AkkenCloud Import User Guide (v1.0.0.0)

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1.0 Introduction

AkkenCloud Import (ACI) is a windows compatible program that used to import data sets like employees, customers, assignments, time sheets and expenses from excel/csv files to AkkenCloud. These data sets are imported based on the mapping templates that are setup by the user within ACI. Templates are created with respect to the data set that needs to be imported. Below is the URL from which user can install AkkenCloud Import.

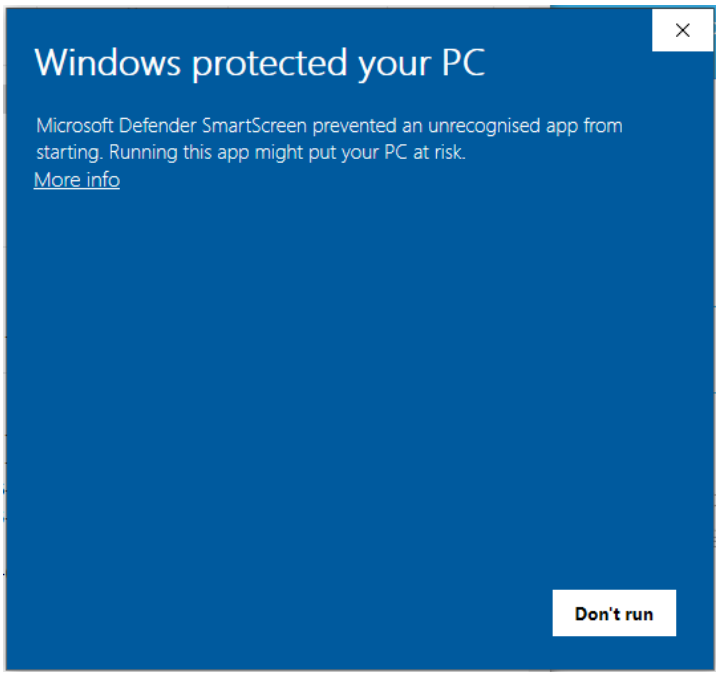
https://openapi.akken.com/AkkenCloudPlugins/ACI

Navigating to above URL opens the product page of AkkenCloud Import as shown in the below image.

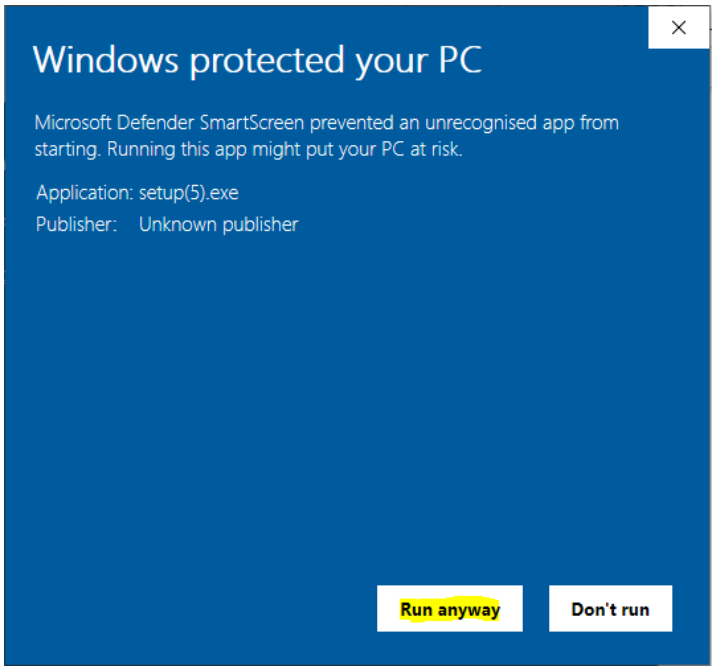
2.0 Installing ACI

Below are the steps to install AkkenCloud Import application.

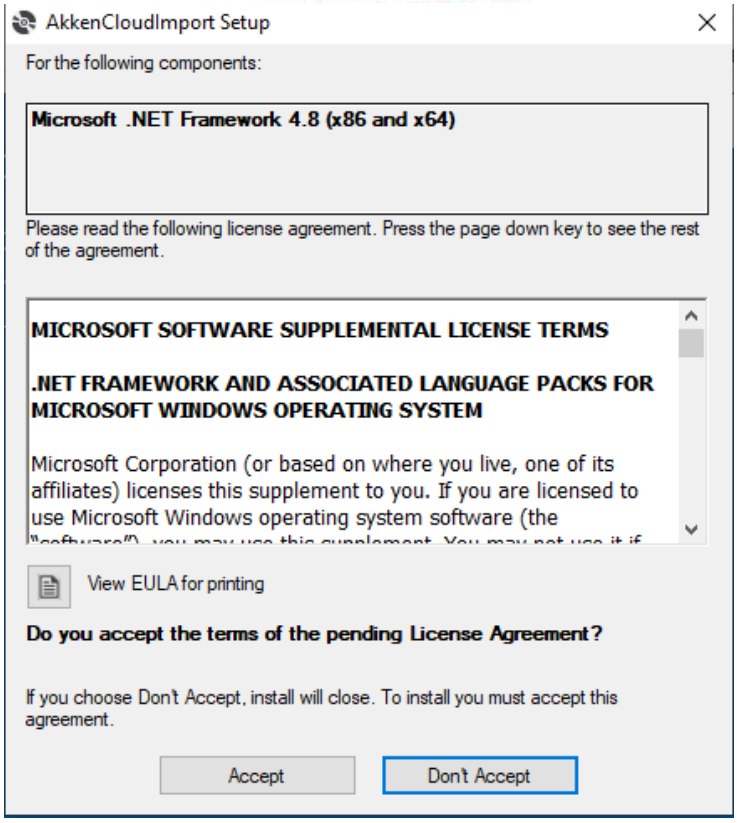
1. Click on the download icon under "**AkkenCloud Import Installer**" to download the setup file. Double click on the downloaded setup file to start the installation process. The below screen is displayed.



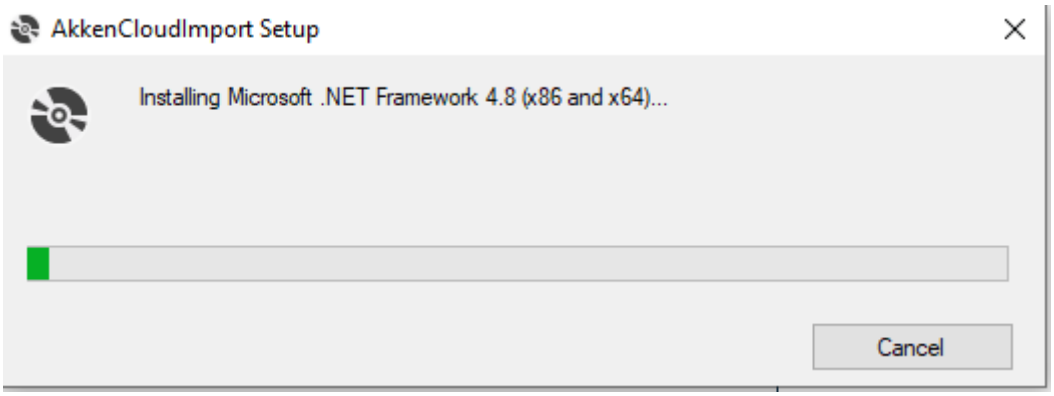
2. Click on "**More Info**".



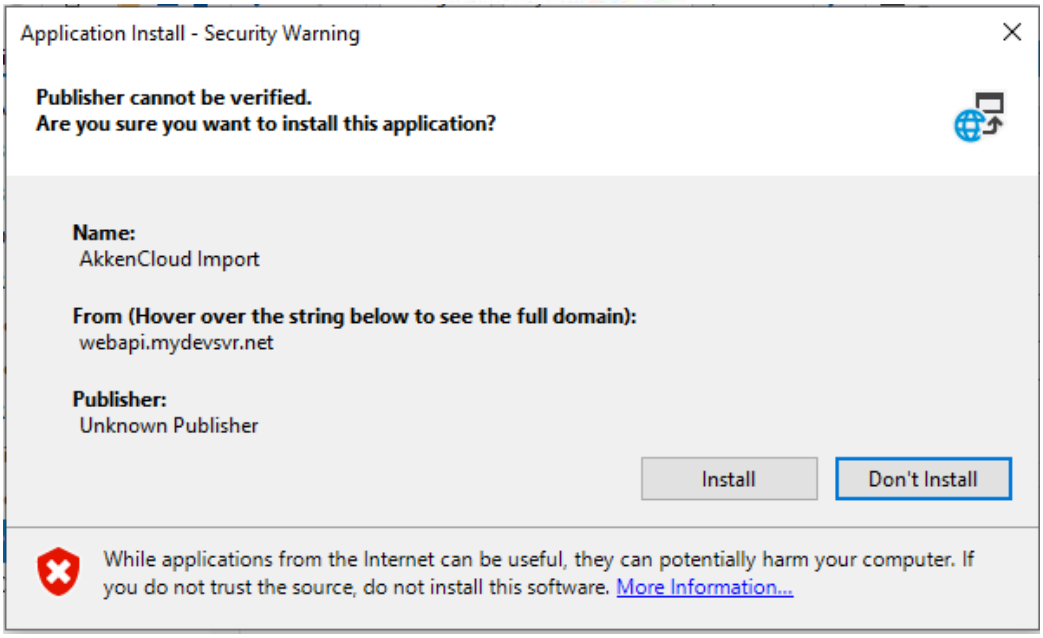
3. Click on "**Run anyway**".

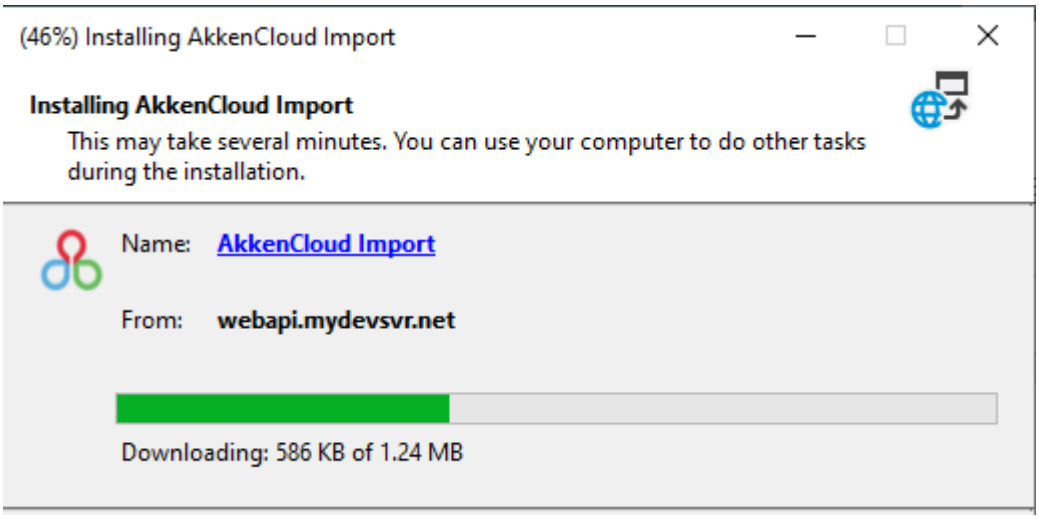


4. AkkenCloud Import requires "**.NET Framework 4.8**". If the user's PC does not have this pre-requisite installed, ACI installer identifies it and installs the required files as needed. If the framework is already installed, the installer skips this step. Click on Accept to continue. Below is the image that depicts framework is being installed.

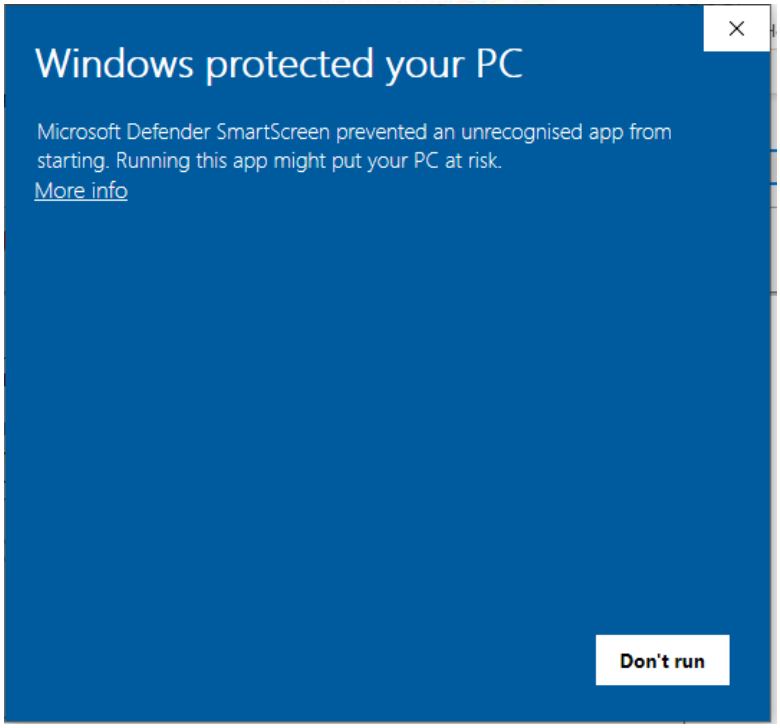


5. Once all the pre-requisites are installed, ACI setup downloads the required installation files and starts the installation of AkkenCloud Import. Below is the displayed screen. Click on "**Install**".

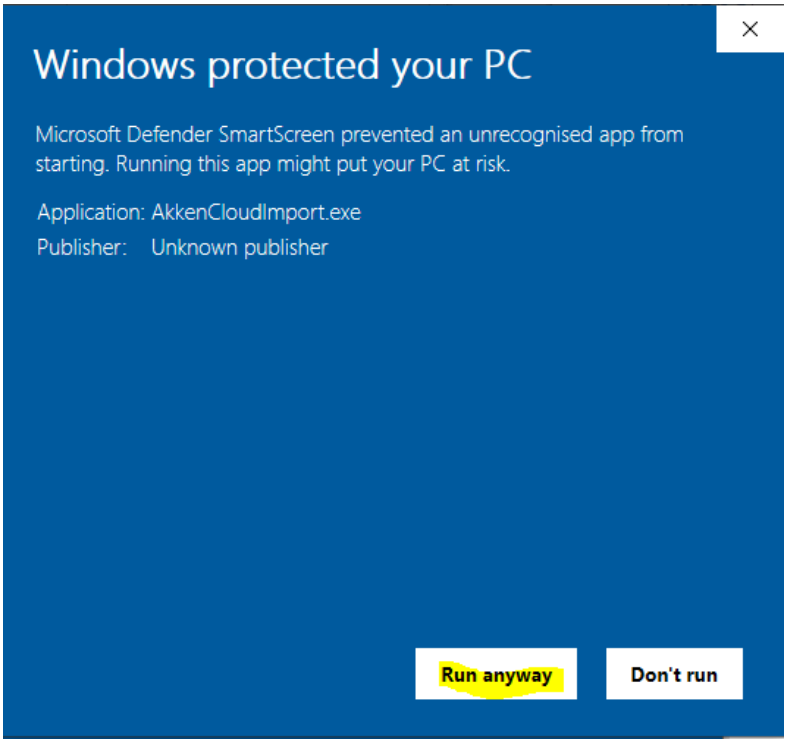




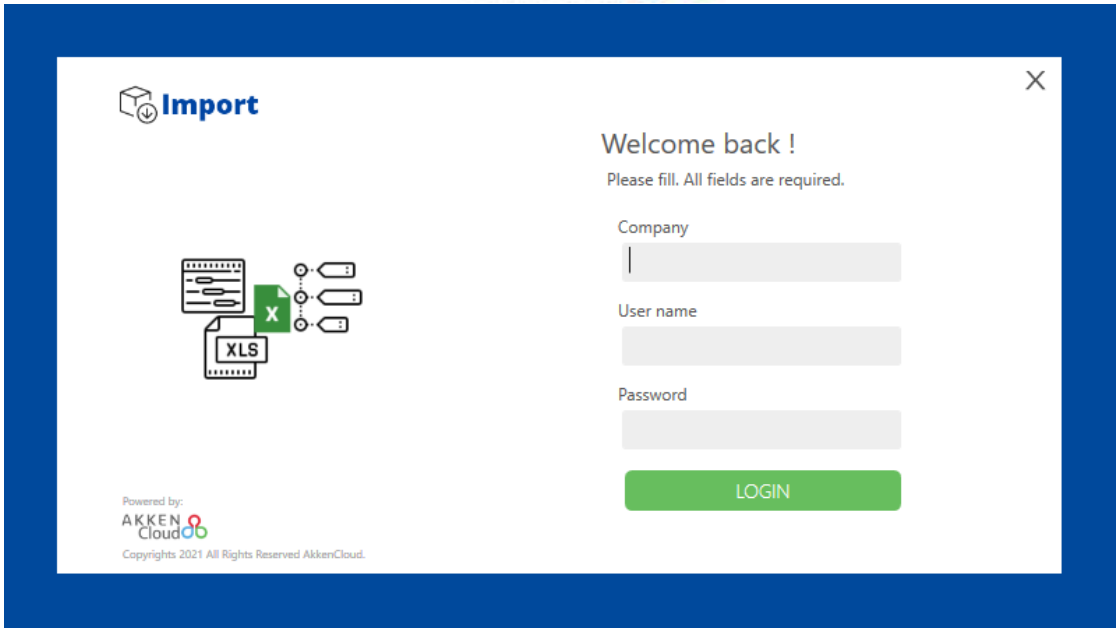
6. After the installation completes, the installer tries to start ACI for the first time. Since it is a first time start, windows defender prompts the user if the application can be opened or not, as shown below.



