Requirements Documentation Sign-off
HydroChem Remote System 2.0

Prepared for:
Joe Hartman

July 16, 2009

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Sign-off Information

Introduction

July 16, 2009

HydroChem Industrial Services, Inc.
900 Georgia Ave
Deer Park, TX 77536

Attention: Joe Hartman

Attached to this document and included as part of it are three (3) additional documents as follows:

- **FUNCTIONAL PUNCH LIST:** HydroChem-Intellinet RS2.0 - FINAL MASTER - Functional Requirements Punch List (2009-07-16).PDF
- <PDF document has a date of 2009-07-16>
  - The **Functional Punchlist** spreadsheet defines the agreed-upon business requirements for the Remote System 2.0 Branch Administration solution, and will be the primary document for determining what is and is not within the scope of what will be delivered.

- **NON-FUNCTIONAL PUNCH LIST:** HydroChem-Intellinet RS2.0 - FINAL MASTER - Non-Functional Punch List (2009-07-16).PDF
  <PDF document has a date of 2009-07-16>
  - The **Non-Functional Punchlist** is a supplementary document to the Functional Punchlist, and provides Definitions, Milestones, Acceptance Criteria, Project Logistics, Reporting / Data Warehousing requirements, Other Non-Functional Requirements, Functional Quality Assurance assumptions, Performance and Concurrency assumptions, Training, Documentation and Deployment assumptions, Hardware and Software requirements.

- **WIRE FRAME PUNCH LIST:** HydroChem-Intellinet RS2.0 - FINAL MASTER - Wire Frames (2009-07-16).PDF
- <PDF document has a date of 2009-07-16>
  - The **Wireframe Punchlist** is a supplementary document to the Functional Punchlist and describes the envisioned user experience for the Remote System 2.0 Branch Administration solution. The delivered solution may deviate from the Wireframe Punchlist, due to limitations of the technology being used, or if Intellinet identifies design improvements which better comply with the requirements as defined in the Functional Punchlist.

These documents form the full set of requirements for the completion of the Remote System 2 project. Our signatures below indicate that both parties have reviewed these requirements and agree that they constitute the full definition of what defines "successful completion".

Signatures for Approval

In witness whereof, HydroChem and Intellinet approve these requirements as stated in the above documents.

*Accepted and approved for **HydroChem** by:*

Signature

Joe Hartman
Name

IT Manager
Title

7/17/09
Date of Acceptance

*Accepted and approved for **Intellinet** by:*

Signature

Juan DeJesús
Name

Project Manager
Title

7/17/09
Date of Acceptance

If you have any questions, please feel free to call Mark Seeley at 404.442.8507 or Juan DeJesús at 936.232.1650.

Category	Est. Catg.	Date Added	Req#	Requirement	In Scope	Req Type	Role	Notes / Assumptions
Administration > Branch Contractors	ADM	7/7/2009	445	Prevent the user from saving a Branch Contractor with an Employee Number that is already used by an Employee or by another Branch Contractor.	Y	3 - BR		Preceed the number with "C"
Administration > Branch Contractors	ADM	7/7/2009	476	List Branch Contractors, including First Name, Last Name, Unique Employee Number, and Employment Service.	Y	1 - LIST	D	Though Branch Contractors are maintained at the Branch, Badge Numbers for Branch Contractors -- and for Employees -- will be maintained at the corporate office, and are outside of our scope.
Administration > Branch Contractors	ADM	7/7/2009	477	Sort the Branch Contractors by Last Name, First Name	Y	3 - BR		
Administration > Branch Contractors	ADM	7/7/2009	478	Allow a user to Filter the Branch Contractors by All or Active Only. Default to Active Only.	Y	2 - UA	D	
Administration > Branch Contractors	ADM	7/7/2009	479	Allow a user to access a Branch Contractor from the list.	Y	2 - UA	D	
Administration > Branch Contractors	ADM	7/7/2009	480	Allow a user to create a new Branch Contractor.	Y	2 - UA	D	
Administration > Branch Contractors	ADM	7/7/2009	481	Allow a user to edit a Branch Contractor.	Y	2 - UA	D	
Administration > Branch Contractors	ADM	7/7/2009	482	Prevent the user from saving a Branch Contractor without a First Name, Last Name, Employee Number, or specified Employment Service.	Y	3 - BR		
Administration > Branch Contractors	ADM	7/7/2009	483	Allow a user to terminate/un-terminate a Branch Contractor.	Y	2 - UA	D	
Administration > Customer Gate Log Reconciliations	ADM		7	List Labor records for a selected day for a selected Customer Site, displaying the Badge Number, First Name, Last Name, Employee Number (if it exists)and Start/Stop date/time (according to the Shift Summary), total hours/minutes worked, the Employee's Home Branch, Customer Area, Shift Summary Number, and Job Number.	Y	1 - LIST	DI	HydroChem has indicated that this is in scope, but might not be needed for a beta release.
Administration > Customer Gate Log Reconciliations	ADM		8	List Primary Equipment records for a Shift, displaying the Customer's Equipment Number, and Start/Stop date/time (according to the Shift Summary) sorted by Equipment Number.	N	1 - LIST	DI	Removed from scope. Primary Equipment is not subject to Gate Log Reconciliations.
Administration > Customer Gate Log Reconciliations	ADM		9	Allow a user to accept the default calculated Labor time (per the Shift Summary), or enter the Gate Log Labor time (in minutes, hours), per line.	Y	2 - UA	DI	HydroChem has indicated that this is in scope, but might not be needed for a beta release.
Administration > Customer Gate Log Reconciliations	ADM		10	Allow a user to enter or change the Gate Log data for that Equipment for that shift.	N	2 - UA	DI	Removed from scope. Primary Equipment is not subject to Gate Log Reconciliations.
Administration > Customer Gate Log Reconciliations	ADM		11	Allow a user to save the Gate Log data for a shift.	Y	2 - UA	DI	HydroChem has indicated that this is in scope, but might not be needed for a beta release.
Administration > Customer Gate Log Reconciliations	ADM	7/7/2009	357	Sort the Gate Log Reconciliation records by Last Name (ascending), and First Name (ascending).	Y	3 - BR		HydroChem has indicated that this is in scope, but might not be needed for a beta release.
Administration > Customer Gate Log Reconciliations	ADM	7/7/2009	358	Filter the Gate Log Reconciliation records by the selected Customer Site, by all Shift Labor records that begin on the selected date.	Y	3 - BR		HydroChem has indicated that this is in scope, but might not be needed for a beta release.
Administration > Customer Gate Log Reconciliations	ADM	7/7/2009	359	Display summary duration values for each person (i.e., Badge Number).	Y	3 - BR		HydroChem has indicated that this is in scope, but might not be needed for a beta release.
Administration > Customer Gate Log Reconciliations	ADM	7/7/2009	360	Prevent a user from editing a Gate Log record if the corresponding item exists on an Invoice (unless the Invoice has been credited and the item has not been reinvoiced).	Y	3 - BR		HydroChem has indicated that this is in scope, but might not be needed for a beta release.
Administration > Customer Gate Log Reconciliations	ADM	7/7/2009	361	Warn the user, when reopening a Shift Summary with Gate Log Reconciliations, that the Gate Log Reconciliations will be deleted.	Y	3 - BR		HydroChem has indicated that this is in scope, but might not be needed for a beta release.

Category	Est. Catg.	Date Added	Req#	Requirement	In Scope	Req Type	Role	Notes / Assumptions
Administration > Customer Gate Log Reconciliations	ADM	7/7/2009	362	When a user reopens a Shift Summary with Gate Log Reconciliations, delete the Gate Log Reconciliations associated with the Shift Summary.	Y	3 - BR		HydroChem has indicated that this is in scope, but might not be needed for a beta release.
Administration > Customer Purchase Orders	ADM		12	Calculate and display the difference between the original amount of the Purchase Order or Purchase Order Line, and the amount of the Invoices posted against it.	Y	3 - BR		
Administration > Customer Purchase Orders	ADM		13	Sort the Purchase Orders by Purchase Order Number (ascending).	Y	3 - BR		
Administration > Customer Purchase Orders	ADM		14	Allow a user to filter the Purchase Orders (Open vs. Closed). Initialize the filter to display Open only.	Y	2 - UA	DI	
Administration > Customer Purchase Orders	ADM		15	Filter the Purchase Orders by Customer Site.	Y	3 - BR		
Administration > Customer Purchase Orders	ADM		16	Allow a user to deactivate a Purchase Order.	N	2 - UA	DI	Removed from scope. Purchase Orders can be closed, but there is no business requirement to deactivate a Purchase Order.
Administration > Customer Purchase Orders	ADM		17	List Purchase Orders.	Y	1 - LIST	DI	References to a "Purchase Order" here refer to a Purchase Order record, which only exists at one Branch. The same Purchase Order may be represented as a record at more than one Branch.
Administration > Customer Purchase Orders	ADM		19	Prevent the user from deactivating a Purchase Order if it exists on a Job Header or Invoice.	N	3 - BR		Removed from scope. Purchase Orders can be closed, but there is no business requirement to deactivate a Purchase Order.
Administration > Customer Purchase Orders	ADM		20	Prevent the user from closing a Purchase Order if one of its Purchase Order Lines exists on an unposted Invoice.	Y	3 - BR		
Administration > Customer Purchase Orders	ADM		21	Allow a user to close a Purchase Order.	Y	2 - UA	DI	
Administration > Customer Purchase Orders	ADM		22	Allow a user to select a Purchase Order	Y	2 - UA	DI	
Administration > Customer Purchase Orders	ADM		23	Allow a user to create a Purchase Order	Y	2 - UA	DI	
Administration > Customer Purchase Orders	ADM		24	Allow a user to edit a Purchase Order	Y	2 - UA	DI	
Administration > Customer Purchase Orders	ADM		25	Prevent the user from saving a Purchase Order with a Purchase Order Number that already exists for the Customer Site.	Y	3 - BR		
Administration > Customer Purchase Orders	ADM		26	Warn the user when saving the Purchase Order with a Purchase Order Number that does not pass the Purchase Order regular expression mask for the Customer Site, if one exists.	Y	3 - BR		
Administration > Customer Purchase Orders	ADM	6/22/2009	363	Allow a user to reopen a Purchase Order.	Y	2 - UA	DI	
Administration > Customer Purchase Orders	ADM	7/7/2009	364	Calculate and display the difference between the original amount of the Purchase Order or Purchase Order Line, and the amount of the unposted and posted Invoices against it.	Y	3 - BR		
Administration > Customer Purchase Orders	ADM	7/7/2009	365	Prevent the user from editing a closed Purchase Order, or a Purchase Order Line of a closed Purchase Order.	Y	3 - BR		
Administration > Customer Purchase Orders	ADM	7/7/2009	366	Prevent the user from saving a Purchase Order Line that already exists for the Customer Site.	Y	3 - BR		
Administration > Customer Purchase Orders	ADM	7/7/2009	367	Sort the Purchase Order Lines by Purchase Order Line Number (ascending).	Y	3 - BR		

Category	Est. Catg.	Date Added	Req#	Requirement	In Scope	Req Type	Role	Notes / Assumptions
Administration > Customer Purchase Orders	ADM	7/7/2009	370	Prevent the user from editing anything other than the Dollar Amount of a Purchase Order, if the Purchase Order has been used on a Posted Invoice.	Y	3 - BR		
Administration > Customer Purchase Orders	ADM	7/7/2009	373	If the user changes the Dollar Amount of a Purchase Order, recalculate the remaining values on the Purchase Order.	Y	3 - BR		
Administration > Customer Purchase Orders > Customer-Defined Attributes	ADM		27	For each Purchase Order, Allow a user to enter the values for the Customer-Defined Attributes.	Y	2 - UA	DI	
Administration > Customer Purchase Orders > Customer-Defined Attributes	ADM		28	For each Purchase Order, validate each entered or modified Customer-Defined Attribute against the Customer-Defined Attribute's regular expression mask, if one exists. If the validation fails, warn the user with a visual cue.	Y	3 - BR		
Administration > Customer Purchase Orders > Customer-Defined Attributes	ADM		29	Warn the user when saving a Purchase Order with invalid Customer-Defined Attribute values.	Y	3 - BR		
Administration > Customer Purchase Orders > Purchase Order Lines	ADM		18	List Purchase Order Lines per Purchase Order.	Y	1 - LIST	DI	
Administration > Customer Purchase Orders > Purchase Order Lines	ADM		30	Allow a user to create a new Purchase Order Line for a Purchase Order.	Y	2 - UA	DI	
Administration > Customer Purchase Orders > Purchase Order Lines	ADM		31	Allow a user to edit a Purchase Order Line for a Purchase Order.	Y	2 - UA	DI	
Administration > Customer Purchase Orders > Purchase Order Lines	ADM	7/7/2009	368	Prevent the user from creating a Purchase Order Line for a Purchase Order, if the Purchase Order is closed.	Y	3 - BR		
Administration > Customer Purchase Orders > Purchase Order Lines	ADM	7/7/2009	369	Prevent the user from creating a Purchase Order Line for a Purchase Order, if the Customer Site does not require Purchase Order Lines.	Y	3 - BR		
Administration > Customer Purchase Orders > Purchase Order Lines	ADM	7/7/2009	371	Prevent the user from editing anything other than the Dollar Amount of a Purchase Order Line, if the Purchase Order Line has been used on a Posted Invoice.	Y	3 - BR		
Administration > Customer Purchase Orders > Purchase Order Lines	ADM	7/7/2009	372	Prevent the user from deleting a Purchase Order Line if the Purchase Order is closed.	Y	3 - BR		
Administration > Customer Purchase Orders > Purchase Order Lines	ADM	7/7/2009	374	If the user changes the Dollar Amount of a Purchase Order Line, recalculate the remaining values on the Purchase Order Line.	Y	3 - BR		
Administration > Customer Purchase Orders > Purchase Order Lines > Customer-Defined Attributes	ADM		32	Allow a user to delete a Purchase Order Line.	Y	2 - UA	DI	
Administration > Customer Purchase Orders > Purchase Order Lines > Customer-Defined Attributes	ADM		33	For each Purchase Order Line, allow a user to enter the values for the Customer-Defined Attributes.	Y	2 - UA	DI	
Administration > Customer Purchase Orders > Purchase Order Lines > Customer-Defined Attributes	ADM		34	For each Purchase Order Line, validate each entered or modified Customer-Defined Attribute against the Customer-Defined Attribute's regular expression mask, if one exists. If the validation fails, warn the user with a visual cue.	Y	3 - BR		

Category	Est. Catg.	Date Added	Req#	Requirement	In Scope	Req Type	Role	Notes / Assumptions
Administration > Customer Purchase Orders > Purchase Order Lines > Customer-Defined Attributes	ADM		35	Warn the user when saving the Purchase Order Line with invalid Customer-Defined Attribute values.	Y	3 - BR		
Administration > Customer Purchase Orders > Purchase Order Lines > Customer-Defined Attributes	ADM		36	Prevent the user from deleting a Purchase Order Line if it exists on an Invoice.	Y	3 - BR		
Administration > Employees	ADM		37	List Employees, including First Name, Last Name, Employee Number, Employee Type (i.e., Regular or Part-Time Professional).	Y	1 - LIST	P	
Administration > Employees	ADM		38	Allow a user to sort Employees by Employee ID (ascending), or by Last Name (ascending)/First Name (ascending), default by Last Name/First Name.	Y	2 - UA	P	
Administration > Employees	ADM		39	Allow a user to filter Employees by Branch, default to the Home Branch.	Y	2 - UA	P	
Administration > Employees	ADM		40	Allow a user to select an Employee.	Y	2 - UA	P	
Administration > Field Service Settings	ADM		41	Notify the user if a clock reset has been detected, and prevent the application from starting until the clock has been set.	Y	3 - BR		We will check to determine if the system date is prior to 1/1/2009.
Administration > Month End Close	ADM		42	Provide real and estimated revenue values for all Shift Items within a month, for all items added in that month, and for all items whose real or estimated revenue has changed within the month; and for a place-holder for a Corporate System to associate a month/year to the value.	Y	3 - BR		Month-End Close will occur at the corporate office. This process will provide the month/year value. In some cases, we will not be able to estimate revenue for an item, e.g., when the price is not specified (third-party charges, items priced on request, items whose contract-specified units of measure do not match those in the Item Master, etc.). Per 7/7/2009 meeting - Still questions on whether an automated close should be done. Requires database work to support close, but UI is out of scope. Allowances based on uncertainty still existing around month-end close - LM.
Administration > Month End Close	ADM		43	Prevent a user from closing Month End prior to Month End.	N	3 - BR		Month End processing will occur at the corporate office, outside of the scope of this project. As such, the user will have no facility for closing Month End.
Administration > Pending Customers	ADM		44	Allow a user to match a Pending Customer Site to an Oracle Customer.	N	2 - UA	DI	This is out of scope. The proper process for resolving a Pending Customer Site is to delete the Job for the Pending Customer Site, recreate a Job for the real Customer Site, and re-enter the Shift information.
Administration > Pending Employees	ADM		45	Allow a user to match a Pending Employee to an Oracle Employee.	Y	2 - UA	DIP	Included in scope here, and will not be done in Payroll or Invoiceing.
Administration > Synchronization	ADM	7/7/2009	343	Display a confirmation message at the end of a successful manual synchronization.	Y	3 - BR		
Administration > Synchronization	ADM	7/7/2009	344	Warn the user to synchronize when the Remote System 2.0 is opened and closed in branch.	Y	3 - BR		
Administration > Synchronization	ADM	7/8/2009	401	Display the synchronization status.	Y	3 - BR		

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Administration > Terms & Conditions Contract	ADM		46	Display Customer Terms & Conditions Contract Details (T&C Contract Number, Activation Date, Expiration Date)	Y	3 - BR		This will appear on the current Customer Administration screen as read-only data.
Administration > Terms & Conditions Contract	ADM		47	Warn the user when creating a new Job when the Terms & Conditions Contract has past its expiration date.	Y	3 - BR		
Administration > Terms & Conditions Contract	ADM		48	Warn the user when creating a Shift for an existing Job when the Terms & Conditions Contract has past its expiration date.	Y	3 - BR		
Invoicing > Contract Selection	ADM		1	List all Contracts for a Customer.	N	1 - LIST	I	This was removed from scope as an independent requirement, since it is incorporated into Requirement #5.
Invoicing > Contract Selection	ADM		2	Allow a user to select a Contract.	N	2 - UA	I	This was removed from scope as an independent requirement, since it is incorporated into Requirement #6.
Invoicing > Contract Selection	ADM		3	Allow a user to view Contract header details (e.g., Contract Number, expiration date, etc.)	N	2 - UA	I	This was removed from scope as an independent requirement, since it is incorporated into Requirement #5.
Invoicing > Contract Selection	ADM		4	Prevent a user from seeing Contract Pricing for a Contract, if the user's Branch is not authorized to view that Contract's Pricing.	N	3 - BR		For this scope, the system will not prevent any user from seeing pricing for any Customer or Contract.
Invoicing > Contract Selection	ADM		5	List all Contracts, Contract Levels, and Contract Level Version for a Customer, displaying the Contract Number, the Contract Level Description, the Contract Version Activation Date, and the Contract Expiration Date.	Y	1 - LIST	I	There will be no UI process for reviewing Contracts or their attributes. Since the Contracts are read-only, this will be handled via one or more reports, which are not included here.
Invoicing > Contract Selection	ADM		6	Allow a user to select a Contract / Contract Level / Contract Version.	Y	2 - UA	I	The user cannot change the Contract / Contract Level / Contract Version once selected. If this needs to be changed, the Invoice should be deleted, and a new Invoice should be created with the correct Contract / Contract Level / Contract Version.
Invoicing > Contract Selection	ADM	7/7/2009	354	Sort the Contract / Contract Level / Contract Versions by Active Date of the Contract (descending), then by Contract Level Priority (ascending), then by Contract Version Active Date (descending).	Y	3 - BR		
Invoicing > Contract Selection	ADM	7/7/2009	355	Filter the Contract / Contract Level / Contract Versions to only show records: (a) for the currently selected Customer Site (i.e., those where the Contract Level applies to no Customer Site or to the current Customer Site) (b) where the Active Date of the Contract and Contract Version are for today or older (c) where the Contract Revision are for currently active Contract Revisions (d) where the active date range of the Contract Version overlaps with at least one of the Jobs/Shifts within the Customer Site / Purchase Authorization method selected in the Inbox Queue.	Y	3 - BR		
Invoicing > Contract Selection	ADM	7/7/2009	356	Allow a user to revise the filtered view, to show older Contracts / Contract Levels / Contract Versions by date range, between today and the specified date.	Y	2 - UA	I	

