



# Over Time Equalization System Functional Specifications









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#### **Document Revision History**

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1.01	11/28/2012	Hemant Sharma	UI Added, Active Directory Authentication added
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### 1.0 Introduction

#### **Purpose**

This SRS describes the software functional and nonfunctional requirements for release 1.0 of the Over Time Equalization System (OTES). This document is intended to be used by the members of the project team that will implement and verify the correct functioning of the system. Unless otherwise noted, all requirements specified here is high priority and committed for release 1.0.

#### **Project Scope and Product Features**

The goal of the system is to achieve Over Time Equalization to allow all the employees same opportunity to work overtime. The system would provide efficient means to analyses, request and record overtime hours, enabling supervisors to quickly identify employees eligible for overtime based upon their ranking. Below are the general business rules used in OTES.

- Supervisors are responsible to ask hourly employees to work overtime
- Each week, employees are ranked from lowest worked OT to highest within each group.
- Employees with lowest worked overtime are asked first
- When hours are same, the seniority and if required the last name then the first name is used to determine who should be asked first to work overtime.
- Records are kept for acceptance and refusal for OT
- Employees are grouped by department(s), job classification(s) and shift
- A supervisor may re-assign personnel from one group to another after the Monday recalculation
- The records of overtime worked is kept on a spreadsheet that is posted on the floor
- If an employee changes from one group to another, the employee takes the average hours of the group being assigned to.
- The calculation of average hours in a group is dependent on the number of people in the group
- A snapshot of the start of the week ranking and end of week ranking must be kept in the system
- The floor spreadsheet has a provision for job assignment to be listed
- At the beginning of the New Year, the OT hours of the lowest person in the group are set to "0" and all others are adjusted by the same amount to maintain their ranking in the group

#### **Exceptions:**

- Employees may be moved during the week to a secondary OTES group to work OT. Such employee after working 20 hours in the secondary group will take the starting average hours of the group and be ranked accordingly
- Upon return to the primary group, the worked OT hours will be retained and be added to his starting hours for the prior week

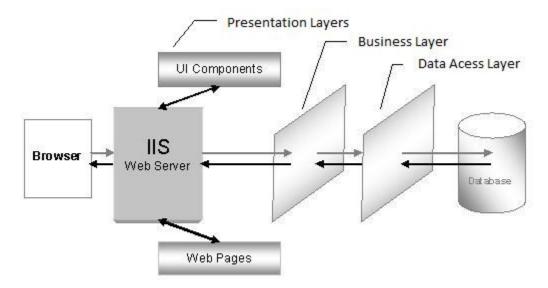




- Employees may be kept in a group for an additional week(s) to train replacements even though they have moved on paper. They remain in the group as they had not left the group.
- The OT may not be recalculated due to Christmas or summer shutdown scheduling. The ranking then holds for 2 weeks.

#### **System Overview**

OTES is a new application that would replace the current Excel based process. OTES will be a secure web based application hosted within Intranet or Internet environment. Development platform will utilize latest Microsoft technologies including .NET 4.0 framework. Application general architecture will be n-tier with minimum three application layers consisting of presentation, business and data access layers.







## 2.0 System Access

#### **Description**

System, Application and OTES are often used synonymously. Requirements for System Access define how KBI users will be able to access the system and perform their relevant tasks. The system shall be developed using MS Web technologies utilizing n-tier architecture. Multiple uses should be able to access the application simultaneously without having to install any special software on their client computers.

Req. ID	Requirement	Business Rule
SA-01	System shall be a Web based application accessible through Intranet or Internet networks.	<ul> <li>Access application using Internet Explorer 9.0 or higher; or Firefox 12.0 or higher</li> <li>Access application using a web URL</li> </ul>
SA-02	Allow access only to authorized users	<ul> <li>Users must enter a valid user ID and password</li> <li>OTES to integrate with KBI's Active Directory to authenticate users</li> </ul>
SA-03	Auto logout users with no activity	System shall auto logout a user if there is no activity for 20 minutes or more
SA-04	System access based upon the user roles	<ul> <li>System must maintain user credentials along with a user roles</li> <li>Users will have access to only those features and functions which are associated with their user roles.</li> </ul>







OVER TIME EQUILIZATION SYSTEM







## 3.0 System Roles

#### **Description**

OTES is a secure application providing role based access to various set of users. Each user profile will contain one System Role, which would govern the system access privileges for each user. Requirement table below lists system functions and features available for each System Role.

#### **Requirements**

Req. ID	Requirement	Business Rule
SR-1.0	Systems Administrator	<ul> <li>Super user, allow full access to the entire system functions and features</li> <li>Add, Edit, Delete, enable and disable users</li> <li>Maintain user profiles</li> <li>Assign user roles</li> <li>Allow access to Group/s to each user</li> <li>Add, Edit and Delete Departments</li> <li>Add, Edit and Delete Groups by Assigning Department and Job Classification</li> <li>Define a shared Directory for system to access ADP export files</li> <li>Force data update to refresh HR Data</li> <li>Set Annual holiday calendar</li> <li>Set Ranking Exclusion Periods for a year</li> <li>Set Annual Reset Date overtime hours</li> <li>View Over Time History for each Group</li> <li>Enter Over Time</li> <li>Assign Tasks</li> <li>Move Employee temporarily from one group to another</li> <li>View and Print Supervisor Report</li> <li>View and Print Floor Report</li> <li>View and Print Supervisor Report</li> <li>View and Print Other Reports as listed in Reports section</li> </ul>
SR-2.0	Supervisor	View Over Time History for each Group     Enter Over Time     Assign Tasks     Move Employee temporarily from one group to another     View and print reports     View and Print Supervisor Report
SR-3.0	Auditor	<ul> <li>View Over Time History for each Group</li> <li>View and Print Floor Report</li> <li>View and Print Supervisor Report</li> <li>View and Print other Reports as listed in Reports section</li> </ul>

#### Visualize

N/A





## 4.0 Import HR Data from ADP Export

#### **Description**

KBI maintains HR data within ADP systems. Employees, wages, departments, Job classifications and groups are maintained with ADP systems. On a weekly basis two output files are produced with any changes made during the week. Such out puts will be placed in a shared directory, the OTES will extract the ADP output files and update the system data with any changes reflected in ADP outputs.

Req. ID	Requirement	Business Rule
IMP-1.0	Run an automated process to update OTES data	<ul> <li>Run the process automatically on every SUNDAY at 11:00:01 PM</li> <li>Access shared directory as defined in the systems</li> <li>Search for weekly update files using the file naming convention rules</li> <li>Update OTES Data</li> </ul>
IMP-2.0	Shared Directory	<ul> <li>Systems Administrator to designate a shared directory for accessing ADP export files</li> </ul>
IMP-3.0	Data Files and Naming Convention	<ul> <li>Two data files: HRB and PayEx</li> <li>Naming convention to use HRB + Week Starting Date (mmddyyyy) without any spaces or special characters.</li> <li>Naming convention to use PayEx + Week Starting Date (mmddyyyy) without any spaces or special characters.</li> <li>For example HRB11252012 and PayEx11252012</li> </ul>
IMP-4.0	Data File Type and upload sequence	<ul> <li>Data fill shall be in the format of .csv</li> <li>Each file must have only 1 sheet with the same name as the file name</li> <li>Connect to the shared directory</li> <li>Check for File HRBmmddyyyy and PayExmmddyyyy where mmddyyyy = CurrentDate – 0 (if Current Day is Sunday) OR – 1 (if Current Day is Monday) OR – 2 (if Current Day is Tuesday) OR – 3 (if Current Day is Wednesday) OR – 4 (if Current Day is Thursday) OR – 5 (if Current Day is Friday) OR – 6 (if Current Day is Saturday). Consider leap year while performing date calculations.</li> <li>Upload HRBmmddyyyy if found</li> <li>Upload PayExmmddyyyy if found</li> </ul>
IMP-5.0	Data Format	<ul> <li>Match "Active Badge No" with "Employee Id"</li> <li>Ignore leading zeros</li> <li>Employee ID and Active Badge No must be numeric integer values</li> <li>HRBmmddyyyy csv file with HRBmmddyyyy Sheet</li> <li>Column B: Last Name         Valid Values:</li></ul>
		Column D: Employee Id     Valid Values:





