

**New Architecture**  
**Passenger Load Miles**  
**User Story**



# Contents

Business Requirements: .....3

Use case 1: Function Details and Pricing for Passenger / Load Miles .....4

Use case 2: FM assigns Ownership types to the Passenger/Load Allowances.....5

Use Case 3: Alert when New Ownership type is activated ..... 12

Use case 4: Claimant enters the Passenger / Load Miles: ..... 13

Use case 5: Impacts: ..... 18

Use case 6: Unsubscribe Passenger and load:..... 20

## Business Requirements:

### 1. Passenger / Load Miles

- a. The Passenger / Load miles is usually made available to Claimants when they travel on business and carry 1 or more fellow passengers with them (maximum 3) in their car.
- b. There can be one or more than one Passengers in Round trip/Multiple Legs.
- c. The total amount calculated in case of passengers/Load are there will be:
  - i.  $\text{Amount} = \text{Distance Travelled} * [\text{Rate} + \text{Rate per Passengers}]$ .
  - ii. The rate will increase by 0.5 per passenger
  - iii. The rate will increase by 0.3 per Load
- d. The Passenger/Load Miles function will be a Paid function.

## Use case 1: Function Details and Pricing for Passenger / Load Miles

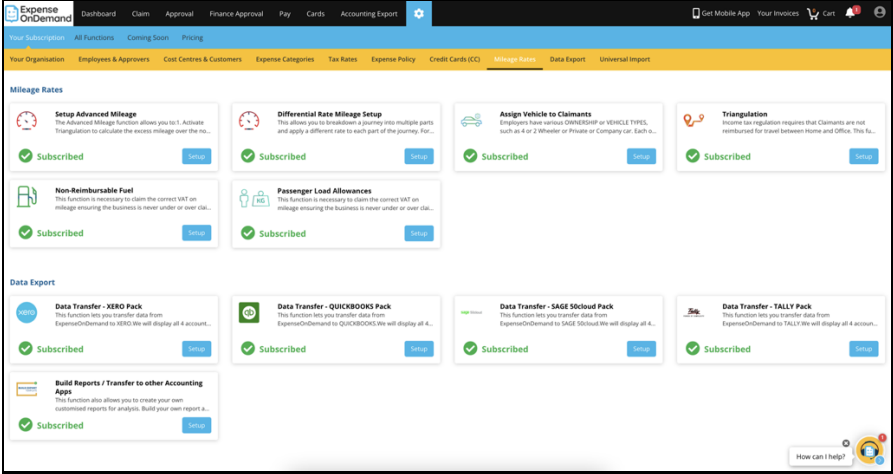
1. Passenger and Load Miles will be available under Mileage Rate function group. This is a dependent function on the Advance Mileage
2. Passenger/ Load Miles Function Text and Pricing Details:
  - a. Function detail text: This function allows the claimants to claim for carrying Passenger(s) and/or Load in their vehicles. In addition, the claimant can also enter a journey with multiple legs, with each leg discretely displayed.
  - b. **Pricing: 0.05 GBP or 5 INR or 0.20 AUD or 0.15 USD or 0.15 EUR.**



Use case 2: FM assigns Ownership types to the Passenger/Load Allowances

- 1. The FM will have the function to setup the **Passenger Load Allowance(s)** under Mileage Rate function group. **(Screen 1)**

Screen 1:

