

**Manage Employee – New Import (Web)
(Enhancement)**

1 Business Requirement

1. The Manage Employee – New (Universal) Import will change so that when the FM imports employees, their Cost Centres and their Grades, SMB automatically creates the cost Centres and the Grades.
2. Hence, the requirements are:
 - a. The Manage Employee should offer the new Import flow being used in Universal import.
 - b. It should also offer extreme flexibility in terms of the data it imports.
 - c. **Hence, AT A MINIMUM, THE EMPLOYEE FIRST NAME AND EMAIL SHOULD BE MANDATORY.** The rest is not mandatory, and can be imported subsequently.
 - d. The FM should be able to reimport the same record more than once, and this should not create duplicate records.
 - e. The FM can first import the employees, then the Approvers, then the Cost Centres and then the Grades. In each import the new data should be imported, and the re-imported data should not create any duplicates.
 - f. Hence, after importing employees and their Approvers, the FM (say) imports the Cost Centres. If the same employees are imported again, but the cost centres are imported for the first time, then the application should not create any duplicate employees. Instead, it should create the Cost Centres and assign Employees (Claimants) to them.
 - g. No Role can be changed through this import. For making changes to a Role or removing a Cost Centre or re-assigning a Claimant to another Cost Centre or Grade or moving Claimants to another Approver, and all such actions, these need to be done from within the application from the appropriate functional area. For example, if the Approver of ne of more Claimants need to be changed, then these need to be done from the Assign Approver function, and so on.
 - h. The import should be smooth.
 - i. Logs should be maintained.
 - j. The employee piece in the Universal import should be re used.
 - k. **The approver detail, grade and cost centre detail(s) imported will be created in the system if it does not exist, but it cannot be updated.** This is done because for some subscription (e.g. City University) the expense will also move if Approver or Cost centre is updated) which will make this a LONG job.
 - l. For the Cost centre to be created automatically, the Cost Centre function must be subscribed. Hence, as soon as the import file is uploaded, and the FM selects the Cost centre name and code field mapping, the application needs to Open a panel to tell the FM that they must subscribe to the Cost Centre function to be able to assign Claimants to the Cost Centre. The Cost Centre function purchase should be invoked here.

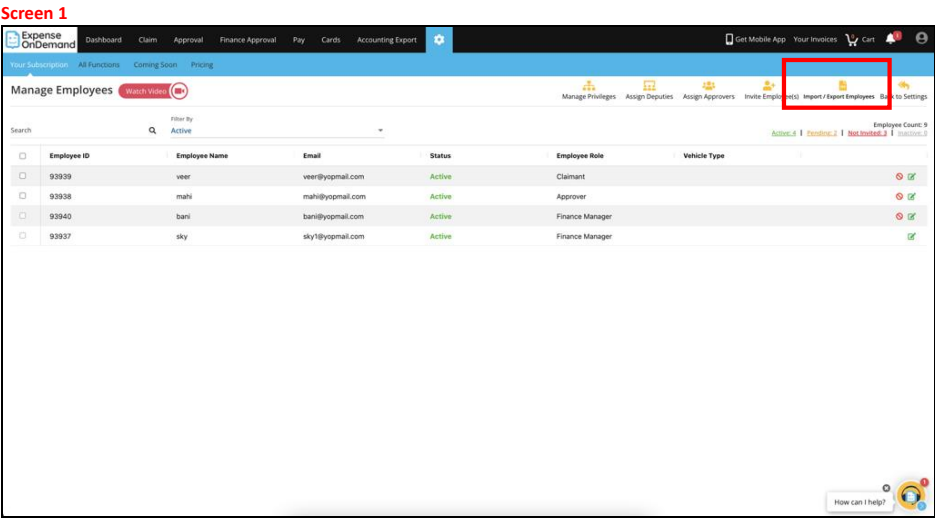
Commented [AS1]: RETHINK:
Ideally it should allow to update.

