

eTrack System

employee timesheet & expense tracking software

Use Cases

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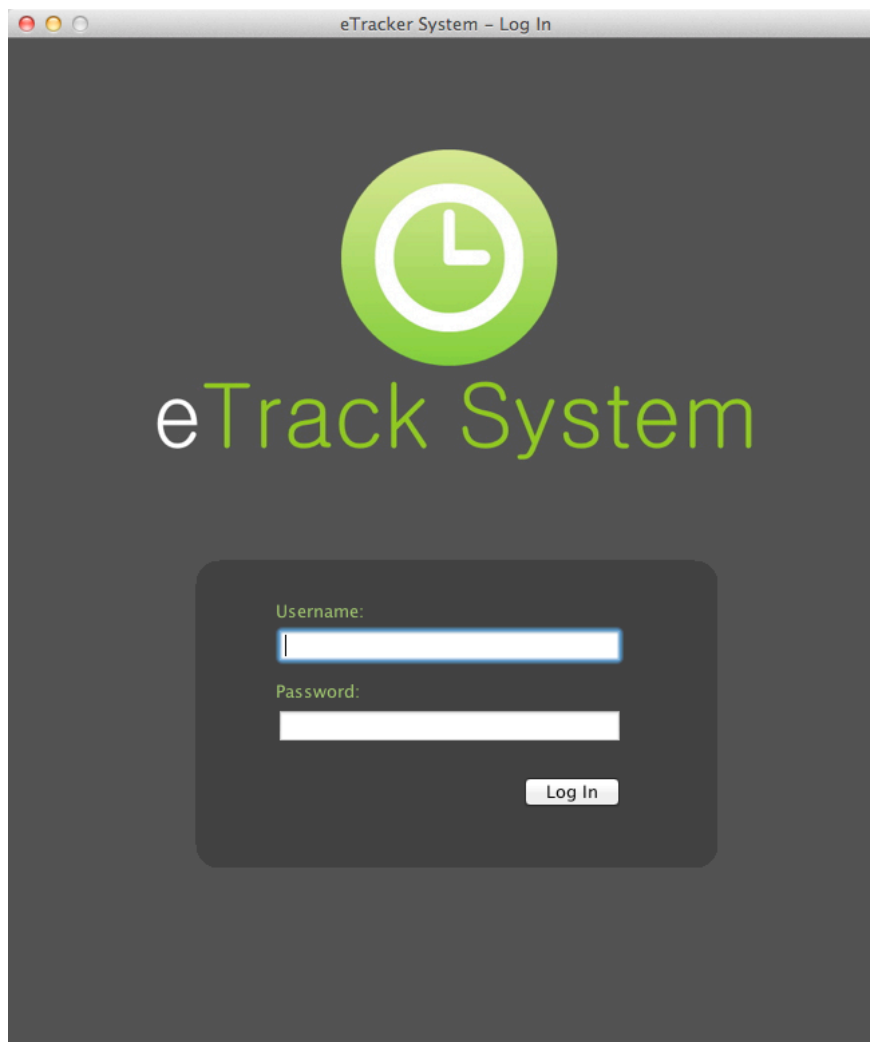
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1 Administrative Users – Common Operations

This section is intended to give administrative users detailed step-by-step instructions for how to use the most popular functions of the e-Tracking System.

1.1 Updating a consultant's personal information

- 1) Log into the eTrack system using your designated username and password.



- 2) In the Select Employees screen, select the employee you wish to edit. You can use the Current or Past filters to narrow down the possibilities.

[Employees](#) [Timecards](#) [Projects](#) [Expenses](#) [Clients](#)

Select Employee

Employee Details

Contact Information

Projects

Quotas

Expenses

Add New Employee

Select Employee:

☐ Current

☐ Past

☐ All

Name	Remaining Vacation Days
Scott Durham	12
Lee Wolitz	20
Alexandra Weisel	16
Michael Lewallen	21
Halle Feuerman	22
Karen Cohen	15
Richard Reichert	18
Josh Schindler	20
Andrew Wattenberg	17
Amanda McNally	17
Grace Lee	19
Eddie Saqan	22

Submit

Log Out

- 3) Select the desired employee and click Submit.

Submit

- 4) On the resulting screen, change the consultant's address to the following:
- Address 1: 1 N. Charles Street
 - City: Baltimore
 - State: MD
 - ZIP: 21231

Before change:

Employees Timecards Projects Expenses Clients

Select Employee
Employee Details
Contact Information
Projects
Quotas
Expenses
Add New Employee

Name: Alexandra Page Weisel

Address: 6 W. University Parkway

City: Baltimore

State: MD

Zip: 21218

Social security number: 147258369

Date of birth: May 6, 1979

32

Full-Time Consultant

Start date: Aug 20, 2005

End date:

Reset Save

Log Out

After change:

Employees Timecards Projects Expenses Clients

Select Employee
Employee Details
Contact Information
Projects
Quotas
Expenses
Add New Employee

Name: Alexandra Page Weisel

Address: 1 N. Charles Street

City: Baltimore

State: MD

Zip: 21231

Social security number: 147258369

Date of birth: May 6, 1979

Age: 32

Status: Full Time Consultant

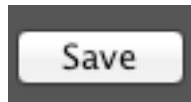
Start date: Aug 20, 2005

End date:

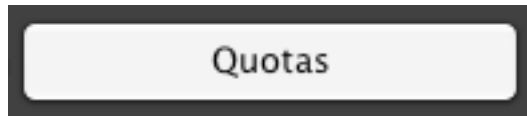
Reset Save

Log Out

5) Click Save.

