

Valuations Matrix - Scope

Original Matrix Requirements	Clarification & Notes on Original Requirements	New Requirements (beyond original scope)
Performance Issues		
Increase load performance and overall system speed. This task should have been completed by the end of 2003. It is still outstanding and is now URGENT!! (23)		
Specific functions that have already been identified as too slow include: 1. Create items – this button takes too long to refresh (max should be 2 seconds) 2. Update and next – as above 3. Delete and next – as above 4. Opening large valuations with complex location hierarchies (max ... seconds) 5. Building a location hierarchy – the problem here is not one of speed to refresh, but a complicated process		
Creating a Client		
Client and Client address		
Only Client name, date of death, address and CMS number is crucial for creating a new client page	Date of Death is not needed for UK. Adding Salutation to the list – agreed upon by both UK & NY.	
Create client and create address function should be amalgamated	Requirement has been met	
Salutation - long list is unnecessary, free text would be preferable	Add a text box for a salutation but also leave the current dropdown box. Also, clean the values in the dropdown, if possible.	
How will the Siebel link work? NB -We need control of the information being entered so that we can create valuations without waiting for a link to update, record to be created etc...		
Clarify the first/second address issues – at present this	NY & UK are ok with the current first/second	

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is confusing and not required at this stage. It would be preferable to link the addresses to print definitions [see point 5.6.i]	address functionality. Why is a label (Main, Alternate, Country, etc.) necessary? UK & NY always choose Main.	
		Currently, the client details are not overriding the client name in the affidavit (US only). UK & NY are requesting that in the Valuations Type screen, the Client Details text box is broken out into two separate text boxes: Client Name and Client Address. The client name will be linked to the name that appears on the affidavit. In the Print Wizard, clicking the new Override Client Details button will pop up two separate text boxes: Client Name and Client Address. - 3 days -
New Client Employee		
Delete – this appears to be an obsolete function. (E&A to confirm)	This has been met with Valuations 2.0 – client employee screen can remain as long as the typist is not forced to go to this screen.	
Valuation Details		
Sort out Valuation levels for Insurance, taxation etc (9)	This requirement has been met.	
Currency issues need to work!	Existing fields but need the functionality to allow multiple currencies to work. Allow amounts for 3 currency ranges (user will figure out the amounts and enter, does not have to be systematic).	If the system converts automatically – 1 week If the user manually enters values – 2 weeks
Fee details not required	UK and NY agree fee details can be removed unless Siebel needs it.	
Valuation date is crucial – and this should be a	Valuation date requirement has been met.	

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compulsory field.		
UK does not use these functions - US use only? - Contract date - Donee date - Valuation donation date - Source date - Blockage discount	NY does not need Contract Date or Source Date. NY researching if Blockage Discount is needed.	
Move the following to <i>Print Definition Wizard</i> [see point 5.7.b] <i>Special instructions</i> are not necessary at this stage <i>Panel page tick box</i> (currently not working) <i>Panel page Threshold box</i> <i>Coversheet page</i> <i>Valuation Client details page</i> - Add the ability to automatically print the correct Conditions of Business (valuer/ typist to define)	NY agrees that the Special Instructions, Coversheet Details, Client Details do not need to be in the Add Valuation wizard – however, they should be kept in the Valuation Type screen. UK ok with NY's comments. Looking into whether Special Instructions should be moved.	
<i>Specialist Dept</i> page is unnecessary – unless this is linked to security issues?	NY & UK agree that the Specialist Dept is unnecessary and can be removed as a required field unless it is an IT security issue.	
Some abbreviations are necessary????	UK to provide list of abbreviations.	
NB - Once this page has been completed, the typist should be taken directly to a combined Add Room/create location hierarchy page.		
		When typists import an appraisal, then search for them, the list will say "imported appraisal." This is helpful, letting us know that it was imported etc. but once you change the valuation level or type etc., that little note gets taken away, so we basically have no idea if it was imported or not. It'd be nice if we could still see that originally it was imported and now we've tweaked it.

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		- 2 days -
		Capture all typists who worked on a valuation, similar to how appraisers are captured. Currently, they must go to see who last updated the valuation, which is not always accurate, since 3-4 typists could have worked on one large valuation. - 2 weeks -
	When searching by valuation, add House to the search results returned.	
Add Room/Location Hierarchy		
Add Room/Location Hierarchy		
Combined add room with location hierarchy page.	Same as 2.3.h	
No need for default hierarchy – create/edit only? To be discussed.	NY would like to keep it. UK agrees to keep it.	
Building location hierarchies is a complicated and time-consuming process, but one that is essential to every valuation. We therefore feel it should be simplified.	Again, goes back to 2.3.h.	
Repeatedly reselecting the level, parent name etc not only takes time, but also leads to a greater risk of inaccuracies.	Requirement being met with Valuations 2.1. Would like the location level (house, room, floor) to default to what was last chosen.	

