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Posted By : Navika Desai
D86
Date & Time : 28-01-2016 12:11:PM
Requirements - 28.01.2016

Discussed with Kailash, below is the list of new requirements to be implemented in resoftech. Please share timelines for each and we shall then decide on priorities:

1) Option for exporting a locked pdf from the system.
a. Same password for all pdfs
b. Different password for different pdf template
c. We will also need to consider the password in case of a combined pdf report (with or without summary)
2) Point 1 & 2 of the attached mail - FE & Tele to be separate users with separate and independent functionality
3) Feasibility of a summary report for one client as per the attachment (refer excel attachment 'HDB REPORT FORMAT')
4) Option for moving cases across centers with center_id column in import file/manually selected instead of pincode.
a. Need to discuss on the option for locations having sub-centers.
5) Error register module
a. Here users will manually add the errors identified for each case. Hence the module should be a data entry type module with case ID, type of error, error done by (employee), error identified by (employee), error remark, rectification done if any, etc..
b. Error report (detailed MIS and count MIS)
6) Quality Check module
a. Search option for all open and closed cases for doing QC (no list to be loaded by default)
b. Edit under this will have additional fields as
i. Type of QC (Field QC, Tele QC, Sup/rater QC). Option for assignment for FE/Tele QC
ii. QC done by (employee – auto captured as per who submits the case), designation of the employee to be auto captured in next field
iii. QC Sup (employee)
iv. Reason for QC

v. QC Finding/remarks
vi. Payout to be given for new FE – yes/no. Payout to be calculated accordingly
vii. Status after QC (positive, negative, etc)
c. QC report (detailed MIS and count MIS) (billing MIS+QC MIS)
d. New case ID will not be created for QC cases

Posted By : Kailash Kumawat
D86
Date & Time : 29-01-2016 04:30:PM
Let you know timeline next week by wednesday(3-jan)
Posted By : Kailash Kumawat
D86
Date & Time : 29-01-2016 05:54:PM
report for point 3

HDB REPORT FORMAT.XLS
⬇ Download
Posted By : Kailash Kumawat
D86
Date & Time : 04-02-2016 01:48:PM
please find timeline

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pamac additionals.xls
⬇ Download
Posted By : Navika Desai
D86
Date & Time : 15-02-2016 10:18:AM
The next task from today is:
2) Point 1 & 2 of the attached mail - FE & Tele to be separate users with separate and independent functionality
Closure date - 23-Feb-16 (15-23, 7 days)

Please let me know in case of any deviations in this.

Posted By : Navika Desai
D86
Date & Time : 22-02-2016 10:31:AM
The new timeline for above point is 26-Feb-16 as the team was monitoring and working on server performance on 17,18,19.
Posted By : Rakhi Gaud
D86
Date & Time : 23-02-2016 12:14:PM
Following will be the process for change 'FE & Tele to be separate users with separate and independent functionality'.

1. Change in activity master module at admin side.
- Add checkbox option named as 'Do you want separate tele operation?'.
2. The above setting will be applicable for all products and verification types with selected activity.
3. Change in flow at user side
- After adding new case(using import/add new case options) the case will be visible in Tele Assignment tray first(Not visible in any other tray).
4. Tele will book appointment, verify it and change the status from this tray after that the case will be visible in FE Assignment tray(there will be no change in further process).
5. Change in tbl_cases

- Add 3 columns to save the information related to Tele same as FE.
tele_id, tele_assign_date, tele_submit_date.

We have some queries
1. After verifying the case from Tele Assignment tray, will it be visible in both the trays or only visible in FE Assignment tray?
2. To edit the case from Tele Assignment tray, the layout(form) will be fix with required fields or it will show the assigned template?

Please confirm the process.

