**Table of Contents**

[1 Scope 2](#_Toc71221818)

[2 Definitions/Abbreviations 2](#_Toc71221819)

[3 Architecture 2](#_Toc71221820)

[3.1 Current State (CS) Architecture 2](#_Toc71221821)

[3.2 Future State (FS) Architecture 3](#_Toc71221822)

[4 Detailed Design 5](#_Toc71221823)

[4.1 User Interface Design 5](#_Toc71221824)

[4.2 Information Security and Compliance 14](#_Toc71221825)

[4.3 Reports Design 15](#_Toc71221826)

[4.4 System Integration Detailed Design 17](#_Toc71221827)

[4.5 Webparts 38](#_Toc71221828)

[4.6 Schedule Jobs 63](#_Toc71221829)

[5 References 64](#_Toc71221830)

[6 Final Design Specification Approvals 64](#_Toc71221831)

This Design Specification (DS) describes the overall solution for ESRA, its components, and intended users. It describes how the system is installed and configured to meet functional requirements.

# Scope

This document defines the DS for the ESRA application

# Definitions/Abbreviations

Reference ITD-0289: Lexicon of Computer Terminology for a complete list of definitions. Also, reference Design Specification guidance for general definitions pertaining to DS.

For project specific definitions used for this document, reference the following table:

| **Term** | **Definition** |
| --- | --- |
| ESRA | Employee Stipend request application |
|  |  |

# Architecture

## Current State (CS) Architecture

### Overview and Shortcomings of the CS

Reference (if any) to the legacy design document

### CS Logical Architecture Diagram

Reference (if any) to the legacy Architecture diagram

## Future State (FS) Architecture

### FS Business Architecture Diagram

#### System Overview

Diagram

Description automatically generated

**Core Platform**: G.Share Online on SharePoint online

**Application Components**: Custom Webparts using SPFx framework.following react components are used :

"@fluentui/react": "^8.5.1",

"@material-ui/core": "^4.11.3",

"@material-ui/data-grid": "^4.0.0-alpha.19",

"@material-ui/icons": "^4.11.2",

"@material-ui/lab": "^4.0.0-alpha.57",

"@microsoft/sp-core-library": "1.11.0",

"@microsoft/sp-lodash-subset": "1.11.0",

"@microsoft/sp-office-ui-fabric-core": "1.11.0",

"@microsoft/sp-property-pane": "1.11.0",

"@microsoft/sp-webpart-base": "1.11.0",

"@pnp/sp": "^2.1.1",

"@pnp/spfx-controls-react": "^2.4.0",

"@pnp/spfx-property-controls": "^2.3.0",

"export-to-csv": "^0.2.1",

"jspdf": "^2.3.0",

"jspdf-autotable": "^3.5.13",

"moment": "^2.29.1",

"moment-timezone": "^0.5.33",

"office-ui-fabric-react": "6.214.0",

"react": "16.8.5",

"react-dom": "16.8.5",

"react-file-viewer": "^1.2.1",

"react-moment": "^1.1.1"

**Backend**: SharePoint Lists and Libraries

**Scheduled Jobs**: Built using Powershell and hosted on an On-Premise machine. Schedule will be set using Windows Scheduler

**Reports**: Excel

**Authentication and Integration**: Azure AD for Application and On Premise AD for schedule jobs

**Hosting Details:**

|  |  |
| --- | --- |
| **Environment** | **G.Share Online** |
| Dev | https://gileadconnect.sharepoint.com/sites/GAppsDev-ESRA |
| Staging | https://gileadconnect.sharepoint.com/sites/GAppsTest-ESRA |
| Production | https://gileadconnect.sharepoint.com/sites/GApps-ESRA |

# Detailed Design

## User Interface Design

### Beneficiary Module

| **DS ID** | **Description** | **Screen Shot** |
| --- | --- | --- |
|  | Enrollment Screen |  |
|  | Terms & Conditions |  |
|  | Request Enrollment |  |
|  | Submitted Request |  |
|  | Request History |  |
|  | Update Request |  |
|  | Cancel Request |  |
|  | Pre-Approved  Request |  |
|  | New Terms and Condition |  |

### Manager/Reviewer Module

| **DS ID** | **Description** | **Screen Shot** |
| --- | --- | --- |
|  | Pending Request |  |
|  | Pre-Approved  Request |  |
|  | Completed Request |  |

### Power user Module

| **DS ID** | **Description** | **Screen Shot** |
| --- | --- | --- |
|  | Reports Screen |  |
|  | Payroll Report |  |
|  | Settings Screen |  |
|  | Request on behalf of |  |
|  | Bulk Upload |  |
|  | Manage Power User |  |
|  | Pending Requests |  |
|  | Completed Requests |  |
|  | Export Users |  |
|  | Export Users |  |
|  | Update Approver |  |
|  | Manage Approval |  |
|  | Manage Approval |  |
|  | Manage Approval |  |
|  | To be cancelled Requests |  |
|  | To be cancelled Requests |  |

## Information Security and Compliance

| **DS ID** | **Use role** | **Frontend Permission** | **Backend Permission** |
| --- | --- | --- | --- |
|  | Beneficiary | Enrollment Screen and Approve and Reject Screen | Contribute without Delete permission |
|  | Manager | Enrollment Screen, Approve and Reject Screen and Stipend Summary | Contribute without Delete permission |
|  | Reviewer | Enrollment Screen and Approve Reject Screen | Contribute without Delete permission |
|  | Power user | Enrollment Screen, Approve and Reject Screen, Reports and Settings Screen, Pending Requests Screen, Request on behalf screen, bulk upload screen and export users screen | Contribute without Delete permission |
|  | Payroll User | Enrollment Screen and Reports | Contribute without Delete permission |
|  | System Admin | Enrollment Screen, Approve and Reject Screen, Reports and Settings Screen, Pending Requests Screen, Request on behalf screen, bulk upload screen and export users screen | Site Collection Admin |

## Reports Design

### Solution Name: ESRAPayrollReport

Webpart Name: ESRAPayrollReport

| **DS ID** | **Event** | **Description** |
| --- | --- | --- |
|  | **OnLoad** | Load webpart content as   * Country:   List Name: Countries  Value: Title column   * Calendar control with month and Year selection |
|  | **Webpart Actions Download** | Get the file from following Location:   * 1. **Document Library name**: Payroll Reports   2. **Filter condition**: Folder = Country Selected and Year = year Selected and Month =Month Selected |
|  | **Webpart Actions Download** | User should be able to download the file |

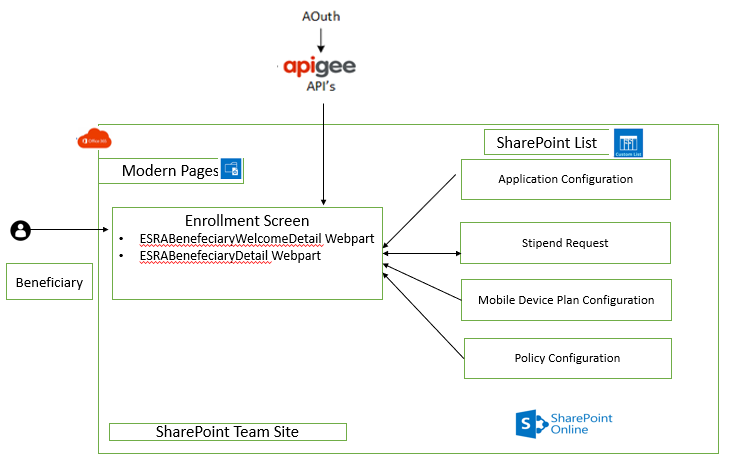
### Enrollment Report Webpart

| **DS ID** | **Event** | **Description** |
| --- | --- | --- |
|  | **OnLoad** | Load grid data with following:   * 1. **List name**: Stipend Request   2. **Column to be shown in Grid**: Beneficiary, Requestor, Department, Requested Date, Reviewer, Currency, Country, Date Reviewed, Stiped amount, Status, Policy Number, Agreement Accepted Date, User Principal name   3. **Drop down with countries name** |
|  | **OnLoad** | **Filter Options:** Beneficiary, Requestor, Department, Requested Date, Reviewer, Currency, Country, Date Reviewed, Stiped amount, Status, Policy Number, Agreement Accepted Date, User Principal name |
|  | **Filter** | User can filter the grid by selecting the country from the dropdown to get the records for that selected country |
|  | **Filter** | User can filter the grid by selecting any filter condition provided to get the refined data to be displayed. |

## System Integration Detailed Design

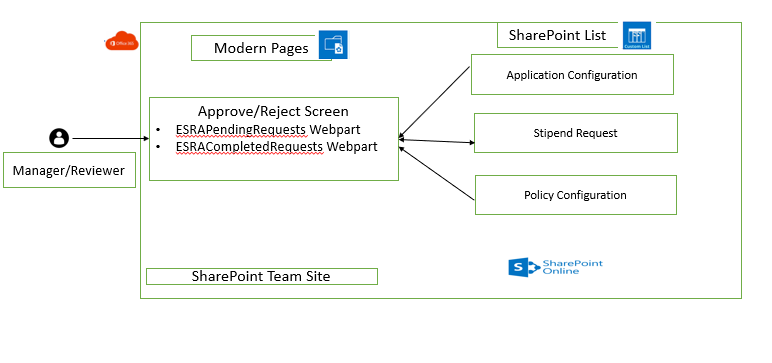
### Beneficiary Module

* Display of the welcome text based on country and beneficiary role
* Creation of Stipend request
* Update of the submitted Request.
* Cancel of submitted Request.
* Sending notification on New/Update/Cancel request
* Re-Enroll the stipend request after 22 months from approve date.
* Sending notification on Re-Enroll request
* Update to new Terms and condition when it is updated



### Reviewer/Manager Module

* Display of the pending requests to the manager.
* Allow Manager for Approve/Reject the requests
* Display all the Pre-Approved requests.
* Display all the completed requests.
* Stipend Summary report



### Power User and System Admin Module

* Raise request on behalf of beneficiary.
* Create bulk upload of beneficiary
* Manage the pending request.
* Export users from different groups.
* Access of the reports section
* Update Approver
* To be cancelled Requests

Diagram

Description automatically generated

Diagram

Description automatically generated

### Azure Automation

* User management in Azure AD
* Send Email after user is added to AD group
* Generation of Payroll report
* Reminder Notifications

Diagram

Description automatically generated

### Database Design

SharePoint lists will be maintained as backend to store the data and configuration related data of the application.

