



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

---

## Discussions (PAMAC (Cloud Version))

---

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

**Posted By :** Rakhi Gaud

D77

**Date & Time :** 19-11-2015 07:07:PM

Summary Page

---

Admin side:

- 1) Added a module named as 'Summary page'.
  - 2) Considered Client only to design a summary page of pdf template of selected client.
- Note: Activity and Product not considered currently.

User Side:

Summary page will show in following conditions -

- 1) If all selected cases having same client name, reference no and applicant's name.  
(Note: We have removed merging of pdf according to parent case.)

- 2) If we have selected cases of 3 different verification types and there is a layout designed with pdf templates assigned to all selected verification types only then summary page will show.

Other points:

- 1) If there are multiple cases of same verification type then the value will show on next line.
- 2) Shows third table value like verification type, client, product etc.
- 3) It shows the value of only those fields which have been used in its PDF template design (PDF layout).

Uploaded and tested all above changes on demo site (pamac.urdemo.net)

**Posted By :** Navika Desai

D77

**Date & Time :** 20-11-2015 10:14:AM

The above changes tested ok on demo, please upload on live.

We may have further changes in this module.

**Posted By :** Navika Desai

D77

**Date & Time :** 20-11-2015 10:15:AM

this is same as D76

**Posted By :** Navika Desai

D77

**Date & Time :** 23-11-2015 12:38:PM

Further changes required in Summary Module as below, these have been discussed with Rakhi on call and skype:

Better explained with an example of a case of Navika Desai with 2 ITR, 1 Pancard and 2 RV case. Here the import file will have atleast 2 rows of entries (ITR+Pan card+RV, ITR+RV) with same applicant name, ref number and client name.

- Once all 5 VTs are closed and the case is reflected in send to client tray. After selecting the cases for export in send to client, the system will navigate to a new page where the report of all 5 VT will be seen and there would be 3-4 editable fields for overall case status, overall case comments.

- The button at the end will be 'Save & Export' and 'Cancel'. 'Save & Export' will save the edited comments and status in Summary report and export a pdf with 1st page summary and rest of the report as individual VT case reports. 'Cancel' will navigate back to send to client page.

- These overall comments and status values to automatically be updated in each 5 VT case under a specific field. That is each VT case to have a field for overall case status and comments.

Here we will have to add a condition as below:

In one import file if there are more than one rows for same reference number and applicant name then the case should not come to send to client unless all the individual VTs are closed.

This will have to be editable and selective for each Activity, Client, Product.

Existing logic in country master is: The case will not come in send to client unless all VT cases of one row (in import file) is closed.

Please let us know the timelines for this.

**Posted By :** Kailash Kumawat

D77

**Date & Time :** 27-11-2015 08:26:PM

1) please fix fields and there names because it will be fix in coding.

2) we give you some fix word like #overall case status# or #overall case comments# so they will be replaced in summary and each VT pdf.

3) these fix field value will store in database because we need it in future what PDF send to client

4) if same customer pdf you want to generate again then previous save record will show for fix field and user can change it and generate new PDF.

same fields will update, if you need history of changes then we need to save separate record each time.

do you need history of changes?

5) suppose user select 15 cases in which 1-3 cases are of same customer so summary page will show, 4-7 cases are of same customer so summary page will show, 8-15 are individual cases without summary so summary page will not show.

in this case user will see editable form for 4 fields 2 times.

and total 10 PDF will generate in zip folder.

please give your approval/feedback on above points.

**Posted By :** Kailash Kumawat

D77

**Date & Time :** 27-11-2015 08:37:PM


do you need editable field functionality in send to client or in export also

because case show "send to client" list once and i export always show after "send to client"?

currently only country wise condition is given so we need to do it for Activity, Client, Product.

so there will be many combinations.  
we need to create new module for it.  
it is compulsory to select all fields (Activity, Client, Product) if yes then sql query will be less and performance will be better , if no then we need to do recursive functionality like employee/client rate.  
please find test-cases for 1 client, if client will more combinations will be more.  
Is my analysis correct?  
there will be no duplication of Activity, Client and Product.

---

 test-cases.xls

↓ Download

**Posted By :** Navika Desai

D77

**Date & Time :** 01-12-2015 06:49:PM

- 1) and 2) Overall case status and overall case comments field is ok.
- 3) agreed
- 4) history of changes would not be required. The fields will be editable only once while send to client hence value will be input once and that will be stored in database
- 5) ok

Editable functionality in export is not required. Case should not be editable after doing send to client.

