

Toy Project - Research

Main Feature

- Clients Management 고객 관리에 중점을 둔 시스템
- 고객 관리, 질문지 작성, 문서 관리 기능
- 리마인더, 노트, e-mail, 캘린더 기능
- 장소에 상관 없이 직원 간 업무 분담이 가능하다
- 고객이 질문지를 작성하고 문서 업로드, 파일의 최신 상태를 갱신받는다.
- 자동화 된 오피스 온라인

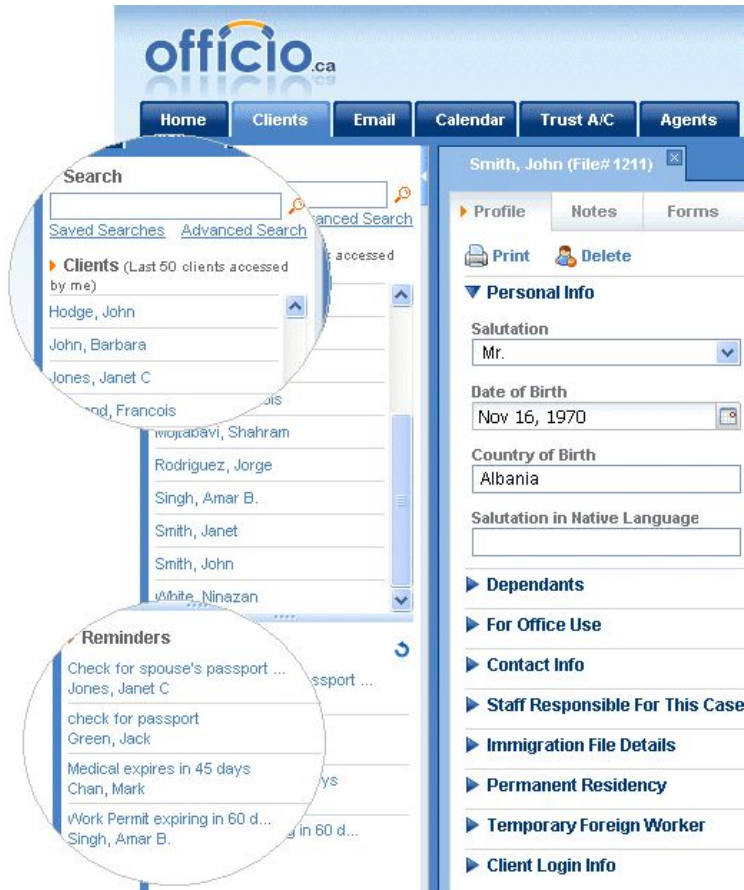
Toy system은 고객 관리, 질문지, 문서 등의 주요 기능을 각각 별개의 기능으로 두지 않고, 케이스 진행 순서에 따라 현재 상태와 앞으로 진행 방향을 한눈에 알 수 있도록 표현하는 것이 목표 (업체입장에서의 View)

리마인더를 통합한 일정관리 기능은 차후 결정할 예정

Toy 시스템의 목표와 동일하다

장소 뿐 아니라, 모바일, 태블릿PC, 랩탑 등 모든 디바이스에 최적화 된 시스템

Research 1 - Officio



Client Management 고객 관리

- 고객 프로필, 고객의 중요 날짜와 파일 정보
- 리마인더 시스템
- 상담 내용 메모 기능
- 직원 간 업무 할당 기능

직원 간의 업무 조율에
대한 기능은 Toy
시스템에서는 고려되지
않는다

Toy System 또한 고객 프로필 내에
메모 기능이 있도록 한다.
해당 기능은 기록된 최신 순서대로
리스트업 되어 있으며, 기록해야하는
메모의 종류가 정해져 있지 않아
고객에 따라 중요한 상담 정보를
기록할 수도 있고, 현재 케이스
상태에 대한 정보를 기록할 수도
있다.

The image shows three overlapping Canadian immigration forms. The top-left form is 'APPLICATION FOR PERMANENT RESIDENCE IN CANADA'. The top-right form is 'ADDITIONAL FAMILY INFORMATION'. The bottom form is 'DECLARATION OF SUPPORT'. Red arrows point from the text 'Featuring over 400 Federal, Quebec, Service Canada, Citizenship, and refugee forms.' to these forms.

Forms Management

- Featuring over 400 Federal, Quebec, Service Canada, Citizenship, and refugee forms. => 이민국에서 요구하는 서류를 그대로 고객이 작성할 수 있게 여러 타입의 폼을 업데이트 해주는 방식
- 비슷한 정보는 다른 양식의 질문지에도 자동으로 작성하게 해준다.
- English, French only

Toy 시스템은 이민국에서 요구하는 서류를 바로 작성하게 하지 않고, 고객이 빠르게 이해하고 답변할 수 있는 질문지 형태로 폼을 제공한다.

갱신되는 이민법에 따른 즉각적인 업데이트를 제공한다.

Research 1 - Officio

Forms Management

Safari File Edit View History Bookmarks Window Help
http://secure.officio.ca/forms/index/open-assigned-pdf/pdfid/25573#FDF=http://secure.officio.ca/forms/index/open-assigned-xfdf/pdfid/25573/merge/1
http://secure.officio.ca/forms/index/open-assigned-pdf/pdfid/25573#FDF=http://secure.officio.ca/forms/index/open-assigned-xfdf/pdfid/25573/merge/1
14K White G...mond Ring 14K White G...mond Ring White Rattan...s & Spencer butterfly va... Story Home button vase... Story Home Vivre - Voya...op: Product Vivre - Voya...op: Product

No Toolbar here

Save to Officio

Citizenship and Immigration Canada Citoyenneté et Immigration Canada

APPLICATION FOR PERMANENT RESIDENCE IN CANADA

PROTECTED WHEN COMPLETED - B
PAGE 1 OF 2

FOR OFFICE USE ONLY
Office file number (or IMM 1343 Case Label)

BEFORE YOU START, READ THE INSTRUCTION GUIDE
TYPE or PRINT in black ink

Category under which you are applying (see instructions)

Economic Classes

☐ Federal Skilled Worker ☐ Family Class

☐ Canadian Experience ☐ Refugee Class

Other

How many family members (including yourself) are included in this application for permanent residence in Canada?

Language you prefer for:

Correspondence: ☐ English ☐ French

Interview: ☐ English ☐ French Other

Visa Office requested for the process of your application:

1. Your full name (as shown in your passport or travel document)

Family name

Given name(s)

2. Your sex ☐ Male ☐ Female

3. Your date of birth Year Month Day

12. Education

How many years of formal education do you have?

What is your highest level of completed education?

☐ Secondary ☐ Bachelor's degree


☐ Tertiary ☐ Master's degree

☐ Trade/Apprenticeship ☐ Ph D

Space reserved for applicant's photo

Date of receipt stamp at post

These icons may appear on the bottom of the page.

