HRMS- DMS – User Story

Submitted To:

Prepared By:

Technomark Solutions LLP

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TechnoMark Solutions LLP

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Document Control

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Author(s):	**Name**	**Title**
	Soniya Thakur	Business Analyst
Issuer(s):	**Name**	**Title**
	Hardik Gajjar	Lead Business Analyst
Distribution:	**Name**	**Title**
Submitted to:		

Version History

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.

New Scope:

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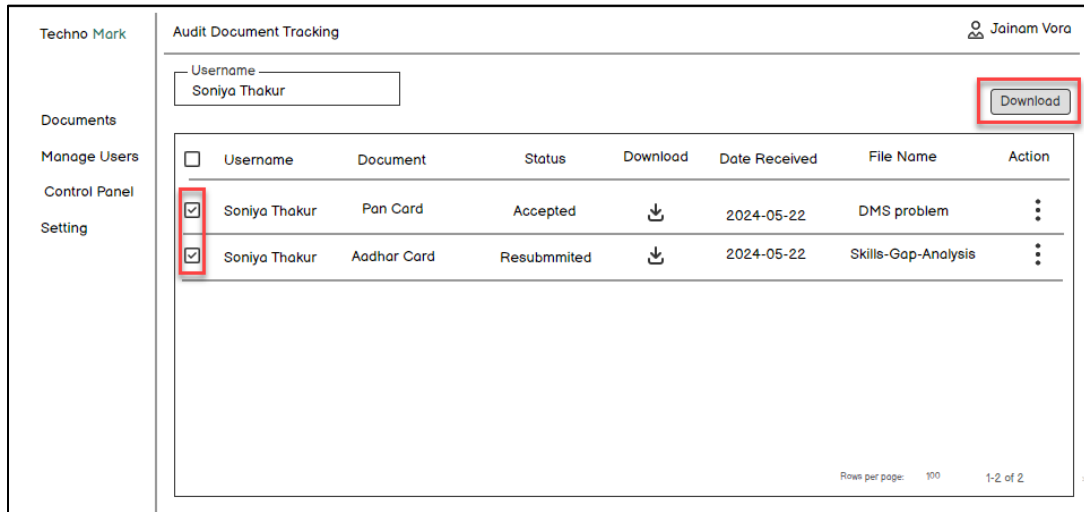

New Scope

- 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.
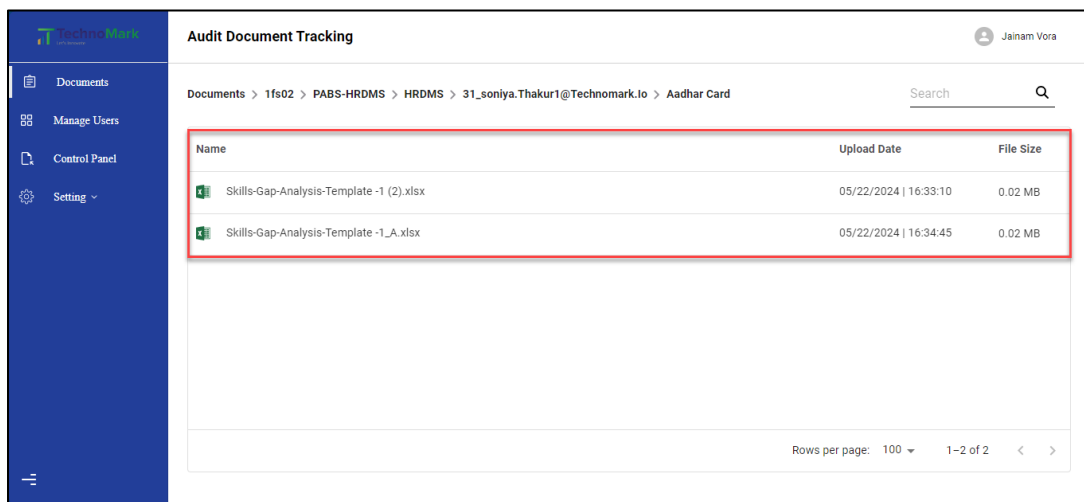- The name of the downloaded zip folder should have the name of the user

o 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.**
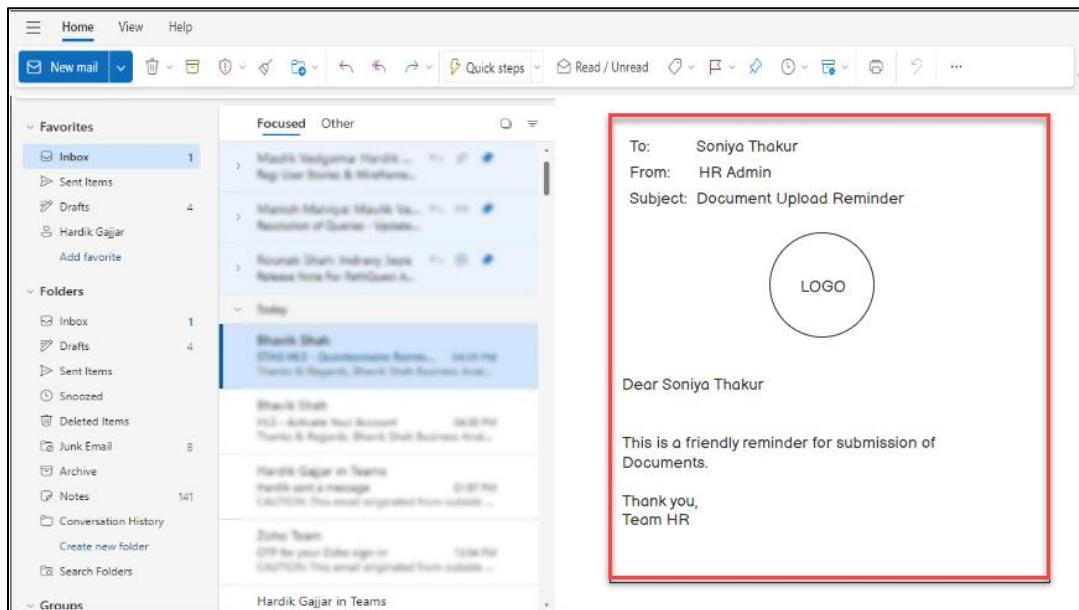
6. Manage user: Document Status

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**".

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.
  - o The latest uploaded document will be displayed in the control panel of that particular user.

- 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.

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.

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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