



- [Dashboard](#)
- [My Projects](#)
- [Holiday List](#)
- [More Help](#)
- [R](#)
- [Ramakrishnan V](#)
[Manage Profile](#) [Preference](#) [Change Password](#)
[Logout](#)

Requirements (PAMAC (Cloud Version))

[Home](#) [Requirements](#) [Discussions](#) [Documents](#) [Daily Updates](#) [Changes](#) [Bugs](#)

Posted By : Navika Desai

R25

Date & Time : 21-02-2018 05:02:PM

Applicant document upload

Please share feasibility and number of days required for the below development:

1. Client will initiate cases in RES & PAMAC supervisor will update and initiate the process of contacting the applicant and collecting document
2. Supervisor will update the list of documents that are required basis the checks to be initiated. Supervisor will trigger SMS to candidate & mail to client & applicant. Mail content will be different for applicant mail & client mail
3. Notification email will contain the list of documents to be submitted by applicant. This list will be as selected by the supervisor. It will also contain portal login & password
4. Applicant will login and will be able to see the list of documents to be submitted & few fields data entry to be done
5. Applicant will have option to upload the documents and submit
6. On submit, the portal will be inactive for the applicant
7. The supervisor shall check the completeness of the received documents and accept or return the case.
8. On returning of documents, mail & SMS will be sent to applicant for the missing documents resubmission

Posted By : Bhavana Pachpande

R25

Date & Time : 26-02-2018 08:09:AM

Will discuss with Sir Kailash and let you know by tomorrow.

Posted By : Navika Desai

R25

Date & Time : 27-02-2018 12:48:PM

It was mentioned as 'Today' and then changed as 'Tomorrow' later. Please share today without any further postpone.

Posted By : Bhavana Pachpande

R25

Date & Time : 27-02-2018 01:43:PM

Queries :

As per discussion with Sir Kailash, following queries are noted. Please check :

- 1) Is this for regular case operation. (Like : import or add, case verification)
- 2) Is the client here same as "Designation" client present in the current system if not then which client are we talking about.
- 3) Where is the list of Document ? Will it be managed from masters.
- 4) Here, will the client login and add case to the system ?
- 5) SMS/Email module will be required for sms/email format or will format be fixed in coding ?
- 6) There is already login for Supervisor. So is new login to be created for Client and Applicant.

Posted By : Navika Desai

R25

Date & Time : 27-02-2018 02:00:PM

- 1) Is this for regular case operation. (Like : import or add, case verification)

-Yes

- 2) Is the client here same as "Designation" client present in the current system if not then which client are we talking about.

-Yes its the same

- 3) Where is the list of Document ? Will it be managed from masters.

-Will be updated by the supervisor. A default list from master will be shown and supervisor will select the documents list required for that case

- 4) Here, will the client login and add case to the system ?

-Yes. It can be imported by Supervisor also

- 5) SMS/Email module will be required for sms/email format or will format be fixed in coding ?

-Will have to be managed by masters. This will vary from template to template

- 6) There is already login for Supervisor. So is new login to be created for Client and Applicant.

-Client is already present. New login for Applicant

Posted By : Bhavana Pachpande

R25

Date & Time : 27-02-2018 05:10:PM

Further Queries :

7) Point1. Client will initiate cases in RES & PAMAC supervisor will update and initiate the process of contacting the applicant and collecting document.

- a) How will the client initiate cases in RES, does it means case import or add by logging in to the system ?

- b) How will the Supervisor initiate the process of contacting and collecting document ?

Will Supervisor edit the case "Select the document" from a document dropdown (multiple checkboxes)(masters will be used to create dropdown checkboxes) to be updated by applicants login(newly created). We can give a send button where a email or sms will be send to client and applicant for uploading the document after login.

8) Point2 : Supervisor will trigger SMS to candidate & mail to client & applicant. Mail content will be

different for applicant mail & client mail.

a) Will create a new module for this like Auto SMS and Email module. Is it ok.
Same in case edit will give the document multiselect dropdown and 2 buttons send sms and send email like for auto sms and email module.
SMS format can be provided beforehand for testing.

b) Who is candidate here ? Will he have login too. Does he need to update document also.

9) Point3 : Notification email will contain the list of documents to be submitted by applicant. This list will be as selected by the supervisor. It will also contain portal login & password

a) Here the mail will contain list of documents checked by Supervisor to be uploaded by applicant.

i) Will candidate also receive this in sms ? Will he have login to upload documents too.

ii) Will Client also receive this mail to update document? (No sms for client)

iii) Will his mail format be different from that of applicant mail format? (No sms for Applicant)

b) For each case when edited and send to applicant.

i) Will he always receive password and login id.

ii) What will applicants login contain meaning menus.

iii) Will he have logout change password option ?

10) Point4: Applicant will login and will be able to see the list of documents to be submitted & few fields data entry to be done.

a) Case update menu (suggest name) will be shown to Applicant to upload documents. This menu will contain a list of cases. Edit function only for the list.

