ETR · EMPLOYEE TIME-OFF REQUEST

# Building the User Stories

## Translating documented requirements into role-based product behavior

The requirements document defined what the application needed to support across employees, supervisors, and administrators. I translated those requirements into user stories organized around each role's goals, workflows, permissions, privacy boundaries, and exception rules—creating a shared framework for design, development, and testing.

EPIC 1 — SECURE ACCESS

### ETR-001 — Sign in with NBCUniversal credentials

As an employee, I want to sign in with my NBCUniversal credentials so that I can access ETR without creating another account.

Source: FR-01; Business Requirements — Login

Acceptance criteria:

- The employee is redirected to NBCUniversal SSO.
- An authenticated SSO identity is matched to an active ETR employee profile.
- A matched employee is granted the permissions assigned to their profile.
- An unmatched or inactive employee receives guidance to contact a Benefits Administrator.

### ETR-002 — Access ETR away from the corporate network

As an employee, I want to securely access ETR outside the NBCUniversal network so that I can manage time off without connecting through VPN.

Source: FR-02; Business Requirements — External Access

Acceptance criteria:

- ETR is accessible both inside and outside the corporate network.
- External access does not require a VPN connection.
- The same authentication and role permissions apply in both contexts.

## ETR-003 — View benefit balances

As an employee, I want to see my available time by benefit type so that I can plan time off confidently.

Source: FR-03; Dashboard Requirements

Acceptance criteria:

- Each assigned benefit type displays its annual allotment and remaining balance.
- Used, awaiting-approval, and awaiting-withdrawal amounts are reflected in the displayed balance information.
- Negotiated days and applicable rollover values are included according to the employee's benefit configuration.
- Benefits not assigned to the employee are not shown.

## ETR-004 — View upcoming requests and holidays

As an employee, I want to see upcoming requests and company holidays on my dashboard so that I can understand my schedule at a glance.

Source: Business Requirements — Dashboard

Acceptance criteria:

- Upcoming requests display their current status.
- Selecting a request opens its detailed view.
- Company holidays are shown for the relevant 12-month period.
- Dates reflect the employee's assigned location and department configuration.

## ETR-005 — Review request history

As an employee, I want to review and filter my previous, current, and upcoming requests so that I can understand my time-off history.

Source: FR-04; View Request Page — Employee

Acceptance criteria:

- Requests are available for the prior, current, and subsequent benefit years.
- Requests can be filtered by status, benefit type, and calendar year.
- Requests are grouped by request type.
- Selecting a request opens its details and displays only actions valid for its status.

## ETR-006 — See teammate availability without private details

As an employee, I want to see when my direct teammates are taking time off so that I can plan work without seeing the private category of their leave.

Source: Calendar and “Who Else Is Off” requirements; clarified product rule

Acceptance criteria:

- The employee can see approved and awaiting-approval absences for direct teammates or members of the permitted team/project scope.
- The date or availability state is visible.
- The teammate’s benefit or leave category is not displayed.
- Employees cannot access the teammate’s request details, comments, balance, or history.

## ETR-007 — Create a time-off request

As an employee, I want to submit a time-off request so that my supervisor can review it and my balance can be tracked digitally.

Source: FR-05; Create Request Page

Acceptance criteria:

- The employee can select an eligible benefit type, date range, and permitted partial-day increment.
- Non-work days and company holidays are excluded from the requested deduction.
- Current and estimated remaining balances update in context as request information changes.
- Duplicate or overlapping requests are prevented.
- Required comments are enforced for applicable request types.
- Submission creates a pending request, recalculates the displayed balance, notifies the supervisor, and confirms submission to the employee.

## ETR-008 — Route a request exceeding accrued time for administrator approval

As an employee, I want a request that exceeds my accrued time to enter an exception workflow so that an authorized administrator can decide whether the request may proceed.

Source: Administrator exception requirements; clarified approval rule

Acceptance criteria:

- The system identifies when a request exceeds the employee's accrued or available balance.
- The employee is clearly informed that administrator approval is required.
- The request remains in an exception-pending state until an authorized administrator acts.
- The request does not become approved through the standard supervisor workflow alone.
- Approval records the authorized administrator and preserves the resulting negative or adjusted balance according to policy.
- Rejection notifies the employee and leaves the official balance unchanged, apart from reversing any temporary hold.

## ETR-009 — Cancel a pending request

As an employee, I want to cancel a request that has not yet been approved so that I can correct a change in plans without administrative assistance.

Source: FR-07; View Request Page — Employee

Acceptance criteria:

- Cancel is available only while the request is awaiting approval.
- Cancellation changes the request status and recalculates the employee's balance.
- The employee receives confirmation of the cancellation.

## ETR-010 — Withdraw an approved request

As an employee, I want to request withdrawal of an approved request so that my supervisor can review the change and my balance can be restored when approved.

Source: FR-08, FR-10; View Request Page — Employee

Acceptance criteria:

- Withdraw is available only for an eligible approved request.
- The withdrawal remains pending until the appropriate approver acts.
- The supervisor receives a notification.
- The balance is recalculated only after the withdrawal is approved.
- The employee receives the final approval or rejection notification.

## ETR-011 — Accrue time for working an observed holiday

As an eligible employee, I want to request alternate-holiday accrual so that time earned by working an observed holiday can be recorded and used later.

Source: FR-06; Proposed Future State Step 4

Acceptance criteria:

- The option appears only when enabled for the employee's department or benefit configuration.
- A date and required comment are captured.
- The supervisor is notified and must approve the accrual.
- Approved time is added to the appropriate benefit balance with its expiration rule.
- The request can be cancelled or withdrawn only when its status and usage permit it.

## ETR-012 — Receive request notifications

As a supervisor, I want to be notified when a direct report submits a request so that I can review it promptly.

Source: FR-12

Acceptance criteria:

- A notification is sent when a direct report submits a request requiring the supervisor's action.
- The notification identifies the employee and links or directs the supervisor to the request.
- Notifications do not expose unnecessary sensitive information.

## ETR-013 — Review direct-report requests

As a supervisor, I want to view and filter requests from my direct reports so that I can manage pending decisions efficiently.

Source: FR-13; View Requests Page — Supervisor

Acceptance criteria:

- Only requests within the supervisor's reporting or delegated scope are visible.
- Requests can be filtered by employee, status, benefit type, and year.
- Awaiting-approval and awaiting-withdrawal requests are visually distinguishable.
- Selecting a request opens the information needed to make a decision.

## ETR-014 — Approve or reject a time-off request

As a supervisor, I want to approve or reject a direct report's request so that the request can move to a final status.

Source: FR-14

Acceptance criteria:

- Approve and reject actions are available only to an authorized approver.
- The decision records the approver and timestamp.
- Approval or rejection updates the request status and applicable balance calculations.
- The employee receives notification of the decision.
- A request exceeding accrued time cannot be finalized through supervisor approval alone and follows the administrator-exception workflow.

## ETR-015 — Approve or reject a withdrawal

As a supervisor, I want to approve or reject an approved request's withdrawal so that schedule and balance changes remain controlled.

Source: FR-15

Acceptance criteria:

- The action is available only for eligible requests awaiting withdrawal.
- Approval restores the applicable benefit balance.
- Rejection preserves the original approved request and balance deduction.
- The employee receives notification of the decision.

## ETR-016 — Delegate approval permissions

As a supervisor, I want to delegate approval permissions to another supervisor so that requests continue moving when I am unavailable.

Source: FR-16; Alternate Approver Requirements

Acceptance criteria:

- Only another eligible supervisor can be selected as the delegate.
- The supervisor can delegate new awaiting requests, historical requests, or both.
- The delegation can have a date range or no end date.
- The supervisor can choose whether to receive copies of approval notifications.
- The alternate approver is visible to the affected employee.
- All delegated decisions record the person who took the action.

## ETR-017 — Maintain employee profiles

As a Benefits Administrator, I want to create, update, search, and deactivate employee profiles so that eligibility, routing, and benefit calculations remain accurate.

Source: FR-17; Administration — Employee

Acceptance criteria:

- Administrators can search by employee, supervisor, division, location, department, and project.
- Access is limited to assigned departments unless the user has System Administrator permissions.
- Benefits Administrators cannot edit their own profile.
- Deactivation preserves historical records.