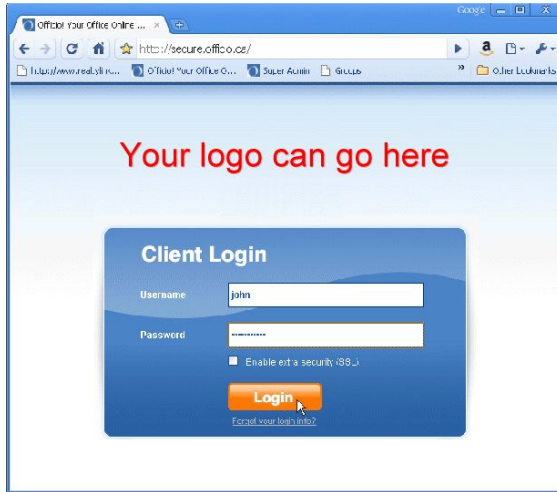


Research 1 - Offclo

Client Portal

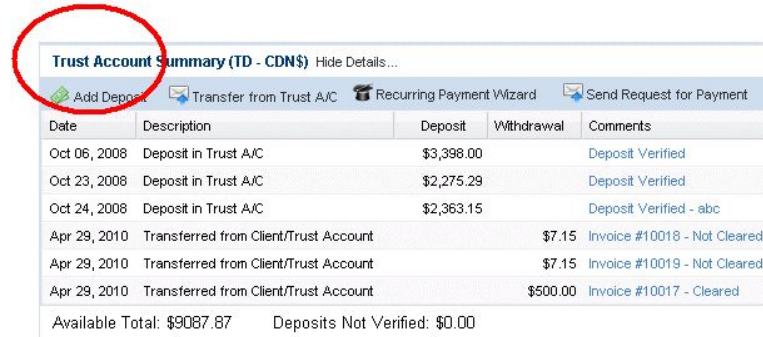
- 이민을 진행하는 고객은 소프트웨어가 아닌 웹에서 접속하게 되어있음

Toy 시스템은 모든 서비스가 웹 기반이다.



Client / Trust Account

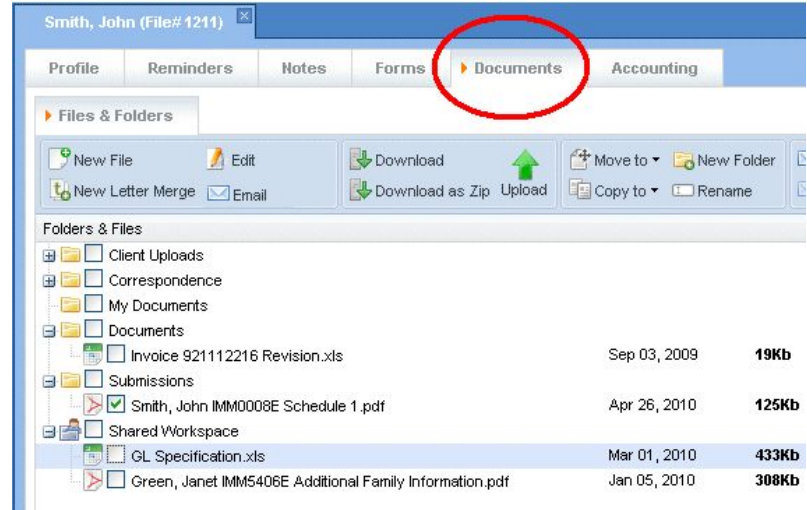
- 고객의 결제 날짜 확인
- 결제 만기일을 통보해 줌
- 은행 결제 기록을 임포트함



Date	Description	Deposit	Withdrawal	Comments
Oct 06, 2008	Deposit in Trust A/C	\$3,398.00		Deposit Verified
Oct 23, 2008	Deposit in Trust A/C	\$2,275.29		Deposit Verified
Oct 24, 2008	Deposit in Trust A/C	\$2,363.15		Deposit Verified - abc
Apr 29, 2010	Transferred from Client/Trust Account		\$7.15	Invoice #10018 - Not Cleared
Apr 29, 2010	Transferred from Client/Trust Account		\$7.15	Invoice #10019 - Not Cleared
Apr 29, 2010	Transferred from Client/Trust Account		\$500.00	Invoice #10017 - Cleared
Available Total: \$9087.87		Deposits Not Verified: \$0.00		

Document Management

- 어디서든 접속이 가능하도록 모든 문서들은 중앙 리파지토리에 유지된다.



[https://global.inszoom.com/CorpAttorney/sty_dshboard.aspx?phn_mig=False&QLlogin=Y](#)

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Forms 1.IMM5409E - Brian Johnso 2.IMM1294E-BC - Brian Johnso 3.EMP-5578E - David James 4.EMP-5575E - David James 5.IMM5409E - Michael Hawkes More... Case 1.**Temporary Resident Visa - Study Permit (Brian Jo... 2.Port Of Entry (POE) For Green And Spiegel LLP (Ca... 3.Labour Market Impact Assessment (LMIA) (David Jame... 4.**Temporary Resident Visa - Study Permit (Michael ... 5.**Temporary Resident Visa - Study Permit (Kate So... More...	<table border="1"> <thead> <tr> <th colspan="7">November 2016</th> </tr> <tr> <th>Sun</th> <th>Mon</th> <th>Tue</th> <th>Wed</th> <th>Thu</th> <th>Fri</th> <th>Sat</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td>1</td> <td>* 2</td> <td>* 3</td> <td>4</td> <td>* 5</td> </tr> <tr> <td>6</td> <td>7</td> <td>* 8</td> <td>* 9</td> <td>* 10</td> <td>11</td> <td>12</td> </tr> <tr> <td>13</td> <td>14</td> <td>15</td> <td>* 16</td> <td>17</td> <td>18</td> <td>19</td> </tr> <tr> <td>20</td> <td>21</td> <td>* 22</td> <td>* 23</td> <td>* 24</td> <td>25</td> <td>26</td> </tr> <tr> <td>27</td> <td>28</td> <td>29</td> <td>30</td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	November 2016							Sun	Mon	Tue	Wed	Thu	Fri	Sat			1	* 2	* 3	4	* 5	6	7	* 8	* 9	* 10	11	12	13	14	15	* 16	17	18	19	20	21	* 22	* 23	* 24	25	26	27	28	29	30											Business Unit: Search Show All Add New Applicant: Search Show All Add New Case: Search Advanced Search Prospective Applicant: Search Show All Add New 1.Jennifer Lawrence More...
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Appointments/Activities for Today X	Recently Visited Applica../Busines... Applicant 1.Brian Johnso 2.Carl Davidson 3.Kate Soto 4.David James 5.Michael Hawkes More... Business Unit 1.InSZoom Inc. 2.InSZoom Inc. (Canada) 3.InSZoom Inc. (India) More...	Case Reminders for Today X 1. Brian Johnso - Receive Study Permit And Visa From ... More...																																																								
Task To Do X 1.Meet Jennifer (Due Date : Dec 11 2015) More...	Case Request X 1.Work Permit (Canada) - Tim Hardy More...	Overdue Reminders X 1. Michael Hawkes - Send Approval Package To Applica... 2. Kate Soto - Send Approval Package To Applicant 3. Kate Hill - Application Closed 4. Grace Lee - Case Closed 5. Brian Johnso - File The Form With The Canadian Vis... 6. Kate Westwood - Send Approval Package To Applicant 7. Steve Pence - Application Closed 8. Michael Hawkes - Receive Study Permit And Visa Fro... 9. Kate Soto - Receive Study Permit And Visa From CIC 10.Carl Davidson - Complete Post-Work Permit Issuance... More...																																																								

GOOD

- 포털 화면에서 보고자 하는 내용을 유동적으로 추가할 수 있다.(스케줄, 최근 케이스, 할일 등등)
- 여러 내용을 한페이지에서 요약해서 볼 수 있다.