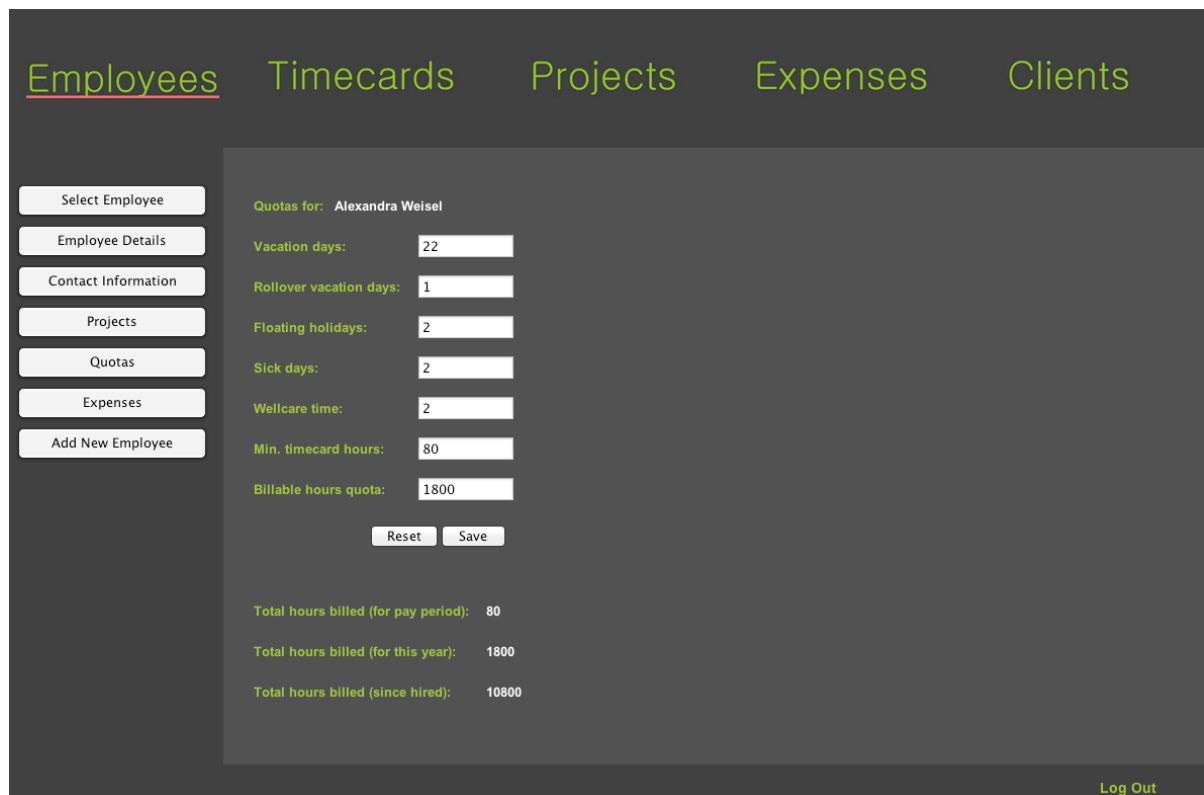


6) Select the Quotas button from the left hand navigation



7) Change the user's rollover vacation days to 0

Before change:



The screenshot shows a web application interface with a dark gray background. At the top, there are five tabs: "Employees" (underlined in green), "Timecards", "Projects", "Expenses", and "Clients". On the left side, there is a vertical navigation menu with buttons: "Select Employee", "Employee Details", "Contact Information", "Projects", "Quotas" (highlighted), "Expenses", and "Add New Employee". The main content area displays the "Quotas for: Alexandra Weisel" section. It contains several input fields with labels in green: "Vacation days:" (22), "Rollover vacation days:" (1), "Floating holidays:" (2), "Sick days:" (2), "Wellcare time:" (2), "Min. timecard hours:" (80), and "Billable hours quota:" (1800). Below these fields are "Reset" and "Save" buttons. At the bottom of the main content area, there are three summary lines: "Total hours billed (for pay period): 80", "Total hours billed (for this year): 1800", and "Total hours billed (since hired): 10800". In the bottom right corner of the page, there is a "Log Out" link.

Field	Value
Vacation days	22
Rollover vacation days	1
Floating holidays	2
Sick days	2
Wellcare time	2
Min. timecard hours	80
Billable hours quota	1800

Summary	Value
Total hours billed (for pay period)	80
Total hours billed (for this year)	1800
Total hours billed (since hired)	10800

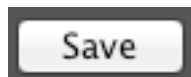
After change:

The screenshot shows a web application interface with a dark grey background. At the top, there are five navigation tabs: Employees, Timecards, Projects, Expenses, and Clients. On the left side, there is a vertical menu with buttons: Select Employee, Employee Details, Contact Information, Projects, Quotas (highlighted), Expenses, and Add New Employee. The main content area displays the 'Quotas for: Alexandra Wiesel' form. It contains several input fields with labels and values: Vacation days: 22, Rollover vacation days: 0, Floating holidays: 2, Sick days: 2, Wellcare time: 2, Min. timecard hours: 80, and Billable hours quota: 1800. Below these fields are 'Reset' and 'Save' buttons. At the bottom of the form, there is a summary section with three lines: Total hours billed (for pay period): 80, Total hours billed (for this year): 1800, and Total hours billed (since hired): 10800. In the bottom right corner of the application, there is a 'Log Out' link.

Label	Value
Vacation days:	22
Rollover vacation days:	0
Floating holidays:	2
Sick days:	2
Wellcare time:	2
Min. timecard hours:	80
Billable hours quota:	1800

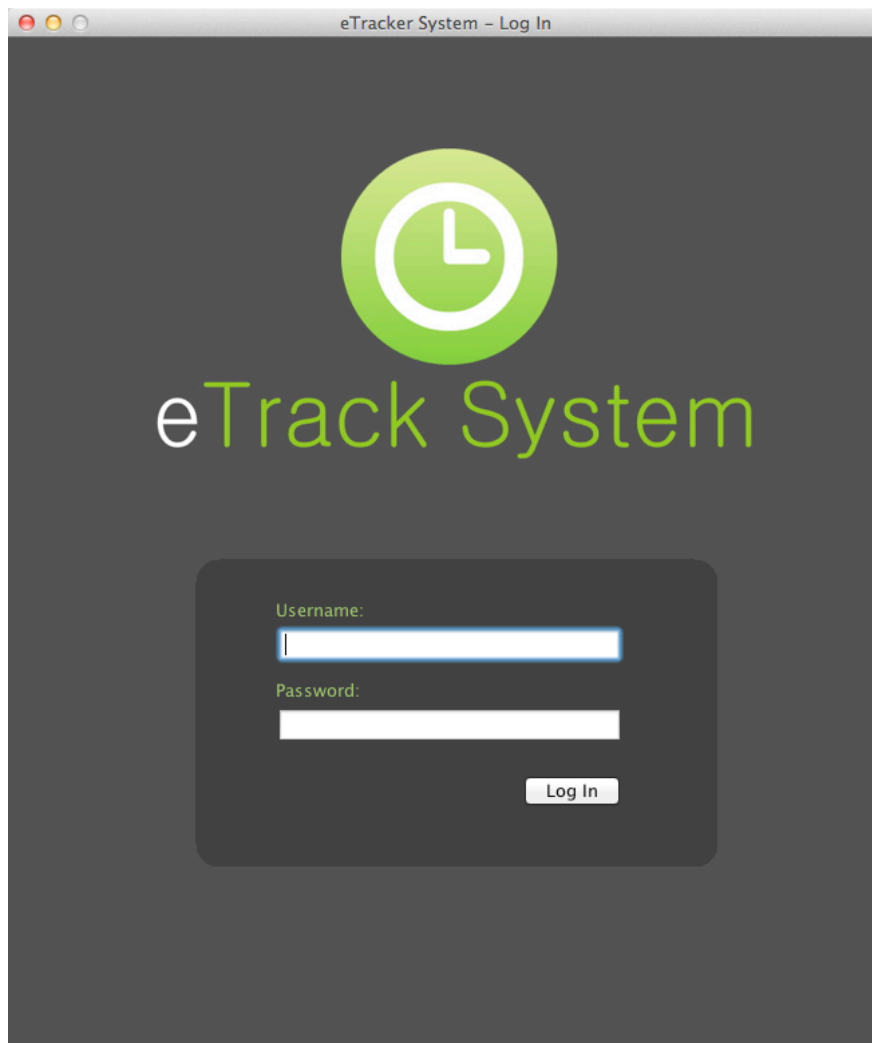
Label	Value
Total hours billed (for pay period):	80
Total hours billed (for this year):	1800
Total hours billed (since hired):	10800

- 8) After verifying the accuracy of the user's information, click the Save button to save changes.