#### Lists Schema

##### Countries

**List name :** Countries

**Description :** Countries List is for having all the possible countries of the users in the system.

|  |  |  |  |
| --- | --- | --- | --- |
| **DS ID** | **Column Name** | **Data Type** | **Description** |

|  |  |  |  |
| --- | --- | --- | --- |
|  | Title | Single line of text | Countries used in the system |
|  | Currency | Single line of text | Currency of the country used in the system |
|  | Active | Yes/No | Set Country to active or in active |
|  | Country Name | Single line of text | Country Name |
|  | ApprovalType | Choice | Approval Type for multi-level |
|  | Levels | Choice | Number of levels for multi-level |
|  | Approvers | Multiline of text | Approvers for multi-level |
|  | PayRollRepGenDay | Choice | Day for payroll to run for specific country |

##### Application Configuration

**List name :** Application Configuration

**Description :** Application Configuration List is created for storing the configuration of the application. All the configurable values in the system we will store in this List with key value pairs.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **DS ID** | **Column Name** | **Data Type** | **Choice Options/Look up Details** | **Description** |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Key | Single line of text |  | Key to select the value from the configuration. This is being used in Code and should not be altered |
|  | Value | Multiline of text |  | Value based on the Key. This will be used in application as per the key selected for this row |
|  | Config Type | Single line of text |  | Define type of configuration |
|  | Country | Lookup | Look up from Countries list Title Column | Filter value to select the value column of this row |
|  | Links | Single line of text |  | Hyper link value. In case there is any link used in the application. This will also be selected based on the key value |
|  | Image URL | Single line of text |  | Image url used in application. Link background images of tab control |
|  | Description | Multi line of text |  | Description of the key to be used in the application |
|  | Role | Multiselect | FTE  Contractor  Remote | Optional column may be used in future |

###### Configuration Specification

The Application configuration list will maintain the configuration data related to the application.

| **DS ID** | Key | ***Value*** | ***Description*** |
| --- | --- | --- | --- |
|  | DeviceEnrolmentSteps | https://gileadconnect.sharepoint.com/sites/MWPT/SitePages/Product%20-%20Mobile%20Device%20Program%20-%20Personal\_owned\_2021\_updated.aspx#enroll-in-gilead-s-byod-%28bring-your-own-device%29-program | Link to device enrollment steps to be displayed on the enroll screen after the request is approved. |
|  | BasicStipendInfo | Gilead recognizes that contingent workers may require the use of mobile technology to perform their job duties.You must read the <a href="https&#58;//gvault.veevavault.com/ui/#doc\_info/1070332" target="\_blank">Mobile Device Policy</a> before requesting to enroll your personal mobile device. Your request to enroll your personal mobile device must be approved by your manager. Once approved, you will receive an email with instructions on how to enroll your mobile phone.. | Basic Stipend welcome message to be displayed on the enrollment screen for the contractor. |
|  | AllowedLocations |  | Allowed user country locations this application is intended for |
|  | BasicStipendInfoFTE | Gilead recognizes that employees may require the use of mobile technology to perform their job duties. You must read the <a href="https&#58;//gvault.veevavault.com/ui/#doc\_info/1070332" target="\_blank">Mobile Device Policy</a> before requesting to enroll your personal mobile device. Your request to enroll your personal mobile device and to receive a stipend must be approved by your manager. Once approved, you will receive an email with instructions on how to enroll your mobile phone. | Basic Stipend welcome message to be displayed on the enrollment screen for the full-time users |
|  | ADUserLocation | work\_country | To get the user work\_country property value from the worker data using APIGEE api call |
|  | NonUSMsg | <b>Please note%26%2358; this new Mobile Enrollment and Stipend Request portal is currently available for US employees and contingent workers only; it is not presently available in countries outside the US. Please raise a SPARC ticket if you have questions. <br> Thank you. </b> | Validation message for Non-US country user |
|  | UserDataApiURL | https%26%2358;//api-uat.gaim.gilead.com/v1/workerdata/l2?client\_id=%26%23123;CLIENTID%26%23125;%26amp;filter=email\_address='%26%23123;EMAILADDRESS%26%23125;' | APIGEE api url to get user worker data |
|  | UserJobTitle | job\_title | To get the user job\_title property value from the worker data using APIGEE api call |
|  | UserHomeCountry | host\_country | To get the user host\_country property value from the worker data using APIGEE api call |
|  | UserWorkCountry | work\_country | To get the user work\_country property value from the worker data using APIGEE api call |
|  | UserJobGrade | pay\_grade | To get the user pay\_grade property value from the worker data using APIGEE api call |
|  | UserDepartment | department\_description | To get the user department\_description property value from the worker data using APIGEE api call |
|  | UserWorkerType | worker\_type | To get the user work\_type property value from the worker data using APIGEE api call |
|  | CancelMsgFTE | Please confirm you would like to cancel this request. <br> If canceled, you will need to create a new request to enroll. | Pop up message on enroll screen while canceling the request for full time user |
|  | OptoutMsgFTE | Are you sure you want to end your enrollment in the Bring Your Own Device (BYOD) program and stop your monthly stipend payment? | Pop up message on enroll screen while canceling the enrollment request for full time user |
|  | CancelSuccessMsg | Your request has been cancelled successfully | Success message to be displayed on enroll screen after cancelling request |
|  | OptoutSuccessMsg | Your request for Cancel Enrollment has been successful | Success message to be displayed on screen enroll after cancelling enrollment request |
|  | RequestonBehalfMsg | BENEFICIARY's enrollment request has been submitted successfully. | Success message on request on behalf screen after submitting a request on beneficiary behalf |
|  | NoPendingRequest | There are no request to process for you | Message to displayed on the pending requests screen when there are no request pending for line manager |
|  | ApprovedMsg | Request Approved Successfully | Success message on approve/reject screen after approving a request |
|  | RejectedMsg | Request Rejected Successfully | Success message on approve/reject screen after rejecting a request |
|  | RequestBehalfUser | BENEFICIARY request already exists | Validation message if the selected beneficiary already exists in the system |
|  | CancelMsg | Please confirm you would like to cancel this request. <br> If canceled, you will need to create a new request to enroll. | Pop up message on enroll screen for cancelling request for contractor |
|  | grant\_type | client\_credentials | Grant type which required to oauth authorization |
|  | client\_id | C2mWTIMm9vo5coldyKwvTAcObMqa5OQ7 | Client id which is required for the APIGEE api call |
|  | client\_secret | GkRTQkrtb4YnYflB | Client secret which is required for the APIGEE api call |
|  | OauthTokenApiURL | https%26%2358;//api-test.gaim.gilead.com/v1/oauth/generatetoken | Oauth token api url |
|  | OptoutMsg | Are you sure you want to end your enrollment in the Bring Your Own Device (BYOD) program and stop your monthly stipend payment? | Pop up message on enroll screen for cancelling enrollment request for contractor |
|  | NewRequestSuccessMessage | Your request has been submitted. | Success message on enroll screen after submitting a new request |
|  | UpdateRequestSuccessMessage | Request has been submitted for update | Success message on enroll screen after updating a request |
|  | NonSelectMSG | Please select a request | validation message if user try to approve/reject a request without selecting a item in the grid |
|  | AutoApprovedGradeValue | 35 | If the pay\_grade is greater than and equal to 35 the request has to Auto-approved |
|  | RequestApproved | Request Approved Successfully | Success message on enroll screen after approving a request |
|  | PR-BatchID | Stipend | Payroll report Batch ID |
|  | PR-Earnings4Code | CEL | Payroll report Earnings code |
|  | PR-Pay | 1 | Payroll report pay number |
|  | PR-Taxfrequency | B | Payroll report tax frequency |
|  | PR-Cancelpay |  | Payroll report cancel pay |
|  | ReportNotFound | No Report Found | Validation message on the payroll report screen if the report is not found for selected month and year |
|  | DownloadMsg | Report Downloaded Successfully | Success message on payroll report screen after downloading a report |
|  | FutureMonthMsg | Selected month cannot be from the future | Validation message on payroll report screen if user selects a month from future |
|  | NoDataFound | Error occurred. Please raise a SPARC ticket. Thank you. | Exception message when user APIGEE data is not found |
|  | ErrorSubmitting | Error in submitting the request | Exception message when user cannot submit the data |
|  | PendingErrorMsg | Error in processing the request | Exception message when line manager cannot approve/reject the request |
|  | CancelErrorMsg | Error in cancelling the request | Exception message when user cannot cancel the request |
|  | UpdateErrorMsg | Error in updating the request | Exception message when user cannot update the request |
|  | PR-HREmployeeNumber | 151,568,152,405,201,000,000,000 | Payroll report HR employee number |
|  | CountryConfigError | Country configuration not available | Exception message when user country is configured in the countries list |
|  | NoStipendData | Please select beneficiaries from US regions only | Exception message user related stipend data is not available |
|  | GenericExceptionMsg | Internal Exception occurred Please reach out to admin for more information | Generic exception message to be displayed if application error occurs |
|  | WelcomeMsgNotFound | Welcome Message Not Found | Exception Message if welcome message is not found for current user country |
|  | RejectPopMsg | By rejecting the enrollment request, BENEFICIARY will not be allowed to enroll a phone in the Gilead Bring Your Own Device Program. | Pop up message on approve/reject screen for rejecting a request |
|  | PayrolInstructionMsg | Select country first followed by year and month | Placeholder message on payroll report screen to select country first and then year and month |
|  | LineManagerInstructions | Line Manager Instructions | Message on line manager screen to display instructions for line manager |
|  | PoweruserInstructionMsg | Instructions for Poweruser | Message on request on behalf screen to display the instructions to power users |
|  | UserInstructions | https%26%2358;//gileadconnect.sharepoint.com/sites/dev\_ESRA/Shared%20Documents/ESRA%20Design%20Specification\_v0.2.docx | User instruction guide |
|  | EnrollmentReportInstMsg | Instructions for enrollment report | Message to be displayed on Enrollment report screen about the instructions |
|  | PowerUserGroupName | GileadESRADev PowerUsers | Power user group name |
|  | PayrollGroup | GileadESRA Payroll | Payroll group name |
|  | PowerUserGroupUrl | /\_layouts/15/people.aspx?MembershipGroupId=20 | Power user group Url |
|  | ad\_path | ad\_path | Active directory path of the user |
|  | OnBehalfofNoDataFound | Worker data not found in APIGEE API | Exception message on request on behalf of screen when selected beneficiary worker data is not found |
|  | EnrollScreenUrl | /SitePages/Enroll.aspx | Relative path of Enroll screen |
|  | ApproveRejectUrl | /SitePages/Approve-Reject.aspx | Relative path of Approve Reject screen |
|  | RequestonbehalfScreenUrl | /SitePages/Enroll.aspx?PopOpen=true | Relative path of Enroll screen with query string |
|  | PayrolReportLibrary | PayrollReports | Payrol report library |
|  | PayrollAttachmentFileName | Cell Stipend.xlsx | File name for payrol report |
|  | Proxyenabled | false | Proxy enabled value |
|  | AccessTokenRequired | false | Access token required value |
|  | Proxyurl | https://navpn.gilead.com | Proxy url |
|  | SmtpserverInfo | mailrelay.gilead.com | Smtp server details to send notifications |
|  | PayrollReportMonthDay | 05 | Day of the month when job will run |
|  | InstructionAttachmentUrl | /sites/GAppsTest-ESRA/Shared Documents/HelpDoc.docx | Instruction attachment url |
|  | IntuneGroupName | MobileIntune-ProdUAT | Mobile Intune group name |
|  | EmailFromText | Mobile Enrollment and Stipend Request Portal (Staging) | From text to displayed on the email from scheduled jobs |
|  | InstructionAndroidDeviceURL | https://gileadconnect.sharepoint.com/sites/MWPT/Shared%20Documents/Mobile%20Device%20Program/Mobile%20Device\_Intunes%20Enrollment\_Android.pdf | Android Device instruction pdf URL after user request is approved and added to AD group |
|  | InstructionIOSDeviceUrl | https://gileadconnect.sharepoint.com/sites/MWPT/Shared%20Documents/Mobile%20Device%20Program/Mobile%20Device\_Intunes%20Enrollment\_iOS.pdf | IOS Device instruction pdf URL after user request is approved and added to AD group |
|  | ApprovedEmailFAQURL | https://gileadconnect.sharepoint.com/sites/MWPT/SitePages/Product%20-%20Mobile%20Device%20Program%20-%20FAQ.aspx | FQA URL for device enrollment after user request is approved and added to AD group |
|  | ApprovedEmailMobileDeviceUrl | https://gileadconnect.sharepoint.com/sites/MWPT/SitePages/Product%20-%20Corporate%20Phone%20Project.aspx | Mobile Device plan URL for device enrollment after user request is approved and added to AD group |
|  | ActiveUserDataApiURL | https&#58;//api-uat.gaim.gilead.com/v2/workerdata/l2?client\_id=&#123;CLIENTID&#125;&amp;email\_address=&#123;EMAILADDRESS&#125; | Active User data url |
|  | ExpirationPeriod | 24 | Expiration Period for sending notification email |
|  | ExpiredUserComment | Status Updated as Cancelled due to Expiration date | Expired user comments |
|  | LeftUserComments | User Removed from AD as employee status is Inactive in Worker Data | Left user comments |
|  | MobileDeviceDocumentsURL | https://gileadconnect.sharepoint.com/sites/MobilePolicy | Mobile Device Documents URL |
|  | UpdateSuccessMsg | Line manager Updated | Line manager Updated success message |
|  | UserLocationCode | location\_code | Property for User Location from worker data |
|  | Azure-IntuneGroupName | MobileIntune-BYOD | Azure-Intune Group Name |
|  | AzureTanentID | AzureTanentID | Azure Tanent ID |
|  | NoRecordExists | There is no record to display | There is no record to display |
|  | NoInProgressRecords | There are no pending request | No In Progress Records for power user |
|  | BulkUploadTemplateLocation | https://gileadconnect.sharepoint.com/sites/GApps-ESRA/Shared%20Documents/StipendTemplate.csv | Bulk Upload Sample Template Location |
|  | IntuneGroupName\_Retired | MobileIntune-BYOD\_Retire | Intune Group Name for Retired stipends |
|  | Azure-IntuneGroupName | MobileIntune-BYOD | Azure-IntuneGroupName |
|  | AzureTanentID | AzureTanentID | AzureTanentID |
|  | NotValidEmailID | Email ID is not valid in Input file. | Email ID is not valid in Input file. |
|  | NoStipendAmt | Stipend Amount is not defined/valid in Input file. | Stipend Amount is not defined/valid in Input file |
|  | StipendContractorError | Stipend Amount should not defined for Contractor in Input file. | Stipend Amount is defined for Contractor in Input file |
|  | ValidEmployeeType | Employee Type is not correctly defined. | Employee Type is not defined |
|  | ValidAmount | Amount is not correctly defined. | Amount is not correctly defined |
|  | ValidBeneficiaryName | Beneficiary Name is not correctly defined. | Beneficiary Name is not correctly defined |
|  | ValidatingErrorBulk | Error occurred while validating. please check data and try again. | Error occurred while validating. please check data and try again |
|  | BulkUploadLimit | Only 500 items at a time | Only 500 items at a time |
|  | BulkUploadMobileMsg | Not Available for mobile devices | Bulk upload Not Available for mobile devices |
|  | ReminderLineManager | 5 | Reminder days for Line Manager if the request is In-Progress |
|  | ReminderPowerUser | 20 | Reminder days for poweruser if the request is In-Progress |
|  | ApprovalMailDelayTime | 120 | ApprovalMailDelayTime |
|  | WeeklyNotificationDay | Monday | Weekly Notification Start Day |
|  | EmailByodLink | https://gileadconnect.sharepoint.com/sites/MWPT/SitePages/Product%20-Mobile%20Device%20Program.aspx | Email template Byod Link replace |
|  | EmailFAQSLink | https://gileadconnect.sharepoint.com/sites/MWPT/SitePages/Product%20-%20Mobile%20Device%20Program%20-%20FAQ.aspx | Email template FAQS Link replace |
|  | SpecialCharcters | ';\* | Special Characters |
|  | NoPreApprovedRecords | There are no Pre-Approved records | There are no Pre-Approved records |
|  | NoCompletedRequest | There are no Completed records | There are no Completed records |
|  | DownloadStipendUsersReport | Click on 'Export Stipend Users' to download csv | Download Stipend Users |
|  | BasicStipendInfoRemoteFTE | You have been identified as a remote employee who receives a monthly, taxable allowance of $100.00 to offset costs with respect to using your home utilities, internet, phone usage, or devices for business purposes.  Gilead recognizes that employees may require the use of mobile technology to perform their job duties. As a Remote employees, you are also eligible to receive a mobile phone stipend that provides additional reimbursement for mobile phones used for business purposes.   You must read the Mobile Device Policy and agree to the Terms & Conditions before requesting to enroll your personally-owned mobile device. Your request to enroll and to receive a stipend must be approved by your manager. Once approved, you will receive an email with instructions on how to enroll your personally-owned mobile device. | Basic Stipend welcome message to be displayed on the enrollment screen for the remote fulltime users |
|  | UserInternationalAssignment | has\_international\_assignment | User International Assignment |
|  | OfficeType | office\_type | Office Type |
|  | ActiveInactiveUserDataApiURL | https://api.gaim.gilead.com/v2/workerdata/l2?client\_id={CLIENTID}&filter=empl\_status='{EMPL\_STATUS}' | Get all users worker data based on Employee Status |
|  | RunonDays | Saturday | Days in the week for the job to run |
|  | NewTnCsAcceptPeriod | 15 | This is for number of days calculation to cancel the enrollment for not accepting the New TnCs, after notifying the change |
|  | ESRASysAdminGroup | ESRASysAdminNotifications | ESRASysAdminNotifications |
|  | ApprovedUsersFileName | ApprovedUsers | This is for Approved Users File Name while generating every month Approved Users file in the WDHReport Powershell Script |
|  | BaseFileGenerationDay | 02 | This value we are using to generate Base file for each month only once. This file is used to compare the changes for a given country on a given date. |
|  | WDHReportLibrary | WDHReports | Library name of WDHReports |
|  | NoLineManagerRecords | There are no records for the selected Line Manager | This message is shown when the sys admin tries to update the line manager, by selecting the line manager from the control in the Update Line Manager Page |
|  | UpdateNewApprvrErrorMsg | Error in Updating the New Approver | This message is shown when system admin tries to update the old approver with new approver and if it fails. |
|  | ApproverUpdateConfmatnPopUpMsg | On Clicking OK, OLDAPPROVER will be replaced as Approver with NEWAPPROVER.   Are you sure you want to proceed? | This is for confirmation msg in popup while updating for new line manager |
|  | ApproverUpdateSuccessMessageAlert | OLDAPPROVER is successfully replaced as Approver with NEWAPPROVER | this message is shown in the alert when old approver is updated by new approver successfully |
|  | OfficeTypeChange | Cancelling the request as user office type has changed | Cancelling the request as user office type has changed |
|  | ZeroToBeCancelledRecords | There are no records to display | Cancelling the request as user type has changed |
|  | RevertCnfmtnMsg | On clicking OK, requests will be reverted back to the previous version by system admin from the application front-end to take action.  Are you sure you want to proceed? | Maximum number of request can be cancelled from the transition job. after this status will be changed to "To Be Cancelled" and requires admin approval |
|  | RevertPreviousVersionComment | Updated by System Admin from the TobeCancelledBeneficiaries Page | this is a message present in the pop up on click of Approve cancellation button in to be cancelled beneficiaries page |
|  | RevertPreviousVersionFaldMsg | Revert Operation failed for itemId ITEMID | alert message |
|  | RevertPreviousVersionSuccessMsg | Stipend for selected beneficiaries have been reverted back Successfully. | Success message alert in to be cancelled beneficiaries page |