BAD

- 기능위주로 구성된 느낌이다.
- 다양한 내용들을 제공을 한다는 것은 장점일 수도 있으나 반대로 단점일 수있다.
- 이민 컨설턴트가 접속 했을때 바로 보고싶은 정말 필요한 정보 위주로 초기화면을 지정하는 것이 좋을 것 같다.
- 알아보기 쉬운 포털 디자인이 필요하다.

TOY SYSTEM

- 진행중인 케이스, CIC에 신청된 케이스, 접수된 케이스의 상태 정보를 이미지화 해서 보여준다.
- 앞으로 있을 리마인더 내용 및 안 읽은 쪽지에 대한 내용이 구성.
- 유동적으로 포털을 추가하는 기능은 필요없을 것으로 보인다.



File Edit View Favorites Tools Help

Google (2) Zumotools ApS DocuSign Google linkedin.com Login Salesforce Time Converter and Wor... inszoomCN10Login WebEx Meeting Center

Hello Edris Akbar, Access Level : Firm

INS-ZOOM

Prospects Business Unit Applicant Case Reports Billing Calendar Search Recent Records

Prospective Client

Personal Info Family Info School Info Profile Residence Info Immigration History Employment History Notes/Comments Custom Fields Data

1. Client Communication

Communication Summary Applicant Timers Applicant Appointments/Activities Tasks Applicant Phone Log Applicant Emails Applicant Pop Up Alerts Applicant Digital Docs Applicant Questionnaires

2. Client Billing

Applicant Invoice

3. Client Intake Sheet

Applicant Intake Sheet

4. Document Assembly

Applicant Letters (MS Word)

You are here: Resources >> Prospective Clients >> Individuals >> Client Digital Docs

List Of Uploaded Documents

Client : Jennifer Lawrence

Upload New File

Description	Folder	Size	Type
1 PHOTO	Photos (If, any)	279.35 KB	jpg Lock

Uploaded By: Edris Akbar-Jul 18 2016 11:40 AM
First Accessed By: Edris Akbar Jul 18 2016 11:40 AM
Recently Accessed By: Edris Akbar Sep 14 2016 8:38 AM

주 메뉴 영역
Prospects 메뉴 에서 상담 고객을
등록한다.

Prospects 관련 보조메뉴

GOOD

- 전화를 통해 고객을 상담하거나 대면 상담, 이메일 상담 등 새로운 고객을 상담하게 되면 고객 정보를 입력하여 관리할 수 있게 한다.
- 고객의 히스토리가 누적되어 추후 활용 가능하다.
- Invoice를 메일로 보내는 기능, 상담고객을 이민수속으로 전화하는 기능 등 여러 기능들을 제공한다.

BAD

- 정보를 기입하는 좌측의 메뉴들이 많아 조악해 보인다.
- 정보 기입 메뉴와 메일 보내기 등의 기능메뉴가 혼재되어 있다.

TOY SYSTEM

- 상담 고객을 관리하는 페이지를 제공하면 좋을 것 같다. 추후 해당 고객이 이민 수속 케이스로 변경되었을때 해당 상담 기록들도 같이 열람을 가능하게 해서 전체적인 히스토리를 기록 하는 용도로도 활용 될 수 있다.
- 상담에서 받는 고객 정보는 최대한 단순화하고 상담내용을 기록하는 측면에 중점을 둔다.

INS-ZOOM

Prospects Business Unit Applicant Case Reports Billing Calendar Search Recent

You are here: Resources >> Prospective Clients >> Individuals >> Personal Info

Accept prospective Applicant as Applicant

Accept as Applicant Edit Delete Go To List

1. Client Communication

- Communication Summary
- Applicant Timers
- Applicant Appointments/Activities
- Tasks
- Applicant Phone Log
- Applicant Emails
- Applicant Pop Up Alerts
- Applicant Digital Docs
- Applicant Questionnaires

2. Client Billing

- Applicant Invoice

3. Client Intake Sheet

- Applicant Intake Sheet

Personal Info

File/Control #	
Candidate / Prospective Employee Id	
Status	Active
Salutation	
First Name	Jennifer
Last Name	Lawrence
Middle Name	T.
Other Name	
Email Id	jtl@yahoo.net
Alternate Email Id	
Occupation	Software Engineer
Referral Source	News Media
Applicant Type	Employment Sponsorship
Service Type	IT

기존 등록된 고객의 상담 프로필
화면에서 **Accept as Applicant** 를 눌러
고객의 케이스를 등록한다

INS-ZOOM

Prospects Business Unit Applicant Case Reports Billing Calendar Search

Applicant > Business... Employees

Applicant Registration

Save Save & Send Email Save & Add New Cancel

Validation Summary

- Please Enter First Name
- Please Enter Last Name

Create New Applicant

Case Manager ID Aecand01

Client Default Country Canada

Applicant Type* Individual/Family Based

File Number

Salutation

First Name* Martha

Last Name* James

Middle Name

Main Contact* Yes

Gender

Home Telephone

Work Telephone

Mobile Number

Email

Save Save & Send Email Save & Add New Cancel

기본 정보를 입력할 수 있는 화면이
나온다.
Client default company, Applicant
Type, Name, Contact 를 입력

GOOD

- 버튼 한번으로 기존 상담고객에서 이민수속 케이스로 변경이 가능.

BAD

- 이민 수속 케이스로 진행 될 때에 별도의 정보를 또 입력 해야 한다. 전화번호, 주소 등등..

TOY SYSTEM

- 버튼을 눌러서 기존 상담 고객에서 이민 수속 케이스 진행으로 넘어갈 수 있도록 한다.

- 고객의 기본정보는 어차피 질문지로 답변을 받을때 기록이 되므로 굳이 이 단계에서 받지 않는다.

- 이메일은 필수로 받아 놓는다. 해당 이메일로 안내 메일이 날아가야 하기 때문이다.

Hello Edris Akbar , Access Level : Firm

INS-ZOOM

Prospects Business Unit Applicant Case Reports Billing Calendar Search Recent Records

Applicant Info

You are here : Family/Individual Applicants >> Zoom Guru

Martha James

Individual Applicant

Martha James

mj@... Add New Relative -9999(H) -- (W)

Add New Relatives

Applicant Cases & Forms

No cases found

Add New Case

A new file has been created for **Martha James**. Click on any options below to proceed further.

Update Profile

Option 1. [Click here to view/edit questionnaire\(s\).](#)

Option 2. [Click here to update Martha James's profile.](#)

가족을 추가하여 등록한다

Choose Petition Template Name

**이민수속 타입을 선택하는
팝업**

Petition: All Petitions

Petition Template Name: Contains

Find Show All

Petition Template Name	Petition Name	
1 **Labour Market Impact Assessment (LMIA)	Labour Market Impact Assessment (LMIA)	Choose
2 **Port of Entry (POE) for Green and Spiegel LLP	Port of Entry (POE) for Green and Spiegel LLP	Choose
3 **Temporary Resident Visa - Study permit	**Temporary Resident Visa - Study permit	Choose
4 *Alberta PNP - Skilled Worker	PNP Application (Alberta)	Choose
5 *Business Visa	*Business Visa	Choose
6 *Work Permit	*Work Permit	Choose
7 *Work Permit - Requiring LMIA	Work Permit - Requiring LMIA	Choose
8 *Work Permit (Intra-Company Transferee)	Work Permit (Intra-Company Transferee)	Choose