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Invoicing > Credit Invoices	INV		52	Allow a user to create a Credit Invoice from an Invoice, including an indication of whether the Invoice Line Data: (a) will be returned to the Staging Area, (b) will be deleted, and marked as Lost Revenue, or (c) will be associated with a Re-Invoice.	Y	2 - UA	I	
Invoicing > Credit Invoices	INV		53	If a Credit Invoice is created from an Invoice with a Custom View, automatically create a Custom View Line Items for the Credit Invoice, and set the Description of each to the Description of each Custom View Line Item of the source Invoice, and the Dollar Amount of each to the negative of the Dollar Amount of each Custom View Line Item of the source Invoice.	Y	3 - BR		
Invoicing > Credit Invoices	INV		54	Prevent the user from creating a Credit Invoice from an Invoice, or one or more of the Items on that Invoice, if the source Invoice is a Credit Invoice.	Y	3 - BR		
Invoicing > Credit Invoices	INV		55	Prevent the user from creating a Credit Invoice from an Invoice, or one or more of the Items on that Invoice, if the source Invoice is not in Posted Mode.	Y	3 - BR		
Invoicing > Credit Invoices	INV		56	Allow a user to create a Credit Request associated with the Credit Invoice or Credit/Re-Invoice.	Y	2 - UA	I	
Invoicing > Custom Invoice Views	INV		57	Allow a user to create a Custom View for an Invoice.	Y	2 - UA	I	
Invoicing > Custom Invoice Views	INV		59	Allow a user to delete the Custom View of an Invoice.	Y	2 - UA	I	
Invoicing > Custom Invoice Views	INV		60	Prevent the user from creating a Custom View for an Invoice, when the Invoice already has a Custom View.	Y	3 - BR		
Invoicing > Custom Invoice Views	INV		61	Prevent the user from creating a Custom View for an Invoice, when the Invoice is not in Open Mode.	Y	3 - BR		
Invoicing > Custom Invoice Views	INV		62	When the user creates a Custom View of an Invoice, calculate the Custom View Variance Percentage.	N	3 - BR		Mitigated by Requirements #378 and #440
Invoicing > Custom Invoice Views	INV		63	Prevent the user from deleting a Custom View for an Invoice, when the Invoice does not have a Custom View.	Y	3 - BR		
Invoicing > Custom Invoice Views	INV		64	Prevent the user from deleting the Custom View, when the Invoice is not in Open Mode.	Y	3 - BR		
Invoicing > Custom Invoice Views	INV		65	When the user deletes a Custom View of an Invoice, remove the Variance Line from the Invoice.	N	3 - BR		Mitigated by Requirements #378 and #441
Invoicing > Custom Invoice Views	INV		66	Prevent the user from creating a Custom View for an Invoice, when the Invoice is a Credit Invoice.	Y	3 - BR		When a Credit Invoice is created for an Invoice with a Custom View, the system will create a Custom View for the Credit Invoice, with Custom View Lines with negative amounts of the original Invoice.
Invoicing > Custom Invoice Views	INV		67	Prevent the user from editing the Custom View text, when the Invoice is a Credit Invoice.	Y	3 - BR		
Invoicing > Custom Invoice Views	INV		68	Prevent the user from editing the Invoice Total Amount of the Custom View, when the Invoice is a Credit Invoice.	Y	3 - BR		
Invoicing > Custom Invoice Views	INV		69	Prevent the user from deleting the Custom View, when the Invoice is a Credit Invoice with a Custom View.	Y	3 - BR		
Invoicing > Custom Invoice Views	INV		70	Prevent a user from adding a Custom View Line Item to a Custom View for an Invoice, if the Invoice does not have a Custom View.	Y	3 - BR		
Invoicing > Custom Invoice Views	INV		71	Prevent a user from adding a Custom View Line Item to a Custom View for an Invoice, when the Invoice is not in Open Mode.	Y	3 - BR		

Category	Est. Catg.	Date Added	Req#	Requirement	In Scope	Req Type	Role	Notes / Assumptions
Invoicing > Custom Invoice Views	INV		72	Prevent a user from adding a Custom View Line Item to a Custom View for an Invoice, when the Invoice is a Credit Invoice.	Y	3 - BR		
Invoicing > Custom Invoice Views	INV		73	When the user adds a Custom View Line Item to a Custom View for an Invoice, automatically recalculate the Invoice Total Amount, the underlying Invoice Variance, and the Re-Invoice Difference.	N	3 - BR		Mitigated by Requirements #378 and #442
Invoicing > Custom Invoice Views	INV		75	Prevent a user from editing a Custom View Line Item to a Custom View for an Invoice, when the Invoice is not in Open Mode.	Y	3 - BR		
Invoicing > Custom Invoice Views	INV		76	Prevent a user from editing a Custom View Line Item to a Custom View for an Invoice, when the Invoice is a Credit Invoice.	Y	3 - BR		
Invoicing > Custom Invoice Views	INV		77	When the user edits a Custom View Line Item on a Custom View for an Invoice, automatically recalculate the Invoice Total Amount, the underlying Invoice Variance, and the Re-Invoice Difference.	N	3 - BR		Mitigated by Requirements #378 and #443
Invoicing > Custom Invoice Views	INV		79	Prevent a user from deleting a Custom View Line Item to a Custom View for an Invoice, when the Invoice is not in Open Mode.	Y	3 - BR		
Invoicing > Custom Invoice Views	INV		80	Prevent a user from deleting a Custom View Line Item to a Custom View for an Invoice, when the Invoice is a Credit Invoice.	Y	3 - BR		
Invoicing > Custom Invoice Views	INV		81	When the user deletes a Custom View Line Item from a Custom View for an Invoice, automatically recalculate the Invoice Total Amount, the underlying Invoice Variance, and the Re-Invoice Difference.	N	3 - BR		Mitigated by Requirements #378 and #444
Invoicing > Custom Invoice Views	INV	7/7/2009	347	Calculate the Custom View Variance Percentage as: (A) The sum of all Custom View Invoice Lines, divided by (B) the price of all items on the Reference Invoice, according to the highest priority current Contract Pricing Level with specified pricing (i.e., not Branch Standard Pricing)	Y	3 - BR		If the Reference Invoice amount is $0, the amount will be considered "N/A".
Invoicing > Custom Invoice Views	INV	7/7/2009	378	When an Invoice with a Custom View is opened or saved, automatically recalculate the Reference Invoice Total Amount and the Custom View Total Amount, and recalculate and reallocate the Custom Variance across the Reference Invoice Items.	Y	3 - BR		The Custom Variance calculation is represented in Requirement #347.
Invoicing > Custom Invoice Views	INV	7/7/2009	440	When the user creates a Custom View of an Invoice, save the Invoice.	Y	3 - BR		
Invoicing > Custom Invoice Views	INV	7/7/2009	441	When the user deletes a Custom View of an Invoice, save the Invoice.	Y	3 - BR		
Invoicing > Custom Invoice Views	INV	7/7/2009	442	When the user adds a Custom View Line Item to a Custom View for an Invoice, save the Invoice.	Y	3 - BR		
Invoicing > Custom Invoice Views	INV	7/7/2009	443	When the user edits a Custom View Line Item to a Custom View for an Invoice, save the Invoice.	Y	3 - BR		
Invoicing > Custom Invoice Views	INV	7/7/2009	444	When the user deletes a Custom View Line Item from a Custom View for an Invoice, save the Invoice.	Y	3 - BR		
Invoicing > Custom Invoice Views > Line Items	INV		58	Allow a user to add a Custom View Line Item.	Y	2 - UA	I	
Invoicing > Custom Invoice Views > Line Items	INV		74	Allow a user to edit a Custom View Line Item.	Y	2 - UA	I	

Category	Est. Catg.	Date Added	Req#	Requirement	In Scope	Req Type	Role	Notes / Assumptions
Invoicing > Custom Invoice Views > Line Items	INV		78	Allow a user to delete a Custom View Line Item.	Y	2 - UA	I	
Invoicing > Inbox Queue	INV		82	List all Jobs which have uninvoiced items [Inbox Queue]. Display each Customer Site by Payment Authorization.	Y	1 - LIST	I	The term "uninvoiced items" here refers to items that are not on an Invoice, as well as items that were once on a Posted Invoice, but where the Invoice was Credited, and its items returned to the Staging Area.
Invoicing > Inbox Queue	INV		83	Sort the Jobs in the Inbox Queue in ascending order by Customer Number, then by ascending chronological order according to the Job Start Date.	Y	3 - BR		
Invoicing > Inbox Queue	INV		84	Allow a user to filter the Jobs in the Inbox Queue by Keyword search (on Customer Site), Job Start Date (within a specified date range), or Customer Site Number.	Y	2 - UA	I	
Invoicing > Inbox Queue	INV		85	Allow a user to open an Invoice Staging Area for a Customer Site/Purchase Order in the Inbox Queue.	Y	2 - UA	I	
Invoicing > Invoice Formatting and Printing	INV		86	Allow a user to print the Invoice.	Y	2 - UA	I	This assumes four Invoice formats, plus one Custom View Invoice format. Invoice report designs will be provided by HydroChem.
Invoicing > Invoice Formatting and Printing	INV		87	Allow a user to save the Invoice as a PDF.	Y	2 - UA	I	
Invoicing > Invoice Formatting and Printing	INV		88	Apply a watermark (e.g., "NOT AN INVOICE -- DO NOT PAY") to an Invoice when it is not in Posted Mode.	Y	3 - BR		
Invoicing > Invoice Formatting and Printing	INV	7/7/2009	376	Allow a user to preview an Invoice prior to printing.	Y	2 - UA	I	
Invoicing > Invoice Formatting and Printing > Invoice Print Preferences	INV		89	Allow a user to select the Invoice Template for an Invoice.	Y	2 - UA	I	
Invoicing > Invoice Formatting and Printing > Invoice Print Preferences	INV		90	Retain the last used Invoice Template selection for an Invoice.	N	3 - BR		Removed from scope, as this was considered to be a Nice-to-Have feature.
Invoicing > Invoice Header	INV		91	For each new (Open) Regular Invoice, generate a unique, unbroken-sequential Invoice Number (i.e., unique to the Branch location where it is created).	Y	3 - BR		
Invoicing > Invoice Header	INV		92	For each new (Open) Credit Invoice, generate a unique, unbroken-sequential Invoice Number (i.e., unique to the Source Invoice for which it is created).	Y	3 - BR		This will be the Source Invoice Number + "-C" + a unique, sequential number.
Invoicing > Invoice Header	INV		93	For each new (Open) Re-Invoice, generate a unique, unbroken-sequential Invoice Number (i.e., unique to the Credit Invoice for which it is created). Placing Letter at end plus number.	Y	3 - BR		This will be the Source Invoice Number + "-R" + a unique, sequential number.
Invoicing > Invoice Header	INV		94	Allow a user to create a new Invoice	Y	2 - UA	I	
Invoicing > Invoice Header	INV		95	Display the Invoice header	Y	3 - BR		
Invoicing > Invoice Header	INV		96	Allow a user to Edit the Invoice Header (i.e., Payment Authorization, Customer-Defined Attributes, and Notes).	Y	2 - UA	I	
Invoicing > Invoice Header	INV		97	Prevent the user from editing the Invoice Header if the Invoice is a Credit Invoice.	Y	3 - BR		
Invoicing > Invoice Header	INV		98	Prevent the user from editing the Invoice Header unless the Invoice is in Open Mode.	Y	3 - BR		
Invoicing > Invoice Header > Contract Level	INV		99	Upon creation of each new Invoice, allow a user to select the Contract Level, selecting from a list of Contract Levels for the Customer.	Y	2 - UA	I	

Category	Est. Catg.	Date Added	Req#	Requirement	In Scope	Req Type	Role	Notes / Assumptions
Invoicing > Invoice Header > Customer-Defined Attributes	INV		100	Display a list of the Customer-Defined Attributes for the Invoice, and their values.	Y	3 - BR		
Invoicing > Invoice Header > Customer-Defined Attributes	INV		101	For each Open Invoice, allow a user to enter the values for the Customer-Defined Attributes.	Y	2 - UA	I	
Invoicing > Invoice Header > Customer-Defined Attributes	INV		102	For each Open Invoice, validate each entered or modified Customer-Defined Attribute against the Customer-Defined Attribute's regular expression mask, if one exists. If the validation fails, warn the user with a visual cue.	Y	3 - BR		
Invoicing > Invoice Header > Payment Authorization	INV		103	Prevent the user from selecting a Payment Authorization Method that is not available to the Customer.	Y	3 - BR		
Invoicing > Invoice Header > Payment Authorization	INV		104	Upon creation of each new Credit Invoice and Re-Invoice, set the Contract Level to the Contract Level of the Source Invoice.	Y	3 - BR		
Invoicing > Invoice Header > Payment Authorization	INV		105	For each new (Open) Invoice, automatically set the Payment Authorization to that of the Job containing the Staging Area items being added.	Y	3 - BR		
Invoicing > Invoice Header > Payment Authorization	INV		106	Allow a user to change the Payment Authorization for an Open Invoice, selecting from the list of Payment Authorization Methods that are available to the Customer (e.g., Purchase Order or Pending Purchase Order, Credit Card Authorization, and/or No Authorization Required).	Y	2 - UA	I	
Invoicing > Invoice Header > Payment Authorization	INV		107	If a Payment Authorization Method of Purchase Order is selected, require that the user selects one and only one of the following: (a) an existing Purchase Order (one without Purchase Order Line detail), (b) an existing Purchase Order Line, or (c) a Pending Purchase Order. However, Post Status will not be available for Pending POs.	Y	3 - BR		
Invoicing > Invoice Header > Payment Authorization	INV		108	Prevent the user from editing the Payment Authorization unless the Invoice is in Open or Submitted Mode.	Y	3 - BR		
Invoicing > Invoice Header > Payment Authorization	INV		109	Warn the user if the amount remaining on the Purchase Order -- minus the amount of the Invoice -- is less than 15% of the original value of the Purchase Order.	Y	3 - BR		
Invoicing > Invoice Header > Payment Authorization	INV		110	Warn the user if the amount remaining on the Purchase Order -- minus the amount of the Invoice -- is less than zero.	Y	3 - BR		
Invoicing > Invoice Header > Payment Authorization	INV	7/7/2009	379	When a user changes a Payment Authorization Method when invoicing one or more Jobs, update all future created Invoices for that Job to use the selected Payment Authorization Method.	Y	3 - BR		
Invoicing > Invoice Header > Payment Authorization	INV	7/7/2009	467	Prevent the user from selecting a Payment Authorization Method of Purchase Order, when the Customer Site requires Purchase Order Lines.	Y	3 - BR		
Invoicing > Invoice Header > Taxation	INV		111	For each Open Invoice, determine whether the products and/or services are taxable (by Customer Site).	Y	3 - BR		
Invoicing > Invoice Header > Taxation	INV		112	Allow a user to flag a taxable invoice as tax exempt.	Y	2 - UA	I	
Invoicing > Invoice Header > Taxation	INV		113	Allow a user to "un-flag" a taxable invoice as tax exempt.	Y	2 - UA	I	
Invoicing > Invoice Header > User-Entered Invoice Discount	INV	7/7/2009	470	Allow a user to specify a User-Entered Invoice Discount.	Y	2 - UA	I	

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Invoicing > Invoice Header > User-Entered Invoice Discount	INV	7/7/2009	471	When a User-Entered Invoice Discount is specified, changed, or removed, save the Invoice.	Y	3 - BR		
Invoicing > Invoice Header > User-Entered Invoice Discount	INV	7/7/2009	472	Prevent the user from specifying a User-Entered Invoice Discount of less than 0%, or more than 100%.	Y	3 - BR		
Invoicing > Invoice Header > User-Entered Invoice Discount	INV	7/7/2009	473	Prevent the user from specifying a User-Entered Invoice Discount unless the Invoice is in Open Mode.	Y	3 - BR		
Invoicing > Invoice Header > User-Entered Invoice Discount	INV	7/7/2009	474	Prevent the user from specifying a User-Entered Invoice Discount when the Invoice is a Credit Invoice.	Y	3 - BR		
Invoicing > Invoice Header > User-Entered Invoice Discount	INV	7/7/2009	475	Prevent the user from specifying a User-Entered Invoice Discount when the Contract of the Invoice indicates anything other than Branch Standard Pricing.	Y	3 - BR		
Invoicing > Invoice Lines	INV		114	Calculate the Tax for each Item, based upon whether the Item is a Product or Service, whether the Customer Site prescribes a Product or Service Tax Rate, and whether the user has opted to make the Invoice non-taxable.	Y	3 - BR		
Invoicing > Invoice Lines	INV		115	Allow a user to remove one or more selected Invoice Lines -- or a partial quantity of a single Invoice Line -- from the Invoice.	Y	2 - UA	I	
Invoicing > Invoice Lines	INV		116	When one or more Line Items are removed from an Invoice, if one or more of the Items are components of a Package, flag the Package components as unfulfilled.	Y	3 - BR		
Invoicing > Invoice Lines	INV		117	List Invoice Lines, including Item Code, Description, Quantity, Unit of Measure, Price per Unit, Amount, Discount Percentage, and Net Amount.	Y	1 - LIST	I	
Invoicing > Invoice Lines	INV		118	Allow a user to select one or more Invoice Lines.	Y	2 - UA	I	
Invoicing > Invoice Lines	INV		119	Prevent the user from removing one or more selected Invoice Lines -- or a partial quantity of a single Invoice Line -- from the Invoice, if the Invoice is not in Open Mode.	Y	3 - BR		
Invoicing > Invoice Lines	INV		120	Prevent the user from removing a Variance Line from the Invoice.	N	3 - BR		Removed from scope. Variance Lines no longer exist; instead, the Custom View Variance is allocated as a percentage across all Invoice Items, as indicated in other requirements.
Invoicing > Invoice Lines	INV		121	Prevent the user from removing partial quantity of a Package Item from an Invoice.	Y	3 - BR		
Invoicing > Invoice Lines	INV		122	When a quantity of a non-Package item is removed from a regular Invoice, move the quantity back to the Staging Area, and mark the quantity as available for Invoicing.	Y	3 - BR		
Invoicing > Invoice Lines	INV		123	When a Package item is removed from a regular Invoice, the quantity of its Component Items are moved individually back to the Staging Area and marked as available for Invoicing.	Y	3 - BR		
Invoicing > Invoice Lines	INV		124	When one or more Line Items are removed from an Invoice, if the Invoice is authorized by a Purchase Order or Purchase Order Line, recalculate the Remaining Value.	N	3 - BR		Mitigated by Requirements #377 and #446
Invoicing > Invoice Lines	INV		125	When one or more Line Items are removed from an Invoice, if the Invoice has a Custom View, reallocate the Variance.	N	3 - BR		Mitigated by Requirements #378 and #446

