FIN098 Remaining User Stories at project closure

Key	Summary	Priority	Description
FIN098-212	Can the icon colours be amended	Must Have	Can the icon colours be amended? Edit Claim, Edit Claim Line, Attach Receipt, Copy Claim Line and Print Claim icons are all the same (blue) colour. The new icons are a real improvement on the previous versions but the colours are fairly limited and could potentially lead to user confusion and the clicking of the wrong icon. Also, could the icon header 'options' have a capital 'O' please?
FIN098-131	Default cost centre/job code/approval group	Should Have	As a Claimant I want the cost centre, job code & approval group to default to standard values when adding a claim item So that I don't have to keep selecting the standard values every time, only when they are different
FIN098-168	Add Claim Item screen - Job Code/Cost Centre search	Should Have	As a.... Claimant I need....on my cost centre and job code drop down list to be filtered when I start entering a code for example typing 4160 to show all 4160xx Cost Centres So that...I can quickly find the codes required without having to scroll down past all cost centres/job codes to find the correct code.
FIN098-135	Account codes not mandatory on expense type set-up	Should Have	As an Administrator I want only one account code to be mandatory when adding/editing expense types So that I can leave the research or non-research one blank if it's not applicable

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FIN098-184	Improvements to approve/unapprove	Should Have	Can the email generated to the claimant advising the claim has been unapproved include the name and approval group of the approver who has unapproved the claim? The Claims Waiting Approval screen should display the claim status (submitted, approved or part approved) as when a claim has been submitted to 2 groups and an approver has approved their part of the claim, the claim will still appear in their list to be approved (even though there is no further action they can take)
FIN098-34	Delete Claim	Should Have	As a...Claimant I need...be able to delete a claim So that...I can start over if the claim isn't valid
FIN098-72	Approver to modify Claim	Should Have	As a...Approver I need...modify the details of a claim So that...I can correct minor mistakes
FIN098-156	Claim Lines screen to include approval group, cost centre, job code, gross value, net value and VAT value.	Should Have	Can the Claim Lines screen include fields for approval group, cost centre, job code, gross value, net value and VAT value.
FIN098-56	Setup User as eFin Supplier	Should Have	As a...School Administrator I need...the user to be added to eFinancials as a supplier So that...the users expenses can be paid
FIN098-214	Fixed rate expense type improvements	Should Have	when the user enters the quantity, the calculation should be displayed on the screen (currently the user is returned to the claim lines screen)

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Key	Summary	Priority	Description
FIN098-209	Limit claim lines to £999,999.00	Should Have	As a Financial Controller I want individual claim lines to be restricted to £999,999.00 So that claimants are prevented from accidently entering extremely large amounts
FIN098-201	Financial limit on approval	Should Have	As an approver I need to be prevented from approving any claims with a total value over my approval limit (as defined in eAuthorisations) So that I don't exceed my financial authorisation limits
FIN098-213	Small enhancements to 'Print Claim'	Should Have	1. Can the logo at the top of the print be changed to remove the blue colouring as this will empty printer toners quickly so perhaps a blue box outline with a white content and black text? 2. In the print mock-up the claim reference was displayed in it's own box - can a box be included with the claim reference to make it more prominent please.
FIN098-145	Claim Reference needs to be added to messages	Should Have	As a..... Claimaint/Approver I need..... the claim reference to be included in all messages so that.... I know which claim the message relates to
FIN098-22	Sort Claim Items	Could Have	As a...Claimant I need...sort my claim items So that...I know I have not missed any items

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Key	Summary	Priority	Description
FIN098-190	Show field type on custom field screen	Could Have	As an Administrator When I'm adding/amending custom fields to an expense type I want the screen to show the field type (like 'list type' does) So that screens are consistent for all field types and I know what type of field I'm adding
FIN098-116	Users can only log in x times	Could Have	As an administrator I want users to only be able to log in x times So that the system is more secure and users don't share passwords with others
FIN098-100	Graphic design	Could Have	As a user I want the colours of the screens to have more colour and impact So that I will feel the application is new and fresh
FIN098-186	Interactive myEd Portlet	Could Have	As a ..... user I want to ..... view my outstanding claims via myEd so that ..... I can quickly see my claims via myEd
FIN098-126	Improve screen prints	Could Have	Screen prints via browser have strange urls and screen wrapping - see what can be done to improve this