Suggest what to be shown in the case list. Like Caseid , Applicant's Name , Ref No.. etc. will there be search functionality also. If yes then what ?

b) When edit case, according to the checkbox selected by supervisor for that case, browse buttons will appear to upload document.

c) **Few fields data entry to be done.** Where will we select the fields of cases to be edited by applicant? Will be require new module for this to select template wise field to be edited or we can add it in the module that will create for SMS/Email ?

5. Applicant will have option to upload the documents and submit. ok**6. On submit, the portal will be inactive for the applicant.**

a) Will the email containing username and password won't be used again for login. If yes will it expire once used no time validity.

b) If multiple mails are send to the applicant for different cases then every login id and password and link will be different ?

c) What will happen if applicant uploads the document and submits and the link(login) is invalidated. But supervisor accidentally again clicks the Send email button in case edit, a new link will be created with new id and password and send to the applicant with same fields and document upload browse button.

Now when applicant again submits the case, will it update over the older documents and fields. Also will he be able to see his old updated fields and document uploads.

d) Here, are the document upload fields already present in case table or new table is to be used for document upload.

7. Point7 : The supervisor shall check the completeness of the received documents and accept or return the case.

a) Where will he check the completeness of the documents, in case edit or a new menu is to be given like applicant case verification. Where only submitted cases by applicant will be shown. On edit will show the documents and the extra case fields updated by applicant.

8. Point8 : On returning of documents, mail & SMS will be sent to applicant for the missing documents resubmission.

a) Where will supervisor select returning of document and how ?
If resent via email , new link will be generated for login id and password.

Timeline of development will be prepared once the entire flow or process is updated. Based on the amount of changes to be done we will be able to mention timeline for this point as it is little bigger.

Please add you suggestion and replies to the mentioned queries.

Posted By : Navika Desai

R25

Date & Time : 27-02-2018 05:38:PM

1) a) Import

b) Yes

2) a) okay

b) candidate is applicant who will login and submit the mentioned documents

3) a) i) List of doc not required in SMS, but yes in mail. He will login to upload docs

ii) Client will receive a separate mail as a notification that so and so candidate has been contacted and process is initiated

iii) Yes

b) i) Yes

ii) No menu, only the page showing the fields for test inputs and file uploads.

iii) Yes. Its not mandatory to provide this

4) a) This is not required. As the candidate should only see case edit page of one case only with fields for text input & doc upload. Just to clarify, applicant / candidate will have to edit and save only one case (here the applicant will upload his own documents for initiating their verification as per Client requirement). Hence menu, case list field, case list - all not required

b) Yes

c) Fields will be decided in template. I suggest we can add applicant as a designation and fields that will be visible and editable, read only to the applicant will be selected and designed in the template design menu

6) a) Okay

b) Applicant will receive only one case (his own)

c) Supervisor to trigger email again with new password. Overwrite the earlier documents. Whether the applicant will be able to see previously uploaded documents - this is optional, can be designed as feasible

d) existing fields only to be used as image & PDF field type

7) a) Case edit only, by downloading all attachments.

8) a) Case edit only, he will retrigger the email and sms and link will be sent to applicant

Query: How will the supervisor be notified of applicant submission of case?

Posted By : Bhavana Pachpande

R25

Date & Time : 05-03-2018 08:20:AM

Currently i am working on R22. Will discuss with Sir Kailash and let you know once R22 is uploaded in demo server.

Posted By : Navika Desai

R25

Date & Time : 05-03-2018 12:15:PM

Okay

Posted By : Bhavana Pachpande

R25

Date & Time : 13-03-2018 04:47:PM

Point 3) > b) > ii) No menu, only the page showing the fields for test inputs and file uploads.

Reply : What will happen if multiple cases have same applicant email_address.

Will each time a new link will be generated and send to applicant for every trigger in case id edit.

And if same case fields are present for update by applicant then they will overwrite.

Point 4) > c) Fields will be decided in template. I suggest we can add applicant as a designation and fields that will be visible and editable, read only to the applicant will be selected and designed in the template design menu.

Reply : So there will be change in template design menu ?

Also fields editable to applicant will be according to this selection in template design.

Need to check the table structure for the additional flag to be included.

Point 6) > b) Applicant will receive only one case (his own)

Reply : But if supervisor presses the button more than once everytime a new link will be generated invalidating the old.

Also if applicant is common for 2 or more cases link will be different.

Point 6) > c) Supervisor to trigger email again with new password. Overwrite the earlier documents.

Reply : Yes , but suppose applicant is uploading the document and meanwhile Supervisor again presses the send email button then when applicant submits the form will it be discarded or will it be accepted and again the new link has to be opened by applicant and update again.

Whether the applicant will be able to see previously uploaded documents - this is optional, can be designed as feasible : ok

Query: How will the supervisor be notified of applicant submission of case?

Reply : He will be able to see this in case edit only after applicant uploads the form.
There is no notification service added or will have to use another table to store some flag that applicant has updated the document with caseid.
Now this table will be checked after every 15 or 10 min like casepopup then,
we can show it in case popup to Supervisor only (will fix supervisor id here for popup)

Posted By : Navika Desai

R25

Date & Time : 14-03-2018 11:51:AM

Point 3) > b) > ii) No menu, only the page showing the fields for test inputs and file uploads.