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Invoicing > Invoice Lines	INV		126	Prevent the user from removing one or more selected Invoice Lines -- or a partial quantity of a single Invoice Line -- from a Re-Invoice.	Y	3 - BR		To "remove" an item from a Re-Invoice, the user must User No-Charge the item.
Invoicing > Invoice Lines	INV	7/7/2009	345	Calculate the price of each Invoice Line as: (A) The Item Quantity, which is defined as: (A1) The Default Quantity minus (A2) the Contract-Specified No-Charge Quantity minus (A3) the User-Entered No-Charge Quantity; times (B) the Per Unit Price; times one minus (C) The Contract Discount, which is defined as: (C1) The Contract Line Item Discount, if one is specified for the Item Code; otherwise (C2) The Contract Discount; times one minus (D) the User-Entered Invoice Discount; times one minus (E) the User-Entered Line Item Discount; times (F) the Custom View Variance Percentage	Y	3 - BR		
Invoicing > Invoice Lines	INV	7/7/2009	430	Calculate the displayed Discount Percentage as: One minus (A) The Contract Discount, which is defined as: (A1) The Contract Line Item Discount, if one is specified for the Item Code; otherwise (A2) The Contract Discount; times one minus (B) the User-Entered Invoice Discount; times one minus (C) the User-Entered Line Item Discount; times (D) the Custom View Variance Percentage	Y	3 - BR		
Invoicing > Invoice Lines	INV	7/7/2009	446	When one or more Line Items are removed from an Invoice, save the Invoice.	Y	3 - BR		
Invoicing > Invoice Lines > Combining and Allocating Third-Party Charge Items	INV		127	Allow a user to allocate a Third Party Charge Line -- partially or totally -- to a different Service Line.	Y	2 - UA	I	
Invoicing > Invoice Lines > Combining and Allocating Third-Party Charge Items	INV		128	Allow a user to combine two or more Third-Party Charge items into one invoice line item.	Y	2 - UA	I	
Invoicing > Invoice Lines > Combining and Allocating Third-Party Charge Items	INV		129	Prevent the user from combining Third-Party Charge items if the Invoice is not in Open Mode.	Y	3 - BR		
Invoicing > Invoice Lines > Combining and Allocating Third-Party Charge Items	INV		130	When one or more Third-Party Charge Items are combined, if the Invoice is authorized by a Purchase Order or Purchase Order Line, recalculate the Remaining Value.	N	3 - BR		Mitigated by Requirements #377 and #447
Invoicing > Invoice Lines > Combining and Allocating Third-Party Charge Items	INV		131	When one or more Third-Party Charge Items are combined, if the Invoice has a Custom View, recalculate the Variance.	N	3 - BR		Mitigated by Requirements #378 and #447
Invoicing > Invoice Lines > Combining and Allocating Third-Party Charge Items	INV		132	When a combined Third-Party Charge Item is un-combined, if the Invoice is authorized by a Purchase Order or Purchase Order Line, recalculate the Remaining Value.	N	3 - BR		Mitigated by Requirements #377 and #448
Invoicing > Invoice Lines > Combining and Allocating Third-Party Charge Items	INV		133	When a combined Third-Party Charge Item is un-combined, if the Invoice has a Custom View, reallocate the Variance.	N	3 - BR		Mitigated by Requirements #378 and #448
Invoicing > Invoice Lines > Combining and Allocating Third-Party Charge Items	INV		134	Prevent the user from allocating Third-Party Charge revenue to a different Service Line, if the Invoice is not in Open Mode.	Y	3 - BR		

Category	Est. Catg.	Date Added	Req#	Requirement	In Scope	Req Type	Role	Notes / Assumptions
Invoicing > Invoice Lines > Combining and Allocating Third-Party Charge Items	INV	7/7/2009	447	When one or more Third-Party Charge Items are combined, save the Invoice.	Y	3 - BR		
Invoicing > Invoice Lines > Combining and Allocating Third-Party Charge Items	INV	7/7/2009	448	When one or more Third-Party Charge Items are un-combined, save the Invoice.	Y	3 - BR		
Invoicing > Invoice Lines > Combining Items Whose Units of Measure Span Shifts	INV		135	Allow a user to combine two or more Invoice line items that refer to units of measure that span shifts.	Y	2 - UA	I	
Invoicing > Invoice Lines > Combining Items Whose Units of Measure Span Shifts	INV		136	Prevent the user from combining Items with units of measure that span shifts, if the Invoice is not in Open Mode.	Y	3 - BR		
Invoicing > Invoice Lines > Combining Items Whose Units of Measure Span Shifts	INV		137	Prevent the user from combining Items with units of measure that span shifts, if the Item Codes of the source Item Codes are different.	Y	3 - BR		
Invoicing > Invoice Lines > Combining Items Whose Units of Measure Span Shifts	INV		138	Allow a user to undo a combined item for the units of measure that span shifts.	Y	2 - UA	I	
Invoicing > Invoice Lines > Combining Items Whose Units of Measure Span Shifts	INV		139	Prevent the user from un-combining Items with units of measure that span shifts, if the Invoice is not in Open Mode.	Y	3 - BR		
Invoicing > Invoice Lines > Contract-Defined Item Properties	INV		140	Determine the Unit Cost for each Item, based upon the selected Contract Level, and whether it indicates Branch Standard Pricing (in which case Branch Standard Pricing is used), or Contract Specific Pricing or Fixed Fee (in which case the Contract Item's Price is used).	Y	3 - BR		
Invoicing > Invoice Lines > Contract-Defined Item Properties	INV		141	Determine the Unit of Measure for each Item, based upon the selected Contract Level, and whether it indicates Branch Standard Pricing (in which case the Item Master's default Unit of Measure is used), or Contract Specific Pricing or Fixed Fee (in which case the Contract Item Unit of Measure is used).	Y	3 - BR		
Invoicing > Invoice Lines > Contract-Defined Item Properties	INV		142	Determine the Item Code and Description for each Item, based upon the selected Contract Level, and whether it indicates Contract Specific Pricing, and specifies an Item Code and/or Description override; otherwise, the Item Master's default Item Code and/or Description are used.	Y	3 - BR		
Invoicing > Invoice Lines > Invoice Line Editing > Contract-Defined No-Charge Quantity	INV		143	Allow a user to specify a Contract-Defined No-Charge Quantity.	Y	2 - UA	I	
Invoicing > Invoice Lines > Invoice Line Editing > Contract-Defined No-Charge Quantity	INV		150	Prevent the user from specifying a Contract-Defined No-Charge Quantity, when the Invoice is not in Open Mode.	Y	3 - BR		
Invoicing > Invoice Lines > Invoice Line Editing > Contract-Defined No-Charge Quantity	INV		151	Prevent the user from specifying a Contract-Defined No-Charge Quantity, when the Invoice is a Credit Invoice.	Y	3 - BR		
Invoicing > Invoice Lines > Invoice Line Editing > Contract-Defined No-Charge Quantity	INV		152	Prevent the user from specifying a Contract-Defined No-Charge Quantity, when the Invoice is not under a Contract Level that indicates Contract-Defined Pricing.	Y	3 - BR		

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Invoicing > Invoice Lines > Invoice Line Editing > Contract-Defined No-Charge Quantity	INV		153	Prevent the user from specifying a Contract-Defined No-Charge Quantity, when the Invoice is under a Contract Level that indicates Contract-Defined Pricing, but the Contract Item does not indicate a Contract-Defined No-Charge Quantity.	Y	3 - BR		
Invoicing > Invoice Lines > Invoice Line Editing > Contract-Defined No-Charge Quantity	INV		154	Prevent the user from specifying a Contract-Defined No-Charge Quantity, when the Item is Priced on Request.	Y	3 - BR		
Invoicing > Invoice Lines > Invoice Line Editing > Contract-Defined No-Charge Quantity	INV		155	Prevent the user from specifying a Contract-Defined No-Charge Quantity, when the Item is marked as Destroyed.	Y	3 - BR		
Invoicing > Invoice Lines > Invoice Line Editing > Contract-Defined No-Charge Quantity	INV		156	Prevent the user from specifying a Contract-Defined No-Charge Quantity, when the Item is a Third-Party Charge Item.	Y	3 - BR		
Invoicing > Invoice Lines > Invoice Line Editing > Contract-Defined No-Charge Quantity	INV		157	When the Contract-Defined No-Charge Quantity is changed for an Item, if the Invoice is authorized by a Purchase Order or Purchase Order Line, recalculate the Remaining Value.	N	3 - BR		Mitigated by Requirements #377 and #449
Invoicing > Invoice Lines > Invoice Line Editing > Contract-Defined No-Charge Quantity	INV		158	When the Contract-Defined No-Charge Quantity is changed for an Item, if the Invoice has a Custom View, recalculate the Invoice Variance.	N	3 - BR		Mitigated by Requirements #378 and #449
Invoicing > Invoice Lines > Invoice Line Editing > Contract-Defined No-Charge Quantity	INV		159	When the Contract-Defined No-Charge Quantity is changed for an Item, if the Item is a component of a Package, recalculate the Package Variance.	N	3 - BR		Mitigated by Requirements #186 and #449
Invoicing > Invoice Lines > Invoice Line Editing > Contract-Defined No-Charge Quantity	INV	7/7/2009	380	Prevent the user from specifying a Contract-Defined No-Charge Quantity that makes the total invoiceable Item Quantity less than zero.	Y	3 - BR		
Invoicing > Invoice Lines > Invoice Line Editing > Contract-Defined No-Charge Quantity	INV	7/7/2009	449	When the Contract-Defined No-Charge Quantity is changed for an Item, save the Invoice.	Y	3 - BR		
Invoicing > Invoice Lines > Invoice Line Editing > Default Quantity	INV	7/7/2009	381	Allow a user to specify a Default Quantity if at least one of the following is true: (a) A Contract-Specified Unit of Measure is used, and the Unit of Measure in the Item Master is different than the Contract-Specified Unit of Measure. (b) The Contract refers to a Contract-Specified Minimum Daily Billable Labor Duration. (c) The Contract refers to a Contract-Specified Maximum Daily Billable Labor Duration.	Y	2 - UA	I	
Invoicing > Invoice Lines > Invoice Line Editing > Default Quantity	INV	7/7/2009	383	Prevent the user from specifying a Default Quantity, when the Invoice is not in Open Mode.	Y	3 - BR		
Invoicing > Invoice Lines > Invoice Line Editing > Default Quantity	INV	7/7/2009	384	Prevent the user from specifying a Default Quantity, when the Invoice is a Credit Invoice.	Y	3 - BR		

Category	Est. Catg.	Date Added	Req#	Requirement	In Scope	Req Type	Role	Notes / Assumptions
Invoicing > Invoice Lines > Invoice Line Editing > Default Quantity	INV	7/7/2009	385	Prevent the user from specifying a Default Quantity that makes the total invoiceable Item Quantity less than zero.	Y	3 - BR		
Invoicing > Invoice Lines > Invoice Line Editing > Default Quantity	INV	7/7/2009	450	When the selected Contract refers to a Contract-Specified Maximum Daily Billable Labor Duration, prevent the user from specifying a Default Quantity that is greater than Contract-Specified Maximum Daily Billable Labor Duration.	Y	3 - BR		
Invoicing > Invoice Lines > Invoice Line Editing > Description	INV		149	Allow a user to enter or change a description for a Third-Party Charge Item.	Y	2 - UA	I	
Invoicing > Invoice Lines > Invoice Line Editing > Description	INV		176	Prevent the user from changing a description for a Third-Party Charge, when the Invoice is not in Open Mode.	Y	3 - BR		
Invoicing > Invoice Lines > Invoice Line Editing > Price per Unit	INV		145	Allow a user to enter or change the Price per Unit for an Item.	Y	2 - UA	I	
Invoicing > Invoice Lines > Invoice Line Editing > Price per Unit	INV		177	Prevent the user from changing the Price per Unit of an Item, when the Invoice is not in Open Mode.	Y	3 - BR		
Invoicing > Invoice Lines > Invoice Line Editing > Price per Unit	INV		178	Prevent the user from changing the Price per Unit of an Item, when the Invoice is a Credit Invoice.	Y	3 - BR		
Invoicing > Invoice Lines > Invoice Line Editing > Price per Unit	INV		179	Only allow for a user to enter or change a Price per Unit for an item if the item is one of the following: (a) An Item (or Package Item) on a Invoice with a Contract Level that indicates Branch Standard Pricing (b) A Third-Party Charge Item (c) Priced on Request Items	Y	3 - BR		
Invoicing > Invoice Lines > Invoice Line Editing > Price per Unit	INV		180	When a Price per Unit is entered or changed for an Item, if the Invoice is authorized by a Purchase Order or Purchase Order Line, recalculate the Remaining Value.	N	3 - BR		Mitigated by Requirements #377 and #451
Invoicing > Invoice Lines > Invoice Line Editing > Price per Unit	INV		181	When a Price per Unit is entered or changed for an Item, if the Invoice has a Custom View, recalculate the Invoice Variance.	N	3 - BR		Mitigated by Requirements #378 and #451
Invoicing > Invoice Lines > Invoice Line Editing > Price per Unit	INV		182	When a Price per Unit is entered or changed for an Item, if the Item is a component of a Package, recalculate the Package Variance.	N	3 - BR		Mitigated by Requirements #186 and #451
Invoicing > Invoice Lines > Invoice Line Editing > Price per Unit	INV		183	When a Price per Unit is entered or changed for a Package Item, recalculate the Package Variance.	N	3 - BR		Mitigated by Requirements #186 and #451
Invoicing > Invoice Lines > Invoice Line Editing > Price per Unit	INV	7/7/2009	388	Prevent the user from specifying a Price per Unit that is less than zero.	Y	3 - BR		
Invoicing > Invoice Lines > Invoice Line Editing > Price per Unit	INV	7/7/2009	451	When a Price per Unit is entered or changed for an Item or Package Item, save the Invoice.	Y	3 - BR		
Invoicing > Invoice Lines > Invoice Line Editing > User-Specified Discount	INV		144	Prevent the user from specifying a User-Specified Discount, when the Item is marked as Destroyed.	N	3 - BR		Removed from scope. Not needed, per Darrell.
Invoicing > Invoice Lines > Invoice Line Editing > User-Specified Discount	INV		148	Allow a user to specify a User-Specified Discount a Line Item price.	Y	2 - UA	I	

Category	Est. Catg.	Date Added	Req#	Requirement	In Scope	Req Type	Role	Notes / Assumptions
Invoicing > Invoice Lines > Invoice Line Editing > User-Specified Discount	INV		169	Prevent the user from specifying a User-Specified Discount, when the Invoice is not in Open Mode.	Y	3 - BR		
Invoicing > Invoice Lines > Invoice Line Editing > User-Specified Discount	INV		170	Prevent the user from specifying a User-Specified Discount, when the Invoice is a Credit Invoice.	Y	3 - BR		
Invoicing > Invoice Lines > Invoice Line Editing > User-Specified Discount	INV		171	Prevent the user from specifying a User-Specified Discount, when the Item is on an Invoice that has a Contract Level that does not indicate Branch Standard Pricing.	Y	3 - BR		
Invoicing > Invoice Lines > Invoice Line Editing > User-Specified Discount	INV		172	Prevent the user from specifying a User-Specified Discount, when the Item is a Third-Party Charge Item.	N	3 - BR		Removed from scope. Not needed, per Darrell.
Invoicing > Invoice Lines > Invoice Line Editing > User-Specified Discount	INV		173	When a User-Specified Discount is applied to an Item, if the Invoice is authorized by a Purchase Order or Purchase Order Line, recalculate the Remaining Value.	N	3 - BR		Mitigated by Requirements #377 and #452
Invoicing > Invoice Lines > Invoice Line Editing > User-Specified Discount	INV		174	When a User-Specified Discount is applied to an Item, if the Invoice has a Custom View, recalculate the Invoice Variance.	N	3 - BR		Mitigated by Requirements #378 and #452
Invoicing > Invoice Lines > Invoice Line Editing > User-Specified Discount	INV		175	When a User-Specified Discount is applied to an Item, if the Item is a component of a Package, recalculate the Package Variance.	N	3 - BR		Mitigated by Requirements #186 and #452
Invoicing > Invoice Lines > Invoice Line Editing > User-Specified Discount	INV	7/7/2009	452	When a User-Specified Discount is applied to an Item, save the Invoice.	Y	3 - BR		
Invoicing > Invoice Lines > Invoice Line Editing > User-Specified No-Charge Quantity	INV		146	Allow a user to specify a User-Specified No-Charge Quantity.	Y	2 - UA	I	
Invoicing > Invoice Lines > Invoice Line Editing > User-Specified No-Charge Quantity	INV		147	When a User-Specified No-Charge Quantity is entered, allow a user to enter the User-Specified No Charge Reason, as one of the following: (a) By HydroChem's choice, (b) By Customer insistence, or (c) Because of a Gate Log Discrepancy	Y	2 - UA	I	
Invoicing > Invoice Lines > Invoice Line Editing > User-Specified No-Charge Quantity	INV		160	Prevent the user from specifying a User-Specified No-Charge Quantity, when the Invoice is not in Open Mode.	Y	3 - BR		
Invoicing > Invoice Lines > Invoice Line Editing > User-Specified No-Charge Quantity	INV		161	Prevent the user from specifying a User-Specified No-Charge Quantity, when the Invoice is a Credit Invoice.	Y	3 - BR		
Invoicing > Invoice Lines > Invoice Line Editing > User-Specified No-Charge Quantity	INV		162	Prevent the user from specifying a User-Specified No-Charge Quantity, when the Item is Priced on Request.	Y	3 - BR		
Invoicing > Invoice Lines > Invoice Line Editing > User-Specified No-Charge Quantity	INV		163	Prevent the user from specifying a User-Specified No-Charge Quantity, when the Item is marked as Destroyed.	Y	3 - BR		

