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Requirements (PAMAC (Cloud Version))

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Posted By : Dipika Yedge
Assigned To : (All Members)
R125
Date & Time : 24-02-2023 01:23:PM
Dipika Yedge | Import option for Bank URL

Hi,

Require import option to bank URL
Posted By : Bhavana Pachpande
Assigned To : Dipika Yedge
R125
Date & Time : 27-02-2023 10:54:AM
Hello mam,

Will check and update here with our queries before any development starts.
Posted By : Bhavana Pachpande
Assigned To : Dipika Yedge
R125
Date & Time : 27-02-2023 12:07:PM
Hello mam,

As per discussion with Shimbi team below are our queries :

1) No. of excel records will be used during import by inputter ?
2) No. of user(inputter) will import excel records at a time ?
3) What will be the load on server during this import process, when will they import during same time as PAMAC ?
Posted By : Ganesh Sawant
Assigned To : Bhavana Pachpande
R125

Date & Time : 10-03-2023 11:59:AM
Hi Bhavana

1)No. of excel records will be used during import by inputter ?
  It will be normal which we have provide presently and max 200 records

2) No. of user(inputter) will import excel records at a time ?
6 to 7 users

3) What will be the load on server during this import process, when will they import during same time as PAMAC ?
Can't idea as it will be used by Bank
Posted By : Manas Dasgupta
Assigned To : Ganesh Sawant
R125
Date & Time : 20-03-2023 03:43:PM
Hello sir,

Please add this task to task list (**D217**) and set priority, so that we can proceed accordingly.
Posted By : Manas Dasgupta
Assigned To : Prasad Gawade
R125
Date & Time : 23-03-2023 11:37:AM
Hello Prasad,

Let me know when you are available to discuss this point to set development time.
Posted By : Prasad Gawade
Assigned To : Dipika Yedge
R125
Date & Time : 28-03-2023 12:04:PM
Will require 4 working days till demo server
Posted By : Prasad Gawade
Assigned To : Bhavana Pachpande
R125
Date & Time : 31-03-2023 04:24:PM
As discussed with Ramki sir, currently working on this task.
Posted By : Ramakrishnan V
Assigned To : Ganesh Sawant
R125
Date & Time : 31-03-2023 04:38:PM
Please go through the following and approve for prasad to go forward suitably:

The current practice of bank for Case entry is single – Each case is entered in the Case entry screen and then the same is verified by the user in Bank Verification screen and then sent to Authoriser.

The authoriser sees each case and then sends the same to PAMC team for further action.

Now the bank require a functionality where by they can upload the cases (as currently done by Pamac) and then bulk approval or reject and send to pamac.

In view of the fact that such a facility, if given to all bank users will create a very heavy overload on the system, the Bank has agreed that only 6-7 users would do this activity.

Based on the discussion with Ganesh and he with users/ops, the following approach has been contemplated.

·   Two new roles will be created – namely Import_inputter and import_Authoriser. Each of these inputters will be attached to one of the Import_authoriser.
o   Once a bulk import is done by the import inputter the same will move to the Import Authoriser connected with the inputter.
·   In the current screen of "Case Entry" additional field/button as given below would be added:
o   Sample download
o   Choose file – Browse
o   Import Button
o   Note that these would be visible only to the Import inputter and not other inputters. Similarly the NEXT button would not be visible to Import_inputter.
·   The import inputter can either download the sample template and fill the details or create an excel exactly same as the sample template.
·   Once he chooses his file from browse, and clicks on the Import button, the back end would verify
o   Whether the imported file is in the same format (headers) as the template provided – if yes – go forward else return message – not correct excel file.
o   Do other validations as required and all accepted cases will be saved in the database in tbl_cases with status – Sent to Authoriser. Any unaccepted records will be shown as an excel of invalid records.
o   Note: The imported records will not be visible in the Bank verification as it is assumed that the excel would be in the correct format and correct data. If it is to be again verified by the User in Bank verification, then the process of bulk may not be time saving.
·   All the cases uploaded above will be shown to the Authoriser. The authoriser will have the option either to check each or as many as he likes and then approve or reject in bulk by ticking the checkbox provided and giving his view in the field provided for "approved or reject".
o   In case of approved he can send to PAMAC and in reject cases the same will flow back to user (import inputter) in the Bank verification tab for doing the necessary.
·   All subsequent activities would be as they are.

Posted By : Ramakrishnan V
Assigned To : Ganesh Sawant
R125
Date & Time : 31-03-2023 04:40:PM
Technical approach given to Prasad:
1) Create two new roles - a) Import inputter b) Import authorizor
2) Create two users of both roles respectively for testing.
3) Changes in Case Entry page
4) Create three new fields
  a) "Choose file" input type. (for excel file).
  b) "Import" button instead of "Next".
5) On selecting Client, Product and Verification type, respective import template sample download will appear.
6) Fill necessary details in excel file and click import.
7) Validate excel file with existing excel template.
8) After successful import of excel file, case will be directly send to authorizor for approval (in current process case moves to bank verification and then to authorizor for approval).
9) If authorizor approves the case, case will be send to Pamac else if rejected back to bank verification menu of Import Inputter.

Posted By : Dipika Yedge
Assigned To : Ramakrishnan V
R125
Date & Time : 31-03-2023 04:51:PM
Query:

1) How inputter will get to know about his imported cases?
2) We have already designed bilk approval button for inputter & Authorizer to approve multiple cases at a time
3) What if inputter want's to change any data after importing

PS- If we shows all cases in Bank verification we don't need to create Import Authorizer roll
Posted By : Prasad Gawade
Assigned To : (All Members)
R125
Date & Time : 01-04-2023 10:57:AM
Revised process flow after discussion with Ramki sir,

1) Create two new roles - a) Import inputter b) Import authorizor
2) Create two users of both roles respectively for testing.
3) Changes in Case Entry page
4) Create three new fields
  a) "Choose file" input type. (for excel file).
  b) "Import" button instead of "Next".
5) On selecting Client, Product and Verification type, respective import template sample download will appear.
6) Fill necessary details in excel file and click import.
7) Validate excel file with existing excel template.
8) After successful import of excel file, case will be move to bank verification and then to authorizor for approval.
9) If authorizor approves the case, case will be send to Pamac else if rejected back to bank verification menu of Import Inputter.

Hello sir please confirm on above points mentioned.
Posted By : Dipika Yedge
Assigned To : Prasad Gawade
R125
Date & Time : 01-04-2023 11:03:AM
Hi Prasad,

No need to create Import authorizer roll as authorizer can view/approve cases through Bank verification menu
Posted By : Dipika Yedge
Assigned To : Prasad Gawade
R125
Date & Time : 01-04-2023 03:32:PM
Hi Prasad

As discussed with Ganesh Sir,

No need to make changes in Case Entry Menu

Make changes in Import menu as it is already available with us and we have to make below changes
1, Hide Zone, Center & Subcenter, Select Api Name , Case Type , Case For (By default FE),
2. uploaded cases will reflect in Bank Verification instead of Case Verification
3. Skip dedupe search
4. These cases will reflect only to concern import authorizer

Posted By : Prasad Gawade
Assigned To : Dipika Yedge
R125
Date & Time : 06-04-2023 01:49:PM

Hello maam,

With reference to your above points.

1) Will the import inputter has access right to add cases from Case entry(i.e single case add).

Note : New designations "import inputter" and "import authoriser" are added to bifurcate menu rights for bulk import or single import (i.e case entry).

Reply   Cancel