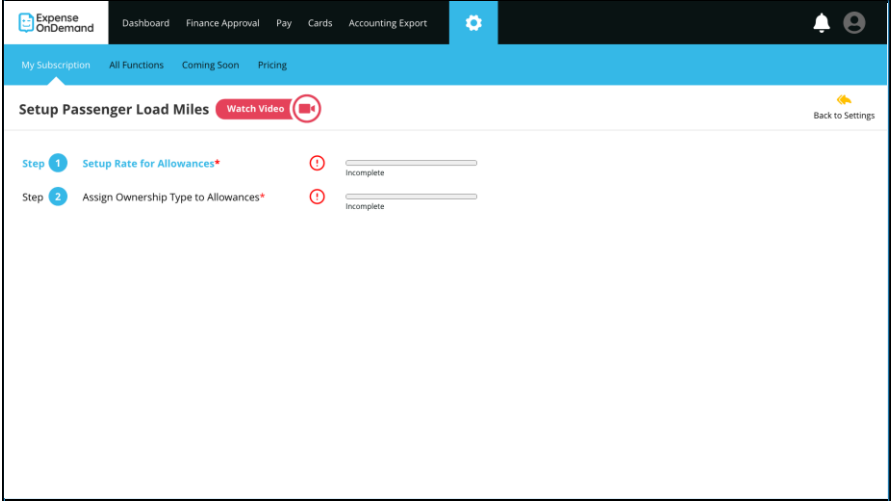


- 2. Upon clicking on **Passenger Load Allowance** function, the FM will navigate to the **Setup Passenger Load Miles** screen.
- 3. The **Setup Passenger Load Miles** screen will be a wizard with two steps which will be marked as incomplete:
  - a. **Setup Rate for Allowance**
  - b. **Assign Ownership Type for Allowances**

**Commented [NB1]:** Default Setup Message displays if none of Rate has been changed.

**Commented [NB2]:** We will display numbers / Total combinations.

Screen 2



**Commented [SN3]:**  
Setup Rate(s) for Passenger & Load Allowance(s)  
  
Assign Ownership Type(s) to Allowance(s)

- 4. Clicking on Step 1, FM will be taken to the new screen, i.e., **Setup Rate for Allowances**.

Multiple Legs & Passenger Load Miles



Commented [NB4]: Video icon will be on Wizard only now.

- 5. The FM will see the following fields in the grid: (Screen 3)
  - a. **Allowances:** The list of allowances will be displayed under this field. This will be pre-populated.
  - b. **Rate:** The default rate will be displayed against each allowance type. This will be pre-populated.
  - c. **Log:** This will display the logs which will show changes within a rate.
- 6. We will setup the default rates here for all combinations, which are:
  - i. 1 Load 3p
  - ii. 1 Passenger 5p
  - iii. 2 Passengers 10p
  - iv. 3 Passengers 15p
  - v. 1 Passenger + Load 8p
  - vi. 2 Passengers + Load 13p
  - vii. 3 Passengers + Load 18p

Screen 3:

Expense OnDemand			
Dashboard Finance Approval Pay Cards Accounting Export			
My Subscription All Functions Coming Soon Pricing			
Setup Rate for Allowances Watch Video Back to Setup			
<input type="checkbox"/>	Allowances	Rate	Log
<input type="checkbox"/>	1 Passenger	0.05	
<input type="checkbox"/>	2 Passenger	0.10	
<input type="checkbox"/>	3 Passenger	0.15	
<input type="checkbox"/>	1 Load	0.10	
<input type="checkbox"/>	1 Passenger + 1 Load	0.10	
<input type="checkbox"/>	2 Passenger + 1 Load	0.13	
<input type="checkbox"/>	3 Passenger + 1 Load	0.18	

- 7. The FM will be able to edit the rate in the Allowances type by clicking on the checkbox against any of the Allowance type. (Screen 4)



Screen 4:

Expense OnDemand

DashboardFinance ApprovalPayCards

My SubscriptionAll FunctionsComing SoonPricing

Update Rate for 1 Passenger

LogSaveClose

Setup Rate for Allowances

Watch Video

Allowances

☐

1 Passenger

☐

2 Passenger

☐

3 Passenger

☐

1 Load

☐

1 Passenger + 1 Load

☐

2 Passenger + 1 Load

☐

3 Passenger + 1 Load

Rate

0.04

TIP:

Please note, you can select multiple allowances and edit their rates.

