Time Tracking Functional Documentation

Description

Time Tracking is used to record the hours on which each employee has dedicated his time.

The time will be divided in hours throughout the day and in different projects.

Having different types of users, some hours will have to be reviewed for their managers.

Finally, it generates a report that will be used to match the contractor’s hours with his provider.

Projects distribution

As we said before, the hours will be charged to a specific project. Each project can belong to a program.

When a project is created, a manager will be assigned to it. After that, this manager will be able to add new users to this project making a bigger team or remove them if necessary.

Each employee will only have visibility on the projects to which he is assigned.

Users distribution

There are different types of roles: **current user** that are the contractors; **managers** that are the Zurich employees who have a team and will have to check the hours of all the team components they supervise; **administrator**, the ones who have access to some extra features and finally a combination of these two last: **manager-administrator**.

Each user belongs either to Zurich or to a provider. When a new user is created, the provider will have to be defined. In the same way, new providers can be added.

Hours Distribution

When we have to register the hours, a period for each user and week will be created having the date as a reference. Inside every period (week) we can have as many entries as we want. Every entry will have a project related to it and the number of hours per day.

So, every new week will imply the creation of a new entry in the table Period with a foreign key of that user and a date of the first day of that week. Then, for very project in this week, a new entry in the table Register will be created with the ID of the period as a foreign key, and for every day will be assigned the number of hours.

Views

The idea of this section is to define the different views that the tool has. Quickly it is composed for the **User Info** view where shows the projects where the user is assigned; the **Record Time** view where the users impute the hours; the **Approve Time per Month** (only visible to managers) where is possible to have a look to the hours of all the team and approve them; the **Approve Time per Week** (only visible to managers too) where like the last one they can see the hours of their team and approve or reject them; the **Monthly Summary** where shows an overview of all the hours, and finally the **Administration** view from where only the administrators can manage different subjects.

User Info

Here, like in all the views there are some differences depends on the role of the user who access to it. For a regular user only will be shown a table with the projects he is assigned to.

For the managers, further the projects table that shows in which projects are they as managers, there is a table that shows the employees they have in their teams. Here they can add new people and remove them. The same way, they can associate the users to some other projects.

**The managers can only see the projects which they are in. If they are going to start new projects, they are not allowed to link themselves to these projects, has to be the administrator who when creates the new project associates the manager to it, then, the manager will see it and add new people to these team.*

For every user they can see different columns as the name, the Input Ratio that shows the ratio of days each user has completed for the current month; optionally an alert image that means that that employee has some hours still pending to review; the provider which belongs and a link to manger the projects related to that specific user.

If they click in the user's name, they will go to a new page where they will see the projects on that user is assigned.

Record Time

This is where the hours are registered. For each week the user has to select one or multiple projects and put the hours per day that have been dedicated on it. The hours can be a fraction, and for the same day, a user can impute in different projects.

If the employee who fill in the hours is a current user, these hours will be in a pending status until his manager approve or reject them. In the other hand, if is the manager who imputed the hours, automatically will be in approved status.

A manager can either save his hours and his team hours.

Also, there is a text area where can write any comment to inform to the manager or to the user.

**So, the mainstream could be like follows: a user completes one week and save them. He will have to the approval. Then, to his manager, will show the alert image in the User Info view warning that that user has some hours to review. Clicking on that icon, will be redirect to that specific week of this user. There will see the projects and the hours that has dedicated to every project and if were, the comments too. If he decides that everything is fine will approve them, otherwise will reject them optionally with a comment in the open window.*

*The user, after that, will see an image in the right side of the calendar bar on the top of the Record Time view: this icon will be a **red cross** if were rejected or a **green check** if approved. If the hours were rejected, he saw the comment and could modify the hours properly.*

In addition to these two icons there may be 2 more, related with some of last updates to the tool: an **orange check icon** when some period (week) is split in two different months, the week related to the first month has been already approved and over the days belonging to the next month have been modified by the user and not approved yet.

The same way, to the **orange cross icon**, the same as the before one, but when the second part of the week has been rejected and the first was approved.

Approve Time per Week

Here the manager (they are the only ones with the administrator manager who can see it) will have to approve the hours of his team. If everything is correct, he will approve that week. The other way he will have to reject them and then the user will have to correct it and the manager check it again. After click on the reject button, a message will be displayed and some comments could be added.

Approve Time per Month

It’s something similar to the previous one but all the month will be approved in on click.

At a glance it’s possible to see all the hours week after week. For those weeks that are split between 2 months, the days belonging to the previous or to the next month will be in a grey colour.

At the bottom of this table appears a sum of total hours and other sum of total days. For the first one, the sum only will count the days that have some hours related to some chargeable projects (the hours impute to non-chargeable projects). And the sum of days is the result of Monday to Friday days in the current month, although in some parts the employees impute on weekends.

Monthly Summary

This view is like the last one but can be accessed by all the users. The only difference here is that it’s not possible to approve the entire month but instead generate a report of the hours.

This report will depend on which type of user is. For the current users, it will generate a report with their hours, but for managers, all his team will appear in the excel report.

Before generating the report, users can select the dates ranges of the hours they can see.

Administration

From here the managers can do some different actions related to the tool.

These can be separate in 3 different blocks: basic actions, reports and extra features.

Inside the basic elements there are the functionalities related to create or update Programs, Projects, Providers or Users. For each of these options a new window will be opened and from there the admin will have to fill in some fields.

In the second block are the options related to the generation of the reports. There is the option to generate a personal report, a team report or all users report. In each case the dates can be selected.

Finally, there are two options: one is to send a reminder mail to all the users to complete or approve their hours, and the second one, is to close some months. After one month is closed, that month won’t be able to be modified. Eventually the admin can reopen it again to make some changes by the user or manager.

Data Base tables

The following diagram shows the different tables that are involved in the application: