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Posted By : Bhavana Pachpande
D117
Date & Time : 25-07-2016 02:42:PM
Point 49 (Alert on importing any case : ref_no, applicant_name & Client_id)

Queries :

1)When importing any case, Alert message will be shown in next page above table, if same ref_no, applicant_name & Client_id already present in the system. Is it Ok

2) Is it required for all the three fields ref_no, applicant_name & Client_id to be present together in the template for which alert message will be shown, or if any one of them is present in the template alert message will be shown.

3) In Add new case where will alert be shown.

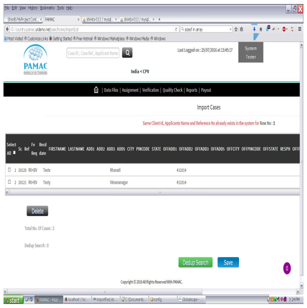
4) As per discussion in task list sheet : New case - will have visible only the fields that are there in import design and only validations for those will be applicable to manually add a new case in the system. : This is OK

5) As per discussion : New sub menu - Case entry - will have the entire form as applicable to the user basis the designation and all the validations of the entire form will be applicable. :
Why do we need this ? Since we can see whole form in edit case also.

Posted By : Bhavana Pachpande
D117
Date & Time : 26-07-2016 04:00:PM
Showing alert for import case done and updated in demo server.

If same Client id , Applicant's Name and Reference No are present already in the system, then alert message will be shown while importing case, above the table in 2nd page as shown in the attachment below.

Please check.



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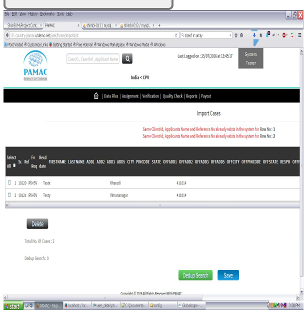

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Posted By : Navika Desai
D117
Date & Time : 27-07-2016 12:09:PM
1)When importing any case, Alert message will be shown in next page above table, if same ref_no, applicant_name & Client_id already present in the system. Is it Ok
Seems ok, but need to see the layout to confirm

2) Is it required for all the three fields ref_no, applicant_name & Client_id to be present together in the template for which alert message will be shown, or if any one of them is present in the template alert message will be shown.
all the 3 fields have to be same for the alert

3) In Add new case where will alert be shown.
after clicking save button, a pop up or new window to show the details and then confirm save

4) As per discussion in task list sheet : New case - will have visible only the fields that are there in import design and only validations for those will be applicable to manually add a new case in the system. : This is OK
This is a different point, why merged with this point?

5) As per discussion : New sub menu - Case entry - will have the entire form as applicable to the user basis the designation and all the validations of the entire form will be applicable. :
Why do we need this ? Since we can see whole form in edit case also.
This is a different point, why merged with this point?
Case edit will be after we import the case, this is if we want to add a new case with all the data.
This should have been asked earlier while discussion in April, why now?

two different alerts for? Two type of combinations or something else.
Please share the process flow and changes made.

Posted By : Bhavana Pachpande
D117

Date & Time : 27-07-2016 12:21:PM
Add new case under Verification menu :

1) Will have 6 dropdowns
Zone, Center , Subcenter, Client, Product , Template Name

2) Dependable dropdown Template Name (similar in import case).

3) Dependable Verification type checkboxes (same as current Add new case under Verification menu)

Validations :
4) Client , Template Name and Verification type are required.

5) When next button will be clicked a new page containing Import Template Label and input box for user to enter value will be provided. It won't check the field type in template.
Validations will work as per import module.

It will be same functionality as in import case using excel shit. Only here multiple data cannot be entered as in import case.

6) On clicking save, case will be added to the system

Query :
a) Should there be any validation if alert is shown that cases cannot be added.

There will be a new sub-menu as Case Entry : which will be similar to current Add New Case

Posted By : Navika Desai
D117
Date & Time : 27-07-2016 01:10:PM
1) users will not understand anything from template name, template name not required.
I suppose we have validation for no duplicate template assignment in system.
2) Will hence not be applicable
3) will be as per selection
4) template name not applicable
5) Layout for import template label will be how? same as order sequence in template? It will have to check field type and other validations as applicable in the template for those fields only.
Validations will work as per import module meaning? what kind of validations do we have in import module and where do we edit these validations?
6) Dedupe option?

a) what kind of validation? and why can the cases not be added?