8. The FM can edit the **Rate** of the One some or all Allowances using the Bulk Actions. All the actions performed by FM should be captured in the log of the respective ownership type.

Screen 5

Expense OnDemand

DashboardFinance ApprovalPayCards

My SubscriptionAll FunctionsComing SoonPricing

Bulk Actions: Selected 3

SaveClose

Setup Rate for Allowances

Watch Video

Allowances

☐

1 Passenger

☒

2 Passenger

☒

3 Passenger

☐

1 Load

☐

1 Passenger + 1 Load

☐

2 Passenger + 1 Load

☐

3 Passenger + 1 Load

Allowances	Rate
1 Passenger	<input type="text" value="0.05"/>
2 Passenger	<input type="text" value="0.10"/>
3 Passenger	<input type="text" value="0.15"/>

9. Once the FM has **Updated the Rate** for the allowance and **saved**, this will be **displayed** in the grid. (Screen 6)



Screen 6:

Expense OnDemand

DashboardFinance ApprovalPayCardsAccounting Export

⚙️

🔔👤

My SubscriptionAll FunctionsComing SoonPricing

Setup Rate for Allowances

Watch Video📺

Back to Setup🏠

<input type="checkbox"/>	Allowances	Rate	Log
<input type="checkbox"/>	1 Passenger	0.04	<div>🔍✎️</div>
<input type="checkbox"/>	2 Passenger	0.09	<div>🔍✎️</div>
<input type="checkbox"/>	3 Passenger	0.14	<div>🔍✎️</div>
<input type="checkbox"/>	1 Load	0.10	<div>🔍✎️</div>
<input type="checkbox"/>	1 Passenger + 1 Load	0.10	<div>🔍✎️</div>
<input type="checkbox"/>	2 Passenger + 1 Load	0.13	<div>🔍✎️</div>
<input type="checkbox"/>	3 Passenger + 1 Load	0.18	<div>🔍✎️</div>

10. Once the Rate are setup, the FM can click on Back to Setup, to redirect them back to the wizard, where the Step 1 will now be displayed as Completed. (Screen 7)

Screen 7:

Expense OnDemand

DashboardFinance ApprovalPayCardsAccounting Export

⚙️

🔔

👤

My SubscriptionAll FunctionsComing SoonPricing

Setup Passenger Load Miles

Watch Video📺

Back to Settings🔙

Step 1

Setup Rate for Allowances\*

✔️

Complete

Step 2

Assign Ownership Type to Allowances\*















❌

Incomplete

11. Clicking on Step 2, FM will be taken to the new screen, i.e., Assign Ownership Type to Allowances (Screen 8).



## Screen 8:

Expense OnDemand			
Dashboard Finance Approval Pay Cards Accounting Export			
My Subscription All Functions Coming Soon Pricing			
Assign Ownership Type to Allowances			
Allowances	Ownership Type	Log	
<input type="checkbox"/> 1 Passenger	No Ownership Type Assigned	 	
<input type="checkbox"/> 2 Passenger	No Ownership Type Assigned	 	
<input type="checkbox"/> 3 Passenger	No Ownership Type Assigned	 	
<input type="checkbox"/> 1 Load	No Ownership Type Assigned	 	
<input type="checkbox"/> 1 Passenger + 1 Load	No Ownership Type Assigned	 	
<input type="checkbox"/> 2 Passenger + 1 Load	No Ownership Type Assigned	 	
<input type="checkbox"/> 3 Passenger + 1 Load	No Ownership Type Assigned	 	

12. On the **Assign Ownership Type to Allowances** screen, the FM will be displayed following columns:
  - a. **Allowances:** The list of allowances will be displayed under this field. This will be pre-populated.
  - b. **Ownership Type:** The ownership type to which this allowance has been assigned. By default this column will display 'No Ownership Type Assigned' in red font.
  - c. **Log:** This will display the logs which will show changes within allowances type.
13. The FM can click on the check box or the edit icon for any row to open the panel for Ownership assignment.

