Code3 Custom Web App Requirements

Admin Setup Elements

Add new User

- Employee
  - Name
  - Title
  - Employee ID (if no ID “Contractor)?
  - Email
  - Team
  - Line of Business
  - Manager
  - Role/Profile (Employee vs Admin vs Manager) 1:1 relationship

Create Line Of Business

- Multiple teams under each Line of Business
- Used for associating a user
- Examples
  - LOB = Media
    - Team = Social, Programmatic, Search etc

Create Teams

- This will be used to associate a user with. 1:1 relationship with user

Roles / Profiles (Decides the permissions within the tool)

- Admin, Employee, Manager

Client

  - Client - Parent company (tagging which Teams have ability to use this)
  - Brand - brand under the parent company (tagging which Teams have ability to use this)
  - AM Owner (Related to User)

Enter Client Actual Monthly Revenue

- Only Admins can enter actual monthly revenues at the Brand level

Task

- Create a database of tasks that's specific to Teams

Average Hourly Expense

- By Title, enter the average hourly comp

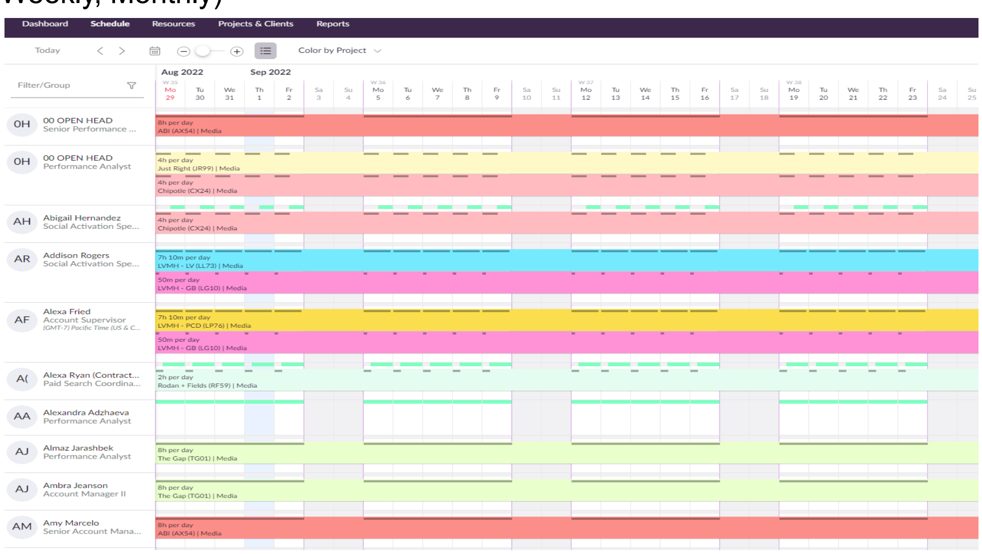
- Ability to Archive Employees and Clients (if an employee terms or client terms, removing them from the ability to select in dropdown menus, but still part of historical data reporting)

