EPS Learning:

*Expense Report Receipt Script*

Functional Consultant: Dax

Technical Consultant: Jaira

## Summary

### Issue: Validation to check if a receipt is mandatory for an Expense Report line is needed depending on the Category and amount of the line.

### Solution: Create a client script that will allow/prevent the enter of Expense Report lines based on the Category, amount and if a Receipt attachment was entered.

## Solution Design and Level of Effort

* Create a Client script applied to Expense Report.
* This script will be triggered on the following actions:
  + - Enter/Update Category (fieldChanged)
      * If Category = Travel Mileage, mark the Receipt checkbox = T.
      * Otherwise, set Receipt checkbox = blank.
    - Enter/Update Amount (fieldChanged)
      * If Category is not Travel Mileage AND Amount >= $25, mark the Receipt checkbox = T
      * Otherwise, set Receipt checkbox = blank.
    - Click ‘Add/OK’ button on expense line (validateLine)
      * If Receipt checkbox = T and Attach File is blank:
        + Do not allow adding/updating of line
        + Alert user that they need to attach receipt file
      * Otherwise, allow line update.

Level of Effort:

|  |  |  |
| --- | --- | --- |
| Customization Components | Customization Components Breakdown/Detail | Hours |
| Script Development | Client script:   * FieldChanged   + Mark the Receipt checkbox = T if Category = Travel Mileage. Uncheck otherwise.   + Mark the Receipt checkbox = T if Category != Travel Mileage and Amount >= $25 * ValidateLine   + Validate if Attach File column is populated if Receipt checkbox = T | 6 |
| Design & Solutioning |  | 1 |
| Testing/Evolution Work |  | 1 |
| Deployment/Cutover |  | 1 |
|  | **Development Total** | **6** |
|  | **Total** | **9** |

## Customization Components

<to be added when script development is completed>