1.2 Adding a Project

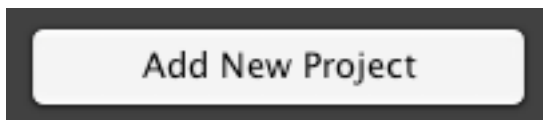
- 1) Log into the eTrack system using your designated username and password.



- 2) Click on the Projects button at the top of the screen



- 3) Click on the Add New Project button at the left side of the screen



- 4) Enter in a Project with the following information:

- a. Project description: Ecommerce Implementation
- b. QuickBooks ID: Ecommerce
- c. Client: Comcast
- d. Start Date: Today's Date
- e. Requires Comment: False
- f. Is Billable: True

Before changes:

Employees Timecards Projects Expenses Clients

Select Project
Project Information
Consultants
Add New Project

Project description:

QuickBooks id:

Client:

Start date:

Requires comment?: ☐ Yes ☐ No

Is billable?: ☐ Yes ☐ No

Add consultants:

Name

Save

Log Out

After changes:

Employees Timecards Projects Expenses Clients

Select Project
Project Information
Consultants
Add New Project

Project description: Ecommerce Implementation

QuickBooks id: Ecommerce

Client: Comcast

Start date: Dec 4, 2011

Requires comment?: ☐ Yes ☒ No

Is billable?: ☒ Yes ☐ No

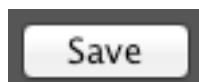
Add consultants

Name

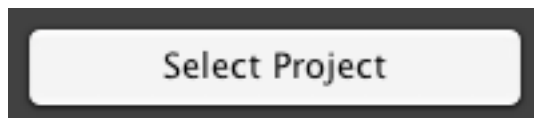
Save

Log Out

5) Click Save



6) Click on Select Project on the left hand side



7) Verify that the Project is now available in the Projects table.

The screenshot displays a web application interface for managing projects. At the top, there is a navigation bar with links for Employees, Timecards, Projects, Expenses, and Clients. The 'Projects' link is highlighted with a red underline. On the left side, there is a sidebar with buttons for 'Select Project', 'Project Information', 'Consultants', and 'Add New Project'. The 'Select Project' button is active. The main content area shows a 'Show only:' dropdown menu set to 'Billable Projects'. Below this, there is a 'Select project:' section with three radio buttons: 'Current', 'Past', and 'All'. The 'All' radio button is selected. To the right of the radio buttons is a list of project descriptions. At the bottom right of the list is a 'Submit' button. In the bottom right corner of the page, there is a 'Log Out' link.

Employees Timecards Projects Expenses Clients

Select Project

Project Information

Consultants

Add New Project

Show only: Billable Projects

Select project:

- ☐ Current
- ☐ Past
- ☒ All

Project Description

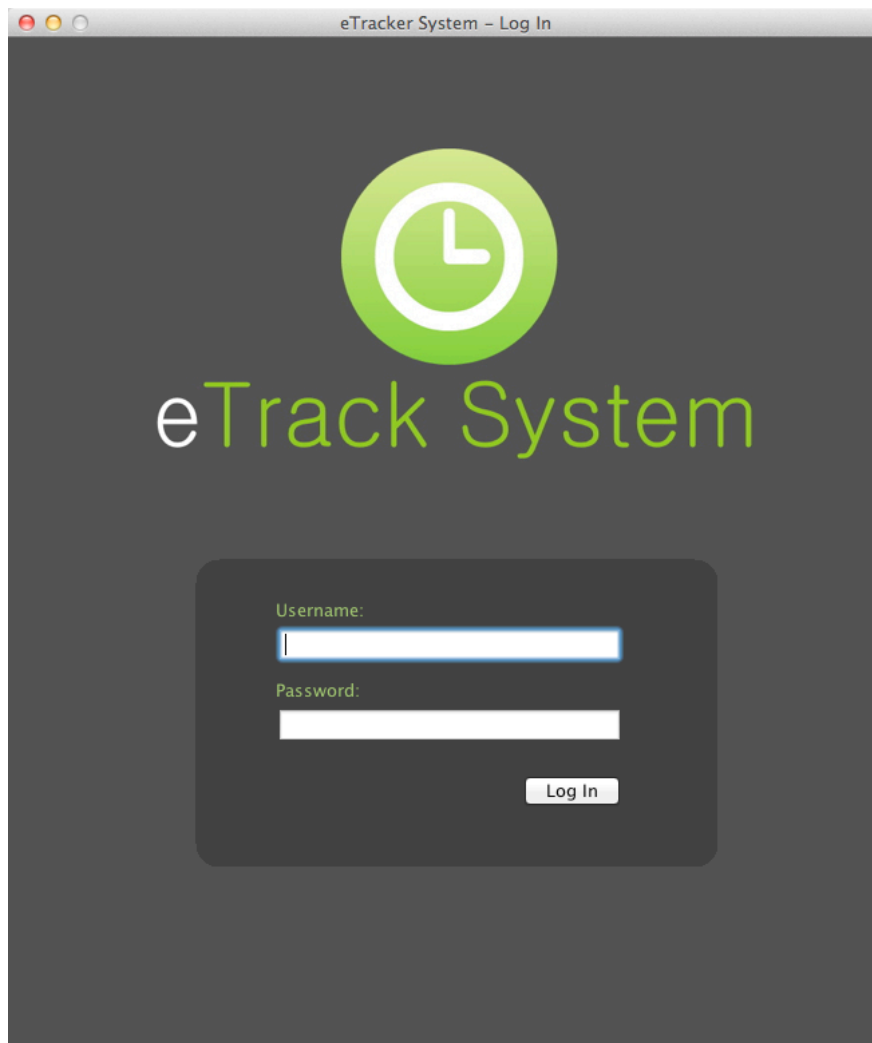
- Ecommerce Implementation
- Development of a New database for IBC
- Website Implementation for IBC
- Website Update for OF
- Database Design for Comcast
- Database Implementation For SFI
- Software Project Management For AI
- Software Project Management For BOA
- Database Design and Implementation for CIGNA
- Software Design for ZMG
- Website Design for Aetna
- IT Consulting for UHG