7. Click on "**More Info**".



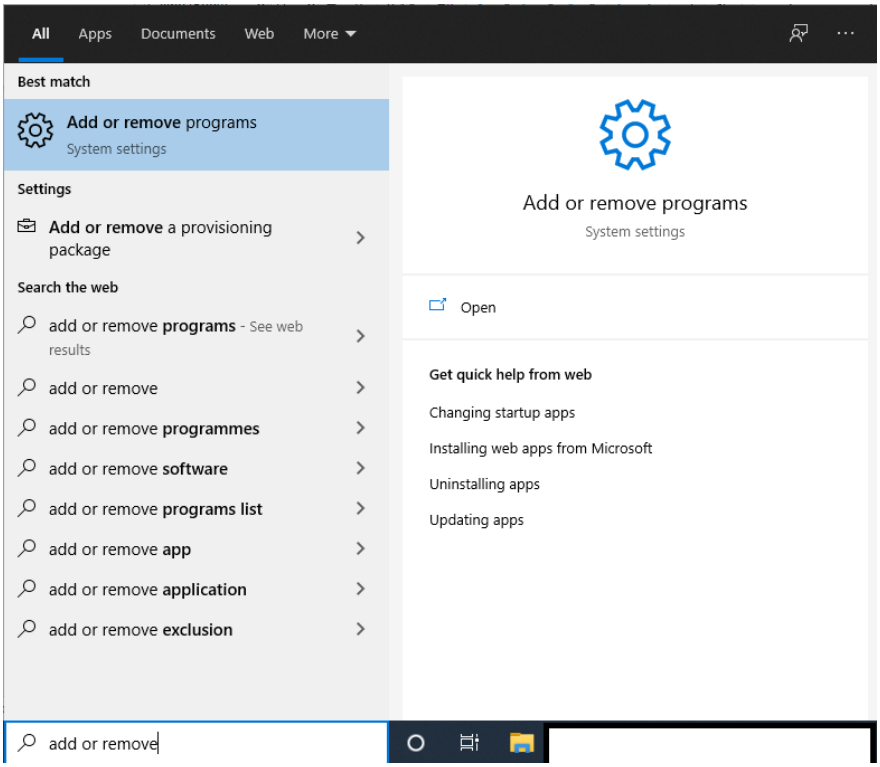
8. Click on "**Run anyway**".
9. This opens **AkkenCloud Import** login screen. Below is the sample image.



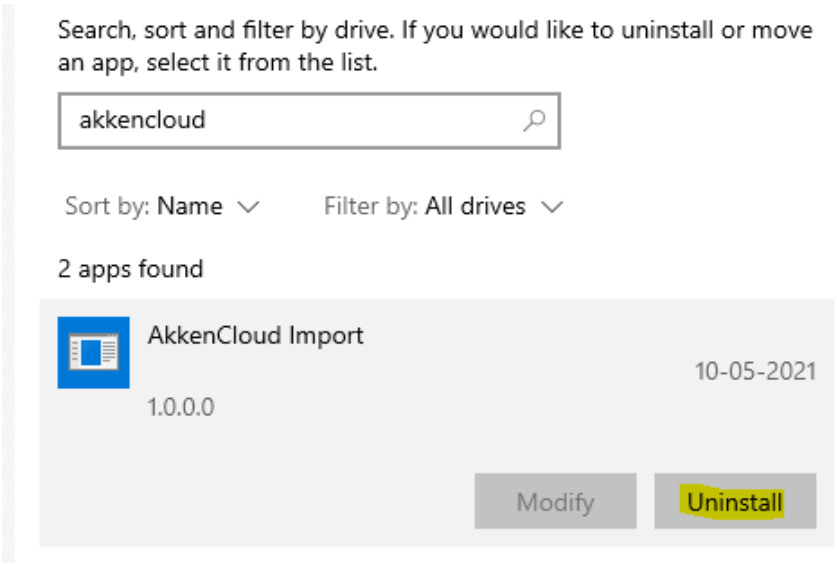
3.0 Un-Install/Remove ACI

To un-install existing ACI installation, follow below steps.

1. Search for "**Add or Remove**" programs in start search box as show in the below image.



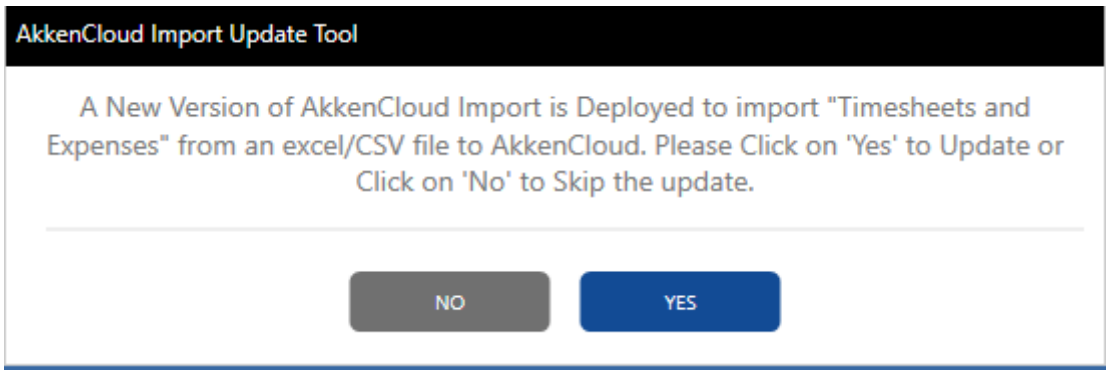
2. Open Add or Remove Programs and search for AkkenCloud Import. Below is the sample screen.



3. Click on "**Uninstall**" to continue.

4.0 Auto Updating ACI

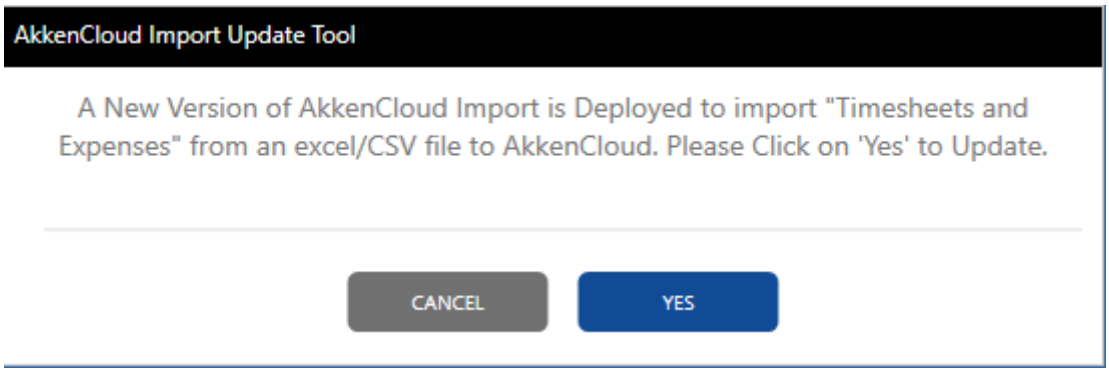
AkkenCloud Import will auto update whenever there is an updated version available. Every time ACI is successfully logged in, a check for new update availability is performed. ACI prompts the user during this check. Below is the sample screen for the same



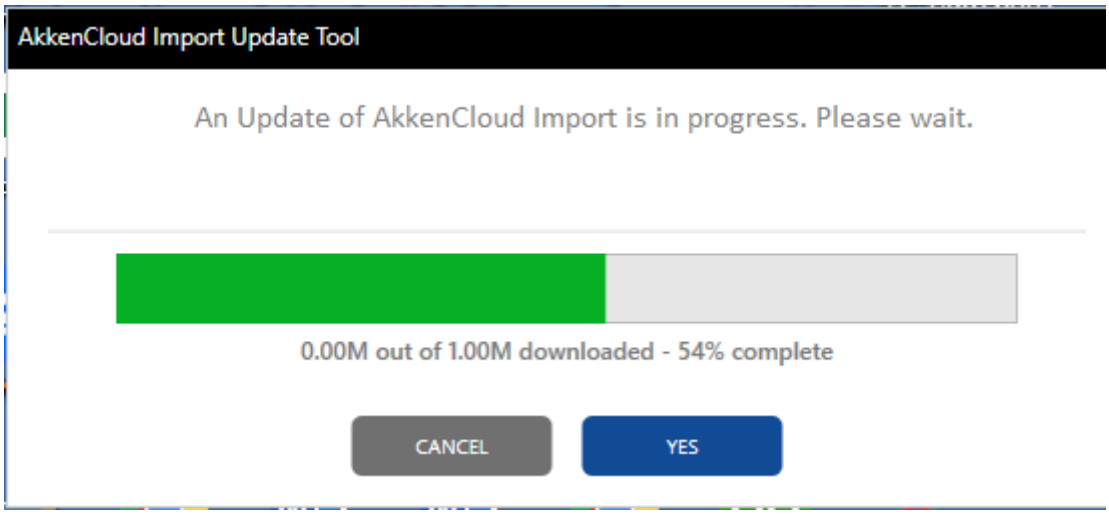
AkkenCloud Import has two types of updates, an optional update, and a mandatory update. If the update is optional, the user will be able to skip the update by clicking on "**No**" and continue working in ACI as shown in the above screen. If the user skips the update, the login screen opens.

ACI performs this check every time it is opened. It is highly recommended to update ACI whenever there is an update available to keep the application functionality up to date.

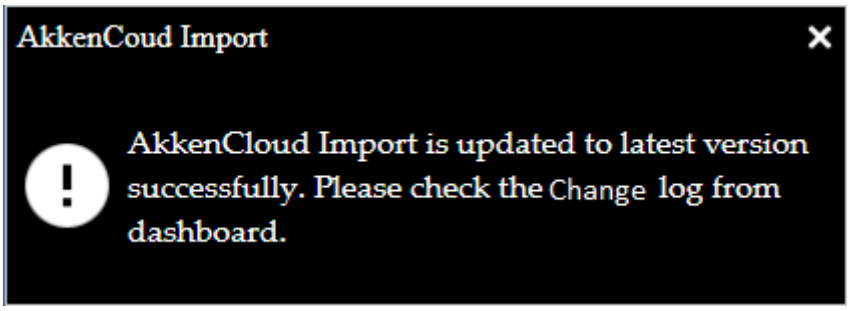
Below is the screen when ACI has a mandatory update. User will not be able to continue working with ACI until the application is updated. User can click on "**Cancel**" to close ACI.



When user clicks on "**Yes**", ACI updates automatically as shown below.



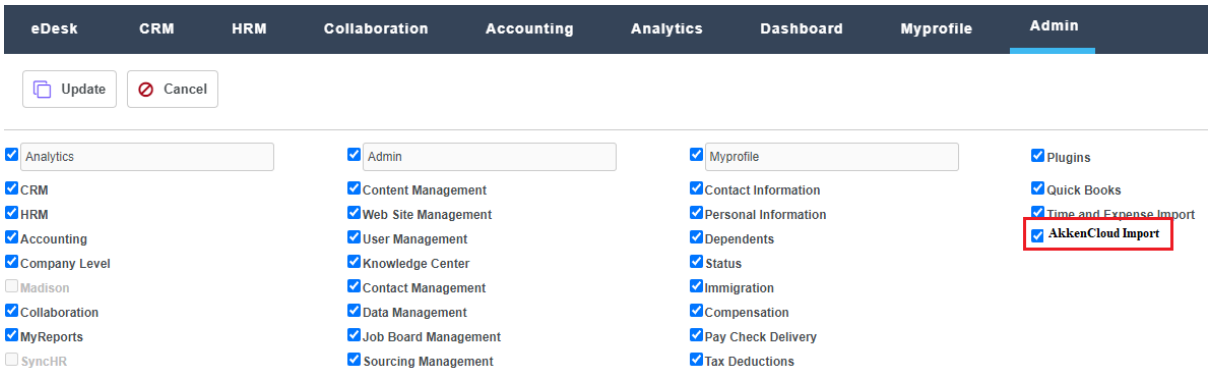
Once the update process is completed, a notification is shown as below.



5.0 ACI Access Barriers

Accessing AkkenCloud Import has three levels of access barriers. They are

1. AkkenCloud Import must be enabled to the company at company level access option providers. **This can only be done by AkkenCloud Team**.
2. ACI plugin option must be enabled to the user under plugins section of User Preferences. This can be done only by the Admin Users. Login into AkkenCloud as an admin user and Navigate to **Admin >> User Management >> User Preferences >> Plugins** and activate AkkenCloud Import check box. Below is the sample screen

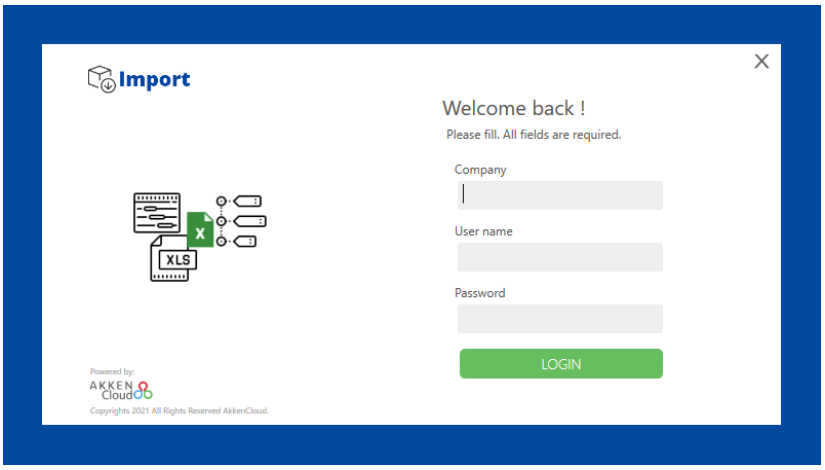


3. AkkenCloud Import only allows **The All In Users** and **Back Office Users** to access its functionalities. Any other user type will not be able to access ACI. This access layer is checked when a user logs in into ACI using their company/username/password credentials (details on login screen is explained in below sections).

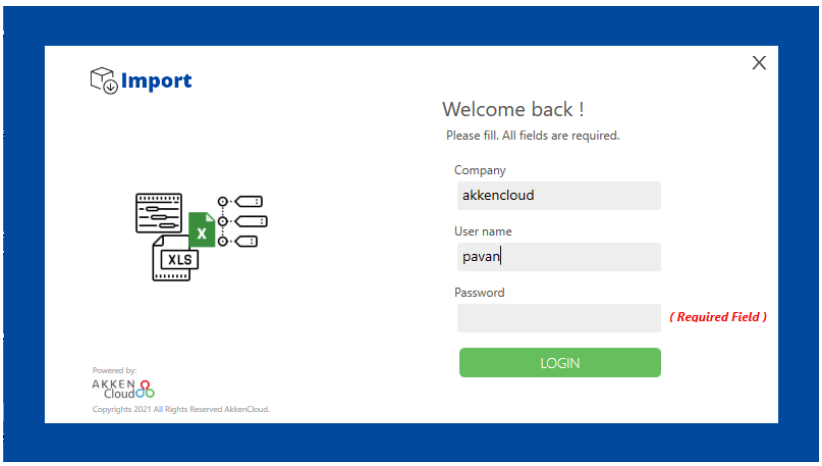
6.0 ACI UI Components

6.1 Login Screen

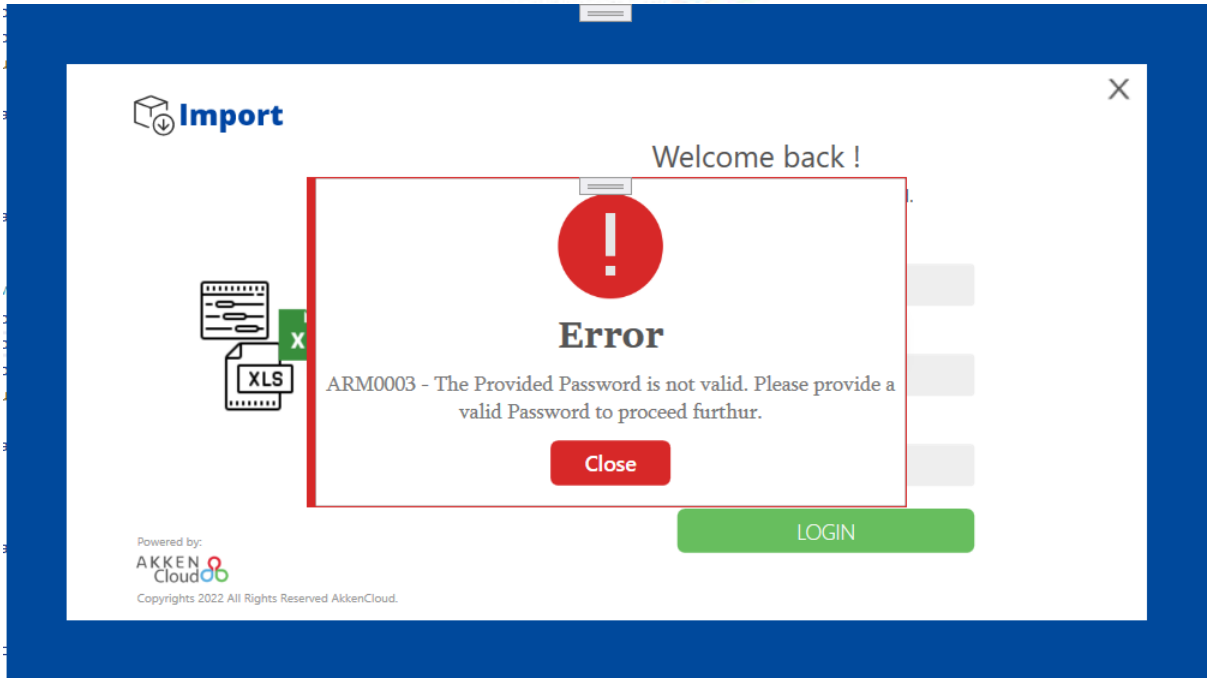
Import functionality can only be accessed by logging into the AkkenCloud Import tool. ACI logins are the same as AkkenCloud application logins. Only the **unlimited users and Back-office users** can access ACI. Every time a user opens ACI, the login screen appears as shown below. Only authenticated and authorized users will be shown the dashboard screen.



All the fields on the above screen are mandatory to provide before clicking on Login button. If any of the field is left blank, ACI prompts the user that the filed is required. As shown in below screen.