Posted By : Rakhi Gaud
D86
Date & Time : 25-02-2016 10:17:AM
Please confirm the above process for point 'FE & Tele to be separate users with separate and independent functionality'.
Posted By : Navika Desai
D86
Date & Time : 25-02-2016 01:14:PM

 4. Tele will book appointment, verify it and change the status from this tray after that the case will be visible in FE Assignment tray(there will be no change in further process).
for this point, the value of the field (appointment_status) has to be 'Appt fixed' for case to move in FE tray.

1. After verifying the case from Tele Assignment tray, will it be visible in both the trays or only visible in FE Assignment tray?

It will be visible in FE assignment tray only.

2. To edit the case from Tele Assignment tray, the layout(form) will be fix with required fields or it will show the assigned template?

please elaborate further, did not understand

Also,

a. there will have to be tele-assign status as - Assign (for assigned cases and cases being worked on), Close (for cases with 'Appt fixed').

b. If the FE selects the appointment status as 'Appt dishonored' then the case to go back to tele assignment tray after submitting to the web system and to be removed from FE assignment tray

c. date and time of tele-caller attempts to be system captured and auto-populated in the field.

Posted By : Rakhi Gaud
D86

Date & Time : 02-03-2016 08:43:AM
1) Option for exporting a locked pdf from the system.

- Changes in pdf template design module(at admin side) to add password for pdf.It will allow alphanumeric value only(It has been discussed with Navika).
- At user side if there are 2 pdf of 2 different templates getting merged then it will set password if both templates having same password otherwise it will show the error message and report will not get downloaded.

This point have been completed, Please verify it on demo site.

Posted By : Rakhi Gaud
D86
Date & Time : 02-03-2016 12:05:PM
FE & Tele to be separate users with separate and independent functionality.
- As per discussion with Navika the setting in activity master will be applicable to all products and VTs under that activity.
Posted By : Navika Desai
D86
Date & Time : 02-03-2016 02:20:PM
1) Option for exporting a locked pdf from the system.

this has been tested ok on demo site, please upload on live site

FE & Tele to be separate users with separate and independent functionality.
- As per discussion with Navika the setting in activity master will be applicable to all products and VTs under that activity.
-Yes, this is as discussed

Posted By : Rakhi Gaud
D86
Date & Time : 03-03-2016 09:55:AM
1) Option for exporting a locked pdf from the system.

- Changes related to this point is uploaded on live site.
Please verify and confirm.
Posted By : Navika Desai
D86
Date & Time : 03-03-2016 11:26:AM
1) Option for exporting a locked pdf from the system.
 - tested ok on live
Posted By : Navika Desai
D86
Date & Time : 03-03-2016 11:39:AM
Where are we on separating FE & Tele?

what is the expected closure date?
Posted By : Rakhi Gaud
D86
Date & Time : 03-03-2016 04:57:PM
Hi Navika,

separating FE & Tele -

It will take 7 working days to complete this task with testing on local server and demo site.
Includes following tasks -
- Changes in view(add/edit case) page to show calling section(working on it).
- Create and save the details in new table and changes in controller file related according to it.
- Changes in existing conditions of list of assignment pages of 'FE Asignment' and 'Tele Assignment' module.

Posted By : Rakhi Gaud
D86
Date & Time : 16-03-2016 04:59:PM
Hi,

separating FE & Tele :
Please find attached sheet of flow of visibility of cases.

[x] FE and Tele separate operation.xls
⬇ Download
Posted By : Navika Desai
D86
Date & Time : 22-03-2016 07:05:PM
Hi,

Sorry for delayed response.

After FE submit, the case will either move to the Supervisor rater or move back to Tele tray (to the earlier Tele caller) basis the status.

This was discussed during the meeting on 1-Mar, we need to have this option as well.
Posted By : Super Admin
D86
Date & Time : 04-04-2016 11:58:AM
Kailash Or Rakhi can we close this?
Posted By : Navika Desai
D86
Date & Time : 09-04-2016 11:54:AM
Question is closed.
Reply   Cancel