Commented [GU2R1]: It should be update also

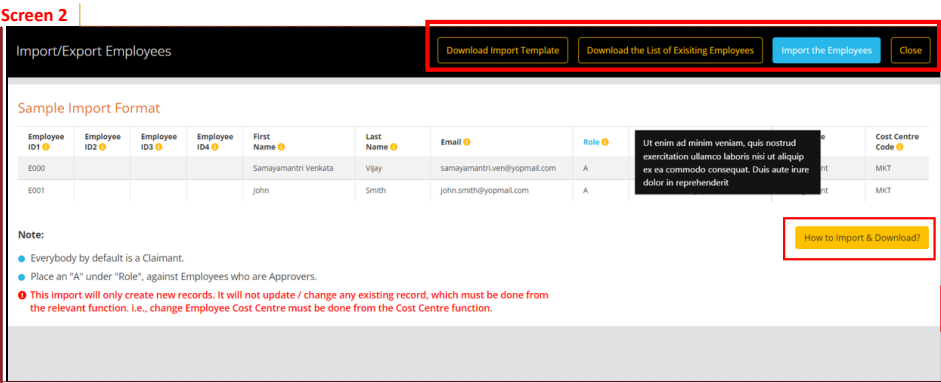
Commented [AS3R1]: 1st progress demo:
See how it is working and then decide if this point should be

2 Manage Employee

- 1. The **Manage Employee** screen will show the **Import/Export Employees** button (Screen 1). This will be displayed to both the existing and new users



- 2. Clicking on the button **Import/Export Employees**, the FM will be displayed a panel with Sample of the Import file with Note and header having following three options (Screen 2):
 - a. **Download the Import Template**
 - b. **Download the List of Existing Employee in your subscription**
 - c. **Import the Employees**



Commented [GU4]: Why we are showing "Sample Import Format" in grid? it will not looks good and also scroller will come in ag-grid

Also, Panel is too long, we should think to create this panel as generic for all import.

Commented [AS5R4]: 1st progress demo – review this for scroll and areas which we can shorten

Commented [AS6R4]: Use different overlay, something which can point to the info icon

Commented [AS7R4]:

- 3. The Panel will show the grid with info icon with each column which on hover will give message "This is optional field" or "This is Mandatory field" based on the column name they are hovering.
- 4. On clicking upon the **Download the Import Template**, the user will have the excel file downloaded as shown below (Screen 2). This file will have 10 sample records as shown including 3 approvers which the FM can see , remove and add their org detail into.

Screen 3

	A	B	C	D	E	F	G	H	I
1	Employee ID1	Employee ID2	Employee ID3	Employee ID4	First Name	Last Name	Email	Role	Approver Email
2	<Sample>	<Sample>	<Sample>	<Sample>	<Sample>	<Sample>	<Sample>	<Sample>	<Sample>
3	E001				John	Doe	jonn.doe@email.com	A	jonn.doe@email.com
4	E002				Daisy	Potts	daisy.potts@email.com		jonn.doe@email.com
5	E003				Eli	Sewell	Eli.sewell@email.com	A	Eli.sewell@email.com
6	E004				Silky	Jones	Silky.jones@email.com		Eli.sewell@email.com
7	E005				Shane	Miles	Shane.miles@email.com		Eli.sewell@email.com
8	E006				Vijay	Sharma	Vijay.sharma@email.com		Eli.sewell@email.com
9	E007				Javed	Ali	Javed.ali@email.com		Sachin.singh@email.com
10	E008				Andrew	Cole	Andrew.cole@email.com		Sachin.singh@email.com
11	E009				Sachin	Singh	Sachin.singh@email.com	A	Sachin.singh@email.com
12	E010				Mia	Randall	Mia.randall@email.com		Eli.sewell@email.com

5. On clicking upon the **Download the List of Existing Employee in your subscription** the above file with list of all employees and their respective data will be downloaded. This is already implemented.
6. On clicking upon the **How to Import and Download** the FM will be displayed a panel with following instructions:

a. Click the Download Import Template to download the file format.

b. Enter the details required to import

c. Review the details entered in your MS Excel

d. Import the file into ExpenseOnDemand.

e. The imported Employees will be saved under “Not Invites” Status.

f. Use the button “Download the list of Existing Employees” to export all Employees in your subscription.

