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| 27th Apr 2023 |

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Corporate Data Non Financial Process- User Stories

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| **QMS Document ID:** | **DPA/PRJ/ / /** | **Version No. 1.0** |

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**Document Revision History**

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| **Version** | **Date** | **Details** |
| 1.0 | 27-04-2023 | Corporate Data Process – convert html reports in pdf, update file master for accepted reports and update fiscal quarter and report date |

**User story –**

Application required to create file\_master id and update the below columns information in file master which is available in staging table and if report is available in html then convert it in pdf and store it on S3 bucket.

**Functional Flow –**

**For Corporate Pulse users– this page should link to the Current CDP portal**

1. Tool should create file master id for accepted entries from staging table (*refer status column*) and update the below fields information in file\_master table for UK and CA and create file master id for US reports.

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| --- | --- |
| **Column Name** | **Input From** |
| file\_master\_id | Auto Incremental |
| company\_id | Company\_id (*from staging table*) |
| original\_source\_link | source\_url (*from staging table*) |
| financial\_period | **as per staging table** |
| custom\_source\_link | PDF file link (*pdf upload link of S3* ) |
| filing\_date | filling\_date (stagging table) |
| file\_type | form\_type |
| fiscal\_quarter | *from staging table* |
| report\_date | *from staging table* |
| is\_active | As per Company Master |

\*accept rest fields as null in file master table.

1. Converted pdf should be save on S3 bucket.
2. For the UK reports where fiscal quarter period is Q4 update is process flag as follows: -

Only Financial Processed = is process flag is 1 (flag updates after is\_standard stage)

Only Non-Financial Processed = is process flag is 2

Financial and NF both types processed = process flag is 3



* + Acceptance Criteria: -
* File Master is should be unique for each period.
* HTML files should be converted for the Accepted entries in pdf format and store in S3 bucket.
* Is process flag in file\_master id for UK Q4 fiscal quarter period as follows:-

Only Financial Processed = is process flag is 1

Only Non-Financial Processed = is process flag is 2

Financial and NF both types processed = process flag is 3