##### Policy Configuration

**List name :** Policy Configuration

**Description :** Policy Configuration List is created for storing the Policy documents links. These document are stored based on country, role and policy type.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **DS ID** | **Column Name** | **Data Type** | **Choice Options/Look up Details** | **Description** |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Policy Document Url | Hyperlink |  | Link url for Policy Document |
|  | Active | yes/no |  | Only Active url will be filtered in the application |
|  | Country | Lookup | Look up from Countries list Title Column | Based on country Policy document will be selected. |
|  | Policy Type | Choice | Enrollment  Cancel | Based on Policy Type Policy document will be selected. |
|  | Role | Multi select | FTE  Contractor  Remote Fulltime  Remote Contractor | Based on Role Policy document will be selected. |
|  | TnCPolicyContent | Multiline of select |  | Terms and condition text to be displayed on the enroll screen |

##### Mobile Device Plan Configuration List

**List name :** Mobile Device Plan Configuration List

**Description :** Mobile Device Plan Configuration List is a master List for the stipend configuration. These values are based on the country and can be changed by system admin.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **DS ID** | **Column Name** | **Data Type** | **Choice Options/Look up Details** | **Description** |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Stipend Category | Choice | Occasional Usage  Standard Usage  High Usage  Field Employees  Remote Employee | Stipend Category for the policy configuration |
|  | Stipend Description | Multiline of Text |  | Description of the Stipend category |
|  | Monthly Amount | Single line of text |  | Amount for the Stipend category. |
|  | Country | Lookup | Look up from Countries list Title Column | Set Country title lookup to the stipend details |
|  | Country:Currency | Lookup | Look up from Countries list Currency Column | Set Country Currency lookup to the stipend details |
|  | Active | yes/no |  | Only Active records will be filtered in the application |
|  | BeneficiaryType | Choice | Fulltime  Remote Fulltime | Beneficiary type for filtering the stipend amount for remote and fulltime user |