	o 6 or less digits of 0 to 9
	4. Column E: Home email
	Valid Values:
	○ Letters A-Z
	○ Letters a-z
	o Digits 0 to 9
	<ul> <li>Characters: At Sign (@), Hyphen (-), Underscore (_) and Period (.)</li> </ul>
	5. Column F: Home Phone
	o Digits 0 to 9
	Slash (/) 6. Column G: Personal Wireless
	o Digits 0 to 9
	<ul> <li>Characters: Hyphen (-), Underscore (_), Period (.), and Forward</li> </ul>
	Slash (/)
	7. Column H: Work Pager
	o Digits 0 to 9
	<ul> <li>Characters: Hyphen (-), Underscore (_), Period (.), and Forward</li> </ul>
	Slash (/)
	8. Column I: Employee Status Type
	Valid Values:
	o Word "Active"
	o Word "On Leave"
	Word "Terminated"
	9. Column J: Status Eff. Date
	Valid Values:
	Date format: mm/dd/yyyy OR mm/dd/yy OR m/d/yyyy
	PayExmmddyyyy csv file with PayExmmddyyyy Sheet
	1. Column A: Active Badge No
	Valid Values:
	o 6 or less Digits of 0 to 9
	2. Column B: Hire Date
	Valid Vales
	<ul> <li>Date format: mm/dd/yyyy OR mm/dd/yy OR m/d/yyyy</li> </ul>
	3. Column C: Primary Labor Account
	Valid Vales
	<ul> <li>Composite value of 7 fields separated by a forward slash (/)</li> </ul>
	Department/JobCode/Shift/Company/EmployeeType/0/Foreman#
	Department, 305000, 51111, 60111, proyect ype, 6,10 terrains
IMP-6.0 File Upload Failure	File unlead failure can accur if the chared directors is un reachable
INT-0.0 File Opioad Failure	File upload failure can occur if the shared directory is un reachable
	One or both the Upload Files are missing
	Data file types are not csv type
	Data files contain more than 1 sheet
	Sheet name is different than the file name
	The file name is not in the format of HRBmmddyyyy or PayExmmddyyyy
	The date in the files name does not match with a date that falls on Sunday in the
	CURRENT Week
	Other hardware, network or system failures
	Incorrect data types can result in file upload failure
	"Employee ID" or "Active Badge No" values are not integer values
	Inconsistent data type
	Unsupported special characters
IMP-7.0 File Upload failure	Show an alert to Systems Administrator upon login with most recent data upload
notification	failures
	System to maintain data upload event log file
	Log file to maintain file upload success/failure events with date and time
IMP-8.0 On Demand /Force	
21. 2011.01.07	on demand or rorsed data aproduction be performed by Systems Administrators





<ul> <li>Systems Administrator must select a file to be uploaded</li> <li>All the conditions of "File Upload Failure" as mentioned above apply except th</li> </ul>	Data upload	<ul> <li>All the conditions of "File Upload Failure" as mentioned above apply except the files name field is ignored. The system will allow any filename without checking the mmddyyyy values in the file name</li> <li>Forced data upload will overwrite previously uploaded data and initialize the</li> </ul>
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N/A





## 5.0 Week Initialization

#### **Description**

A regular week starts from Sunday 11:00:01PM and ends at Sunday 11:00:00PM. At the start of the week, the system will extract the new HR data and initialize the new week with any changes. The HR data will be processed from a csv file which will be available in a designated directory. See "Import HR Data from ADP Export" section for more details.

Req. ID	Requirement	Business Rule
WI-1.0	Initialize the upcoming week's data through an automated batch process or a forced update process	<ul> <li>Each week starts from Sunday 11:00:01PM and ends on the following Sunday at 11:00:00.</li> <li>Check the system date and identify the current week with corresponding Starting and Ending Sundays</li> <li>Apply data update only for current week</li> <li>At 11:00:01PM trigger a batch process that extracts csv file with updated HR data</li> <li>Overwrite any existing data for the current week with every forced upda process</li> <li>Upload HRBmmddyyyy.csv</li> <li>Compare the following fields with the system database and update fields if changed <ol> <li>Last Name</li> <li>First Name</li> <li>Employee Id (Primary Key, Do not update)</li> <li>Home email</li> <li>Home phone</li> <li>Personal wireless</li> <li>Work Pager</li> <li>Employee Status Type</li> <li>Status Eff. Date</li> <li>Upload PayExmmddyyyy.csv</li> <li>Compare the following fields with the system database and update fields if changed</li> <li>Active Badge No. (Primary Key, Do not update)</li> <li>Hire Date</li> <li>Primary Labor Account</li> </ol> </li> <li>Parse the values in Primary Labor Account into 7 data fields each separated by a forward slash (/).</li> <li>Example 000740/660/3/R8P/IN/0/419</li> <li>Department – 000740</li> <li>Job Code – 660</li> <li>Shift – 3</li> <li>Company – R8P</li> <li>Employee Type – IN</li> <li>Unused Field – 0</li> <li>Foreman # - 419</li> <li>If any of the fields are changed, make an entry in the employee log file showing the original data and updated data with a time stamp</li> <li>Check for overtime hours recorded in advance for any employee in the</li> </ul>





		<ul> <li>Initialize the overtime hours for rest of the employees to 0, excluding those who have hours recorded in advance</li> <li>Check if an employee has been temporarily moved into a different group. Apply data update according to the rules defined in "Move Employee Temporarily into a Different Group" section</li> </ul>
WI-2.0	Adding New Employees, Departments and Job Codes based upon ADP data upload	<ul> <li>Check for any New Employee Id in HRB file</li> <li>Automatically create a new record with the new Employee Id or Active Badge No. and insert rest of the data from HRB and PayEx files</li> <li>Create and show an alert to Systems Administrator for new employee</li> <li>Check for any New Job Codes</li> <li>Create a new Job Code entry in the master data and show an alert to Systems Administrator</li> <li>Check for any New Department</li> <li>Create a new Department entry in the master data and show an alert to Systems Administrator</li> </ul>
WI-3.0	Auto initialize a week, without an HR update	<ul> <li>If the batch process does not find updated HRB and PayEx files, OR an ADP update fails due to any reason</li> <li>Auto initialize the new week using the prior week's data</li> </ul>

N/A





## **6.0 Configure Holidays**

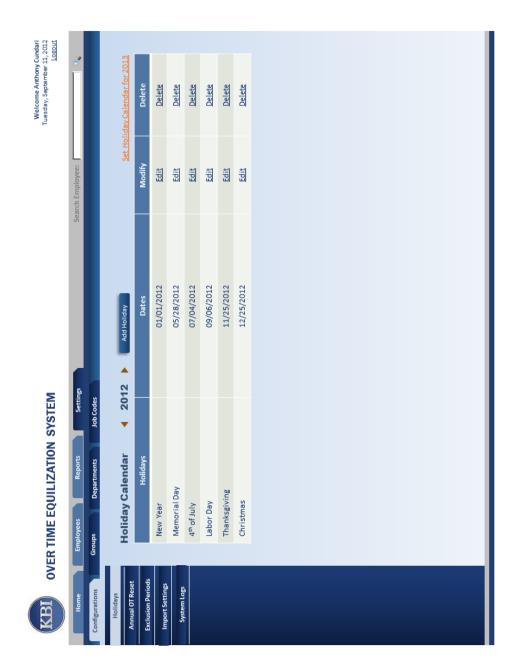
#### **Description**

Hours worked during the holidays are considered as overtime. The system will show holidays in different color, allowing supervisors to easily distinguish holidays from regular working days. Holidays can be defined for up to Two years in advance consisting of current years and the upcoming calendar year. Calendars will start from January 1<sup>st</sup> and end on December 31<sup>st</sup> of each year.

