**Project Requirements Document for Task Management Feature**

**1. Introduction**

This document outlines the requirements for the Task Management feature of the Collateral Evaluation System. The feature will allow Relationship Managers (RMs) to register cases, manage collateral, and share tasks with lists of RMs within the same unit (supervisor) appear.

**2. Scope**

The Task Management feature will enable RMs to:

* Register cases and associated collateral.
* Share tasks related to case with other RM.
* Monitor and manage task statuses and deadlines.

**3. Requirements**

**3.1 Functional Requirements**

* Add a Task Management feature to the Case Create page.
* When RM access is given supervisor should be selected with the same department.
* There will be menu to see shared cases and to assign new case to other RM’s
* Shared cases will display on to the same case list separated by some icon.
* When a case is shared there should be a role selected to the particular RM with Particular Case.
* RM’s will get notify when cases are assigned and revoked to/from them.
* RMs should be able to add one or more RMs to share tasks related to a specific customer with the same reference number.
  + **Note**: Tasks shared by the case creator will retain the same reference number.

**Task Details**

* **Mandatory Fields**:
  + **Title**: A brief title for the task.
  + **Task List**: A dropdown with the following options:
    - All (To handle collateral addition, send for valuation, answer for correction request, remark release-justification , remark release-verification, case termination, case follow-up with dashboard, report generation, escalation)
    - Collateral Addition Only (To add collaterals)
    - Case Follow (View role for follow up)
    - Report Generation
  + **Reason for Task Sharing**: Explanation of why the task is being shared.
  + **Task Assignment**: Assign tasks to selected RMs with an "Assign Task" button.
* **Task Status**: Track the status of each task using a dropdown with the following options:
  + New Task
  + Pending Task
  + Task in Progress
  + Task Completed
  + Task Terminated
* **Task Deadline**: A mandatory input field with a calendar for setting deadlines. An alert for overdue tasks or updates should be triggered.
* **Task Notification**: Notifications shall appear on the dashboard of selected RMs to inform them of task assignments or updates.
* **Comment Section**: A chat box for RMs to provide comments or justifications related to tasks.

**4. Task Handling Process**

1. **Case Registration**: The RM registers a case and adds collateral.
2. **Task Creation**: The RM selects Case and creates a task to share with other RMs.
3. **Task Assignment**: The RM assigns tasks to one or more RMs, specifying the task details, reason for sharing, and deadline.
4. **Task Notification**: Assigned RMs receive notifications on their dashboard.
5. **Task Management**: Assigned RMs manage their tasks, updating the status and adding comments as needed.
6. **Completion and Monitoring**: RMs monitor task progress and receive alerts for overdue tasks.

**5. Assumptions: -** All RMs involved are part of the same unit and can be selected for task sharing.

**6. Dependencies**

* The task management feature will depend on the proper functioning of the case registration and collateral management modules.