Please Select individual(s) who need forms for this Case

Firm Staff

Choose Case Manager Team: All Case Managers

Who will receive reminders

Check All Clear All

☒ Edris Akbar

Global Partner Info

Who will receive reminders: Add/Remove

Case Contacts

Case Contacts: Add/Remove

Save Cancel

INS-ZOOM

Prospects Business Unit Applicant Case Reports Billing Calendar Search Recent Records

Case Info

Applicant Profile
Case List
Search
Add Case
Petition Details
Zoom Guru
1. Detailed Info
Snapshot
Key Dates For Case
Profile
Details/Dates
Receipt Numbers
Proposed Job Info
Managers/Contacts
Status Docs
Custom Data
Travel Activity Details
2. Document Assembly
Docs Check List
Form/s
Letters (HTML)
Letters (MS Word)
Questionnaires
Digital Docs

You are here: Applicant >> Family/Individual Applicant >> Applicant Case List/Forms >> Case Details/Dates

Martha James
Work Permit - Requiring LMIA (KBGGEX00030-1)
+ Co-Applicant(s): (None)

Petition Related Info

Case Fees			
Receipt Number	R172358416 Check Status	Receipt Date	Nov 2 2016
Receipt Notice Date	Nov 15 2016	Expiration Alert**	✓
Approved On	Nov 21 2016	Valid From	Nov 23 2016
Expires On	Apr 19 2017	Sent To Gov. Agency On	Nov 21 2016
Comments		Approval Received By Firm On	Nov 22 2016

Case Info

Case Description	Work Permit - Requiring LMIA		
File Number		Physical File Location	
Case Opened Date	Nov 23 2016	Case Active Date	✓ Nov 23 2016
Current Case Status	Open On Nov 23 2016	Case Reminder Alert Flag	✓
Case Denied Date		Case Withdrawn Date	
Case Value Point			
Created By	Edris Akbar Nov 23 2016 9:19 AM	Last Updated By	Edris Akbar Nov 23 2016 9:43 AM

Canada

GOOD

- 고객 개인의 케이스를 관리하는 화면이 존재.
- 가족들을 추가하여 여러 이민을 수속 할 수 있도록 해놓음.
- 고객 개인의 케이스 화면에서 이민수속 타입을 선택하여 이민 수속을 진행할 수 있음

BAD

- 한 화면에서 고객의 케이스 정보를 파악 할 수 없다. 왼쪽 메뉴에 분리가 되어 있다.
- 상담 고객이 이민 수속 고객이 된다는 것은 이미 수속해야할 타입이 결정되었다는 것을 의미하는데 이민 수속 고객을 등록하고 또 버튼을 눌러서 이민 수속 타입을 따로 입력을 해야 한다.

TOY SYSTEM

- 한 화면에서 고객의 기본정보 케이스 정보와 질문지, 구비서류 목록을 확인 할 수 있도록 화면을 구성한다.
- 이민 수속 고객으로 전환 시 고객의 이민수속 타입을 바로 지정하게 한다.(질문서, 구비서류목록 셋팅도 같이 한다.)
- 가족들을 추가하는 기능을 만들어 주 신청자 고객 케이스 밑으로 정보가 들어가도록 한다.

INS-ZOOM

Prospects Business Unit Applicant Case Reports Billing Calendar Search Recent Records



Case Info

Applicant Profile

Case List

Search

Add Case ▶

Petition Details

Zoom Guru

1. Detailed Info

Snapshot ▶

Key Dates For Case

Profile ▶

Details/Dates ▶

Receipt Numbers

Proposed Job Info

Managers/Contacts

Status Docs

Custom Data ▶

Travel Activity Details

2. Document Assembly

Docs Check List ▶

Forms ▶

Letters (HTML) ▶

Letters (MS Word)

Questionnaires

Digital Docs

E-Consent

3. Communication

You are here: Applicant >> Family/Individual Applicant >> ApplicantCase List/Forms >> Case Docs Check List

Martha James

Work Permit - Requiring LMIA (KBGGK00030-1)

+ Co-Applicant(s): (None)

Add

Edit

Please select ▼

Download All

Bulk Print



Case Docs Check List

	Description ^	Required? ^	Requested Date ^	Received? ^	Received Date ^
From Martha James					
1	Copy of academic transcripts / mark sheets	Required		Not Received	Upload
2	Copy of certificates, diplomas, and /or degrees	Required		Not Received	Upload
3	Copy of current immigration document	If applicable		Not Received	Upload
4	Copy of previous immigration applications or requests (if applicable/available)	Required		Not Received	Upload
5	Copy of Resume of Curriculum Vitae	Required		Not Received	Upload
6	Copy of valid passport (including passport bio page and all stamped pages)	Required		Not Received	Upload
7	Passport sized photographs in the number and format required by filing location	Required		Not Received	Upload

Current Page : 1 Go to page : 01 of [1]

케이스 등록 후 Doc check list
메뉴에서 필요한 구비서류 목록과
현재 업로드 상태를 확인 할 수
있다.

Case Info

Applicant Profile
Case List
Search
Add Case ▶
Petition Details
Zoom Guru
1. Detailed Info
SnapShot ▶
Key Dates For Case
Profile ▶
Details / Dates ▶
Receipt Numbers
Proposed Job Info
Managers / Contacts
Status Docs
Custom Data ▶
Travel Activity Details
2. Document Assembly
Docs Check List ▶
Form/s ▶
Letters (HTML) ▶
Letters (MS Word)
Questionnaires
Digital Docs
E-Consent
3. Communication
Status & Reminders / Steps ▶
Deadline / Court / Interview Dates

You are here : Applicant >> Family/Individual Applicant >> Applicant Case List/Forms >> Case Form/s

Martha James
Work Permit - Requiring LMIA (KBGGEK00030-1) + Co-Applicant(s): (None)

Add Forms From: All forms list [v] [Email Forms] [Bulk Print] [Troubleshooting Forms Issues] [?]

Case Forms For Martha James

Forms	Description	Actions
1 IMM1295E-BC Edition: Oct 1 2015	IMM1295E: Application for Work Permit made outside of Canada Applicant : Martha James Created By : Last Updated By :	Select Form Utility [v] [✓]
2 IMM5257E-S1 Edition: Mar 1 2016	IMM5257E-S1: Schedule 1 Application for Temporary Resident Visa Applicant : Martha James Created By : Last Updated By :	Select Form Utility [v] [✓]
3 IMM5409E Edition: Apr 1 2015	IMM5409E: Statutory Declaration of Common-Law Union Applicant : Martha James Created By : Last Updated By :	Edit Select Form Utility [v] [✓]
4 IMM5476E Edition: Sep 1 2015	IMM5476E: Use of a Representative Applicant : Martha James Created By : Last Updated By :	Edit Select Form Utility [v] [✓]
5 IMM5488E Edition: Feb 1 2016	IMM5488E: Document Checklist for a Work Permit (Applied Outside Canada) Applicant : Martha James Created By : Last Updated By :	Edit Select Form Utility [v] [✓]
6 IMM5645E Edition: Sep 1 2010	IMM5645E: FAMILY INFORMATION Applicant : Martha James Created By : Last Updated By :	Edit Select Form Utility [v] [✓]

케이스 등록 후 고객이
직접 입력할 서류 목록

GOOD

- 질문지, 구비서류 목록을 셋팅할 수 있는 별도의 관리 메뉴가 존재.
- 실제 IMM 문서에 있는 질문내용에 맞춰서 질문지 셋팅이 됨.

BAD

- 질문내용, 각 케이스별 구비서류 목록 내용을 알아보기 어렵다.