Req. ID	Requirement	Business Rule
CH-1.0	Set holiday calendar for current and upcoming years	<ul> <li>Authorized users based upon their assigned Role can have access to this function</li> <li>Allow user to create a list of holidays for the current year</li> <li>Allow user to create a list of holidays for next year in advance</li> </ul>
CH-2.0	Allow custom holiday list	<ul> <li>Allow user to add, remove or modify holidays based upon the company policies.</li> <li>To define a holiday, user must enter holiday name and a date. Holiday description will be an optional field.</li> </ul>
CH-3.0	While creating next year's holiday calendar, automatically copy the current year's holiday list to reduce data entry	<ul> <li>Current year holidays can be copied in the year</li> <li>While copying, keep the same holiday name and description</li> <li>Change the date to reflect the next year</li> <li>If a holiday falls on weekends, show an alert to change or confirm the holiday date</li> </ul>
CH-4.0	Modifying holiday list	<ul> <li>Authorized users can modify the holiday calendar for current, future or past years at any time.</li> <li>If dates get changed for the past holidays, system will warn user for possible data inconsistencies.</li> </ul>











## 7.0 Manage Groups, Departments and Job Classification Codes

#### **Description**

The system will manage the list of Groups and Departments. Authorized users will be able to add, delete or modify groups, departments and Job Classifications

Requirement	Business Rule
Create a list of Departments  Create a list of Job Classifications (Job Codes)	<ul> <li>Each employee is assigned a Department</li> <li>Departments are identified by a Department ID</li> <li>Authorized users will maintain the list of Departments by Adding Department/s</li> <li>Unused Department IDs can be Edited or Deleted</li> <li>New Departments ID imported form ADP, will automatically be added into the Department list</li> <li>Any new Department imported from ADP must be manually assigned to a Group</li> <li>Adding a new department from ADP will generate an Alert for Systems Administrator to associate the newly added Department to a Group</li> <li>Department will maintain the following fields         <ol> <li>Department ID (Numeric integer value)</li> <li>Department Description (Optional Text field)</li> </ol> </li> <li>Each employee is assigned a Job Classification Code</li> <li>Job Classifications are identified by a Job Code</li> <li>Authorized users will maintain the list of Job Codes by Adding Job Codes</li> <li>Unused Job Codes can be Edited or Deleted</li> <li>New Job Codes imported form ADP, will automatically be added into the Job Code list</li> <li>Each Job Code is associated with One Group</li> <li>Any new Job Code imported from ADP must be manually assigned to a Group</li> <li>Adding a new Job Code from ADP will generate an Alert for Systems Administrator to associate the newly added Job Code to a Group</li> <li>Job Classification will maintain the following fields</li> <li>Job Code (Alphanumeric value)</li> </ul>
Create a list of Groups	<ul> <li>Job Classification Description (Optional Text field)</li> <li>Each Employee is assigned to a Group based upon the Employee's Department and Job Classification</li> <li>Authorized users will maintain a list of Groups by Adding a Group ID</li> <li>Unused Group IDs can be Edited or Deleted</li> <li>Associate Department IDs and Job Codes to a Group</li> <li>All the employees matching with Department ID and Job ID will be automatically associated to a</li> </ul>
	Create a list of Departments  Create a list of Job Classifications (Job Codes)

