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Requirements (PAMAC (Cloud Version))

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Posted By : Navika Desai
R16
Date & Time : 02-06-2017 03:44:PM
Auto refresh menu for client

A new module required which would automatically refresh every minute (need to check if the frequency can be made dynamic)
1) Pending cases list fields with fields and heading editable as per client, activity, product combincation. With last modified case on the top. Case to move out of this list once send to client is done.
2) Pdf preview option for each case in this menu
3) A drop down for selecting the report (name) to be exported and a date range. The reports and date range shown here will be designed dynamically (similar to MIS module - report creation).
4) Field identifier for identifying the cases that belong to a specific client POC and only those cases should be seen to that client POC. For Ex: A client Axis Bank, client POCs are Navika Desai, Rakhi Gaud and Sandeep Ghuge. So the ops users will select the identifier field value according to the client POC (Navika, Sandeep or Rakhi). When Rakhi logs in to RES, only Rakhi's cases to be seen to Rakhi. This will be applicable for all menus, modules, reports. Suggestion - The identifier can be the email id of client which will be their user ID in RES.
Posted By : Navika Desai
R16
Date & Time : 02-06-2017 04:28:PM
As discussed, auto refresh can be every 15 minutes with a manual refresh button.
Posted By : Navika Desai
R16
Date & Time : 05-06-2017 04:56:PM
Kailash - as discussed, please update.

Need to give timelines to ops.
Posted By : Bhavana Pachpande
R16
Date & Time : 06-06-2017 09:33:AM

As per discussion with Sir Kailash following are the queries :

1) Pending cases list fields with fields and heading editable as per client, activity, product combination. With last modified case on the top. Case to move out of this list once send to client is done.

Reply :
Will this be managed from Activity template for creating the list.
Rest conditions can be applied like :
With last modified case on the top. Case to move out of this list once send to client is done.

2) Pdf preview option for each case in this menu
Reply : OK

3) A drop down for selecting the report (name) to be exported and a date range. The reports and date range shown here will be designed dynamically (similar to MIS module - report creation).

Reply : Will this Report be created using Report Creation module. Or separate module is required.

4) Field identifier for identifying the cases that belong to a specific client POC and only those cases should be seen to that client POC.

For Ex: A client Axis Bank, client POCs are Navika Desai, Rakhi Gaud and Sandeep Ghuge. So the ops users will select the identifier field value according to the client POC (Navika, Sandeep or Rakhi).

When Rakhi logs in to RES, only Rakhi's cases to be seen to Rakhi.
This will be applicable for all menus, modules, reports.

Suggestion - The identifier can be the email id of client which will be their user ID in RES.

Reply :
Q1) : How to check which field will be used for identifier here for client and case?

Q2) Where will the ops admin select the identifier field value ?

Posted By : Navika Desai
R16
Date & Time : 06-06-2017 10:21:AM
1) Cannot be managed from activity template, it will vary with client, activity, product combination. It cannot depend on activity.
Rest conditions are okay
3) Reports added in report creation menu is okay, but how will the reports be assigned to a specific client, activity, product? Plus we also need to define the date field with which the data will be searched.
4) Q1) New field can be added so that values do not overlap
Q2) they will import/add with the case

Refer the skype discussion for further queries.
Posted By : Bhavana Pachpande
R16

Date & Time : 06-06-2017 03:05:PM
I have uploaded the doc file containing flow and comments. Please check.
These changes will take 9 days.

Client list page.docx
↧ Download
Posted By : Navika Desai
R16
Date & Time : 06-06-2017 03:10:PM
Reply to one comment N11 is missing, rest of your comments are okay.
Can you start working on this from tomorrow?
Posted By : Bhavana Pachpande
R16
Date & Time : 06-06-2017 03:52:PM
comment N11 : Okay. If the field is select and the options are not added, will it show any value?

Reply : No

Yes. We will start as per schedule from tomorrow.

