Software Requirements Specification (SRS)
Admin UI-Traveler Profile Create/Modify

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1. **Document Revisions**

Date	Version Number	Document Details	SRS by
06Jan2025	V1.0	New	Nikhil Shetwe

2. **Project Approvals**

Role	Name	Date
BRS by		
BRS Approved by		
SRS Approved By		

3. **Project Stakeholders**

Role	Name	Department
Primary Stakeholder		
Secondary Stakeholder		
Escalation		
UX Manager	Rahul Bhilare	
Developer		
Document Author	Nikhil Shetwe	
Test Designed by		
Test Executed by		

1. Requirement Name

Traveller profile create/ modify from admin UI

2. Priority

High

3. Description & Basic Flow

3.1. Introduction of Business Requirement

The purpose of this business requirement is to define the necessary functionality for creating and modifying traveller profiles from the Admin User Interface (UI) of the system.

3.2. Scope

- Create Traveller profile- Employee/ Guest on UI.
- Email ID validation.
- Maker checker flow for create and modify traveller profile
- Existing and new traveller profile search/ view/ modify on root level.
- Search traveller under the group/ company.
- Audit trail

3.3. Out of Scope

- If the Traveller profiles are updated daily via an SFTP cron job that runs at a specified time, any manual changes made to the traveller profiles through the UI are overwritten after the cron job runs, as the system pulls the data from the SFTP file.

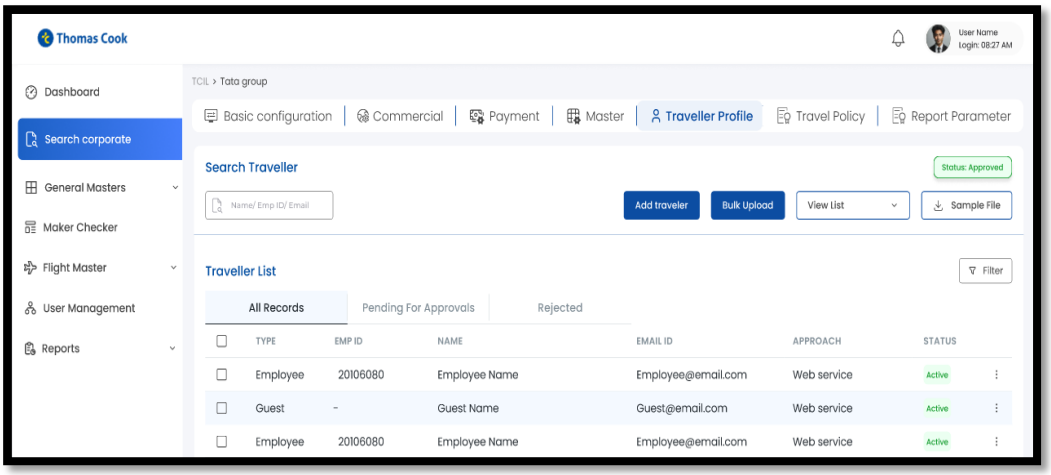
4. Requirements

4.1 Functional Requirements

4.1.1 Create Traveller profile- Employee/ Guest on UI

- On clicking ‘Traveller Profile’ tab of group/ company configuration > TravelOne shall provide ‘Add Traveller ‘button.

- User shall click on ‘Add Traveller ‘button.