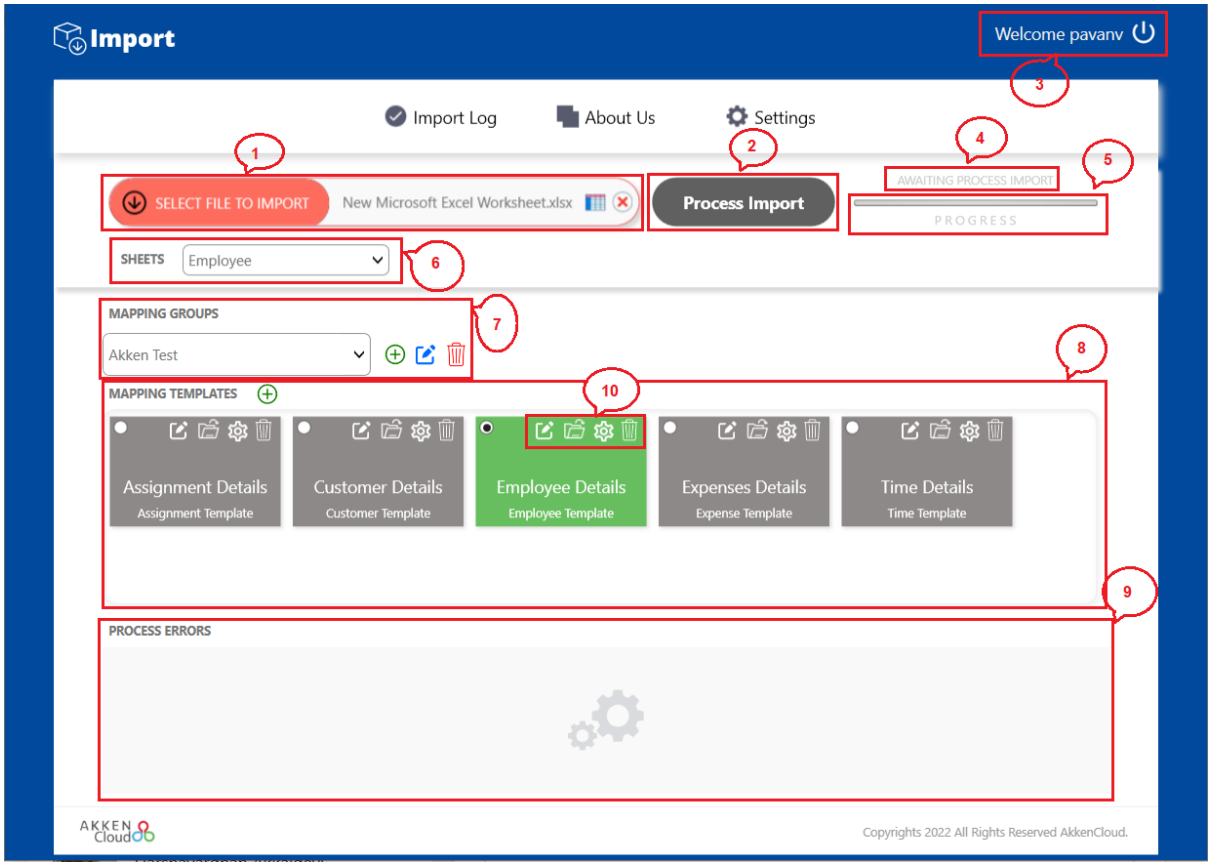


Once the credentials are provided and Login is clicked, ACI checks for the provided credentials and navigates to dashboard if the credentials are authenticated and authorized. If the credentials are not authenticated or authorized an error message is shown.


Import
Welcome back !
Error
ARM0003 - The Provided Password is not valid. Please provide a valid Password to proceed furthur.
Close
XLS
LOGIN
Powered by:
Copyrights 2022 All Rights Reserved AkkenCloud.

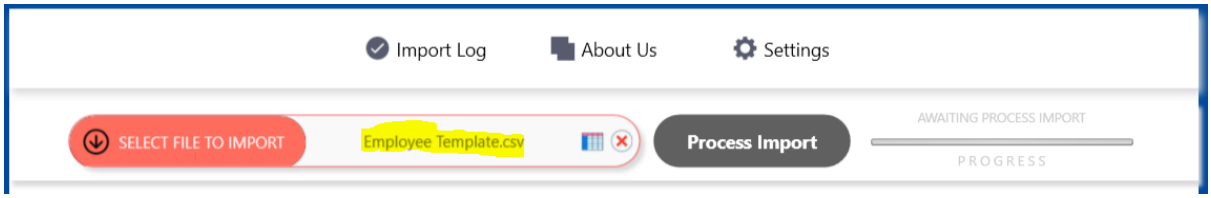
6.2 Dashboard Screen Regions

The dashboard is separated into numbered regions and are described below. marked is the home screen for ACI application. All ACI functions are initiated from the dashboard screen.

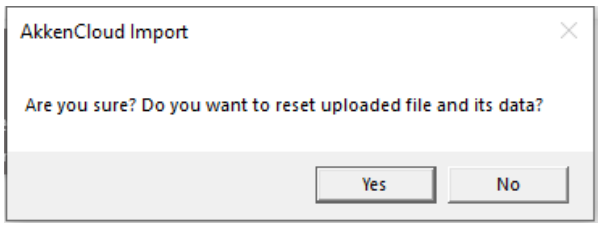


6.2.1 Region 1

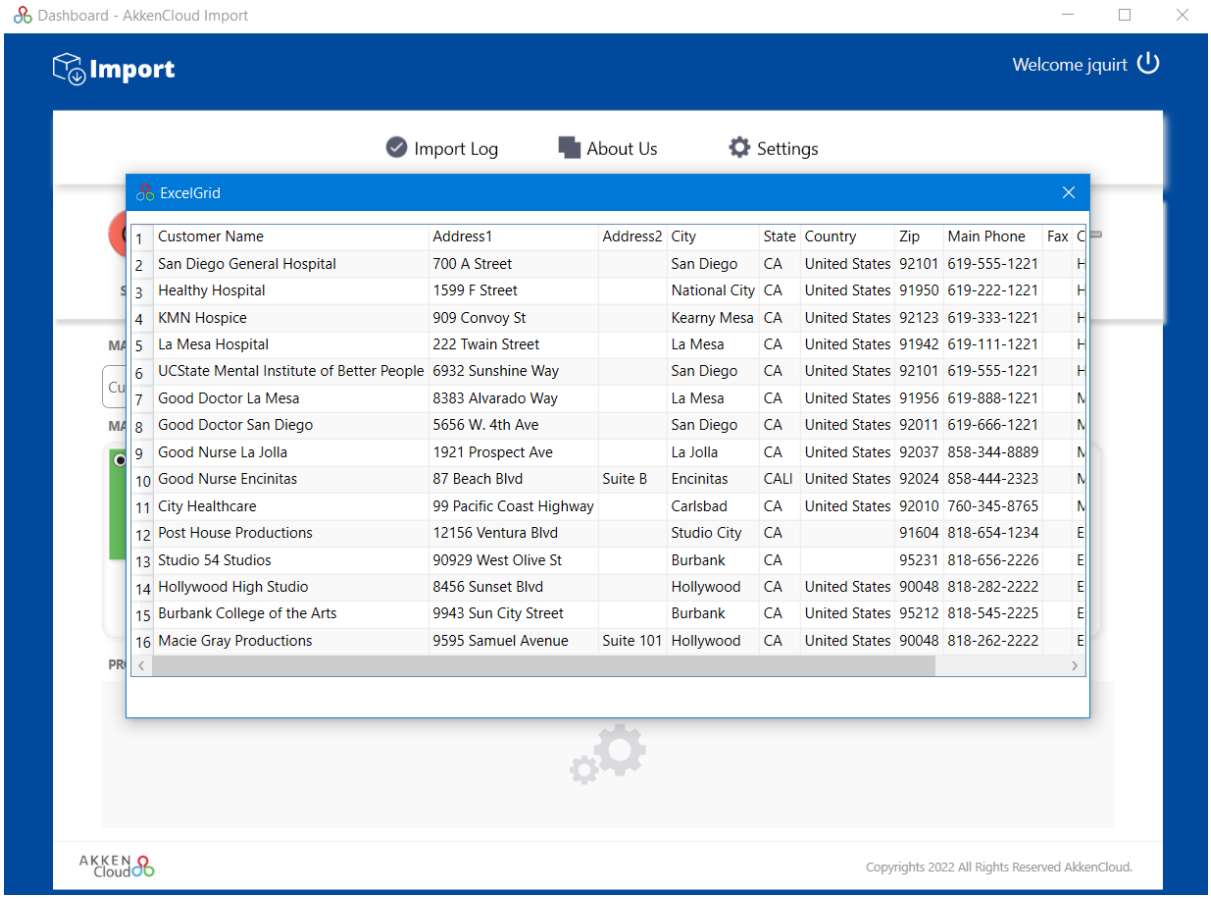
This region is used to select an MS Excel or .csv file to process the data in it. The red colour button labelled "**Select File To Import"** is used to upload the file from a location on the user computer to the ACI application. Once the file is uploaded the file name will be displayed in the file name area, next to the 'clear' button with the cross icon as shown in the below screen.



A user may clear the uploaded file and its data by clicking on the "clear" button. Once user clicked on the clear button, a confirmation prompt appears as shown below. Only if a user clicks on yes, the uploaded file and its data is cleared.



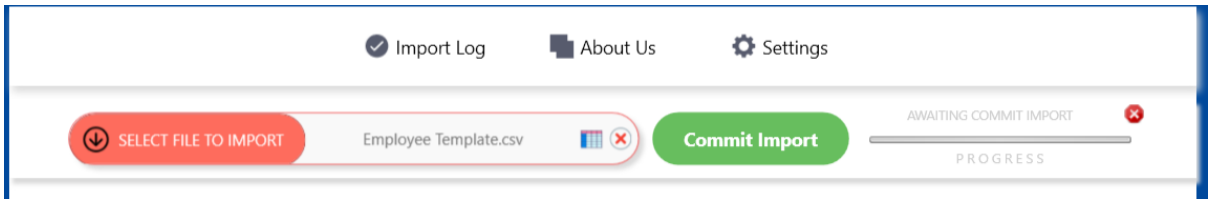
A user may also check the file data by clicking on the grid icon to the left of the clear icon. This displays a grid view of the data in the file. If the file has multiple sheets, the active selected sheet data will be displayed as shown below.



	Customer Name	Address1	Address2	City	State	Country	Zip	Main Phone	Fax
2	San Diego General Hospital	700 A Street		San Diego	CA	United States	92101	619-555-1221	
3	Healthy Hospital	1599 F Street		National City	CA	United States	91950	619-222-1221	
4	KMN Hospice	909 Convoy St		Kearny Mesa	CA	United States	92123	619-333-1221	
5	La Mesa Hospital	222 Twain Street		La Mesa	CA	United States	91942	619-111-1221	
6	UCState Mental Institute of Better People	6932 Sunshine Way		San Diego	CA	United States	92101	619-555-1221	
7	Good Doctor La Mesa	8383 Alvarado Way		La Mesa	CA	United States	91956	619-888-1221	
8	Good Doctor San Diego	5656 W. 4th Ave		San Diego	CA	United States	92011	619-666-1221	
9	Good Nurse La Jolla	1921 Prospect Ave		La Jolla	CA	United States	92037	858-344-8889	
10	Good Nurse Encinitas	87 Beach Blvd	Suite B	Encinitas	CALI	United States	92024	858-444-2323	
11	City Healthcare	99 Pacific Coast Highway		Carlsbad	CA	United States	92010	760-345-8765	
12	Post House Productions	12156 Ventura Blvd		Studio City	CA		91604	818-654-1234	
13	Studio 54 Studios	90929 West Olive St		Burbank	CA		95231	818-656-2226	
14	Hollywood High Studio	8456 Sunset Blvd		Hollywood	CA	United States	90048	818-282-2222	
15	Burbank College of the Arts	9943 Sun City Street		Burbank	CA	United States	95212	818-545-2225	
16	Macie Gray Productions	9595 Samuel Avenue	Suite 101	Hollywood	CA	United States	90048	818-262-2222	

6.2.2 Region 2

This button is called the **Import Action Button.** The name on the button changes based on the stage the import process is in. A deeper explanation about ACI functional stages is explained on **6.2.4.** When the user logged in, this button shows "**Process Import**". Once the uploaded file is processed it changes to "**Commit Import**" as shown in below image.

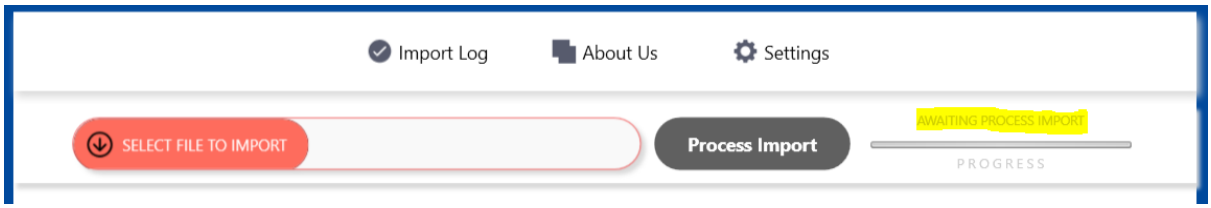


6.2.3 Region 3

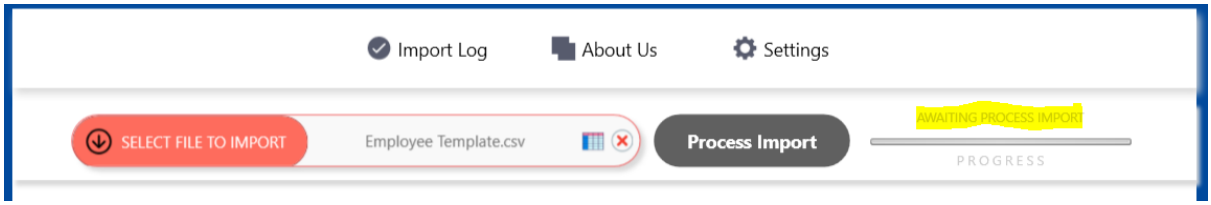
This region has detail about the active user. It also has the log out button where a user may log out of ACI. When a user clicks on log out, a confirmation prompt appears as shown in the below image. Clicking on "Yes" will log the user out of ACI.

6.2.4 Region 4

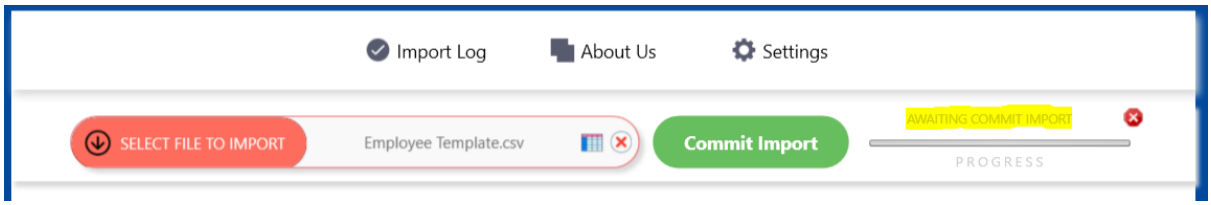
This region displays the three major functional stages of ACI – “awaiting file upload,” “awaiting process import” and “awaiting commit import.” Selecting a file that needs to be processed is the first step - this stage is called “awaiting file upload.”



Once the file is uploaded, processing the file must be done to make sure the data provided in the file is accurate and matches the mapping criteria. This can be done by clicking on the “**process import**” button as mentioned in **6.2.2**. This stage is named “**Awaiting Process Import**”



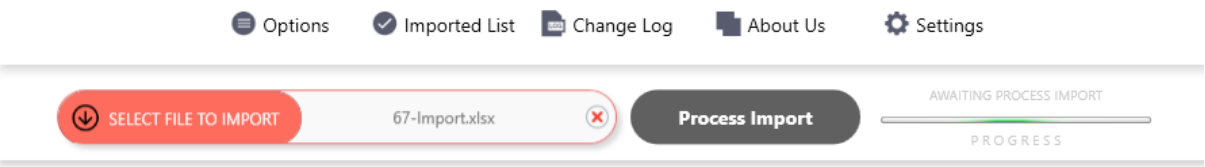
Once the processing is completed, ACI is ready to import the validated data to AkkenCloud. The process import is now changed to commit import. Clicking on this button will import all the processed data of the file to AkkenCloud. This stage is named as “**Awaiting Commit Import**”. Once these three stages are completed, ACI reverts to its first stage.



The stop button in the Awaiting Commit Import button area is provided to revert to process import stage manually. When a user clicked on this button, already processed data will be cleared and ACI will be reverted to its previous stage so that user can modify the data in the excel file and re-process the data.

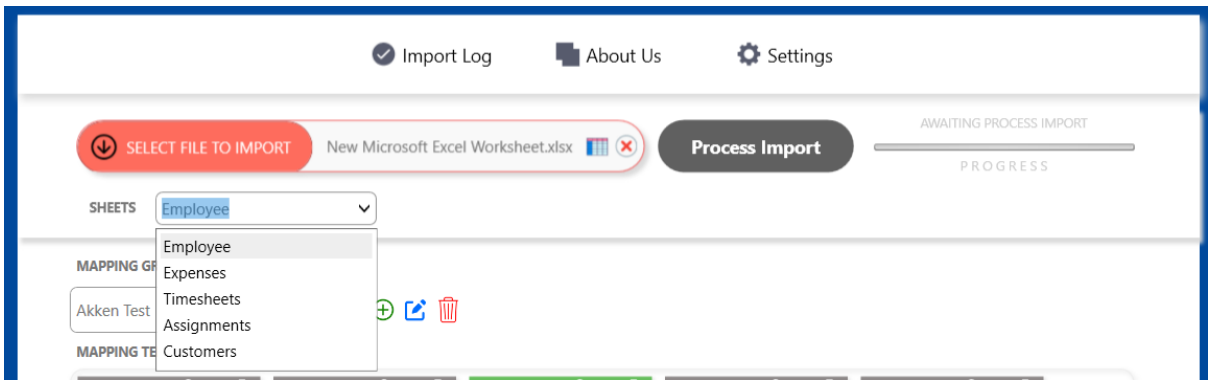
6.2.5 Region 5

This region displays a progress bar and the progress status text. When the data is being processed, the progress is shown in this region.



6.2.6 Region 6

This region has a drop down that depicts the workbook sheets of an Excel/CSV file which is populated when an excel file is uploaded to ACI. Since CSV files do not have multiple sheets, this drop down gets activated only when an Excel file is uploaded. When there are multiple sheets in the uploaded file, ACI provides a feasibility to select any of the sheet to process the data. The data of the selected sheet is processed. **ACI cannot process multiple sheets at a time**. Below is the sample screen when the uploaded file has more than one sheet.



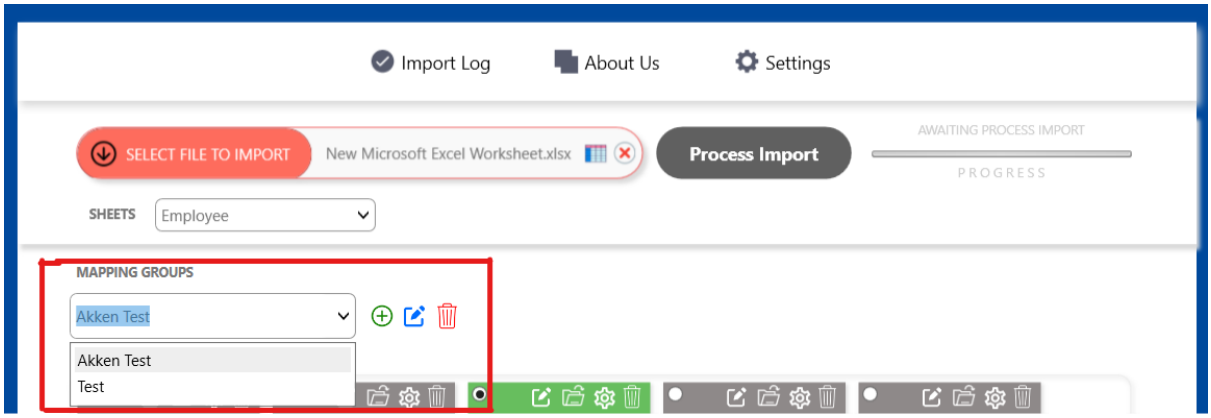
6.2.7 Region 7

This region shows the mapping groups and provides functional actions such as selection, adding, modifying and deleting of mapping groups. When the user adds a mapping group, the added group will be populated in this mapping groups drop down.

Mapping groups are used to segregate the mapping templates in a single area or region. User can have any number of mapping groups. All the associated templates of a particular mapping group are grouped to be displayed in region 8.

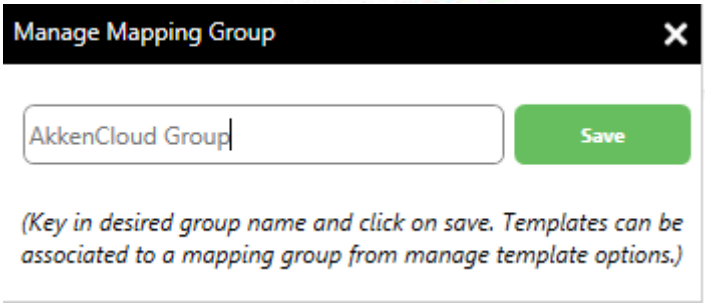
Mapping groups are used when there are various data sources (usually payroll providers) and each data source has various templates like time template, expense template, employee template etc. Each data source has its own structured format of data. To overcome this confusion of the mapping templates, groups are introduced in ACI. Below is the sample image that shows groups in ACI.

Mapping Group is the primary object that needs to be created before a template is created. It is a parent for a child template. Without groups, templates cannot be created.



Adding a mapping group:

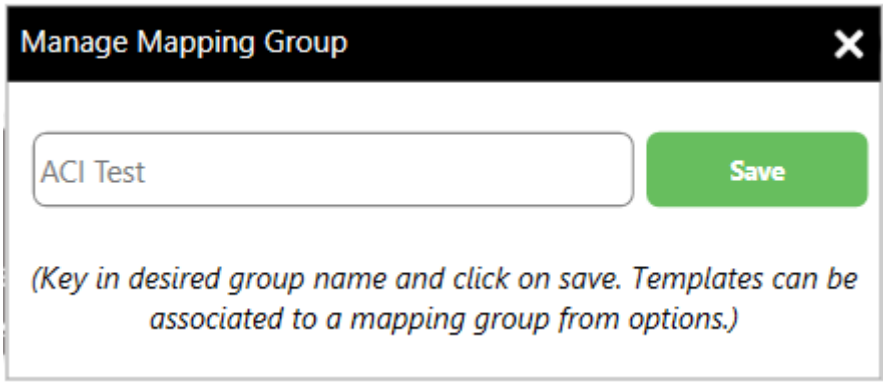
User may add a new mapping group by clicking on the ⊕ icon from the above image. Creating mapping group requires user to provide a valid group name. Duplicate group names will not be accepted by ACI. Template Group Names are unique for a user. Clicking on the add icon opens a manage mapping group screen as shown in below image.



After providing a valid name click on "**Save**". This will create a new group and can be viewed in the mapping groups dropdown.

Modifying Mapping Group:

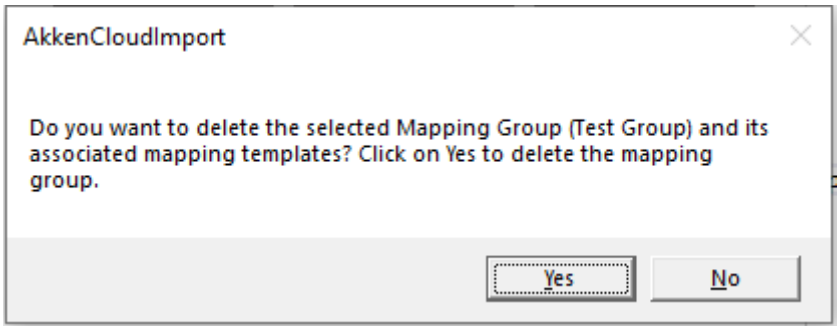
Clicking on icon will allow user to modify the selected template group as shown below.



Once the modification is done, click on "**Save**".

Removing Mapping Group:

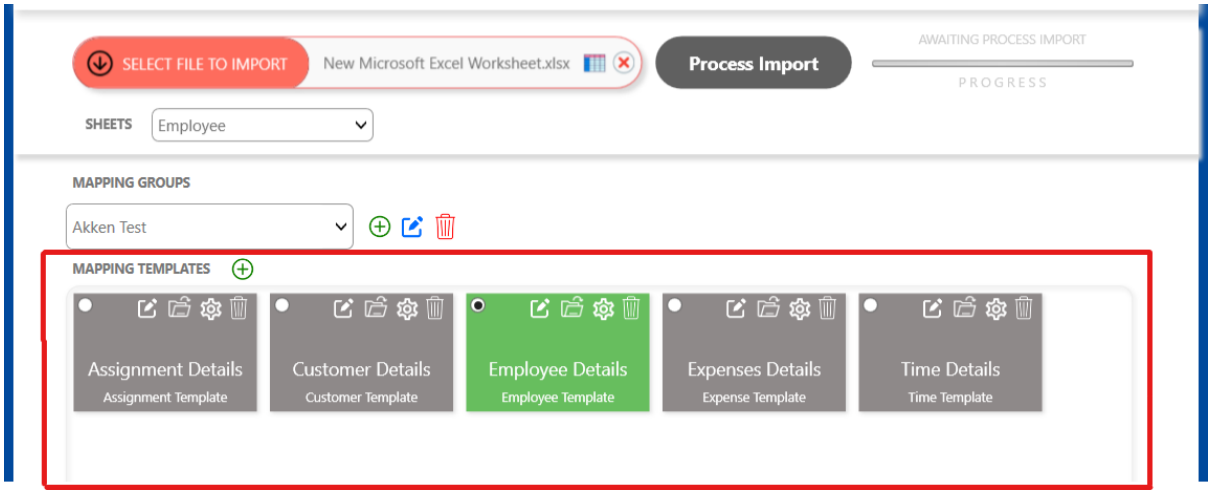
Clicking on icon will allow user to delete the selected template group and its associated templates. A confirmation prompt is provided for the user to reconfirm deletion. Once deleted, template group, its associated templates and their mappings cannot be recovered. Below is the sample prompt.



6.2.8 Region 8

This region has mapping templates of ACI. These templates are used to process the data of the uploaded file.

Mapping template is used to determine the format of the data. For every template there are two types of mappings, Excel Settings and Template Mapping. Excel settings can be opened by clicking on the settings icon of a template. Similarly, to open template mapping click on the folder icon on a template. Below is the sample screen.

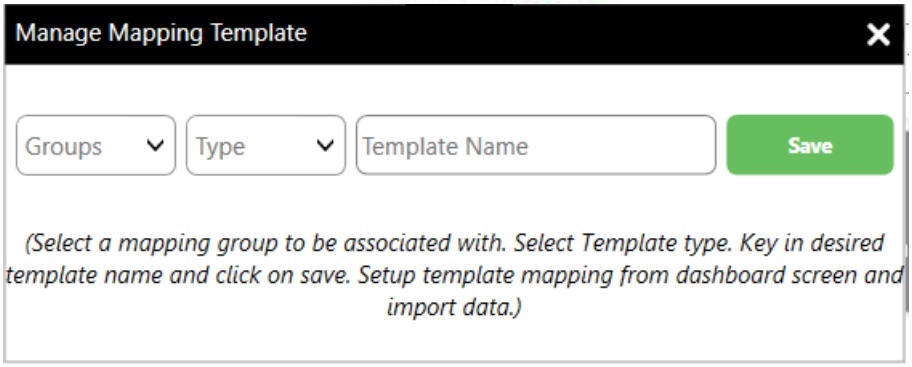


User will be able to access the settings and mapping of a template only after uploading a file to ACI.

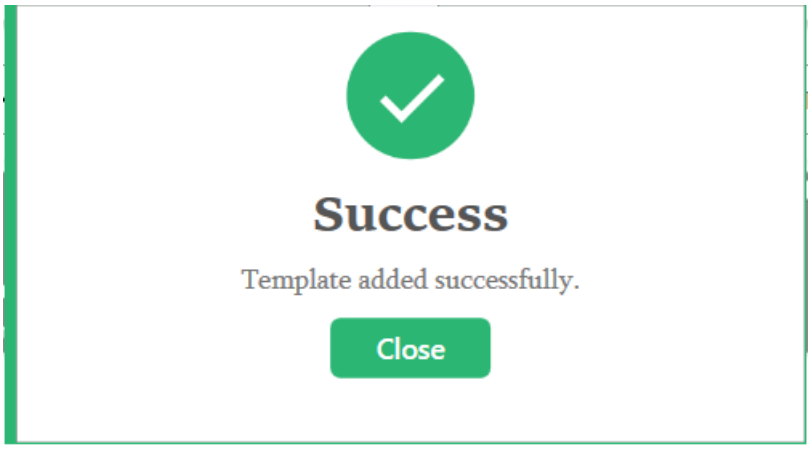
For every import session only one template can be selected/active. So, selection of multiple templates cannot be done. Selected template (active) is shown in green colour and all remaining inactive/unselected templates are shown in grey colour. User can switch between templates by clicking on the name of the template or the radio button on the respective template. User will be able to open settings and mapping of a selected/active template only.

Based on the mappings and excel settings, the data of the file is processed. A proper mapping of the data is necessary for a proper processing of data in the file.

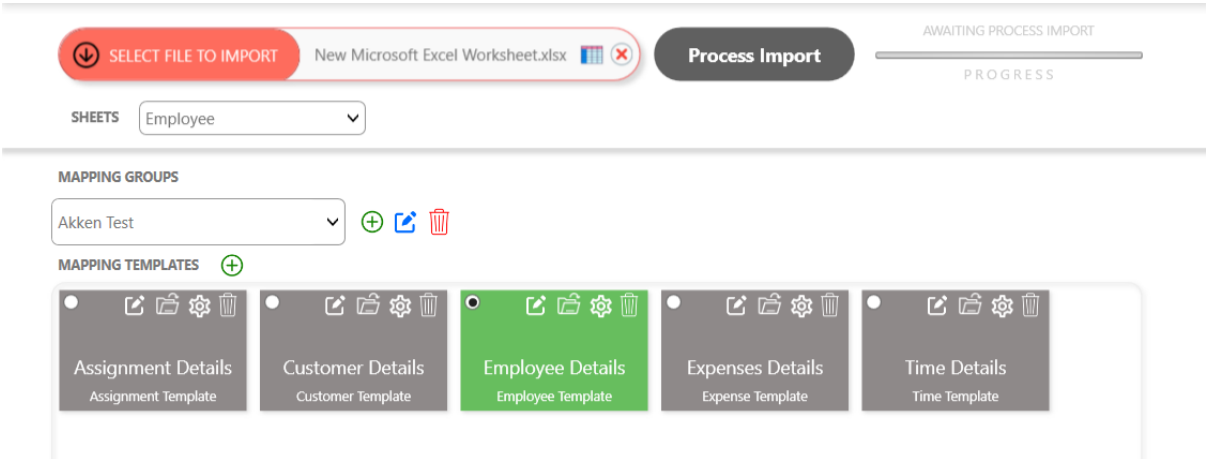
Clicking on ⊕ icon in the above screen initiates adding a new mapping template. Below is a sample screen for the same. Associating a mapping group to a mapping template is mandatory. So, at least one mapping group must be available to add a mapping template.



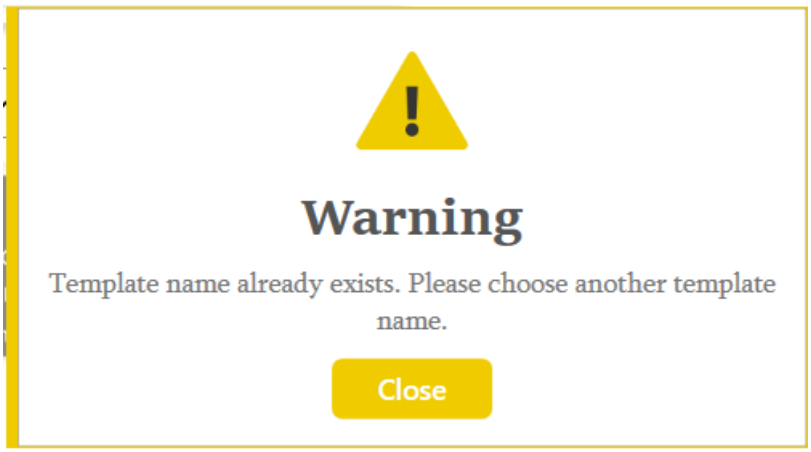
User will have to select an associating mapping group and template type to add a new mapping template with a name. All the fields are mandatory in the above screen. All the available mapping groups are populated in Groups Dropdown. Type dropdown has values of various data sets that can be imported using ACI i.e., Employee Template, Customer Template, Assignment Template, Time Template and Expense Template. This field is used to determine the type of a template. After providing the template name click on save to add a new template to selected group. Below are the sample screens.



Added Template can be viewed on the dashboard.

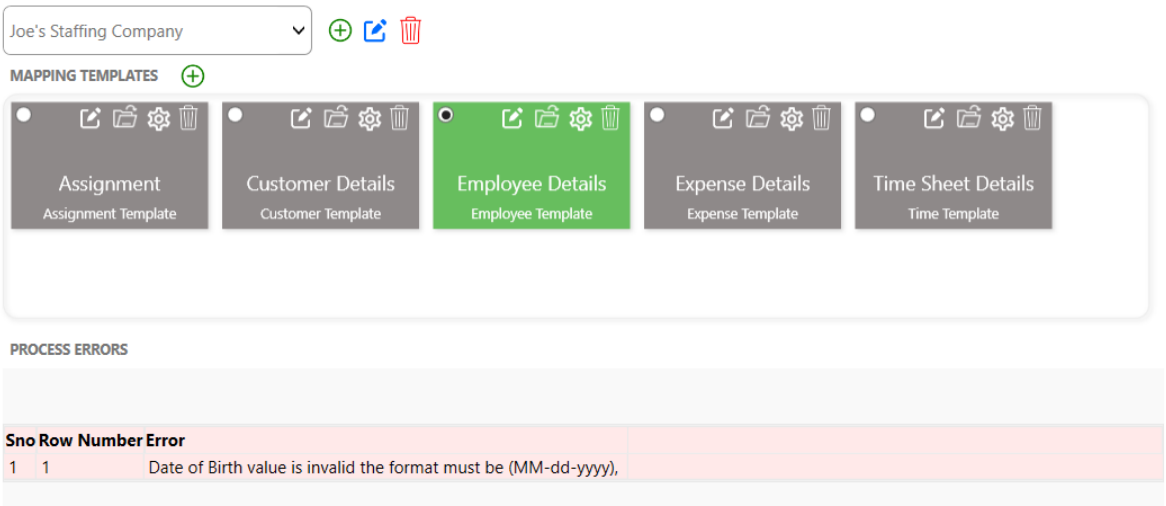


ACI does not allow user to create multiple templates with same name. If a same template name is given, ACI prompts the user with below message.



6.2.9 Region 9

This region gets populated with error rows and the error details. These are the errors occurred while processing/validating the file data. If the file has 100 rows, only 90 rows validated successfully. Then the other 10 rows are populated along with the error message in this region. Below is the sample Image.



6.2.10 Mapping Template

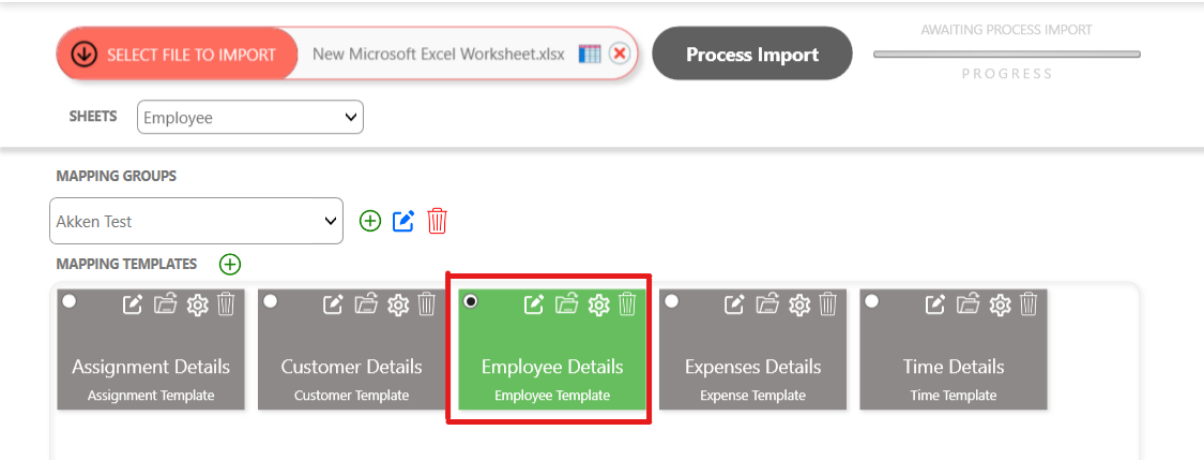
Each card in the mapping templates region is an individual mapping template. Each mapping template carries template mapping data with in it. User can select one template at a time to process the data in the uploaded file. Selected template is in green colour and other unselected templates are displayed in grey colour.