Submit

Log Out

1.3 Adding Consultants to a Project

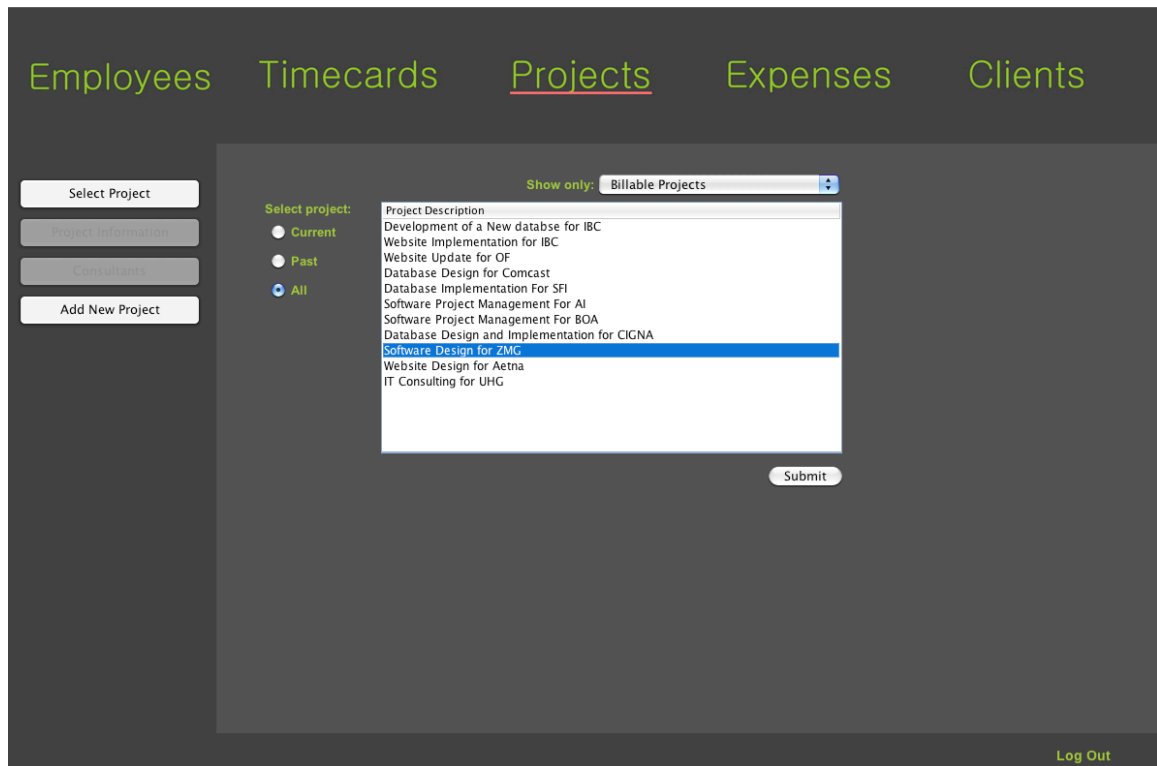
- 1) Log into the eTrack system using your designated username and password.



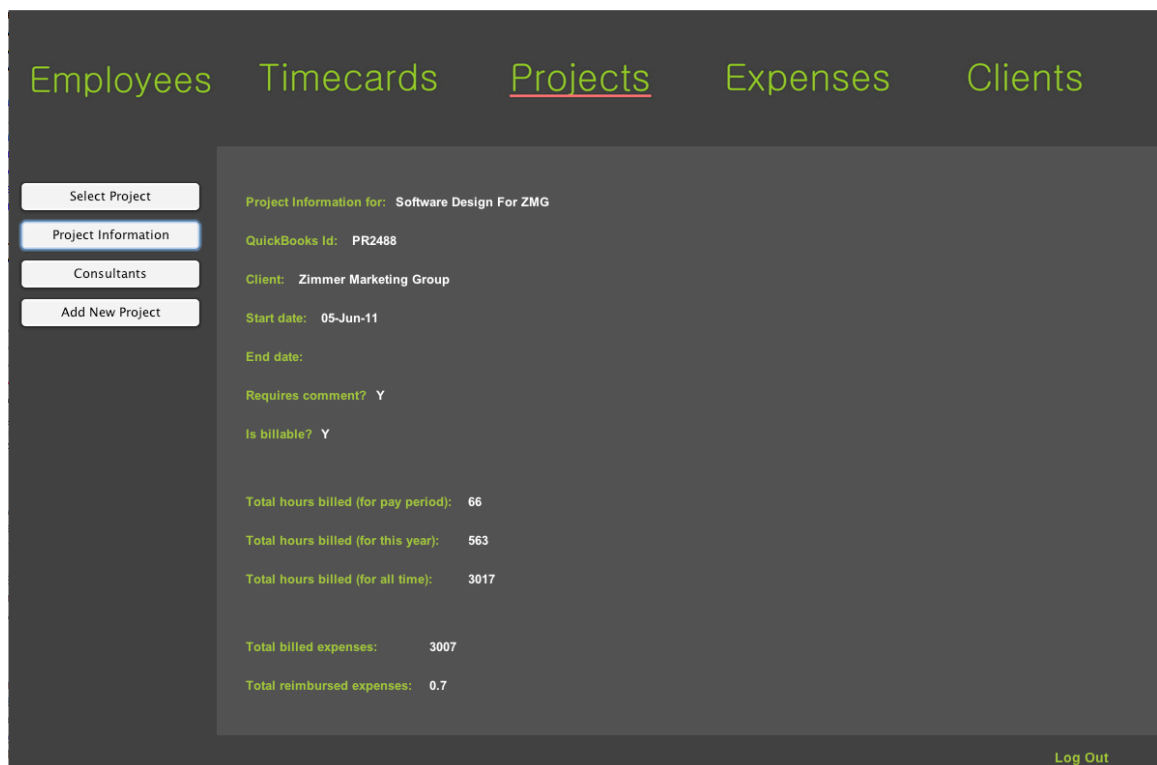
- 2) Select the Projects button at the top of the screen.



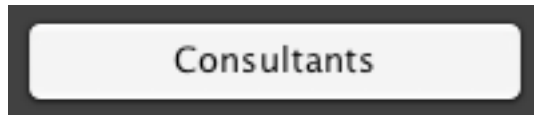
- 3) In the Project table, select any project and click Submit.



