**Example Requirements List**

Identify which requirements have high, medium, or low value to your business. Add any additional requirements you may have.

|  |  |  |  |
| --- | --- | --- | --- |
| Requirement | Value | | |
| High | Medium | Low |
| Time Entry |  |  |  |
| Possible to enter time against unplanned activities |  |  |  |
| Internal activity defaults to non-charge |  |  |  |
| Automated timesheet approval process |  |  |  |
| Automated timesheet reminders |  |  |  |
| Holiday submissions approval process |  |  |  |
| Resource Planning |  |  |  |
| View individual’s capacity by day, week, month, or quarter |  |  |  |
| Search for individuals based on grade, skill, name, or job title |  |  |  |
| View resource plans at a Team and/or Project level |  |  |  |
| Report consultant availability by location, rate, and time |  |  |  |
| Report consultant availability by capability |  |  |  |
| Ability to associate consultant skills with projects |  |  |  |
| Report of total capacity |  |  |  |
| Report of available capacity |  |  |  |
| Search for available capacity by resource function, grade, or skill set |  |  |  |
| Report of demand for skills, function or grade vs. current capacity |  |  |  |
| Client & Project Management |  |  |  |
| Add new projects and codes |  |  |  |
| View by project of planned consultants and rates |  |  |  |
| Scheduling of planned time for projects in hours |  |  |  |
| Approval process for entered time |  |  |  |
| Role-based editing rules |  |  |  |
| Ability to enter plan clashes for later revision |  |  |  |
| View bookings by project, time, and resource |  |  |  |
| HR and New Joiners |  |  |  |
| Set line managers for each consultant |  |  |  |
| Set cost rate on individual basis |  |  |  |
| Set hours per week on individual basis |  |  |  |
| Set holiday entitlement on individual basis |  |  |  |
| Leave – Holidays and Sickness |  |  |  |
| Formal holiday authorisation process |  |  |  |
| Ability to allocate compensatory holiday days |  |  |  |
| View of sick days by individual and time period |  |  |  |
| Project and Client Profitability |  |  |  |
| Profitability planned vs. actual for time & materials projects |  |  |  |
| Profitability on fixed price projects: forecast and current margin |  |  |  |
| Client profitability by billed and non-billed time |  |  |  |
| Profitability by individual: most to least profitable |  |  |  |
| Financial Reports |  |  |  |
| Unbilled time by month |  |  |  |
| Report and analyse income by project, with detail drill |  |  |  |
| Revenue/income reporting by individual, project, department, client |  |  |  |
| Revenue/income variances per project and individual |  |  |  |
| Client portfolio view of all projects/income and status |  |  |  |
| Planned revenue vs. actual revenue (T&M): individual and project |  |  |  |
| Summary of resources generating most to least income |  |  |  |
| Reporting |  |  |  |
| Summary of time entered by day, week, month |  |  |  |
| Summary of expenses entered by day, week month |  |  |  |
| Summary of time and costs entered against projects |  |  |  |
| Summary of project margins across time ranges |  |  |  |
| Revenue against project by project, time, and client |  |  |  |
| Overall revenue by project, time, and client |  |  |  |
| Plan clash report |  |  |  |
| Real-time, visual, exportable reports |  |  |  |
| Technology/User Requirements |  |  |  |
| Browser-based information entry |  |  |  |
| Time entry on mobile device |  |  |  |
| Easy to generate and share reports |  |  |  |
| Easy and simple timesheet submission |  |  |  |
| Integration/API possibilities |  |  |  |