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The layout of the lower screen needs to be discussed and redesigned – it is currently difficult to see and manoeuvre around.	Rearrange the screen in the following order: • House level (as currently at top) • Level • Name • Update Name • Parent Name • Add, Delete & Update buttons • Hierarchy fields (move to bottom) Why is address necessary when adding a house, since the address never prints out anywhere? Only house name is necessary.	
Cursor keys tabbing is very useful	NY and UK are ok with current tabbing order.	
	Currently, unable to delete a house with sub-locations, the user has to delete each sub-location at a time. Would like to be able to delete by house, a warning message would be fine. Requirement being met with Valuations 2.1.	
	Make fields longer – House name and Names of locations get cut off. Requirement being met with Valuations 2.1.	
Add Items screen		- 3 weeks - (for all Add Items changes)
Location Hierarchy		
Location hierarchy drop down menu should be in the order it was added (ie as per the room list) rather than alphabetically	NY & UK agree to keep alphabetical rather than change to order it was added.	
Artists box needs to be improved (2):		
Clean-up of data - this may prove to be a user-based project, however IT need to give input and assist by guiding users. Is it possible to link previous incorrectly inputted artist details to an agreed correct artist name? (2)	When artists were first imported, it seems they were imported with the first and last initials as middle initials – this should be cleaned up (e.g. Pablo PP Picasso).	

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Discuss the links to artists index database and how this should be used. [Maybe introduce a free text field and an artist index box??]		
We must be able to determine what goes in	Further discussion needed.	
We require 'type in' facility in the artists pick lists as well as being able to scroll down the list of artists using cursors, which at present is not possible	While progressive typing, would like to search by full name – type in: Boyd, L and then it would search for Boyd, Laura – instead of only by Last name and only by First name. Update: This is a bug to be fixed.	
Has (6) been resolved? (reformatted text pasted from external sources). Currently, typists have to cut and paste text from Word to Notepad, then cut and paste from Notepad to the system.	Is it possible to skip Notepad and keep the formatting of the cut text?	
Font size overall too small (3). This problem may be remedied with large monitors.	NY & UK think font size is fine. OK now that the monitors are larger.	
Size box – box size has been increased (3) but font size has not (4). Make font size in Size box the same as the font size in the Description box.	Widen Size box.	
	Make all fonts on the screen the same size – size of Description font.	
Remove <i>sub-items</i> tabs – these are never used.	NY needs the sub-items tabs – leave them as is.	
<i>Comparable/Qualifying</i> info prints out in the wrong order. [report issue 5.6.i]	This requirement has been met.	
<i>Code boxes</i> need to be simplified and redesigned so that it is easier to use and accurate.	Has been added with Reports Module project.	
<i>Owner code box</i> - It should be possible to print off a report by owner codes, then house etc [report issue 5.4a] <i>Salutation, first name, middle initial, last name, suffix, decoration</i> = unnecessary info and rarely filled in.	UK – Reports Module	

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Only owner code and text is required for the key.		
<i>Tax code box</i> – this seems to be an area of confusion, which is currently not correctly used. As there seem to be a small number of actual tax codes, we are in discussion with the Heritage & Taxation Dept to establish a full list of standard codes used and any variable information (usually id references) which should be linked to the tax codes, in order to work out the best way to simplify this and make it more efficient. - Tax code, key text, print order seem ok but the link to the key does not work [see below] - Linking the tax code to the CTO box is currently rarely used but should be retained. Possibly link the <i>CTO number</i> to the redesigned tax code box, rather than as a separate box? This needs to be discussed further. - However, often there is more than one tax code reference, but at present there is only the CTO box, which is not being used properly (due to lack of user awareness) - it should be possible to add more references linked to the item, rather than adding them as a separate tax code, which is what currently happens – this would prevent the long lists of irrelevant information in this box which takes time to scroll through and makes the key inaccurate. A further free text field for these and other reference (i.e. for codes other than owner, inventory number, or tax codes) would be useful.	UK – Reports Module If you ask it to print a summary of exemption, if the E has a number by it, it will not be recognised as an exempted item on the summary by exemption page [see point 5.6.f]	
Key must work properly [print report 5.8]	UK – Reports Module	
Need to be able to suppress the tax codes in print	UK – Reports Module	