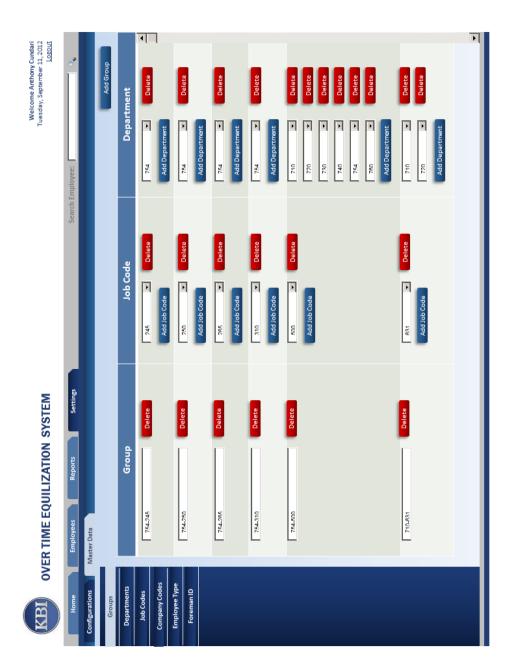




2. Associate a Job Code this Group; Job Code = 500 3. Associate multiple Department 1D to this Group; Department 1D = 710, 720, 730, 740 and 754 4. All the employees with Department 1D 5710, 720, 730 and 754 with Job Code = 500 will be automatically assigned to Group 754-500 5. Employee A with Department 1D = 710 & Job Code = 500 will be assigned to Group 754-500 6. Employee B with Department 1D = 740 & Job Code = 500 will be assigned to the same Group 754-500 6. Employee B with Department 1D = 740 & Job Code = 500 will be assigned to the same Group 754-500 6. Employee B with Department 1D = 740 & Job Code = 500 will be assigned to the same Group 754-500 6. Group will maintain the following fields 1. Group 1D (Alphanumeric value) 2. Group Description (Optional Text field) 1. Group 1D (Alphanumeric value) 2. Group Description (Optional Text field) 1. Group 1D (Alphanumeric value) 2. Group Description (Optional Text field) 1. For the field is morted and maintained within OTES Application for future use a The Company 1D is automatically added from ADP import 1. Authorized users can Add, Edit and Delete Company 1D without any effect upon the OTES Application for future use a The field has no functional use within the current scope of the project 1. The field is imported and maintained within OTES Application for future use 2. The Employee Type is automatically added from ADP import 2. Authorized users can Add, Edit and Delete Employee Type without any effect upon the OTES Application  MD-6.0 Create a List of "Unused Field" 2. Data import from ADP consists an Unused Field 3. The field has no functional use within the current scope of the project 4. The field is imported and maintained within OTES Application for future use 5. The field is imported and maintained within OTES Application for future use 6. The field is imported and maintained within OTES Application for future use 7. The field is automatically added from ADP import 8. Authorized users can Add, Edit and Delete the field without any effect upon the OTES		
3. Associate multiple Department ID to this Group: Department ID = 710, 720, 730, 740 and 754 4. All the employees with Department IDs 710, 720, 730 and 754 4. All the employees with Department IDs 710, 720, 730 and 754 with Job Code 500 will be automatically assigned to Group 754-500 5. Employee A with Department ID = 710 & Job Code = 500 will be assigned to Group 754-500 6. Employee B with Department ID = 740 & Job Code = 500 will be assigned to Group 754-500 6. Employee B with Department ID = 740 & Job Code = 500 will be assigned to Group 754-500 6. Employee B with Department ID = 740 & Job Code = 500 will be assigned to Group 754-500 6. Employee B with Department ID = 740 & Job Code = 500 will be assigned to Group 754-500 6. Employee B with Department ID = 740 & Job Code = 500 will be assigned to Group 754-500 6. Employee B with Department ID = 740 & Job Code = 500 will be assigned to Group 754-500 6. Employee B with Department ID = 740 & Job Code = 500 will be assigned to Group 754-500 6. Employee B with Department ID = 740 & Job Code = 500 will be assigned to Group 754-500 6. Employee B with Department ID = 740 & Job Code = 500 will be assigned to Group 754-500 6. Employee B with Department ID = 740 & Job Code = 500 will be assigned to Group 754-500 6. Employee B with Department ID = 740 & Job Code = 500 will be assigned to Group 754-500 6. Employee B with Department ID = 740 & Job Code = 500 will be assigned to Group 754-500 6. Employee B with Department ID = 740 & Job Code = 500 will be assigned to Group 754-500 6. Employee B with Department ID = 740 & Job Code = 500 will be assigned to Group 754-500 6. Employee B with Department ID = 740 & Job Code = 500 will be assigned to Group 754-500 6. Employee B with Department ID = 740 & Job Code = 500 will be assigned to Group 754-500 6. Employee B with Department ID = 740 & Job Code = 500 will be assigned to Group 754-500 6. Employee B with Department ID = 740 & Job Code = 740		1. Create a Group ID 754-500
Department ID = 710, 720, 730, 740 and 754 4. All the employees with Department IDs 710, 720, 730 and 754 with Job Code 500 will be automatically assigned to Group 754-500 5. Employee A with Department ID = 710 & Job Code = 500 will be assigned to Group 754-500 6. Employee B with Department ID = 740 & Job Code = 500 will be assigned to Group 754-500 6. Employee B with Department ID = 740 & Job Code = 500 will be assigned to the same Group 754-500 6. Company ID (Alphanumer value) 1. Group ID (Alphanumer value) 2. Group Description (Optional Text field)  MD-4.0 Create a list of Companies  ### Create a list of Companies  ### Create a list of Company ID ### The field is imported and maintained within OTES Application for future use 1. The Gompany ID is automatically added from ADP import 4. Authorized users can Add, Edit and Delete Company ID ### Without any effect upon the OTES Application  ### Data import from ADP consists an Employee Type 1. The field is imported and maintained within OTES Application for future use 1. The field is imported and maintained within OTES Application for future use 2. The Employee Type is automatically added from ADP import 4. Authorized users can Add, Edit and Delete Employee Type without any effect upon the OTES Application  ### Data import from ADP consists an Unused Field 1. The field is imported and maintained within OTES Application for future use 2. The field is imported and maintained within OTES Application for future use 3. The field is automatically added from ADP import 4. Authorized users can Add, Edit and Delete Employee Type without any effect upon the OTES Application  #### Data import from ADP consists an Unused Field 3. The field is imported and maintained within OTES Application for future use 4. The field is automatically added from ADP import 5. Authorized users can Add, Edit and Delete the field without any effect upon the OTES Application for future use 5. The field is automatically added from ADP import 6. The field is automatically added from ADP import 6. Th		
A. All the employees with Department IDs 710, 720, 730 and 754 with Job Code 500 will be automatically assigned to Group 754-500   S. Employee A with Department ID = 710 & Job Code 500 will be automatically assigned to Group 754-500   S. Employee B with Department ID = 740 & Job Code = 500 will be assigned to Group 754-500   Group will maintain the following fields		3. Associate multiple Department ID to this Group:
### Tage		Department ID = 710, 720, 730, 740 and 754
automatically assigned to Group 754-500 5. Employee A with Department ID = 710 & Job Code = 500 will be assigned to Group 754-500 6. Employee B with Department ID = 740 & Job Code = 500 will be assigned to Group 754-500 6. Employee B with Department ID = 740 & Job Code = 500 will be assigned to Group 754-500 9. Group will maintain the following fields 1. Group ID (Alphanumeric value) 2. Group Description (Optional Text field) MD-4.0 Create a list of Companies 9. Data import from ADP consists a Company ID of the project 1. The field has no functional use within the current scope of the project of the		4. All the employees with Department IDs 710, 720,
S. Employee A with Department ID = 710 & Job Code = 500 will be assigned to Group 754-500		730 and 754 with Job Code 500 will be
S. Employee A with Department ID = 710 & Job Code = 500 will be assigned to Group 754-500		automatically assigned to Group 754-500
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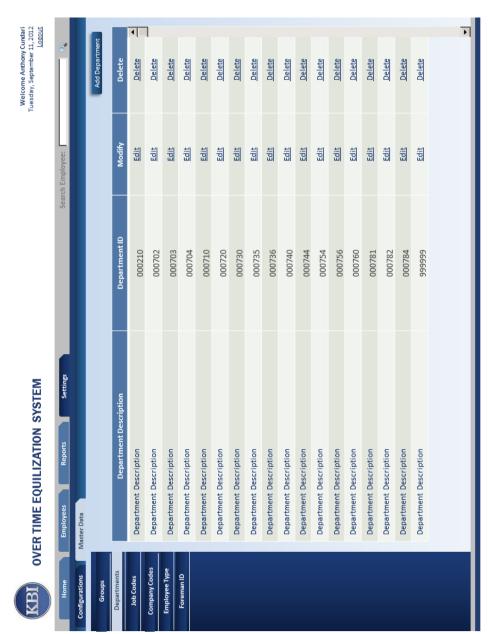






















## 8.0 Employee Profile

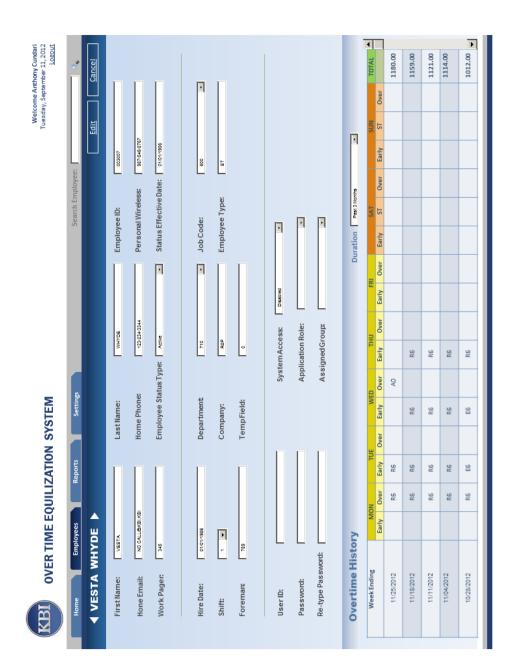
#### **Description**

Employee profile maintains the employee personal information and the OTES access rights. Besides the fields imported from ADP export, the employee profile maintains other necessary information which may be used in future as the scope of OTES broadens.

Req. ID	Requirement	Business Rule
EP-1.0	Manage Employee Personal Information	<ul> <li>Employee personal information is data is added through ADP data import</li> <li>Some of the fields are not imported</li> <li>New employees are created automatically when an new "Employee Id" or "Active Badge No" is encountered during ADP data upload</li> <li>Authorized users can manually add new employees</li> <li>Authorized users can edit Employee Personal information</li> <li>Employees with no work history can be deleted</li> <li>Following fields are maintained: <ol> <li>Last Name (ADP Imported)</li> <li>First Name (ADP Imported)</li> <li>Employee Id (ADP Imported)</li> <li>Home email (ADP Imported)</li> <li>Home phone (ADP Imported)</li> <li>Personal wireless (ADP Imported)</li> <li>Work Pager (ADP Imported)</li> <li>SSN</li> <li>Sex Code</li> <li>Birth Date</li> <li>Employee Status Type (ADP Imported)</li> <li>Status Eff. Date (ADP Imported)</li> </ol> </li> <li>Status Eff. Date (ADP Imported)</li> </ul>
EP-2.0	Manage Employee Job Profile	<ul> <li>Following fields are maintained:</li> <li>1. Hire Date (ADP Imported)</li> <li>2. Department (ADP Imported)</li> <li>3. Job Code (ADP Imported)</li> <li>4. Shift (ADP Imported)</li> <li>5. Company (ADP Imported)</li> <li>6. Employee Type (ADP Imported)</li> <li>7. Unused Field (ADP Imported)</li> <li>8. Forman (ADP Imported)</li> <li>9. Division Code</li> <li>10. Location Code</li> </ul>
EP-3.0	Maintain Employee's overtime work history	<ul> <li>Keep a weekly record of employee's overtime work history as recorded by the employee's supervisors</li> </ul>
EP-4.0	Manage Employee's access rights to the OTES Application	<ul> <li>Manage Employee's System Access Role</li> <li>Restrict Employee's access to the system Enabling or Disabling System Access</li> </ul>











### 9.0 Record Overtime

#### **Description**

Recording overtime is the key function of the OTES system. Supervisors access the system and record the overtime for employees within the Groups assigned to them. The system equalizes overtime for employees within a shift in a Group and sorts employees in accessing ranking of overtime. Therefore, employees with the least number of overtime hours ("Low Man Hours") rank on the top and the highest number of overtime hours ("High Man Hours") at the bottom of the list. Employees with least number or overtime get the first preference to be asked for overtime.

Req. ID Requirement	Business Rule
O-1.0 Authorized users access OTES to view a overtime	<ul> <li>Authorized users log into OTES and view by default the current week overtime card for the groups they are assigned to</li> <li>The system lists employees from lowest to highest number of overtime hours for each shift</li> <li>A second level of sort is applied upon the "Hire Date" (Seniority Date) in the descending order</li> <li>Third level of sort is applied upon Last Name in the ascending order</li> <li>Fourth level of sort is applied upon First Name in ascending order</li> <li>The overtime card is shown from Monday to Sunday</li> <li>Monday's 3st shift starts at 11:00:01 PM Sunday (an hour before the Monday starts)</li> <li>Overtime is entered for Early hours or After hours</li> <li>Refused overtime is counted toward employee's total overtime</li> <li>Overtime is entered starting with a letter code and number of hours</li> <li>Below are the codes</li> <li>W - Worked on Weekend. Allow assisted entry of W12 when typed the letter "W" in Saturday's standard day column. Change to W16 for Sunda</li> <li>R - Refused</li> <li>A - Absent</li> <li>E - Early (Early Hours)</li> <li>O - Over (After Hours)</li> <li>Example</li> <li>W16 - Represents 16 hours overtime on a weekend</li> <li>R6 - Represents 6 hours overtime refused</li> <li>A0 - Represents 6 hours of overtime worked in early hours</li> <li>O6 - Represents 6 hours of overtime worked in after hours</li> </ul>





RO-2.0	Filter out Terminated employees from the list	<ul> <li>Employees who have their "Employee Status Type" as "Terminated" should be excluded from the list shown for overtime data entry</li> </ul>
RO-3.0	Show employees on leave in a different color code	<ul> <li>Employees who have their "Employee Status Type" as "On Leave" should be shown in a different color to distinguish easily</li> </ul>
RO-4.0	Show employees who are temporarily assigned to a new group in a different color code	<ul> <li>Employees who are assigned to a group temporarily, such employees should be shown in different color code for the duration of the temporary assignment</li> </ul>
RO-5.0	Allow recording of overtime hours in advance for upcoming weeks	<ul> <li>Supervisors can enter overtime hours for upcoming week in the same manner just as entering the hours in the current week</li> <li>Navigate to the upcoming week and enter the overtime hours same rules apply Req. ID RO1.0</li> <li>In the event where an employee has been assigned overtime hours in advance, and ADP update places the employee into a new group, previously entered overtime hours will reset to "0" in the original group for that employee, and show an alert to Supervisor of such change.</li> </ul>

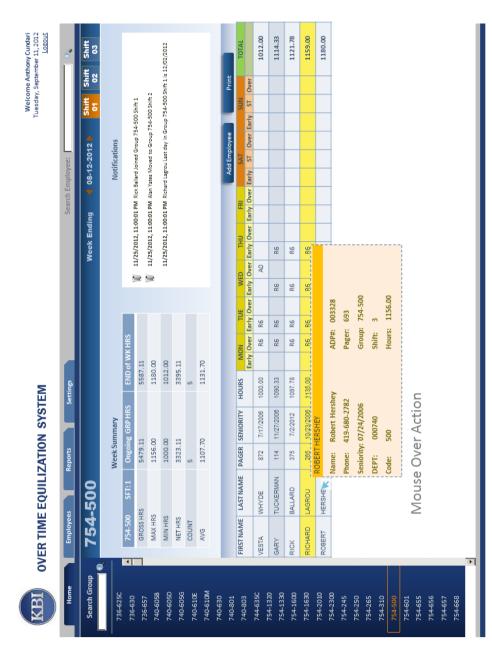






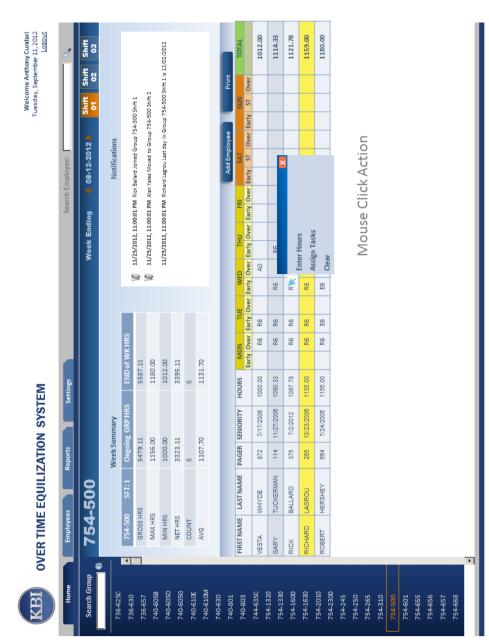
















## 10.0 Assign Tasks

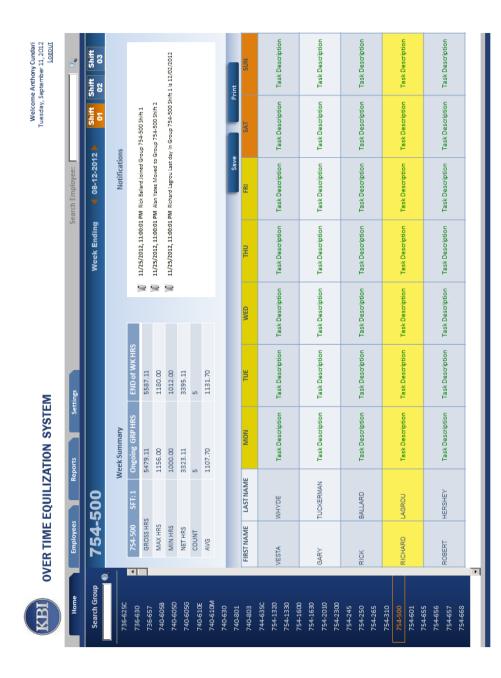
#### **Description**

In addition to assigning overtime, supervisors can choose to assign Tasks to any employee for each day of the week. Assigned tasks can then be printed on a floor report.

Req. ID	Requirement	Business Rule
AT-1.0	Allow task to be entered for any day of the week for each employee	<ul> <li>Supervisors can enter tasks for any employee by selecting a day for an employee on the overtime card</li> <li>Supervisors can print a report that includes the assigned tasks</li> <li>Tasks can be assigned in advance along with the overtime hours for future weeks</li> </ul>











## 11.0 Equalization of Hours within a Group

#### **Description**

Equalization of hours takes place within each shift of a Group. A group may contain multiple departments or job codes, therefore equalization of hours may combine multiples departments and job codes within a shift.