There are certain actions that can be performed on a mapping template. They are,

1. Select/Activate
2. Modify Template
3. Modify Mapping
4. Delete Template
5. Modify Excel Settings

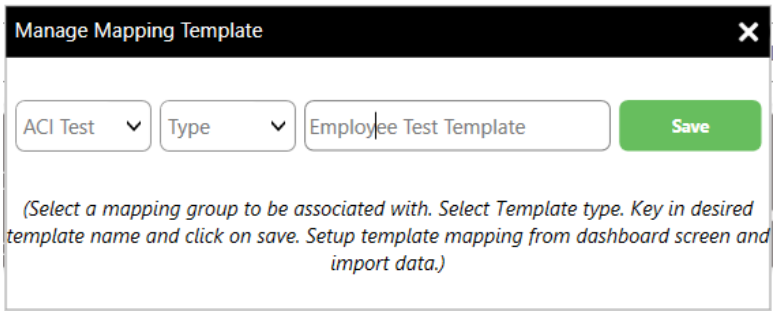
Activating a Mapping Template:

As mentioned above, user needs to have at least one active template to process the data in the uploaded file. To activate a template, you can click on the name of the template or on the radio button available in every template as shown in the below image.



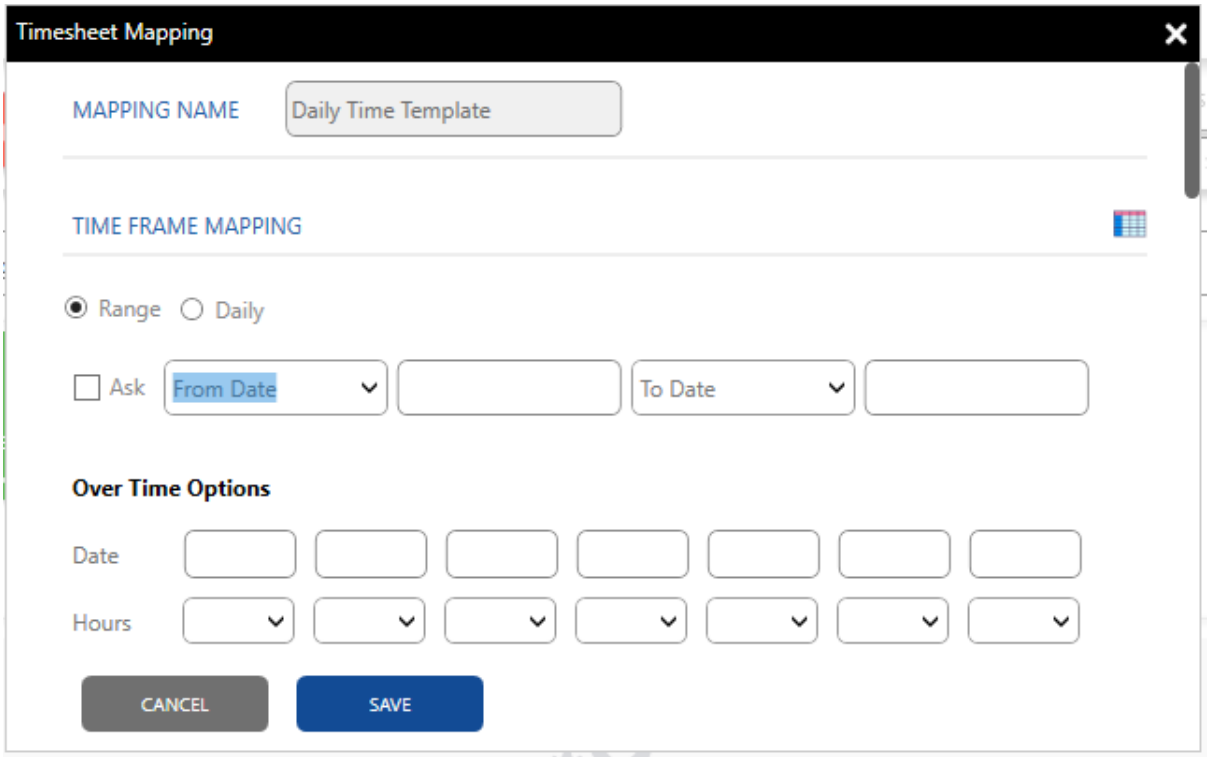
Modifying a Template:

Clicking on icon will allow user to modify the selected template in the current group. Below is the screen for the same. Once the modification is done, click on "**Save**".



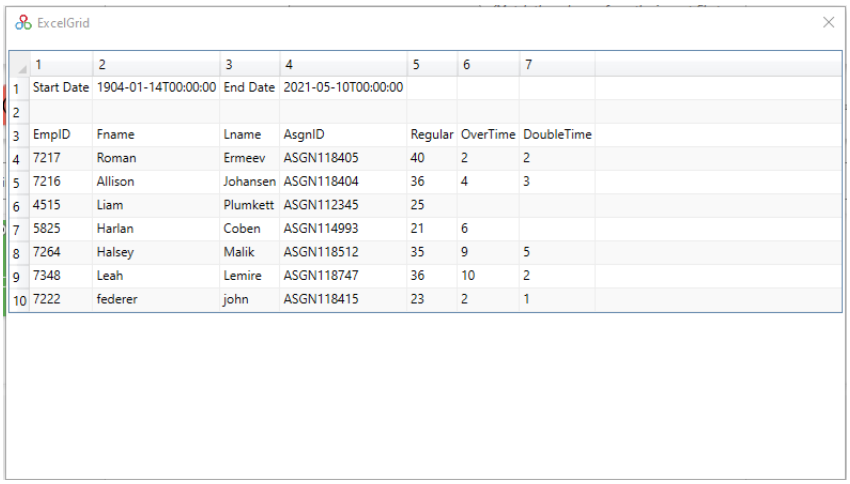
Modify Mapping of a Template:

Clicking on icon will allow user to modify the mapping of the selected template. Each mapping template has its own mapping and is based on the *type* of selected template. Time sheet and expense type templates are different.



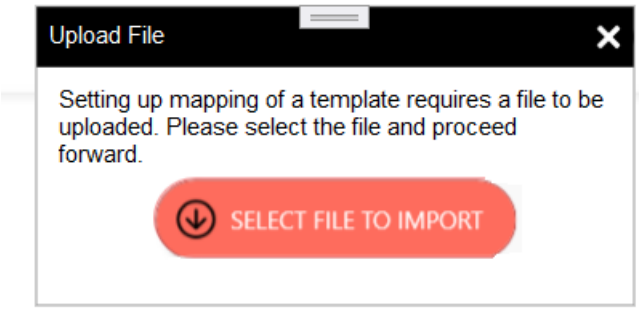
Mapping is to be setup based on the structured data in the excel/CSV file that is uploaded. It is recommended that Excel is setup to mapping so that the column names and data would be aligned as needed.

To make it easy and more efficient for the user to select mappings, clicking on the grid icon on the right of the screen in the above image opens the uploaded file data in a grid. Below is the sample screen.



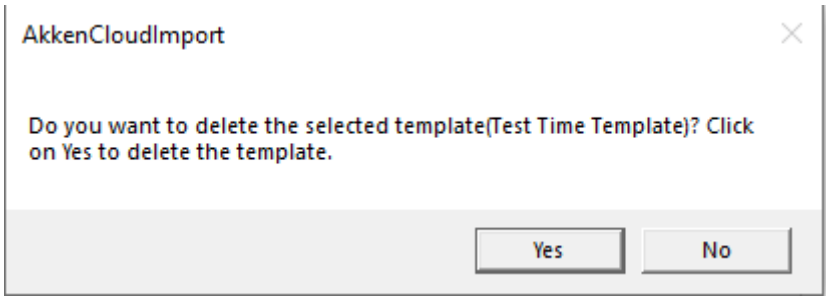
	1	2	3	4	5	6	7
1	Start Date	1904-01-14T00:00:00	End Date	2021-05-10T00:00:00			
2							
3	EmpID	Fname	Lname	AsgnID	Regular	OverTime	DoubleTime
4	7217	Roman	Ermeev	ASGN118405	40	2	2
5	7216	Allison	Johansen	ASGN118404	36	4	3
6	4515	Liam	Plumkett	ASGN112345	25		
7	5825	Harlan	Coben	ASGN114993	21	6	
8	7264	Halsey	Malik	ASGN118512	35	9	5
9	7348	Leah	Lemire	ASGN118747	36	10	2
10	7222	federer	john	ASGN118415	23	2	1

Mapping can be accessed only after a file is uploaded to ACI. Based on the uploaded file, mappings will be arranged by ACI. If a user tries to open the mapping of a template or excel settings without uploading a file, then ACI prompts the user to upload a file. Below is the sample screen. Once the file is uploaded the mapping screens opens automatically.



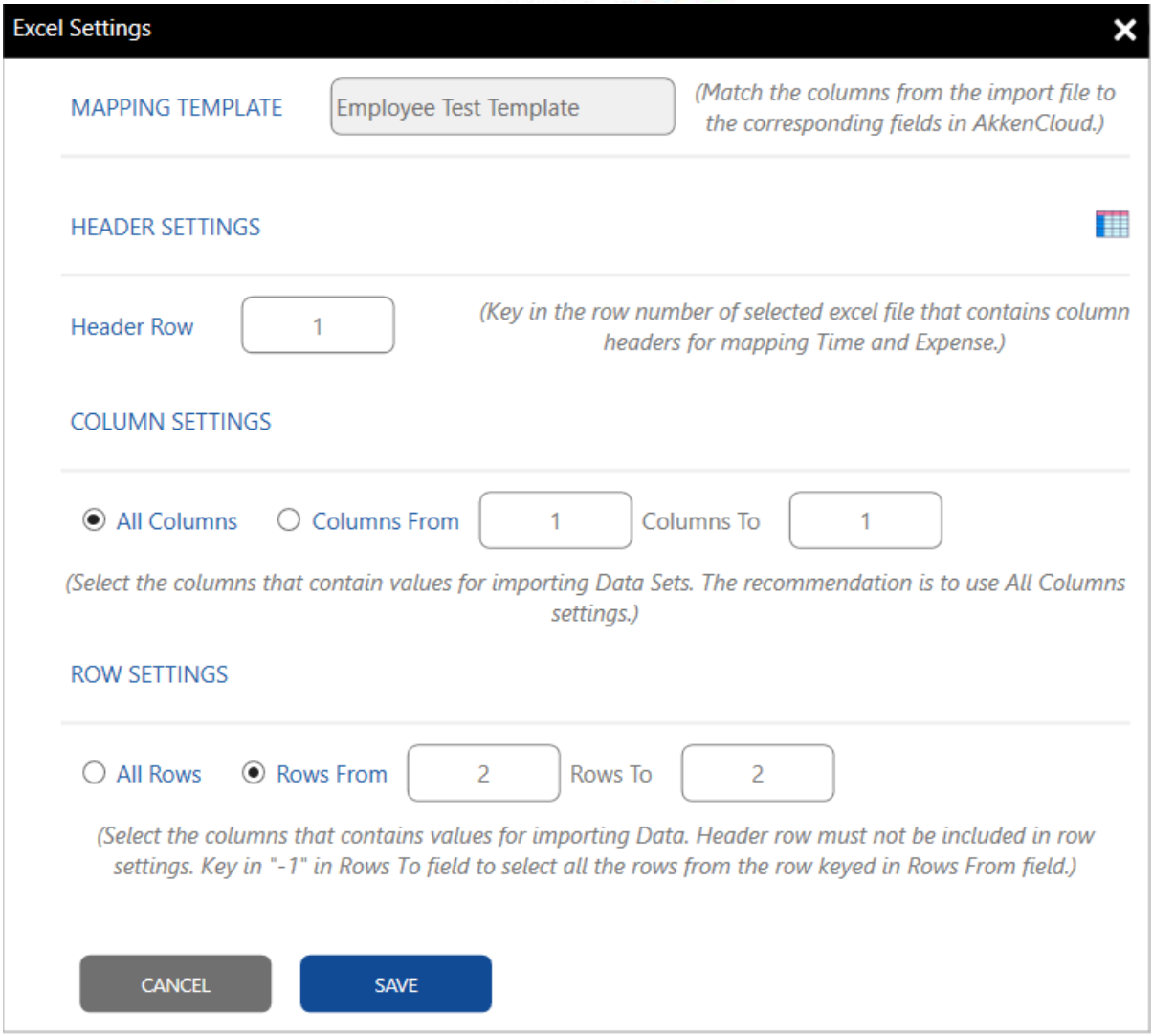
Delete a Mapping Template:

Clicking on icon will allow user to delete the selected template. A confirmation prompt is provided for the user to reconfirm deletion. Once deleted, the template and its mappings cannot be recovered. Below is the sample prompt.



Modifying Excel Setting of a template:

Clicking on icon in the template opens excel settings. These settings have the detail of header row, range of rows to be processed. Setting up excel settings prior to mapping is always a good practice. Below is the sample excel settings screen.



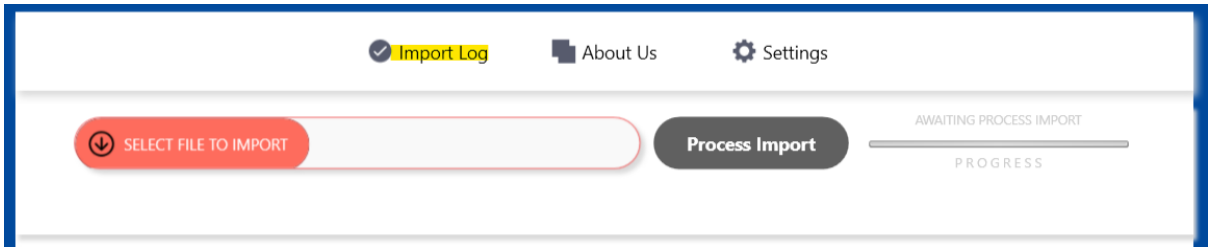
Like the mapping screen, by clicking the grid it will display uploaded file data and help the user to validate the settings.

6.3 Dashboard Menu's

6.3.1 Import Log

AkkenCloud Import records import sessions behind the scenes. These recordings are used to notify the user if any imports are in progress when logged in or to track how many timesheets/expenses were imported. The user can click on "**Import Log**" menu on the dashboard to open the list as shown in the below image.

Note: The lists are shown for last 3 months only.



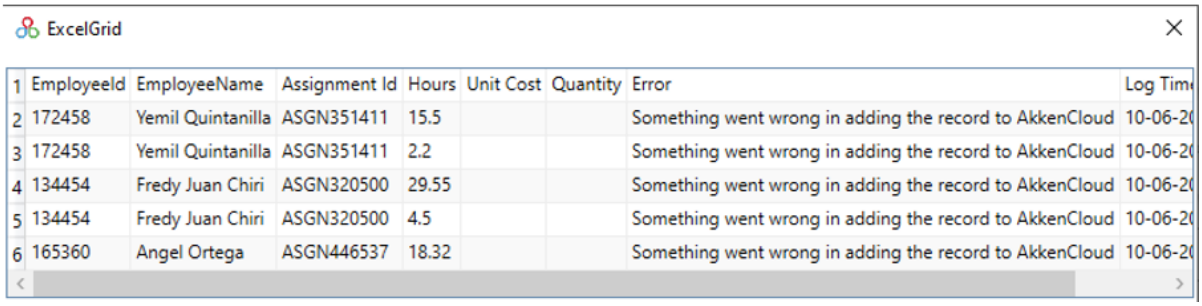
The batch list is ordered by created date with most recent records on top. This grid has a column named "**Have Errors**" which has the values of No and Yes. This depicts if the import batch had any errors while processing. Double clicking on the row opens batch error details.

ExcelGrid

	1	2	3	4	5	6	7	8	9
1	Batch Id	File Name	Total Timesh	Imported Timeshe	Import Type	Import Status	Start Time	End Time	Have
2	19	67-Import.xlsx	6	6	time	completed	10-05-2021 05:27:01	10-05-2021 05:27:01	No
3	18	67-Import.xlsx	6	6	time	completed	10-05-2021 03:07:47	10-05-2021 03:07:47	No
4	17	67-Import.xlsx	26	26	time	completed	10-04-2021 10:05:32	10-04-2021 10:05:38	No
5	16	67-Import.xlsx	6	6	time	completed	10-04-2021 09:25:05	10-04-2021 09:25:06	No
6	14	Expenses 0411.0417.xlsx	8	8	expense	completed	09-30-2021 19:18:41	09-30-2021 19:20:36	No
7	13	Expenses 0411.0417.xlsx	8	0	expense	completed	09-30-2021 19:17:15	01-01-0001 00:00:00	No
8	12	Expenses 0411.0417.xlsx	8	0	expense	completed	09-30-2021 19:00:46	01-01-0001 00:00:00	No
9	8	67-Import.xlsx	9	9	time	completed	09-30-2021 14:48:42	09-30-2021 14:49:34	Yes
10	7	67-Import.xlsx	4	4	time	completed	09-30-2021 14:17:00	09-30-2021 14:17:41	Yes
11	6	67-Import.xlsx	5	5	time	completed	09-30-2021 14:10:28	09-30-2021 14:11:18	Yes
12	5	67-Import.xlsx	9	9	time	completed	09-30-2021 13:14:52	09-30-2021 13:15:53	Yes
13	4	67-Import.xlsx	9	9	time	completed	09-30-2021 12:52:41	09-30-2021 12:54:09	Yes
14	3	67-Import.xlsx	9	9	time	completed	09-30-2021 12:34:39	09-30-2021 12:35:22	No
15	2	67-Import.xlsx	6	6	time	completed	09-30-2021 12:28:41	09-30-2021 12:29:14	No
16	1	67-Import.xlsx	6	0	time	completed	09-30-2021 12:26:21	01-01-0001 00:00:00	No

If there are no batch errors when a batch is double clicked, ACI prompts the user that there are no batch errors.

