



Customer – Release 16 Notes



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## Don't validate form fields that are hidden by logic

Who needs to know this?

GoShift Admin users

Summary

With the addition of validation controls for fields released last sprint there was a bug occurring where hidden fields were still trying to validate. This has been fixed in this release.

## Consent Document Handling Process

Who needs to know this?

GoShift Admin Users, Customers, primarily integrated council users however all councils will have access to this feature/process.

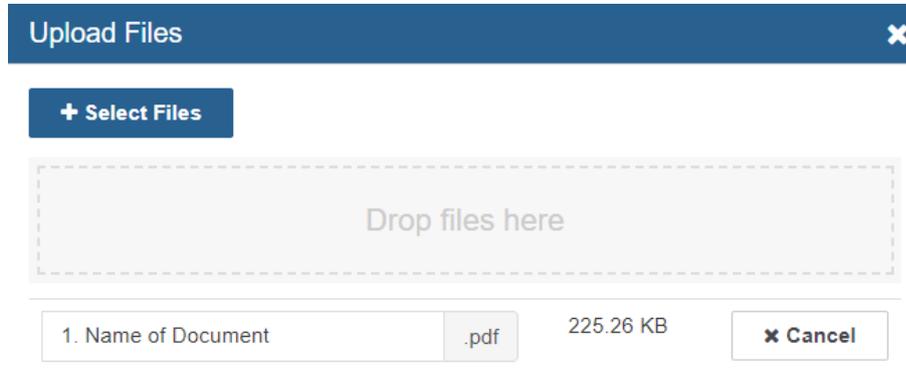
Summary

Consent documents now has a reason for upload, the reason for upload will appear when the consent is in the RFI stage. If the Consent is at the RFI stage, please select RFI attachment so that it is provided to the Council in the right format. The other option is provided throughout the Consent but must be vetted through the portal and approved before the document is sent to Council. This means that whenever a customer uploads a document to a 'consent' outside of the RFI process, this file will enter a pending state.

Councils will then vet it, choosing to either accept or reject the document. If the document is rejected, then the council user must provide a reason for the rejection. All documents uploaded in both the submission and consent stages that are uploaded to the submission/consent document list, must be supplied with a reason for upload. Both the upload and reject reasons are visible to relevant parties.

RFI Attachment

1. Select a document to upload and choose “RFI Attachment”, documents uploaded as an “RFI attachment” will be provided to the Council as part of the RFI response and not require additional checks to be completed.



Reason for Upload \*

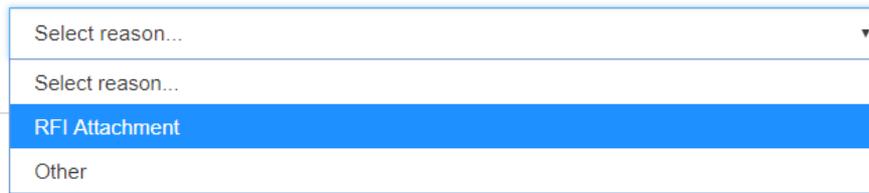


Figure 1 - Upload Reason RFI Attachment

Other

2. Select a document to upload and choose “Other”, documents uploaded as an “Other attachment” will enter a pending state and require an additional check by the Council.
3. The following message will be provided when uploading an “Other document”, although notifications will be provided to the Council it is recommended if you are uploading documents outside of the normal RFI process that you discuss with the Council prior to uploading if you are unsure of the current state of the consent i.e. if the processing is nearing completion and you want to provide supporting information for the application, it may mean delays in issuing the consent if additional processing is required.

When uploading a document outside of the RFI process it will automatically be put into a pending state, there is no guarantee that it will be accepted by the Council.

The Council will be notified that additional information has been uploaded but it may be rejected if the processing has already been completed or the information is insufficient. It is suggested that you discuss any additional information with the Council prior to uploading the document and provide a detailed summary of why the additional information is required.