#### **Requirements**

Req. ID	Requirement	Business Rule
EQH-1.0	Rank overtime hours in a shift of a group	<ul> <li>The ranking of overtime hours is performed upon each shift</li> <li>A shift may contain employees from multiple Departments</li> <li>A shift may contain employees from multiple Job Codes</li> <li>As long as these Departments and Job Codes are associated with a Group, overtime hours equalize in a shift, without any effects of department or job code changes</li> <li>For example: <ol> <li>Group 754-500 has Department 710, 720, 730, 740, and 754 assigned to.</li> <li>If an employee changes the department from 710 to 740, but remains in the same shift, will have no effect on his/her overtime ranking</li> <li>Same applies if the Group had more than one Job Codes assigned to</li> <li>However if an employee changes the shift but remains in the same Department, he/she will take the average hours of the new shift being assigned to.</li> </ol> </li> </ul>
		<ol><li>Same applies if an employee moves into a different Group</li></ol>

#### Visualize

N/A





## 12.0 Move Employee Temporarily into a Temporary Group

#### **Description**

At times employees may be required to work in a Group or Shift temporarily, however they may officially be assigned to a different Group. Assignment of an employee to a group is primarily governed by his/her Department and Job Code along with a Shift in a Group. The data for an employee's department, job code and shift is managed in ADP system. Upon weekly updates from ADP export, OTES system updates any changes related to employee's department, job code or shift and changes employee's group according to the group settings. The system would allow an employee to move temporarily into a different group to work, although, he/she may officially be assigned to a different group.

Req. ID	Requirement	Business Rule
MET-1.0	Move Employees from one group to another group or shifts	<ul> <li>Assign a new group or shift to an employee temporarily</li> <li>Temporary move can assign employees who have "Employee Status Type" as "Active"</li> <li>Assign the move start date and end date</li> <li>From the start date until the end date, the employee is assigned to Two groups: "Official Group", The group assigned by ADP data, and "Temporary Group", group assigned by an authorized OTES user.</li> </ul>
MET-1.0A	Temporary move results employee being moved into the same group where he has been working prior to his official move. (Move on Paper)	<ul> <li>Highlight the employee in color code to distinguish as a temporary employee in the group</li> <li>Employee's ranking in his original(now temporary) group remains unchanged as though he had never moved</li> <li>The OT hours worked during temporary move are kept separate and these hours are added into employee's official group hours upon his return</li> <li>Example</li> <li>Employee A has been working in Group 754-1320</li> <li>Employee A has been assigned to Group 754-1600 based upon ADP data upload</li> <li>Supervisor of Group 754-1320 wish to retain employee A temporarily into Group 754-1320</li> <li>Supervisor of Group 754-1320 assigns a temporary group of 754-1320 to employee A with start date and end date</li> <li>The temporary assignment supersedes the official assignment and the employee is removed from the official group and placed into temporary group for the duration of the temporary move</li> <li>Starting overtime hours for employee A in temporary group will be: Overtime hours of the employee in group 754-1320 prior to his move + Overtime hours in Group 754-1600 if any</li> <li>Employee will continue to accumulate overtime hours separately during his stay in the Temporary group</li> <li>Once the employee moves into his official group, he'll take the average hours on his official group on the day of his official move + the overtime hours he worked during his stay in the temporary</li> </ul>



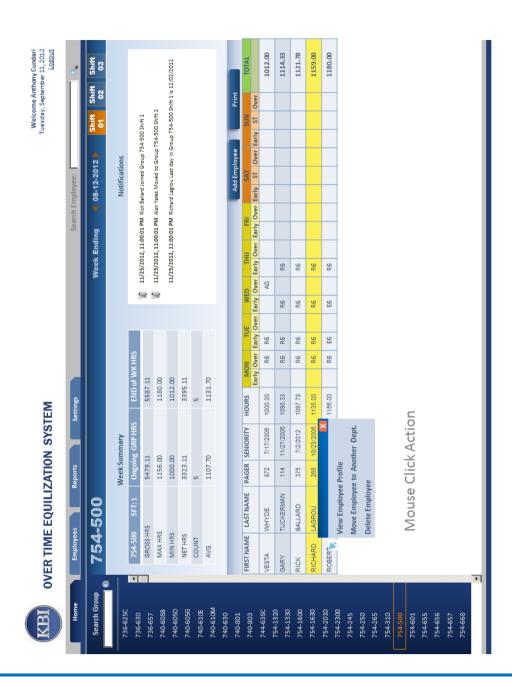


		group
MET-1.0B	Temporary move to any other group	<ul> <li>Highlight the employee in color code to distinguish as a temporary employee in the group</li> <li>Employee's ranking in the temporary group starts with none (being in the last).</li> <li>Supervisor of the temporary group starts ranking by manually entering the average hours as the starting hours for this employee</li> <li>Example</li> <li>Employee A has been working in Group 754-1320</li> <li>Employee A has been assigned to Group 754-1600 by an authorized user</li> <li>Employee A's ranking in Group 754-1600 is at the bottom</li> <li>Supervisor of Group A (or any authorized user) decides to start ranking Employee A by manually entering average hours for employee A.</li> <li>Employee A is ranked according to the hours in Group 754-1600</li> <li>Employee will continue to accumulate overtime hours separately during his stay in the Temporary group</li> <li>Once the employee moves into his official group, he'll carry take the overtime hours he worked during his stay in the temporary</li> </ul>
MET-2.0	Handle employee transfer automatically based upon the move (transfer) start date and end date	<ul> <li>group</li> <li>To assign an employee temporarily, supervisors must enter a transfer start date and a transfer end date</li> <li>Start date must take into account the shift start date.</li> <li>Although Monday's first shift starts at 11:00:01 PM on prior Sunday, The move still remains effective from Monday</li> <li>On the Move Start Date, remove employee listing from employee's official group and show the employee into the assigned Temporary Group listing</li> <li>Following day of the Move End Date, remove employee listing from the Temporary Group and list the employee into the Official Group</li> <li>Show a reminder to supervisors of Temporary Group about the date of transfer</li> <li>Supervisors may extend or reduce the Move End Date</li> </ul>
MET-3.0	Ranking in the Temporary Group	<ul> <li>An Employee moved into a temporary group is listed in the last without being ranked by default.</li> <li>As the employee achieves 16 hours of work, an automatic alert is created and shown to his supervisor upon login</li> <li>Supervisor starts ranking of the employee by assigning average hours of the group.</li> <li>OTES does not automatically assign the average hours, supervisors are required to enter the starting (average) hours manually.</li> <li>Supervisor are free to enter the group's actual average hours or choose to assign any amount of average hours to affect the ranking</li> <li>To generate an alert, OTES calculates the worked hours based upon the number of days in the group + any overtime hours. Worked hour rules are listed below:</li> <li>1 day in standard shift = 8 worked hours</li> <li>8 Early or after OT hours = 6 worked hours (OT hours = worked hours * 1.5)</li> <li>12 OT hours on Saturday = 8 worked hours (Saturday OT hours =</li> </ul>





- worked hours \* 1.5)
- 16 OT hours on Sunday = 8 worked hours (Sunday OT hours = worked hours \* 2)
- For example
- Employee works 2 standard shifts (8+8) = 16 hours >> an alert is generated
- Employee works 1 standard shift + 8 early hours (8+6) = 14 hours
   >> an alert is NOT generated







## 13.0 Average Hours calculation

#### **Description**

Average hours are calculated for each shift in a group. Each week maintains a starting week average and the ending week average. Any new employee joining a shift in a group is assigned the week's starting average hours. Therefore, having the same ranking for overtime as the rest of the employees in the group.