## ETR-018 — Maintain rollover and negotiated time

As a Benefits Administrator, I want to manage rollover and negotiated vacation values so that approved employee-specific benefits are represented correctly.

Source: FR-18, FR-19

Acceptance criteria:

- Authorized administrators can update applicable year-end rollover values.
- Previous rollover values are retained for traceability.
- Negotiated days require an annual allotment and effective period.
- Calculations follow the employee’s configuration and effective dates.

## ETR-019 — Suspend vacation accrual

As a Benefits Administrator, I want to suspend vacation accrual for a defined period so that balances remain aligned during an extended leave.

Source: FR-20

Acceptance criteria:

- A reason and effective period are required.
- Suspension and resumption follow the documented monthly accrual timing rules.
- The adjustment is recorded in the employee’s history.

### ETR-020 — Manage employee requests and accruals

As a Benefits Administrator, I want to view and create employee requests or accruals so that authorized administrative actions can be completed digitally.

Source: FR-21, FR-22, FR-23

Acceptance criteria:

- Administrators can view requests and accruals within their assigned scope.
- Administrators can create only supported request, accrual, and deduction types.
- The administrator is recorded as the initiator.
- Resulting balances and request histories update according to the applicable business rules.

### ETR-021 — Approve requests exceeding accrued time

As a Benefits Administrator, I want to approve or reject requests that exceed an employee's accrued time so that authorized exceptions are controlled and traceable.

Source: FR-24, FR-26, FR-27; clarified approval rule

Acceptance criteria:

- Only an administrator with the appropriate departmental scope can act on the exception.
- The administrator can review the requested amount, available balance, and resulting balance before deciding.
- Approval records the administrator, decision, date, and resulting balance treatment.
- An approved negative balance carries or resets according to benefit-type policy.
- Rejection notifies the employee and returns the request to a final rejected status.

### ETR-022 — Adjust or deduct benefits

As a Benefits Administrator, I want to create authorized adjustments and deductions so that official balances can be corrected without losing history.

Source: FR-24

Acceptance criteria:

- Supported deductions include adjustments, paid-out time, accrual suspension, and maximum-reached events.
- The administrator must provide the required adjustment information.
- Previous values and the initiating administrator remain traceable.

### ETR-023 — Grant proxy access

As a Benefits Administrator, I want to grant proxy access so that an authorized delegate can manage requests for an eligible employee.

Source: FR-25

Acceptance criteria:

- Proxy access is limited to eligible employees and authorized delegates.
- Actions performed by a proxy identify the proxy as initiator or approver.
- The employee remains the subject of the request and balance transaction.

### ETR-024 — Maintain projects and holidays

As a Benefits Administrator, I want to maintain projects and location-appropriate company holidays so that visibility, routing, and request calculations reflect the organization.

Source: FR-28, FR-29

Acceptance criteria:

- Authorized administrators can view, create, edit, and delete projects within scope.
- Authorized administrators can maintain observed holidays by department or location.
- Holidays are excluded from applicable time-off deductions.
- Historical transactions remain understandable after configuration changes.

### ETR-025 — Generate summary reports

As a Benefits Administrator, I want to generate summary reports so that HR can monitor time-off activity and support operational decisions.

Source: FR-30; Reporting Requirements

Acceptance criteria:

- Reports can be generated by department, project, supervisor, or employee.
- Report data respects the administrator’s assigned scope.
- Results display in the application and can be formatted for printing.

SYSTEM STORIES

## SYS-001 — Recalculate balances consistently

As the product team, we need one rules-based calculation service so that dashboard balances, requests, approvals, withdrawals, accruals, and year-end processes remain consistent.

## SYS-002 — Preserve an auditable history

As the product team, we need changes and administrative actions to retain prior values and actors so that sensitive balance decisions remain traceable.

## SYS-003 — Apply role- and department-based authorization

As the product team, we need authorization enforced by role, department, reporting line, delegation, and proxy scope so that users see and change only permitted information.

## SYS-004 — Protect leave-category privacy

As the product team, we need team-availability views to suppress leave categories and request details so that schedule coordination does not expose private benefit information.