TOY SYSTEM

- Toy 시스템 관리자가 이민 타입별 구비서류 목록, 질문지 내용 등을 업데이트 한다. 해당 내용은 기본내용으로 이민 컨설턴트들이 변경할 수 없게 한다.
- 이민 컨설턴트의 경우 필요한 구비서류 목록, 질문지 내용 등을 추가할 수 있는 관리화면을 제공한다.
- 추후 이민수속 고객으로 전환시에 구비서류 목록, 질문지의 추가한 내용을 넣거나 뺄수 있도록 화면을 제공한다.

케이스 진행 상황을 확인할 수 있는
페이지

Form/s ▶	Step Description/Internal Comments: Prepare application forms and letters				Updated By: Edris Akbar Nov 23 2016 9:19 AM		       Lock
Letters (HTML) ▶							
Letters (MS Word)							
Questionnaires							
Digital Docs							
E-Consent							
3. Communication							
Status & Reminders/Steps ▶							
Deadline/Court/Interview Dates							
Notes ▶							
Phone Log ▶							
Emails ▶							
Appointments/Activities ▶							
Tasks							
Timer ▶							
Pop Up Alerts ▶							
Shipping/Mailing Log ▶							
Communication Summary							
4. Security and Tools							
Case Access Rights							
Delete Case							
Close Case							
Copy/Move Notes							
Copy/Move - Notes/Email/Docs							
Events							
Travel Activities							
Revert Copy/Move Notes							
Shortcuts							
5. Vendors							
	4	Send application forms and letters for signature	Not Started	Nov 30 2016			Applicant : ✓
	Step Description/Internal Comments: Send application forms and letters for signature				Updated By: Edris Akbar Nov 23 2016 9:19 AM		       Lock
	5	Forward to applicant for processing and e-filing (if applicable)	Not Started	Nov 30 2016			Applicant : ✓
	Step Description/Internal Comments: Forward to applicant for processing and e-filing (if applicable)				Updated By: Edris Akbar Nov 23 2016 9:19 AM		       Lock
	6	Submit application to government agency	Not Started	Nov 30 2016			Applicant : ✓
	Step Description/Internal Comments: Submit application to government agency				Updated By: Edris Akbar Nov 23 2016 9:19 AM		       Lock
	7	Received decision	Not Started	Nov 30 2016			Applicant : ✓
	Step Description/Internal Comments: Received decision				Updated By: Edris Akbar Nov 23 2016 9:19 AM		       Lock
	8	Application closed	Not Started	Nov 30 2016			Applicant : ✓
	Step Description/Internal Comments: Application closed				Updated By: Edris Akbar Nov 23 2016 9:19 AM		       Lock

GOOD

- 이민 프로세스를 컨설턴트가 지정하고, 새로 넣거나 뺄 수 있다.
- 각 프로세스를 사용자가 수행했는지 확인이 가능하다.

BAD

- 직관적이지 않다.

TOY SYSTEM

- Toy 시스템 관리자가 이민 타입별 구비서류 목록, 질문지 내용 등을 업데이트 한다. 해당 내용은 기본내용으로 이민 컨설턴트들이 변경할 수 없게 한다.
- 이민 컨설턴트의 경우 필요한 구비서류 목록, 질문지 내용 등을 추가할 수 있는 관리화면을 제공한다.
- 추후 이민수속 고객으로 전환시에 구비서류 목록, 질문지의 추가한 내용을 넣거나 뺄 수 있도록 화면을 제공한다.

고객에게 접근 메일을 보내기 위한 설정 화면

Research 2 - INSZoom <http://www.inszoom.com/>

ello Edris Akbar , Access Level : Firm

INS-ZOOM

Prospects Business Unit Applicant Case Reports Billing Calendar Search Recent Record



Case Info

You are here : Applicant >> Family/Individual Applicant >> App

Martha James

Work Permit - Requiring LMIA (KBGGEK00030-1)

[Link](#) [Unlink](#) [Copy Questionnaires](#) [Email Questionnaires](#)

Questionnaire List For Martha James

	Name
1	IMM1295E: Application for Work Permit Made Outside Of Canada (From Employee) Linked By:Edris Akbar Nov 23 2016 9:19 AM
2	IMM1295E: Application for Work Permit Made Outside Of Canada (From Employer) Linked By:Edris Akbar Nov 23 2016 9:19 AM

고객에게 이메일로 질문지를 보낼 수 있는 버튼

(please make sure that the dates or the stamps are clearly legible, enlarge/darken copy if necessary).
6. Copies of pay stubs for the past three (3) months;
7. Description of your job responsibilities/duties/reporting relations (if there have been material changes since your last visa approval);
8. Marriage Certificate and/or Birth Certificate, for new family members since your last visa processing (non-Canadian citizen family member only);
9. Please update your (and your family member's) personal information on our online immigration case management system. Once logged in click on the Questionnaire section, where you will see a list of links for your Questionnaires.

Additional documentation may be requested in order to process your application.
Please contact us if you have any questions.
With best regards,

Edris Akbar | Account Executive | Office: 925-244-0600 Ext 231 Cell: 925-765-1264 Direct 925-338-7775 |

edris.akbar@inszoom.com
INSZoom.com Inc.

[Design](#) [HTML](#) [Preview](#)

[Advanced Options](#) [Add/Remove File](#)

Extranet Access

Priority

Vendor Access

Request View Receipt

Authorize Online Payment

Email Authentication

Access Date mm/dd/yyyy

고객이 로그인 했을때 보여질 내용

고객에게 보낼 질문지 목록과 접근 권한 및 결제 정보, 접근 만료 날짜를 설정하고 메일을 보낼 수 있도록 구성되어 있다.

Questionnaires For Martha James

[Link](#) [Unlink](#)

- 1 IMM1295E: Application for Work Permit Made Outside Of Canada (From Employee)
- 2 IMM1295E: Application for Work Permit Made Outside Of Canada (From Employer)
- 3 IMM5257B-S1: Schedule 1 Application For A Temporary Resident Visa Made Outside Of Canada
- 4 IMM5409E: Statutory Declaration of Common-Law Union

고객이 메일을 통해 접근한 후 답변할 질문지 설정 화면

Research 2 - INSZoom <http://www.inszoom.com/>

The screenshot displays the INSZoom web application interface. A modal dialog titled "Unlink Questionnaire" is open, showing a list of questionnaires for "Martha James". The dialog has buttons for "Save", "Check All", "Clear All", and "Cancel". The list includes:

- 1 ☐ IMM1295E: Application for Work Permit Made Outside Of Canada (From Employee)
- 2 ☒ IMM1295E: Application for Work Permit Made Outside Of Canada (From Employer)
- 3 ☐ IMM5257B-S1: Schedule 1 Application For A Temporary Resident Visa Made Outside Of Canada
- 4 ☐ IMM5409E: Statutory Declaration of Common-Law Union
- 5 ☐ IMM5476E: Use of a Representative
- 6 ☐ IMM5488E: Document Checklist For A Work Permit
- 7 ☐ IMM5645E: Family Information

The background interface shows a sidebar menu with options like "Phone Log", "Emails", "Appointments/Activities", "Tasks", "Timer", "Pop Up Alerts", "Shipping/Mailing Log", "Communication Summary", "4. Security and Tools", "5. Vendors", "6. Billing", and "More Options". The main content area displays a list of questionnaires for "Martha James" with checkboxes for selection.

고객이 답변 할 질문지를 추가하거나 제거할 수 있도록 구성되어 있다.