#### **Requirements**

Req. ID	Requirement	Business Rule
AVG-1.0	Average hour calculation is systems internal process and does not require any user intervention. Calculate and maintain every week's starting average and ending average	<ul> <li>Prior week's ending average becomes to next week's beginning average</li> <li>Maintain a running calculation of average in current week's ending average. Average updates as the overtime hours get recorded.</li> <li>Count the number of employees in a shift within a group</li> <li>If the number of employees = 0, The average = 0</li> <li>If the number of employees = 1, The average = Employee's overtime hours</li> <li>If the number of employees = 2, The average = Total Hours/2</li> <li>If the number of employees &gt;= 3, The average = (Total Hours - Max Hours - Min Hours) / (Number of Employees - 2)</li> </ul>
AVG-2.0	Effect on average hours with employees on leave	<ul> <li>Employees with "Employee Status Type" as "On Leave" remain in the average calculation for 28 calendar days from "Status Eff. Date". 28 days are counted including the first day of status change.</li> <li>On the 29<sup>th</sup> day, employees with "On Leave" status are removed from the list</li> </ul>

#### **Visualize**

N/A





## 14.0 Annual Overtime Reset

#### **Description**

Overtime reset is once a year process that initializes the number of overtime hours for all the employees while maintaining the ranking consistent year to year. Employees with the lowest number of hours in every shift of a group are rest to 0 overtime hours and all the remaining employee's hours in the shift are adjusted down by the same number of hours

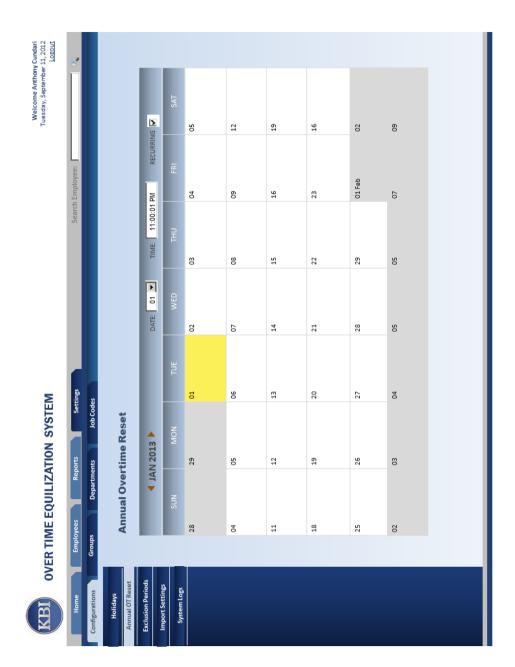
#### **Requirements**

Req. ID	Requirement	Business Rule
AOR-1.0	Annual reset is a once a year process. Systems Administrators set a reset date for system to automatically reset the overtime hours for all the employees in every group on that date.	<ul> <li>Systems Administrator to define an annual Reset Date and Reset Time.</li> <li>Reset date can be set once, and the system will automatically reset the hours on that date every year</li> <li>On the defined date and Time, the system will reset all the overtime hours for all the employees in the system, including employees On Leave, and excluding Terminated Employees</li> <li>The process of resetting the hours includes subtracting the min hours for each shift from each employee's hours in that shift. Resulting the Lowman Hours to "0".</li> <li>Annual Reset = Group.Shift.EmployeeMax – Min Hours, Group.Shift.EmployeeNext – Min Hours Group.Shift.EmployeeNin – Min Hours</li> <li>Hours for the employees working in a temporary group at the time of reset will be calculated based upon the following rules:</li> <li>Employee's hours = Hours in his official group + hours his temporary group</li> <li>Hours for the employee being in the temporary group will be adjusted in both of his groups (Official and Temporary).</li> <li>The process is irreversible</li> </ul>
AOR-2.0	Define Annual Overtime Reset Date	<ul> <li>Administrator to set Annual Reset date and time as recurring or onetime</li> <li>Recurring reset date will automatically set itself for on the same date for future years</li> <li>Onetime setting will require administrators to set the date every year</li> </ul>





### Visualize







# 15.0 Ranking Exclusion Periods

#### **Description**

During a calendar year, KBI observes certain periods that shall be excluded from overtime hour ranking. Systems administrators must define these periods every year with period start date and end date. During exclusion periods, the system will not rank the overtime for all the employees.

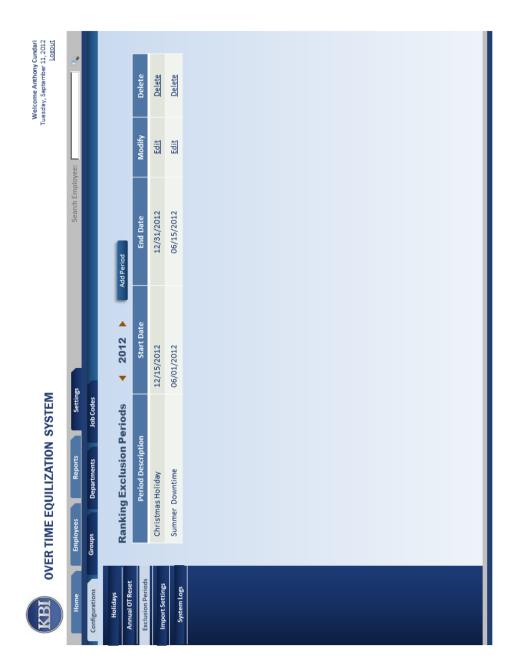
#### **Requirements**

Req. ID	Requirement	Business Rule
RX-1.0	Set Exclusion periods	<ul> <li>Allow Systems Administrators to define one or more exclusion periods in a year</li> <li>Each exclusion period will have a Start Date and an End Date</li> <li>During the exclusion period, employee's rank order will remain same (regardless of their OT hours) as one day prior to the exclusion start date.</li> <li>Ranking will resume normally thereafter</li> </ul>
RX-2.0	Define Exclusion Periods	<ul> <li>Administrators to create exclusion periods at the beginning of the year</li> <li>Name the exclusion Period</li> <li>Set the Start Date</li> <li>Set the End Date</li> </ul>





### Visualize







# 16.0 Reports

### **Description**

System will generate a predefined set of reports which can be viewed, saved, printed or exported into Excel or PDF

### Requirements

Req. ID	Requirement	Business Rule	
RP-1.0	Weekly Floor Report	• TBD	
RP-2.0	Weekly Supervisor Report	• TBD	

#### Visualize

**TBD** 





## 17.0 External Interface Requirements

#### **User Interfaces**

User interfaces are to be developed using ASP and ASP Controls. Client side validation using JavaScript

#### **Hardware Interfaces**

No Special Hardware requirements a necessary

#### **Software Interfaces**

External software interfaces are limited to csv file uploads

#### **Communications Interfaces**

Communication interfaces are within Intranet using TCP/IP protocols User Authentication against corporate Active Directory. Role authorization is maintained within OTES.





## **18.0 Other Nonfunctional Requirements**

#### **Performance Requirements**

PE-1: The system shall accommodate 30 users during the peak usage time window of 8:00am to 5:00pm local time, with estimated average session duration of 8 minutes.

#### **Safety Requirements**

No safety requirements have been identified. Safety requirements primarily pertain to working conditions, electronic devices and machineries where the system will be used such as warehouse locations, building temperature, hand held electronic devices, bar code scanners and/or medical equipment, etc.

