PROCURELINE
Simplification Redefined

Procureline: Next Generation Global Resource Management System (Vendor Management, Employee/consultant Management, Timesheet, Invoice, Requisition Management, Internal Recruitment Dashboard-Performance Activity, Communication System(Chat/Email)

Procureline> Technical Specification:

1. Java 1.8 (Programming Language)
2. Spring Framework 3.1.1. RELEASE (To ease the interaction between different component)
3. Hibernate 3.6.0. Final (Mediator with Backend DB)
4. MySQL 5.1.30 (DB)
5. SendGrid-java 4.1.0 (for mailing)
6. Twilio 7.32.0

Product Issue:

- Loading Time issue> Taking more than 20 seconds to login.
- Home page button (PL Logo) not functioning.
- Notification section not working
- Twillo Otp(Two factor authentication)- for login (does not work properly in other operator except Reliance JIO, It needs to work on USA cell phone as well.
- Menu wise – Dynamic permission required, so we can make any type of users from any division and give required menu permission.
  Example (Timesheet Approver user, Legal user- For Document verification) etc.
- AT the time of disapproving documents> Comment section is required.

Procureline Process Flow>

Panels/Logins>

- Super Admin
- Admin
- Vendor
- Consultant
- 1099 User
- Employee
- Recruiter- Manager/Account Manager
- Recruiter

Super Admin panel>

Contents: Menu's and Submenus TAB, Notification Section (Whenever any task completed on PL a message triggered on notification section, Central Search option, Super Admin Profile(Logout Section).

Dashboard> Filled with Menus, Submenus, Upcoming Interviews, Performance chart (Performance Includes: Number of Submission by Recruiter, Number of Interviews and Selection/Hires Done) It should change every day.

Settings & Management Menu>

Manage Admin user:

- **Flow>** After Adding admin user by filling up the _Admin user information the user get deactivated and blocked by default.

>From The Admin user management dashboard_ Need to activate and Unblock the user after verifying that user has added with right information.

Admin user Management:

SL No.	Photo(Optional)	Name(Hyperlinked to Edit section)	Designation	Email ID(domain validation)	Phone No.(10 Digit validation)	Action
1		Test	Test	test@.com	773***	Edit, Block/Unblock,Activate/Deactivate,view, Delete(Recycle bin)

- **Vendor Management>**

SL No.	Admin Name	Logo	Point of contact	Company Name	Vendor Email ID	Ph No.	Contract Start date	Contract End date	No. of consultant	Documents Verified	Vendor documents	Action
1	Test		(POC Name)	Vendor Name	Test.@com	10 Digit				View-Status	(Section to upload vendor documents from sadmin)	Edit..

Action Button> Super admin can Edit, Block/Unblock,Activate/Deactivate,view, Delete(Recycle bin)

Search Option: (It will be used to search vendor on this page)

Add vendor Short Details: Super admin will add vendor minimum information and generate a login , vendor will receive the login information and fill up vendor onboarding form with all mandatory details.

Add vendor Full Details: Admin user will collect and forward all information of vendor to super admin and superadmin will add vendor full details on PL.

Flow> Once vendor is added and activated, Vendor will need to login to PL as a vendor and fill up all details (if short details added by super admin).
Step 2> There are standard vendor onboarding documents which is uploaded on PL, Vendor will need to download > Fill and Sign the form and upload into PL

Alternate way(Requirement)> Need to create e-form so vendor can fill and sign the form online and submit.
Action Button> Super admin- will go to action button> Vendor Documents> Upload filled and signed documents which come from vendor via email.
(Docs Verification)> 1st level- Documents will be verified and approved/disapprove by **Admin,** Notification and email will be triggered to sadmin and vendor that admin has verified the documents of xyz vendor with the documents name .
2nd Level> Documents will be verified and approve/disapprove by sadmin user. Notification and email will be triggered to admin, sadmin's and vendor that documents has been approve/disapprove by sadmin.

Step 3> Super admin will go to Action button> Verify documents> Download approve file and sent that to PTS legal for counter signature > Upload the files.

- Notification and email will be triggered to all and countersigned docs will be visible to all.

Consultant Management: **(** The employees who are not US Citizen holding VISA's like H1B,H4EAD etc and VISA sponsored by some other companies to get the work permit in USA will be treated as consultant when we onboard them for any job requirements.

Example: A person having experience as ETL developer submitted to a position ETL Developer and his/her visa sponsored by other company like CTL , then we are onboarding the candidate as Cop to cop-Corporation to corporation(Taxes will be paid by employer not us or client) Payment will be made by us to the Corporation not to the candidate .

Consultant List dashboard, Search option, Add consultant; Add project to consultant.