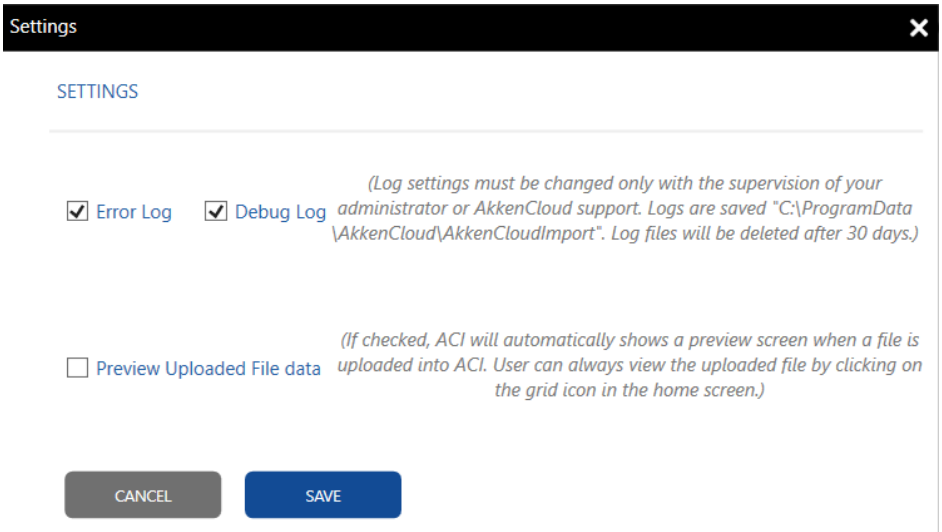
If there are errors in the selected batch, then a new grid opens showing the details of the error and the details of the record that errored.



	EmployeeId	EmployeeName	Assignment Id	Hours	Unit Cost	Quantity	Error	Log Tim
2	172458	Yemil Quintanilla	ASGN351411	15.5			Something went wrong in adding the record to AkkenCloud	10-06-2
3	172458	Yemil Quintanilla	ASGN351411	2.2			Something went wrong in adding the record to AkkenCloud	10-06-2
4	134454	Fredy Juan Chiri	ASGN320500	29.55			Something went wrong in adding the record to AkkenCloud	10-06-2
5	134454	Fredy Juan Chiri	ASGN320500	4.5			Something went wrong in adding the record to AkkenCloud	10-06-2
6	165360	Angel Ortega	ASGN446537	18.32			Something went wrong in adding the record to AkkenCloud	10-06-2

6.3.2 Settings

The settings screen includes application-level settings. Log settings is one of the application-level setting. When user clicked on "**Settings**" menu on the dashboard, a settings window opens, and user can enable or disable respective settings. Below is the sample screen.



By default, Error log is enabled. Debug logs can be enabled by selecting the debug log check box and clicking on save button. User is not allowed to enable debug logs without prior request to their administrator or the AkkenCloud Team.

All the logs are saved for 30 days. After which the log files are deleted. The default location of the logs is "**C:\ProgramData\AkkenCloud\AkkenCloudImport**".

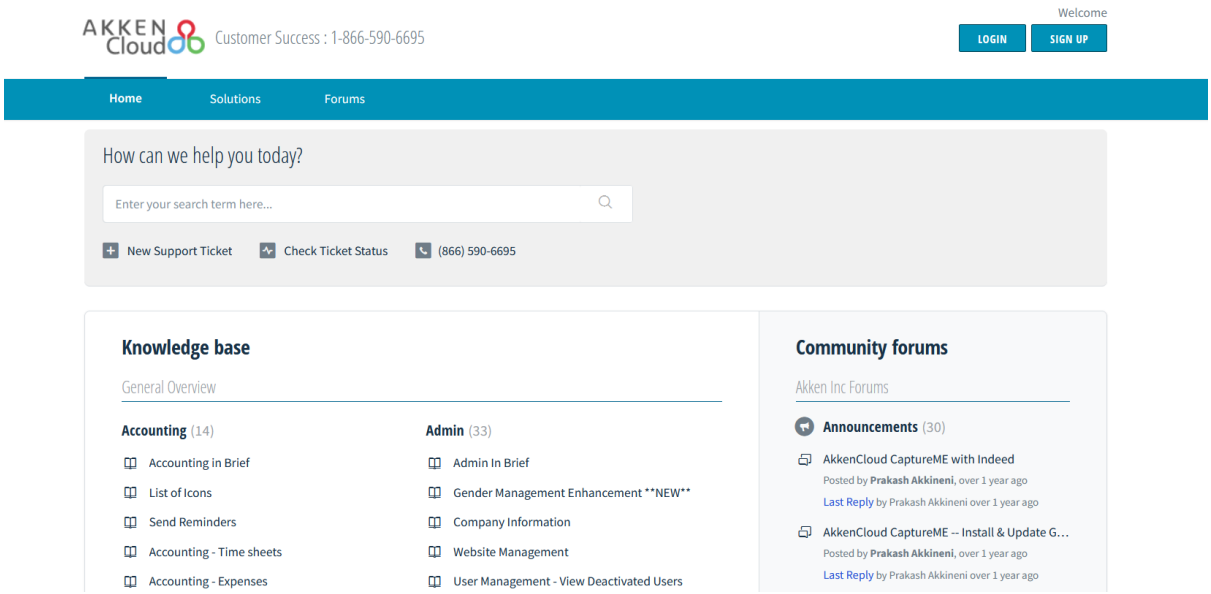
The Preview Uploaded File Data helps a user by always displaying the uploaded file data after successfully uploading a file.

6.3.3 About

About menu displays the installed version, support link etc. Below is the sample screen when user clicks on About menu from dashboard.

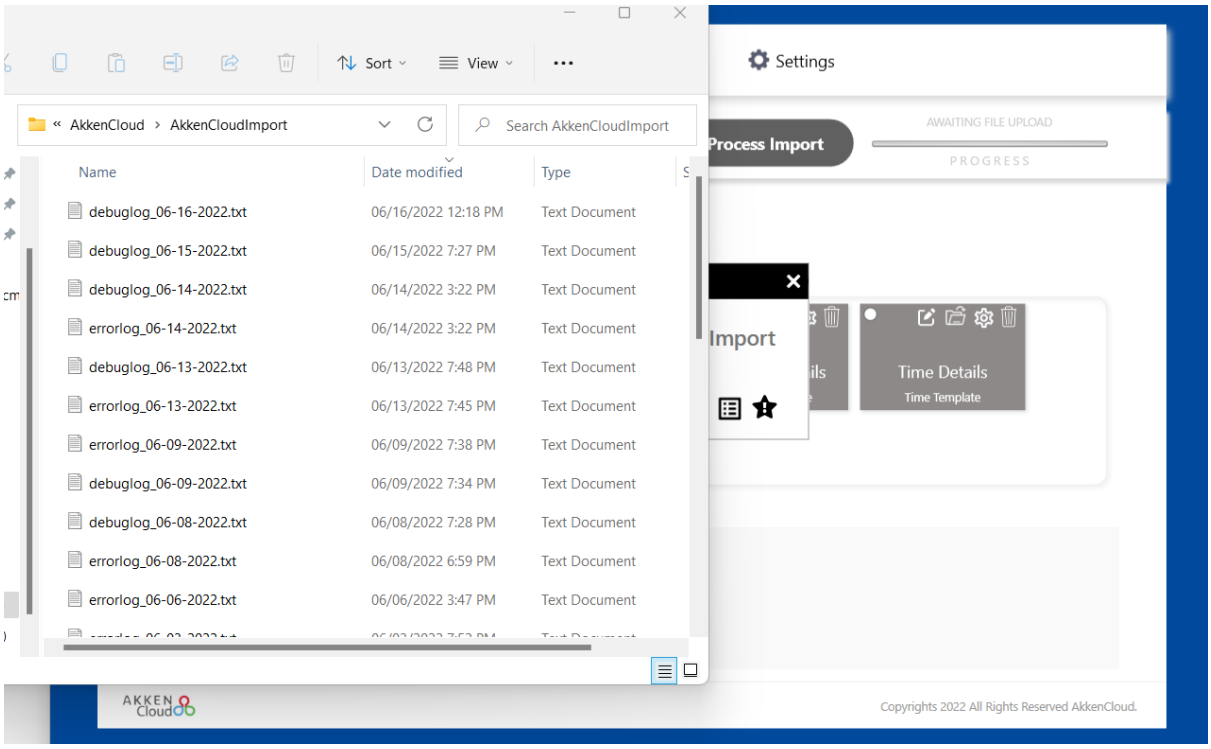
Support:

Clicking on the support Icon will open the AkkenCloud support portal. A user can open a new ticket, explain their issue, and submit the ticket to the Customer Success team who will work to investigate and resolve the issue. Below is the sample image.



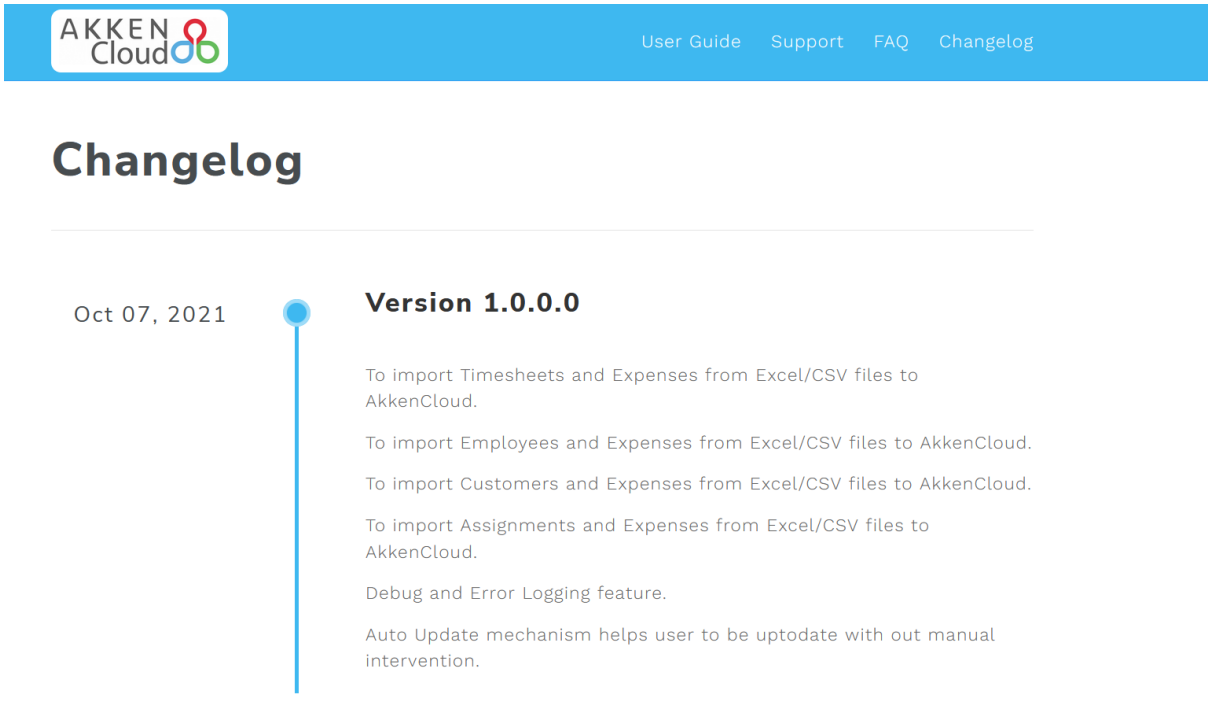
View Logs:

This opens up ACI logs location. Logs are text files that will contain details of errors and debug points of ACI functionality. These logs track every action that is performed in ACI.



What's New:

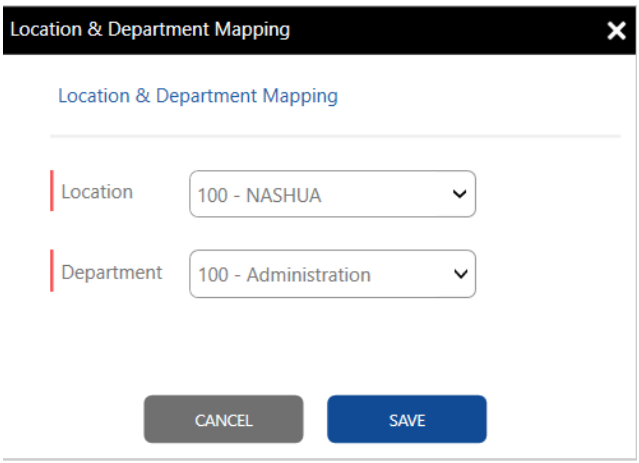
Clicking on this will take to change log screen. This contains all the details of latest changes of the ACI. Below is the sample screen.



6.3.4 Location and Department Selection

In AkkenCloud, certain values/fields are mandatory to create or update data sets. All the HRM data is segregated based on the department. **When importing Employees, Customers and Assignments, selecting Location and Department is mandatory**.

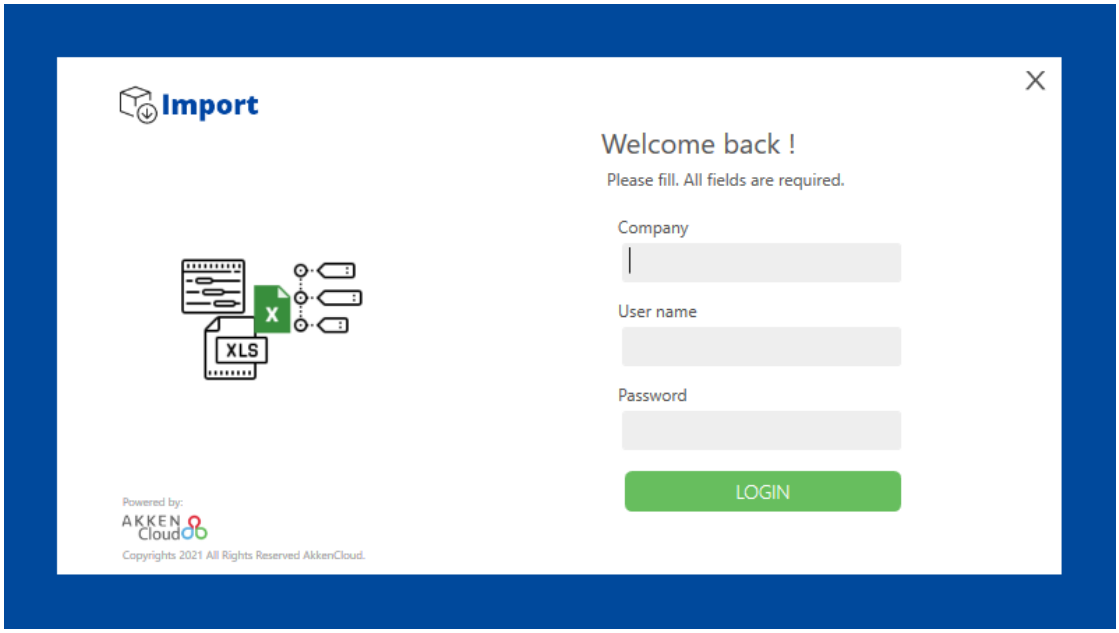
This selection is done as a step before starting the validation process (Process Import Stage). After the user selects these values, AkkenCloud Import continues Processing the data. A user will be able to import data sets for a particular location/department one at a time as shown below.



Once Location and Department are selected. Clicking on save will resume the process import. Data imported from ACI will be associated with selected Location and Department in AkkenCloud.

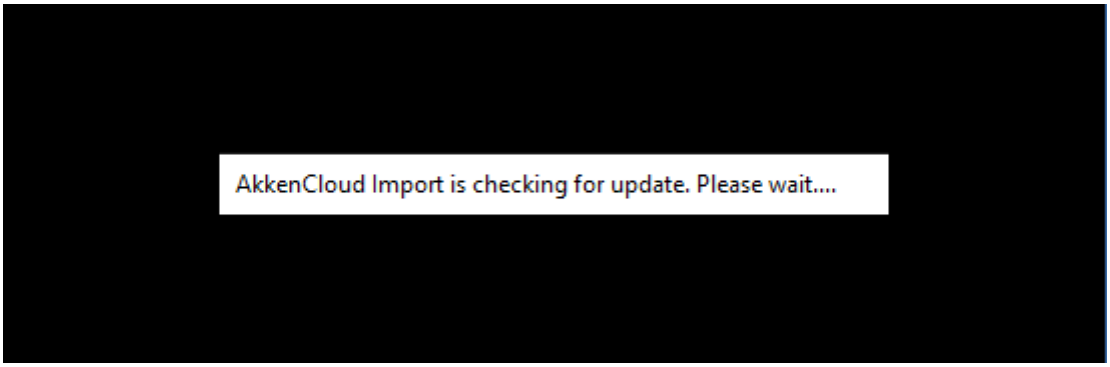
7.0 ACI Functional Flow

This section explains the functional flow of ACI and presumes the ACI application is installed and ready to be launched. When a user opens ACI, the below login screen opens.