For understanding the activity, client, product part and test cases, will have a discussion with you tomorrow.

**Posted By :** Kailash Kumawat

D77

**Date & Time :** 15-12-2015 07:03:PM

[4:55:05 PM] shimbilabs(Kailash): in summary page all Vt have some section like

RV (with some static text)

3 fields

BV (with some static text)

3 fields

RT (with some static text)

3 fields

BT (with some static text)

3 fields

[4:55:40 PM] shimbilabs(Kailash): admin will create this in summary PDF

then what will show if user have only RV and BV?

[4:55:54 PM] Navika Desai: it will not take those fields,...

[4:56:08 PM] shimbilabs(Kailash): RT and BT static text will show and dynmic values will be blank

[4:56:17 PM] shimbilabs(Kailash): Is it correct?

[4:56:23 PM] Navika Desai: right

**Posted By :** Navika Desai

D77

**Date & Time :** 21-12-2015 10:05:AM

Hi,

All the mentioned and agreed changes have been done.

Only one point is pending in HTML design of summary page.

If the value is 'null' in all the cells of an entire row in the table, the row should be deleted from the html for that case. For example, for the below table if template 305 is not applicable for the case, then the cell value for the

entire row would be 'null', hence this row has to be deleted from the table. That is, in case of empty cells, the row has to be deleted from output pdf.

Details			Status
#333.co_applicants_name_if_any#			#333.case_result#
#336.co_applicants_name_if_any#			#336.case_result#
#378.co_applicants_name_if_any#	#378.1st_outcome#	#378.case_result#	#378.remarks#
#305.co_applicants_name_if_any#	#305.issuing_bank#	#305.case_result#	#305.remarks#

**Posted By :** Navika Desai

D77

**Date & Time :** 28-12-2015 10:14:AM

Please update on this, this is urgent from business.

Also, for multiple checks of the same verification type, the value should be in another row of the table with cell borders.

**Posted By :** Kailash Kumawat

D77

**Date & Time :** 28-12-2015 04:31:PM

it will take 2 days to develop and test on demo site.

**Posted By :** Kailash Kumawat

D77

**Date & Time :** 28-12-2015 06:25:PM

as you need separate rows to same verification case records.

It will take 3 days to complete both functionality.

**Posted By :** Navika Desai

D77

**Date & Time :** 29-12-2015 09:58:AM

Hi,

Point 69 will be closed today.

Please work on this from 30-Dec and complete till 1-Jan.

**Posted By :** Navika Desai

D77

**Date & Time :** 29-12-2015 10:03:AM

Also, we need to discuss on my remarks dated 1-Dec-15.

This will have to be implemented as well. We shall discuss and decide on the timelines accordingly.

**Posted By :** Kailash Kumawat

D77

**Date & Time :** 30-12-2015 12:22:PM

1-Jan company have holiday.

technically it is not possible to create TR(row) tag inside TD tag(column).

So it is not possible in current layout.

We need to create different layout for it like in DIV.

**Posted By :** Navika Desai

D77

**Date & Time :** 30-12-2015 01:24:PM

Holiday of 1-Jan was not shown on upcoming holidays on Myproject, hence assumed you would be working.

We will require a separate row for same check, or suggest a way around this.

**Posted By :** Navika Desai

D77

**Date & Time :** 31-12-2015 10:30:AM

Kailash,

Please have the 'null' value rows removal coding done today. The one posted by me on 21-Dec-15

**Posted By :** Navika Desai

D77

**Date & Time :** 31-12-2015 04:39:PM

Hi,

Please confirm if this is done.. i need to test and have it uploaded on live site. by today.

**Posted By :** Navika Desai

D77

**Date & Time :** 31-12-2015 05:27:PM

Hi,

I have tested on country demo.

If all the cells of the table are empty, then we still have a line visible. Report attached.

Please rectify this and upload on live site.



101869860\_123456\_Test case\_1018698590.pdf

↓ Download

**Posted By :** Rakhi Gaud

D77

**Date & Time :** 05-01-2016 02:03:PM

Hi,

Please check all changes uploaded on demo site.

There are points to be note down:

- 1) all dynamic case data must be in one tr to duplicate rows.
- 2) there will be no mixing of 2 vt data in one tr
- 3) there will be no single vt data in multiple rows.
- 4) Can not use single field multiple times.

Please verify and confirm.

**Posted By :** Navika Desai

D77

**Date & Time :** 05-01-2016 04:00:PM

Hi, as discussed with Rakhi and mentioned above,

- 1) One VT fields cannot be in multiple rows
- 2) One row cannot have multiple VT fields
- 3) One field of one VT cannot be used multiple times

this is tested ok, please upload on live.