Screen 4

Expense OnDemand

My Subscription

Manage Emp

Enter search criterion

☐ Employee ID

☐ OR

☐ OR

☐ OR

☐ OR

☐ OR

Import/Export Employees

Sample Import Format

Employee ID1	Employee ID2	Employee ID3	Employee ID4	First Name	Last Name
E002				Sandhyaarani	Weslata
E001				John	Smith

Note:

Everybody by default is a Claimant.

Place an "A" under "Role", against Employees who are Approvers.

This import will only create new records. It will not update / change any existing record. The relevant function, i.e., change Employee Cost Centre must be done from the Cost

For Info Only - How to Import & Download?

Click the Download button to download the file format.

Enter the details required to import.

Review the details entered in your MS Excel

Import the file into ExpenseOnDemand

The imported Employees will be saved under "Not Invited" Status.

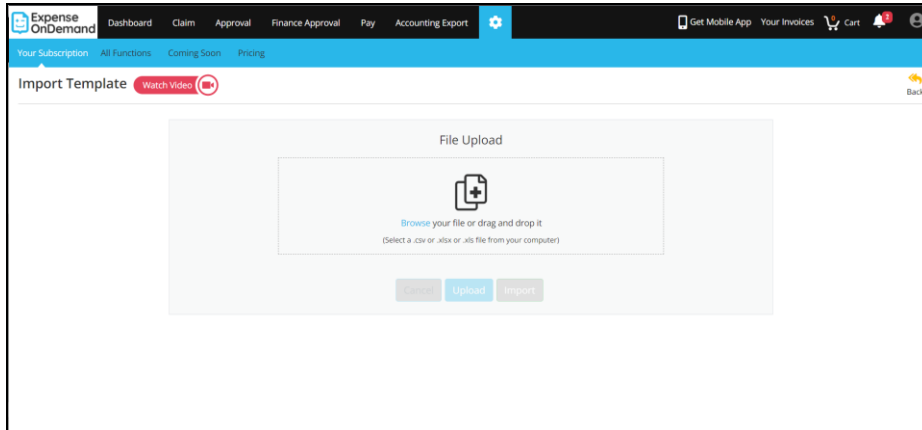
Use the link "Download list of existing Employees in your subscription" to export all Employees in your subscription.

Close

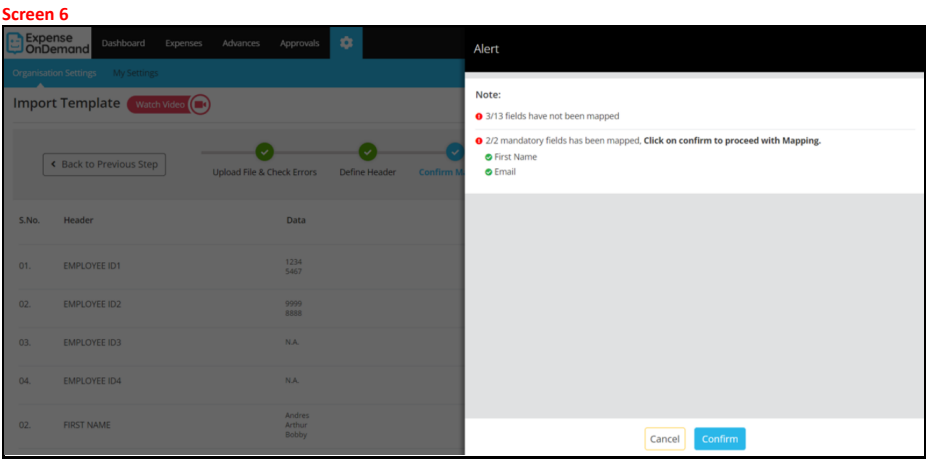
Commented [AS8]: Text to be reviewed after progress demo

7. Clicking on the 3rd option, i.e., **Import Employees**, the user will be redirected to the universal import landing screen (**Screen 5**).