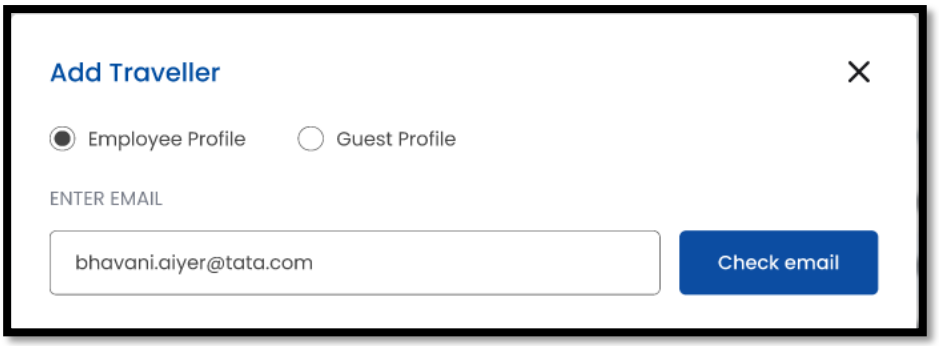


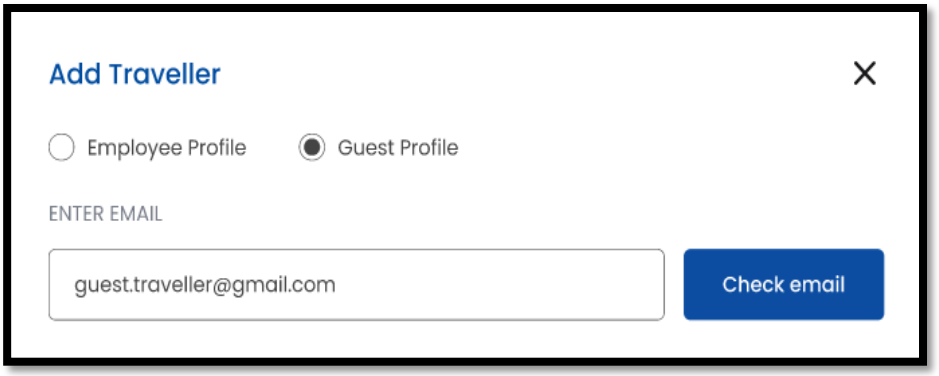
- Post clicking ‘Add Traveller’ button, a popup window shall appear asking the user to choose between creating a traveller profile for an **employee Profile** or **guest Profile.**

Labels	Dropdown/Text box	Source	Value	Value Length	M/O	Remarks
Employee Profile	Radio Button	Hard code	-	NA	1. Default no selection. 2. Either one shall be mandatory.	-
Guest Profile	Radio Button	Hard code	-	NA		-
ENTER EMAIL	Text Box	User entry	Free text with email format	Max 255	M	-
Check email	Action Button	Hard code	-	-	M	Refer Email ID validation

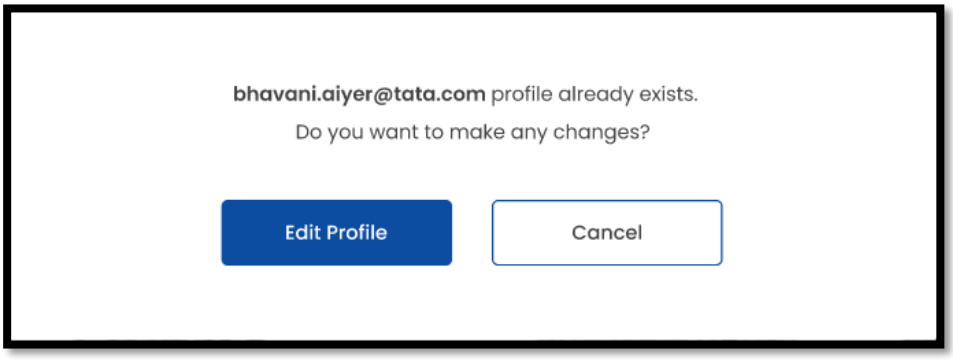
4.1.2 Email ID validation

- On Pop up of ‘Add Traveller’, Post selecting **Employee Profile** or **Guest Profile.** User shall enter email ID to validate whether the entered email ID is already associated with an existing traveller profile in the system (in a group, company).





- If an existing profile is found under same group or company, the system will display a message notifying the user that the profile already exists and ask if they 'Do want to make any changes?' in the existing profile.



- Validation for Edit Profile and Cancel button

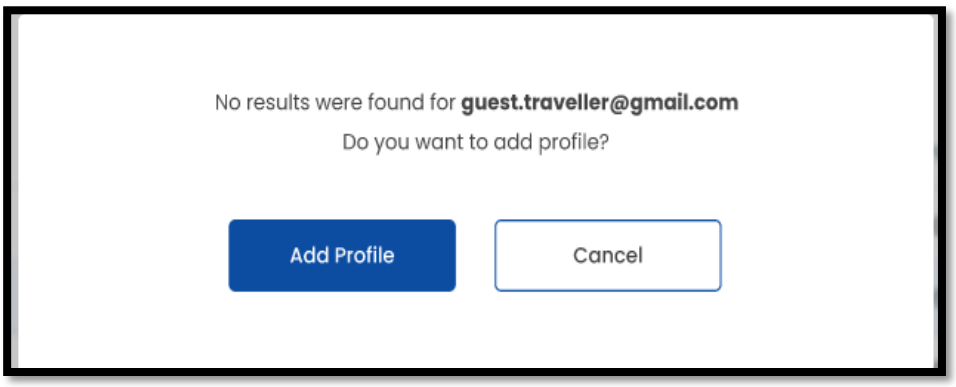
Labels	Dropdown/Text box	Source	Value	Value Length	M/O	Remarks
Add Profile	Action button	Hard code	-	NA	-	Will navigate to add profile form
Cancel	Action button	Hard code	-	NA	-	Close the pop-up window