However the point 64 will remain open as the 'Overall case status' & 'Overall case remarks' module (explained in my comment on 23-Nov-15) is pending to be implemented.

Further, we have clients wherein we require only the summary page without the individual reports in subsequent pages.

Please advise on the option and feasibility for this.

**Posted By : Rakhi Gaud**

D77

**Date & Time : 05-01-2016 07:29:PM**

Hi,

Tomorrow morning I will upload the changes on live site.

'Overall case status' & 'Overall case remarks' module

- It will take 3-4 days and will be applicable for single customer.

Further, we have clients wherein we require only the summary page without the individual reports in subsequent pages.

- Yes, it is feasible. For this we can provide an option in summary add page to show only summary page which will be checkbox field and options will be Yes. By default system will download report with individual reports. It will be applicable for both export and send to client module.

**Posted By : Rakhi Gaud**

D77

**Date & Time : 06-01-2016 11:05:AM**

Hi,

I have uploaded changes related to summary page on live site which was confirmed on demo site.

Please verify and confirm.

**Posted By : Navika Desai**

D77

**Date & Time : 09-01-2016 10:14:AM**

The changes that were tested ok on demo site, have been tested ok on live site too.

1) 'Overall case status' & 'Overall case remarks' module - will confirm on the priority and development date for this later

2) only the summary page without the individual reports - How much time will the development take for this?

**Posted By : Navika Desai**

D77

**Date & Time : 12-01-2016 05:29:PM**

Hi Rakhi,

As discussed on skype for summary page pdf design :

- client, activity, product to be considered

- the list of export pdf for summary design will be displayed on selection of client, activity, product as per the export pdf assignment. Example: Export pdf assignment is Axis Bank<CPV<CC, then the pdf will show in summary page on selecting all three - Client: Axis, Activity:CPV, Product: CC.

- activity and client will be mandatory for summary page. Product may not be applicable for all, hence it should be non-mandatory.

Please add if I have missed anything.

**Posted By : Rakhi Gaud**

D77

**Date & Time :** 12-01-2016 05:43:PM

ok.

And one more point for matching summary page for export at user side-

It will exact match all 3 parameters i.e. client,activity and product.

Example - if you have selected cases of client Axis Bank, activity CPV and product CC, then system will exact match all the given values with summary page. If there is a summary page designed for client Axis Bank, Activity CPV and product is blank, then system will not consider this summary page.

This change will take 2 working days. The closure date will be 14/01/2016

**Posted By :** Navika Desai

D77

**Date & Time :** 12-01-2016 06:06:PM

Hi Rakhi,

Tasks have already been assigned and decided for 13-Jan & 14-Jan, hence we can take this up 15-Jan onwards.

**Posted By :** Navika Desai

D77

**Date & Time :** 13-01-2016 06:31:PM

Please make the above mentioned change (mentioned on 12-Jan-16) on 15-Jan & 18-Jan-16.

Hence closure date would be 18-Jan-16 on demo site

**Posted By :** Navika Desai

D77

**Date & Time :** 22-01-2016 12:13:PM

hi,

what is the closure date for Summary page changes?

2) only the summary page without the individual reports - How much time will the development take for this?

**Posted By :** Rakhi Gaud

D77

**Date & Time :** 27-01-2016 07:30:PM

Hi Navika,

Changes related to activity and product have been uploaded on demo site.

Please verify and confirm it.

**Posted By :** Navika Desai

D77

**Date & Time :** 28-01-2016 11:56:AM

Changes related to activity and product have been tested ok on India country demo. Please upload the changes on live site, confirm with me once making changes regarding this on live site, As I need to consult with operations team for this.

Pending in Summary page is:

1) 'Overall case status' & 'Overall case remarks' module - will confirm on the priority and development date for this later

2) only the summary page without the individual reports - as discussed yesterday, this will be done today on demo site

**Posted By :** Rakhi Gaud

D77

**Date & Time :** 28-01-2016 02:43:PM

Hi Navika,

I have uploaded changes related to activity and product on live site.

Please verify.

**Posted By :** Rakhi Gaud

D77

**Date & Time :** 28-01-2016 06:45:PM

Hi Navika,

2) only the summary page without the individual reports

- Uploaded changes related to this point on demo site.

There is an option(checkbox) given in summary add/edit page(at admin side).

If the given option is selected then pdf report will show summary page only without any individual reports.

Please verify it.