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definition wizard [print report 5.2.b]		
<i>From photo</i> box – can this generate a caveat on the Print wizard [print report 5.7d] ‘Valued from Photographs	This requirement has been met.	
<i>NSV value box</i> - Why is the separate, can it not be free text?		The values chosen in this field are not consistent with what gets printed on the report. Add free text box, when it is populated, it will appear beside or beneath the value.
	When choose Purchase Price, ‘Purchase Price’ gets printed on the report without the price – would like both to appear when printed. Update: Bug to be fixed.	
	<i>Special characters</i> box as a drop down is unwieldy and time-consuming. It also does not cater for imperial measurements well, particularly fractions (we require eighths of an inch). UK & NY prefer to enhance the shortcuts for special characters and allow them to be printed out – possibly store them under Table Maintenance. Update: UK prefers to keep special characters as they are today.	Add 1/8, 3/8, 5/8, 7/8 to the special characters box for UK.
Redesign layout for ease of inputting relevant information: NB - Consult typists/valuers to establish order of dictation for tabbing purposes.	UK & NY to give prototype of screen layout changes.	
Estimates boxes need to be higher up or use a hot key	Layout issue	

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to tab to it.		
Owner code and tax codes should to be next to inventory number box	UK only	
Quantity box needs to be next to inv. no.??????	UK thinks it should be moved in front of the Provenance box. NY ok with this.	
Move images down to the end of the page	NY agrees.	
Create hot keys (7) to enable typist to go to: Price box and Quantity box	Quantity hotkey is being implemented with Valuations 2.0. Hotkey exists for Price.	
The list of hot-keys can be removed from this screen - the typist should have a hard copy for reference. (Possibly display these as a table in <i>Table Maintenance</i> page? [point 9.1])	NY thinks there could be a link or text where when the mouse rolls over it, a complete list of hotkeys will appear.	
	List of hotkeys in Table Maintenance – list is printable.	
	<i>Next/Previous buttons</i> –Not only do these buttons not work, they also (if accidentally hit b/c of hot keys) throw you out of the screen Currently, if nothing is populated in the val object number field, and the typist clicks on the previous or next button, random things happen, like kicking the user out of the window.	Add the words 'Go to' in front of Val object number.
	In the informational section that displays the typist and date the item was entered/updated, display the val object number of the current item.	
	Allow for formatting in the Size box – bold, italics and underline.	
	Make size box wider.	
	New fields include: • Group Text field • Miscellaneous Numbers field	

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	Quantity Text field	
	Reports Module project	
	Inventory Number field will be longer (in height) to allow for a listing of numbers as they will appear on the report.	
		For sub-items, allow a way to insert 'and' between the items on the report – and the inventory numbers will line up with the items. Make this an option.
Mass Changes		
Suggest adding facility to take items valued by this valuer and assign to this category (Value/valuer/cat/tax codes)	Allow a filter so that all items for a particular valuer can be changed to a different category. Requirement being met with Valuations 2.1.	
Assign values by room?	This requirement can be removed.	
	Mass delete – the layout would look similar to the Change Location screen – the capability to search by location or category and then checking off or selecting the items to be deleted en masse. Requirement being met with Valuations 2.1.	
	Add the ability to delete a house with sub-locations rather than having to delete level by level. Have a warning pop up that the house will be deleted. Requirement being met with Valuations 2.1.	
	Add owner code for updatable field in Mass Changes functionality. Requirement being met with Valuations 2.1.	
	When changing the valuer, it currently shows ALL valuers when changing from - please fix to show only the valuers in the valuation.	

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	Requirement being met with Valuations 2.1.	
	Implement a way to mass change categories - say 200 out of 2000 items. A way to filter then change the categories returned - the way Change Location Hierarchy (filter) works today.	
	Requirement being met with Valuations 2.1.	
	In the Mass Changes filter screen, add the ability to search by val object number.	
	This requirement can be removed.	
	Display the val object number in the filter results.	
	This requirement can be removed.	
Change Location		
Why are the rooms listed alphabetically? It would be easier to make changes if it was done by room order.	Update: Would like a dropdown of different houses, and when choose House 1, only rooms for that house will be listed (like Loc Hier in Add Items)..	
	Requirement being met with Valuations 2.1.	
Can we presume that point (12) (provide the ability to move specific categories en mass into other rooms rather than by selecting each item) will be dealt with in the changes to copy/move, new from existing.	Nicole feels using the move from existing functionality for this is overly complicated for the same valuation, it would help immensely to add a dropdown that allows to filter by category in the Change Location screen.	
	Requirement being met with Valuations 2.1.	
	Font needs to be larger, larger boxes too.	
	Requirement being met with Valuations 2.1.	
	When hitting Enter in this screen, the Search button should be activated as it is in the other screens.	
	Requirement being met with Valuations 2.1.	