What if i want to add 2 checks of the same Verification type?

Posted By : Bhavana Pachpande
D117
Date & Time : 27-07-2016 04:00:PM
As per discussed in skype :

Flow :

a)There will be a new sub-menu as Case Entry : which will be similar to current Add New Case

b) Sub-menu : Add New case will have :

1) Will have 6 dropdowns
Zone, Center , Subcenter, Client, Product , Template Name

2) Dependable dropdown Template Name (similar in import case).
(This will be required)

3) Dependable Verification type checkboxes (from Selected Template Name) i.e vt used in Template. (This will be required)

4) When next button will be clicked a new page containing fields , types and validations will be shown as mentioned in its global template.

5) If now there are two VT , two pages will open.

6) When all details are filled last page will show alert with confirm save button

7) On save case will be added to the system

Posted By : Navika Desai
D117
Date & Time : 27-07-2016 04:23:PM
alert of same ref_no , Applicants_name , Client_name will be check and error shown after last VT has been added and saved?

pending response for - What if i want to add 2 checks of the same Verification type?
Posted By : Bhavana Pachpande
D117
Date & Time : 27-07-2016 04:47:PM
pending response for - What if i want to add 2 checks of the same Verification type?
1) Won't be possible as discussed with Sir Kailash.

alert of same ref_no , Applicants_name , Client_name will be check and error shown after last VT has been added and saved?
2) Alert message will be shown at the end when final save will be done. There will be checkbox provided near each alert message if user want's to save those cases or not. If nothing is selected only cases without alert will be saved.
Posted By : Navika Desai
D117
Date & Time : 27-07-2016 05:05:PM
2) Share layout for confirmation
Posted By : Navika Desai
D117
Date & Time : 28-07-2016 04:30:PM
Also share the reason for
1) Won't be possible as discussed with Sir Kailash.
Posted By : Navika Desai

D117

Date & Time : 01-08-2016 01:58:PM

Missed mentioning, points other than those mentioned in my post on 27 & 28 Jul are ok.

Is it uploaded on demo? Can i do the testing?

Posted By : Bhavana Pachpande

D117

Date & Time : 01-08-2016 02:43:PM

No it's not yet uploaded in demo server. Development is still going on.

pending response for - What if i want to add 2 checks of the same Verification type?

1) Won't be possible as discussed with Sir Kailash.

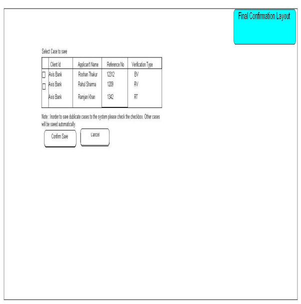
How is it possible . How can we provide multiple options for same VT.

Screenshot for

2) Share layout for confirmation

3) Add New case

are available in the attachment below.



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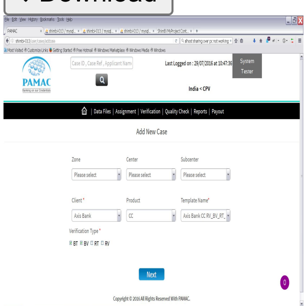

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Posted By : Navika Desai

D117

Date & Time : 01-08-2016 03:36:PM

You are the developers and you have to give the response to the question - How can we provide multiple options for same VT.

Hope we have different sub menu for Add new case and Case entry. Please confirm

Screen shot:

2) ok, rectify the spelling mistakes & provide check all option. And just for documentation, alert will have the

cases that have same ref_no, client_name & applicants_name (which were uploaded in the system earlier)
3) Add new case is ok

Similar page for case entry?
Posted By : Super Admin
D117
Date & Time : 02-08-2016 03:24:AM
lets stick to only queries... lets not get into personal
We developer ask question, better simple clarify queries. i will help build strong system.
Your understand your business, better we understand coding.

ShimBi Team, conclude
Posted By : Bhavana Pachpande
D117
Date & Time : 04-08-2016 12:23:PM
Flow is updated in the Attachment below. Please check.

Hope we have different sub menu for Add new case and Case entry. Please confirm.
Reply: Yes we have different sub-menus.

2) ok, rectify the spelling mistakes & provide check all option. And just for documentation, alert will have the cases that have same ref_no, client_name & applicants_name (which were uploaded in the system earlier)

Reply : Spelling mistakes are rectified and Check all option is provided. Yes alert will be for he cases that have same ref_no, client_name & applicants_name(which were uploaded in the system earlier). If no such alert is found case will proceed and save normally. Confirm Save page won't be shown.

Changes are made and uploaded in demo server please check.

Point49.txt
↧ Download
Posted By : Navika Desai
D117
Date & Time : 04-08-2016 03:27:PM
I. Import module tested ok as mentioned in flow
II. New Case
No template seen in template dropdown. First it shows and then it does not. Attached screen shot, please check.
Hence unable to check this flow further

III. Case Entry
case 102083419 was manually added using case entry, with client name, ref & applicant name same as existing case 102083416, but did not show as already available. Similarly for case 102083420 same as 102083417, did not show. Please check

---

D117 - P49-Same ref,name,client.docx
↧ Download
Posted By : Bhavana Pachpande
D117
Date & Time : 04-08-2016 04:16:PM
II. New Case
No template seen in template dropdown. First it shows and then it does not. Attached screen shot, please check.

Hence unable to check this flow further

Reply : Done Please check. Product id was going null when querying database. Issue resolve and updated. Please check

III. Case Entry :
case 102083419 was manually added using case entry, with client name, ref & applicant name same as existing case 102083416, but did not show as already available. Similarly for case 102083420 same as 102083417, did not show. Please check

Reply :
It has no checking for duplicate : alert : Client Name, Applicant's name and Ref No. It has been already mentioned in the flow as Case Entry will be as Old Add New Case. That is similar to add new case that was going on. We have just changed the menu name.

Posted By : Navika Desai
D117
Date & Time : 04-08-2016 04:56:PM
II. New case tested ok as mentioned in flow

III. Case Entry
The module was to remain same, but the check of same ref no, client name and applicant name was to be added as a functionality. I presumed wrong.
Can this be done now in this module? How much time will it take to add the functionality in case entry module as well?
Posted By : Bhavana Pachpande
D117
Date & Time : 05-08-2016 10:40:AM
Yes it can be done in Case Entry also. It will take 2 days.

Here , when all cases are added at the end similar confirm save page will appear with checkbox to continue saving. Is it ok.
Posted By : Navika Desai
D117
Date & Time : 05-08-2016 11:27:AM
Yes this is ok.
Please get this done for the completing the module in entirety.

Let me know the schedule for this.

Discuss with Kailash once with regards to when this is to be done as per the schedule being followe.
Posted By : Bhavana Pachpande
D117
Date & Time : 05-08-2016 05:02:PM
According to discussion time alloted was 4 days for Point 49, which will be now extended to 6 days. (additional 2 days without testing)

Updating Timeline in task list , will consume half working day. That is 2 days plus 1 day (half day for uploading in demo server and testing and half day for updating tasklist timeline).
Posted By : Navika Desai
D117
Date & Time : 08-08-2016 10:40:AM
Updating timeline in task list takes half day? Isnt that too much?

Posted By : Bhavana Pachpande
D117
Date & Time : 08-08-2016 10:59:AM
Yes, because sheet needs to be updated till 2017 also for both engineer, with all holidays, saturday and sunday deducted in between. This will require checking every month date wise.
Posted By : Navika Desai
D117
Date & Time : 08-08-2016 11:02:AM
Please do not waste time in that. As this would keep happening and we canno revise the task list every time. We shall consider 4 days acceptable delay in schedule of task list. 2 earlier days and 2 for this one.

Hope this is agreeable and productive.
Posted By : Bhavana Pachpande
D117
Date & Time : 09-08-2016 03:00:PM
Updated flow in available in the attachment below :

Changes are updated in demo server too, Please check.

Update_flow_point_49.txt
↧ Download
Posted By : Navika Desai
D117
Date & Time : 10-08-2016 03:37:PM
III. Case Entry
Single VT tested ok

In case of multiple VT please see the below process followed:
III) Case Entry:
Selected Client (capri Global), Product (Retail loan), VT (RV&BV)
Filled one form BV and then clicked save, it showed the error page of same client id, ref no & applicant name. Then clicked on Confirm Save and it added one case in the system for BV - 102083442.

No form opened for RV here

II) New case worked properly for multiple VT
I) Import module worked properly for multiple VT
Posted By : Bhavana Pachpande
D117
Date & Time : 10-08-2016 05:13:PM
III) Case Entry:
Selected Client (capri Global), Product (Retail loan), VT (RV&BV)
Filled one form BV and then clicked save, it showed the error page of same client id, ref no & applicant name. Then clicked on Confirm Save and it added one case in the system for BV - 102083442.