- If the entered email not found under same group or company but under any other group or company, System shall display below message.

Bhavani.aiyer@tata.com profile exists in different group/company Cancel

Labels	Dropdown/Text box	Source	Value	Value Length	M/O	Remarks
Cancel	Action button	Hard code	-	NA	-	Close the pop-up window

- If no profile is found, the system will display a message informing the user that 'No results found for "entered email id' and prompt them 'Do you want to add a profile?'
  Note: Do not refer message from figma, refer SRS message.

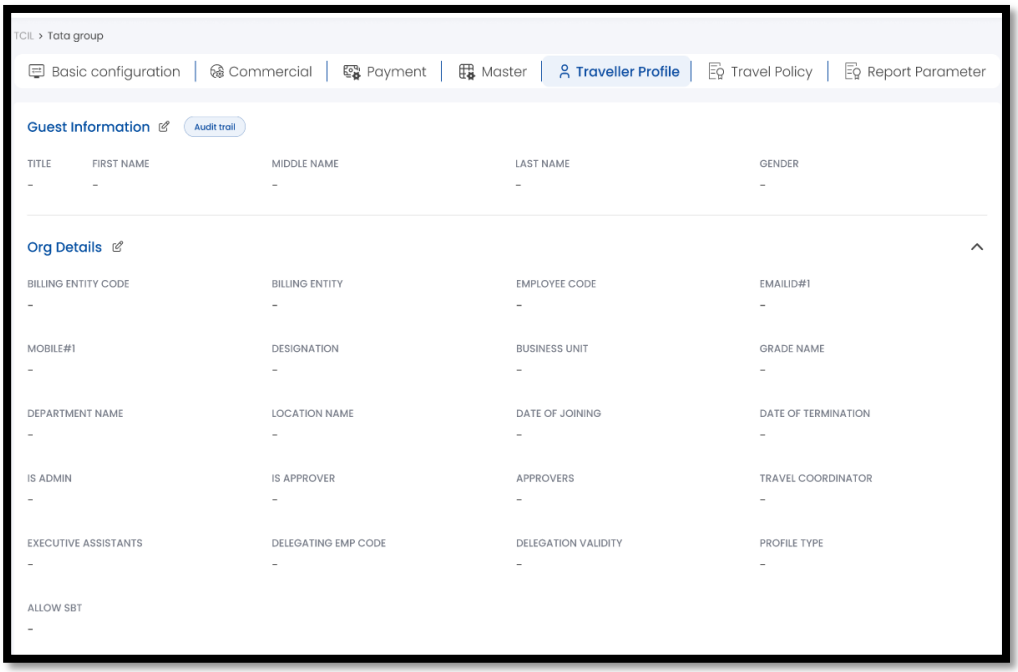


- Validation for Add profile and Cancel button

Labels	Dropdown/Text box	Source	Value	Value Length	M/O	Remarks
Edit Profile	Action button	Hard code	-	NA	-	System will search and view the existing traveller profile to edit
Cancel	Action button	Hard code	-	NA	-	Close the pop-up window

Traveller Profile of for new employee/ guest form and validations

- Traveller profile for new employee/ guest creation form:



Please refer below file for field validation of Admin UI form:
TravellerProfile_DataFields_UI

- Traveller profiles created through the Admin UI adhere to the configurations set in the Basic Configuration. Such as Allow Traveller Profile Sharing, Allow Cross Company Billing, who can edit TP, etc.
- Post adding data in the traveller profile form of employee / guest, user will submit the form.