Posted By : Navika Desai
R16
Date & Time : 06-06-2017 03:52:PM
Great thanks.
Posted By : Navika Desai
R16
Date & Time : 16-06-2017 09:38:AM
What is the update? By when will this be done?
Posted By : Bhavana Pachpande
R16
Date & Time : 16-06-2017 12:16:PM
Reports module and Showing cases to Employee (Client designation) in all other modules according to identifier field is done.

Import case using identifier field is also completed.

Currently working on new module for Client template design. We shall update on demo server on thursday after all changes and testing done in local server.
Posted By : Bhavana Pachpande
R16
Date & Time : 16-06-2017 03:57:PM
As per skype discussion updated doc is attached for flow.

Client list page_updated.docx
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Posted By : Navika Desai
R16
Date & Time : 22-06-2017 12:01:PM
Status?
Posted By : Manas Dasgupta
R16
Date & Time : 22-06-2017 12:29:PM

As per skype discussion updated doc is attached for flow for new changes.

Client list page_updated-22-06-17.docx
↧ Download

Posted By : Navika Desai
R16
Date & Time : 22-06-2017 01:19:PM
When will this be completed? Timeline was today.
Posted By : Bhavana Pachpande
R16
Date & Time : 22-06-2017 01:50:PM
Requirement with Changes will be uploaded by Wednesday.
Posted By : Navika Desai
R16
Date & Time : 22-06-2017 02:17:PM
why the delay?

How many days in total is the work scheduled?
Posted By : Bhavana Pachpande
R16
Date & Time : 22-06-2017 05:42:PM
9 days. Due to solving of bug for TAT, add multiple identifier for import and validations and other points in between like Import dubai case details : R20,Check summary page issue, Fe/tele seperation process : checkbox not showing in case verification tray of Supervisor for forcefully assigning case to FE,calendar is not seen in the fieldSent development was delayed.
Posted By : Manas Dasgupta
R16
Date & Time : 28-06-2017 04:01:PM
Changes are updated in demo server, please check.

Added new field in case table using field master as :
identifier_field > Client Poc(label)

Admin Side New menu added :

1) Templates > Client Template : To create client List page for Employee
(design: client)

2) Template > Report Creation : New multiselect dropdown added : Client Poc
Test Report added as : Client Poc Report 1 and Client Poc Report 2

3) For import , add Client Poc field in existing template (Template design) and
give order for Client Poc in Import Design for that design template.

Identifier field can be multiple separated by +, and must match employee code in employee table.

User Side New menu added : (Employee design:client) login

1) Client > Case List.

2) Rest menus if assigned will show cases according to import : identifier field.

Test data used :

Client Login :

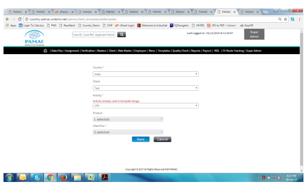
Username : manas111
Password : admin@123

and

Username : bhavana222
Password : admin@123

Template Imported : Axis > CC > Axis Bank CC RV_BV_RT_BT.
Template attached.

Template_Aouto Refresh.xls
↧ Download
Posted By : Navika Desai
R16
Date & Time : 29-06-2017 06:42:PM
1) multiple activity error
2) cases of other client poc are seen in the client poc report
3) List is not refreshing on button press



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poc_report.xls
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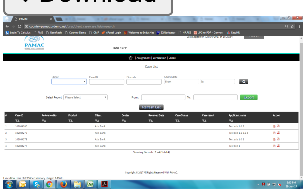

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Posted By : Manas Dasgupta
R16
Date & Time : 30-06-2017 03:11:PM
1) multiple activity error :

Reply :Validation was applied to make unique entries for Activity, inorder to avoid confusion which template to be shown to employee, if same activity was added twice.

New change done : Activity and Employee added for that activity while creating the template must be unique. (Activity+Employee must be unique.)

2) cases of other client poc are seen in the client poc report.
Reply : Issue resolved.

3) List is not refreshing on button press.
Reply : It is working.