No form opened for RV here

Reply:
Issue solved, changes were updated in demo server please check.
Posted By : Navika Desai
D117
Date & Time : 10-08-2016 05:21:PM
check the attached screen shot, 3 ref numbers shown and only one applicant name

Please resolve.

D117.docx

↧ Download

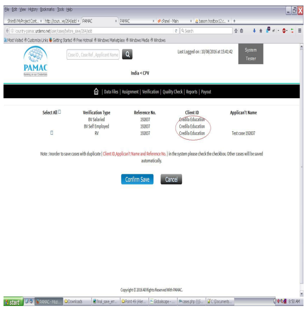
Posted By : Bhavana Pachpande

D117

Date & Time : 11-08-2016 09:13:AM

Client name are now shown in final saving ,
Applicant's name was entered only for VT : RV other VT doesn't have any Applicant's name field entered so no applican't name shown in final save. Also no duplicate alert for : BV Self Employed and BV Salaried

Client Name not shown in final save Issue resolved. Below is the attachment showing final save for :
client : Credila Education,
Product: Retail Loan ;
VT : BV Self Employed and BV Salaried and RV



↧ Download

Posted By : Navika Desai

D117

Date & Time : 11-08-2016 11:10:AM

So how will the user identify that the duplicate is for which of the three VTs that the user just added?

Posted By : Bhavana Pachpande

D117

Date & Time : 11-08-2016 11:22:AM

Checkbox appears before duplicate cases.

A note is also given while saving cases : in the confirm save page.

Note : Inorder to save cases with duplicate (Client I D,Applican't Name and Reference No.) in the system please check the checkbox. Other cases will be saved automatically.

Do you need extra information to be added with this note. If any please suggest.

Posted By : Navika Desai

D117

Date & Time : 11-08-2016 11:44:AM

So as i understand if I have added 7 cases in total... of which 3 cases are duplicate, then only those 3 cases will have the checkbox. Also, just for clarity if i do not select the check box for all the 3 modules (Import, new case, case entry), the the remaining cases that are not duplicate will be saved automatically.
If so, then this is ok.

No more information required in the note.

Point 49 confirmed okay on demo, can be uploaded on live this Wednesday, Thursday.

Posted By : Bhavana Pachpande

D117

Date & Time : 11-08-2016 12:09:PM
So as i understand if I have added 7 cases in total... of which 3 cases are duplicate, then only those 3 cases will have the checkbox. Also, just for clarity if i do not select the check box for all the 3 modules (Import, new case, case entry), the the remaining cases that are not duplicate will be saved automatically.
If so, then this is ok.

Reply :
It's ok

Please check this statement :
Also, just for clarity if i do not select the check box for all the 3 modules (Import, new case, case entry), the the remaining cases that are not duplicate will be saved automatically.

Remaing cases which are not duplicate will be saved in the system. Additionally if out of 3 duplicate case if any 2 of them is checked then those cases will be saved also, excluding the one which is not checked.

Posted By : Navika Desai
D117
Date & Time : 11-08-2016 12:24:PM
Okay
Posted By : Bhavana Pachpande
D117
Date & Time : 11-08-2016 05:37:PM
We shall prepare files and test in mirror copy of live server(in local server) and then make changes in live.

This will start on Tuesday 16 Augst 2016.

Is it ok.
Posted By : Navika Desai
D117
Date & Time : 11-08-2016 06:20:PM
Ensure complete testing before uploading on live.
Posted By : Bhavana Pachpande
D117
Date & Time : 16-08-2016 02:06:PM
Point 49 is on live please check.
Posted By : Navika Desai
D117
Date & Time : 16-08-2016 02:14:PM
it was to be done on wed-thurs.

Any ways, will check and confirm.
Posted By : Bhavana Pachpande
D117
Date & Time : 16-08-2016 02:23:PM
Thursday is holiday as per Shimbi Holiday list. And it was already posted in this discussion on 11-Aug-2016 17:37:47 : " This will start on Tuesday 16 August 2016."
Posted By : Navika Desai
D117
Date & Time : 16-08-2016 04:06:PM
Point 49 - Tested okay on live.
Posted By : Bhavana Pachpande
D117
Date & Time : 16-08-2016 04:07:PM

So can we close this discussion

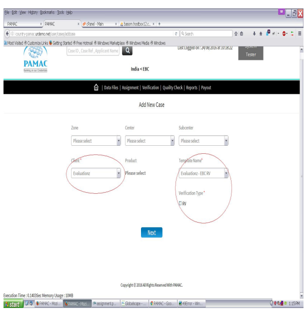
Posted By : Navika Desai
D117
Date & Time : 16-08-2016 04:12:PM
Okay.