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	Inventory #s and perhaps even Obj Val #s should be added to this screen to the list returned. It would help pinpoint items when selecting to move them.	
Search/Modify Items in Valuation, by Location		
Can the search Valuation list be remembered (options lists of previous vals worked on)	Shift + valuation will open a new window for the valuation. This requirement can be removed.	
Search by room and inventory number – add search capabilities to eliminate multiple screen use needs (5) (Items by location – can these be put all on one page not just 20 at a time?)	This requirement has been met.	
Unique identifying valuation number facility does not currently work fully – cannot scroll through them as designed.	This requirement has been met.	
If you select items by <i>val object number</i> , go into them and then update and next, it doesn't necessarily go to the next val object number – please can this be fixed (8). Partially resolved, but glitch exists which as detailed above.	This requirement has been met.	
	Allow a search item to be run by taxation code.	
<i>Update & next</i> often goes back to the previous item on the print-out rather than the next one.	This requirement has been met.	
		The capability to move “CURRENT LEVEL” after various rooms and having the categories without rooms print first or last within the appraisal – currently if Fine Art has no floor/room it is printed out first by default. Sometimes an appraisal will call for the Fine Art to be printed last after all the items with Floors/Rooms – of course there is no way to do this unless the Fine Art is given a floor/room

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		and then rearranged in Search by Location. Whichever items without a room in the current level are pushed to the beginning – allow the current level to be placed where the typist wants it. - Add to Reports Module requirements -
	Please add a field that won't print out – to be used only for the typists for special notes... Sometimes this is useful to distinguish multiple Selection for Sales – so when doing a search for a Client, the name, CMS, type of appraisal, number of items etc will come up and instead of the TITLE of the appraisal or the RESERVE being one of the columns, replace it with a special notes column – this column can also be seen or perhaps linked to Print Definition Wizard. Typist notes requirement being met with Valuations 2.1. Reserve field can be deleted – agreed upon by both NY & UK.	
		In Search results screen, whenever an appraisal is first created or imported, have the Status field default to New From Existing, Created or Imported. A table will be created, allowing the users to add status values under Table Maintenance. It will be the responsibility of the typist to update the status after the initial creation of the appraisal. *UK ONLY*

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		- 2 days -
		In the Search results, Reserve field can be removed. Display Val ID number. Return search results by name, CMS ID in ascending order (oldest to newest). In Search By section, add Val ID number as new search criteria. In Search by Items screen, when choose filter parameters and hit the Enter key, it should perform a search (currently, must hit the Search key). In Search by Location screen, if you are rearranging items and you decide to use the "Take Items from" tool at the top or bottom of the screen, that little dropdown menu that currently only says "After" should also include a "Before" option. That would be nice for when we are trying to move items <i>before</i> the first item.
		- 1 week -
Table Maintenance		
Add the list of hot keys to table maintenance for reference (typist should have a hard copy as well) [See point 4.12.f]	List of hotkeys should be printable. This also goes into superuser access requirements.	
		Super User Access will be given to select users for fields to be determined.
		- 1 week -
	Clean-up of the data under Table Maintenance will need to be performed.	
	Determine Siebel links for the data under Table Maintenance.	
Siebel Issues		

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Will information be pulled from Siebel? (i.e. MCC, PRI 1, etc)	Yes – info in Valuations will be locked; when the corresponding info in Siebel is updated, it does not change in Valuations.	
New Security level for Specialists – will allow designated business users in sale departments to access Valuations. Dependent on Siebel requirements (19)		
Implement Client Info Screen in UI (Using BizTalk) – will allow direct client update in Siebel from Valuations. Copies CatSubs Client Info Module, and should be close to plug-in depending on Valuations Data Model (20)		
Record Merge Utility – Required for client record consolidation and synchronization between Siebel and Valuations (21)		
Siebel Views, Phase 1 - Will allow Siebel users to view Valuations data in a tab in Siebel. This is only the work required for Valuations development. (25)		
Siebel View, Phase 2 – Create a valuation record from Siebel. Includes using BizTalk for communication between Siebel and Valuations for this purpose (26)		
Siebel Views, Phase 3 - Creation of abbreviated inventory functionality in Valuations to track client inventory. "Valuations Lite". (27)		
		Copy/Move/New From Existing Functionality
	Bring over all print definitions in a new from existing appraisal. Requirement being met with Valuations 2.1.	
		In the copy/move function, users have to select a hierarchy. But if it doesn't exist you have to go to the appraisal and create it. Add a button that would bring up the location hierarchy screen of that appraisal so that you can add

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		those locations immediately instead of having to go through various screens and then come back to the copy/move function. When in an appraisal, it automatically takes the appraisal typist is in and makes that the source appraisal. It is most likely the appraisal typist is in is the appraisal you will be adding to and therefore should be defaulted as the destination appraisal. - 1 week -