##### Stipend Request

**List name :** Stipend Request

**Description :** Stipend Request list is to store the request submitted in the system.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **DS ID** | **Column Name** | **Data Type** | **Choice Options/Look up Details** | **Description** |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Beneficiary | Person |  | Beneficiary for which request is created |
|  | Beneficiary Type | Choice | Fulltime  Contractor  Remote Fulltime  Remote Contractor | Type of Beneficiary either Fulltime or Contractor |
|  | Beneficiary Job Grade | Single line of Text |  | Job grade of the beneficiary and will be filled from AD |
|  | Beneficiary Department | Single line of Text |  | Department of the beneficiary and will be filled from AD |
|  | Beneficiary Current Country | lookup | Look up from Countries list Title Column | Current Country of the beneficiary, will be filled from AD |
|  | Beneficiary Current Country:Currency | lookup | Look up from Countries list Currency Column | Current user country currency of the beneficiary, will be filled from AD |
|  | Stipend Category | Single line of Text |  | Stipend Category for the request. This will be selected value from the enrollment form. And will be blank in case of Contractor |
|  | Stipend Amount | Number |  | Stipend Amount for the request. This will be selected value from the enrollment form. And will be blank in case of Contractor |
|  | Agreement Accepted | yes/no |  | Should be Yes for the request submitted |
|  | Request Date | Date & Time |  | Date on which Request is submitted |
|  | Complete Stipend Amount | Single line of Text |  | Complete the Stipend amount with currency value |
|  | Request Type | Choice | Enroll  Update  Cancel  Re-Enroll | For what request is submitted. |
|  | Requester | Person |  | Person value Who has submitted the request |
|  | Status | Choice | In-Progress  Approved  Rejected  Cancelled  Pre-Approved  Auto-Approved  Expired  Left Gilead  To be Cancelled | Current status of the Request. |
|  | Is Active | yes/no |  | If request is Active or not. All deleted Request will be having value as No |
|  | Approval Reject Date | Date & Time |  | Date on which Request is approved or reject in the system |
|  | Manager | Person |  | Line manager of the beneficiary |
|  | Reviewer | Person |  | Line manager of the beneficiary |
|  | Policy Document Url | Person |  | Policy Url for the Agreed TnC |
|  | Policy Name | Single line of Text |  | Policy document name for the Agreed TnC |
|  | Comments | Multiline of Text |  | Approval/reject Comments if any |
|  | Agreement Accepted Date | Date & Time |  | Agreement accepted Date and time |
|  | Complete Stipend Amount | Single line of Text |  | Complete stipend amount with currency |
|  | AD\_Path | Single line of text |  | Active directory path of the user |
|  | Approval Email Sent | Yes/No |  | To check if approval mail is sent for approved users |
|  | Complete Stipend Amount | Single line of text |  | Complete stipend amount |
|  | IsRemoteWorker | Yes/No |  | Yes if user is remote worker  No if user is not remote worker |
|  | User Principal Name | Single line of text |  | User principal name of the user retrieved from user profile |
|  | Beneficiary Country Name | Single line of text |  | Beneficiary country name |
|  | NewTnCsNotfcatn  Sent | Single line of text |  | Set to Yes if beneficiary is sent email to update new T and C |
|  | NewTnCsNotfcatn  SentDate | Date and time |  | Date when email sent to update new T and C |
|  | AllReviewers | Multi line of text |  | To store all reviewers for multi-level approval |
|  | NextReviewer | Person |  | Store Next Reviewer information for multi-level |

##### Email Templates

**List name :** Email Templates

**Description :** Email template is for storing the email templates to be sent in the system**.**

|  |  |  |  |
| --- | --- | --- | --- |
| **DS ID** | **Column Name** | **Data Type** | **Description** |

|  |  |  |  |
| --- | --- | --- | --- |
|  | Email Subject | Single line of text | Email subject for the mail being sent |
|  | Email Body | Multiline of text | Email body for the mail being sent |
|  | Notification Type | Single line of text | Notification Type is the filter condition. Mail template will be selected based on it. |
|  | CC | Single line of text | Cc for the email being sent |
|  | To | Single line of text | To whom mail should be sent |
|  | Template Name | Single line of text | Name of the template |
|  | Description | Multiline of text | Description of the email template to be used in the application |
|  | Country | Lookup | Look up from Countries list Title Column |

#### Document Library

##### Payroll Reports Document Library

**Library name:** Payroll Reports Document Library

**Description:** This library is to hold the payroll reports. Reports will be stored in this library based on Country year and month of generation.

|  |  |  |  |
| --- | --- | --- | --- |
| **DS ID** | **Column Name** | **Data Type** | **Description** |

|  |  |  |  |
| --- | --- | --- | --- |
|  | Country | Folder | Country named folder. This will be created one time for all the possible countries available in the system and will be used to filter the payroll report |
|  | Month | Single line of text | Month name for which report is being generated |
|  | Year | Single line of text | Year value for which report is being generated |

##### Payroll report will have following excel format.

| **DS ID** | **Description** |
| --- | --- |
|  | Pay roll report excel will have the following columns:   1. Co Code 2. Batch ID 3. File # 4. Earnings 4 Code 5. Currency 6. Earnings 4 Amount 7. Pay # 8. Tax Frequency |
|  | Within the excel report there can be multiple sheets present and payroll records will present defined by the following logic:  Users having Legal\_Entity = '001' and HREmployeeNumber in (151568,152405,201538,205786) THEN Sheet Name is 'QWM'  WHEN Legal\_Entity = '001' THEN Sheet Name is 'QWK'  WHEN Legal\_Entity = '006' THEN Sheet Name is 'TQU'  WHEN Legal\_Entity = '007' THEN Sheet Name is 'UNX' |
|  | For all the records “Co Code” field will be populated using the following logic  Users having Legal\_Entity = '001' and HREmployeeNumber in (151568,152405,201538,205786) THEN Sheet Name is 'QWM'  WHEN Legal\_Entity = '001' THEN Co Code is 'QWK'  WHEN Legal\_Entity = '006' THEN Co Code is 'TQU'  WHEN Legal\_Entity = '007' THEN Co Code is 'UNX' |
|  | For all records “Batch ID” column will have the value “Stipend” |
|  | Approval date should be less than first Monday of the month |
|  | For all records “Earnings 4 Code” column will have the value “CEL” |
|  | For all records “Tax Frequency” column will have the value “B” |
|  | For all records “Pay#” column will have the value “1” |
|  | For rest of the records population refer section |

## Webparts

### Summary

| **DS ID** | **Webpart name** | **Description** |
| --- | --- | --- |
|  | ESRATopNavigation | To display the top navigation.  Fetch the navigation links from global navigation and display them as per the current user. |
|  | ESRABenefeciaryWelcomeDetail | To display the welcome message based on the current user country and Employee type.  Fetch the Message from Application Configuration List. |
|  | ESRABenefeciaryDetail | This web part allow user to create the request. Based on the beneficiary country and request type, stipend category/amount from Mobile Device Plan Configuration List will be displayed.  User has to select the required option and has to agree for the agreement.  On click of Enrollment Request button the details will be saved in Stipend Request list. An email will be sent to manager for further action on the request.  Pre-Approved records user has to check terms and condition check for the request to be approved |
|  | ESRAPendingRequests | Display all the pending request for the managers. Allow manager to approve reject the request |
|  | ESRACompletedRequests | Display all the completed requests. Allow managers to export the requests in excel format. |
|  | ESRAPreApprovedRequests | Display all the Pre-Approved requests. Can also export the requests in excel format. |
|  | ESRAReportTabs | Reports tab landing page. This will have separate tab for the different reports navigating to the report page. |
|  | ESRAPayrolReport | Allow power user to get the payroll report. Power user must select the country and Year/Month to get the report.  Reports are saved in Payroll Report Document Library and will be downloaded as per the request raised by power user. |
|  | ESRAEnrollmentReport | Display all the In-progress/Approved/Auto-Approved request in the system Also power user can filter by country |
|  | ESRASettingTabs | Landing page to the settings page. This webpart will have different tabs for setting options for Power user navigating to the page. |
|  | ESRAManagePowerUsers | Display all the power users in the system. Allow user to add and delete the power user in the system.  Power users are stored in a SharePoint group this webpart will allow to add/delete user from SharePoint group |
|  | ESRAManagePendingRequests | Display all the pending request in the system which is pending to any manager/reviewer. Power user will have access to these requests and can approve/reject the single/multiple requests. |
|  | ESRAManageRequests | Display all the approved requests. Webpart allow Power user to cancel the request. Webpart also allow power user to view version history. |
|  | ESRARequestOnBehalf | This web part allow power user to create the request on behalf of other Beneficiary. Power user will select the beneficiary from uers control and displplay the stipend category/amount from Mobile Device Plan Configuration List.  On selecting the required option the details will be saved in Stipend Request with status pre-approved and send email to beneficiary for agreement. |
|  | ESRAExportGroupUsers | Allow power user to get the users from the group selected from the drop down  Also can selected stipend request list to export the stipend requests. |
|  | ESRAPowerUserCompletedRequests | Display all the completed requests. Can also export the requests in excel format.  Power user can filter by country |
|  | ESRAPowerUserPendingRequests | Display all the pending request in the system which is pending to any manager/reviewer. Power user will have access to these requests and can approve/reject the single requests.  Also power user can filter by country |
|  | ESRAStipendSummary | Display all the In-progress and Approved request for the manager  Manager can filter based on the country to get summary of Stiped amounts for In-Progress and Approved records |
|  | ESRAApproverUpdate | Display all the In-Progress requests for the manager selected using people picker and updates the approver to new approver that is provided in the new approver people picker control |
|  | ESRAToBeCanclledRequets | Display all the To be cancelled requests in the system. Admin user will have access to these requests and can approve/reject the single or all requests at a time. |

### Detailed Description

#### Global Navigation

Solution Name: ESRATopNavigation

Webpart Name: ESRATopNavigation

| **DS ID** | **Event** | **Description** |
| --- | --- | --- |
|  | **Source** | Global Navigation |
|  | **OnLoad** | Check if User location is from Allowed countries from countries list.  If No message will be displayed  Please note that this is only for allowed countries employees. Employee Stipend request application is not yet live in your country. Please raise a SPARC if you have any queries. |
|  | **OnLoad** | Check if user FTE/Contractor: check if user is FTE/Contractor based user profile property.  **If FTE and Power User**  use site navigation to Show following.  Overview | Enroll | Approve/Reject | Reports | Settings |Stipend Summary |
|  | **OnLoad** | **If Contractor and Power User**  use site navigation to Show following.  Overview | Enroll | Reports | Settings |
|  | **OnLoad** | Check if user FTE/Contractor: check if user is FTE/Contractor based user profile property.  **If FTE and Payroll user**  use site navigation to Show following.  Overview | Enroll | Approve/Reject | Reports |Stipend Summary |
|  | **OnLoad** | **If Contractor and Payroll user**  use site navigation to Show following.  Overview | Enroll | Reports |
|  | **OnLoad** | **If FTE**  use site navigation to Show following.  Overview | Enroll | Approve/Reject |Stipend Summary |
|  | **OnLoad** | **If Contractor**  use site navigation to Show following.  Overview | Enroll |