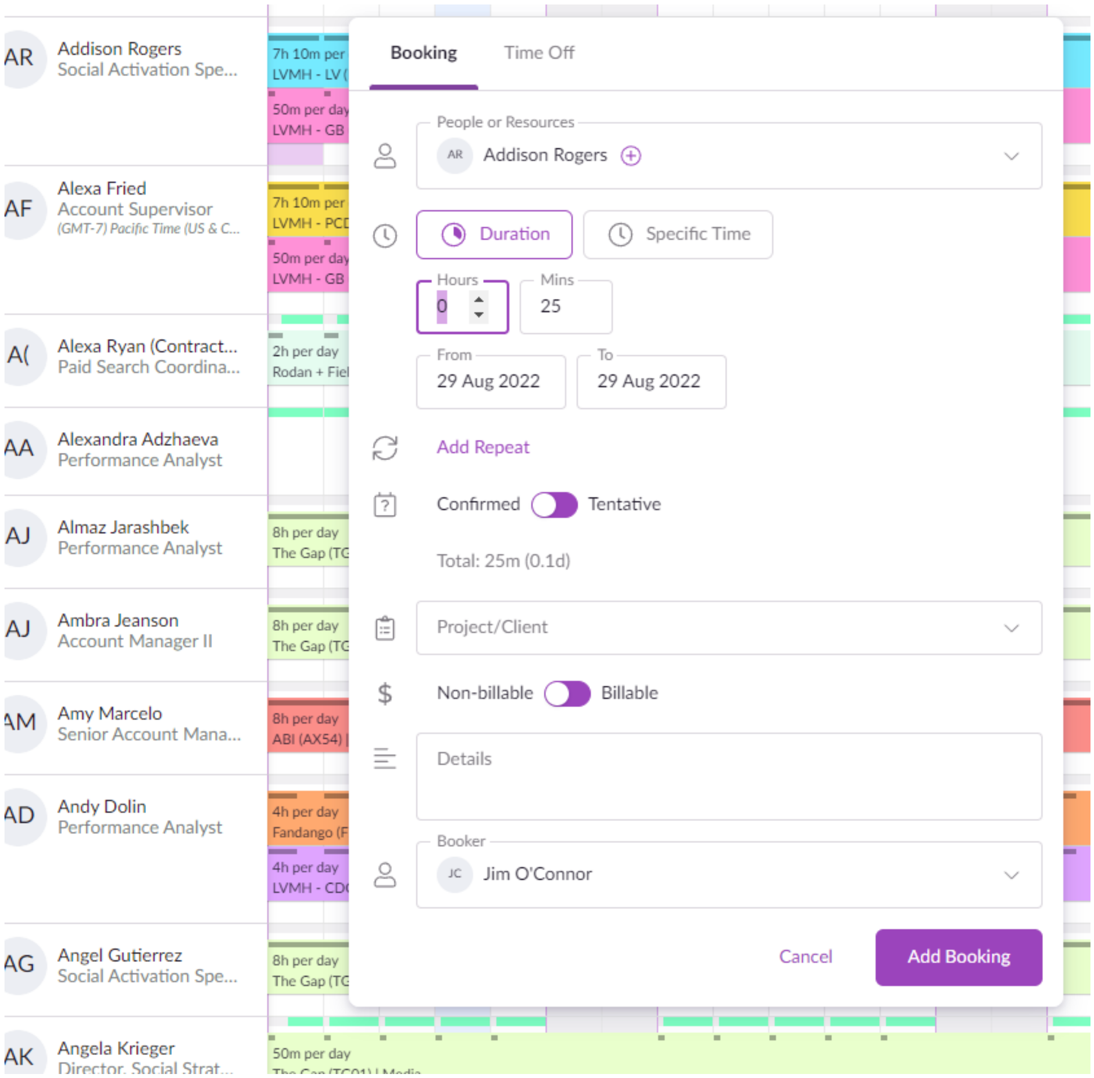
Hour Tracking

Data Entry Needs

- Daily hours
  - Brand (drop down)
  - Client (auto-populated based on Brand)
  - Task (dropdown)
  - Description (free form)
  - Hours (Time) (hour & minutes)
  - Time Recorder? (existing toggle feature)
  - Daily, Weekly & List view to log hours

Resource Forecasting

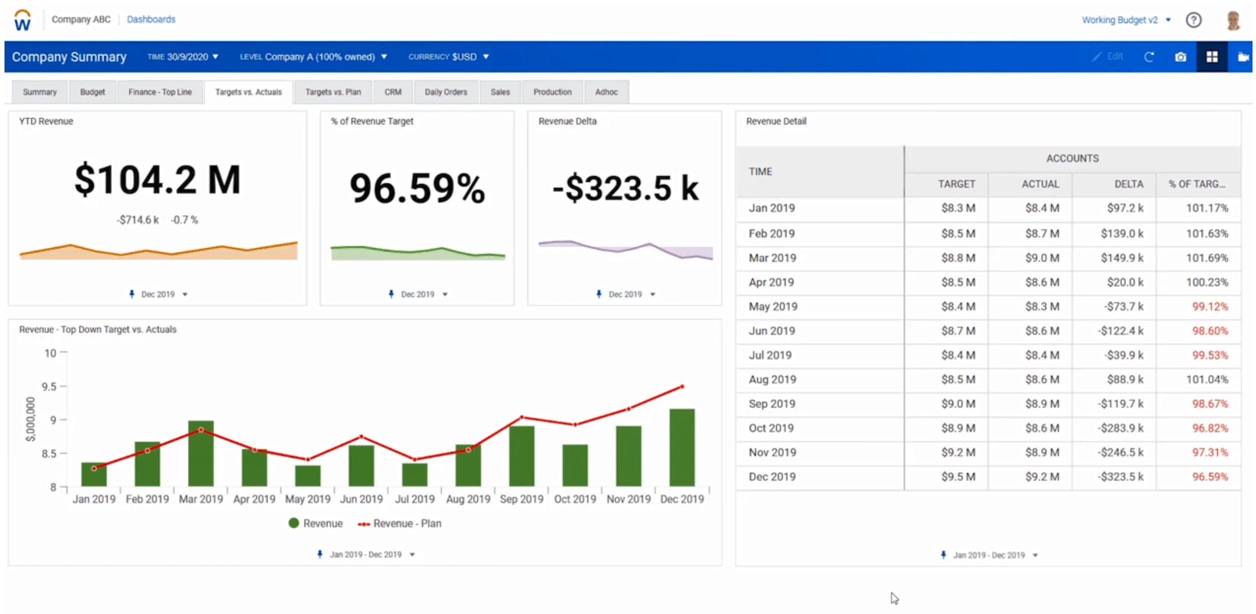
- Entered at the Employee level. How many hours they will working on which client (Daily, Weekly, Monthly)
- 