**Posted By :** Navika Desai

D77

**Date & Time :** 29-01-2016 07:52:PM

2) only the summary page without the individual reports

tested ok on country demo site, please upload on live site

**Posted By :** Navika Desai

D77

**Date & Time :** 02-02-2016 10:00:AM

Please update the status.

Summary page was a total of 5-6 days task and it is still pending.

Please share the closure date.

Kailash - For our discussion on summary page, the case status and remarks field should be kept editable to the user while preparing summary. Rest field should be visible but non-editable.

**Posted By :** Rakhi Gaud

D77

**Date & Time :** 02-02-2016 03:48:PM

1) 'Overall case status' & 'Overall case remarks' module -

Doing this change as given below:

1. If multiple applicants cases selected and there is option selected for overall status and overall remarks for that summary page then it will show error message and no report will get downloaded.

2. If single applicants cases are selected and there is an option selected for overall status and overall remarks for that summary page then it will show 2 textboxes to input overall status and remarks in next tab, below these 2 textboxes there will be pdf in HTML form in same page.

After clicking on save button, reports will get downloaded and the given values will get saved into the database.

3. If multiple applicants cases selected and there is an option for overall status and overall remarks which is not selected for any summary page then report will get downloaded.

**Posted By :** Navika Desai

D77

**Date & Time :** 02-02-2016 04:26:PM

1. Error should display the message that please select only one applicant.

2. The case status and remarks for individual verification should also be editable here.



3. ok

**Posted By :** Rakhi Gaud

D77

**Date & Time :** 03-02-2016 11:37:AM

Hi Navika,

As per our discussion on skype case\_result, remarks, Supervisor\_remarks these three fields also be editable for individual reports.

And at the time of send to client if user save one of the field as blank and there is already value available then it will update it as blank.

**Posted By :** Navika Desai

D77

**Date & Time :** 03-02-2016 12:23:PM

yes.

**Posted By :** Rakhi Gaud

D77

**Date & Time :** 05-02-2016 01:13:PM

Hi Navika,

1) 'Overall case status' & 'Overall case remarks' module -

a. As per discussion(on skype) Overall case status will be drop down wth options - Positive, Negative, Fraud, Refer and Overall remarks will be textarea.

a. The changes related to these fields 'Overall case status' & 'Overall case remarks' only have been completed and uploaded on demo site.

b. As per our discussion on skype, the point 'editable for individual reports' we will do this change in next week. Now we are doing change of 'field validation in import module'.

Please verify and confirm.

Note: Above changes not tested in browser IE(internet explorer).

**Posted By :** Navika Desai

D77

**Date & Time :** 06-02-2016 06:49:PM

Hi,

What is the field name for the overall case status and overall case remarks? this is required to be added in summary page design.

**Posted By :** Rakhi Gaud

D77

**Date & Time :** 08-02-2016 10:08:AM

#overall\_status# - for overall status

#overall\_comments# - for overall remarks

**Posted By :** Navika Desai


D77

**Date & Time :** 08-02-2016 10:43:AM

Field values for 'Summary' VT are coming Null on summary page. PFA

Overall status and overall comments are coming ok in web page and export pdf. Please make these 2 fields mandatory if not done already.

Error also reflected on selecting more than one applicant.

 1019050390.pdf[Download](#)**Posted By :** Navika Desai

D77

**Date & Time :** 09-02-2016 06:21:PM

Please update

**Posted By :** Rakhi Gaud

D77

**Date & Time :** 09-02-2016 07:20:PM

Ok.

I will check it.

**Posted By :** Navika Desai

D77

**Date & Time :** 10-02-2016 11:57:AM

2) only the summary page without the individual reports tested ok on country demo site, please upload on live site mentioned on 29-Jan-16 is not done.

**Posted By :** Rakhi Gaud

D77

**Date & Time :** 11-02-2016 12:59:PM

Hi,

Uploaded changes related to point 2) only the summary page without the individual reports. on live site.

Please verify.

**Posted By :** Navika Desai

D77

**Date & Time :** 11-02-2016 03:10:PM

2) only the summary page without the individual reports. tested ok on live.

Please rectify the error posted on 8-Feb-16

**Posted By :** Navika Desai

D77

**Date & Time :** 13-02-2016 12:09:PM

1. Error for - Fields for VT 'Summary' - has been rectified, tested ok on demo

2. Overall status & overall comments are now mandatory

3. For overall summary and status page after send to client, along with a save options, there needs to be a cancel option. The function would be - the page will navigate back to send to client menu and the report will not be downloaded

4. When we select only summary (without individual reports) in summary page, then the overall status page shows only the summary report, it needs to show individual reports also as the overall comments and status will be updated on the basis of observing these individual reports

**Posted By :** Rakhi Gaud

D77

**Date & Time :** 13-02-2016 06:03:PM

Hi,

The point mentioned on 29-Jan-16 is done.