#### Stipend Enrollment Screen

##### Solution Name: ESRAEnrollement

Webpart Name: ESRABenefeciaryWelcomeDetail

| **DS ID** | **Event** | **Description** |
| --- | --- | --- |
|  | **Source** | Application Configuration list |
|  | **OnLoad** | Display the current user display name. |
|  | **OnLoad** | Based on the current user “country” and User type i.e., FTE/Contractor/Remote Fulltime system will pull content from application configuration list to be displayed  **Application Configuration list**  **Fields**  Key: “BasicStipendInfo”  Value: Value Column  Country: Current user country  Role: FTE/Contractor/Remote Fulltime |

##### Solution Name: ESRAEnrolledAddUpdateStipendDetail

Webpart Name: ESRABenefeciaryDetail

| **DS ID** | **Event** | **Description** |
| --- | --- | --- |
|  | **Source** | Stipend Request, Mobile Device Plan Configuration, Policy Configuration, Email Templates |
|  | **onLoad** | If there are no pending/approved request for the current user in the Stipend Request list, then system will check if the current user is Full time /contractor employee.  getting current **User profile** information. |
|  | **onLoad** | If the user is Full time employee, Grid will be displayed with the stipend information pulled from Mobile Device Plan Configuration list based on the current user country and link to Terms & condition will be displayed.  **Mobile Device Plan Configuration** **list**  **Fields**  Stipend Category  Stipend Description  Stipend Amount |
|  | **OnLoad** | If the user is Contractor, link to Terms & condition will be displayed.  Terms & condition will be displayed based on the current user country, active, Role and Policy Type  Terms and Condition text is fetched from the Policy Configuration list and displayed to the user on the screen |
|  | **onLoad** | If the user is Remote Full-time employee, Grid will be displayed with the stipend information pulled from Mobile Device Plan Configuration list based on the current user country and link to Terms & condition will be displayed.  **Mobile Device Plan Configuration** **list**  **Fields**  Stipend Category  Stipend Description  Stipend Amount |
|  | **OnLoad** | Check if there are active Pending/Approved/Pre-Approved request for the current user in Stipend Request list  **Stipend Request List:** Filter list based on the Beneficiary=” current user” & Status=” In-Progress/Auto-Approved/Approved/Pre-Approved “& IsActive=” true” |
|  | **OnLoad** | If there is any then the stipend request information will be displayed with option to Cancel/Update  **Stipend Request List:**  Beneficiary  Manager  Stipend Amount  Request Status  Request Date &Time |
|  | **OnLoad** | **Request History**  Show the version history data for selected beneficiary.   * 1. List name: Stipend Request   2. Filter condition: Item = Clicked item in grid and if item current version have status as “In progress” hide this version   3. **Column to be shown in Grid:** Requestor, Requestor Type, Date requested, Status Reviewer, Date Approved /rejected, Policy umber, Category , Monthly Stipend, Agreement Accepted Date, Comments |
|  | **Ok Click** | Close the version history popup |
|  | **Form Submit Controls** | **Mobile Device Policy link**  If user is Full time employee must Select on the Stipend category from the grid and enable the check box to “Acknowledge Mobile Device Policy and Terms & Conditions” and click on the link for the pop up to appear with the link tp Gvault document |
|  | **Form Submit Controls** | Link to Terms & condition will be displayed based on the current user country, active status, Role, Policy Type.  **Policy Configuration list**  **Fields**  PolicyDocumentUrl  Country  Role  Policy Type  TnCPolicyContent |
|  | **Form Submit Controls** | If user is contractor enable the check box to “Acknowledge Mobile Device Policy and Terms & Conditions” and click on the link for the pop up to appear with the link tp Gvault document |
|  | **Form Submit Controls** | Link to Terms & condition will be displayed based on the current user country, active, Role ,Policy Type.  **Policy Configuration list**  **Fields**  PolicyDocumentUrl  Country  Role  Policy Type  TnCPolicyContent |
|  | **Form Submit Controls** | **Mobile Device Policy link**  If user is Remote Full time employee must Select on the Stipend category from the grid and enable the check box to “Acknowledge Mobile Device Policy and Terms & Conditions” and click on the link for the pop up to appear with the link tp Gvault document |
|  | **Form Submit Controls** | Link to Terms & condition will be displayed based on the current user country, active status, Role ,Policy Type.  **Policy Configuration list**  **Fields**  PolicyDocumentUrl  Country  Role  Policy Type  TnCPolicyContent |
|  | **Request Enrollment Submit** | **Validation check:**  System will check if the user has selected one of the stipend categories and user has to check the checkbox if not a Request Enrollment button will be disabled. |
|  | **Request Enrollment Submit** | **Stipend Enrollment**  Once user click on Request enrollment the system will store all the user related data,  **Stipend Request list**  **Fields**   |  | | --- | | Beneficiary =Current user | | Beneficiary Type=fulltime/contractor | | Beneficiary Job Grade=Current user profile | | Beneficiary Department= Current user profile | | Beneficiary Home Country= Current user profile | | Beneficiary Current Country= Current user profile | | Beneficiary Current Country: Currency= Currency of the current user | | Stipend Category=user selection | | Stipend Amount= user selection | | Agreement Accepted= user selection | | Request Date=Current Date | | Request Type=Enrollment | | IsActive=yes  Status=In progress | | Agreement Accepted Date: Date & time when user click on check box | | Complete Stipend Amount: Complete stipend amount with currency | | Reviewer=Current User manager based on User profile property | | Manager= Current User manager based on User profile property | | PolicyDocumentUrl=based on current user country-based policy  AD\_path=Current user AD path  IsRemoteWorker=Set to Yes if user is remote worker  UserPrincipalName=UPN retrieved from user profile property | |
|  | **Request Enrollment Submit** | Grid will be displayed with stipend pending request details that user has selected.  **Stipend Request List**  **Fields**  Beneficiary  Manager  Stipend Amount  Request Status  Request Date &Time |
|  | **Request Enrollment Submit** | Sending notification  If (Status=Auto-Approved)  Filter: Notification Type= ‘Auto-Approved’  **Email Templates:**  **Fields:**  Email Subject  Email Body  TO  CC |
|  | **Request Enrollment Submit** | Sending notification  If (Status=In-Progress)  Filter: Notification Type= ‘NewRequest’ and ‘NewRequestToReviewer’  **Email Templates:**  **Fields:**  Email Subject  Email Body  TO  CC |
|  | **Update Request** | On clicking the update request the user will be provided with stipend information grid to change the stipend category and “Read and Understand Mobile Device Policy” link will be visible user click on pop up with Gvault link to document and user has to check the checkbox to the terms and condition before enrolling for the update stipend.  **Mobile Device Plan Configuration** **list**  **Fields**  Stipend Category  Stipend Description  Stipend Amount |
|  | **Update Request** | System will update record in the stipend Request list with the new selected category and Terms and condition and send notification to the Manager.  **Stipend Request list**  **Fields**   |  | | --- | | Stipend Category=User selection | | Stipend Amount=User Selection | | Request Date=Current date  Complete Stipend Amount: Update amount with currency  Agreement Accepted Date: Date and time when user click on the checkbox | | Request Type=Update | | Status=In progress | | PolicyDocumentUrl= based on current user country-based policy | |
|  | **Cancel Request** | On clicking the Cancel request a pop up appears with a message about request being cancelled. |
|  | **Cancel Request** | System will update status of the record and make the request inactive.  **Stipend Request list**  **Fields**   |  | | --- | | Request Date=Current Date | | IsActive=No | | Status=Cancelled | | Comments=user input | |
|  | **Cancel Request** | User will be displayed the stipend information grid if you are the full-time employee and Terms and condition link.  **Mobile Device Plan Configuration** **list**  **Fields**  Stipend Category  Stipend Description  Stipend Amount |
|  | **Re-Enroll Request** | If the Request status is ‘Approved/Auto-Approved’ and Date reviewed is 22months from the current date then Re-Enroll button will be displayed rather than Update Request |
|  | **Re-Enroll Request** | On clicking the Re-Enroll request the user will be provided with stipend information grid to change the stipend category and “Read and Understand Mobile Device Policy” link will be visible user click on pop up with Gvault link to document and user has to check the checkbox to the terms and condition before enrolling for the update stipend.  **Mobile Device Plan Configuration** **list**  **Fields**  Stipend Category  Stipend Description  Stipend Amount |
|  | **Re-Enroll Request** | System will update record in the stipend Request list with the new selected category and Terms and condition and send notification to the Manager.  **Stipend Request list**  **Fields**   |  | | --- | | Stipend Category=User selection | | Stipend Amount=User Selection | | Request Date=Current date  Complete Stipend Amount: Update amount with currency  Agreement Accepted Date: Date and time when user click on the checkbox | | Request Type=Update | | Status=In progress | | PolicyDocumentUrl= based on current user country based policy  Notification is sent to line manager for approval | |
|  | **New TandC update** | If the NewTnCsNotfcatnSent flag is to ‘Yes’ then beneficiary will see the “Read and Understand Mobile Device Policy” Check box to for the new T and C policy link to accept |
|  | **New TandC update** | System will update record in the stipend Request list with the new T and c link and agreement accept date updated to the current date and set NewTnCsNotfcatnSent to “No’  **Stipend Request list**  **Fields**   |  | | --- | | Agreement Accepted Date: Date and time when user click on the checkbox | | NewTnCsNotfcatnSent =No | | PolicyDocumentUrl= based on current user country-based policy | |