Note:

a. T1 Standard mandatory Fields for ‘employee’ as below:

I. TITLE
II. FIRST NAME
III. LAST NAME
IV. MOBILE
V. STATUS
VI. PROFILE SET AT
VII. PROFILE TYPE
VIII. BILLING ENTITY CODE
IX. EMPLOYEE CODE
X. EMAILID

b. T1 Standard mandatory Fields for ‘guest’ as below:

XI. TITLE
XII. FIRST NAME
XIII. LAST NAME
XIV. MOBILE
XV. STATUS
XVI. PROFILE SET AT
XVII. PROFILE TYPE
XVIII. EMAILID

c. T1 Standard mandatory Fields for ‘Travel coordinator’ as below:

XIX. TITLE
XX. FIRST NAME
XXI. LAST NAME
XXII. MOBILE
XXIII. STATUS
XXIV. PROFILE SET AT
XXV. PROFILE TYPE
XXVI. BILLING ENTITY CODE
XXVII. EMPLOYEE CODE
XXVIII. EMAILID

c. Corporate Specific mandatory fields

- In addition to predefined fields (a and b fields) given above, the admin should be able to add custom fields as needed. These custom fields can be defined by the corporate, and the admin will have the ability to set these fields as mandatory.

- The system shall allow an admin to define mandatory fields in 'Profile mandatory' field for the traveller profile. These mandatory fields will be used across all traveller profiles to ensure that essential data is captured during profile creation or modification.
- Travel co-ordinator will be assigned to the traveller post creation traveller profile. In bulk-upload traveller coordinator will be assigned only if Travel Coordinator field value is YES while profile creation. Otherwise, upload should not update the field if field value is NO

d. EMAILID field shall not be available for edit. Only superadmin will have access to edit email id.
e. If additional records or documents need to be updated, they must be manually entered via the Admin UI by admin. This applies to documents such as FFN, Loyalty numbers for hotels, car details, visa details, and passport details.

Validation for Submit:

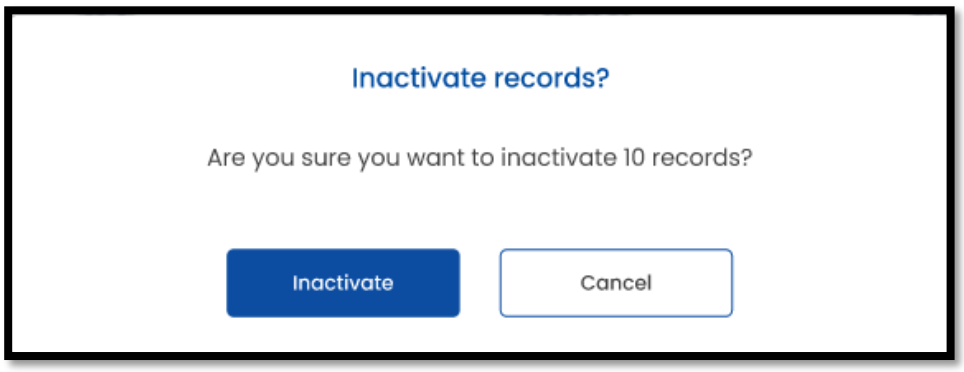
- All the mandatory fields should be highlighted with asterisk (*) symbol in red colour.
- System must ensure that all mandatory fields in the traveller profile creation form are filled out before the user can submit the form.
- If any mandatory field is left blank or is incorrectly filled, the system will prevent form submission and display an appropriate error message to guide the user in completing the form correctly.
- Traveller profiles can be created via multiple methods: SFTP file upload, API, or UI. If a profile is created via SFTP or API, mandatory fields (such as name, contact information, etc.) might be left blank. If a user tries to edit and save such a profile via the UI, the system must detect missing mandatory fields and display an error.
- In this case, User must follow the same method as the original creation process (e.g., SFTP or API).

4.1.3 Maker checker flow for create and edit traveller profile

- Create traveller profile: On clicking submit button of the form. In the corporate configuration>> Basic configuration, the maker-checker flow can be enabled or disabled based on the maker checker field in corporate configuration>> basic configuration. If the field is enabled, the maker-checker flow will be conducted. If

the field is disabled, the maker-checker flow will not be enforced, allowing submission without the additional review steps.