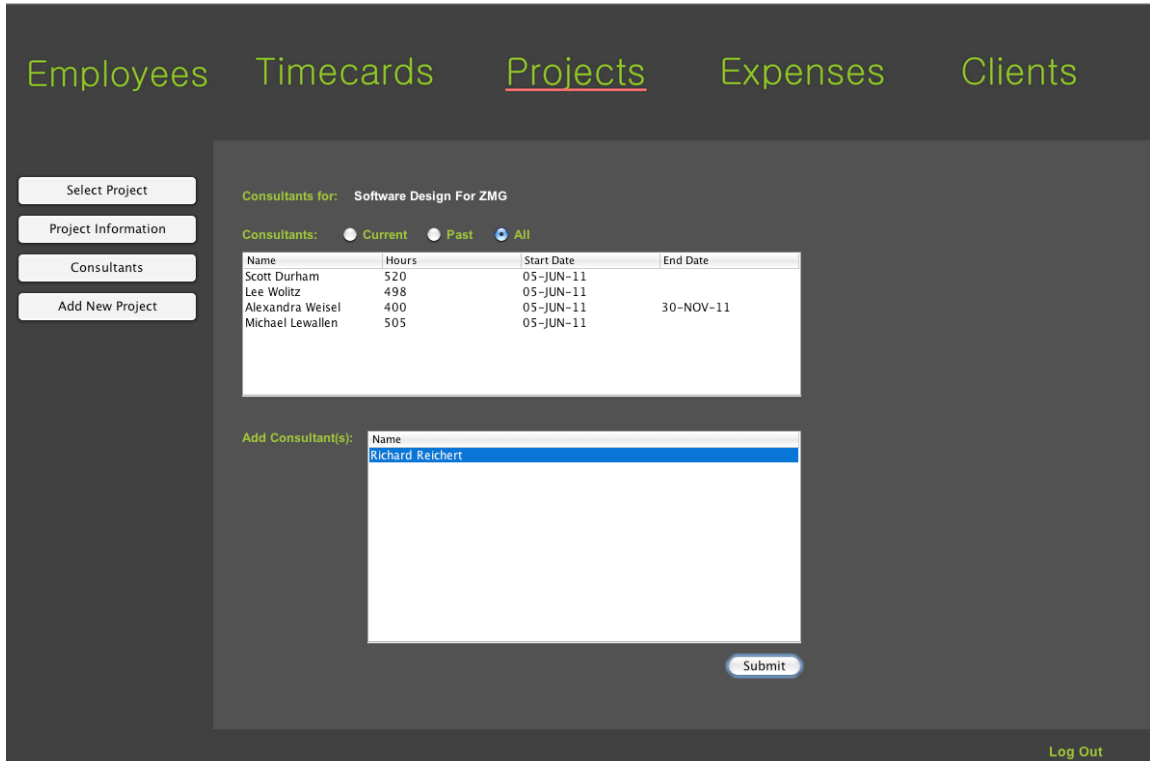
- 4) On the resulting Project Information screen, verify that the loaded project is the project which was selected.



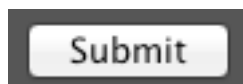
- 5) Click on the Consultants button.



- 6) In the Add Consultants control, select a consultant.

A screenshot of a web application interface. At the top, there is a navigation bar with five tabs: "Employees", "Timecards", "Projects" (which is underlined and highlighted in green), "Expenses", and "Clients". On the left side, there is a vertical sidebar with four buttons: "Select Project", "Project Information", "Consultants" (which is highlighted), and "Add New Project". The main content area has a dark gray background. At the top of this area, it says "Consultants for: Software Design For ZMG". Below this, there are three radio buttons: "Current", "Past", and "All" (which is selected). Below the radio buttons is a table with four columns: "Name", "Hours", "Start Date", and "End Date". The table contains four rows of data. Below the table, there is a section labeled "Add Consultant(s):" followed by a text input field containing the name "Richard Reichert". At the bottom right of the main content area, there is a "Submit" button. In the bottom right corner of the entire page, there is a "Log Out" link.

- 7) Click Submit.



- 8) Verify that the Consultant was added to the Consultants table above as an active consultant.

EmployeesTimecardsProjectsExpensesClients

Select ProjectProject InformationConsultantsAdd New Project

Consultants for: Software Design For ZMG

Consultants: ☐ Current ☐ Past ☒ All

Name	Hours	Start Date	End Date
Richard Reichert	0	03-DEC-11	
Scott Durham	520	05-JUN-11	
Lee Wolitz	498	05-JUN-11	
Alexandra Weisel	400	05-JUN-11	30-NOV-11
Michael Lewallen	505	05-JUN-11	
Richard Reichert	0	03-DEC-11	

Add Consultant(s):

Name

Submit

Log Out

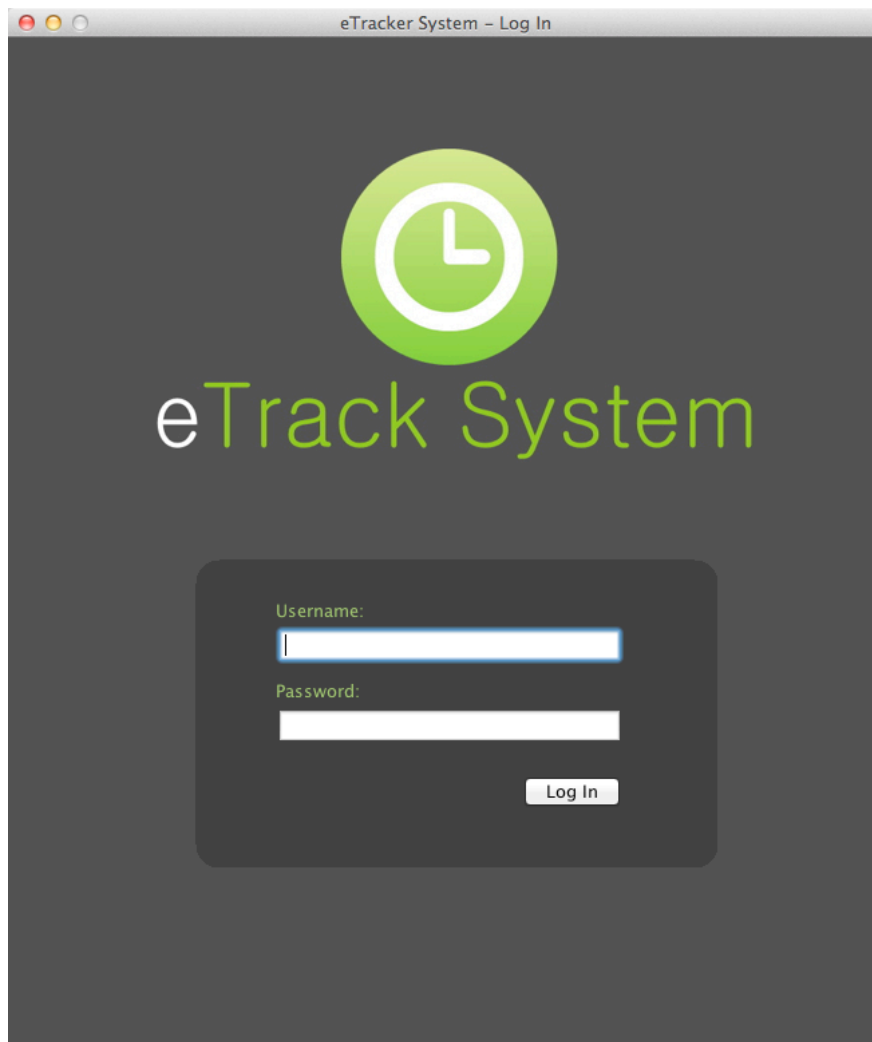
2 Consultant Users – Common Operations

This section is intended to give consultant users detailed step-by-step instructions for how to use the most popular functions of the e-Tracking System.