## Screen 9

Expense OnDemand			
Dashboard Finance Approval Pay Cards			
My Subscription All Functions Coming Soon Pricing			
Assign Ownership Type to Allowances			
Allowances	Update Ownership Type for 1 Passenger		
<input type="checkbox"/> 1 Passenger	<div>Assign / Unassign Ownership Types</div> <div> <input type="checkbox"/> All  <input checked="" type="checkbox"/> Private Car  <input checked="" type="checkbox"/> Car Allowance  <input type="checkbox"/> Diesel-Big  <input type="checkbox"/> Diesel-Medium  <input type="checkbox"/> Petrol Big  <input type="checkbox"/> Gas Single Rate  <input type="checkbox"/> Motor Cycle           </div>		
<input type="checkbox"/> 2 Passenger			
<input type="checkbox"/> 3 Passenger			
<input type="checkbox"/> 1 Load			
<input type="checkbox"/> 1 Passenger + 1 Load			
<input type="checkbox"/> 2 Passenger + 1 Load			
<input type="checkbox"/> 3 Passenger + 1 Load			

14. The Panel will display the header text "Update Ownership Type for <Allowance Name>". The Active ownership will be displayed and FM can select One/Some or ALL ownership type to assign Allowance to.
15. The FM can also select Multiple Allowances at once to assign ownership to them in bulk at once.

## Screen 10

Expense OnDemand Dashboard Finance Approval Pay Cards Bulk Action Selected: 3 Save Close

My Subscription All Functions Coming Soon Pricing

**Assign Ownership Type to Allowances** Watch Video

Allowances	Assign / Unassign Ownership Types
<input checked="" type="checkbox"/> 1 Passenger	<input type="checkbox"/> All
<input checked="" type="checkbox"/> 2 Passenger	<input checked="" type="checkbox"/> Private Car
<input checked="" type="checkbox"/> 3 Passenger	<input checked="" type="checkbox"/> Car Allowance
<input type="checkbox"/> 1 Load	<input type="checkbox"/> Diesel-Big
<input type="checkbox"/> 1 Passenger + 1 Load	<input type="checkbox"/> Diesel-Medium
<input type="checkbox"/> 2 Passenger + 1 Load	<input type="checkbox"/> Petrol Big
<input type="checkbox"/> 3 Passenger + 1 Load	<input type="checkbox"/> Gas Single Rate
	<input type="checkbox"/> Motor Cycle

16. Once clicked on **Save** the ownership type, the panel will close and the updated grid will now show the Ownership name on the grid (if only one ownership is assigned), if multiple ownership is assigned then the grid will show the name of the 1<sup>st</sup> ownership name and count of other (example Private Car (+1)).

## Screen 11

Expense OnDemand Dashboard Finance Approval Pay Cards Accounting Export Back to Setup