- Edit traveller profile: For the modification of the traveller profile fields as well as modification in the status of traveller profile (activate/ deactivate), maker check flow shall be applicable for approval / rejection based on the maker checker field in corporate configuration>> basic configuration.
- When an edit traveller profile request is submitted for approval, the profile should be locked for further modifications until the request is either approved or rejected. The profile should be locked for further edits until the previous request is either approved or rejected.
    - In Search Traveller page, on selecting all active records – Number of the selected records shall be displayed followed by button 'Mark as Inactive'.
    - On clicking 'Mark as Inactive' button, Pop up will be displayed as follows
    -



Field Validation:

Labels	Dropdown/Text box	Source	Value	Value Length	M/O	Remarks
Inactivate	Action button	Hard code	-	NA	-	Will show toaster Records submitted successfully
Cancel	Action button	Hard code	-	NA	-	Close the pop-up window

- On selecting all inactive records- Number of the selected records shall be displayed followed by button 'Mark as active' below field validation should be followed:

Labels	Dropdown/Text box	Source	Value	Value Length	M/O	Remarks
Activate	Action button	Hard code	-	NA	-	Will show toaster Records submitted successfully
Cancel	Action button	Hard code	-	NA	-	Close the pop-up window

- On selecting both active and inactive records – Number of the records shall be displayed without displaying button to take any action.

- When a new traveller profile is added, an email will be triggered to notify the maker about the submission for approval. Additionally, the approver will receive an approval request email. The email triggering process will be defined and configurable within communication configuration of the corporate.
- Once the approver (checker) approves a newly submitted traveller profile, the system will automatically send a notification email to the email address mentioned in the traveler profile. The email will notify the traveller that their profile
- Mail shall be triggered to the employee on the basis on value of TP Registration Email field in basic configuration.
- This will be not applicable for the guest traveller profile creation, only details of the guest will be stored in database and will be used to validate the email ID.

4.1.4 Existing and new traveller profile search/ view on root level.

- **Global Search under group and company:**
  - The system will allow users to search for traveller profiles based on specific search parameters, including name, email ID, and employee ID. The search can be performed within a specific group or company to narrow down the results.

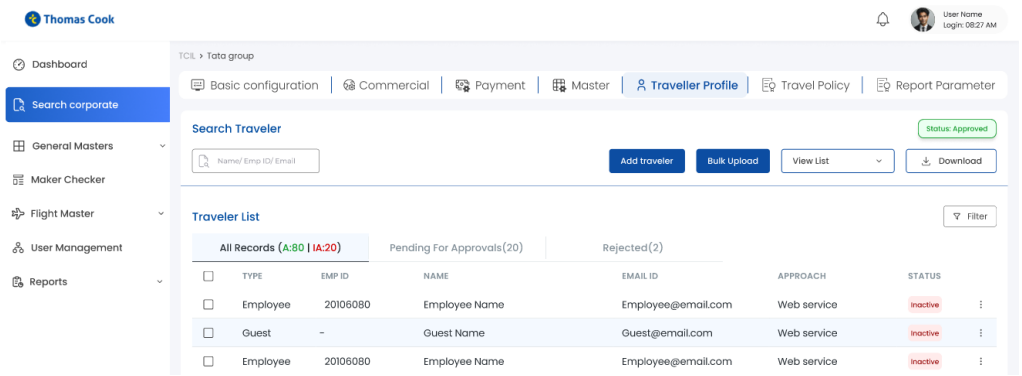
- **Employee search:**
  - The system shall support Group-level and Company-level employee search functionality for employee under the specific group and company.