Reply : What will happen if multiple cases have same applicant email_address.
Will each time a new link will be generated and send to applicant for every trigger in case id edit.
And if same case fields are present for update by applicant then they will overwrite.

- Multiple cases will not have same email address. If they do then each time a new link will be generated and send to applicant for every trigger in case id edit.

Point 4) > c) Fields will be decided in template. I suggest we can add applicant as a designation and fields that will be visible and editable, read only to the applicant will be selected and designed in the template design menu.

Reply : So there will be change in template design menu ?
Also fields editable to applicant will be according to this selection in template design.
Need to check the table structure for the additional flag to be included.
- Yes

Point 6) > b) Applicant will receive only one case (his own)

Reply : But if supervisor presses the button more than once everytime a new link will be generated invalidating the old.

Also if applicant is common for 2 or more cases link will be different.

-Yes

Point 6) > c) Supervisor to trigger email again with new password. Overwrite the earlier documents.

Reply : Yes , but suppose applicant is uploading the document and meanwhile Supervisor again presses the send email button then when applicant submits the form will it be discarded or will it be accepted and again the new link has to be opened by applicant and update again.

-As per system feasibility

Query: How will the supervisor be notified of applicant submission of case?

Reply : He will be able to see this in case edit only after applicant uploads the form. There is no notification service added or will have to use another table to store some flag that applicant has updated the document with caseid. Now this table will be checked after every 15 or 10 min like casepopup then, we can show it in case popup to Supervisor only (will fix supervisor id here for popup)

- We can just assign a search option in list with status of candidate submit (assign, submit, pending) and a color on case submit (similar process as we have for FE submission)

Posted By : Bhavana Pachpande

R25

Date & Time : 14-03-2018 02:38:PM

1) Reply

Point 4) > c) : Ok we can add a new field in template design for each fields a checkbox will appear with label "Use field for applicant form".

On tick the checkbox, the field if found in the case edit will be used in the form which will be shown to the applicant.

2) Query: How will the supervisor be notified of applicant submission of case?

- We can just assign a search option in list with status of candidate submit (assign, submit, pending) and a color on case submit (similar process as we have for FE submission)

Reply : a) Where will the color be decided will it be fixed.

Here will have to add three more field in case table if color is fixed for submitted cases.

One for status and another for assigned date and submit date.

b) Also if send email is done once then status will be 'assigned'. Now applicant submits the form the status is "submitted" and case color changes in list. Now Supervisor again sends email for the same case to Applicant, status will again update to "assigned". Older status will be overwritten and also the date fields. Submit date will be blank.

c) Suggestion : It is better we do not add new fields to case table. Instead we maintain another table to store "status", "assigned_date" and "submitted_date".

d) This will be shown inside case edit. With the number of times the case was send to the applicant. Supervisor can edit the case and check this information.

This will also eliminate the addition of fields to case table.

Color cannot be shown in the list , in this process. User will have to edit to check the case doc has been updated or not.

If you have any existing field in case table already (total 3 fields), then this process can be ignored and we can use those fields.

e)Also For color. If fe submits the case color changes, now if applicant submits the case will the fe color be overwritten and vice versa.

Note :

The more the case table column increases more will the queries run slow. For next optimization process, it is suggested to delete some columns from case table which are not used or are rarely used.

3) Also can we use existing Auto SMS/Email module for sending Sms or Email to applicant and client. We can add a new trigger in dropdown "Label Name".

as "Send Applicant form" or suggest any name.

Posted By : Navika Desai

R25

Date & Time : 14-03-2018 03:07:PM

Okay with both points

Posted By : Bhavana Pachpande

R25

Date & Time : 14-03-2018 03:46:PM

Will prepare a complete flow and update.

It will take 20 days till demo server.

As changes will be on existing code no separate module. Will have to test also that changes do not affect existing module like template design, case edit, auto sms/email, login for new applicant with link and login form and case edit form.

Form has to be secured so that no one can access it using the url directly after login also (security checks).

Posted By : Bhavana Pachpande


R25

Date & Time : 17-04-2018 04:17:PM

A flow and process has been prepared and attached as text file. Please check and suggest changes if any before development can start.

Query :

Do you want to store case history for applicant form submit also ?

 Applicant Doc upload -- Process and Flow.txt

 Download

Posted By : Super Admin

R25

Date & Time : 15-11-2018 10:30:AM

Can we close this?

Posted By : Bhavana Pachpande

R25

Date & Time : 14-02-2019 11:21:AM

Hello,

Please let us know if we need to put this point on hold or close it ?

Posted By : Sandeep Ghuge

R25

Date & Time : 14-02-2019 04:50:PM

Hi Bhavana,

Please hold this point.

Posted By : Kailash Kumawat

R25

Date & Time : 19-02-2019 09:20:AM

Requirement is closed.

 Reply

 Cancel