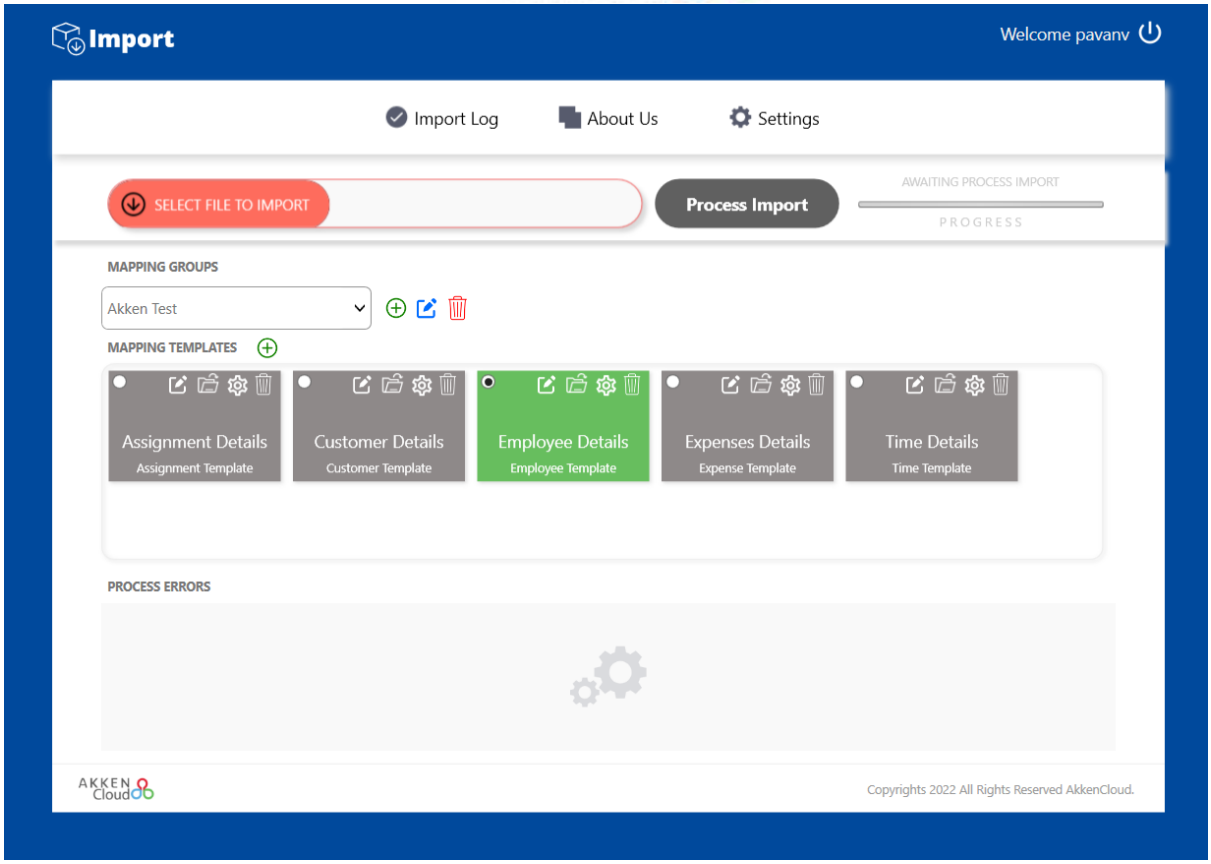


The user will have to key in their AkkenCloud Credentials and click on "**Login**". If the credentials are authenticated and authorized, dashboard screen opens. If not a message with a reason is displayed to the user.

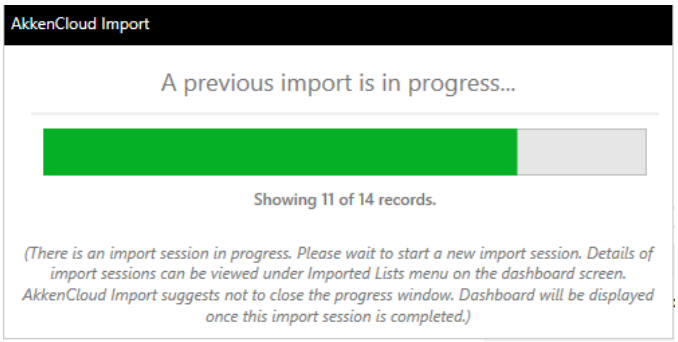
Once logged in successful, ACI checks for updates available. Below is the sample screen.



Once the update check is completed, if there is an update available for ACI, an update prompt is shown to the user. A guide to auto update is explained in section **4.0**. If there is no update available, dashboard screen opens. Below is the dashboard screen.

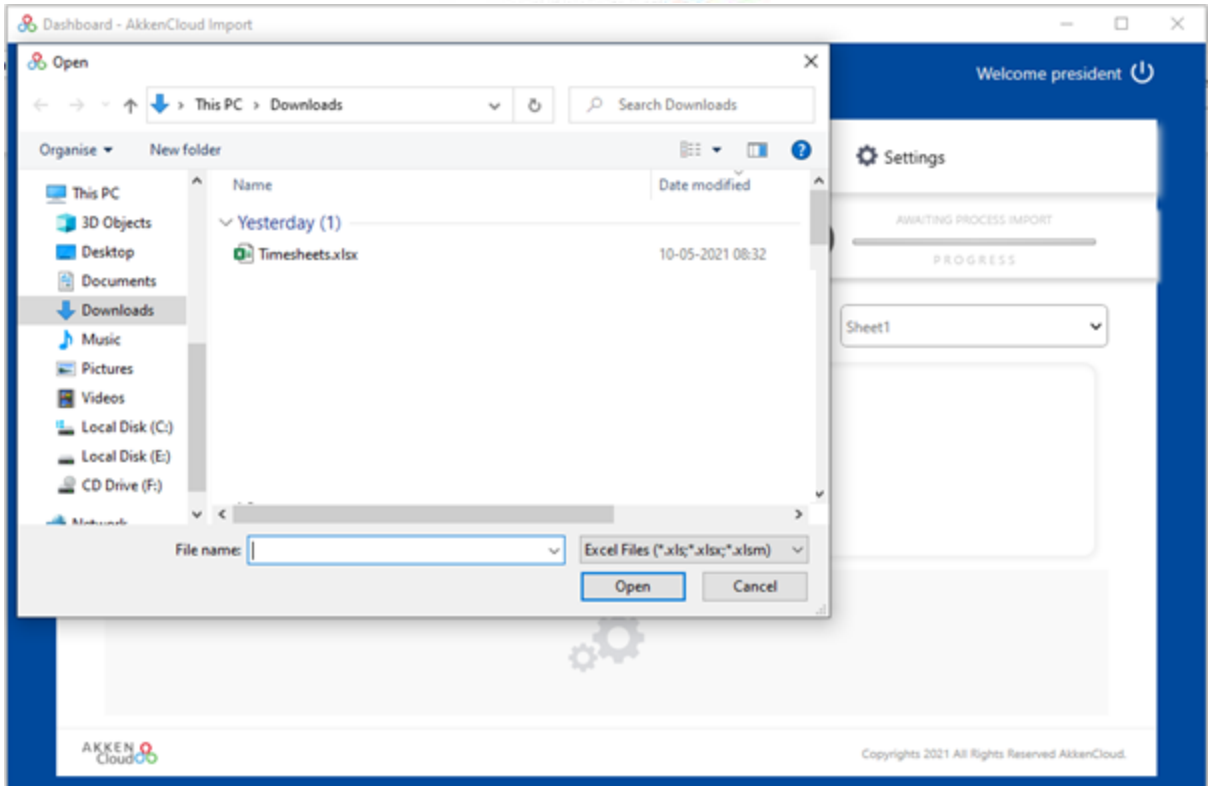


While logging in, if ACI determines that there is a previous import session in progress, it will not allow to create a new session. The dashboard screen is not shown, but an intermediate screen called "**In Progress Processing**" opens as shown below.

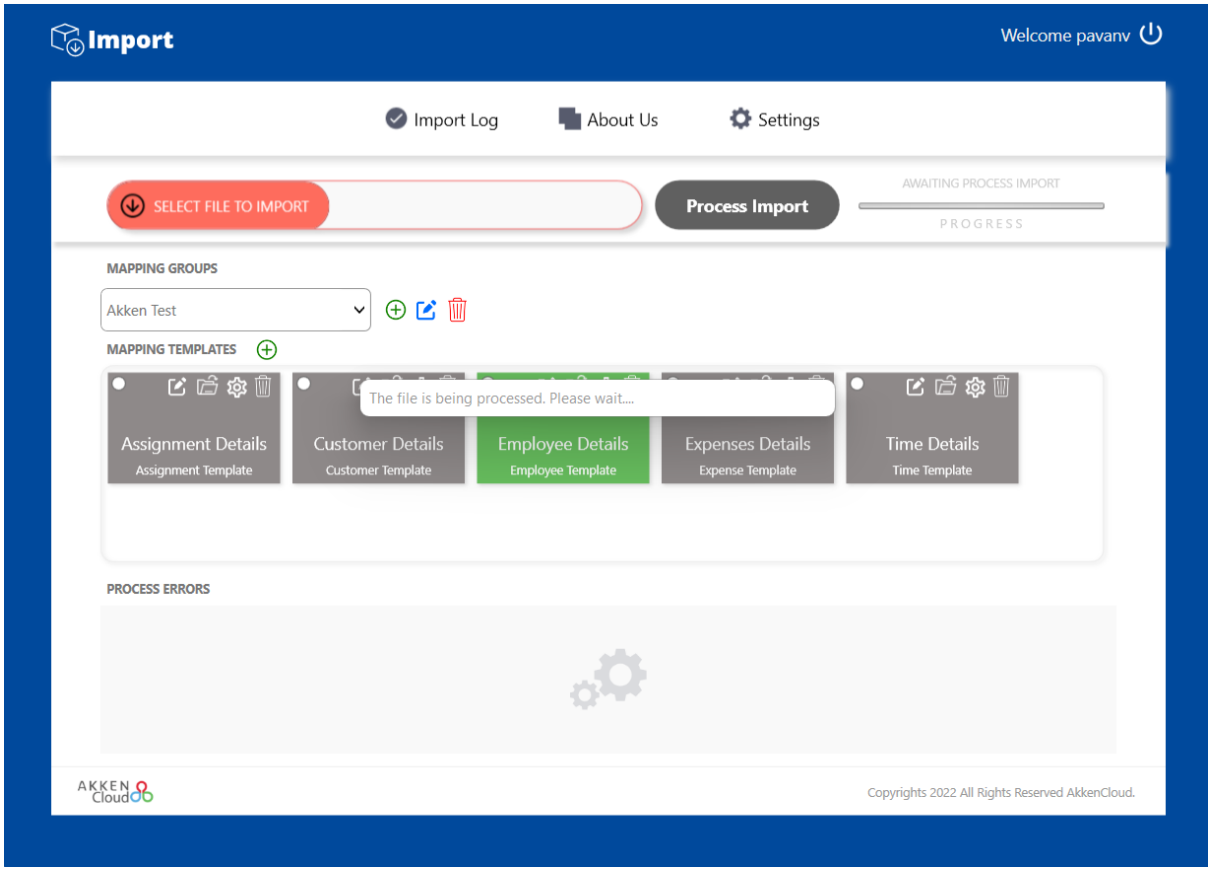


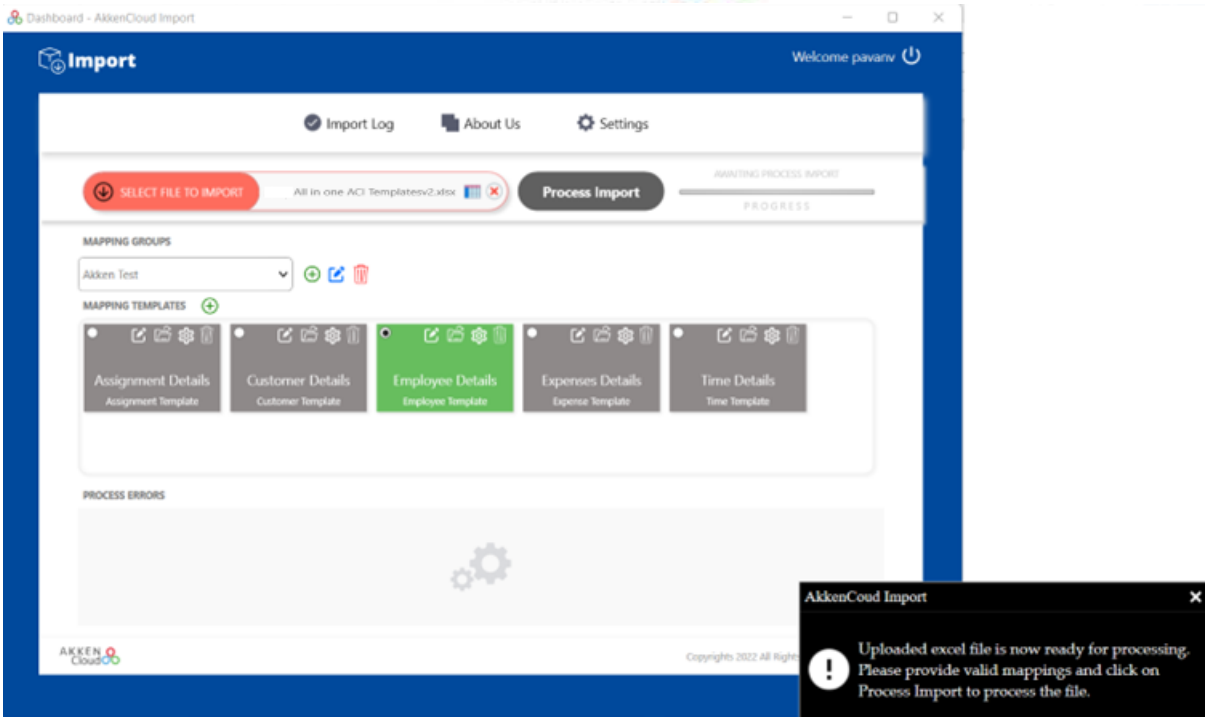
After the completion of the in-progress import, ACI will display the dashboard to start a new session.

Assuming mapping groups, templates and mapping for specific file is setup, the first step is to upload a desired file which needs to be processed by clicking on "**Select File To Import**" button. ACI allows only Excel Files (.xlsx, .xls, .xlsm) and CSV files to be uploaded. The user can select the file from the file dialogue opened by ACI as shown below.



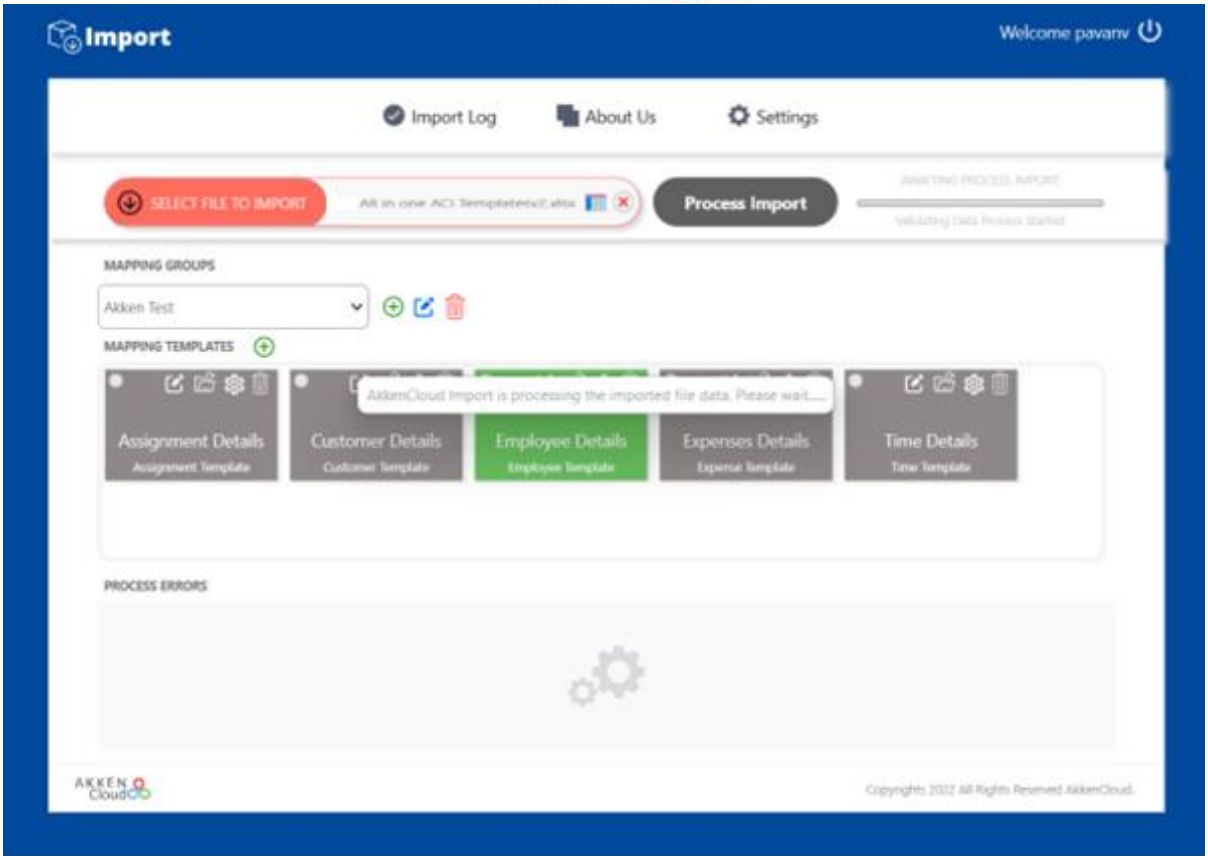
Once the file is selected, ACI parses the file into the necessary digital format. ACI also shows a notification after the parsing is completed as shown in the below image.



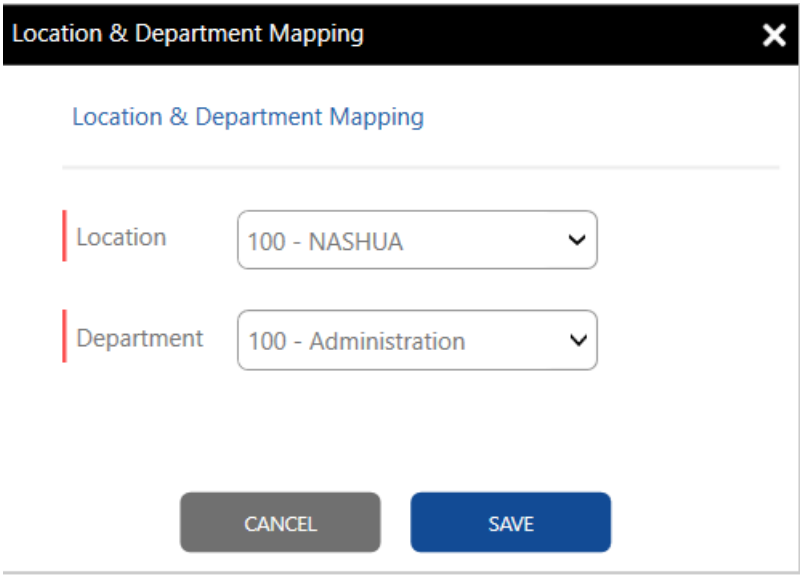


Now the stage of ACI changed from Awaiting File Upload to Awaiting Process Import. The file is uploaded and ready to be processed. (be sure template mappings and excel settings are setup).