My Subscription All Functions Coming Soon Pricing

**Assign Ownership Type to Allowances** Watch Video Back to Setup

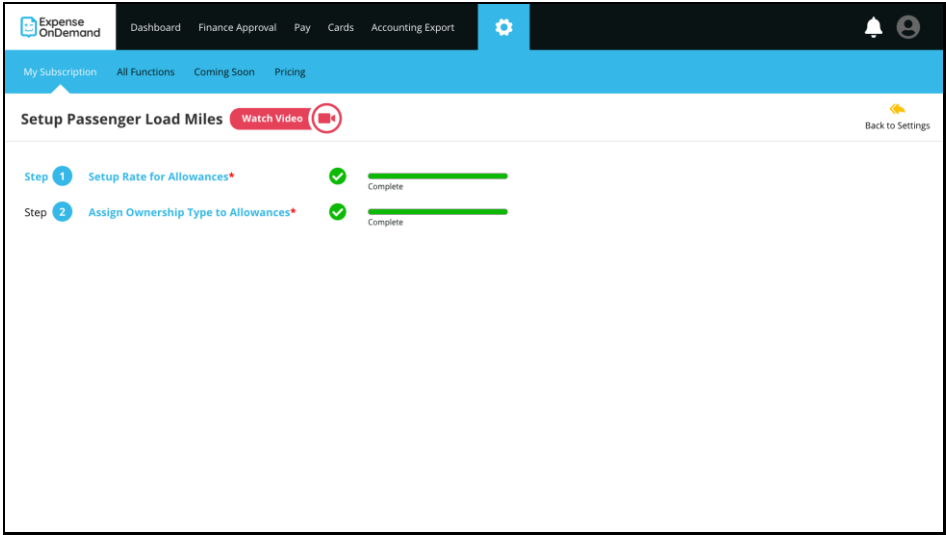
Allowances	Ownership Type	Log
<input type="checkbox"/> 1 Passenger	Private Car (+1)	
<input type="checkbox"/> 2 Passenger	Private Car (+1)	
<input type="checkbox"/> 3 Passenger	Private Car (+1)	
<input type="checkbox"/> 1 Load	No Ownership Type Assigned	
<input type="checkbox"/> 1 Passenger + 1 Load	No Ownership Type Assigned	
<input type="checkbox"/> 2 Passenger + 1 Load	No Ownership Type Assigned	
<input type="checkbox"/> 3 Passenger + 1 Load	No Ownership Type Assigned	

17. For the assigned ownership type, the claimant will be displayed the option of the Passenger and load on the expense form when the assigned ownership type is there and the respective allowances (for example is Private car is assigned to 1,2,3 passenger options and 1 load only, then private car will not show the '1 Passenger + 1 Load' option).



18. On clicking **Back to Setup** the FM will be redirected to the wizard screen where they will now see the step 2 completed.

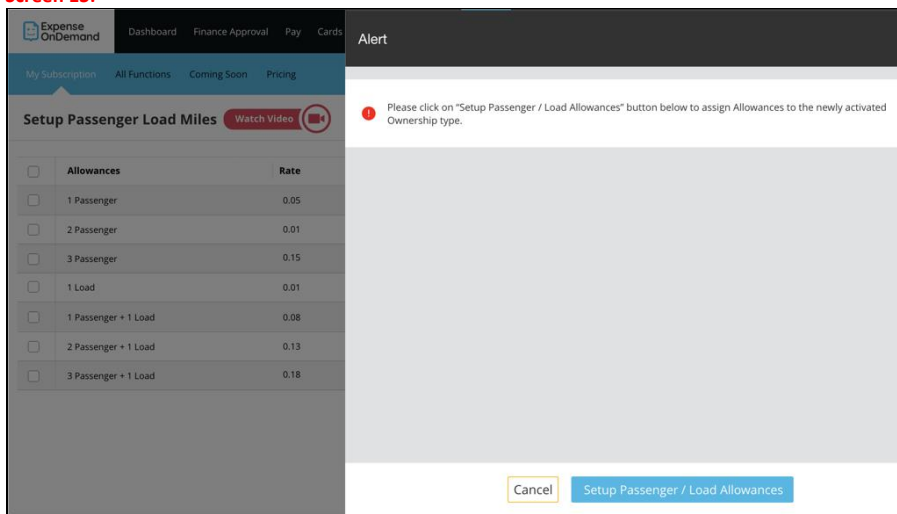
Screen 12



### Use Case 3: Alert when New Ownership type is activated

1. When the Passenger Load function is purchased, and any new Ownership type is activated the FM will be notified regarding the same.
2. As soon as the FM activates and saves the Ownership type, he will get an alert with the message “[Please click on “Setup Passenger Load Allowances” button below to assign Allowances to the newly activated Ownership type.](#)” (Screen 13)
3. Below the Message we will show the “Setup Passenger /Load Allowances” button, which will be clickable button and redirect the user to Setup Passenger / Load Allowances screen. (Screen 3). Clicking on Cancel button will close the alert.