### Upload Files ✕

[+ Select Files](#)

Drop files here

1. Name of Document	.pdf	225.26 KB	<a href="#">✕ Cancel</a>
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**Reason for Upload \***

Other ▼

When uploading a document outside of the RFI process it will automatically be put into a pending state, there is no guarantee that it will be accepted by the Council.

The Council will be notified that additional information has been uploaded but it may be rejected if the processing has already been completed or the information is insufficient. It is suggested that you discuss any additional information with the Council prior to uploading the document and provide a detailed summary of why the additional information is required.

**Reason for Upload \***

[Upload](#) [Cancel](#)

Figure 2 - Upload Reason Other documents

4. Enter a reason for the upload, the reason should provide enough information for the Council to understand why the extra information has been provided and if you have discussed with the Council there should be reference to the discussion.

- The document will enter a pending state and Councils will be provided a notification that additional documents have been uploaded. These can be viewed under the “Documents” tab within the application.

Pending Documents

Category	Document Name	Uploaded	Download
Consent Files	Events Calendar 2	Mon, 2 Jul 2018	 

Figure 2 - Council pending doc list

- The Council will either accept or reject the document/s being uploaded.

**Document File** ✕

**Category**

Consent Files

**Document Name \***

Events Calendar 2

**Reason for Upload \***

Was requested by council

**Associated Document**

Events Calendar 2

**Accept or Reject Document? \***

Accept  
 Reject

**Reason for Rejection \***

Cancel

Submit

Figure 3 - Council document upload view

- Once documents have been assessed by the Council they will be displayed under the “Documents” tab within the application.

#### Consent Documents

Category	Document Name	Status	Uploaded	Download
Consent Files	Events-Calendar-2	Rejected	Mon, 2 Jul 2018	
Consent Files	Live Chat Customer Chat	Pending	Mon, 2 Jul 2018	

Figure 4 - Customer view with differing statuses

- Customers can delete and replace documents that are in pending status, once the document/s have been reviewed by the Council the option to replace is no longer available.

Document File

*This file is in pending status and is awaiting council acceptance.  
You may still replace the associated file up until the file is accepted.*

**Category**

**Document Name**

**Reason for Upload**

**Associated Document**

Live Chat Customer Chat

**Replacement Document \***

 No file chosen

Figure 5 - Customer replace file

## Improve customer collaboration visibility

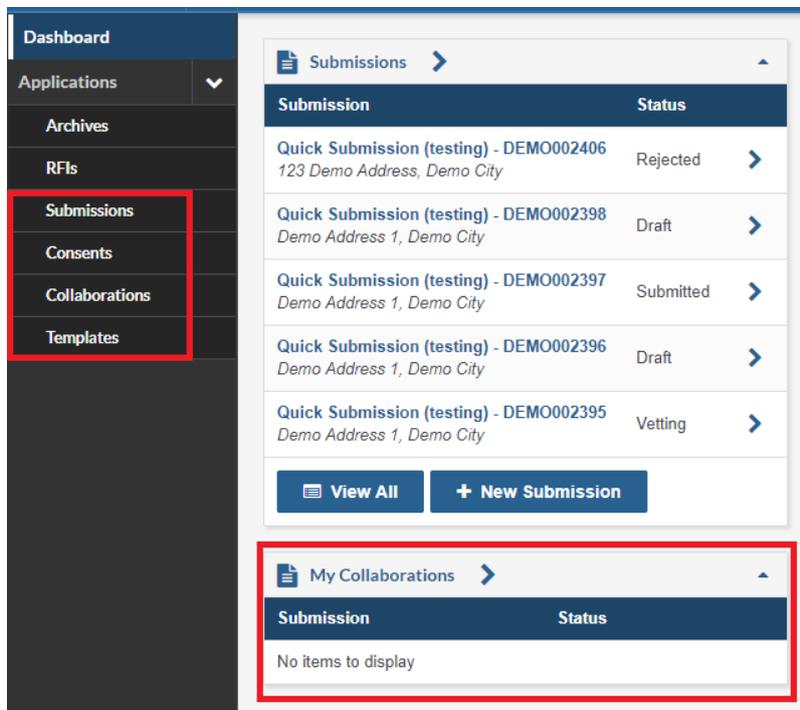
Who needs to know this?