Category	Est. Catg.	Date Added	Req#	Requirement	In Scope	Req Type	Role	Notes / Assumptions
Invoicing > Invoice Lines > Invoice Line Editing > User-Specified No-Charge Quantity	INV		164	Prevent the user from specifying a User-Specified No-Charge Quantity, when the Item is a Third-Party Charge Item.	Y	3 - BR		
Invoicing > Invoice Lines > Invoice Line Editing > User-Specified No-Charge Quantity	INV		165	Prevent the user from specifying a User-Specified No-Charge Quantity, without supplying the User-Specified No Charge Reason.	Y	3 - BR		
Invoicing > Invoice Lines > Invoice Line Editing > User-Specified No-Charge Quantity	INV		166	When the User-Specified No-Charge Quantity is changed for an Item, if the Invoice is authorized by a Purchase Order or Purchase Order Line, recalculate the Remaining Value.	N	3 - BR		Mitigated by Requirements #377 and #453
Invoicing > Invoice Lines > Invoice Line Editing > User-Specified No-Charge Quantity	INV		167	When the User-Specified No-Charge Quantity is changed for an Item, if the Invoice has a Custom View, recalculate the Invoice Variance.	N	3 - BR		Mitigated by Requirements #378 and #453
Invoicing > Invoice Lines > Invoice Line Editing > User-Specified No-Charge Quantity	INV		168	When the User-Specified No-Charge Quantity is changed for an Item, if the Item is a component of a Package, recalculate the Package Variance.	N	3 - BR		Mitigated by Requirements #186 and #453
Invoicing > Invoice Lines > Invoice Line Editing > User-Specified No-Charge Quantity	INV	7/7/2009	386	Prevent the user from specifying a User-Specified No-Charge Quantity that makes the total invoiceable Item Quantity less than zero.	Y	3 - BR		
Invoicing > Invoice Lines > Invoice Line Editing > User-Specified No-Charge Quantity	INV	7/7/2009	453	When a User-Specified Discount is applied to an Item, save the Invoice.	Y	3 - BR		
Invoicing > Invoice Lines > Packages	INV		49	Prevent the user from setting the quantity of a Package component to a quantity greater than the Package Item's Maximum Quantity Allowed (if it exists).	Y	3 - BR		
Invoicing > Invoice Lines > Packages	INV		50	Prevent the user from setting the quantity of a Package component to a quantity less than the Package Item's Minimum Quantity Allowed (if it exists).	Y	3 - BR		
Invoicing > Invoice Lines > Packages	INV		184	Allow a user to specify the quantity of the Package.	Y	2 - UA	I	
Invoicing > Invoice Lines > Packages	INV		185	Allow a user to delete the Package.	Y	2 - UA	I	
Invoicing > Invoice Lines > Packages	INV		186	When an Invoice is opened or saved, recalculate and reallocate all Package Variances across each Package's Component Items.	Y	3 - BR		The calculation for this is represented in Requirement #348.
Invoicing > Invoice Lines > Packages	INV		187	Allow a user to add a Package to an Invoice.	Y	2 - UA	I	
Invoicing > Invoice Lines > Packages	INV		188	List Packages.	Y	1 - LIST	I	
Invoicing > Invoice Lines > Packages	INV		189	When the user adds a Package to an Invoice, create a Package Variance Line within the Package.	N	3 - BR		Removed from scope. Package Variance Lines no longer exist; instead, the Package Variance is allocated as a percentage across all Package Component Items, as indicated in other requirements.
Invoicing > Invoice Lines > Packages	INV		190	Allow a user to add a partial quantity of a selected Line Item to a Package.	Y	2 - UA	I	

Category	Est. Catg.	Date Added	Req#	Requirement	In Scope	Req Type	Role	Notes / Assumptions
Invoicing > Invoice Lines > Packages	INV		191	Prevent the user from adding a a Package to an Invoice, when the Invoice is not in Open Mode.	Y	3 - BR		
Invoicing > Invoice Lines > Packages	INV		192	Prevent the user from adding a a Package to an Invoice, when the Invoice is a Credit Invoice.	Y	3 - BR		
Invoicing > Invoice Lines > Packages	INV		193	Allow a user to select a Package.	Y	2 - UA	I	
Invoicing > Invoice Lines > Packages	INV		195	Allow a user to add a selected Line Item to a Package.	Y	2 - UA	I	
Invoicing > Invoice Lines > Packages	INV		196	Prevent the user from adding a Line Item to a Package, when the Invoice is not in Open Mode.	Y	3 - BR		
Invoicing > Invoice Lines > Packages	INV		197	Prevent the user from adding a Line Item to a Package, when the Invoice is a Credit Invoice.	Y	3 - BR		
Invoicing > Invoice Lines > Packages	INV		198	Prevent the user from adding a Line Item to a Package, when that Item is not defined as a Package Component.	Y	3 - BR		
Invoicing > Invoice Lines > Packages	INV		199	Prevent the user from adding a Line Item to a Package, when the required quantity of that Item has already been added to the Package.	Y	3 - BR		
Invoicing > Invoice Lines > Packages	INV		200	Prevent the user from adding a Line Item to a Package, when the Package already contains a Component Item from a different Shift.	Y	3 - BR		
Invoicing > Invoice Lines > Packages	INV		201	Prevent the user from adding a Variance Line Item to a Package.	N	3 - BR		Removed from scope. Package Variance Lines no longer exist; instead, the Package Variance is allocated as a percentage across all Package Component Items, as indicated in other requirements.
Invoicing > Invoice Lines > Packages	INV		202	Determine which Equipment Line Items are components of a Package, according to the Contract Level used on the Invoice.	N	3 - BR		Removed from scope, as this was considered to be a Nice-to-Have feature.
Invoicing > Invoice Lines > Packages	INV		203	Provide a visual cue to the user if the Contract Level indicates Contract-Specific Pricing -- one that contains one or more Packages -- and a Primary Equipment line item could be converted into one of those Packages.	N	3 - BR		Removed from scope, as this was considered to be a Nice-to-Have feature.
Invoicing > Invoice Lines > Packages	INV		204	When an Item or partial quantity of an Item is added to a Package, if the Invoice is authorized by a Purchase Order or Purchase Order Line, recalculate the Remaining Value.	N	3 - BR		Mitigated by Requirements #377 and #455
Invoicing > Invoice Lines > Packages	INV		205	When an Item or partial quantity of an Item is added to a Package, if the Invoice has a Custom View, recalculate and reallocate the Variance.	N	3 - BR		Mitigated by Requirements #378 and #455
Invoicing > Invoice Lines > Packages	INV		206	When an Item or partial quantity of an Item is added to a Package, recalculate and reallocate the Variance.	N	3 - BR		Mitigated by Requirements #186 and #455
Invoicing > Invoice Lines > Packages	INV		207	Prevent the user from adding a partial quantity of a Line Item to a Package, when the Invoice is not in Open Mode.	Y	3 - BR		
Invoicing > Invoice Lines > Packages	INV		213	When a Component Item is removed from a Package, if the Invoice has a Custom View, recalculate and reallocate the Invoice Variance.	N	3 - BR		Mitigated by Requirements #378 and #456
Invoicing > Invoice Lines > Packages	INV		214	When a Component Item is removed from a Package, recalculate and reallocate the Package Variance.	N	3 - BR		Mitigated by Requirements #186 and #456
Invoicing > Invoice Lines > Packages	INV		215	Prevent the user from specifying the quantity of a Package, when the Invoice is not in Open Mode.	Y	3 - BR		
Invoicing > Invoice Lines > Packages	INV		216	Prevent the user from modifying the quantity of a Package, when the Invoice is a Credit Invoice.	Y	3 - BR		

Category	Est. Catg.	Date Added	Req#	Requirement	In Scope	Req Type	Role	Notes / Assumptions
Invoicing > Invoice Lines > Packages	INV		217	When a Package quantity is entered or modified, if the Invoice is authorized by a Purchase Order or Purchase Order Line, recalculate the Remaining Value.	N	3 - BR		Mitigated by Requirements #377 and #457
Invoicing > Invoice Lines > Packages	INV		218	When a Package quantity is entered or modified, if the Invoice has a Custom View, recalculate and reallocate the Variance.	N	3 - BR		Mitigated by Requirements #378 and #457
Invoicing > Invoice Lines > Packages	INV		219	When a Package quantity is entered or modified, recalculate and reallocate the Variance.	N	3 - BR		Mitigated by Requirements #186 and #457
Invoicing > Invoice Lines > Packages	INV		220	Prevent the user from deleting a Package, when the Invoice is not in Open Mode.	Y	3 - BR		
Invoicing > Invoice Lines > Packages	INV		221	Prevent the user from deleting a Package, when the Invoice is a Credit Invoice.	Y	3 - BR		
Invoicing > Invoice Lines > Packages	INV		222	When the user deletes a Package from an Invoice, remove the Package Variance Line with the Package.	N	3 - BR		Removed from scope. Package Variance Lines no longer exist; instead, the Package Variance is allocated as a percentage across all Package Component Items, as indicated in other requirements.
Invoicing > Invoice Lines > Packages	INV	7/7/2009	346	Calculate the price of each Package Component Item as: (A) The item quantity, which is defined as: (A1) The Default Quantity minus (A2) the Contract-Specified No-Charge Quantity minus (A3) the User-Entered No-Charge Quantity; times (B) the Per Unit Price; times one minus (C) The Contract Discount, which is defined as: (C1) The Contract Line Item Discount, if one is specified for the Item Code; otherwise (C2) The Contract Discount; times one minus (D) the User-Entered Invoice Discount; times one minus (E) the User-Entered Line Item Discount; times one minus (F) the Package Variance Percentage	Y	3 - BR		
Invoicing > Invoice Lines > Packages	INV	7/7/2009	348	Calculate the Package Variance Percentage as: (A) The price of the Package Item, divided by (B) the price of all the Package Component Items, according to the highest priority current Contract Pricing Level	Y	3 - BR		If Contract-Specified prices are used, the Package Variance is allocated across the component items according to their default Contract-Specified prices. If Branch Standard prices are used, the Package Variance is allocated across the component items according to their default Branch Standard prices. At least one component of a Package will have a non-zero value prior to moving the Invoice out of Open Mode. At least one component of a Package will be required.
Invoicing > Invoice Lines > Packages	INV	7/7/2009	389	If the Invoice's Contract Level indicates Branch Standard Pricing, only allow the user to select one of the Packages covered by Branch Standard Pricing.	Y	3 - BR		
Invoicing > Invoice Lines > Packages	INV	7/7/2009	390	If the Invoice's Contract Level does not indicate Branch Standard Pricing, only allow the user to select one of the Packages specified in the Contract Level.	Y	3 - BR		

Category	Est. Catg.	Date Added	Req#	Requirement	In Scope	Req Type	Role	Notes / Assumptions
Invoicing > Invoice Lines > Packages	INV	7/7/2009	454	When the user adds a Package to an Invoice, save the Invoice.	Y	3 - BR		
Invoicing > Invoice Lines > Packages	INV	7/7/2009	455	When an Item or partial quantity of an Item is added to a Package, save the Invoice.	Y	3 - BR		
Invoicing > Invoice Lines > Packages	INV	7/7/2009	456	When a Component Item is removed from a Package, save the Invoice.	Y	3 - BR		
Invoicing > Invoice Lines > Packages	INV	7/7/2009	457	When a Package quantity is entered or modified, save the Invoice.	Y	3 - BR		
Invoicing > Invoice Lines > Packages	INV	7/7/2009	458	When the user deletes a Package from an Invoice, save the Invoice.	Y	3 - BR		
Invoicing > Invoice Lines > Packages > Components	INV		194	List fulfilled and unfulfilled Package Component Items of a selected Package on the Invoice.	Y	1 - LIST	I	
Invoicing > Invoice Lines > Packages > Components	INV		208	Prevent the user from adding a partial quantity of a Line Item to a Package, when the Package already contains a Component Item from a different Shift.	Y	3 - BR		
Invoicing > Invoice Lines > Packages > Components	INV		209	Allow a user to remove a selected Component Item from a Package.	Y	2 - UA	I	
Invoicing > Invoice Lines > Packages > Components	INV		210	Prevent the user from removing a Component Item from a Package, when the Invoice is not in Open Mode.	Y	3 - BR		
Invoicing > Invoice Lines > Packages > Components	INV		211	Prevent the user from removing a Component Item from a Package, when the Invoice is a Credit Invoice.	Y	3 - BR		
Invoicing > Invoice Lines > Packages > Components	INV		212	When a Component Item is removed from a Package, if the Invoice is authorized by a Purchase Order or Purchase Order Line, recalculate the Remaining Value.	N	3 - BR		Mitigated by Requirements #377 and #209
Invoicing > Invoice Lines > Purchase Order/Line Variance	INV	7/7/2009	377	When an invoice is opened or saved, if the Invoice is authorized by a Purchase Order or Purchase Order Line, recalculate the Remaining Value.	Y	3 - BR		
Invoicing > Invoice Lines > Splitting Labor Time into Other Categories	INV		223	Allow a user to split a Labor Line item into two or more Labor Line Items.	Y	2 - UA	I	
Invoicing > Invoice Lines > Splitting Labor Time into Other Categories	INV		224	Prevent the user from splitting a Labor Item, if the Invoice is not in Open Mode.	Y	3 - BR		
Invoicing > Invoice Lines > Splitting Labor Time into Other Categories	INV		225	Prevent the user from splitting a Labor Item into an additional Labor Item from a different Service Line.	Y	3 - BR		
Invoicing > Invoice Lines > Splitting Labor Time into Other Categories	INV		226	Prevent the user from splitting a Labor Item if the Labor Item is a component of a Package.	Y	3 - BR		
Invoicing > Invoice Lines > Splitting Labor Time into Other Categories	INV		227	When a Labor Line Item is split, if the Invoice is authorized by a Purchase Order or Purchase Order Line, recalculate the Remaining Value.	N	3 - BR		Mitigated by Requirements #377 and #459
Invoicing > Invoice Lines > Splitting Labor Time into Other Categories	INV		228	When a Labor Line Item is split, if the Invoice has a Custom View, recalculate the Variance.	N	3 - BR		Mitigated by Requirements #378 and #459
Invoicing > Invoice Lines > Splitting Labor Time into Other Categories	INV		229	Allow a user to recombine the split Labor Lines items back to their original single-line entry.	Y	2 - UA	I	
Invoicing > Invoice Lines > Splitting Labor Time into Other Categories	INV		230	Prevent the user from recombining a split Labor Item, if the Invoice is not in Open Mode.	Y	3 - BR		

Category	Est. Catg.	Date Added	Req#	Requirement	In Scope	Req Type	Role	Notes / Assumptions
Invoicing > Invoice Lines > Splitting Labor Time into Other Categories	INV		231	When split Labor Line Items are recombined, if the Invoice is authorized by a Purchase Order or Purchase Order Line, recalculate the Remaining Value.	N	3 - BR		Mitigated by Requirements #377 and #460
Invoicing > Invoice Lines > Splitting Labor Time into Other Categories	INV		232	When split Labor Line Items are recombined, if the Invoice has a Custom View, recalculate the Variance.	N	3 - BR		Mitigated by Requirements #378 and #460
Invoicing > Invoice Lines > Splitting Labor Time into Other Categories	INV	7/7/2009	459	When a Labor Line Item is split, save the Invoice.	Y	3 - BR		
Invoicing > Invoice Lines > Splitting Labor Time into Other Categories	INV	7/7/2009	460	When split Labor Line Items are recombined, save the Invoice.	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV		233	When an invoice is Posted, Determine the GL accounts for the revenue for each Item on the Invoice and calculate and allocate the dollar amount associated with each.	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV		234	Allow a user to mark a Re-Invoice as Disapproved. Move the Invoice to Disapproved Mode.	N	2 - UA	C	Some corporate system/process TBD will allow users to approve / disapprove. Per team meeting 7/9/2009 - we need to capture the approval/disapproval in the database, and display this to the user.
Invoicing > Invoice Management and Workflow	INV		235	Determine if an Invoice in Pending Approval Mode, with one or more Approvals, can be fully Approved. If so, move the Invoice to Approved Mode.	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV		236	When a Credit Invoice is Posted, if the Credit Invoice is not marked as Lost Revenue, re-add the quantities of the Credited Items back to the Staging Area.	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV		237	Mark all quantities of Items on a deleted Invoice as invoicable, and refresh the Staging Area to reflect the new Items and quantities.	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV		238	Prevent a user from moving a Credit Invoice out of Open Mode without providing the required Credit Request data (i.e., Credit Reason, Description, and -- if the Credit Invoice will return the data to the Staging Area -- the expected Re-Invoice amount.	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV		239	When an Invoice is Posted, log the Invoice Number as "Posted" with the date/time the Posting occurred and the person who posted it.	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV		240	Prevent the user from moving the Invoice out of Open Mode, if the Invoice contains an Item whose General Ledger code does not exist in the General Ledger table.	Y	3 - BR		HydroChem has indicated that this is in scope, but might not be needed for a beta release.
Invoicing > Invoice Management and Workflow	INV		241	Allow a user to mark an Approved Credit Invoice as Lost Revenue.	N	2 - UA	C	This is already captured in Requirement #52.
Invoicing > Invoice Management and Workflow	INV		242	Allow a user to mark an Invoice variance as Approved.	N	2 - UA	V	Some corporate system/process TBD will allow users to approve / disapprove.
Invoicing > Invoice Management and Workflow	INV		243	Allow a user to change an Invoice from Open to Posted Mode.	Y	2 - UA	I	
Invoicing > Invoice Management and Workflow	INV		244	Allow a user to delete an Open Invoice.	Y	2 - UA	I	
Invoicing > Invoice Management and Workflow	INV		245	When an Invoice is deleted, log the Invoice Number as "No Longer Needed".	Y	3 - BR		

Category	Est. Catg.	Date Added	Req#	Requirement	In Scope	Req Type	Role	Notes / Assumptions
Invoicing > Invoice Management and Workflow	INV		246	Prevent the user from moving the Invoice out of Open Mode, if doing so would exceed the amount remaining on the Purchase Order or Purchase Order Line for that Invoice.	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV		247	Prevent the user from moving the Invoice out of Open Mode, if the Payment Authorization is a Pending Purchase Order.	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV		248	Prevent the user from moving the Invoice out of Open Mode, if the Purchase Order or Purchase Order Line amount is unspecified.	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV		249	Prevent the user from moving the Invoice out of Open Mode, if the Invoice contains a Third-Party Charge Item with an unspecified price.	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV		250	Prevent the user from moving the Invoice out of Open Mode, if the Invoice contains a Third-Party Charge Item with an unspecified description.	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV		251	Prevent the user from moving the Invoice out of Open Mode, if the Invoice contains a Contract Item with a variable item price (i.e., Priced on Request), with an unspecified price.	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV		252	Prevent the user from moving the Invoice out of Open Mode, if one or more Customer-Defined Attributes' values have not been specified. Expected Regular esxpression rule need to validate.	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV		253	Prevent the user from moving the Invoice out of Open Mode, if the Invoice has a Custom View, and no Custom View Line Items with dollar amounts have been specified.	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV		254	Prevent the user from moving the Invoice out of Open Mode, if one or more Packages do not have quantities specified.	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV		255	Prevent the user from moving the Invoice out of Open Mode, if one or more required components of a Package have not yet been fulfilled.	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV		256	Prevent the user from moving an Invoice directly to Posted Mode if the Customer Site requires the Submitted Invoice Mode (for electronic invoicing).	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV		257	Allow a user to change the selected invoice from Open to Submitted Mode.	Y	2 - UA	I	"Submitted" Mode here refers to a mode where the Invoice is "Submitted to the Customer for Review"
Invoicing > Invoice Management and Workflow	INV		258	Prevent the user from moving an Invoice to Submitted Mode if the Customer Site does not require the Submitted Invoice Mode (for electronic invoicing).	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV		259	Prevent an Invoice from going to Submitted or Posted Mode, if the total Invoice variance is greater than n% off the original value of the Invoice, and the Invoice total amount is greater than $x. Instead move the Invoice to Pending Approval Mode.	Y	3 - BR		Assumption: HydroChem will supply the values of n and x prior to testing.
Invoicing > Invoice Management and Workflow	INV		260	Calculate total invoice variance as the difference between all items' default price and the final dollar amount of the invoice.	Y	3 - BR		Assumption: The Variance here is calculated as the difference between the total of all Invoice Lines, where each Line Item's default price is defined as (A1 x B) in requirement 345, and the calculated value of each Line item according to Requirement 345.