Changes were uploaded in demo site.
Posted By : Navika Desai
R16
Date & Time : 01-07-2017 05:26:PM
The above mentioned were a part of initial requirement and discussed already, then why was it developed incorrectly? Which took another day of both the engineers to resolve.

Why are both engineers working on the same task?

Please share total working days taken for this?
Posted By : Bhavana Pachpande
R16
Date & Time : 03-07-2017 08:59:AM
For point 1) Activity + Employee must be unique was not discussed, only activity to be unique was done, so that we could avoid confusion which which template to be shown to employee, if same activity was added twice.

For Point 2, there was issue in where condition.
Total 9 working days till demo site. One engineer for testing and other for development, otherwise it would have taken more time than 9 days, because there were lots of changes for hiding cases in different modules for Employee type (Client). Plus as per new discussion for Activity to be unique for each Template creation also extended the time.

Posted By : Navika Desai
R16
Date & Time : 03-07-2017 01:43:PM
You can refer the skype chat where this was discussed.
Point 2, was discussed, then why the issue?

The requirement was discussed on phone twice, and one skype many times. You please refer the skype discussions. Refer to my 6th Jun post, skype chat of 22nd June.
Posted By : Bhavana Pachpande
R16
Date & Time : 03-07-2017 02:56:PM
Point 2 was according to the report creation query, was shown, but not according to the identifier field which is now hardcoded for where condition.
This could be done using query also (Report Creation) by adding the where condition to show for selected clients, if wanted while creating the report.
Posted By : Navika Desai
R16
Date & Time : 03-07-2017 03:40:PM
Last modified case is not shown on top of the list.
Posted By : Navika Desai
R16
Date & Time : 03-07-2017 03:48:PM

Rest is tested okay.
Posted By : Manas Dasgupta
R16
Date & Time : 05-07-2017 06:02:PM
I have updated changes on demo site to show cases with last modified date on top of the list. Please check.
Posted By : Navika Desai
R16
Date & Time : 05-07-2017 06:17:PM
Last modified shown on top.

Schedule upload on live and let me know. Shall confirm.

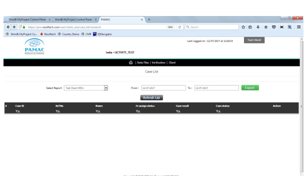
Is it dependent on any other module? Can it be uploaded on live?
Posted By : Manas Dasgupta
R16
Date & Time : 06-07-2017 08:22:AM
No, just updates in existing code of some modules like Report Creation, Import, Assignment and Case Verification.
I shall make changes in mirror copy of live in country demo and then upload on live on monday 10/07/2017.
Posted By : Navika Desai
R16
Date & Time : 07-07-2017 10:45:AM
Okay
Posted By : Manas Dasgupta
R16
Date & Time : 10-07-2017 05:43:PM
Changes are Uploaded in Live server. Please check.
Posted By : Navika Desai
R16
Date & Time : 12-07-2017 12:47:PM
Error faced for one MIS. Details below screen shot attached.

Client POC login:
Testclient
pamac@123

Report name - Test Client MIS1

Assigned to POC - Testclient

Other MIS for the same client POC are coming okay.
Rest changes also tested okay.



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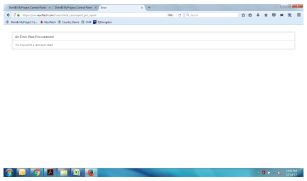

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Posted By : Manas Dasgupta
R16
Date & Time : 12-07-2017 03:19:PM
I have checked, it is the issue of Report id (Test Client MIS 1), report id 58 has been used for Vendor Payout Report in demo server, but it is not present in Live server, as such there was error in query (no vendor related field found) due to which Report couldn't be exported to excel.

I have checked and removed this id from checking.

Posted By : Navika Desai
R16
Date & Time : 12-07-2017 03:35:PM
Resolved.
Closed

Posted By : Navika Desai
R16
Date & Time : 12-07-2017 03:36:PM
Requirement is closed.

Reply Cancel