INS-ZOOM

Prospects Business Unit Applicant Case Reports Billing Calendar Search Recent Records



Case Info

Applicant Profile

Case List

Search

Add Case ▶

Petition Details

Zoom Guru

1. Detailed Info

SnapShot ▶

Key Dates For Case

Profile ▶

Details/Dates ▶

Receipt Numbers

Proposed Job Info

Managers/Contacts

Status Docs

Custom Data ▶

Travel Activity Details

2. Document Assembly

Docs Check List ▶

You are here : Applicant >> Family/Individual Applicant >> ApplicantCase List/Forms >> Case Emails

Martha James

Work Permit - Requiring LMIA (KBGGKE00030-1)

Compose Email Find Show Marked for Delete Emails **Show All**

Sort By Created Date Desc.

Sent Emails

	Date	From	To/Cc
1	Nov 23 2016 9:23 AM	edris.akbar@inszoom.net	mj@aol.net
		Subject: Questionnaires [KBGGKE00030-1]	
2	Nov 23 2016 9:19 AM	edris.akbar@inszoom.net	mj@aol.net
		Subject: Re: Martha James [KBGGKE00030-1] - Case Documents	
Current Page : 1 Go to page : 01 of [1]			

Received Emails

Date	From	To/Cc
No Received Emails found.		

Compose Draft

Drafts

Date	From	To/Cc
No Drafts found		

Case Emails 메뉴에서 이민컨설턴트가 보낸 이메일을 확인할 수 있다.

GOOD

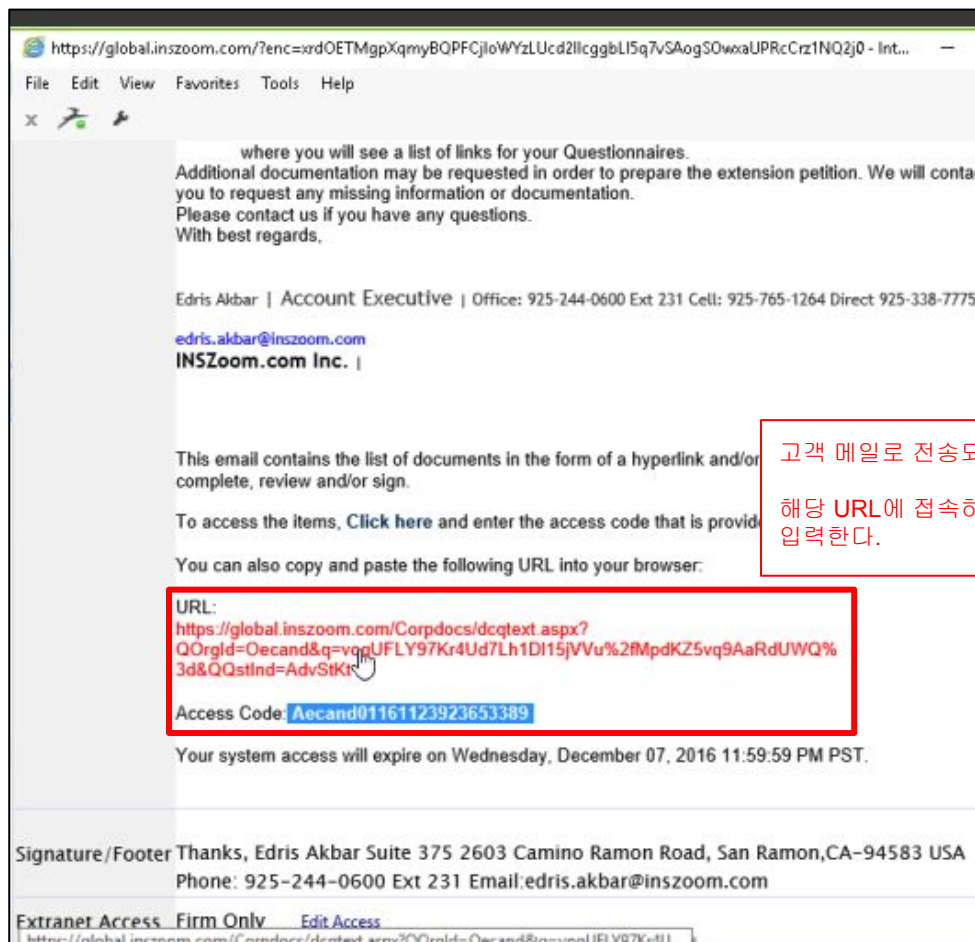
- 고객 마다 접근 권한을 설정하고 프라이빗 하게 접근할 수 있도록 프로세스가 짜여져 있다.
- 질문지나 구비서류 목록을 고객별로 설정하여 해당 고객이 답변하거나 업로드 할 목록을 조정 할수 있게 한다.
- 보낸 메일 리스트를 관리함으로써 히스토리를 쌓을 수 있다.
- 메일을 보낼때 관리자가 메일 내용을 적어서 같이 보낼수 있다.

BAD

- 단순히 메일을 보내는 것이 아니라 많은 조작을 해야 한다.


TOY SYSTEM

- 이민 케이스마다 정해져 있는 질문지와 구비서류 목록이 있으므로 단순히 컨설턴트가 고객에게 메일을 보낼수 있도록 한다.
- 이민 컨설턴트가 많은 조작을 하지 않도록 구성하는 것을 목표로 한다.
- 특별한 케이스일때 추가적인 안내 내용을 적을 수 있도록 메일 내용을 적을수 있는 기능을 제공한다.
- 고객의 접근제한 날짜를 일일이 지정하지 않고 기본으로 1주일로 정해 놓는다.
- 아이디와 패스워드를 부여해서 고객이 접근 할 수 있는 시스템으로 하면 좋을것 같다. (추후 고객이 자기의 상태 등을 확인하기 위해 계속 접근 할 수 있도록 조치.)



고객 메일로 전송되는 URL과 Access Code.

해당 URL에 접속하여 아래의 Access code를 입력한다.



Instructions From Firm

Please read the following instructions carefully before accessing the items listed below:
Please note that the questionnaires/forms sent with this email can be accessed from Nov 23 2016 To Dec 7 2016 only.

Dear Martha

Your **Work Permit - Requiring LMIA** status will expire on and we need to prepare an extension petition on your behalf. Please communicate directly with your Case Manager if you have any questions and copy all recipients of this e-mail.

Failure to file a timely extension may result in a loss of your lawful immigration status AND a loss of your employment authorization Individual Client. Please provide all the required items listed below within one week of receipt of this e-mail or notify your immigration department and our firm if there will be a delay.

How to Deliver Documents:
 There are two options for delivery. Please respond to this e-mail indicating when and how you will be forwarding the required documentation. You may:

- (a) Upload digital/scanned images to our online immigration case management system; or
- (b) Send clean legible copies via Express Mail to our office.

We highly recommend that you upload your documents to our secure online immigration case management system so that we can maintain a permanent record of this important information.

Please e-mail your Case Manager with the following information:

Do you (or any dependent family member) have an extension petition filed? (and if so, when was it filed?)

Generally, once the extension petition is filed and all the required items are submitted, the extension petition will be processed. Please check with your immigration department for any restrictions apply. Please check with your immigration department for any restrictions apply.