Posted By : Bhavana Pachpande
D117
Date & Time : 16-08-2016 04:13:PM
Question is closed.

Posted By : Navika Desai
D117
Date & Time : 24-08-2016 11:56:AM
For EBC<Evaluationz there is no product, hence template is not seen in drop down, hence new case cannot be added. Screen shot attached.

New case error without product.docx
↧ Download

Posted By : Bhavana Pachpande
D117
Date & Time : 24-08-2016 01:16:PM
It is there i have checked it, screenshot attached.



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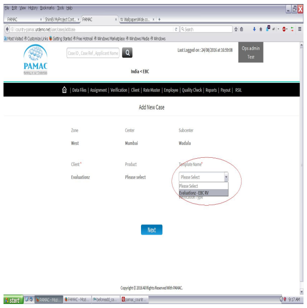
Posted By : Navika Desai
D117
Date & Time : 24-08-2016 05:01:PM
Template is seen when logged in from Mytest id

No seen in the below ID, please check with this:

Myopsadmintest
admin@123

Posted By : Bhavana Pachpande
D117
Date & Time : 25-08-2016 09:19:AM
Done, please check. Screenshot attached.



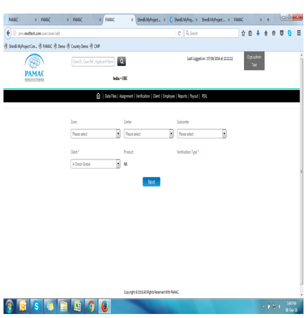
↧ Download

Posted By : Navika Desai
D117
Date & Time : 25-08-2016 10:48:AM
What was the reason for the error and what rectification action was done?
Posted By : Bhavana Pachpande
D117
Date & Time : 25-08-2016 01:45:PM
Client dropdown was not present as there was only one client. since no event(onchange) was occuring as in case when client dropdown was present, template dropdown didn't get populate.

Now when page is loaded automatically system checks whether client has only one value and post data is empty then template dropdown will populate according to that single client present.
Posted By : Navika Desai
D117
Date & Time : 25-08-2016 02:19:PM
Okay, thanks.

Please close the discussion.
Posted By : Bhavana Pachpande
D117
Date & Time : 25-08-2016 02:37:PM
Question is closed.
Posted By : Navika Desai
D117
Date & Time : 08-09-2016 03:52:PM
Another similar issue.

For EBC activity - Few clients dont have product and few clients have NA as product.
Here, when a client without product is selected(A-check), it takes the product as NA by default (fix) however A check does not have product to it.
Screen shot attached.



↧ Download

Posted By : Bhavana Pachpande
D117

Date & Time : 12-09-2016 10:23:AM
I have checked.

1) For EBC activity - Few clients dont have product and few clients have NA as product.

If only 1 product is present for that Activity then no dropdown will be shown. It will be fixed.

Now when a client is selected from the dropdown and there is no product added for that client as seen in Template Assign module then it's corresponding Vt will also not appear. (as because fixed product is also sent as a query to database inorder to check for VT)

EX : Client : "A-Check Global" in Template Assign module , there is no product. So no VT appears.

This issue was already present in the existing system. Must have missed during testing or this scenario was never considered. Will make changes and update by today in all demo plus live.
Posted By : Navika Desai
D117
Date & Time : 12-09-2016 12:18:PM
I agree we missed this during testing, Please make changes and confirm.
Posted By : Bhavana Pachpande
D117
Date & Time : 12-09-2016 04:47:PM
Changes are made and uploaded in both demo and live. Please check.
Posted By : Navika Desai
D117
Date & Time : 12-09-2016 05:35:PM
This has been checked okay on live.
Posted By : Bhavana Pachpande
D117
Date & Time : 13-09-2016 08:57:AM
Can we close?
Posted By : Navika Desai
D117
Date & Time : 13-09-2016 10:45:AM
Yes.
Posted By : Bhavana Pachpande
D117
Date & Time : 13-09-2016 11:30:AM
Question is closed.

Reply Cancel