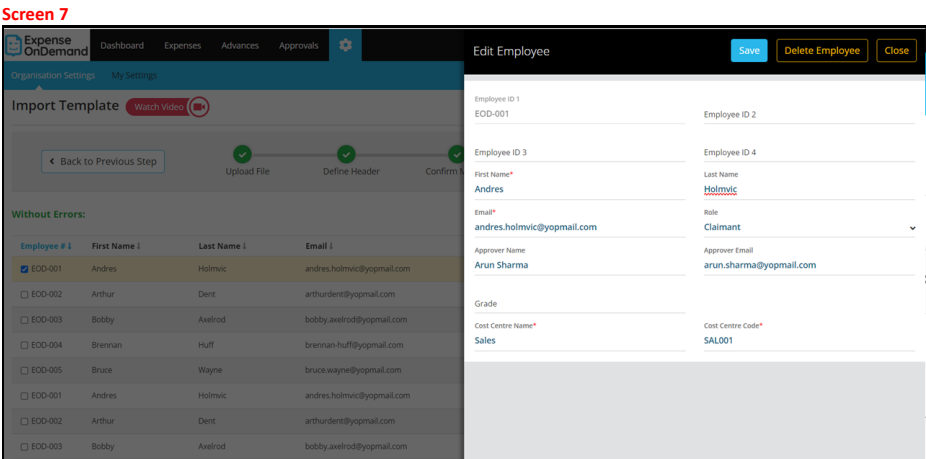
Screen 5



8. The flow for **Uploading** and **Importing** the file into system will remain the same. FM can import CSV as well as Excel file.
9. The steps of Define Header, Confirm Mapping and Review and fix error will remain the same.
10. The alert at **Confirm Mapping** stage should only display in the list and validate the undermentioned fields:
 - a. Employee ID 1 – **Optional**
 - b. Employee ID 2 – Optional (if not filled, default should be blank)
 - c. Employee ID 3 – Optional (if not filled, default should be blank)
 - d. Employee ID 4 – Optional (if not filled, default should be blank)
 - e. **First Name - Mandatory**
 - f. Last Name – Optional (if not filled, default should be blank)
 - g. **Email - Mandatory**
 - h. Role – **Optional** (if not filled, default should be Claimant)
 - i. Approver Name – Optional (if not filled, default should be blank)
 - j. Approver Email – Optional (if not filled, default should be blank)
 - k. Cost Centre Name: Optional
 - l. Cost Centre Code 1: Optional
 - m. Grade Name: Optional
11. The cost centre name and code (if Cost centre function is not subscribed) field will be displayed as disabled in the drop down at confirm mapping, on clicking / selecting the marketing pop up for Cost centre will be displayed in the panel (this is already working in Universal Import).
12. Please note this enhancement will also make the Employee ID as optional field in import, meaning if the user does not enter Employee ID1 then the system will fill in random generate code (this already implemented).