Required Documents:

1. Your current resume (listing your current experience);
2. L-1 visa status holders only: your current Organizational Chart (you may obtain one from upper management or HR);
3. Your (and those of each family member, if applicable) current passport biographical page with your photograph;
4. Your (and those of each family member, if applicable) passport pages with ALL CANADIAN Immigration entry stamps (please make sure that the dates of the stamps are clearly legible, enlarge/darken copy if necessary);
5. Copies of pay stubs for the past three (3) months;
6. Description of your job responsibilities/duties/reporting relations (if there have been material changes since your last visa approval);
7. Marriage Certificate and/or Birth Certificate, for new family members since your last visa processing (non-Canadian citizen family member only);
8. Please update your (and your family member's) personal information on our online immigration case management system. Once logged in click on the Questionnaire section, where you will see a list of links for your Questionnaires.

Additional documentation may be requested in order to prepare the extension petition. We will contact you to request any missing information or documentation.

Please contact us if you have any questions.

With best regards,

Edris Akbar | Account Executive | Office: 925-244-0600 Ext 231 Cell: 925-765-1264 Direct 925-338-7775 |
edris.akbar@inszoom.com
INSZoom.com Inc. |

Questionnaires For Martha James

Please fill out, edit or supplement the following questionnaire(s).

- 1 [Click here to Edit](#) IMM1295E: Application for Work Permit Made Outside Of Canada (From Employee)
3. Communication

Status & Reminders Steps

상단에 보여진 내용
- 이민컨설턴트가 적어놓은 내용이
분리된다.

질문지와 문서 업로드가 가능한 고객용 페이지 초기화면

Que

Please

1

2

3

4

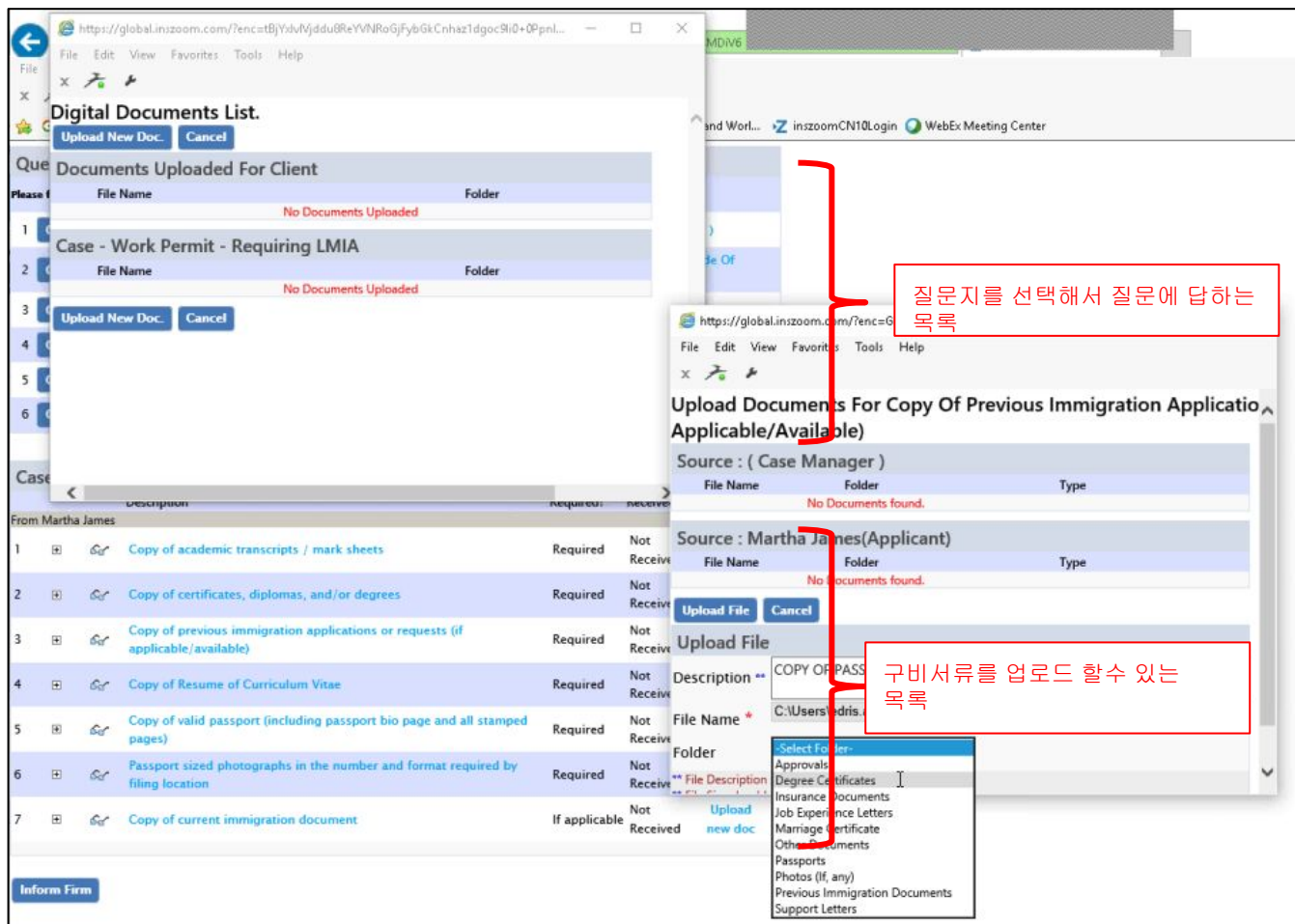
5

6

Case

From Martha James	Description	Required	Received	Upload new doc
1	Copy of academic transcripts / mark sheets	Required	Not Received	Upload new doc
2	Copy of certificates, diplomas, and/or degrees	Required	Not Received	Upload new doc
3	Copy of previous immigration applications or requests (if applicable/available)	Required	Not Received	Upload new doc
4	Copy of Resume of Curriculum Vitae	Required	Not Received	Upload new doc
5	Copy of valid passport (including passport bio page and all stamped pages)	Required	Not Received	Upload new doc
6	Passport sized photographs in the number and format required by filing location	Required	Not Received	Upload new doc
7	Copy of current immigration document	If applicable	Not Received	Upload new doc

Inform Firm



GOOD

- 이메일을 통해 고객에게만 URL과 Access Code를 전달하여 접속하게 한다. 시스템 보안을 위한 측면이라 생각된다.
- URL을 통해 시스템에 접속하면 질문지와 구비서류 목록을 확인 하고 고객이 작성하도록 한다.

BAD

- 한 화면에 많은 것을 담고 있다.
- 질문지에 답변을 위해 별도로 선택해서 들어가야 한다.

TOY SYSTEM

- 고객 페이지가 존재하기 때문에 메일로 시스템에 접속 할 수 있는 아이디(이메일 주소)와 임시 비밀번호를 전달하도록 한다.
- 고객이 첫 접속하게 되면 비밀번호를 변경하게 한다.
- 고객이 Toy시스템에 접속하면 프로세스에 맞게 진행하도록 한다.(한 화면씩 보여주거나 한 탭씩 보여줌으로써 복잡하지 않도록 한다.)
- 고객이 직접 질문지와 구비서류 목록을 업로드하도록 한다.

