

Duplicate Rule - Setup New flow (Web) (Enhancement)

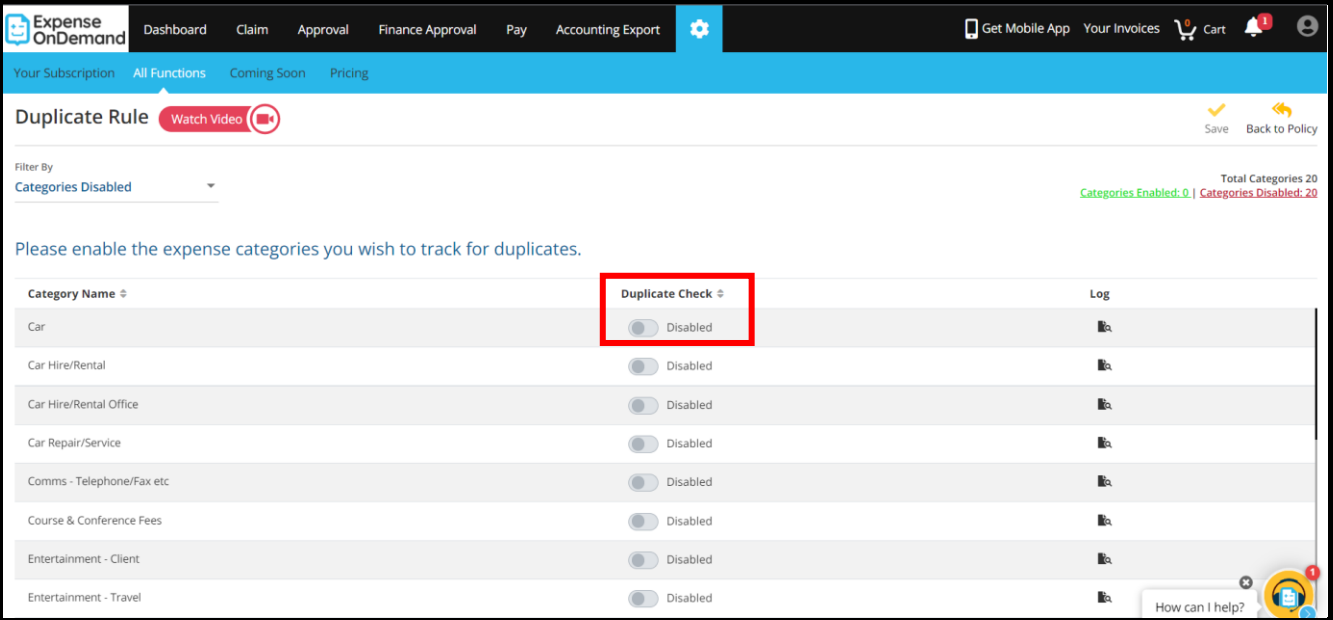
1 Business Requirement

1. The Duplicate Rule Business requirements are:
 - a. The Current flow only allows the user to do an ACTION ON GRID using toggle. The standard behaviour of the application is to avoid action on grid.
 - b. The page refreshes with every toggle action and user is taken to new filter, hence the UX becomes confusing. The user should be able to enable and disable without moving away.
 - c. The default filter is 'Categories disabled', hence the user always lands on screen where the duplicate check is disabled although user has enabled some earlier. The user should always land on All filter
 - d. The Standard behaviour of the application is to take any action from the panel.
 - e. The log should be captured for each category about duplicate check action.
 - f. This document will cover the current flow and the proposed flow.
 - g. This enhancement does not have any impact on mobile or any other functions on web.
 - h. The New name of the function will be Duplicate Checker Policy