2.1 Timecards

2.1.1 Log Activity

- 1) Log into the eTrack system using your designated username and password.



- 2) Decide on an activity that you would like to log in your timecard.

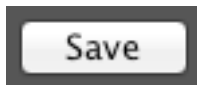
- 3) Find the first available empty row. If no additional project rows are available, add a new row by clicking the + icon.



- 4) Select the desired project from the drop down list. If the project to which you must log time is a Client Project and the Client Project is not available in the drop down list, contact an administrator.

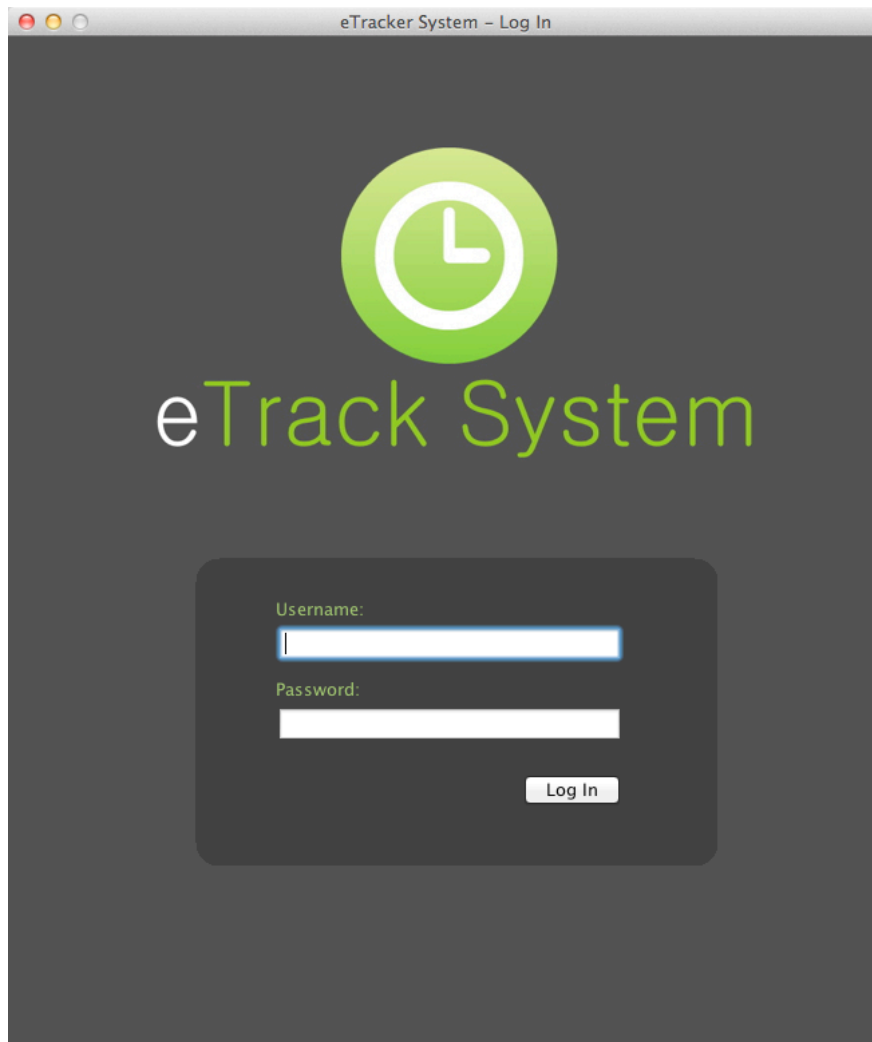


- 5) Click in the text box beneath the date on which the activity occurred.
- 6) Enter in the length in hours of the activity. Half-hour increments are permitted.
- 7) Save the timesheet by clicking the Save button at the bottom right.



2.1.2 Remove activity

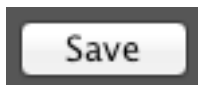
- 1) Log into the eTrack system using your designated username and password.



- 2) Click the – icon that is adjacent to the project that is to be deleted.



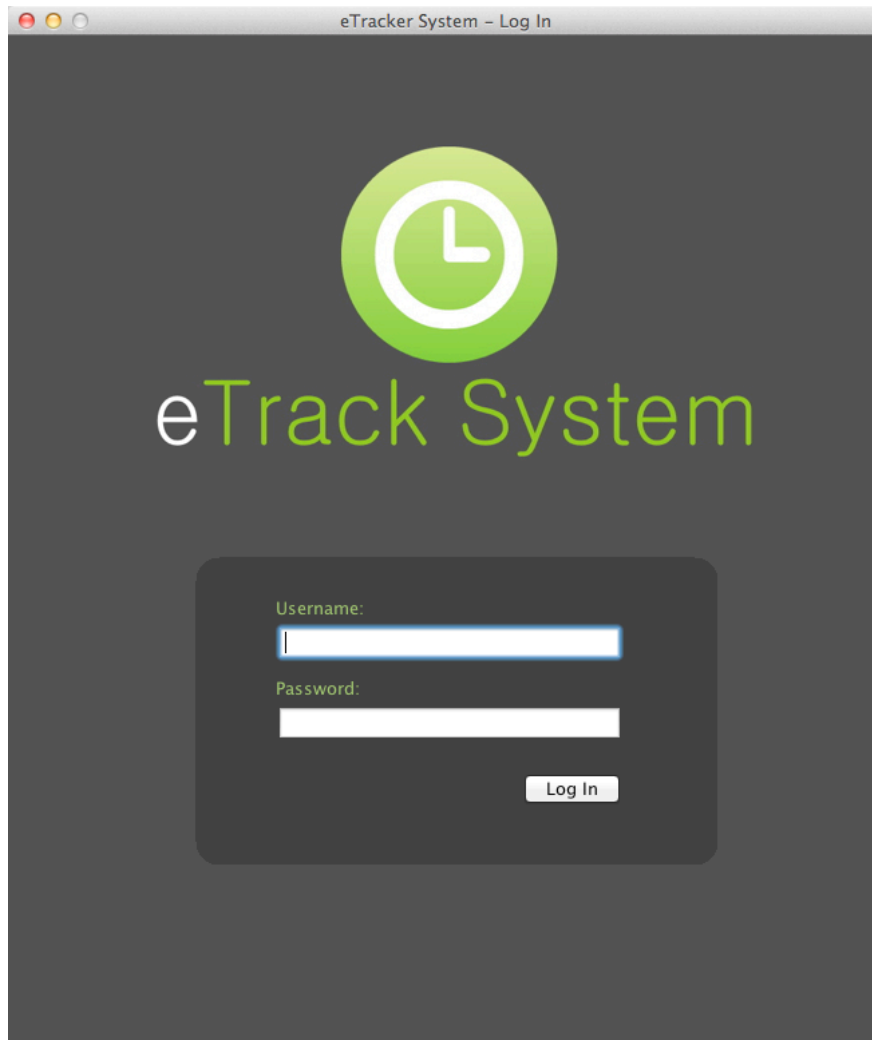
- 3) After verifying that the project has been removed, save the timesheet using the Save button at the bottom right.