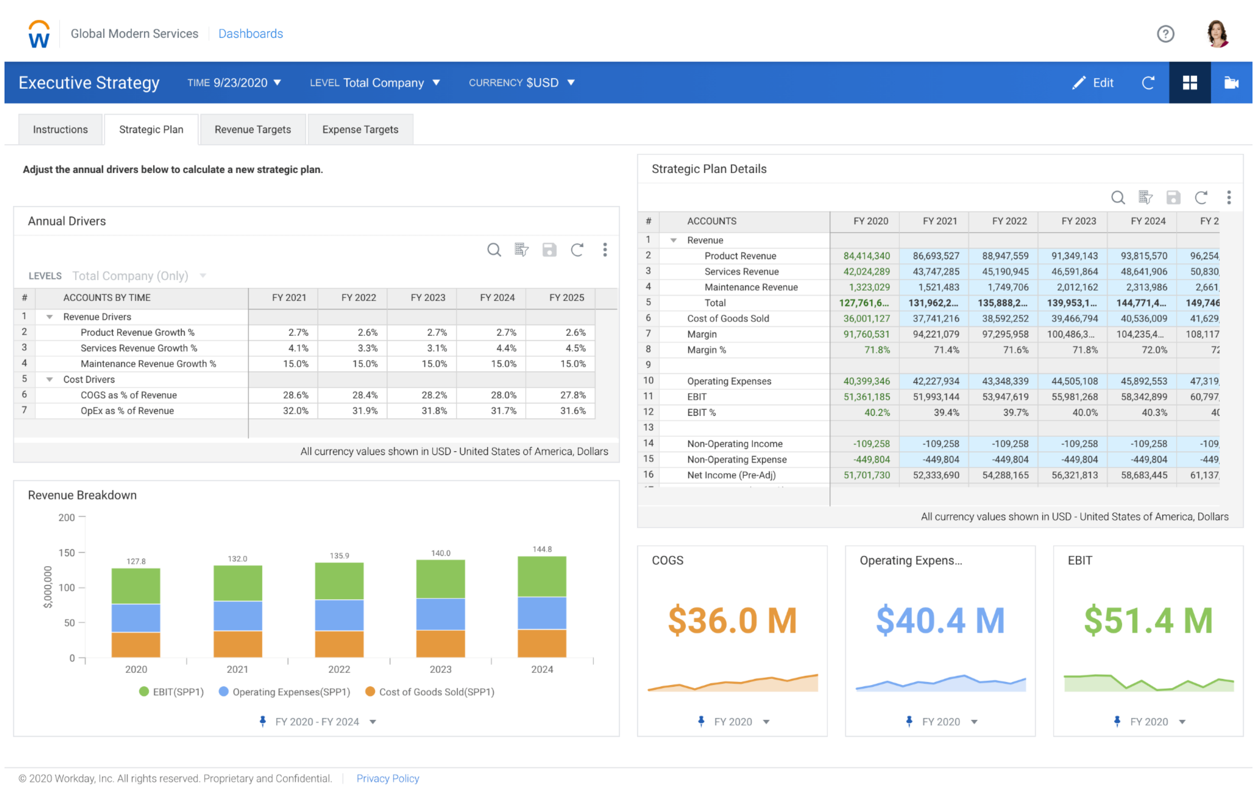


Client Revenue Forecasting

- Entered at the Brand level
    - Estimated Monthly revenue entered by the users
    - Simplest possible way to enter forecast
    - One example could be - click on the client they are assigned to and a table populates on the side with forecasting data. If it is blank then they can easily enter it or edit the existing forecasting data

Data entry and dashboarding similar to what's below





Reporting Needs / Alerts

- Automatic
    - Monthly Reports sent to Managers automatically showing # of hours employee has and on what account, by task and description
        - Ensure that if someone has 0 hours, they show up in reporting as having 0 hours entered and are not excluded because they have 0 hours
    - Monthly Reports sent to AM Owner of all employees allocating time on their account, by task description and team
    - Monthly Reports sent to Finance & Resourcing showing total time entered for that prior month, by employee, client, team, task, description
    - Monthly Reports showing Billability Calculations by Person and Level to Finance & Resourcing
- Ad hoc
    - Availability, using resource forecasting showing hours assigned per person

Reminder Needs

- Weekly reminders sent (on Monday) to everyone logging fewer than 40 hours in prior week
    - Secondary reminder on Wednesday for fewer than 40 hours in prior week
    - Third reminder on Thursday for fewer than 40 hours in prior week
- Email notification sent to manager the week following

Dashboard

- Forecasted Resourcing
    - Filter by Client, Team, Employee and show hours on account for forecasted periods
    - Summary Dashboard
        - What do I want to show here? Elaborate on flexibility in what's seen (things at brand level, lob level etc.)

Questions to think about

- Is the Time Zone needed in any format?

Nice to have

- Google Calendar Integration?
- Google SSO (Gmail) ?