Select Language ▼

IMM1295E: Application For Work Permit Made Outside Of Canada (From Employee)

Employee Information (Martha James) Page 1 Of 6

Personal Information

- 1

Family name*

James
- 2

Given name(s)*

Martha

Middle Name
- 3

Middle name

A
- 4

Sex

Female ▼
- 5

Current Marital status

Select Marital Status ▼
- 6

E-mail address

mj@aol.net

https://global.inszoom.com/?enc=cfjnSU0E6AF4pknu3Kx1V3B1w66Z9M1+Fds5hNPgu6wLRFb8My80KxZdA2o - Internet Explorer

879797ASD546456

Name (as it appears on passport)

2 Given name(s) (as shown on your passport or travel document)

SAME

3 Family name (as shown on your passport or travel document)

SAME

4 Issue date (YYYY-MM-DD)

11/03/2010 mm/dd/yyyy

5 Expiry Date (YYYY-MM-DD)

04/20/2017 mm/dd/yyyy

6 Country of issue

Korea, Republic of (South Korea) Korea, Republic of (South Korea)

7 Date of Birth (YYYY-MM-DD)

Day 9 Month Nov Year 1980

8 City/Town of birth

Country of birth

Korea, Republic of (South Korea) Korea, Republic of (South Korea)

답변하고 저장, 취소 등의 버튼이 하단에 위치한다.

Save Previous Save And Next Next Cancel

9:26 AM 11/23/2016

INS-ZOOM

Questionnaire : IMM1295E: Application For Work Permit Made Outside Of Canada (From Employer)

Applicant Name : Martha James

Principal Applicant's Information Verify and Inform Case Manager

1 2 3 4 5 6

Personal Information

Click here to Edit

1 Family name*
James

2 Given name(s)*
Martha

3 Middle name
A.

4 Sex
Female

5 Current Marital status
Married

6 E-mail address

3. Communication

Status & Reminders/Steps

Select Language

Afrikaans	Bulgarian	Esperanto	Malian Creole	Italian	Latvian	Myanmar (Burmese)	Scots Gaelic	Swahili	Welsh
Albanian	Catalan	Estonian	Hausa	Japanese	Lithuanian	Nepali	Serbian	Swedish	Xhosa
Amharic	Cebuano	Filipino	Hawaiian	Javanese	Luxembourgish	Norwegian	Sesotho	Tajik	Yiddish
Arabic	Chichewa	Finnish	Hebrew	Kannada	Macedonian	Pashto	Shona	Tamil	Yoruba
Armenian	Chinese (Simplified)	French	Hindi	Kazakh	Malagasy	Persian	Sindhi	Telugu	Zulu
Azerbaijani	Chinese (Traditional)	Frisian	Hmong	Khmer	Malay	Polish	Sinhala	Thai	
Basque	Corsican	Gaelic	Hungarian	Korean	Malayalam	Portuguese	Slovak	Turkish	
Belarusian	Croatian	Georgian	Icelandic	Kurdish (Kurmanji)	Maltese	Punjabi	Slovenian	Ukrainian	
Bengali	Czech	German	Igbo	Kyrgyz	Maori	Romanian	Somali	Urdu	
Bosnian	Danish	Greek	Indonesian	Lao	Marathi	Russian	Spanish	Uzbek	
	Dutch	Gujarati	Irish	Latin	Mongolian	Samoan	Sundanese	Vietnamese	

구글 번역기로 언어를 변환한다.

Google Translator

Select Language

이민 컨설턴트 질문지 답 확인 화면

Research 2 - INSZoom <http://www.inszoom.com/>

The screenshot displays the INSZoom web application interface. On the left, a sidebar menu shows various navigation options, including 'Case Info', 'Applicant Profile', and 'Detailed Info'. The main content area shows a list of cases for 'Martha James'. A red box highlights the 'IMM1295E-BC' case, with a text overlay indicating that this is the case selected in the IMM document list.

Below the case list, a detailed form for 'IMM1295E-BC' is shown. The form includes fields for personal information, contact details, and work-related information. A red box highlights the 'Telephone no.' field, showing the number '4168889999'. Another red box highlights the 'E-mail address' field, showing 'mj@aol.net'.

The form also includes a section for 'DETAILS OF INTENDED WORK IN CANADA', which is partially visible at the bottom.

GOOD

- 간단하게 고객이 답변할 수 있도록 질문지를 구성해 놓았다
- 임시저장, 취소, 다음 등의 기능을 지원한다.
- 언어변환 기능이 존재한다.
- 고객이 질문지에 답한 것을 이민컨설턴트는 고객 케이스 화면의 IMM문서를 클릭해 확인 할 수 있는데 확인해 보면, IMM문서에 바로 고객이 답한 것이 들어가 있다.

BAD

- 언어 변환을 구글 번역기를 활용함으로써 번역이 완벽하지 않다.
- IMM 문서에 바로 들어가게 되면 고객이 실수한 내용을 위해 확인을 또 해야 한다.

TOY SYSTEM

- 질문지를 최대한 단순하게 구성한다.
- 한국어, 중국어, 베트남어, 러시아어 원어민의 도움을 받아 100% 언어팩을 지원한다.
- 질문지나 구비서류 작성 시 임시 저장이 가능하게 한다.
- 고객이 답변한 내용을 추후 이민 컨설턴트가 IMM문서를 작성할때 참조하기 쉬운 형태로 구성해서 보여준다. (book mark 형식으로 '경력'을 누르면 경력이 나온다던지...)

이민 컨설턴트의 고객 Status 확인 화면

Research 2 - INSZoom <http://www.inszoom.com/>

Case Info

Applicant Profile
Case List
Search
Add Case
Petition Details
Zoom Guru

1. Detailed Info
Snapshot
Key Dates For Case
Profile
Details/Dates
Receipt Numbers
Proposed Job Info
Managers/Contacts
Status Docs
Custom Data
Travel Activity Details

2. Document Assembly
Docs Check List
Form/s
Letters (HTML)
Letters (MS Word)
Questionnaires
Digital Docs
E-Consent

3. Communication
Status & Reminders/Steps

You are here : Applicant >> Family/Individual Applicant >> ApplicantCase List/Forms >> Case Status & Reminders/Steps

Martha James
Work Permit - Requiring LMIA (KBGGEK00030-1)
Co-Applicant(s) (None)

Case Status
Please select
Case Status: Open Change Status
Status Progress: 1 2 3 4 5 6 7 8

진행된 Status 확인 창

Steps	Name	Status	Reminder/Estimated Date	Deadline Date	Completion Date	Applicant/Business Unit Access
✓ 1	Send questionnaires and documents checklist to applicant Step Description/Internal Comments: Send questionnaires and documents checklist to applicant Updated By: Edris Akbar Nov 23 2016 9:29 AM	Completed	Nov 23 2016		Nov 23 2016	Applicant : ✓
✓ 2	Review questionnaires and returned documents Step Description/Internal Comments: Review questionnaires and returned documents Updated By: Edris Akbar Nov 23 2016 9:29 AM	Completed	Nov 26 2016		Nov 23 2016	Applicant : ✓
✓ 3	Prepare application forms and letters Step Description/Internal Comments: Prepare application forms and letters Updated By: Edris Akbar Nov 23 2016 9:29 AM	Completed	Nov 28 2016		Nov 23 2016	Applicant : ✓
✓ 4	Send application forms and letters for signature Step Description/Internal Comments: Send application forms and letters for signature Updated By: Edris Akbar Nov 23 2016 9:29 AM	Completed	Nov 30 2016		Nov 23 2016	Applicant : ✓

GOOD

- 고객의 진행 상황과 전체 프로세스를 확인 할수 있는 **status Bar**가 존재한다.

BAD

- 각 프로세스에 해당하는 버튼 옵션들이 많아 복잡하다.

TOY SYSTEM

- 프로세스 확인을 위한 내용만 직관적으로 표시해 준다.