13. The **Review** step will allow the user to edit the record and correct the errors.



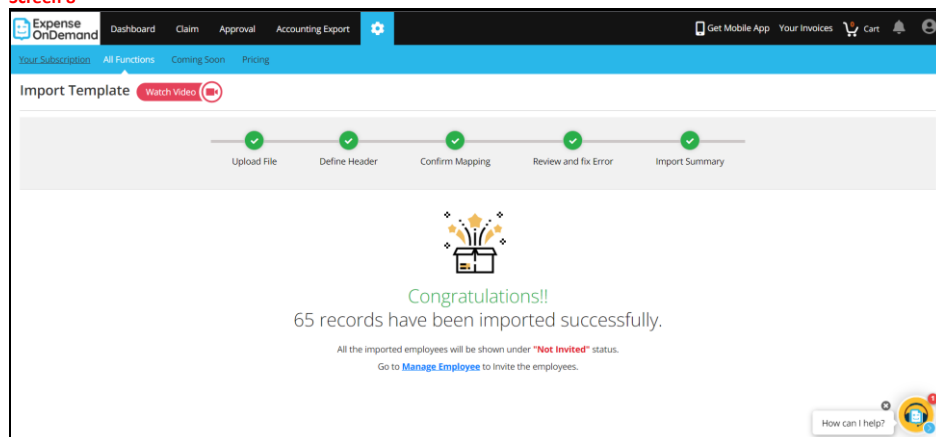
14. The panel's field will be dynamic and will be displayed if selected at confirm mapping.
15. The grid will show the numbers of error under error column, while the panel will show the error with each field respectively (this is currently working in universal import).
16. The validation check will remain as it is working on the current Live – Universal Import as following (for reference):
- a. Blank first name
 - b. Invalid first name
 - c. Blank email
 - d. Invalid email
 - e. Invalid role (if selected at confirm mapping)
 - f. Invalid Approver name/email (if selected)
 - g. Blank Cost centre name (if selected at confirm mapping or if cost centre function is subscribed)
 - h. Blank Cost centre code 1 (if selected at confirm mapping or if cost centre function is subscribed)
 - i. Invalid Cost centre name (if selected at confirm mapping or if cost centre function is subscribed)
 - j. Invalid Cost centre code 1 (if selected at confirm mapping or if cost centre function is subscribed)

Manage Employee – New Import

17. The employee ID will not be validated as it will be optional so if found blank, system will enter random string (as currently working on Live. If Employee ID is present in the file, then the application will check for unique validation).
18. The data with error will be exported and without error can be imported (standard flow of the universal import).
19. Once imported the FM will be taken to Import Summary screen.

Commented [AS9]: Add a screen with errors in the panel and the grid

Screen 8



20. The imported employees will be added under “**Not Invited**” status, in **Manage Employees**.
21. In case of reimport the information for any employee can be updated without changing any other settings, meaning Records can be re imported with new Approver assigned to any employee, ~~or new vehicle assigned~~, new role assigned, but this will not change the employee’s current status or any other info such cost centre/grade assignment etc.
22. Every time the information is being added by a reimport of data, the log for each employee at **Manage Employee** should capture the same.
23. When the Cost centre function is subscribed, the import will now have the following field required to be imported:
 - a. Employee ID 1 - **Optional**
 - b. Employee ID 2 – Optional (if not filled, default should be blank)
 - c. Employee ID 3 – Optional (if not filled, default should be blank)
 - d. Employee ID 4 – Optional (if not filled, default should be blank)
 - e. First Name - **Mandatory**
 - f. Last Name – Optional (if not filled, default should be blank)
 - g. Email - **Mandatory**
 - h. Role – Optional (if not filled, default should be Claimant)
 - i. Approver Name – Optional (if not filled, default should be blank)
 - j. Approver Email – Optional (if not filled, default should be blank)
 - k. Cost centre Name – **Mandatory**
 - l. Cost Centre Code – **Mandatory**
24. The validation and alert will now also show the Cost centre name and code field. On clicking upon the **Export /Import employee**, the user will have the new sample grid and same will be added in the excel file for download. This is already implemented.
25. For any file where Grade Name is present but description is not present then the import will add “-” hyphen in the description by default and this will allow user to import grade without description. And if the description column is available in the import file, the system will pick the column value.
26. The confirm mapping step will auto map based on keyword, if all the columns are matched then also the user will not skip the step as they has to confirm the mapping.