2.2 Expenses

2.2.1 Log Expense

- 1) Log into the eTrack system using your designated username and password.



- 2) Click on the Expenses button at the top of the screen.



- 3) Find the first available empty row. If no rows are empty, one can be added via the + icon.



- 4) Under the Date heading, enter in the date the expense occurred.
- 5) Under the Amount heading, enter in the dollar amount of the expense (e.g. 39.99).
- 6) Under the Vendor heading, enter in a description of the vendor. For example, for your O'Reilly Books Online subscription, enter "O'Reilly Media."

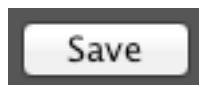
- 7) Under Description, briefly describe the nature of the expense. Reusing the previous example, you would write something along the lines of “Online Library Access.”
- 8) Within the Project drop down list, choose the project associated with the expense. If the project to which you must log the expense is a Client Project and the Client Project is not available in the drop down list, contact an administrator.
- 9) Within the Category drop down list, choose the category associated with this expense.
- 10) Choose one of the two billing options, “Bill Client” or “Reimburse.”
- 11) Verify all information.

The screenshot shows the 'Expenses' tab in the eTrack system. The form is for logging an expense. The fields are as follows:

Date	Amount	Vendor	Description	Project	Category	Bill Client	Reimburse
Dec 5, 2011	39.99	O'Reilly Media	Online Library Access	PR941	Office Supplies	<input type="radio"/>	<input type="radio"/>

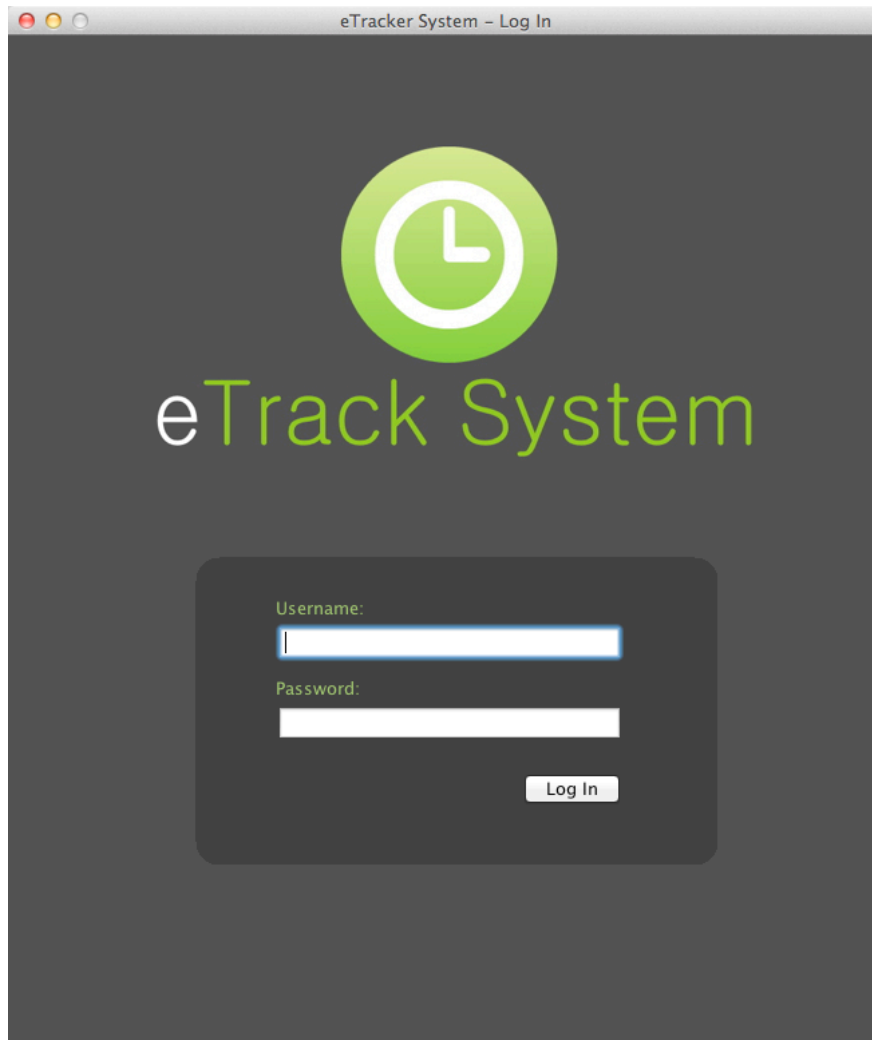
At the bottom right, there are buttons for 'Save' and 'Submit', and a 'Logout' link.

- 12) Click the Save button at the bottom right.



2.2.2 Remove Logged Expense

- 1) Log into the eTrack system using your designated username and password.



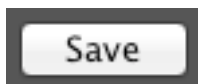
- 2) Click on the Expenses button at the top of the screen.



- 3) Click the – icon that is adjacent to the expense that is to be deleted.



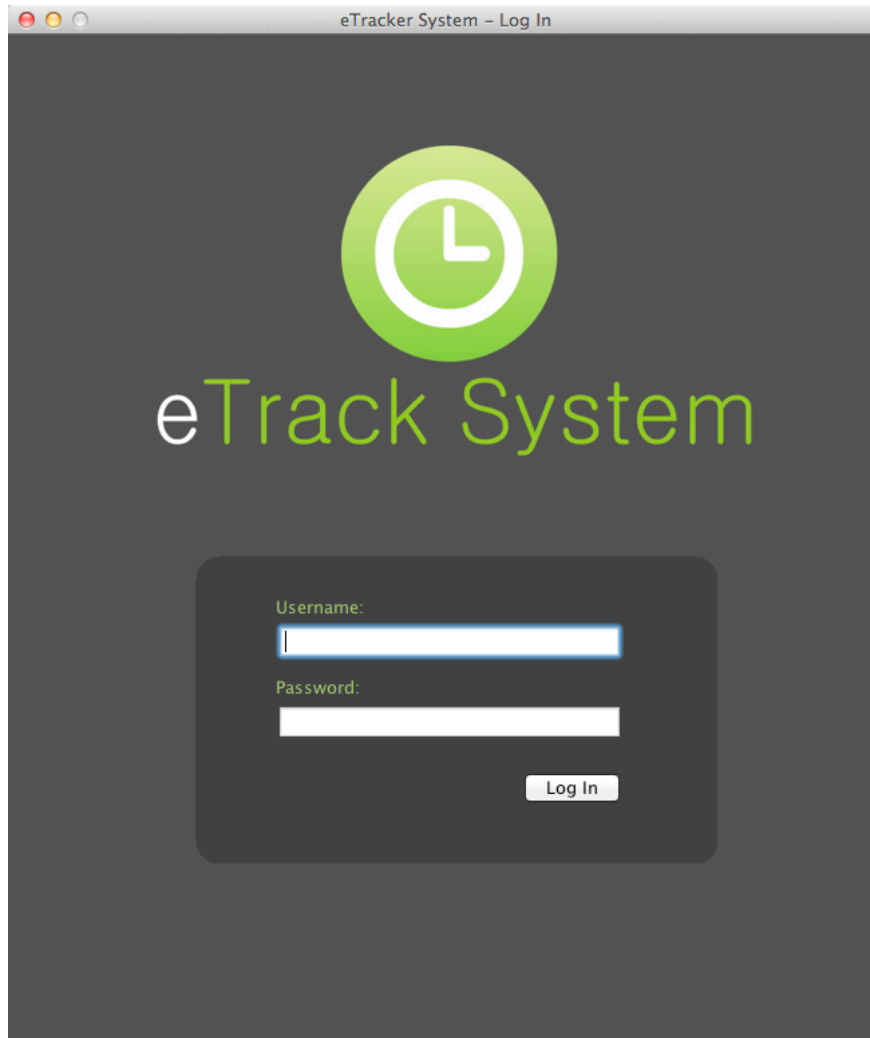
- 4) After verifying that the project has been removed, save the timesheet using the Save button at the bottom right.