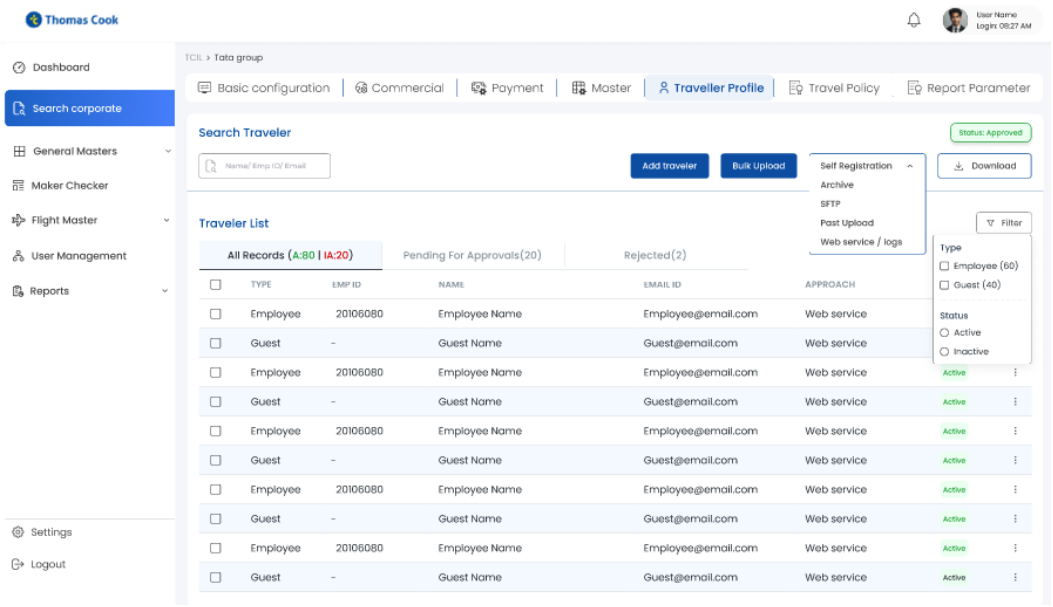
- When searching for a traveller profile, the system will only show profiles that belong to the specific group or company. This ensures that the search results are filtered to only show profiles relevant to the selected group or company.

- **Guest search:**
  - The system shall support Group-level and Company-level guest search functionality for guest
  - When searching for a traveller profile associated with a guest, the system will filter and display only the guest profiles that belong to the selected Group or Company.
  - This ensures that search results are restricted to profiles relevant to the specified group or company, preventing the display of profiles from other groups or companies.

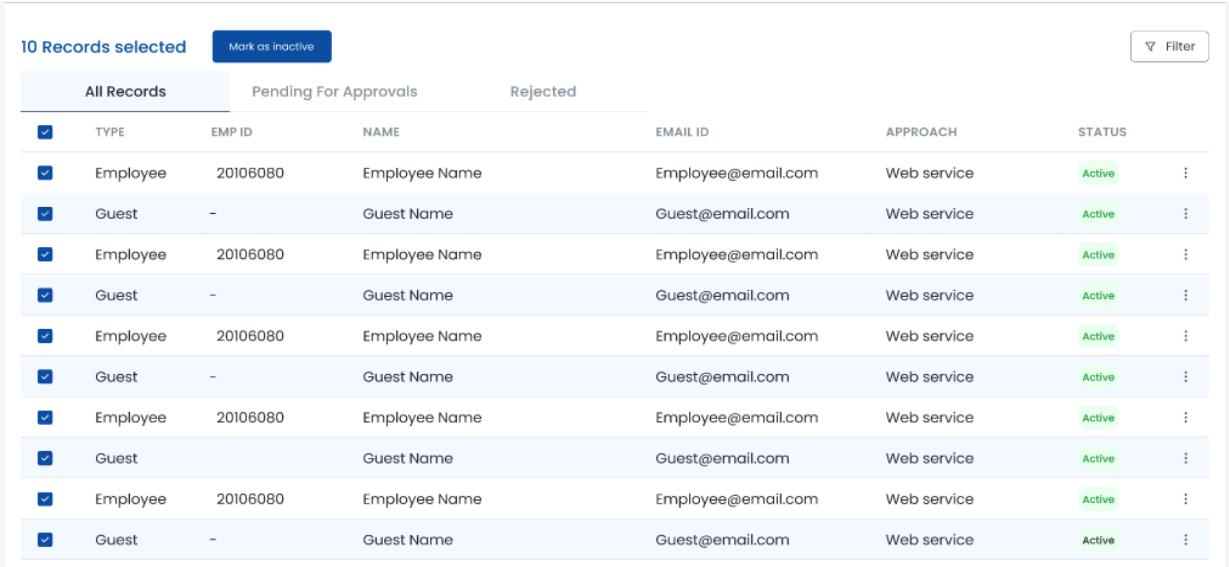
4.1.5 Search traveller under the group/ company.

- **Filters:**
  - The system shall allow users to filter (Active/ Inactive and employee/guest) and view (self-registration, SFTP, etc) traveller profiles based on parameters in drop down. This functionality will help users easily navigate through large sets of profiles and quickly find the profiles they are interested in.