Customers

### Summary

Customers have now been supplied with a collaborations widget which displays their 5 most recent collaborations.

Alongside the widget, different submission types have been split out into their own navigation bar headers making them all easier to find and navigate to.



The screenshot shows a web application interface. On the left is a dark sidebar with a 'Dashboard' header and an 'Applications' dropdown menu. The dropdown menu includes 'Archives', 'RFIs', 'Submissions', 'Consents', 'Collaborations', and 'Templates'. The 'Submissions' and 'Collaborations' items are highlighted with a red box. The main content area is divided into two sections. The top section is titled 'Submissions' and contains a table with the following data:

Submission	Status
Quick Submission (testing) - DEMO002406 <i>123 Demo Address, Demo City</i>	Rejected
Quick Submission (testing) - DEMO002398 <i>Demo Address 1, Demo City</i>	Draft
Quick Submission (testing) - DEMO002397 <i>Demo Address 1, Demo City</i>	Submitted
Quick Submission (testing) - DEMO002396 <i>Demo Address 1, Demo City</i>	Draft
Quick Submission (testing) - DEMO002395 <i>Demo Address 1, Demo City</i>	Vetting

Below the table are two buttons: 'View All' and '+ New Submission'. The bottom section is titled 'My Collaborations' and contains a table with the following data:

Submission	Status
No items to display	

The 'My Collaborations' section is also highlighted with a red box.

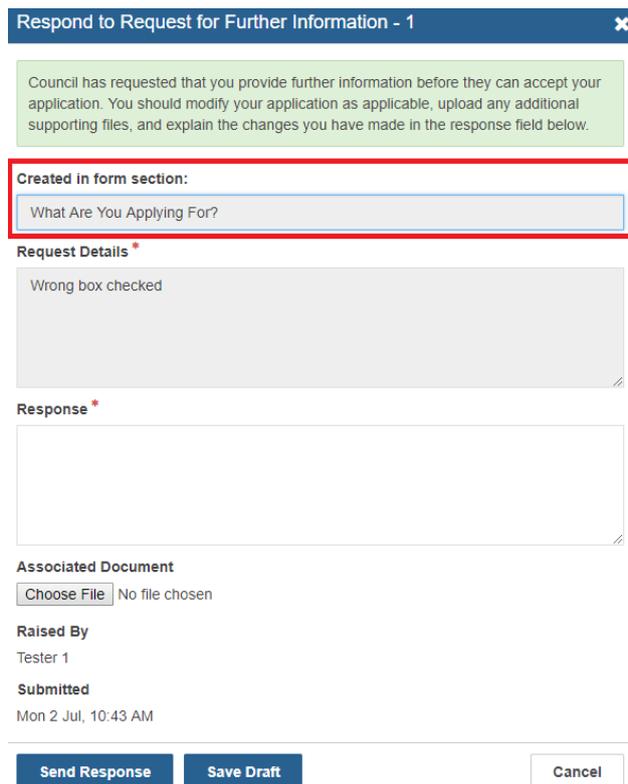
# Link SRFI to section vetting officer creates it in

Who needs to know this?

Council and customer users

## Summary

Whenever a SRFI is created in a specific section of the form by the vetting officer, the SRFI will contain details of the section that it was created in.



**Respond to Request for Further Information - 1** ✕

Council has requested that you provide further information before they can accept your application. You should modify your application as applicable, upload any additional supporting files, and explain the changes you have made in the response field below.

**Created in form section:**

What Are You Applying For?

**Request Details \***

Wrong box checked

**Response \***

**Associated Document**

No file chosen

**Raised By**

Tester 1

**Submitted**

Mon 2 Jul, 10:43 AM

Figure 6 - Customer view of SRFI