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FIN098-49	Favourite Financial Codes	Could Have	As a...Claimant I need...list of favourite financial codes So that...don't have to go through the whole list every time
FIN098-14	Restrict Expense Types	Could Have	As a...Claimant I need...only see the expense claim types (Account Code) that are valid for my Job Code (research code) So that...I only see valid expense types
FIN098-24	Search Claim Items	Could Have	As a...Claimant I need...to be able to search through my claim items So that...I don't claim for something twice
FIN098-52	View Outstanding Claims	Could Have	As a...School Administrator I need...to see a list of all outstanding claims in my Dept (Approval Groups) So that...I can take action to get the claims approved
FIN098-26	Copy Item details	Could Have	As a...Claimant I need...enter the details of a trip without re-keying the details So that...I don't have to constantly re-type the data

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Key	Summary	Priority	Description
FIN098-46	Additional Reseach Information	Could Have	As a...Financial Controller I need...additional information captured for research job codes So that...we can report to sponsors
FIN098-50	AP to attach documents	Could Have	As a...Accounts Payable I need...attached documents to a claim So that...I can get rid of the paper copy
FIN098-47	View Total Owed	Could Have	As a...Claimant I need...see a total owed on my dashboard So that...it is clear what expenses are outstanding
FIN098-134	Display contextual help for core fields	Could Have	As an Administrator I want users to be offered contextual help for core fields So that they can get help on what to enter
FIN098-142	Show who created user in eAuth	Could Have	As a claimant I want to see who created my user id in eAuthorisations so that I can contact them if it's not correct

Key	Summary	Priority	Description
FIN098-108	Preview expense type set-up	Could Have	As an administrator I want to preview the expense type I'm editing So that I can check how the input form will look to end-users
FIN098-162	My Details content to be displayed	Could Have	Can My Details include Name, UUN, E-mail, Staff Number, Sub-Ledger, Added Date, Added by Person. Sub-Ledger would be drawn from the eAuthorisations record which should differentiate what the user is (i.e. Staff, Student, Visitor). So if possible, sub-ledger would be transferred based on the following;- P01 - UUN begins with 'V1' then a numeric P02 - UUN begins with anything other than beginning with 'V1' or 'S' and numeric P06 - UUN begins with an 'S' then a numeric 'Added by person' would just transfer the administrator who submitted the user's details in eAuthorisations - i.e. like a name stamp or track status transfer. It should only be transferred once at user creation stage.
FIN098-150	Divide Claim Line	Could Have	As a...Claimant I need.....divide a claim line So that....I can divide a claim line in two

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Key	Summary	Priority	Description
FIN098-189	Expense category & type to be independant lists	Could Have	As a claimant When I'm creating a new claim line, I want to be able to not select Expense Category so that I'm presented with a list of all Expense Types in the dropdown list So that I can just have one mouse click to select the expense type I want
FIN098-85	Request a cash advance	Could Have	As a Claimant I want to request a cash advance So that I can have cash to pay for expenses on my trip
FIN098-87	Reject a cash advance	Could Have	As an Approver I want to reject a cash advance request So that I can return it to the claimant for additional detail
FIN098-86	Approve a cash advance	Could Have	As an Approver I want to approve a cash advance request So that my staff can get the money they need for their trip
FIN098-42	EPIC: Cash Advances	Could Have	As a... I need...handle cash advances So that...

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Key	Summary	Priority	Description
FIN098-95	Select core fields	Could Have	As an Admin I need to be able to select which core fields to display for each expense type So that I can ensure only relevant fields are displayed for users to complete when entering expense claims
FIN098-83	Rail station codes	Could Have	As a Claimant I want the system to offer me a list of train station codes for both departure and arrival stations when I'm entering a claim for a train journey So that the Transport Office don't have to ask me for separate information
FIN098-82	IATA airport codes	Could Have	As a Claimant I want the system to offer me a list of IATA codes for both departure and arrival airports when I'm entering a claim for a flight So that the Transport Office don't have to ask me for separate information
FIN098-173	Manually Disable eFinancials Transfer	Could Have	As an...... Administrator I need to..... manually disable/enable the eFinancials Transfer So that.... I can stop the transfer to prevent problem running other processes in eFinancials.