#### Approve/Reject Screen

##### Solution Name: ESRAPendingRequest

Webpart Name: ESRAPendingRequests

| **DS ID** | | **Description** | | |
| --- | --- | --- | --- | --- |
|  | | **Source** | Stipend Request, Application Configuration, Email Templates, Countries | |
|  | | **OnLoad** | 1. Load grid data with following:  * **List name**: Stipend Request * **Filter condition**: Status = In progress and NextReviewer = Current user * **Column to be shown in Grid**: Beneficiary, Stipend Type, Request Date, Beneficiary Department | |
|  | | **Approve Click** | Validation**:**  At least 1 request should be selected.  if not: print validation message | |
|  | | **Approve click** | | Update the Selected items in Stipend list if the Approvaltype is Default from Countries list   * Status to Approved. * Approval Reject Date to today date. * Rebind the grid. |
|  | | **Multi-Level Approve click** | | Update the Selected items in Stipend list if the Approvaltype is Power user from Countries list and check number of levels  Based on levels first approver will be beneficiary’s LineManager and next level approvers will be defined on the countries list in the Approvers column   * Status to In-Progress * NextReviewer will be assigned based on the reviewer from countries list * Rebind the grid.   Notifications will be sent to next approver |
|  | | **Multi-Level Approve click** | | Update the Selected items in Stipend list if the Approvaltype is Source from ad from Countries list and also number of levels  Based on levels first approver will be beneficiary’s LineManager and next level approvers will be defined on the countries list in the Approvers column   * Status to In-Progress * NextReviewer will be assigned based on the reviewer from countries list * Rebind the grid.   Notifications will be sent to next approver |
|  | | **Multi-Level Approve click** | | Once all the approvers are approved update the Selected items in Stipend list   * Status to Approved. * Approval Reject Date to today date. * Rebind the grid. |
|  | | **Reject Click** | | Validation**:**  At least 1 request should be selected.  if not: print validation message |
|  | | **Reject Click** | | Open a popup for comments |
|  | | **Submit click on Modal Popup** | | Update the Selected items in Stipend list with   * Status to Reject. * Approval Reject Date to today date. * Comments to User comments * Send mail to Beneficiary. * Close the popup. * Rebind the grid |
|  | | **Submit click on Modal Popup** | | If the user has previous approved version in version history then system we will revert the item back to previous approved version |
|  | | **Submit click on Modal Popup** | | If user doesn’t have any previous approved version then request will be rejected status |
|  | | **Submit click on Modal Popup on Re-Enroll Request** | | If Request type is ‘Re-Enroll’ then request will in rejected status |

##### Solution Name: ESRAPreApprovedRequests

Webpart Name: ESRAPreApprovedRequests

| **DS ID** | **Event** | **Description** |
| --- | --- | --- |
|  | **Source** | Stipend Request, Application Configuration |
|  | **OnLoad** | 1. Load grid data with following:  * **List name**: Stipend Request * **Filter condition**: Status= Pre-Approved and Request type = Enrolled and NextReviewer = Current user * **Column to be shown in Grid:** Column to be shown in Grid: Beneficiary, Requestor, Stipend Type, date Requested, Department |
|  | **Webpart Actions - Export to Excel** | Export the grid data in excel format with following columns: Beneficiary, Requestor, Stipend Type, date Requested, Department |

##### Solution Name: ESRACompletedRequests

Webpart Name: ESRACompletedRequests

| **DS ID** | **Event** | **Description** |
| --- | --- | --- |
|  | **Source** | Stipend Request, Application Configuration |
|  | **OnLoad** | 1. Load grid data with following:  * **List name**: Stipend Request * **Filter condition**: Status= Approved/Rejected and Request type = Enrolled and NextReviewer = Current user * **Column to be shown in Grid:** Column to be shown in Grid: Beneficiary, Stipend Type, date Approved /Rejected Status, Department History |
|  | **Webpart Actions - Export to Excel** | Export the grid data in excel format with following columns: Beneficiary, Stipend Type, date Approved /Rejected Status, Department |
|  | **Click -Request Version History** | 1. Show the version history data for selected beneficiary.  * List name: Stipend Request * Filter condition: Item = Clicked item in grid and if item current version have status as “In progress” hide this version * Column to be shown in Grid: Requestor, Requestor Type, Date requested, Status Reviewer, Date Approved /rejected, Policy umber ,Category , Monthly Stipend , Agreement Accepted Date ,Comments |
|  | **Ok Click -Request Version History** | Close the version history popup |

#### Reports Screen

##### Solution Name: ESRAReports

Webpart Name: ESRAReportTabs

| **DS ID** | **Event** | **Description** |
| --- | --- | --- |
|  | **OnLoad** | if the current user is part of Power user Group  Both Enrollment report and Payroll report tabs will be visible  if the current user is part of Payroll Group  Payroll report tab will be visible. |
|  | **Webpart Actions**  Click on tabs | Navigate to the link url |

##### Solution Name: ESRAPayrolReport

Webpart Name; ESRAPayrolReport

| **DS ID** | **Event** | **Description** |
| --- | --- | --- |
|  | **OnLoad** | Load webpart content as  Country:  **List Name**: Countries  **Value**: Title column  Calendar Control with month/year |
|  | **OnLoad** | Get the file from following Location:   1. **Document Library name**: Payroll Reports 2. **Filter condition**: Folder = Country Selected and Year = year Selected and Month =Month Selected |
|  | **Validation check** | Download button will enabled only if the user selects Country and Month /Year  If not, it will be disabled |
|  | **Validation check** | If user selects future month, then a  Validation message will be displayed |
|  | **Webpart Actions Download** | User should be able to download the file |
|  | **Webpart Actions Download** | If there is no report of the selected month/year  No Report found Message will be displayed to the user |

#### Settings Screen

Solution Name: ESRASettings

Webpart Name: ESRASettingTabs

| **DS ID** | **Event** | **Description** |
| --- | --- | --- |
|  | **OnLoad** | Tabs with different sections will be displayed.  If Current user is System admin, then all the tabs will be visible  If Current user is Power User, then these 3 tabs will be visible   * Pending Request * Request on behalf of * Bulk Upload   If Current user is Power User, then Configuration sections will not be visible  Configuration   * Add Countries in the program * Welcome Message * Error Message * Popup Messages * Helper Message * Success Message * Scheduled Job * User Property Values * APICallData * Update Stipend Amount * Update Terms & Conditions * Update Email Templates * Manage Power Users * Manage Request * Export Users |
|  |  |  |
|  | **Webpart Actions - Click on tabs** | Navigate to the link url |

#### Manage Power Users Screen

Solution Name: ESRAManagePowerUsers

Webpart Name: ESRAManagePowerUsers

| **DS ID** | **Event** | **Description** |
| --- | --- | --- |
|  | **Source** | Stipend Request, Application Configuration |
|  | **OnLoad** | Load webpart content with following details:   * **Group name**: Power User group * **Column to be shown in Grid**: Email and Display Name |
|  | **Webpart Actions**  **Add click** | Validation**:**  validate people picker with empty value if yes show validation message |
|  | **Add click** | check if user is already existing in the group. |
|  | **Add click** | if yes show message user already exists |
|  | **Add click** | Add user in the Group.  Re-bind the grid. |
|  | **Delete Click** | Validation**:**  Confirm: "Are you sure to delete the user" |
|  | **Delete Click** | Close: Close the confirmation box |
|  | **Delete Click** | Delete the user from group.  Rebind the grid |

#### Poweruser Pending Requests Screen

##### Solution Name: ESRAPowerUserPendingRequests

Webpart Name: ESRAPowerUserPendingRequests

| **DS ID** | **Event** | **Description** |
| --- | --- | --- |
|  | **Source** | Stipend Request, Application Configuration, Email Templates |
|  | **OnLoad** | Load grid data with following:   * 1. **List name**: Stipend Request   2. **Filter condition**: Status = In progress and Request type = Enrolled   3. **Column to be shown in Grid**: Beneficiary, Stipend Type, Request Date, Reviewer, Department   4. **Dropdown with countries** |
|  | **Filter** | Power user can filter the data in the grid based on the country selected from the dropdown |
|  | **Webpart Actions**  **Approve Click** | Validation**:**  At least 1 request should be selected.  if not: print validation message |
|  | **Approve Click** | Update the Selected items in Stipend list with   * Status to Approved. * Approval Reject Date to today date. * Reviewer: Current user * Rebind the grid. |
|  | **Reject Click** | Validation**:**  At least 1 request should be selected.  if not: print validation message |
|  | **Reject Click** | Open a popup for comments: |
|  | **Submit click on popup** | Update the Selected items in Stipend list with   * Status to **Rejected**. * Approval Reject Date to today date. * Comments to User comments * Reviewer: Current user * Send mail to Beneficiary. * Close the popup. |
|  | **Submit click on popup** | Rebind the grid. |
|  | **Export to Excel** | Export the grid data in excel format with following columns: Beneficiary, Stipend Type, Date Requested , Reviewer,Department |

##### Solution Name: ESRACompletedRequests

Webpart Name: ESRACompletedRequests

| **DS ID** | **Event** | **Description** |
| --- | --- | --- |
|  | **Source** | Stipend Request, Application Configuration |
|  | **OnLoad** | 1. Load grid data with following:  * **List name**: Stipend Request * **Filter condition**: Status= Approved/Rejected and Request type = Enrolled * **Column to be shown in Grid:** Column to be shown in Grid: Beneficiary, Stipend Type, date Approved /Rejected Status, Department History |
|  | **Webpart Actions - Export to Excel** | Export the grid data in excel format with following columns: Beneficiary, Stipend Type, date Approved /Rejected Status, Department |
|  | **Click -Request Version History** | 1. Show the version history data for selected beneficiary.  * List name: Stipend Request * Filter condition: Item = Clicked item in grid and if item current version have status as “In progress” hide this version * Column to be shown in Grid: Requestor, Requestor Type, Date requested, Status Reviewer, Date Approved /rejected, Policy umber ,Category , Monthly Stipend , Agreement Accepted Date ,Comments |
|  | **Ok Click -Request Version History** | Close the version history popup |

#### Manage Requests Screen

Solution Name: ESRAManageRequests

Webpart Name: ESRAManageRequests

| **DS ID** | **Event** | **Description** |
| --- | --- | --- |
|  | **Source** | Application Configuration, Stipend Request |
|  | **OnLoad** | Load grid data with following:   * 1. **List name**: Stipend Request   2. **Filter condition**: Status = Approved or Auto Approved and Request type = Enrolled   3. **Column to be shown in Grid**: Beneficiary, Approval Reject Date, Policy Number |
|  | **Webpart Actions**  **Opt-Out/Cancel Click** | Open a popup for comments |
|  | **Close click on the popup** | Close the popup. |
|  | **Ok click on the popup** | Update the Selected items in Stipend list with   * Status to Cancelled. * Approval Reject Date to today date. * Comments to User comments * Send mail to Beneficiary. * Close the popup. * Rebind the grid. |
|  | **Click Request Version History** | Show the version history data for selected beneficiary.   1. **List name:** Stipend Request 2. **Filter condition:** Item = Clicked item in grid and if item current version have status as “In progress” hide this version 3. **Column to be shown in Grid:** Requestor, Requestor Type, Date requested, Status Reviewer, Date Approved /rejected, Policy umber ,Category , Monthly Stipend ,Comments |
|  | **Ok Click on Request Version History** | Close the version history popup. |
|  | **Search Click** | Check if search string is not empty. |
|  | **Search Click** | Filter grid data based on Following columns:   1. Beneficiary, Date approved, Policy number. |