- Consultant code will be generated automatically.
- Validation on Consultant Name- letters only, Phone-10 digit, Email domain-@/.com,

  Flow> Vendor will add the consultant- Notification will be triggered to admin, sadmin, vendor. Super admin will activate and Unblock the consultant and generate login details. (This permission can be given to admin user)

  If vendor do not add consultant> Superadmin can add the consultant after getting the required details.

  Step2> After generating the login details > Consultant will receive the credential and login to PL. Consultant will need to fill up onboarding form(with all details required).
  Consultant will receive a notification to fill up,sign and upload the documents.

  Once consultant upload the documents/ Fill in, sign and submit the documents> Notification will be triggered to vendor, admin, sadmin .

  Admin and samdin will need to verify and approve/disapprove the documents (Notification and email will be triggered to consultant, vendor, sadmin and admin once documents approve/disapprove) .

  Consultant document can be uploaded from Sadmin panel> Consultant List> Documents> Upload signed documents.

  Step 3> Assign Project To consultant> This section will allow to add preloaded projects to onboarded consultant.

  Step4> Add work Order> (Work order will be added by Admin user but super admin user can also add this)

  One Work order form will open>
  Consultant> (Preloaded consultant Name)
  Vendor>(Preloaded vendor Name)
  Start Date> Need to select the start date
  Duration: By default, it will show- 6 months with possible extension
  Bill Rate: (it will show the amount = Pay rate of Consultant)
  OT Rate: 00- by default
  Client Name: It will be preloaded client name will have a dropdown option
  Invoicing terms: Monthly with approved timesheet
  Payment terms: by default (Net 30)
  Note: (5% discount or No Discount) Depend on the client name- Already in the current live database.

Signature Part:

By default it will show:

Name: Aurica Bhattacharya(Should have an dynamic menu to change this in Future)
Designation: (Legal counsel)
Company Name: (Procure Techstaff Consulting Services)
Signature:

Vendor Section:

(Name of POC)
Designation (of POC)
Company Name:
Signature:

(Once it is added notification will be triggered to Sadmin for approval> Once approved by sadmin notification will be triggered to Vendor to sign> Once it is signed by vendor legal user/Super admin will get an notification to sign (E-sign) on the work order.

Note: E-signature is required for the work order, IP Address tracking is required at the time of signature.

Employee Management/ Manage Employees: Same type of Process Flow as consultant with Little changes.

Description: A candidate is holding GC Visa or US Citizen when on boarded for any requirement will be treated as our employee, will work under our payroll and may report to client directly.

Process Flow in short:
Step1 After adding employee by admin user notification and email will be triggered to sadmin to activate and unblock the employee.

Employee can be added directly by sadmin.

Step2> Generate login details> Login details will be sent directly to employee email id.
/ Employee need to login to PL and Fill up onboarding form(Fill up necessary details required)
Employee need to Fill,sign and upload the required docs to PL/ E-sign and submit the documents.

Notification will be triggered to Admin and Sadmin to approve the docs.

Step3> Admin will approve/disapprove the documents and notification will be triggered to sadmin to approve the docs . Sadmin will approve /disapprove the docs and notication will be sent to Employee, Admin and sadmin.

Step4> Assign Project To Employee> This section will allow to add preloaded projects to onboarded Employee

Manage 1099 User: **1099** User – Has Individual corporation who pays his/her taxes, combination of vendor, Consultant, Employee.

Flow> Same as consultant .

Manager Recruiter Manager : Here we will add Account/Recruiter Manager who will have access to create requisition, assign requisition to recruiter and all other access related to requisitions

Flow> Add recruiter manager> Activate .

SL No.	Image	Name	Email	Status	Action
1		Test	test@gmail.com	**Activated**	**Ac/De-activate,Edit,Delete(Recycle bin)**

Manage Superadmin User : Here we will add sub- super admin users who will have all permission like super admin but cannot delete the main superadmin user.

Add Super admin, Search box.

SL No.	Image	Name	Email	Status	Action
1		Test	test@gmail.com	**Activated**	**Ac/De-activate,Edit,Delete(Recycle bin)**

Pending>

Recruiter Management:

Add Recruiter> First Name, Last Name, Designation, DOJ, Phone, Email ID, Location

SL No.	Recruiter Code	Name	Company Name	Work Phone	Email	DOJ	Status	Action

1	RECU000	AB C	PTS Consulting Services	10 Digit	Domain validation	Mm/dd/yy	Activated	**Ac/De-activate,Edit,Delete(Recycle bin)**

Pending>

Manage Super Admin Permission :

Manage Admin user, Manage Vendor user, Vendor Documents, Manage Consultant, Manage Documents, Manage Employee, Manage Projects, Manage Invoice, Update Profile, Manage Super-Admin User, Manage Permissions, Manage Notifications, Communication, Manage User Account.

Yes/ No.