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FIN098-188	PCI/DSS compliance for attachments	Could Have	As am Administrator I need to ensure that attachments are compliant with PCI/DSS legislation So that hackers can't get hold of copies of people bank/creditcard statements that they've scanned in as attachments
FIN098-180	Handling of missing staff numbers	Could Have	As an Administrator I want eExpenses to handle missing staff numbers in IDM So that it doesn't produce errors when claims are interfaced to eFin
FIN098-115	Expenses disclaimer for new users	Could Have	As an administrator I want users to 'sign' a disclaimer when using eExpenses for the first time So that I know they're aware of the institutions terms & conditions relating to expenses NB: Existing Disclaimer: Before you log in you must be an authorised user of eExpenses. If you have not registered for the service click here to register. Unauthorised access is a criminal offence under The Computer Misuse Act 1990. If you are not an authorised user, disconnect NOW. All claims made on the Electronic Expenses Management System must be in accordance with the University's Financial Regulations.

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Key	Summary	Priority	Description
FIN098-127	Check Approval Managers are set up correctly	Could Have	As a system administrator I need ... a scheduled job needs to run to check if an approval group has a manager set-up and they are added to the approval group. So that ... I know that an approval group is working properly.
FIN098-175	Lock user out if not set up in eFin	Could Have	As an...... Administrator I need.... a user to be prevented from using eExpenses if they are not set up in eFin so that...; they can't create claims as they can't be processed
FIN098-165	Approval Group Search Facility	Could Have	Can a Search facility be added to the Approval Group screen as there are approximately 500 Approval Groups set up in the current eExpenses system and there is also a Search facility.
FIN098-136	Access via myEd	Could Have	As an Administrator I want users to access eExpenses via a myEd portlet So that they can continue to access the system.
FIN098-80	Custom validation rules	Could Have	As a System Admin I want to be able to create/amend custom validation rules So that I can prevent users from inputting claims that don't comply with expenses policy
FIN098-203	New custom field for variable rate (currency)	Could Have	.

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Key	Summary	Priority	Description
FIN098-13	Display Narrative on Printed Claim	Won't Have	As a...Claimant I need...appropriate text on my claim form So that...I know where to send it (and any receipts)
FIN098-19	Choose Claim Approver	Won't Have	As a...Claimant I need...choose who approves my claim (person not group) So that...I know who is approving my claim
FIN098-20	Responsive Design of System	Won't Have	As a...Claimant I need...the system to work on multiple devices So that...update my claim from any device
FIN098-164	Screen Resolution Issues	Won't Have	Larger screen resolutions seem to cause the text to leak out of their respective field/box. For example under Claim Options, if the resolution is made larger to increase the size of the fonts, the text (e.g. Withdrawn Claims) leaks out of its respective box. Under Admin Options, if the resolution is made larger to increase the size of the fonts, the text (e.g. Expense Categories) leaks out of its respective box.
FIN098-23	Display Carbon Footprint	Won't Have	As a...Claimant I need...to see my green miles So that...I can see my carbon footprint

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Key	Summary	Priority	Description
FIN098-68	EPIC: Maintain Rates	Won't Have	As a...System Administrator I need...maintain standing data So that...it is kept up to date
FIN098-132	eFin drilldown	Won't Have	As a Finance person I want to be able to use the eFin drilldown facility to look at expense details from within eFin So that I don't have to use 2 systems
FIN098-172	FIS to amend claim details	Won't Have	As an..... Administrator I need to..... be able to edit any details of a claim so that.... I can keep the details in sync if I need to fix the CLINK batches
FIN098-183	Claim Line Numbers	Un-prioritised	I have noticed when a claim is queried or recalled and a line is deleted from the claim, the claim line number of the lines below the deleted line will shift up. For example if a claim is submitted with lines 1 to 20 and the claim is queried/recalled and lines 1 to 11 are then deleted. The first line of the claim will show as line 1 not line 12. I believe we decided once a claim has been submitted the claim line ref is allocated to that line and will not change as this could cause issues with notes referring to specific lines.
FIN098-205	Variable rate expense type	Un-prioritised	As a claimant I want to be able to enter the exchange rate I paid So that I can claim foreign currency invoices

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Key	Summary	Priority	Description
FIN098-206	Can an Approvals Matrix be created to allow multiple stage approval?	Un-prioritised	An Approvals Matrix enables more than one-stage approval to take place. In other words if a claim was initially submitted to a School approval group and it was approved by that group, it would then go to the next stage in the process such as Accounts Payable approval group or Research Grant PI approval group.
FIN098-207	Standard Journey Calculations	Un-prioritised	Can standard journey calculations be hard-coded such as Old College to Little France or Kings Buildings to Roslin? This would be a set number of miles and a set value which would avoid the claimant needing to calculate the miles. Could AA or RAC Route Planner (Autoroute) be integrated or a link to allow the claimant to punch out to it?