#### Screen 13:



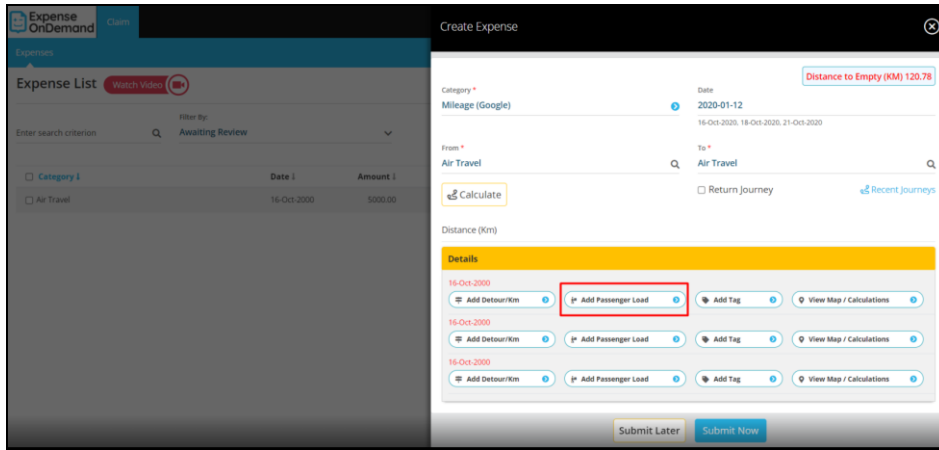
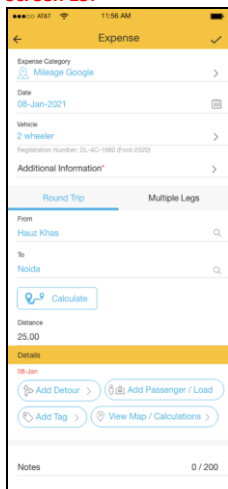
The screenshot displays the Expense OnDemand application interface. At the top, a navigation bar includes 'Expense OnDemand', 'Dashboard', 'Finance Approval', 'Pay', and 'Cards'. Below this, a secondary bar shows 'My Subscription', 'All Functions', 'Coming Soon', and 'Pricing'. The main content area is split into two panels. The left panel, titled 'Setup Passenger Load Miles', features a 'Watch Video' button and a table of allowances. The right panel, titled 'Alert', contains a message and two buttons at the bottom: 'Cancel' and 'Setup Passenger / Load Allowances'.

Allowances	Rate
<input type="checkbox"/> 1 Passenger	0.05
<input type="checkbox"/> 2 Passenger	0.01
<input type="checkbox"/> 3 Passenger	0.15
<input type="checkbox"/> 1 Load	0.01
<input type="checkbox"/> 1 Passenger + 1 Load	0.08
<input type="checkbox"/> 2 Passenger + 1 Load	0.13
<input type="checkbox"/> 3 Passenger + 1 Load	0.18

**Use case 4: Claimant enters the Passenger / Load Miles:**

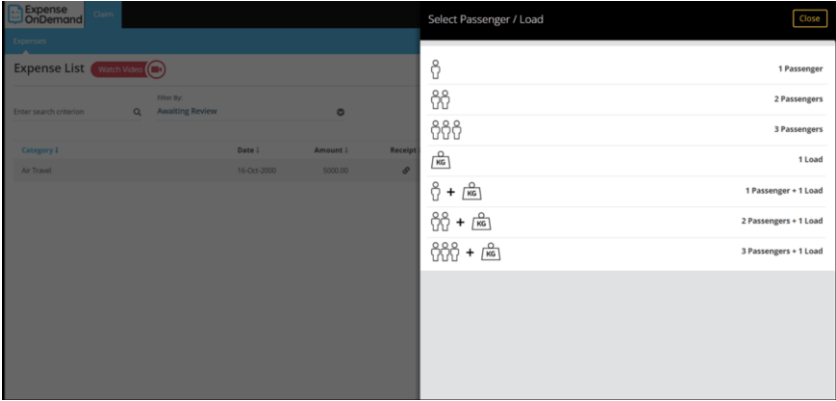
Commented [NB5]: All Use Case must be in Right Order.  
Create expense part will come after the Setup.

