**Travel Auth and expense claim User Stories**

Highlighted in blue – out of scope for this build

|  |  |
| --- | --- |
| **Role** | **I want to…** |
| User | Travel Auth (request approval)   * Create a new or edit an existing travel authorization request (where edit = draft)   + Define the travel steps   + define the travel method   + define the final destination   + define the purpose of travel * request a travel advance * Have the system create an estimate of my trip * Edit the estimates * Define if my travel was on the preapproved travel list * Route the approval to my supervisor * Enter GL coding for my travel if I know it (may have multiple codes) * Validate the GL code is a valid #   Travel Auth Status view   * See the status of my travel auth requests   Travel Auth (after approval)   * Receive notification that travel has been approved * Request travel desk support (flights) * Request pool vehicle (open FVRS tool at minimum (https://apps.ynet.gov.yk.ca/fvrs/f?p=410:101::::::), if can push info from travel auth to APEX form)   Expense (During travel)   * Copy my estimates for reimbursement to my expenses list (excluding flights) * edit an existing expense * add a new expense (including type, description and amount) * upload a receipt to an expense * System to calculate my per diems based on my entered travel dates and times. * To enter the exact times to my travel to account for flight delays or un scheduled changes if changed need to provide a rationale   Expense (after travel)   * Enter expenses as above * Affidavit of lost receipt (need to define if this can be a digital approval) for now just upload as reciept * To submit my travel claim to my supervisor for approval * Have the total cost reflect my travel advanced * Enter GL coding for my travel if I know it (may have multiple codes) * Print a PDF of the report * Upload a signed document   Expense Status view   * See the status of my expense claim   Travel Report   * Ensure it is filled out if travel is out of territory * Print a PDF of the report * Upload a memo |
| Supervisor | Travel Auth   * Receive notification that an employee has submitted a travel auth. Request * Reminder that an employee has sent in a travel auth request 5 business days * View my employees travel (including estimate) and either approve or decline the travel and notify the employee of my decision * If I decline I want to provide a reason * Enter or change GL coding * Reassign to another person because I do not have the correct signing authority (but add notes) * Print a PDF of the report * Upload a signed document   View all Travel (Current and Up Coming)   * Dashboard view of my staff that are currently travelling * Dashboard view of my staff that will be travelling * See all my staffs approved Travel Auth   Expense   * Receive notification that a claim has been submitted * Review expenses provided by employee and confirm that these seem correct * Reassign the claim back to the employee so that they can make changes * Reassign the claim to the person with the proper signing authority * Approve the claim * Ensure GL code has been entered and all amounts defined for each amount sum to the total claim amount * Print a PDF of the report * Upload a signed document   View expenses   * See all travel expense for my staff, include separate flight expenses and total of expense claim and flights * See all expenses that are outstanding for my approval |
| Departmental Administration | Travel Auth   * Create a travel auth for another employee within my department * To identify stalled auth requests and reassign if makes sense   Expense   * To enter all expenses on behalf of a user and submit on their behalf |
| Departmental Finance | Travel Auth   * Notification of an approved travel advance request * Define a travel advance has been processed (processed y/n, notes, #) * Download signed document   Expense   * Ability to quickly see expense and backup (receipt viewer (pdf or image) rather than download) * Ability to verify an expense claim * Ability to assign an expense claim as paid * Download signed document |

**Estimates**

Flights:

1 stop away (Vancouver, Kelowna, Edmonton, Calgary, Yellowknife): $350 per segment

Not above destinations: $1000 per segment

Private Vehicle:

Use distance between Yukon places (distance api) x private vehicle km rate (api)

Hotels:

All hotels default to $250/night

Private Accommodations:

Use perdiem apis

Per diems:

Based on perdiem api already created.

If only dates are entered calculate based on full day

if times entered calculate based on times entered if should include

**Migrations and Data**

003\_destinations.ts - provides information on travel outside of Yukon. This will be replaced with a worldwide city api ---more information to come

004\_forms.ts - provides information about the traveller, and travel details (enhances to this likely required)

005\_expenses.ts - used to add expenses to travel

006\_stops.ts - user can add stops to travel at minimum one stop should occur per travel

007\_tripreport.ts - used when trip report is required for out of territory travel

010\_audit-history.ts - used to track routing history and actions

012\_travel-purpose.ts - look-up table to define travel

013\_transport-method – look-up table to define transport method