2 Duplicate Rule: Current Setup flow - Web

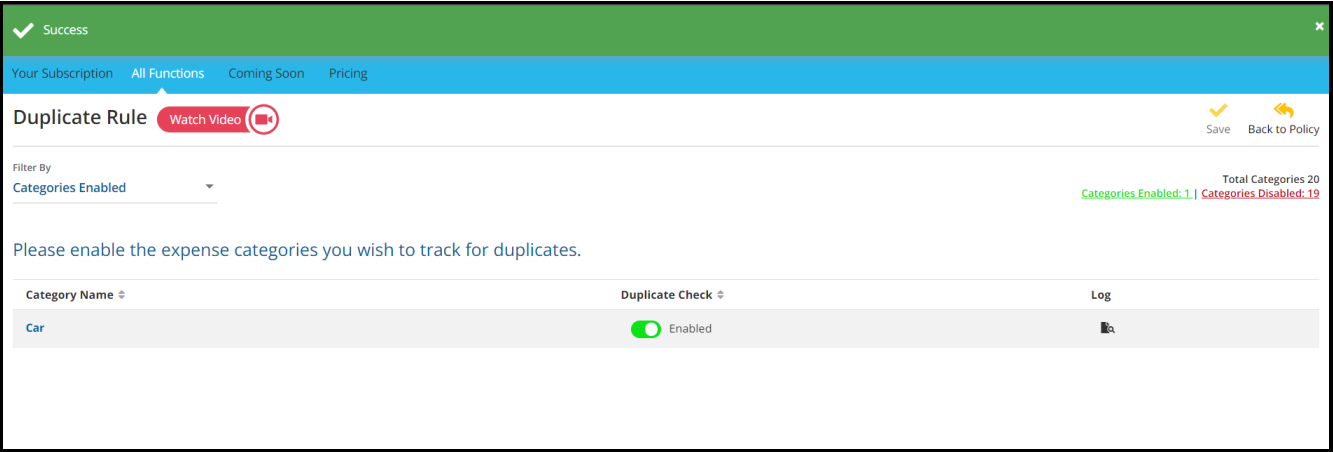
- 1. The Duplicate rule current flow (Screen 1) allows the FM to enable the toggle button under Duplicate Check column for respective category.

Screen 1



- 2. Once Enabled the FM need to click on **Save** to save the changes.
- 3. After saving the grid with filter “Categories Enabled” is displayed, where the category with Duplicate check ENABLED is only displayed.

Screen 2



- 4. FM need to select the filter ‘Categories disabled’ again to add more categories for Duplicate check.
- 5. **Problem Statement:**
 - a. The Current flow only allows the user to do an ACTION ON GRID using toggle.
 - b. The page refreshes with every toggle action and user is taken to new filter, hence the UX becomes confusing.
 - c. The default filter is categories disabled, hence the user always lands on screen where the duplicate check is disabled although user has enabled some earlier

3 Duplicate Rule: Proposed Setup flow - Web

1. The New name of the function will be Duplicate Checker Policy
2. The New screen will show the following columns on the setting screen:
 - a. **Category Name:**
 - b. **Duplicate Check**
 - c. **Log**
3. The **Category Name** column will display the Active categories fetched from Expense Category function. The Duplicate check field will show the text '**Duplicate Check ON/ Duplicate Check OFF**' based on the setup done by the FM.
4. **Filter By** drop down on the header should have these three options: **All, Duplicate Check ON, Duplicate Check OFF**. By default, **All** will be selected as default filter and grid will be displayed based on the same.
5. The new screen (**Screen 3**) will not have the toggle button on the grid.