1. The claimant can **add** the Passenger / Load Miles in Single / Multiple Journey categories.
2. In case of Multiple Legs the Add Passenger/Load will be available to each Leg separately.

**Screen 14:****Screen 15:**

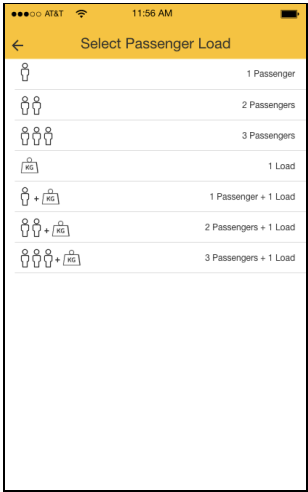
3. The claimant will be navigated to **Select Passenger / Load** screen on web and mobile on clicking on the **Add Passenger / Load** button.

Screen 16:



4. The claimant can select the **Passenger / Load** from the List and the **selected** option will be **displayed** on the screen. (Screen 17)

Screen 17:



5. The value selected will now be populated at the expense detail screen (Screen 18:).

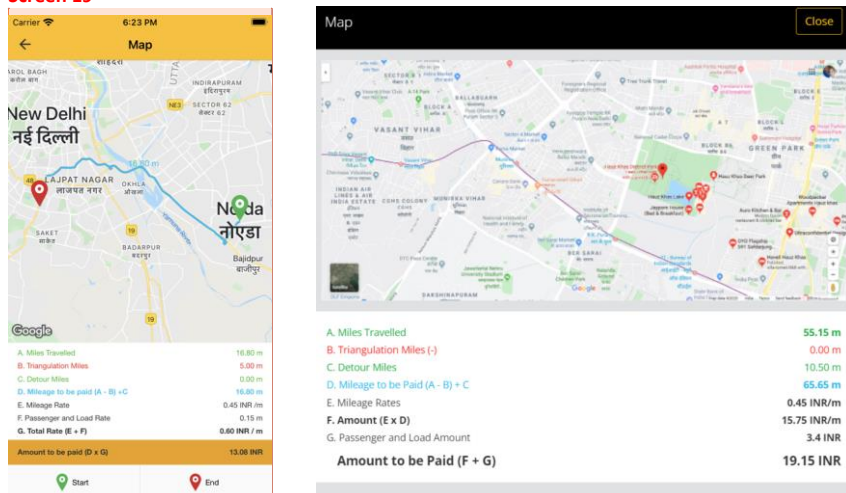
## Multiple Legs & Passenger Load Miles



Screen 18:

6. The Amount calculated for the journey will be calculated as:
  - a. Distance travelled \* rate of the vehicle + the rate per passenger. The rate usually is 0.05 pence. However, as the customer sets this, they should be able to change the default rate.
  - b. In other words, if the claimant is paid 45 pence per mile, and takes 1 passenger then they will be paid 50 pence (45+5). If they take 2 passengers, then they will be paid 55 pence (45+10). If they take 3 passengers then they will be paid 60 pence (45+15). For LOAD, we will apply 3 pence more. So, if there is only LOAD then 3 pence is added to the 45.
7. The map for the mileage google expense will now show the following details for the calculation on the mobile and the web for claimant/ approver and finance approver as shown below.