#### RequestOnBehalf Screen

Solution Name: ESRARequestOnBehalf Solution

Webpart Name: ESRARequestOnBehalf Webpart

| **DS ID** | **Event** | **Description** |
| --- | --- | --- |
|  | **Source** | Stipend Request, Mobile Device Plan Configuration, Email Templates |
|  | **OnLoad** | Power user will be provided with People picker control to select a beneficiary for stipend request. |
|  | **Beneficiary Select** | Check if the selected Beneficiary is from allowed countries.  If not exception message |
|  | **Beneficiary Select** | if the beneficiary is a full-time employee  then Stipend Grid will be displayed  else  Submit button will be displayed |
|  | **Submit Click** | **Validation check:**  If Fulltime employee  System will check if the user has selected one of the stipend categories  if not, a Request Enrollment button will be disabled. |
|  | **Submit Click** | Once user click on Submit button, the system will store all the stipend related data,  **Stipend Request list**  **Fields**   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  | | --- | | Beneficiary=user selected from people picker | | Beneficiary Type=full time/contractor | | Beneficiary Job Grade= user selected profile information | | Beneficiary Department= user selected profile information | | Beneficiary Home Country= user selected profile information | | Beneficiary Current Country= user selected profile information  Beneficiary Current Country: Currency= Currency of the current user | | Stipend Category= user selection | | Stipend Amount= user selection | | Request Date=current date | | Request Type=enrollment | | Requestor=Power user | | Status=Pre-Approve | | IsActive=Yes | | Agreement Accepted Date: Date & time when user click on check box | | Complete Stipend Amount=Complete stipend amount with Currency | | Approval Reject Date=Current Date  Reviewer = Power user  AD\_path=AD path for user | | |
|  | **Submit Click** | Send mail to Beneficiary with link to T&C check.  **Email Templates:**  **Fields:**  Email Subject  Email Body  CC |
|  | **Submit Click** | Power user will be redirected to Manage request screen and notification will be sent to the beneficiary |
|  | **Beneficiary Email** | Notification will be sent to Beneficiary with a link to Terms and conditions.  Once User Click link a Popup window with Gvault document |
|  | **Beneficiary Enroll** | Once User Click link a Popup window with Gvault document open up |
|  | **Beneficiary**  **Enroll** | Once user checks the checkbox the request status is set to “Approved”  and updated AgreementAccepteddate to Current date |

#### BulkUpload Screen

Solution Name: ESRACreateBulkStipends Solution

Webpart Name: ESRACreateBulkStipends Webpart

| **DS ID** | **Event** | **Description** |
| --- | --- | --- |
|  | **Source** | Stipend Request, Mobile Device Plan Configuration, Email Templates |
|  | **OnLoad** | Power user will be provided with Option to upload excel file with multiple beneficiaries for stipend request |
|  | **Upload Excel** | Poweruser can create bulk requests at a time by uploading excel with beneficiary details  **Excel Columns:**  Beneficiary  Beneficiary Type  Email  Stipend Amount |
|  | **Upload check** | System will process each request check for validations like  Beneficiary email is valid  Beneficiary type is Fulltime and Stipend amount is Empty  Beneficiary type is Contractor and Stipend amount is added  Valid stipend amount based on the beneficiary country |
|  | **Upload check** | All those requests failed in the validation will not be processed |
|  | **Upload Click** | **Stipend Request list**  **Fields**   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  | | --- | | Beneficiary=user selected from people picker | | Beneficiary Type=full time/contractor | | Beneficiary Job Grade= user selected profile information | | Beneficiary Department= user selected profile information | | Beneficiary Home Country= user selected profile information | | Beneficiary Current Country= user selected profile information  Beneficiary Current Country: Currency= Currency of the current user | | Stipend Category= user selection | | Stipend Amount= user selection | | Request Date=current date | | Request Type=enrollment | | Requestor=Power user | | Status=Pre-Approve | | IsActive=Yes | | Agreement Accepted Date: Date & time when user click on check box | | Complete Stipend Amount=Complete stipend amount with Currency | | Approval Reject Date=Current Date  Reviewer = Power user  AD\_path=AD path for user  isRemoteworker=yes if user is remote worker  User Principal name =UPN based on the user profile property | | |
|  | **Upload Click** | Send mail to Beneficiary with link to T&C check.  **Email Templates:**  **Fields:**  Email Subject  Email Body  CC |
|  | **Upload Click** | Grid will be displayed with all requests with the Status “Success/fail”  For Failed requests comments are added in the grid  **Grid Columns:**  Beneficiary  Email  Beneficiary Type  Stipend Amount  Country  Status  Comments |
|  | **Beneficiary Email** | Notification will be sent to Beneficiary with a link to Terms and conditions.  Once User Click link a Popup window with Gvault document |
|  | **Beneficiary Enroll** | Once User Click link a Popup window with Gvault document open up |
|  | **Beneficiary**  **Enroll** | Once user checks the checkbox the request status is set to “Approved”  and updated AgreementAccepteddate to Current date |

#### Manage Approvals Screen

Solution Name: ESRAManageApprovals Solution

Webpart Name: ESRAManageApprovals Webpart

| **DS ID** | **Event** | **Description** |
| --- | --- | --- |
|  | **Source** | Countries list |
|  | **OnLoad** | System Admin have option to set multi-level approval for a country  Countries dropdown will be loaded |
|  | **On dropdown Select** | Once Country is selected from dropdown list  Three options set will be displayed   * Default * Power user defined * Source from AD |
|  | **Default radio button Select and save click** | Once user select Default and save it  Selected country will be updated with Approvaltype as default  **Countries :**  **Fields:**  ApprovalType  Levels  Approvers |
|  | **Power user radio button Select and Save click** | Once user select Poweruser defined  Dropdown with 3 levels will be displayed  If User Select Level 1 then beneficiarys line manager will be approver and Updated it to the selected country  If user Selects Level2 then for 2nd approver people picker field will be displayed for user to select the approver and updated to the selected country with approvers  If user Selects Level3 then for 2nd approver and 3rd approver people picker fields will be displayed for user to select the approver and updated to the selected country with approvers  **Countries :**  **Fields:**  ApprovalType  Levels  Approvers |
|  | **Source from AD button Select and Save click** | Once user select Source from AD defined  Dropdown with 3 levels will be displayed  If User Select Level 1 then beneficiarys line manager will be approver and updated to the selected country  If user Selects Level2 then for 2nd approver dropdown with option to select Line Manager’s manager or VP as the approver and updated to the selected country with approvers  If user Selects Level3 then for dropdown with option to select Line Manager’s manager or VP as select the approver and updated to the selected country with approvers  **Countries :**  **Fields:**  ApprovalType  Levels  Approvers |

#### Export Users

Solution Name: ESRAExportGroupUsers

Webpart Name: ESRAExportGroupUsers

| **DS ID** | **Event** | **Description** |
| --- | --- | --- |
|  | **Source** | Stipend Request, SharePoint groups |
|  | **OnLoad** | Sys admin will be provided with drop down control to select a SharePoint group or stipend users |
|  | **On dropdown selection** | If User selects the SharePoint group  Fetch all users from the SharePoint group selected from the dropdown and display them in table  User can also export the users to excel  **Table Columns:**  GroupName  User Email  User Name |

|  |  |  |
| --- | --- | --- |
|  | **On dropdown selection** | If User selects the stipend users then Export Stipend Users button will be visible to export the users  **Excel Columns:**  Beneficiary Name  Beneficiary Email  Beneficiary Type  Beneficiary Job Grade  Beneficiary Department  Beneficiary Current Country  Stipend Category  Currency  Request Date  Request Type  Requestor  Status  Approval Reject Date  Manager Name  Reviewer  User Principal Name  Policy Name  Approval Email Sent |

#### Update Approver

Solution Name: ESRAApproverUpdate

Webpart Name: ESRAApproverUpdate

| **DS ID** | **Event** | **Description** |
| --- | --- | --- |
|  | **Source** | Stipend Request |
|  | **On Load** | Sys admin/Power user will be provided with People picker control to select an approver |
|  | **On Select** | System will check for the stipend request where NexReviewer is equal to selected approver and Status=’In-Progress’ and get all records and displays in the grid and New approver people picker control and Update button  **Column to be shown in Grid**: Beneficiary, Approver, Stipend Type, Date Requested, Department |
|  | **On Select** | If there no request for selected approver a No records message will be displayed |
|  | **Update click** | After clicking on update button all the In-Progress stipend request from old approver will be update to new approver  And notification email will be sent to the new approver and old approver |

#### To Be Cancelled

Solution Name: ESRAToBeCancelledRequests

Webpart Name: ESRAToBeCancelledRequests

| **DS ID** | **Event** | **Description** |
| --- | --- | --- |
|  | **Source** | Stipend Request |
|  | **On Load** | Sys admin will able to see all “To be Cancelled” request  **Column to be shown in Grid**: Beneficiary, Country Name, Stipend Type, Date Requested, Department |
|  | **Approve Cancellation** | Admin can select one item at a time or all items at a time to approve the cancellation of the request  Stipend Request status will be updated to Cancelled  And notification email will be sent to the beneficiary |
|  | **Revert Cancellation** | Admin can select one item at a time or all items at a time to Revert the cancellation of the request  Stipend Request status will be revert to last previous version |