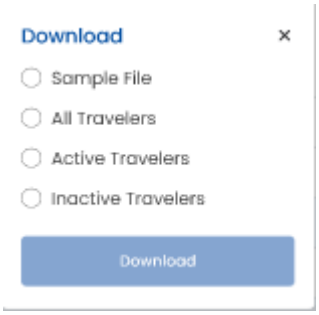
- **Traveller Profile records sorting:**
    - When displaying traveller profiles, the system will prioritize **active** records by displaying them at the top of the profile list, followed by **inactive** records.
    - The system shall prioritize displaying traveller profiles based on their latest creation or modification. The **latest created** or **modified records** will be shown at the top of the profile list. After these records, **inactive modified records** will follow.
    - ‘Select All’ check box- If the user clicks the **"Select All" checkbox**, all records visible on the current page will be selected automatically. This selection will apply only to the records visible on the current page, and the user can deselect individual records if needed. For selecting a specific record, the user can click the checkbox against the record they wish to select.
    - The selected records will remain selected across page navigations and interactions, and the selections will persist until the user takes an action (Activate/ Inactivate) on the selected records.



- Traveller List will be displayed in Three tabs as below:
    1. All Records (with count- Active/ Inactive): Both active and inactive records.
    2. Pending For Approvals (with count): All the records pending for modification action by the approver.
    3. Archive records: all archive records shall be visible with the count on the tab.

  (Note: Pending for approval traveller profile will not be available in all records. Such profile will not be available for emulation on portal)

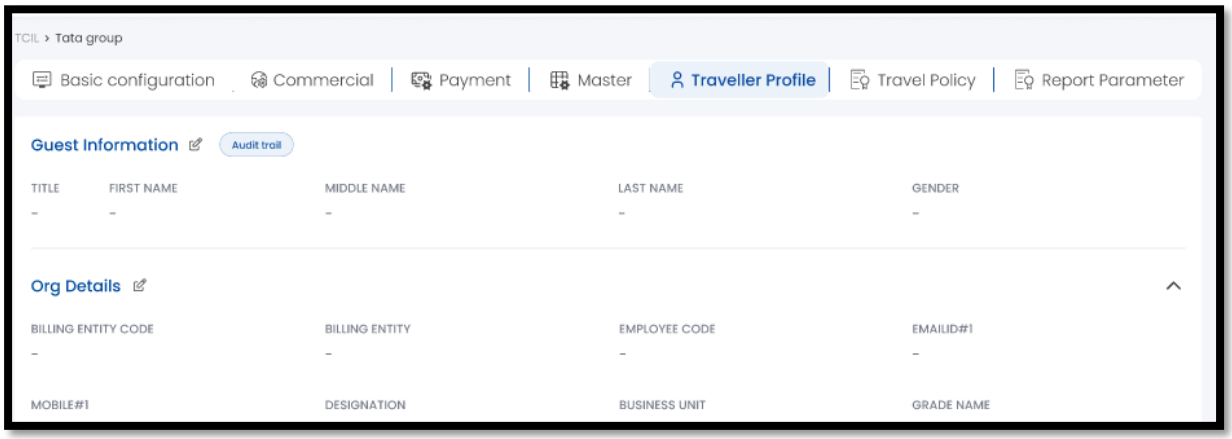
- Traveler profile dataset download
    - In traveller profile, admin shall have download button to download the dataset of the traveller profile.
    - On click download button, Pop-up shall display with options as below:



- User shall be able to download Sample file for bulk upload, all travellers of the corporate, Active and inactive traveller profile data dump by selecting any one option and clicking on download button.

4.1.6 Audit trail

The system must maintain an audit trail to log all creation and modification activities related to traveller profiles for both employees and guests. This ensures traceability, accountability, and compliance with data management and security standards.



4.2 Non-Functional Requirements

- When the user clicks the **Check Email** button on the pop-up, the system will validate whether the entered email address exists in the **traveller profile database**. The system will perform a check in the database and provide feedback to the user based on whether the email is associated with an existing traveller profile.

4.4 Business Rules/Validations

4.3 Assumptions

NA

4.4 Dependencies

NA

4.5 Risks

NA

4.6 Testing Scenarios

Admin UI-Traveler Profile Test Scenarios