Category	Est. Catg.	Date Added	Req#	Requirement	In Scope	Req Type	Role	Notes / Assumptions
Invoicing > Invoice Management and Workflow	INV		261	When a Credit Invoice or Credit/Re-Invoice is moved out of Open Mode, move the Invoice to Pending Approval Mode.	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV		262	Prevent an Invoice from going to Submitted or Posted Mode, if the invoice has been overridden to be non-taxable. Instead move the Invoice to Pending Approval Mode.	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV		263	Allow a user to change the selected Invoice from Submitted to Posted Mode.	Y	2 - UA	I	
Invoicing > Invoice Management and Workflow	INV		264	Allow a user to change the selected Invoice from Submitted to Open Mode.	Y	2 - UA	I	
Invoicing > Invoice Management and Workflow	INV		265	Allow a user to mark an Invoice variance as Disapproved. Move the Invoice to Disapproved Mode.	N	2 - UA	V	Some corporate system/process TBD will allow users to approve / disapprove.
Invoicing > Invoice Management and Workflow	INV		266	Allow a user to mark a Credit Invoice as Approved.	N	2 - UA	C	Some corporate system/process TBD will allow users to approve / disapprove.
Invoicing > Invoice Management and Workflow	INV		267	Allow a user to mark a Credit Invoice as Disapproved. Move the Invoice to Disapproved Mode.	N	2 - UA	C	Some corporate system/process TBD will allow users to approve / disapprove.
Invoicing > Invoice Management and Workflow	INV		268	Allow a user to mark an Invoice as with a Taxability Override as Approved.	N	2 - UA	T	Some corporate system/process TBD will allow users to approve / disapprove.
Invoicing > Invoice Management and Workflow	INV		269	Allow a user to mark an Invoice with a Taxability override as Disapproved. Move the Invoice to Disapproved Mode.	N	2 - UA	T	Some corporate system/process TBD will allow users to approve / disapprove.
Invoicing > Invoice Management and Workflow	INV		270	Allow a user to change the selected Invoice from Pending Approval to Open Mode.	Y	2 - UA	I	
Invoicing > Invoice Management and Workflow	INV		271	Allow a user to change the selected Invoice from Disapproved Mode to Open Mode.	Y	2 - UA	I	
Invoicing > Invoice Management and Workflow	INV		272	Allow a user to change the selected Invoice from Approved Mode to Open Mode.	Y	2 - UA	I	
Invoicing > Invoice Management and Workflow	INV		273	Allow a user to change the selected Invoice from Approved Mode to Submitted Mode.	Y	2 - UA	I	
Invoicing > Invoice Management and Workflow	INV		274	Allow a user to change the selected Invoice from Approved Mode to Posted Mode.	Y	2 - UA	I	
Invoicing > Invoice Management and Workflow	INV		275	Prevent the user from moving the Invoice to Posted Mode, if the Invoice contains one or more Packages without a specified Price per Unit.	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV		276	Allow a user to mark a Re-Invoice as Approved.	N	2 - UA	C	Some corporate system/process TBD will allow users to approve / disapprove.
Invoicing > Invoice Management and Workflow	INV		277	Prevent a user from marking a Re-Invoice as Approved without providing the required Credit Request data.	N	3 - BR		Repeat of Requirement #238. Per review on 7/7/2009 - Capture the reason, description, expected rebill amount (if there is not an automatic rebill). Branch admin enters this with credit. Allowance added for additional requirements.
Invoicing > Invoice Management and Workflow	INV		278	When a Credit Invoice is Posted, if the Credit Invoice is marked as Lost Revenue, do not re-add the quantities of the Credited Items back to the Staging Area. Instead, mark the quantities of the items as uninvoiceable.	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV	7/7/2009	349	Prevent the user from moving the Invoice out of Open Mode if the Invoice contains a Package with component items that are all zero priced.	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV	7/7/2009	350	Prevent the user from moving the Invoice out of Open Mode if the Invoice has a Custom View, and the Custom View has no Custom View Line with a dollar value.	Y	3 - BR		

Category	Est. Catg.	Date Added	Req#	Requirement	In Scope	Req Type	Role	Notes / Assumptions
Invoicing > Invoice Management and Workflow	INV	7/7/2009	351	Prevent the user from moving the Invoice out of Open Mode if the Invoice has a Custom View, and the Reference Invoice has a zero dollar value.	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV	7/7/2009	352	Prevent the user from moving the Invoice to Posted Mode, if doing so would exceed the amount remaining on the Purchase Order or Purchase Order Line for that Invoice.	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV	7/7/2009	353	Display the Current Invoice Mode.	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV	7/7/2009	387	Prevent the user from moving an Invoice out of Open Mode, if the Invoice is under Contract-Specified Pricing, and contains one or more Items where the Unit of Measure in the Item Master is different from the Contract-Specified Unit of Measure, for which no Item Quantity exists.	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV	7/7/2009	461	Prevent the user from moving an Invoice out of Open Mode, if a Labor Item on the Invoice refers to a Shift Summary Labor Line whose start/stop date/time overlaps with another Shift Summary Labor Line within the system.	Y	3 - BR		
Invoicing > Invoice Management and Workflow	INV	7/7/2009	462	Prevent the user from Posting an Invoice, if a Labor Item on the Invoice refers to a Shift Summary Labor Line whose start/stop date/time overlaps with another Shift Summary Labor Line within the system and both refer to the same employee ID.	Y	3 - BR		
Invoicing > Invoice Management and Workflow > Custom Exports	INV	7/7/2009	391	Allow a user to generate a Customer-Specific Invoice Export.	Y	2 - UA	I	
Invoicing > Invoice Management and Workflow > Custom Exports	INV	7/7/2009	392	Prevent the user from generating a Customer-Specific Invoice Export if the Customer does not accept Customer-Specific Invoice Exports.	Y	3 - BR		
Invoicing > Invoice Management and Workflow > Custom Exports	INV	7/7/2009	393	Prevent the user from generating a Customer-Specific Invoice Export, if the Invoice is not in Posted Mode, and the Customer requires Customer-Specific Invoice Exports from Posted Mode.	Y	3 - BR		
Invoicing > Invoice Management and Workflow > Custom Exports	INV	7/7/2009	394	Prevent the user from generating a Customer-Specific Invoice Export, if the Invoice is not in Submitted Mode, and the Customer requires Customer-Specific Invoice Exports from Submitted Mode.	Y	3 - BR		
Invoicing > Invoice Queue	INV		279	List all Invoices [Invoice Queue]	Y	1 - LIST	I	
Invoicing > Invoice Queue	INV		280	Allow a user to filter the Invoices in the Invoice Queue by Customer Site Keyword search (on Customer Site), Customer Number, Payment Authorization, Creation Date Range, Posted Data Range, Invoice Number, Branch Oracle Code, Invoice Mode (e.g., Open, Posted, etc.), and/or Invoice Type (Invoice, Credit Invoice, Re-Invoice)	Y	2 - UA	I	
Invoicing > Invoice Queue	INV		281	Allow a user to filter the Invoices in the Invoice Queue by Status (e.g., Open, Pending Approval, Approved, Disapproved, Submitted, Posted).	N	2 - UA	I	Covered by Requirement #280.
Invoicing > Invoice Queue	INV		282	Allow a user to filter the Invoices in the Invoice Queue by Type (e.g., Invoice, Prepayment Invoice, Credit Invoice, Credit Reinvoice)	N	2 - UA	I	Covered by Requirement #280.
Invoicing > Invoice Queue	INV		283	Allow a user to filter the Invoices in the Invoice Queue by Date.	N	2 - UA	I	Covered by Requirement #280.

Category	Est. Catg.	Date Added	Req#	Requirement	In Scope	Req Type	Role	Notes / Assumptions
Invoicing > Invoice Queue	INV		284	Sort the Invoices in the Invoice Queue by Invoice Number (descending)	Y	3 - BR		
Invoicing > Invoice Queue	INV		285	Allow a user to open an Invoice from the Invoice Queue.	Y	2 - UA	I	
Invoicing > Re-Invoices	INV		286	Allow a user to create a Re-Invoice from from a Credit Invoice.	N	2 - UA	I	Covered by Requirement #52. Per comments from 7/7/2009 review - The source must be a Credit Invoice and it must be done at the same time as the Reinvoice. Allowance added for uncertainty around how the reinvoice process will be implemented.
Invoicing > Re-Invoices	INV		287	When a Re-Invoice mode changes, automatically change the mode of its corresponding Credit Invoice.	Y	3 - BR		
Invoicing > Re-Invoices	INV		288	When a Re-Invoice is authorized by the same Purchase Order or Purchase Order Line of the source Invoice, when recalculating the Remaining Value of the Purchase Order or Purchase Order Line, also calculate the value of Credit of the source Invoice.	Y	3 - BR		
Invoicing > Re-Invoices	INV		289	If a user creates a Re-Invoice from an Invoice with a Custom View, automatically create a Custom View Line Items for the Re-Invoice, and set the Description of each to the Description of each Custom View Line Item of the source Invoice, and the Dollar Amount of each to the Dollar Amount of each Custom View Line Item of the source Invoice.	Y	3 - BR		Allowance added for uncertainty around how the reinvoice process will be implemented.
Invoicing > Re-Invoices	INV	7/7/2009	395	When a Credit Invoice mode changes, if the Credit Invoice has a corresponding Re-Invoice, automatically change the mode of its corresponding Re-Invoice.	Y	3 - BR		
Invoicing > Staging Area	INV		290	List all the uninvoiced items for that Customer Site, by the Item Description.	Y	1 - LIST	I	The term "uninvoiced items" here refers to items that are not on an Invoice, as well as items that were once on a Posted Invoice, but where the Invoice was Credited, and its items returned to the Staging Area.
Invoicing > Staging Area	INV		291	Organize the Staging Area items by Job (chronologically, from oldest to most recent), by Shift within the Job (chronologically, from oldest to most recent), by Item Type within the Shift, and by Description within the Item Type.	Y	3 - BR		
Invoicing > Staging Area	INV		292	Allow a user to search for a Job by entering a Job Number, and navigate the user to that Job in the Staging Area.	Y	2 - UA	I	
Invoicing > Staging Area	INV	7/7/2009	463	Allow a user to view a Staging Area Item's Item Code, Quantity available for invoicing, and Unit of Measure.	Y	2 - UA	I	
Invoicing > Staging Area	INV	7/7/2009	464	Allow a user to filter the Staging Area by Payment Authorization, initializing the Payment Authorization to that of the Customer Site/Payment Authorization selected in the Inbox Queue, or of the current Payment Authorization of the Invoice selected in the Invoice Queue. Limit the selectable Payment Authorizations to those of Jobs for the selected Customer Site with Items remaining to be invoiced.	Y	2 - UA	I	
Invoicing > Staging Area	INV	7/7/2009	468	Allow a user to filter the Staging Area to show either: (a) All Items (b) Only Labor Items	Y	2 - UA	I	

Category	Est. Catg.	Date Added	Req#	Requirement	In Scope	Req Type	Role	Notes / Assumptions
Invoicing > Staging Area > Adding Staging Area Lines to Invoice	INV		293	Allow a user to move the selected Items in the Staging Area (or those within the selected Shifts or Jobs) to an Open invoice.	Y	2 - UA	I	
Invoicing > Staging Area > Adding Staging Area Lines to Invoice	INV		294	If the Invoice is authorized by a Purchase Order or Purchase Order Line, recalculate the Remaining Value when an Item is added from the Staging Area.	N	3 - BR		Mitigated by Requirements #377 and #465
Invoicing > Staging Area > Adding Staging Area Lines to Invoice	INV		295	If the Invoice has a Custom View, recalculate the Variance when an Item is added from the Staging Area.	N	3 - BR		Mitigated by Requirements #378 and #465
Invoicing > Staging Area > Adding Staging Area Lines to Invoice	INV		296	Allow a user to select one or multiple Staging Area lines.	Y	2 - UA	I	
Invoicing > Staging Area > Adding Staging Area Lines to Invoice	INV		297	Allow a user to select one or multiple Shifts in the Staging Area.	Y	2 - UA	I	
Invoicing > Staging Area > Adding Staging Area Lines to Invoice	INV		298	Allow a user to select one or multiple Jobs in the Staging Area.	Y	2 - UA	I	
Invoicing > Staging Area > Adding Staging Area Lines to Invoice	INV		299	Prevent a user from moving Staging Area Items to a Credit Invoice.	Y	3 - BR		
Invoicing > Staging Area > Adding Staging Area Lines to Invoice	INV		300	Prevent a user from moving Staging Area Items to a Re-Invoice.	Y	3 - BR		
Invoicing > Staging Area > Adding Staging Area Lines to Invoice	INV		301	When Items are moved from the Staging Area to an Invoice, reduce the invoicable quantities of the Items, and refresh the Staging Area to reflect the remaining Items and quantities.	Y	3 - BR		
Invoicing > Staging Area > Adding Staging Area Lines to Invoice	INV		302	Prevent the user from moving a Labor item to an Invoice if the Labor item refers to a Pending Employee.	Y	3 - BR		
Invoicing > Staging Area > Adding Staging Area Lines to Invoice	INV		303	Allow a user to create a new Invoice from the selected Staging Area Line(s).	N	2 - UA	I	Not a requirement.
Invoicing > Staging Area > Adding Staging Area Lines to Invoice	INV		304	Warn the user when moving a Labor or Equipment item to an Invoice if the Customer Site requires Labor / Equipment Time Reconciliations that have not been completed.	Y	3 - BR		HydroChem has indicated that this is in scope, but might not be needed for a beta release.
Invoicing > Staging Area > Adding Staging Area Lines to Invoice	INV	7/7/2009	465	When an Item is added from the Staging Area, save the Invoice.	Y	3 - BR		
Invoicing > Staging Area > Adding Staging Area Lines to Invoice	INV	7/7/2009	466	Provide a visual cue to the user if a Labor Item in the Staging Area refers to a Pending Employee.	Y	3 - BR		
Invoicing > Staging Area > Adding Staging Area Lines to Invoice	INV	7/7/2009	469	If a user moves one or more selected Shifts or Jobs to an Invoice, and the Staging Area filter is set to show "Only Labor Items", only move the Labor items within the selected Shifts or Jobs to the Invoice.	Y	3 - BR		
Invoicing > Staging Area > Warnings and Adjustments	INV		305	Automatically adjust Labor and Equipment time entries to their saved Gate Log Reconciliation values, if applicable.	Y	3 - BR		HydroChem has indicated that this is in scope, but might not be needed for a beta release.
Invoicing > Staging Area > Warnings and Adjustments	INV		306	Warn the user if the Staging Area contains two or more Labor or Equipment time entries that overlap.	N	3 - BR		Mitigated by Requirement #461

Category	Est. Catg.	Date Added	Req#	Requirement	In Scope	Req Type	Role	Notes / Assumptions
Invoicing > Staging Area > Warnings and Adjustments	INV		307	If a material item has a quantity that has been marked as destroyed, automatically split the item into Used Item and Destroyed Item staging area items, as needed.	Y	3 - BR		HydroChem has indicated that this is in scope, but might not be needed for a beta release.
Invoicing > Staging Area > Warnings and Adjustments	INV		308	Automatically adjust Labor and Equipment time entries up to a contract-specified minimum quantity, if one exists.	Y	3 - BR		
Invoicing > Staging Area > Warnings and Adjustments	INV		309	Automatically adjust Labor and Equipment time entries down to a contract-specified maximum quantity, if one exists.	Y	3 - BR		HydroChem has indicated that this is in scope, but might not be needed for a beta release.
Payroll > Employee Payroll Lines	PAY		310	Calculate special payment cases (e.g., overtime, double-time, holiday time, etc.).	N	3 - BR		Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Employee Payroll Lines	PAY		311	Prevent a user from editing an Employee Payroll Line in a closed Payroll Period.	N	3 - BR		Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Employee Payroll Lines	PAY		312	Allow a user to delete an Employee Payroll Line.	N	2 - UA	P	Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Employee Payroll Lines	PAY		313	List Employee Payroll Lines	N	1 - LIST	P	Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Employee Payroll Lines	PAY		314	Sort Employee Payroll Lines	N	3 - BR		Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Employee Payroll Lines	PAY		315	Allow a user to create a new Employee Payroll Line.	N	2 - UA	P	Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Employee Payroll Lines	PAY		316	Prevent a user from creating a new Employee Payroll Line for a billable category.	N	3 - BR		Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Employee Payroll Lines	PAY		317	Allow a user to edit an Employee Payroll Line.	N	2 - UA	P	Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Employee Payroll Lines	PAY		318	Prevent a user from increasing the payable time for a billable Payroll record above the calculated value.	N	3 - BR		Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Employee Payroll Lines	PAY		319	Prevent a user from changing a non-billable category to a billable category.	N	3 - BR		Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Employee Payroll Lines	PAY		320	Prevent a user from changing a billable category to a non-billable category.	N	3 - BR		Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.

Category	Est. Catg.	Date Added	Req#	Requirement	In Scope	Req Type	Role	Notes / Assumptions
Payroll > Employee Payroll Lines	PAY		321	Prevent a user from specifying a date beyond the end of the Payroll Period.	N	3 - BR		Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Employee Payroll Lines	PAY		322	Prevent a user from deleting an Employee Payroll Line for billable time.	N	3 - BR		Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Employee Payroll Lines	PAY		323	Prevent a user from deleting an Employee Payroll Line in a closed Payroll Period.	N	3 - BR		Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Employee Payroll Periods	PAY		324	Automatically populate Employee Payroll Periods list.	N	3 - BR		Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Employee Payroll Periods	PAY		325	Automatically calculate differences between prior period Payroll data imported from Shift Summaries, and current period Payroll data imported from Shift Summaries, and generate offsetting records.	N	3 - BR		Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Employee Payroll Periods	PAY		326	Allow a user to delete an Employee Payroll Period.	N	2 - UA	P	Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Employee Payroll Periods	PAY		327	Allow a user to match a Pending Employee from a Pending Employee Payroll Period to an Oracle Employee.	N	2 - UA	P	Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Employee Payroll Periods	PAY		328	Allow a user to see Payroll data for one of its Employees from Payroll data entered at another Branch.	N	2 - UA	P	Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Employee Payroll Periods	PAY		329	Prevent a user from editing Payroll data for one of its Branch's Employees, if the Payroll data was entered at another Branch.	N	3 - BR		Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Employee Payroll Periods	PAY		330	List Employee Payroll Periods.	N	1 - LIST	P	Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Employee Payroll Periods	PAY		331	Sort Employee Payroll Periods.	N	3 - BR		Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Employee Payroll Periods	PAY		332	Allow a user to create a new Employee Payroll Period.	N	2 - UA	P	Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Employee Payroll Periods	PAY		333	Prevent a user from creating an Employee Payroll Period for an Employee that already has an Employee Payroll Period.	N	3 - BR		Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.