Screen 3

Expense OnDemand | Dashboard | Expenses | Advances | Approvals | Settings

Organisation Settings | My Settings

Duplicate Checker Policy

Filter By: All

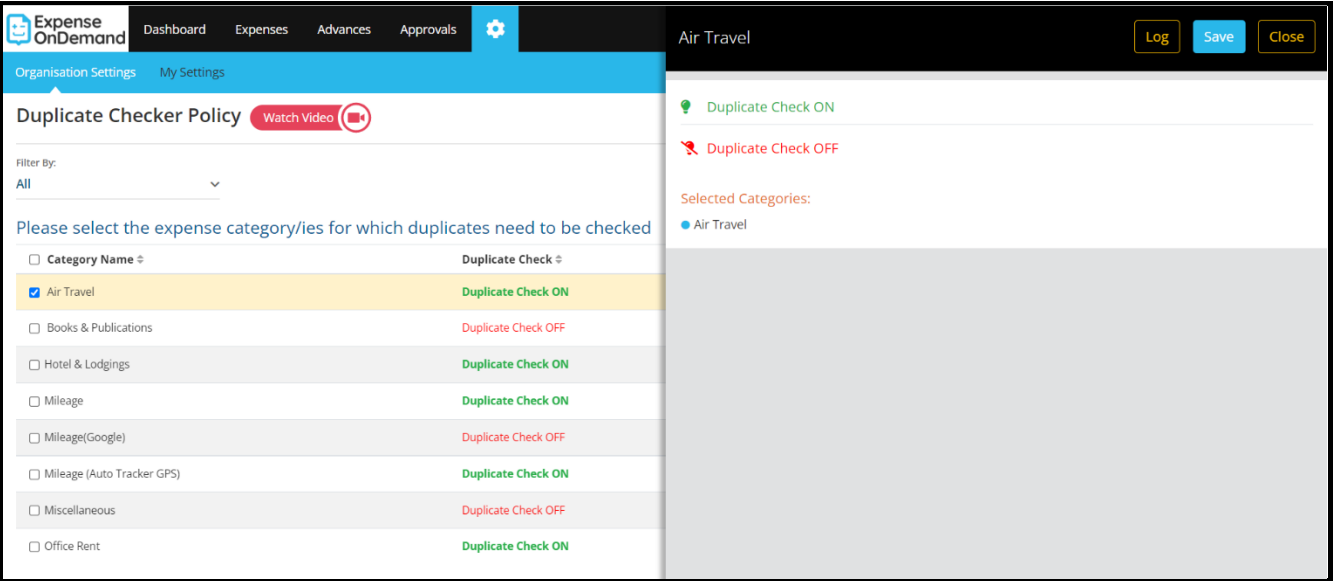
Total Categories: 08
All: 08 | Categories Turned On: 05 | Categories Still Off: 03

Please select the expense category/ies for which duplicates need to be checked

Category Name	Duplicate Check	Log
<input type="checkbox"/> Air Travel	Duplicate Check ON	
<input type="checkbox"/> Books & Publications	Duplicate Check ON	
<input type="checkbox"/> Hotel & Lodgings	Duplicate Check ON	
<input type="checkbox"/> Mileage	Duplicate Check ON	
<input type="checkbox"/> Mileage(Google)	Duplicate Check ON	
<input type="checkbox"/> Mileage (Auto Tracker GPS)	Duplicate Check ON	
<input type="checkbox"/> Miscellaneous	Duplicate Check OFF	
<input type="checkbox"/> Office Rent	Duplicate Check ON	