#### **Security Requirements**

- SE-1: All network transactions that involve user identification and password information shall be encrypted.
- SE-2: System access via session management. No access to any content via random URL
- SE-3: Maintain log file according to the audit trail rules.
- SE-4: System access according the rights identified in section User Roles
- SE-5: Maintain log file according to the audit trail rules.





# 19.0 Revisions and Observations

#### Dated 12/04/2012

Reference	Comment	Resolution
1-6	Bullet 4: After sorting by last name, then sot by first name	Document updated
1-6	Bullet 1: Move is done in OTES by supervisor to secondary OTES group  1. Supervisor enters the move time 2. OTES calculates balance of STD shift + OT hours worked in secondary group and issues an alert to supervisor when the balance of hours reaches 16. The alert remains active until the employee the employee is included into the ranking 3. Supervisor triggers average hours	Requirement Redefined, see MET-3.0 in section 12.0 "Move Employee Temporarily into a Temporary Group"
1-6	Bullet 3 & Bullet 4	Internal review, no change required
2-8	SA-2.0: Use AD to authenticate	Requirement modified to reflect authentication against Active Directory. See SA-2.0 in section 2.0 "System Access"
2-8	SA-3.0: Change 60 minutes to 20 minutes	Requirement modified, see SA-3.0 in section 2.0 "System Access"
3-10	System Role maintenance	Internal review, no change required
4-11	IMP-1.0 B2; IMP-2.0 B1; IMP-4.0 B1, B2	Internal review no change required
4-11	IMP-5.0 B1: Reverse match Active Badge No to Employee ID	Requirement modified, see IMP-5.0 in section 4.0 "Import HR Data from ADP Export"
4-13	IMP-8.0 B5: "Initialize the Week", is this a reprocess?	Forced data update re-processes the ADP data overwriting previous data for the week. Clarification only, No change required
5-14	WI-1.0 B13: Example – holidays, Monday early in, etc.	Clarification only, no change required
5-14	WI-2.0 B2: Not needed since data feeds are	Requirement modified, See WI-





from HRB to PayEx	2.0 in section 5.0 "Week Initialization"
WI-3.0 B2: Example 2 <sup>nd</sup> week of Christmas/4 <sup>th</sup> of July, etc.	Clarification only, no change required
CH-2.0: Is this simply a modification? How a 2 day holiday handled? Thanksgiving	One holiday is considered 1 day. Multiple days need to be defined as multiple holidays. Defined holidays are color coded shown similarly as weekends. Clarification only, no change required
B4: Deleting a department has no effect on historical data?	Yes, historical data remains intact. Clarification only, no change required
B6: A department can be associated with one or more groups. 710-605E, 710-610 etc.	Requirement modified, see MD- 1.0 in section 7.0 "Manage Groups, Departments and Job Classification Codes"
Job classifications are identified by a Job Codes	Clarification. Modified the sentence correctly.
Deleting a Job Code has no effect on historical data?	Yes, historical data remains intact. Clarification only, no change required
B3 Deleting a Group ID has no effect on historical data?	Yes, historical data remains intact. Clarification only, no change required
Create a list of Companies Create a list of Employee Type Create a list of "Unused Field" Create a List of Foreman IDs	Confirmation, no change required
EP-1.0 B4: New Employee definition? Authorized user is Systems Admin? What is an Add	New employees can be added into OTES independent of data imports from ADP. This requirement is mainly for future use with additional HR functions.  Authorized users are those who are qualified to perform certain actions based upon their System Role. See section 3.0 "System
	WI-3.0 B2: Example 2 <sup>nd</sup> week of Christmas/4 <sup>th</sup> of July, etc.  CH-2.0: Is this simply a modification? How a 2 day holiday handled? Thanksgiving  B4: Deleting a department has no effect on historical data?  B6: A department can be associated with one or more groups. 710-605E, 710-610 etc.  Job classifications are identified by a Job Codes  Deleting a Job Code has no effect on historical data?  B3 Deleting a Group ID has no effect on historical data?  Create a list of Companies Create a list of Employee Type Create a list of "Unused Field" Create a List of Foreman IDs  EP-1.0 B4: New Employee definition? Authorized user is Systems Admin?





		Add relates to adding a new employee
		Clarification only, no change required
8-23	EP-1.0 B5: Edit Employee's personal Info. Restrictions:	Restrictions are applied based upon the System Role. If a user is authorized to edit, will be able to edit. Other users can not.
		Clarification only, no change required
8-23	EP-1.0 B6: What is meant by this	The requirement relates to having an employee deleted from the system with no corresponding records. Such as if an employee is added mistakenly can be deleted
		Clarification only, no change required
8-23	EP-4.0 B1: Needs to be reviewed; Fingerprint	AD integration would eliminate to maintain login Employee's ID and Password in OTES
		Supervisors are allowed access to all the Groups
		Requirement modified, see EP-4.0 in section 8.0 "Employee Profile"
		Identifications based upon fingerprint is a future requirement
9-25	RO-1.0 B1: Log into – No log in, authenticate thru Active Directory	Discussed, auto logins are much more complex to implement in web based applications.
	Use URL – no timeout	Therefore agreed to have user enter login ID and password. Timeout will apply.
0.25	DO 1 0 D7, 1St .1 111 2Id	No change in the requirement
9-25	RO-1.0 B7: 1 <sup>st</sup> should be 3 <sup>rd</sup>	Requirement modified, see RO- 1.0 in section 9.0 "Record Overtime"





10.21	T 41:	III 1 . cm 1	
10-31	Is this a report	UI screenshot of Task Assignment. This is an online view of task assignment	
		Clarification only, no change required	
12-33	MET-1.0 B4: Assigned manually by an authorized user	Sentence changed to clarify the requirement.	
		Requirement modified, see MET- 1.0 in section 12.0 "Move Employee Temporarily into a Temporary Group"	
12-33	Need MET-1.0A and MET-1.0B	Requirement modified, see MET-1.0A and MET-1.0B in section	
	MET-1.0A: Move Group – Retained in the old Group – Move on Paper (Employee – same group, same shift, as if he had never moved) Example – retained to train replacement	12.0 "Move Employee Temporarily into a Temporary Group"	
	MET-1.0B: Move employee to a temporary group – different from official group		
	Employee is slotted as bottom of the list – showing hours from primary group		
	Highlight in color – as a temporary ass to the group		
	Authorized user must be able to update person with average hours and resort based on 20 hours in group rule		
12-34	MET-1.0 should be MET-2.0	Typo corrected	
13.36	AVG-2.0 B1: Remain in OTES list for 28 calendar days.	Requirement modified, see AVG-2.0 in section 13.0 "Average	
	Include the 1 <sup>st</sup> day – versus 28 days from Status Eff Date	Hours Calculation"	
14-37	AOR-1.0 B2: Allow administrator to set Reset Time as well	Requirement modified, AOR-1.0 & AOR-2.0 in section 14.0 "Annual Overtime Reset"	
14-37	AOR-1.0 B3: Concern – Employees in the temp groups at the time of Reset	Requirement modified with governing rules. See AOR-1.0 in section 14.0 "Annual Overtime Reset"	





15-39	Not Required	As discussed, decided to keep the requirement with modification.
		Requirement modified, see RX-
		1.0 in section 15.0 "Ranking
		Exclusion Periods"
20-0	Add Glossary Terms	Terms added, definitions to be
		defined
Other	Hours entered for a day in early and after shifts may overlap into previous or next days, the hours remain attached the day for which the OT is recorded.	Clarification only, no change required
Other	The visual must show "No Call" column	Visual to be updated





# 20.0 Glossary of Terms

Term	Definition
Department	
Job Code	
Shift	
Foreman	
Lowman	
High man	
Group	
CSV	
Company	
Primary OTES Group	
Official OTES Group	
Secondary OTES Group	
Temporary OTES Group	