Category	Est. Catg.	Date Added	Req#	Requirement	In Scope	Req Type	Role	Notes / Assumptions
Payroll > Employee Payroll Periods	PAY		334	List Pending Employee Payroll Periods	N	1 - LIST	P	Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Employee Payroll Periods	PAY		335	Allow a user to select an Employee Payroll Period.	N	2 - UA	P	Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Employee Payroll Periods	PAY		336	Allow a user to access an Employee Payroll Period.	N	2 - UA	P	Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Employee Payroll Periods	PAY		337	Prevent a user from deleting an Employee Payroll Period that contains billable time imported from a Shift Summary.	N	3 - BR		Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Employee Payroll Record > Listing	PAY	7/8/2009	406	List the Employee Payroll Records within the Employee Payroll Week, displaying date, Pay Type, Job (if applicable), and Shift (if applicable), Entered-By Branch, and Duration (in hours:minutes).	Y	1 - LIST	P	
Payroll > Employee Payroll Record > Listing	PAY	7/8/2009	407	Sort the Employee Payroll Records by date (ascending), then by Pay Type (ascending by Pay Type Code).	Y	3 - BR		
Payroll > Employee Payroll Record > Listing	PAY	7/8/2009	408	Filter the Employee Payroll Records by selected Employee and selected Employee Payroll Week, for all Employee Payroll Records manually entered by the Branch, plus all Employee Payroll Records for an Employee of the Branch.	Y	3 - BR		
Payroll > Employee Payroll Record > Listing	PAY	7/8/2009	409	Aggregate the Employee Payroll Records by date, Pay Type, Home Branch, Entered Branch, Job (if applicable), and Shift (if applicable), summing the Duration.	Y	3 - BR		Use abbreviation for Code, not spelled out code.
Payroll > Employee Payroll Record > Listing	PAY	7/8/2009	410	Allow a user to add a new Employee Payroll Record.	Y	2 - UA	P	People on LTD or STD cannot have hours entered. - 2 Hours

Category	Est. Catg.	Date Added	Req#	Requirement	In Scope	Req Type	Role	Notes / Assumptions
Payroll > Employee Payroll Record > Listing > Special Payment Calculations	PAY	7/8/2009	403	Automatically calculate special payment cases (e.g., overtime, double-time, etc.) for added, edited, and deleted records.	Y	3 - BR		Special Payment cases need to be handled by State with a default if no special circumstances exist for that state. California rules are as follows: Apply to any California employee working anywhere, and any employee working in a California site. o If an employee works more than 8 hours in a day but less than 12 hours, these hours are 1.5x and anything 12 or over is 2x o If an employee works more than 40 hours in a week all subsequent hours are 1.5x o If an employee works 6 consecutive days in a week, the seventh day is 1.5x for the first 8 hours and 2x for all other hours Must calculate over time for non-California employees. Overtime is defined as any non Benefit hours over 40 hours. Default Rules are: 1. A day is defined as midnight to midnight local time 2. Salary employees do not qualify for overtime 3. Benefit Hours (H, F, J, MI, SI, V) do not count towards overtime The rules to apply are limited to: (a) After x hours per day (midnight-to-midnight), Overtime applies (b) After x hours per week (Monday to Sunday),
Payroll > Employee Payroll Record > Listing > Special Payment Calculations	PAY	7/8/2009	404	Display the calculated straight time, overtime, double-time and total hours durations for the the Employee Payroll Week.	Y	3 - BR		
Payroll > Employee Payroll Record > Listing > Special Payment Calculations	PAY	7/8/2009	405	If an Employee with an Employee Type of "Part-Time Professional" has one or more Employee Payroll Records for a day, and the total duration of all Employee Payroll records is greater than 0:00, automatically calculate that Employee's Duration at 8:00 hours per day.	Y	3 - BR		From NAT, PTP Rules are: --No overtime --No holiday, vacation, health/wefare benefits --8 hours is a day --PTPs paid a daily rate; e.g. , $400/day; which equates to $50/hour ... regardless of number of hours worked, we pay up to max of daily rate --Less than 8 hours/day should pay equivalent to hourly rate x # of hours; e.g.; 4 hours actual worked x $50 hourly rate = $200. --If they work more than 5 days during the week they should get paid their normal daily rate for the additional day or two Three new Business Rules require 16 additional hours.
Payroll > Employee Payroll Record > Viewing/Editing	PAY	7/8/2009	411	Allow a user to access an existing Employee Payroll Record.	Y	2 - UA	P	

Category	Est. Catg.	Date Added	Req#	Requirement	In Scope	Req Type	Role	Notes / Assumptions
Payroll > Employee Payroll Record > Viewing/Editing	PAY	7/8/2009	412	Allow a user to edit an existing Employee Payroll Record, including the Employee, the date worked, the Pay Type, the Duration in hours:minutes, and the Shift Summary Number.	Y	2 - UA	P	--An employee can’t take more vacation or sick than they are eligible for as defined by HydroChem policy. These 5 new business rules require 24 additional hours to implement. --An employee can’t take Vacation or Sick leave on a weekend --An employee can’t take more than 40 hours vacation in a week --An employee can’t take more than 10 hours vacation / sick in a day --Holiday pay is exactly 8 hours --Vacation plus Sick plus all other time for a given day can’t exceed 10 hours
Payroll > Employee Payroll Record > Viewing/Editing	PAY	7/8/2009	413	Allow a user to delete an existing Employee Payroll Record.	Y	2 - UA	P	
Payroll > Employee Payroll Record > Viewing/Editing	PAY	7/8/2009	414	Prevent a user from editing a Manual Employee Payroll Record not created at the user's Branch.	Y	3 - BR		All Pay Types in the system will be flagged as "Automatic" or "Manual" (which could be "Manual" or "Manual Billable").
Payroll > Employee Payroll Record > Viewing/Editing	PAY	7/8/2009	415	Prevent a user from editing an Automatic Employee Payroll Record.	Y	3 - BR		All Pay Types in the system will be flagged as "Automatic" or "Manual" (which could be "Manual" or "Manual Billable").
Payroll > Employee Payroll Record > Viewing/Editing	PAY	7/8/2009	416	Prevent a user from deleting a Manual Employee Payroll Record not created at the user's Branch.	Y	3 - BR		All Pay Types in the system will be flagged as "Automatic" or "Manual" (which could be "Manual" or "Manual Billable").
Payroll > Employee Payroll Record > Viewing/Editing	PAY	7/8/2009	417	Prevent a user from deleting an Automatic Employee Payroll Record.	Y	3 - BR		All Pay Types in the system will be flagged as "Automatic" or "Manual" (which could be "Manual" or "Manual Billable").
Payroll > Employee Payroll Record > Viewing/Editing	PAY	7/8/2009	418	When a Shift Summary Labor Line is recorded by the system as added, create one (or two, if the Shift Summary Labor Line spans midnight of Sunday night of the time zone of the Employee's Home Branch) Automatic Employee Payroll Records, including all time for the Employee Payroll Record within the Payroll Week for the Branch of the Shift Summary's Job, starting Monday morning midnight of the time zone of the RS/FS device, ending Sunday night midnight of the time zone of the RS/FS device.	Y	3 - BR		
Payroll > Employee Payroll Record > Viewing/Editing	PAY	7/8/2009	419	When a Shift Summary Labor Line is recorded by the system as edited, create two Automatic Employee Payroll Records for every existing, current, related Automatic Employee Payroll Record, one with a negative-Duration of the existing Automatic Employee Payroll Record(s) for the Shift Summary Labor Line, and one with a positive-Duration of the new Automatic Employee Payroll Record(s) for the Shift Summary Line.	Y	3 - BR		
Payroll > Employee Payroll Record > Viewing/Editing	PAY	7/8/2009	420	When a Shift Summary Labor Line is recorded by the system as deleted, create an Automatic Employee Payroll Record for every existing, current, related Automatic Employee Payroll Record, with a negative-Duration of the existing Automatic Employee Payroll Record for the Shift Summary Labor Line.	Y	3 - BR		

Category	Est. Catg.	Date Added	Req#	Requirement	In Scope	Req Type	Role	Notes / Assumptions
Payroll > Employee Payroll Record > Viewing/Editing	PAY	7/8/2009	425	When a Manual Employee Payroll Record is edited, automatically create a Manual Employee Payroll Records with a negative-Duration of the existing Manual Employee Payroll Record, and one with a positive-Duration of the new Manual Employee Payroll Record.	Y	3 - BR		
Payroll > Employee Payroll Record > Viewing/Editing	PAY	7/8/2009	426	When a Manual Employee Payroll Record is deleted, create a Manual Employee Payroll Records with a negative-Duration of the existing Manual Employee Payroll Record.	Y	3 - BR		
Payroll > Employee Payroll Record > Viewing/Editing	PAY	7/8/2009	435	Prevent a user from saving an Employee Payroll Record without a specified Employee.	Y	3 - BR		
Payroll > Employee Payroll Record > Viewing/Editing	PAY	7/8/2009	436	Prevent a user from saving an Employee Payroll Record without a specified Pay Type.	Y	3 - BR		
Payroll > Employee Payroll Record > Viewing/Editing	PAY	7/8/2009	437	Prevent a user from saving an Employee Payroll Record without a specified Duration.	Y	3 - BR		
Payroll > Employee Payroll Record > Viewing/Editing	PAY	7/8/2009	438	Prevent a user from saving an Employee Payroll Record without a specified Date.	Y	3 - BR		
Payroll > Employee Payroll Record > Viewing/Editing	PAY	7/8/2009	439	Prevent a user from saving an Employee Payroll Record without a specified Shift Summary, if the Pay Type is "Manual Billable".	Y	3 - BR		Also need to require a Customer Number and a Job number. This Business Rule already exists. Wire up here requires 4 additional hours.
Payroll > Employee Payroll Record > Viewing/Editing > Duration	PAY	7/8/2009	423	Prevent the user from specifying the Duration of an Automatic Employee Payroll Record to less than zero, or more than the value recorded on the Shift Summary.	N	3 - BR		Due to complexities with open shifts, synchronization, etc., this has been removed from scope. This can be handled through a negative-duration Manually-Entered Billable Employee Payroll Record
Payroll > Employee Payroll Record > Viewing/Editing > Duration	PAY	7/8/2009	424	Prevent the user from specifying the Duration of an Employee Payroll Record to any value that would make the sum of all Employee Payroll Records of the specified Pay Type on the specified Date for the Branch who created the Employee Payroll Record be less than zero, unless the Pay Type is "Manual Billable".	Y	3 - BR		
Payroll > Employee Payroll Record > Viewing/Editing > Pay Type	PAY	7/8/2009	422	Prevent the user from specifying a Pay Type that is an Automatic Employee Pay Type.	Y	3 - BR		All Pay Types in the system will be flagged as "Automatic" or "Manual" (which could be "Manual" or "Manual Billable").
Payroll > Employee Payroll Record > Viewing/Editing > Pay Type	PAY	7/8/2009	427	Prevent the user from changing the Pay Type of an Automatic Employee Payroll Record.	Y	3 - BR		
Payroll > Employee Payroll Record > Viewing/Editing > Pay Type	PAY	7/8/2009	428	Prevent the user from changing the Pay Type of a Manual Employee Payroll Record to an Automatic Pay Type.	Y	3 - BR		All Pay Types in the system will be flagged as "Automatic" or "Manual" (which could be "Manual" or "Manual Billable").
Payroll > Employee Payroll Record > Viewing/Editing > Shift Summary Number	PAY	7/8/2009	421	Prevent the user from entering a Shift Summary Number for an Employee Payroll Record if the Pay Type is not "Manual Billable" type.	Y	3 - BR		
Payroll > Employee Payroll Weeks	PAY	7/8/2009	398	Prepopulate the Employee Payroll Weeks to automatically appear within a Payroll Week, which is a combination of Employees with Automatic Employee Payroll Records for the Payroll Week (i.e., those Employees with billable hours for the current Branch), and Employees with Manual Employee Payroll Records for the current and one prior Payroll Weeks.	Y	3 - BR		

Category	Est. Catg.	Date Added	Req#	Requirement	In Scope	Req Type	Role	Notes / Assumptions
Payroll > Employee Payroll Weeks	PAY	7/8/2009	399	List the Employee Payroll Weeks within a Payroll Week, including First Name, Last Name, Employee Number, Home Branch Code, Employee Type (i.e., Regular or Part-Time Professional), Straight Time Hours, Overtime Hours, Double-Time Hours, Input Branch and Total Hours.	Y	1 - LIST	P	
Payroll > Employee Payroll Weeks	PAY	7/8/2009	400	Sort the Employee Payroll Weeks by Last Name (ascending), then by First Name (ascending)	Y	3 - BR		
Payroll > Employee Payroll Weeks	PAY	7/8/2009	402	Allow a user to access an Employee Payroll Week.	Y	2 - UA	P	
Payroll > Employee Selection	PAY	7/7/2009	375	Filter the Employees by those who were Active (according to Oracle) on or after Monday of the previous week.	Y	3 - BR		
Payroll > Employee Selection	PAY	7/8/2009	431	List Employees, including First Name, Last Name, Employee Number, Employee Type (i.e., Regular or Part-Time Professional).	Y	1 - LIST	P	
Payroll > Employee Selection	PAY	7/8/2009	432	Allow a user to sort Employees by Employee ID (ascending), or by Last Name (ascending)/First Name (ascending), default by Last Name/First Name.	Y	2 - UA	P	
Payroll > Employee Selection	PAY	7/8/2009	433	Allow a user to filter Employees by Branch, default to the Home Branch.	Y	2 - UA	P	
Payroll > Employee Selection	PAY	7/8/2009	434	Allow a user to select an Employee.	Y	2 - UA	P	
Payroll > Payroll Periods	PAY		338	List Payroll Periods.	N	1 - LIST	P	Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Payroll Periods	PAY		339	Sort Payroll Periods in descending order by date.	N	3 - BR		Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Payroll Periods	PAY		340	Allow a user to select a Payroll Period.	N	2 - UA	P	Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Payroll Periods	PAY		341	Allow a user to access an existing Payroll Period.	N	2 - UA	P	Removed from scope, as the Payroll Workflow was redesigned. All needed business requirements are captured in other items in this list.
Payroll > Payroll Weeks	PAY	7/8/2009	396	Allow a user to access the current Payroll Week.	Y	2 - UA	P	
Payroll > Payroll Weeks	PAY	7/8/2009	397	Allow a user to select a Payroll Week by specifying a date within the Payroll Week (Monday to Sunday).	Y	2 - UA	P	

Category	Est. Catg.	Date Added	Req#	Requirement	In Scope	Req Type	Role	Notes / Assumptions
Payroll > Posting	PAY	7/8/2009	429	Allow for an external system/process to flag each Employee Payroll Record as having been imported into Oracle as of a provided date.	Y	3 - BR		Assumption in that HydroChem is responsible for closing a Payroll Week for each Employee. As such, Intellinet will provide the raw data (e.g., Employee, date of labor, duration in hours:minutes, Pay Type, Shift (when applicable), Job (when applicable), Branch that created the record, and the Home Branch of the Employee), via the RS2 synchronization process. HydroChem is responsible for extracting this data from the RS2 database, and using this data to determine how to pay the Employees. Assumption is that HydroChem is responsible for writing the mechanism required to convert or translate raw payroll records from RS2 into usable Oracle payroll records. Intellinet will provide a documented interface for reading from and updating RS2 Payroll data. Currently the assumption is that Payroll data transfer interfaces will only provide for serial/atomic row-level transaction processing. Batch processing will not be supported with the current design specifications. HydroChem will also be responsible for updating the raw payroll records in RS2 through the Intellinet-provided interface.

#	Assumptions/Questions	Comments	HydroChem Approval	Intellinet Approval
AC1	RS v2.0 functionality is completed and satisfies the functional and performance requirements agreed to by Intellinet and HydroChem			
AC2	RS v2.0 Product/Version Signoff milestone has been fulfilled, and quality metrics are within SLA tolerances agreed to by Intellinet and Hydrochem. The acceptable quality benchmarks that will indicate Product/Version Complete are 0 Blocking, 10 Critical, 100 High, unbounded Medium or Low defects.			
AC3	RS v2.0 documentation deliverables agreed to by Intellinet and HydroChem have been completed, signed off on and transitioned to HydroChem. These documents are: * List of online help "hooks" * Tablet, Branch and Corporate Deployment/Upgrade Documentation * Sync Recover - How to recover from sync impacts from potential conflicts in different parts of the system * Entity Relationship Diagrams * Operational Documentation (Subscriptions, Logging, Security roles) * Business Rule Inventory * Code Generation Knowledge Transfer Each of these documents is estimated to be 10 - 15 pages in length.			
AC4	RS v2.0 installation files have been delivered to HydroChem			

#	Assumptions/Questions	Comments	HydroChem Approval	Intellinet Approval
PL1	A weekly status report will be submitted by the Intellinet PM to the leadership of HydroChem and Intellinet, and will be reviewed in a weekly project status meeting.			
PL2	The project team will be based in Atlanta or offshore, working from Intellinet's facilities.			
PL3	Intellinet will be responsible for resourcing and managing each production and testing role on the project, outside of UAT and Beta facilitators and participants			
PL4	It is understood that certain team members (PM/Architect/DEV Team Lead) will be needed from time to time to travel to HydroChem (HOUSTON) or Intellinet (Atlanta) for key meetings. Intellinet will bill all travel expenses to HydroChem separately from the fixed fee arrangement. Intellinet will be responsible for making travel arrangements. Expenses for travel and lodging will be billed at actual rates. Meals and incidental expenses (M&IE) and mileage will be billed according to the current GSA schedule M&IE per diem and mileage rates posted at http://www.gsa.gov, at the time of the incurred expense.			
PL5	Intellinet will be responsible for maintaining all source code in its managed TFS environment, and will transition ownership/storage of source code to HydroChem upon Product/Version Signoff milestone			
PL6	Intellinet will operate exclusively from the jointly signed/approved functional and non-functional requirements documents. Any requests that are not clearly outlined within these approved requirements will be documented by the HydroChem project liason and presented to the Intellinet PM, who will work with the project team to prepare a change request that will be submitted to the HydroChem and Intellinet Executive Steering Committee for approval and authorization of additional time/cost to implement.			

#	Assumptions/Questions	Comments	HydroChem Approval	Intellinet Approval
PL7	Intellinet and Hydrochem have opted to employ the concept of "Allowances" of hours within the Fixed-Fee contract to be used to cover specific functional requirements that (at the time of structuring the Fixed-Fee contract) lack sufficient clarity to estimate with precision - but cannot be fleshed out in a timeframe that works toward finalizing the Fixed-Fee contract. These defined allowances of time are linked to the development categories in the signed/approved Functional Requirements specification as follows: Invoicing - 359 hours Payroll - 94 hours Admin - 71 hours Reports - 40 hours Infrastructure- 188 hours B2B/EDI Ext.- 60 hours These hours may not be exceeded. Any requirement clarifications or changes that are surfaced from 7/16/09 forward (on these items which have "allowances" defined - that result in effort estimates that exceed these defined allowances) will result in a change control document that the Intellinet PM will prepare and submit to Hydrochem's executive team for consideration and approval.			