Screen 19



Commented [AS6]: Screen need to be replaced

A	Miles Traveled
B	Triangulation Miles
C	Detour Miles
D	Miles to be Paid (A - B) - C
E	Mileage Rate
F	Amount (E x D)
G	Passenger / Load Amount
	Amount to be paid (F + G)

Commented [jd7]: Passenger and load rate value will have unit INR/m. Kindly update the screen

8. The Approver detail screen will be displayed as shown below.

## Multiple Legs & Passenger Load Miles



### Screen 20

**Expense Detail - Multiple Legs**

From: Kharhar Puram, Tri Nagar, Delhi, India  
To: Kharhar Puram, Tri Nagar, Delhi, India  
Miles Travelled: 0.00 m  
Passenger Load: 0.00 m  
Detour: 0.00 m

**Expense Detail - Round Trip**

From: Delhi, India  
To: Preet Vihar, Delhi, India  
Miles Travelled: 10.00 m  
Triangulation Miles: 0.00 m  
Detour Miles: 0.00 m  
Miles to be paid (A - B) + C: 10.00 m  
Mileage Rate: 0.45 INR/m  
Passenger and Load Rate: 0.15 m  
Total Rate (E + F): 0.60 INR / m  
Amount to be paid (D x G): 13.00 INR  
Total Amount: 13.00 INR

**Commented [jd8]:** As discussed with Abhiranjan, we are removing total amount for consistency from map screen

- On the web, approver and finance approval, the passenger and load field value will be displayed the Expense detail in case of Return journey.

### Screen 21

**Commented [AS9]:** Update the screen @balkar

- In case of multiple journey, the passenger and load detail will be displayed at each leg in notes as well as in the calculation of the multiple leg panel.





Screen 22

Multiple Legs

View MapClose

Amount: 1000.00 INRMiles Paid: 66.5 KM

From: Deer Park, Hauz Khas, New Delhi, Deer Park, Hauz...To: Sector 18, Noida - Sect...21.21 m

A. Miles Travelled16.21 m

B. Passenger LoadPassenger (1) Load (1)

C. Detour Miles5.00 m

Total Miles Claimed (A+B+C)21.21 m

Detour Justification Notes

Meeting with Client

Notes

Meeting with Client

View TagView MapView Additional Information

From: Deer Park, Hauz Khas, New Delhi, Deer Park, Hauz...To: Sector 18, Noida - Sect...21.21 m

11. The Finance Approver screen will also show the detail of the Passenger and load miles in addition to other expense information.

12. The Export field will now show one more field which is 'Passenger and Load' which will populate the value.

13. In addition, we will also display the rate in another column. Hence, if there is 1 Passenger, then this column will show 0.05; if there are 2 Passengers, then 0.10 pence and if there are 3 Passengers, then 0.15. Similar will be the case with load.

Commented [NB10]: For Multiple Leg Expenses, the details will be displayed under Notes.

Commented [AS11R10]: Yes. Refer point 10

Page 17 of 20

### Use case 5: Impacts:

1. **Export:** The Export will show one more field, i.e. Passenger and Load. Adding the same into report will give the value which was selected by the claimant.
2. **Audit Trail:**
3. **Approver Historical view:** Passenger and load detail will be shown at the Expense detail.
4. **Integration:** No impact, field will not be added in integration

**Commented [NB12]:** All Use Case must be in Right Order.  
Create expense part will come after the Setup.



### Use case 7: Enhancements (added after development):

1. Detour and Passenger and load icon on mobile create expense should not be displayed if not subscribed or setup (passenger and load assigned to ownership of claimant).
2. The icons for detour and passenger & load miles will now be shown after tag and view map on the expense form at web and mobile.
3. The Passenger and Load will be displayed on the map calculation even though not subscribed but Advance mileage is subscribed.
4. In return journey the passenger and load will remain same as that of single journey.
5. The google calls should not be consumed for Passenger and load miles (to be done with mileage segregation).
6. Manual Mileage expense category will not support passenger and load (already done on mobile).