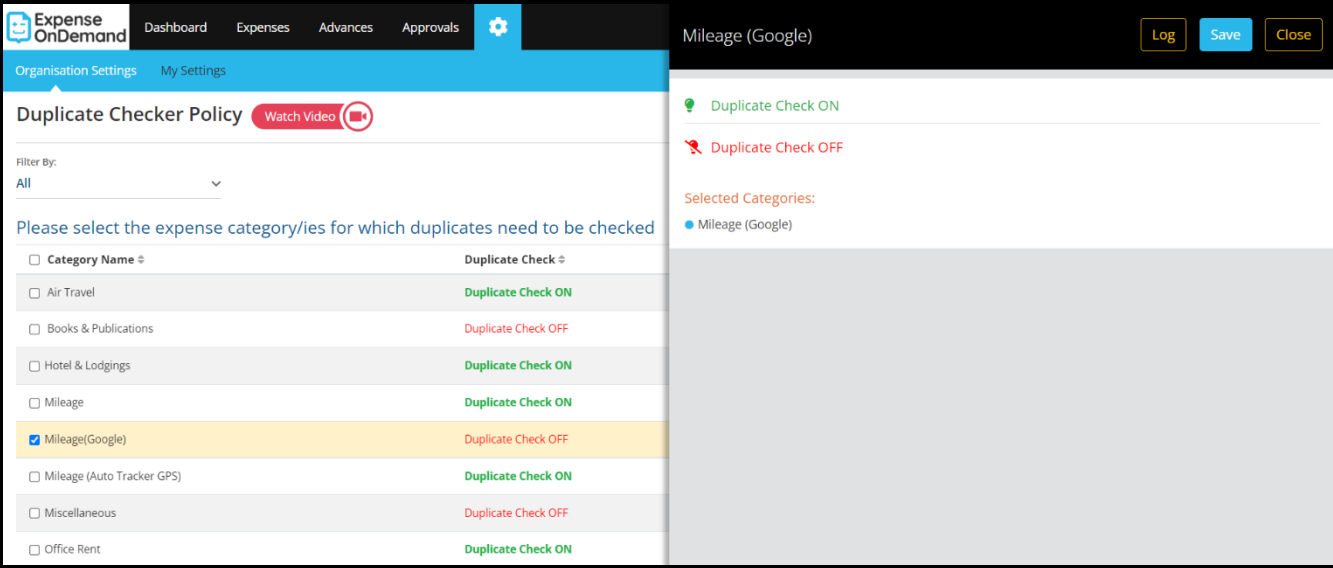
6. On clicking on the single checkbox (**Duplicate Check ON**) new screen (**Screen 4**) will open with the **Duplicate Check ON, Duplicate Check OFF, Log, Save** and **Close** button and selected Category.

Screen 4



- 6. The Duplicate check will also have log for each category (Active) which will show details of any action done on the category with respect to duplicate check. The log will show the action performed as **Duplicate Check ON / Duplicate Check OFF**, with additional information for ‘By who’ and ‘when’ this change was made.
- 7. On clicking on the single checkbox (**Duplicate Check OFF**) new screen (**Screen 5**) will open with the **Duplicate Check ON, Duplicate Check OFF**, Log, Save and Close button and selected Category.

Screen 5



- 8. On selecting multiple categories, new screen (**Screen 6**) will open with the “Bulk Selection (Number of categories selected) **Duplicate Check ON, Duplicate Check OFF**, Save, Close, Log (disabled) button and selected Categories.

Screen 6

Expense OnDemand

DashboardExpensesAdvancesApprovals

Organisation SettingsMy Settings

Duplicate Checker Policy

Watch Video

Filter By:
All

Please select the expense category/ies for which duplicates need to be checked

Category Name	Duplicate Check
<input checked="" type="checkbox"/> Air Travel	Duplicate Check ON
<input checked="" type="checkbox"/> Books & Publications	Duplicate Check OFF
<input type="checkbox"/> Hotel & Lodgings	Duplicate Check ON
<input type="checkbox"/> Mileage	Duplicate Check ON
<input checked="" type="checkbox"/> Mileage(Google)	Duplicate Check OFF
<input type="checkbox"/> Mileage (Auto Tracker GPS)	Duplicate Check ON
<input type="checkbox"/> Miscellaneous	Duplicate Check OFF
<input type="checkbox"/> Office Rent	Duplicate Check ON

Bulk Action - (3 Selected)

LogSaveClose

Duplicate Check ON

Duplicate Check OFF

Selected Categories:

- Air Travel
- Books & Publications
- Mileage (Google)

9. Please note, the LOG will only capture for categories whose Duplicate check status is being changed/updated, meaning if for Air Travel the Duplicate check is turned ON and FM again selects (in single or in bulk) and selects turn ON again then the LOG will not capture the action for Air travel since it was already Turned ON.

4 Impact(s):

1. There is no impact for this enhancement on other functions.
2. The historical expenses should stay as it is.
3. The new name should reflect at Pricing on app and website, Function box on organisation setting, Function detail text and Function setup.