note: Once the document has been accepted, the user will not be allowed to perform any action.

- If the admin user rejects any document user has to click on the “X” button and remove the rejected file from the interface and then only he will be able to upload/drag & drop a new document.

3. Acceptance of CR

TECHNOMARK SOLUTIONS LLP	PACIFIC GROUP OF COMPANY
SIGNATURE	SIGNATURE
PRINT NAME: MR. SURESH KALAL	PRINT NAME:
TITLE: - CTO	TITLE:
DATE: MAY 27, 2024	DATE: MAY 27, 2024