2.3 Mileage

2.3.1 Log Mileage

- 1) Log into the eTrack system using your designated username and password.



- 2) Click the Mileage button at the top of the screen.



- 3) Find the first available empty row. If no rows are empty, one can be added via the + icon.



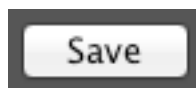
- 4) Under the Date heading, enter in the date that the travel occurred.

- 5) Under the Miles heading, enter in the total number of miles incurred that day for the particular project. For example, if it was round trip, add together both legs of the trip and put the total in the same field.
- 6) Under the Description heading, briefly describe the nature of the trip and its necessity.
- 7) Within the Project drop down list, choose the project associated with the expense. If the project to which you must log the mileage is a Client Project and the Client Project is not available in the drop down list, contact an administrator.
- 8) Choose one of the two billing options, "Bill Client" or "Reimburse."
- 9) Verify the accuracy of the information.

The screenshot shows the 'Mileage' tab in the eTrack system. The form includes a sidebar with 'Current', 'Previous', and 'Other' buttons. The main form area contains the following fields and controls:

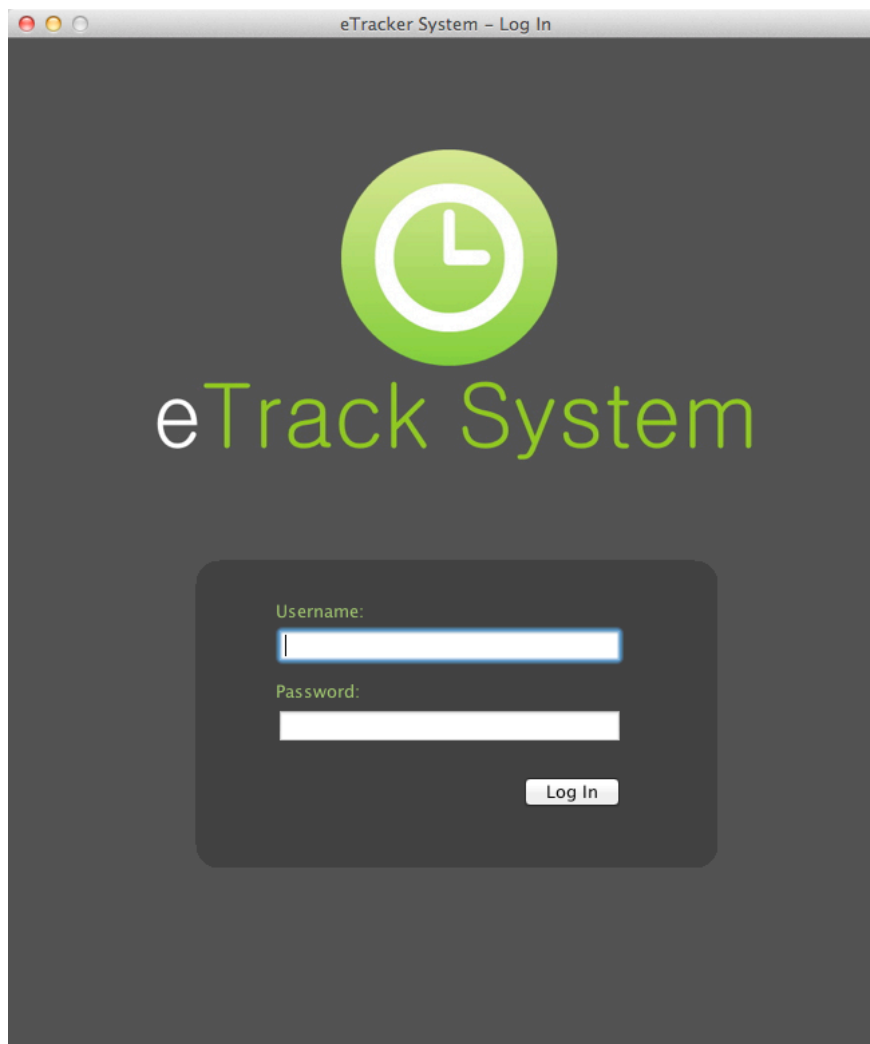
- Date:** Dec 5, 2011
- Miles:** 87
- Description:** Meeting with client (ZMG)
- Project:** PR941 (dropdown menu)
- Billing Options:** Radio buttons for 'Bill Client' and 'Reimburse'.
- Summary Statistics:**
 - Reimbursement rate (per mile): 1.2
 - Mileage threshold: 87
 - Reimbursement this period: 130.5
- Buttons:** 'Save' and 'Submit' buttons.
- Logout:** A link at the bottom right corner.

- 10) Click the Save button at the bottom right.



2.3.2 Remove Mileage Expense

- 1) Log into the eTrack system using your designated username and password.



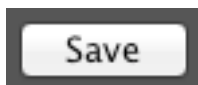
- 2) Click on the Mileage Button at the top of the screen.



- 3) Click the – icon that is adjacent to the expense that is to be deleted.



- 4) After verifying that the mileage has been removed, save the timesheet using the Save button at the bottom right.



2.4 Submitting Timecard

Once the timecard is completed and all expenses, activities, and mileage have been recorded, the user may submit it by clicking the Submit button at the bottom right.



Before doing so, the user should ensure that the following conditions are met:

- 1) That no activity total exceeds 24 hours in a single day
- 2) That the total duration of all activities on a timecard exceeds the consultants assigned minimum hours
- 3) That no mileage entry is submitted that is below the mileage threshold (and thus not eligible for reimbursement)
- 4) That all expense categories and projects have been reported accurately.

Once the consultant submits a timesheet, it can no longer be edited.