#### Common Functions

Solution Name: ESRAServices

Library Name: ESRAServices

Library Path: This is imported as a module 'esra-services'

| **DS ID** | **Function** | **Description** |
| --- | --- | --- |
|  | **ESRAListOperations**  **GetAllData(listName)** | Returns collection of all items in the list provided in the function call |
|  | **GetItemByID(listname,ID)** | Returns a particular record from the list based on item ID provided in the function call |
|  | **GeItemByFliter(Listname,filtercondition)** | Returns collection of item/items from the list based on the filter condition provided in the function call |
|  | **GetItemVersion(Listname,ItemID)** | Returns version history of the record from the list based on the item ID provided in the function |
|  | **CreateItem(ListName,Data)** | Creates a new item in the list based on the data provided in the function call |
|  | **UpdateItemByID(Listname,ID,Data)** | Updates an item in the list based on the item ID and data provided in the function call |
|  | **UpdateBatchItems(Listname,data)** | Updates batch of items in the list based on the data provided in the function call |
|  | **getUserProperties(User)** | Returns all the current user properties from AD |
|  | **getAllDataForSelectedFields(ListID,Data)** | Returns all the data from the List ID for Selected fields |
|  | **getAllDataForSelectedFieldsByListTitle(ListTitle,Data)** | Returns all the data from the List Name for Selected fields |
|  | **ESRAUserInfo**  **isCurrentUserMemberOfGroup(Group)** | Checks if the User is member of group provided in the function call |
|  | **getUserInfo(user)** | Get all the user information of the User provided in the function call |
|  | **GetAPiData** | Get the worker based on the email id |
|  | **ESRARequestTypes** | All the Request types used in the application |
|  | **ESRABeneficiaryType** | All the beneficiary types in the application |
|  | **ESRAStatus** | All the status used in the application |
|  | **getSiteGroups** | Get all the SharePoint groups in the application |
|  | **getGroupsUsersByGroupName** | Get all the users based on the SharePoint group name provided |
|  | **ESRACommonOperations**  **ExportToExcel(Data)** | Export’s content provided in the function call to excel |
|  | **ESRALogger**  **ErrorLog(exception)** | Log the Exception |
|  | **ESRAEmailServices**  **Sendemail(To,CC,sub,body)** | Send notifications based on the information provided in the function call |
|  | **ESRAGroupOperations**  **AddUserToGroup(Groupname,user)** | Adding a user to SharePoint group provided in the function call |
|  | **RemoveUserfromGroup(Groupname,User)** | Remove a user from SharePoint group provided in the function call |

#### Common Control

Solution Name: ESRACommonControl

Library Name: ESRACommonControl

Library Path: This is imported as a module 'esra-common-controls'

| **DS ID** | **Function** | **Description** |
| --- | --- | --- |
|  | **DisplayTermsAndCondition(Data)** | To display the Terms & Condition pop up |
|  | **Excport to Excel** | To Export content into Excel file |
|  | **Version History** | To display the version history of the item |

#### Custom Pages

| **DS ID** | **Page Name** | **Description** |
| --- | --- | --- |
|  | **Enroll** | Following webparts are added.   |  | | --- | | ESRATopNavigation: Top Navigation | | ESRABenefeciaryWelcomeDetail: Welcome Message | | ESRABenefeciaryDetail:Stipend Information and Enrollment Request | |
|  | **Approve-Reject** | Following webparts are added.  ESRATopNavigation: Top Navigation  ESRAPendingRequests:Pending Request  ESRAPreApprovedRequests:Pre-Approved Request  ESRACompletedRequests:Completed Request |
|  | **Reports** | Following webparts are added.  ESRATopNavigation: Top Navigation  ESRAReportTabs:All Report tabs |
|  | **Enrollment Report** | Following webparts are added.  ESRATopNavigation: Top Navigation  ESRAEnrollmentReport Webpart |
|  | **Payroll Report** | Following webparts are added.  ESRATopNavigation: Top Navigation  ESRAPayrolReport:Payroll Webpart |
|  | **Summary Report** | Following webparts are added.  ESRATopNavigation: Top Navigation  ESRAStipendSummary webpart |
|  | **Settings** | Following webparts are added.  ESRATopNavigation: Top Navigation  ESRASettingsTab Webpart |
|  | **Request on behalf** | Following webparts are added.  ESRATopNavigation: Top Navigation  ESRARequestOnBehalf Webpart |
|  | **Bulk Upload** | Following webparts are added.  ESRATopNavigation: Top Navigation  ESRACreateBulkStipends Webpart |
|  | **Power user Pending Request** | ESRATopNavigation: Top Navigation  ESRAPowerUserPendingRequests:Pending Request  ESRAPowerUserCompletedRequests:Completed Request |
|  | **Export Users** | ESRATopNavigation: Top Navigation  ESRAExportGroupUsers: Export Users |

## Schedule Jobs

Following Jobs will be schedule for sending notifications and back-end work.

### **Adding/removing removes user from AD upon approval/opt-out**

| **DS ID** | **Event** | **Description** |
| --- | --- | --- |
|  | **Every 1 hr. starting form 12:00 AM** | Update the SharePoint group/AD based on action.  Select Items as per below conditions:  List Name: Stipend Request  Filter Condition: (Status = ‘Approved’ or Status = ‘Auto Approved’ and ApprovalEmailSent=”” ) |
|  | **On Enroll Approval** | If request status ‘Approved’ or Status = ‘Auto Approved’  Add User to Active Directory Group  Development - MobileIntune-DevUAT  Staging - MobileIntune-ProdUAT  ​Production MobileIntune-BYOD |
|  | **On Cancel Approval** | If request status ‘Cancelled ’ or Status = ‘Rejected  Remove User from Active Directory Group  Update inactive = True  Development - MobileIntune-DevUAT  Staging - MobileIntune-ProdUAT  ​Production MobileIntune-BYOD\_Retire  Send Notification to email to beneficiary after removing the user from the AD group |

### **Approval Email Sent Notifications**

| **DS ID** | **Event** | **Description** |
| --- | --- | --- |
|  | **Schedule Job run timing** | This Job will run after 1 hr from time Adding/removing user from AD schedule job |
|  | **Send Delayed Approval Email** | This Job will run after 1 hr from time Adding/removing user from AD schedule job  If request status is ‘Approved’ and Approval Email Sent is ‘No’  Then Send Approval Notification email to beneficiary and Set Approval Email Sent to ‘Yes’ for that request in stipend request list |

### **Payroll report - monthly**

| **DS ID** | **Event** | **Description** |
| --- | --- | --- |
|  | **Every month once Starting form last day of month** | Send a Report to Payroll list with attachment of details of approved Beneficiaries |
|  | **Every Occurrence** | Select email details from:List name: Email Templates Filter condition: Notification Type = **PayrollSuccessReport** |
|  | **Every Occurrence** | Generate an excel file for the Enrolled user.  To generate the excel file refer **DS 145-155** |
|  | **Every Occurrence** | Upload the generated file to following location.  Document Library: Payroll Reports  Filter Condition=Country  and update the file property as Year = current Year and Month = Current Month |
|  | **Every Occurrence** | Send Mail to Payroll distribution list with the generated excel file |

### **Reminder Email Notifications**

| **DS ID** | **Event** | **Description** |
| --- | --- | --- |
|  | **Schedule Job run timing** | This Job will run once every day |
|  | **Reminder First Email Notifications** | If request status is ‘Approved/Auto-Approved’ and Date reviewed is 22 months old from current date  Send First Reminder Notification to beneficiary to Re-Enroll the request |
|  | **Reminder Second Email Notifications** | If request status is ‘Approved/Auto-Approved’ and Date reviewed is 23 months old from current date  Send Second Reminder Notification to beneficiary to Re-Enroll the request |
|  | **Reminder final Email Notifications** | If request status is ‘Approved/Auto-Approved’ and Date reviewed is 7 days before 24th month old from current date  Send final Reminder Notification to beneficiary to Re-Enroll the request |
|  | **Send Weekly Notification** | Function executes only once in week based on the configure day in Application configuration |
|  | **Send Weekly Notification** | Send notifications to Manager if the request status is “In-progress” for more than 5 days |
|  | **Send Weekly Notification** | Send notifications to System administrator if the request status is “In-progress” for more than 20 days |
|  | **Line Manager Update** | Function executes only based on the configure days in Application configuration |
|  | **Line Manager Update** | If request status = ‘In-Progress “ or Status = ‘Rejected’ or status = ‘Approved ’ or Status = ‘Auto-Approved’ and check if Manager matches with the Supervisor from the worker data api call for that particular beneficiary |
|  | **Line Manager Update** | If it doesn’t match, then Update the Manager with the supervisor of worker data retrieved for that beneficiary for the stipend request  Send notification email to new line manager and beneficiary if the request status is In-Progress. |
|  | **On Expire Request** | Check if request status is ‘Approved/Auto-Approved’ and Date reviewed is 24 months old from current date then Change request status to ‘Cancelled ’ and remove the user from MobileIntune-BYOD group and add it  MobileIntune-BYOD\_Retire  Group and send notification to the user |
|  | **Disable User** | Function executes only based on the configure days in Application configuration |
|  | **Disable User** | Check in the worker data api call for that particular beneficiary  if the “empl\_status”is “I” i.e. In active as beneficiary is disable/left the organization then request status should be changed to ‘Left Gilead’ and  Remove User from Active Directory Group  ​MobileIntune-BYOD and add them to MobileIntune-BYOD\_Retire  group |
|  | **Update Terms and Condition** | Function executes only based on the configure days in Application configuration |
|  | **Update Terms and Condition** | If request status = ‘In-Progress “ or Status = ‘Rejected’ or status = ‘Approved ’ or Status = ‘Auto-Approved’ and |
|  | **Update Terms and Condition** | If request status = ‘In-Progress “ or Status = ‘Rejected’ or status = ‘Approved ’ or Status = ‘Auto-Approved’ and  if the Terms and condition url in the Policy configuration is different from the Policy Url in the Stipend Request list  then Notification email will be sent to beneficiary to update the new Terms and condition  Set NewTnCsNotfcatnSent = “Yes” and NewTnCsNotfcatnSentDate =Current date |
|  | **Update Terms and Condition** | If beneficiary does not update new terms and condition with in 14 days then on 15th day the status is set “Cancelled”  Notification email will be sent to beneficiary |
|  | **User Transition** | Function executes only based on the configure days in Application configuration |
|  | **User Transition** | If request status = ‘In-Progress “ or status = ‘Approved ’ or Status = ‘Auto-Approved’ and  if the “worker\_type” from worker data does not match with the Beneficiary type column in stipend list  Based on the configuration property value “MaxCancelledReuests”  If the number of requests are less than property value then  then the stipend request will be cancelled  If the number of requests are more than property value then  then the stipend request will be “to be cancelled”  and email notification is sent to Admin to approver/reject the request to cancel  i.e. Worker\_type is full time and beneficiary type is full time and vice versa |
|  | **User Transition** | If request status = ‘In-Progress “ or status = ‘Approved ’ or Status = ‘Auto-Approved’ and  if the “office\_type” from worker data does not match with the Beneficiary type column in stipend list  Based on the configuration property value “MaxCancelledReuests”  If the number of requests are less than property value then  then the stipend request will be cancelled  If the number of requests are more than property value then  then the stipend request will be “to be cancelled”  and email notification is sent to Admin to approver/reject the request to cancel  i.e. office\_type is full time and beneficiary type is remote full time and vice versa |

# References

| **Document ID** | **Document Title** |
| --- | --- |
| ITD-0289 | Lexicon of Computer Technology |

# Final Design Specification Approvals

| **Signature** | **Role** | **Date** |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

| REVISION HISTORY | | | | | |
| --- | --- | --- | --- | --- | --- |
| **Rev.** | | **Effective Date** | **Author** | **Description of Changes** | **Justification for Changes** |
| 0.1 | | 3/17/2021 | Akash Sabhahit | 1. New. | 1. New. |