#	Assumptions/Questions	Comments	HydroChem Approval	Intellinet Approval
RDW1	Intellinet will provide the overall SSRS reporting architecture and underlying data warehouse to support canned and ad-hoc reporting defined by approved requirements.			
RDW2	How many reports (specifically **list** WHICH reports) does HydroChem need for Intellinet to include in the delivery scope of RS v2.0?	No lists have been generated, so Intellinet has included 490 hours of time for generating the Invoice reports needed to print invoices and any unused hours will be for supporting HydroChem in their reporting efforts.		
RDW3	Upon specifying which reports Intellinet needs to produce, HydroChem will provide Intellinet with printed examples or mock-ups of each report for estimating purposes by 07/02.			
RDW4	HydroChem will be responsible for producing all other reports outside of those specified above, in a timeframe consistent with HydroChem's business needs, but not on critical path for project success.			
RDW5	OLAP cubes are not within scope of this proposal.			

#	Assumptions/Questions	Comments	HydroChem Approval	Intellinet Approval
NFR1	Intellinet will provide auditing tables in the transactional database that track all actions taken to create, update, or delete data. Intellinet will not be responsible for creating reports to extract auditing information from the transactional database.			
NFR2	Intellinet will provide logging capability from the Remote System 2.0 to provide operations with information should the application fail. Intellinet will not be responsible for troubleshooting procedures or log messages.			
NFR3	Active Directory will be used to manage roles for the branch. On the tablet, no role-based security is possible due to the disconnected nature of the devices. Role-based security will be used in the Remote System 2.0 application to restrict invoicing, payroll, and administration to the appropriate Active Directory user groups.			
NFR4	Intellinet is responsible for defining the necessary Active Directory groups. HydroChem is responsible for creating the AD groups to be mapped to application roles. Intellinet is responsible for mapping those groups to appropriate application roles.	To be approved by Mark Horony		
NFR5	Hydrochem is responsible for validating that the appropriate user groups are assigned the appropriate responsibilities and that the appropriate individuals are assigned to those groups.			
NFR6	To support testing, Intellinet requires representative sample data from the HydroChem legacy systems. As part of the data warehousing effort, ETL data loads will be implemented to allow Intellinet to retrieve valid test data from the HydroChem CARS SQL Server and from the Oracle database. HydroChem will provide Intellinet access to the required databases for data load activities.			
NFR7	Intellinet will provide 10 data export files from BizTalk based on HydroChem requirements. -HydroChem is responsible for providing sample formats and coordinating test of exports to external trading partners. Intellinet will not perform any transmissions.			

#	Assumptions/Questions	Comments	HydroChem Approval	Intellinet Approval
FQA1	Intellinet will be responsible for providing test environments for integration and performance/load testing.			
FQA2	Intellinet will perform DEV unit testing, integration testing via manual test scripts written that will be based on the defined user/system actions, as well as perform load, performance and concurrency testing to ensure the application performs to specification provided by functional and non-functional requirements			
FQA3	Intellinet will have ownership of and provide reports/results to Hydrochem on all testing performed, outside of User Acceptance Testing and Beta Testing			
FQA4	Intellinet will provide User Acceptance Testing scripts for Hydrochem to follow, based entirely on the requirements (defined user/system actions) signed off on by Intellinet and HydroChem			
FQA5	Hydrochem will perform and complete User Acceptance testing within 2 weeks after "code complete" milestone, prior to releasing the product to Beta - following the UAT scripts that Intellinet provides, based entirely on requirements agreed to by Intellinet and HydroChem; reporting defects vs. requirements as soon as they are discovered, for team review and remediation.			
FQA6	Hydrochem will facilitate Beta testing with one branch within 1 week after the delivery of beta release. Beta testing will include no less than 3 tablets within the branch, and is expected to run for two to three consecutive calendar weeks. Beta testers will report defects in detailed, reproducible form as soon as they are discovered. Defects related to requirements will be prioritized by the triage team and fixed on a priority basis. Feature suggestions and defects which are not related to requirements are outside the scope of this project.			
FQA7	Hydrochem will provide Intellinet with ten (10) Tablets for testing the different existing hardware configurations. These tablets will include up to 3 different versions representing each type of Tablet used in the field.			
FQA8	Hydrochem will provide timely replacements and support for Tablets provided for testing.			

#	Assumptions/Questions	Comments	HydroChem Approval	Intellinet Approval
FQA9	Hydrochem will be responsible for providing their own Internal test environment for UAT/Staging/Beta/etc…			

#	Assumptions/Questions	Comments	HydroChem Approval	Intellinet Approval
PCT1	Intellinet will perform concurrency and performance testing to ensure system performance requirements (to be specified below) are satisfied.			
PCT2	The Tablet application will initiate to ready state within 30 seconds of launch on the latest commercially available Microsoft OS for the latest available tablet.			
PCT3	The Branch application will initiate to ready state within 20 seconds of launch on the latest commercially available Microsoft OS on the latest available Branch desktop.			
PCT4	The Tablet application will sync the required data in 2 minutes or less. Based on the expected data at the Freeport branch, the required data for the Tablet application's sync measurement will be: * 2 Shift Summaries for upload to the corporate system (average Shift Summary is 8-10 lines) * 30 - 40 Shift Summaries or Jobs for download from the corporate system. (NOTE: If Tablet sync performance does not meet the 2 minute requirement, the first performance improvement will likely be to sync Jobs but not their corresponding Shift Summaries. Joe mentioned that this is the same approach that the Aqua Logic tablet uses)			
PCT5	A "Save" operation of an edited record will complete within 5 seconds on the Tablet application.			
PCT6	A "Save" operation of an edited record will complete within 5 seconds on the Branch application.			
PCT7	All application performance metrics assume fully booted and ready base operating system and services			
PCT8	Unless otherwise noted, performance test will be performed on the lowest grade Tablet and Branch hardware			
PCT9	Unless otherwise noted, performance test will be performed on 10 Mbps ethernet network.			
PCT10	Performance tests may use averaging, extrapolation, etc. where applicable	For example, it isn't a reasonable time expense to measure each individual save operation.		

#	Assumptions/Questions	Comments	HydroChem Approval	Intellinet Approval
TD1	Intellinet will provide a WiX installation package for the Branch and Tablet applications and for the Synchronization function for the Branch. Deployment will be HydroChem's responsibility.			
TD2	All installations will be HydroChem's responsibility.			
TD3	HydroChem will be responsible for all Training and Branch/Tablet Roll-out documentation.			
TD4	Intellinet will provide one week (40 hours) of Train the Trainer time to walk the designated Trainers through the Tablet and Branch systems as well as the Synchronization process on an environment set up by HydroChem.			
TD5	All documentation not listed is outside of scope and will be HydroChem's responsibility. Unless otherwise noted, all documents are limited to 20 pages in length.			
TD6	Intellinet will assume that the Beta test will be conducted in parallel with existing system			
TD7	Intellinet will not be providing support for integration with production systems for the purpose of Beta			

#	Assumptions/Questions	Comments	HydroChem Approval	Intellinet Approval
HS1	Tablet Hardware/Software Specs			
		Xplore Technologies iX104C2V AllVue Tablet: Microsoft Windows® XP Tablet PC edition Intel® Pentium M 733 (1.1 GHz) processor 10.4 XGA transmissive Indoor-Outdoor readable display 40GB HDD 512MB DDR RAM 4500 mAh Battery		
		Xplore Technologies ix104 Rugged Tablet computer Microsoft Windows® XP Tablet PC edition Intel® Pentium III 866 MHz processor 10.4 XGA transmissive Indoor-Outdoor readable display 512 MB RAM 40GB Hard Drive 9000 mAh battery		
HS2	Branch Hardware/Software Specs	Precision 390 Intel Core 2 CPU 1.86 GHZ 2 80GB mirrored drives 2GB of memory Nvidia Quadro VNVS 285 video card Broadcom NetXtreme 57xx Gigabit Network card Windows Vista Business DVD burner 19” monitor Fire wire		

		PC Anywhere
		Office 2007 and Access 97
		Basic remote load
		Primary has PC Backup installed
		Cars
		Most have Users rights
HS3	Corp Hardware/Software Specs	Requirements reviewed with Mark
HS4	Testing Env Specs - and who owns	Given to Mark Horony.
HS5	USB generation	USB 1.0

Builds		HydroChem Acceptance	Intellinet Acceptance
QA Build	Build quality meets threshold for use in QA process		
	Threshold defined by code successful built and passes defined % of development tests		
	Threshold increases over project lifetime (i.e., % level increases)		
Production-Ready Build	Meets a pre-defined defect matrix (0 Blocking, 10 Critical, 100 High, unbounded Medium or Low)		
	Defect matrices may increase stringency over project lifetime; they will not decrease		
	Development team "claims" build is ready for Production		
Beta / Release Build	A particular Production-Ready build which QA has verified to meet the defined quality threshold		
Code Complete	All required features, functionalities and unit tests have been implemented by the development team		

Bug Severities		HydroChem Acceptance	Intellinet Acceptance
Blocking	Major portions of functionality are blocked. (e.g., CRUD actions cannot be completed)		
	The issue blocks QA from testing the functionality		
	A business user/role is completely impeded from any productive work with the system		
	After Code Complete, bugs may only be promoted to Critical by Triage Team		
	Must be addressed before testing can continue		
Critical	Although many portions of a functionality work, a particular area does not work correctly		
	The issues blocks a substantial amount of QA testing ability		
	A business user/roles is impeded in a limited fashion		
	After Code Complete, this is the highest Severity level users may assign		
	Should be addressed before code delivery to production for release		
High	A particular piece of functionality works, but should be improved or doesn't meet requirements		
	QA testing is inconvenienced, but is not blocked		
	A business user/role may be inconvenienced, but is not significantly impeded due to workarounds available		
	This is the default severity for new bugs		
	Should be addressed before code delivery to production for release		
Medium	A particular piece of functionality works, but could be improved		
	Issues at this level are more likely to be change requests than divergence from requirements		
	Issues at this level may be for tracking purposes to be included in future product versions		
	A business user/role is not significantly inconvenienced, but experience could be improved (e.g. UI spacing and layout)		
	Can be fixed in patch after code delivery to production		
Low	Issues at this level are "Nice to Have's"		
	Issues at this level are almost always change requests relative to requirements		
	Issues at this level are predominantly for tracking purposes and may be promoted for future product versions		

Milestones		HydroChem Acceptance	Intellinet Acceptance
Requirements Complete	All requirements have been gathered and documented for this Product/Version		
Requirements Sign-off	Authorized client personnel sign-off on requirements		
Design Complete	Development team has completed design aspect for feature		
Code Complete	Development team has implemented all features and functionalities defined by Requirements Includes product code and development tests		
QA Complete	QA has completed appropriate tests		
QA Sign-off	QA sign-off is typical for moving forward to Product/Version Complete		
UAT Complete	User Acceptance Testing has been executed successfully		
Beta Complete	Beta process has been executed successfully		
Product/Version Complete	Product or Version has been shown to meet requirements and quality metrics		
Product/Version Sign-off	Authorized client personnel sign-off on Product/Version		
Product/Version Code Delivery	All Product or Version code has been delivered to client. Client takes ownership of code, Product or Version, associated maintenance and upkeep, etc.		

Triage		HydroChem Acceptance	Intellinet Acceptance
Team	Comprised of key personnel authorized to make decisions regarding product features, trade-offs, etc.		
Purpose	To determine what is "in" or "out" with regard to fixing bugs		
Operation	Triage team meets with increasing frequency to review, analyze and make plans for incoming and current issues		

Target Date	Milestone	Component (opt)	Comments	HydroChem Approval	Intellinet Approval
7/8/2008	Code Complete	Tablet	Tablet Code Complete met on 7/7/09; build delivered to HC QA on 7/8/09.		
7/16/2009	QA Complete	Tablet			
7/22/2009	QA Sign-off	Tablet			
	Product/Version Complete	Tablet			
	Product/Version Code Delivery	Tablet			
	Product/Version Sign-off	Tablet			
	Functional Punch-list Review		Completed 7/6/9		
	Non-Functional Punch-list Review		Completed 7/6/10		
	Wireframes Review		Completed 7/6/11		
7/13/2009	Functional Punch-list Sign-off				
7/13/2009	Non-Functional Punch-list Sign-off				
7/13/2009	Wireframes Sign-off				
7/14/2009	Deliver Fixed-Bid Proposal				
	Off-Shore Design Document Hand-Off				
	QA Methodology Complete	Branch, Corp			
	QA Specifications Complete	Branch			
	QA Specifications Complete	Corp			
multiple	QA Builds	Branch, Corp	deliver builds to QA, QA results, bug-fixes, repeat		
	Code Complete	Branch			
	Code Complete	Corp			
	Code Complete Sign-off	Branch, Corp			
multiple	QA Builds	Branch, Corp	deliver builds to QA, QA results, triage bugs, bug-fixes, repeat		
	QA Complete	Branch			
	QA Complete	Corp			
	QA Complete Sign-off	Branch, Corp			
	Beta-Ready Builds	Branch, Corp, Tablet			
	Beta Begins	Branch, Corp, Tablet			
	Beta Complete	Branch, Corp, Tablet	Beta process overlaps QA		
	Product/Version Complete	Branch, Corp			
	Product/Version Code Delivery	Branch, Corp			
	Product/Version Sign-off	Branch, Corp			

Dates TBD based on project planning
Milestones are suggested and in suggested order; changes may occur as part of project planning

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Inbox Queue

I would like filter on: Customer Site Number Customer Number Go

0001001 - Alpha Petroleum Corporation
4400 La Porte Highway
Pasadena, TX 77901
Payment Authorization:
PO1234567890
Job: 123-456

Invoice

0003008 - Beta Chemicals
1000 Dallas Street
Webster, TX 77011
Payment Authorization:
No Authorization Required
Job: 12345, 23456, 34567

0005005 - Boy-O Incorporated
1000 Dallas Street
Webster, TX 77011
Payment Authorization:
Credit Card
Job: 123-454567, 234-562345..

0006001 - Calph Petro Corp
101 Rich Lane
Houston, TX 70101
Payment Authorization:
234-XXX-098
Job: 123-454567, 234-562345..

0010002 - Pheta Chemicals Inc.
100 Pheta Way
Houston, TX 70100
Payment Authorization:
PO098765432
Job: 123-454567, 234-562345

Invoice Queue

I would like filter on: Creation Date From to Go Create New Invoice

Alpha Petroleum Corporation
Invoice LTX012345
PO 12456790
07/20/2008
Open:
Invoice
Needs Review

Beta Chemicals
Invoice 234567
PO BET123456
07/25/2008
Open:
Invoice
Credit
Re-invoice

Boy-O Incorporated
Invoice 345678
PO TX3489023
07/25/2008
Open:
Invoice
Credit

Calph Petro Corp
Invoice 444456
PO SE180046
07/20/2008
Open:
Invoice
Needs Review

Pheta Chemicals Inc.
Invoice 456767
PO PCI007
07/25/2008
Open:
Invoice
Credit
Re-invoice

Job Queue

-1 Year -3 Months This Week +3 Months +1 Year Create New Job

Alpha Petroleum Corporation
Job: 123-456789
PO: 12345678, 89012345
Shift: 12345, 23456, 34567
Start On:
1/17/2009 9:00 AM
Needs Signature

Beta Chemicals
Job: 123-456789
PO: 12345678, 89012345
Shift: 12345, 23456, 34567
Start On:
1/17/2009 9:00 AM

Boy-O Incorporated
Job: 123-456789
PO: 12345678, 89012345
Shift: 12345, 23456, 34567
Start On:
1/17/2009 9:00 AM

Payroll Queue

Create New Payroll

This Week
Confirmed: 37
Unconfirmed: 0
August 18 – August 26

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Open ▾ | Print | New ▾ | Clone ▾ | Hide Indirect Customer | Delete | Invoice | Payroll | Note

Alpha Petroleum Corporation – 123-4567890

Created by John Smith on 07/10/08 at 8:30 AM CST

Complete

Add Shift

Monday Shift 2 «
Start:
07/13/08 12:00 PM CST
Stop:
07/14/08 12:00 AM CST
Chemical Cleaning -CC
12:00PM-12:00AM : E
Add Service

Monday Shift 1 «
Chemical Cleaning -CC
12:00AM-12:00PM : O
Add Service

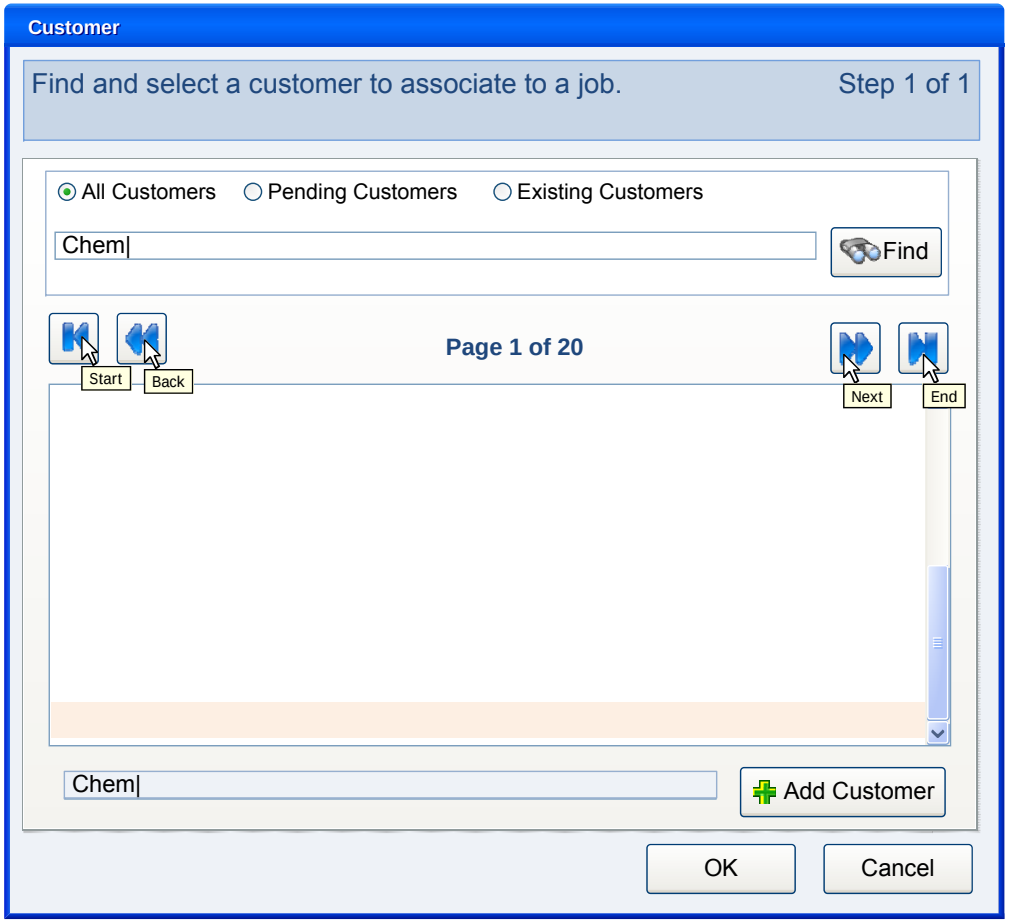
Branch	000101 – LaPorte, TX
Customer	Alpha Petroleum Corporation
Job #	123-4567890 (Generate New)
Indirect Customer	Alpha Petroleum Corporation
Service Category	Daily Maintenance Service
Service Line	Chemical Cleaning - CC
Job Description	
Customer Rep	
Customer Area	Refinery X
Customer Unit	Building Y
Customer Equipment	SohoTank
Payment Authorization	Multiple purchase orders selected
Call in Date & Time	07/10/2008 08:00 AM
Arrival Date & Time	
Job Start Date Time	07/13/2008 11:00 AM
Custom Label 1	
Custom Label 2	