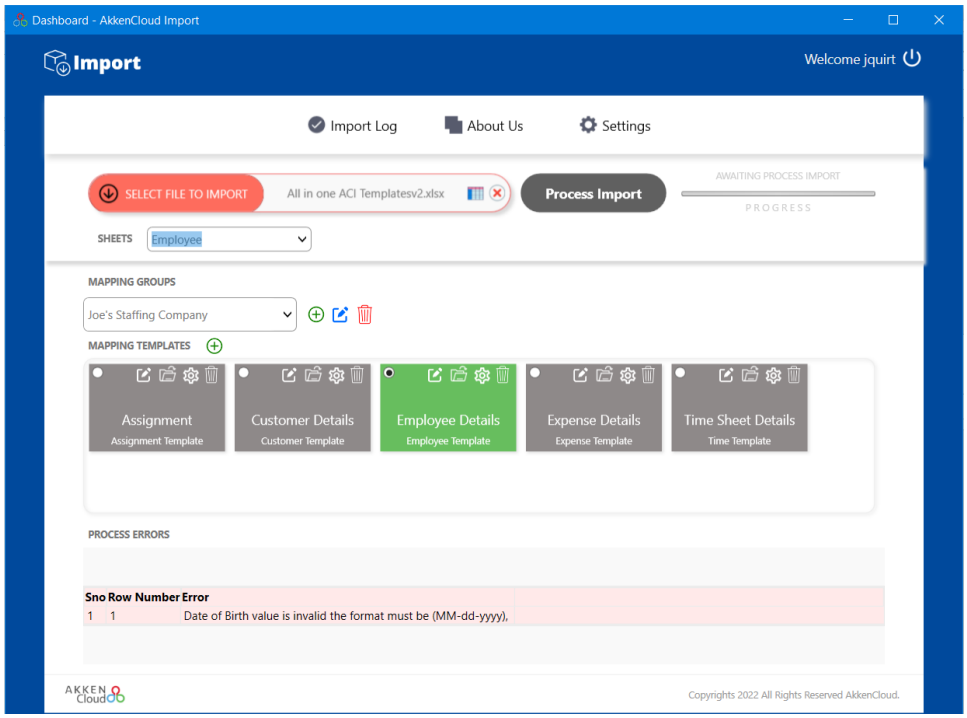
Click on the "**Process Import**" button to process the data in the file. Processing validates the data with respect to the mappings provided in the active template. Below is the sample screen when user clicks on process import button.



If a user starts processing Employee, Customer or Assignment data sets, an additional step of selecting relevant Company, Location and Department is required. Below is the sample image for the same.

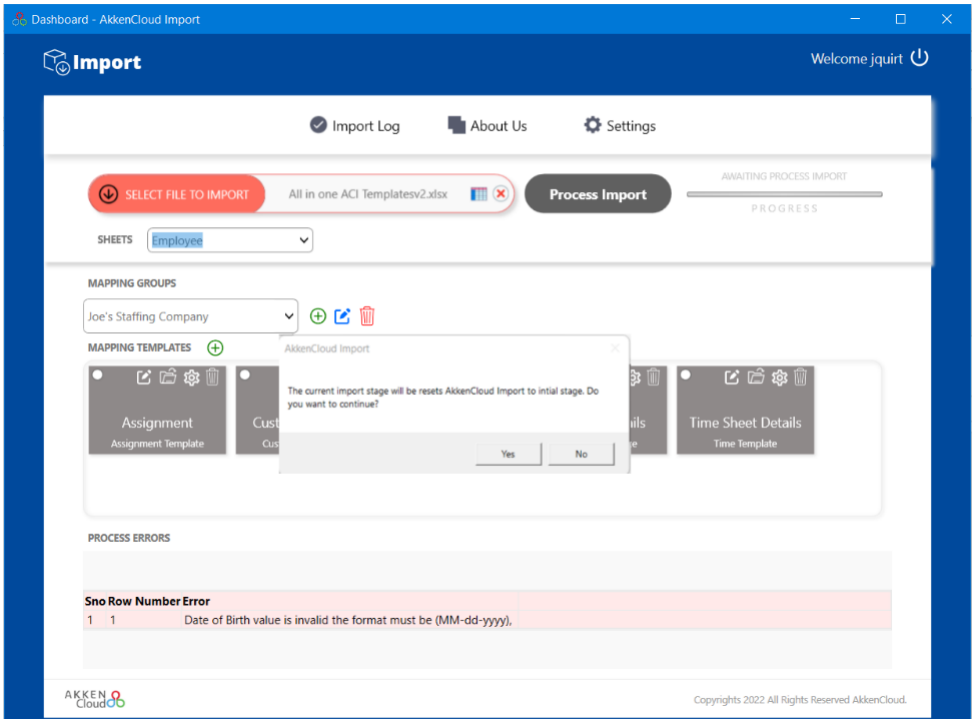


ACI will not be activated for any other action while processing progresses. Once complete, a success notification is displayed to the user as shown in the image below.

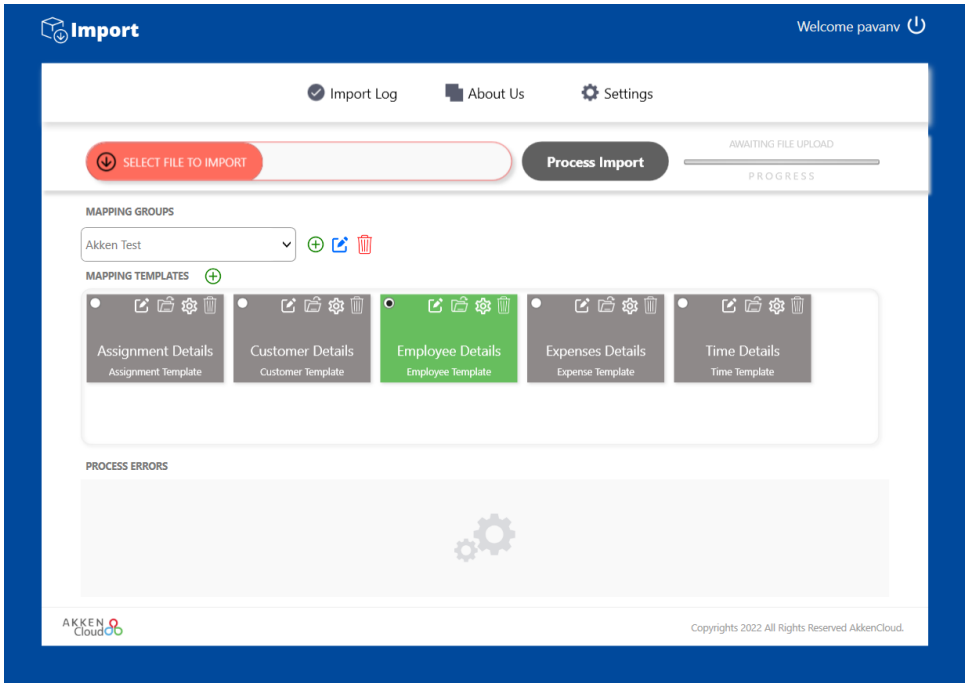


If the processing has any errors, ACI displays these errors in the bottom grid of dashboard screen, as show above.

If the user wants to change the data of the file to correct the displayed errors, they can open the excel file and make necessary modifications. To bring ACI to its previous state, user can click on the stop icon provided beside the stage notifier "**Awaiting Commit Import**". Below is the sample screen when user clicked on the stop button.



Clicking on "**Yes**" will change ACI stage to Awaiting Process Import as shown below.

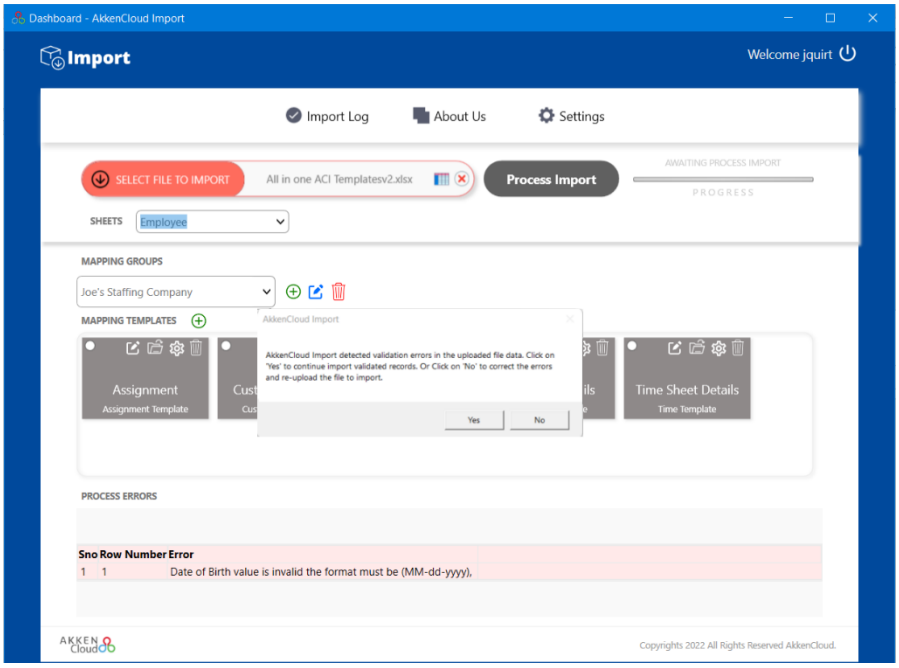


Now user can upload the updated file again by clicking on "**Select File To Import,"** verify the mappings again and start processing the import by clicking on the **"Process Import"** button.

Note: *Changing the file data may affect the mappings especially when the column names of the file are changed, Mappings must be re-checked and pointed to updated columns for a proper data processing.*

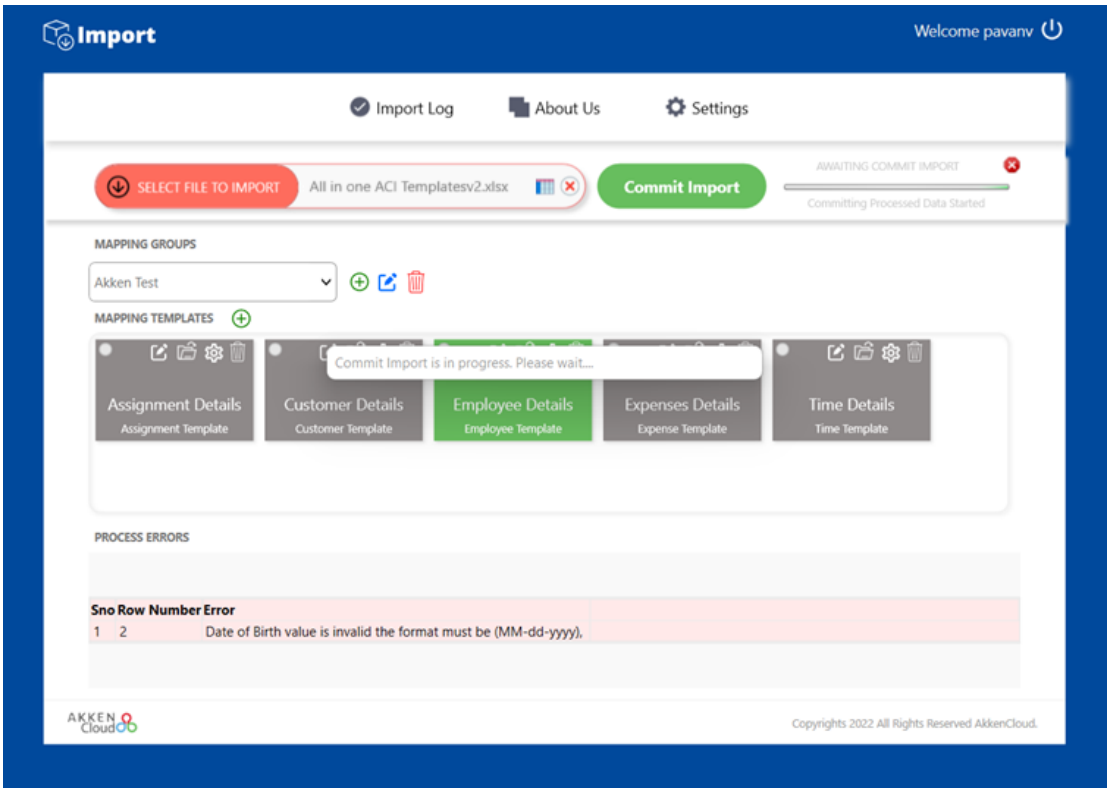
The user can do this process until all the errors are cleared in the grid. ACI allows the user to commit the import though there are errors. In this case only the processed data will be imported to AkkenCloud, and the rows with errors will be left out.

If there are errors and user clicks on Commit Import, then a prompt is displayed to confirm committing the processed data, as shown below.



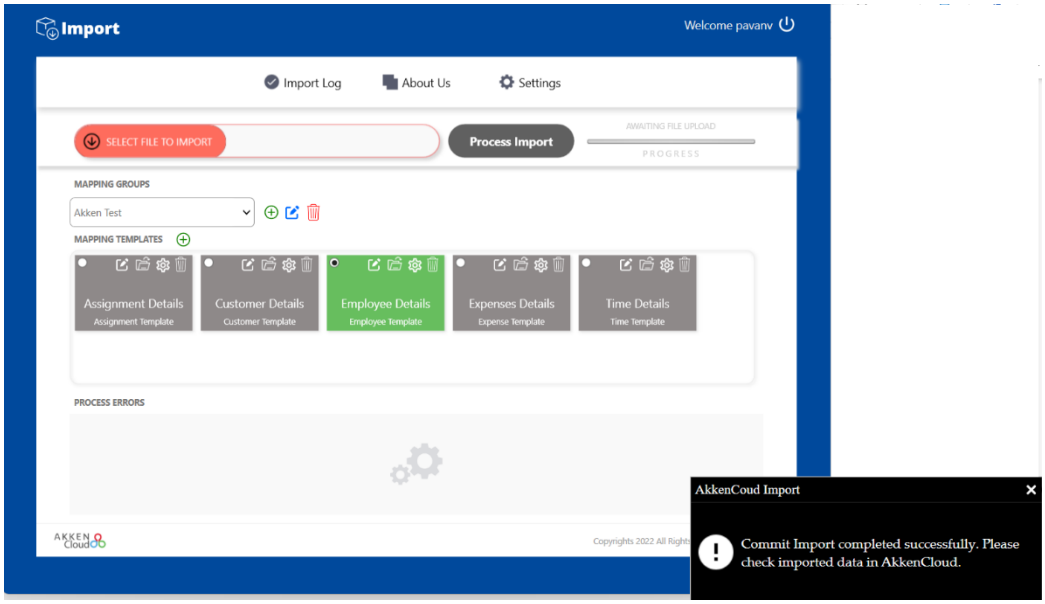
If **"No"** is selected, ACI resets the state to "Awaiting file Upload."

Below is the sample screen shown when a user clicks on the "**Commit Import**" button.



Once "Commit Import" is completed, ACI provides a successful notification and reverts back to starting stage of the process. Below is the sample screen.

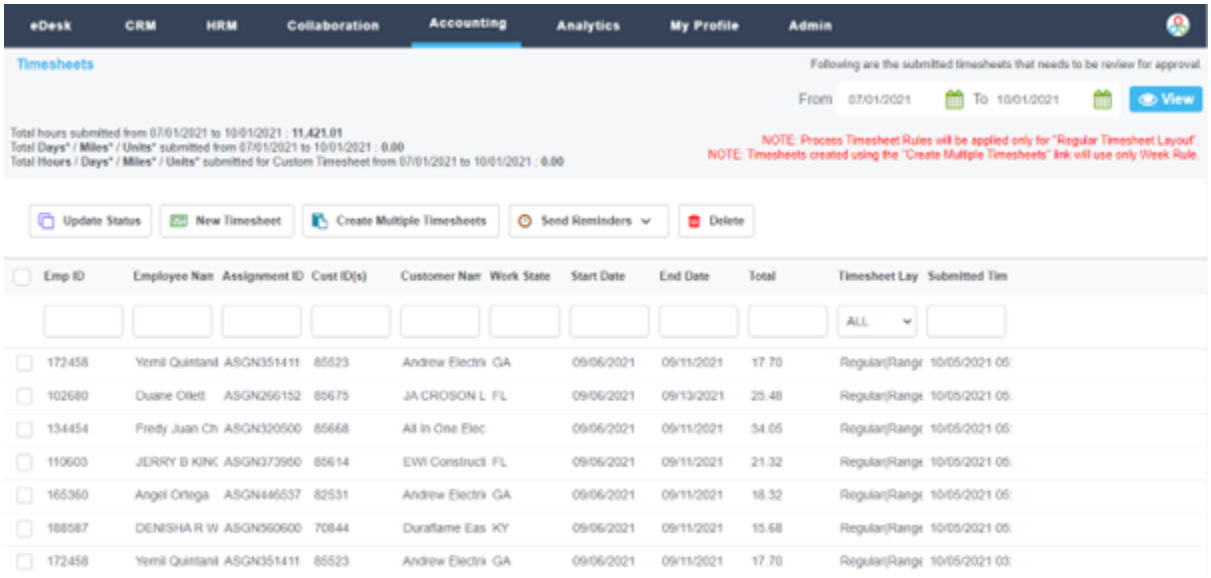
Note: *If there are multiple sheets in the uploaded file, ACI reverts to "Awaiting Process Import." If the uploaded file has one sheet ACI reverts to "Awaiting File Upload" stage.*



Data Validation in AkkenCloud

After completing the import processes, a user should always check the uploaded data sets by logging in to AkkenCloud application. Below is the illustration of Timesheets: **Accounting >> Timesheets**

Note: *Based on the mapping provided in the template mapping, timesheets can be imported as submitted or approved. The location of the submitted timesheets in AkkenCloud is* ***Accounting >> Timesheets****. The location of approved timesheets is* ***Accounting >> Timesheets >> Approved Timesheets***



User can check the last three months of import details "**Imported Lists**" menu from dashboard.

8.0 Dataflow

Data sets must be imported in a sequence of Customer, Employee, Assignment, Timesheets and Expenses for a proper payroll processing. Assignments will be imported as expected only if relevant Employee and Customer records are already existing in AkkenCloud. Similarly, timesheets and expenses. So, for a proper data imports following sequence is suggested.

9.0 Assumptions

1. AkkenCloud Import can be used as a replacement of Time and Expense Import tool.
2. All the existing TAXI mapping templates will be brought over to ACI. With small modifications by the user, these templates are ready for the usage with ACI.
3. ACI must be enabled to the company at company level (by AkkenCloud) and also for the user in **Admin >> User Management >> User Preferences >> Plugins.**
4. Company, Location and Department setup is done in AkkenCloud and can be selected while using ACI.