Manage Admin Permission: Manage vendor User, Manage consultant, Manage Employee, Manage Projects, Manage Invoice, Update Profile, Manage notification, Communications, Manage vendor user, Manage Consultant, Manage employee, Manage 1099 user, Manage Project, Manage Invoice, Update profile, Manage notification, Communication.

Yes/ No.

Manage Recruiter, Manage Account/Recruiter Manager Dynamic Permission- pending.

Document Menu>

Vendor Document Management:

Flow> (He we can add any new document form which will show to vendor documents section

Add Vendor Documentation> Document name> Upload the PDF file.

SL No.	Document Name	File	Action
1	W-9 FORM	View Document	**Edit Document Name/ Upload Document, Required Delete Button**
2	SUBCONTRACTOR MANDATORY INSURANCE REQUIREMENTS	View Document	**Edit Document Name/ Upload Document, Required Delete Button**
3	NDA FORM	View Document	**Edit Document Name/ Upload**

			Document, Required Delete Button
4	COMPANY SUBCONTRACTOR AGREEMENT	View Document	**Edit Document Name/ Upload Document, Required Delete Button**
5	ACH FORM new	View Document	**Edit Document Name/ Upload Document, Required Delete Button**

Consultant & Employee Doc List:

Add Manage Documentation: Document Name, Upload new document.

- **Employee-**
- Consultant-

SL No.	Required for	Document Name	File	Action
1	Employee, Consultant	PTS APPLICATION FORM	View Doc	**Edit Document Name/ Upload Document, Required Delete Button**
2	Employee, Consultant	APPLICANT DISCLOSURE STATEMENT	View Doc	**Edit Document Name/ Upload Document, Required Delete Button**
3	Consultant	VISA FORM	View Doc	**Edit Document Name/ Upload Document, Required Delete Button**
4	Consultant	EVERIFY	View Doc	**Edit Document Name/ Upload Document, Required Delete Button**
5	Employee	PTS EMPLOYEE AGREEMENT - YEARLY	View Doc	**Edit Document Name/ Upload Document, Required Delete Button**
6	Employee	FORM W-4	View Doc	**Edit Document Name/ Upload**

				Document, Required Delete Button
7	Employee	FORM I-9	View Doc	**Edit Document Name/ Upload Document, Required Delete Button**
8	Employee	DIRECT DEPOSIT FORM	View Doc	**Edit Document Name/ Upload Document, Required Delete Button**
9	Employee	EMPLOYEE HANDBOOK	View Doc	**Edit Document Name/ Upload Document, Required Delete Button**
10	Employee	SSA AND SSN VERIFICATION	View Doc	**Edit Document Name/ Upload Document, Required Delete Button**

1099 User Document List: Pending

PTS Internal File Management:
Add Consultant/ Employee Internal Files> Document Name, Add Consultant/ Employee

Chose file> Add Document

SL No.	Code	Name	Email	Designation	Category	Total Files
1	EMP/Con Code	Test	test@gmail.com	IT		2> View/Download

Requisition: (Job Requirement)- Here we can add/ view new requisition

Add Requisition Project: (Here we can add new job requirement (Need to follow the page).
Search Requisition: View/Search Jobs

Sl No.	Req ID	Job Title	Start	End Date	No of Openings	Max Allowed	No. Of Recruiter	No. Of Candidates	Job Status	Action

			Date				Assigned			
1	REC201(Hyperlinked to Submission Page)	Java Dev	Start date	End Date	No. Of opening	5	1 Assigned	3	Open	Edit, Delete

After searching and clicking on requirement we can look up added candidate and submit against the requirement.

Pending> Need To have a direct option for Onboarding link.

Dashboard View> Pending (Candidate Submission View, Requisition View) > Need to discuss this point.

Talent Management> Here we can add/ View/Edit candidates, Need to discuss this point. (Pending Word- Add candidate)

SL No.	Candidate	View	Address	Contact No.	Candidate email	Job Details	Action
1	Jony S	Resume	NJ	10 Digit	jony@gmail.com	(It will show the req)	Edit,Delete

Reports- Timesheet & Invoice Management>
(Most of The work is pending)

Reports> Submission Reports with Filter option, Requisition Report, On-boarding Reports.> Pending
Invoice> (Need to generate the Invoices against Timesheet and work order) Need to discuss this point> Pending

Timesheet> Here we can view /add the timesheets(Employee,consuktant,1099 User) candidates can enter their timesheets.

Pending> Add employee, candidate timesheet, Approve timesheet.

Communication & Notification>
Calendar> It will show Interview dates, Start dates on Various color with details. (Need to discuss)

Help> (Help Topics> Any one can search the help topics and find the related docs) - Pending

Compose mail, sent email, Inbox> Mail within Procureline> Pending

Chat System> (Need to discuss) > Vendors, Candidates, Employees etc can chat with Support and Onboarding Team.