Please check and verify it by adding new cases on demo site.

**Posted By :** Navika Desai

D77

**Date & Time :** 15-02-2016 10:25:AM

Hi,

The comments mentioned on 13-Feb-16 by myself are pending.

**Posted By :** Rakhi Gaud

D77

**Date & Time :** 15-02-2016 07:39:PM

Hi,

Completed and uploaded the changes mentioned on 13-Feb-16.

Please verify and confirm it on demo site.

**Posted By :** Navika Desai

D77

**Date & Time :** 16-02-2016 01:56:PM

3. For overall summary and status page after send to client, along with a save options, there needs to be a cancel option. The function would be - the page will navigate back to send to client menu and the report will not be downloaded

4. When we select only summary (without individual reports) in summary page, then the overall status page shows only the summary report, it needs to show individual reports also as the overall comments and status will be updated on the basis of observing these individual reports

the above changes have been tested ok on demo site.

Please do not upload on live as of now.

I will inform when to upload.

**Posted By :** Navika Desai

D77

**Date & Time :** 01-04-2016 05:37:PM

Uploading this on live will have to be kept pending till operations team confirm.

**Posted By :** Navika Desai

D77

**Date & Time :** 04-04-2016 10:28:AM

Operations team has confirmed on this, please let us know when will the change be uploaded on live; as there are few back end changes that will have to be made for this and the operations team will have to be informed accordingly.

**Posted By :** Super Admin

D77

**Date & Time :** 04-04-2016 11:55:AM

Kailash Or Rakhi can we close this?

**Posted By :** Rakhi Gaud

D77

**Date & Time :** 13-04-2016 08:44:AM

I have to prepare changes in all coding files first because it's big change.

I will upload it on 19-04-2016 (Tuesday) morning.

**Posted By :** Super Admin

D77

**Date & Time :** 13-04-2016 04:49:PM

was it bug, change or operation support ?

**Posted By :** Rakhi Gaud

D77

**Date & Time :** 13-04-2016 04:50:PM

it is a change.

**Posted By :** Navika Desai

D77

**Date & Time :** 13-04-2016 06:41:PM

I will check with operations team and confirm.

Will there be any effect on existing pending or closed cases?

**Posted By :** Rakhi Gaud

D77

**Date & Time :** 14-04-2016 12:21:PM

Need to check the effect on existing cases.

**Posted By :** Navika Desai

D77

**Date & Time :** 14-04-2016 02:46:PM

please check and let us know

**Posted By :** Rakhi Gaud

D77

**Date & Time :** 14-04-2016 04:08:PM

No, there will not be any effect on existing cases.

**Posted By :** Navika Desai

D77

**Date & Time :** 16-04-2016 06:30:PM

Please go ahead for changes on 19-Apr morning on live site, i have informed the operations team.

let me know once this is done.

**Posted By :** Rakhi Gaud

D77

**Date & Time :** 19-04-2016 09:16:AM

Hi Navika,

Uploaded the changes on live site.

But unable to test it.

I have checked only export module.

Please verify and confirm.

**Posted By :** Navika Desai

D77

**Date & Time :** 19-04-2016 09:54:AM

Please add test cases on live site and confirm from your end.

**Posted By :** Rakhi Gaud

D77

**Date & Time :** 19-04-2016 03:34:PM

I have test the above changes by adding 10 test cases of client 'test' on live site.

Should I remove it directly from database?

**Posted By :** Navika Desai

D77

**Date & Time :** 19-04-2016 03:47:PM

Please confirm on the testing done.

Yes, please deleted those.

**Posted By :** Rakhi Gaud

D77

**Date & Time :** 19-04-2016 04:42:PM

Removed(deleted from database) test cases.

Done with the testing.

**Posted By :** Navika Desai

D77

**Date & Time :** 19-04-2016 06:15:PM

Tested ok.

**Posted By :** Super Admin

D77

**Date & Time :** 23-04-2016 03:46:PM

What is next? If over please close

**Posted By :** Navika Desai

D77

**Date & Time :** 23-04-2016 06:27:PM

Initiated by Rakhi, hence i cant close.

**Posted By :** Rakhi Gaud

D77

**Date & Time :** 25-04-2016 09:02:AM

Question is closed.