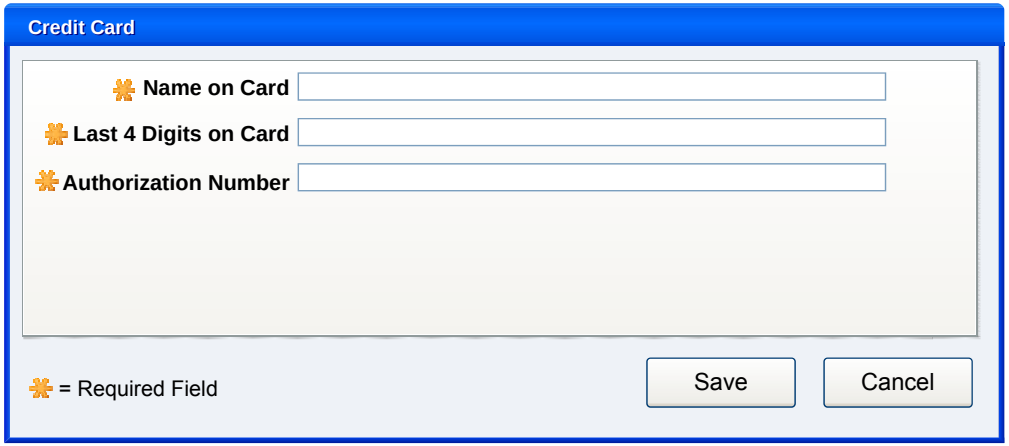
Required Field. Enter in a valid

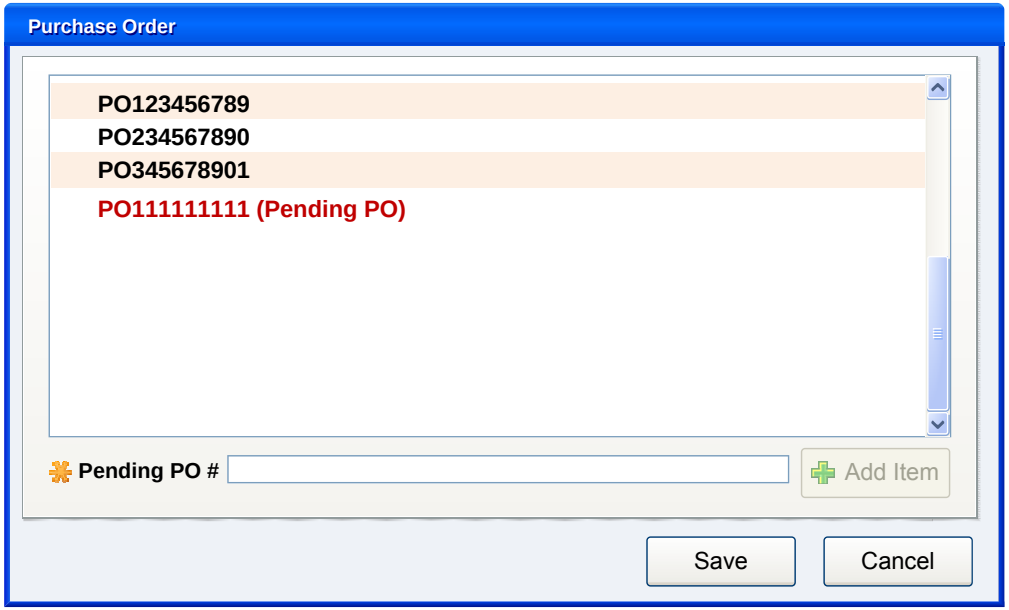
Benchmark

Job Type	
Side Cleaned	
Schedule Code	
Cleaning Criteria	
Fouling Factor	
Hardness Factor	
Number of Workstations	
Job Estimate	

☐ Turnaround Job ☐ Complaint ☐ Out of Scope


Customer
Find and select a customer to associate to a job.
Step 1 of 1
All Customers
Pending Customers
Existing Customers
Chem
Find
Start
Back
Page 1 of 20
Next
End
Chem
Add Customer
OK
Cancel


Credit Card
Name on Card
Last 4 Digits on Card
Authorization Number
= Required Field
Save
Cancel


Purchase Order
PO123456789
PO234567890
PO345678901
PO111111111 (Pending PO)
Pending PO #
Add Item
Save
Cancel

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Open ▾ | Print | New ▾ | Hide Indirect Customer | Delete | Note | Delete Service

Alpha Petroleum Corporation, Refinery X

Complete

07.08.09 – Shift Deletes require a Note.

Add Shift

Monday Shift 2 »
Start:
07/13/08 12:00 PM CST
Stop:
07/14/08 12:00 AM CST
Chemical Cleaning -CC
12:00PM-12:00AM : E
Add Service

Monday Shift 1 «
Chemical Cleaning -CC
12:00AM-12:00PM : O
Add Service

Return to Job

Equipment & Labor | Aux. Equipment/Materials | Delays | Summary Approval

Shift # 00001
Branch 000101 – LaPorte, TX
Shift Start Date & Time 07/10/2008 08:00 AM
Shift Stop Date & Time
Service Type Chemical Cleaning - CC

= Required Field

Add Equipment | Add Labor

☑	Role	Name	Start	Stop	Lunch	Edit	Delete
☑	Primary Equipment	Center Pump Diesel 0-300 GMP 30017	07/15 11:00 AM	07/15 12:00 PM	✓		
☑	Chem Service Supervisor	Fields, Ronald 236348	07/15 11:00 AM	07/15 12:00 PM	✓		
☑	Chemist	Applegate, Thomas 839012	07/15 11:00 AM	07/15 12:00 PM	✓		
☑	Equipment Technician	Alaniz, Ross 290416	07/15 11:00 AM	07/15 12:00 PM	✓		
☑	Field Supervisor	Turner, Joseph 657894	07/15 11:00 AM	07/15 12:00 PM	✓		
☑	Safety Supervisor	Smith, John (Pending Employee)	07/15 11:00 AM	07/15 12:00 PM	✓		
☐	Labor Contract						

07.08.09 – Labo
have been ente
line.

If Shift is closed
associated with
show a messag
"Gate Log recor
on this shift. Re
all gate logs." O

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Home | Jobs | Invoice | Payroll | Reports | Adminstration

Open ▾ | Print | New ▾ | Delete | Note | Add Line

Customer PO 123456789
Show All
From 01/01/2009 To 02/01

Staging

- Job Number: 12345
  - Shift Number: 00
    - Equipment Ty
      - Descript
      - Descript
      - Descrip
      - Descrip
      - HB020003 Sdp QTY: 10.5 hrs. Unit Price: $37 Extension: $36 Discount: Net Extension:
    - Lab
    - Mat
  - Shift Number: 1
- Job Number: 45746
  - Shift Number: 22
  - Shift Number: 33

LTX0123456 | LTX0123456-C | LTX0123456-CR | LTX0123456-RE

ATTN: Accounts Payable
Alpha Petroleum Corporation
P.O. Box 600
Pasadena, TX 77901

Thank You. We appreciate your business.

Questions about this invoice? Call John Smith at 1-800-HYDROCHEM.

Amount Due **$3,069.17**

Warning: Amount is more than 85% of Purchase Order amount

Collapse Expand Button will hide/ show the header.

Terms: **Net 30**
Payment Type: **1234567890**
Reference Number:

Error: Defined value does not match

SES Number:

Invoice: **BTX0123456**
Date: **08/15/2008**

Branch: **00101 LaPorte, TX**
Contract: **02716-CSA**
Apply to: **LTX0123456**

Description	Total
HB002001 - Labor Technician - John Smith	$120.00
CC020002 - Circulator 1001-1500 Gal	$250.00
HB300001 - Cleaning Truck	$800.00
HB002002 - Crew Leader - Kevin Jones	$150.00
CC020002 - Circulator 1001-1500 Gal	$250.00
HB040088 - Crew Package	$1,200.00
HB040077 - Cleaning Crew Package	$1,200.00
My New Grouping	$520.00

Remit payment to:
HydroChem
P.O. Box 644676
Dallas, TX76264-4676

Federal tax ID: 75-2503906

Sub-total:	**$2,569.17**
Discount:	**$0.00**
Tax:	**$0.00**
Total:	**$2,569.17**

Additional Notes and Comments to be printed with the invoice

452 characters remaining

Manager Approval

Display at 75%

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Home | Jobs | **Invoice** | Payroll | Reports | Adminstration

Customer PO 1234567890

Show All

From 01/01/2009 To 02/01/2009

Staging

- Job Number: 123456
  - Shift Number: 0011-00259
    - Equipment Type
      - Description
      - Description
      - Description
      - Description
      - Description
    - Labor Ty
    - Materials T — Staging Area Unavailable
  - Shift Number: 1111-00259
- Job Number: 45746574
  - Shift Number: 222-00259
  - Shift Number: 333-00259

Move Selected to Invoice »

LTX0123456-CR

ATTN: Accounts Payable
Alpha Petroleum Corporation
P.O. Box 600
Pasadena, TX 77901

Thank You. We appreciate your business.

Questions about this invoice? Call John Smith at 1-800-HYDROCHEM.

Amount Due **$3,069.17**

Warning: Amount is more than 85% of Purchase

Collapse Expand Button will hide/ show the header.

Terms: **Net 30**
Payment Type: **1234567890**
Reference Number:

Error: Defined value does not match

SES Number:

Invoice: **BTX0123456**
Date: **08/15/2008**

Branch: **00101 LaPorte, TX**
Contract: **02716-CSA**
Apply to: **LTX0123456**

Work Order: **0011-00259** Start Date: **08/10/2008** Completion Date: **08/10/2008**

Description	Total
HB002001 - Labor Technician - John Smith	$120.00
CC020002 - Circulator 1001-1500 Gal	$250.00
HB300001 - Cleaning Truck	$800.00
HB002002 - Crew Leader - Kevin Jones	$150.00
CC020002 - Circulator 1001-1500 Gal	$250.00
HB040088 - Crew Package	$1,200.00
HB040077 - Cleaning Crew Package	$1,200.00
My New Grouping	$520.00
Sub-total:	**- $2,569.17**
Discount:	**$0.00**
Tax:	**$0.00**
Total:	**- $2,569.17**

Additional Notes and Comments to be printed with the invoice

452 characters remaining

06.10.09 - Upon creation of each new Credit Invoice and Re-Invoice, set the Contract Level to the Contract Level of the Source Invoice.

7.8.09 - Credit Invoice will Show a Popup to display 3 options. 1) mark as Lost revenue with Reason, 2) Credit and Move items back to staging with Reason, 3) Credit and re-bill with a option to enter in the expected re-bill amount with Reason.

Manager Approval

Display at **75%**

06.1 Invo Sub Inst Pen

06.17. Invoic create Invoic Descri the so each t each C Invoic

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Home | Jobs | Invoice | Payroll | Reports | Adminstration

Open ▾ | Print | New ▾ | Delete | Note

Customer PO 1234567890

Show All

From 01/01/2009 To 02/01/2009

Staging

- Job Number: 123456
  - Shift Number: 0011-00259
    - Equipment Type
      - Description
      - Description
      - Description
      - Description
      - Description
    - Labor Type
    - Materials Type
  - Shift Number: 1111-00259
- Job Number: 45746574
  - Shift Number: 222-00259
  - Shift Number: 333-00259

Staging Area Unavailable

Move Selected to Invoice »

LTX0123456 | LTX0123456-CU | LTX0123456-CR | LTX0123456-RE

ATTN: Accounts Payable
Alpha Petroleum Corporation
P.O. Box 600
Pasadena, TX 77901

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Amount Due **$3,069.17**

Warning: Amount is more than 85% of Purchase

Terms: **Net 30**
Payment Type: **1234567890**
Reference Number:

SSE Number:

Error: Defined value does not match

Invoice: **BTX0123456**
Date: **08/15/2008**

Branch: **00101 LaPorte, TX**
Contract: **02716-CSA**
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Discount:	**$0.00**
Tax:	**$0.00**
Total:	**$2,569.17**

Additional Notes and Comments to be printed with the invoice

452 characters remaining

06.10.09 - Upon creation of each new Credit Invoice and Re-Invoice, set the Contract Level to the Contract Level of the Source Invoice.

Manager Approval

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Notes

06/01/09 Note De

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06.17.09 - If a us
an Invoice with a
create a Custom
Invoice, and set t
Description of ea
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each to the Dolla
Line Item of the s

07.06.2009 -
all formats su

Display at **75%**

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Open ▾ Print

« » **Week of Mon, August 1, 2008 – Sun, August 7, 2008**

Last Name	First Name	Employee ID	Home Branch	Employee Type	Total Hours	Regular Hrs	OT Hrs	DT Hrs	Edit
Alverez	Hector	12345678	00101	FT	24:00	24:00	0:00	0:00	
Brett	George	78902311	00105	PT	40:00	40:00	0:00	0:00	
Columbus	George	67891034	00101	FT	40:50	40:00	0:50	0:00	
Daniels	Jennifer	30138725	00101	FT	44:00	40:00	4:00	0:00	
Dapplegate	Joe	34567828	00101	FT	44:00	40:00	4:00	0:00	
Fall	Ralph	56789029	00101	FT	26:00	26:00	0:00	0:00	
Flight	Jeff	67890151	00101	FT	44:00	40:00	4:00	0:00	
Glueth	Victor	47019030	00101	FT	40:00	40:00	0:00	0:00	
Hooth	Samuel	78901222	00101	FT	40:00	40:00	0:00	0:00	
Karter	Gary	56789115	00101	FT	40:00	40:00	0:00	0:00	
Kartwright	Fred	18920357	00101	FT	40:00	40:00	0:00	0:00	
Kartwright	Joan	28390169	00101	FT	40:00	40:00	0:00	0:00	

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Home | Jobs | Invoice | Payroll | Reports | Adminstration

Open ▾ | Print | Approve

Back to Payroll

« » **Alverez, Hector - 456789**

Add Time

Date	Record Type	Pay Type	Job #	Shift #	Hours	Home Branch	Input Branch	Edit	Delete
Monday 08/01/2008	Automatic	BT	123-45678	1234-0001	4:00	00101	00101		
Monday 08/01/2008	Automatic	BT	123-45678	1234-0002	4:00	00101	00101		

Standard-Time	8.0 hours
Over-Time	0.0 hours
Double Time	0.0 hours
Total Time	**8.0 hours**

Date	Record Type	Pay Type	Job #	Shift #	Hours	Home Branch	Input Branch	Edit	Delete
Tuesday 08/02/2008	Automatic	BT	123-45679	1235-0001	4:00	00101	00101		
Tuesday 08/02/2008	Automatic	BT	123-45679	1235-0002	4:00	00101	00101		

Standard-Time	8.0 hours
Over-Time	0.0 hours
Double Time	0.0 hours
Total Time	**8.0 hours**

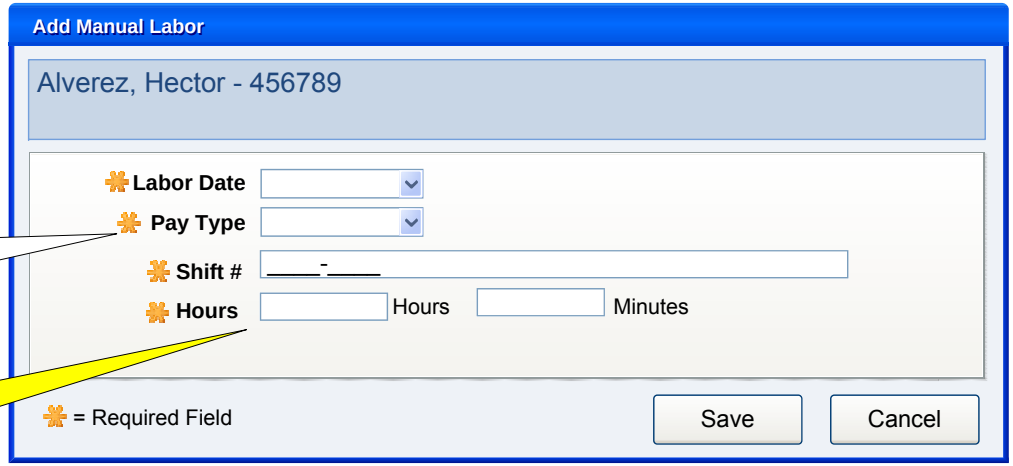
Date	Record Type	Pay Type	Job #	Shift #	Hours	Home Branch	Input Branch	Edit	Delete
Wednesday 08/03/2008	Automatic	BT	123-98765	5467-0001	4:00	00101	00105		
Wednesday 08/03/2008	Manual	BT	123-8765	5467-0002	4:00	00101	00101		

Standard-Time	8.0 hours
Over-Time	0.0 hours
Double Time	0.0 hours
Total Time	**8.0 hours**

07.08.09 - Code and Pay Type can be: Shop Time, regular, etc. (from SOA List) Depending on the Pay Type the Shift # may be hidden.

Format should be "Code – Description"

07.08.09 - We are allowing the entry of negative values.



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I would like to do a: Customer Details Look-up

Search by ◉ Customer ○ Customer Number ○ Job Number ○ Customer Purchase Order

Customer Alph

Alpha Petroleum Corporation

Submit

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I would like to do a: Customer Details Look-up

- Customer Sites »
- Badge Numbers
- Gate Log Reconciliation
- Purchase Orders
- Contracts

Alpha Petroleum Corporation

00001001 – Corporate Headquarters

View Equipment

Bill to Address:
PO Box 12345
Anywhere, TX 12345-6789

Physical Address:
12345 Main Street
Anywhere, TX 12345-6789

00001002 - Alpha Refinery Site

View Equipment

Bill to Address:
PO Box 12345
Anywhere, TX 12345-6789

Physical Address:
678 Dino Road
Anywhere, TX 12345

00001003 - Beta Refinery Site

View Equipment

Bill to Address:
PO Box 12345
Anywhere, TX 12345-6789

Physical Address:
678 Dino Road
Anywhere, TX 12345

00001004 - Delta Refinery Site

View Equipment

Bill to Address:
PO Box 12345
Anywhere, TX 12345-6789

Physical Address:
678 Dino Road
Anywhere, TX 12345

00001005 - Kappa Refinery Site

View Equipment

Bill to Address:
PO Box 12345
Anywhere, TX 12345-6789

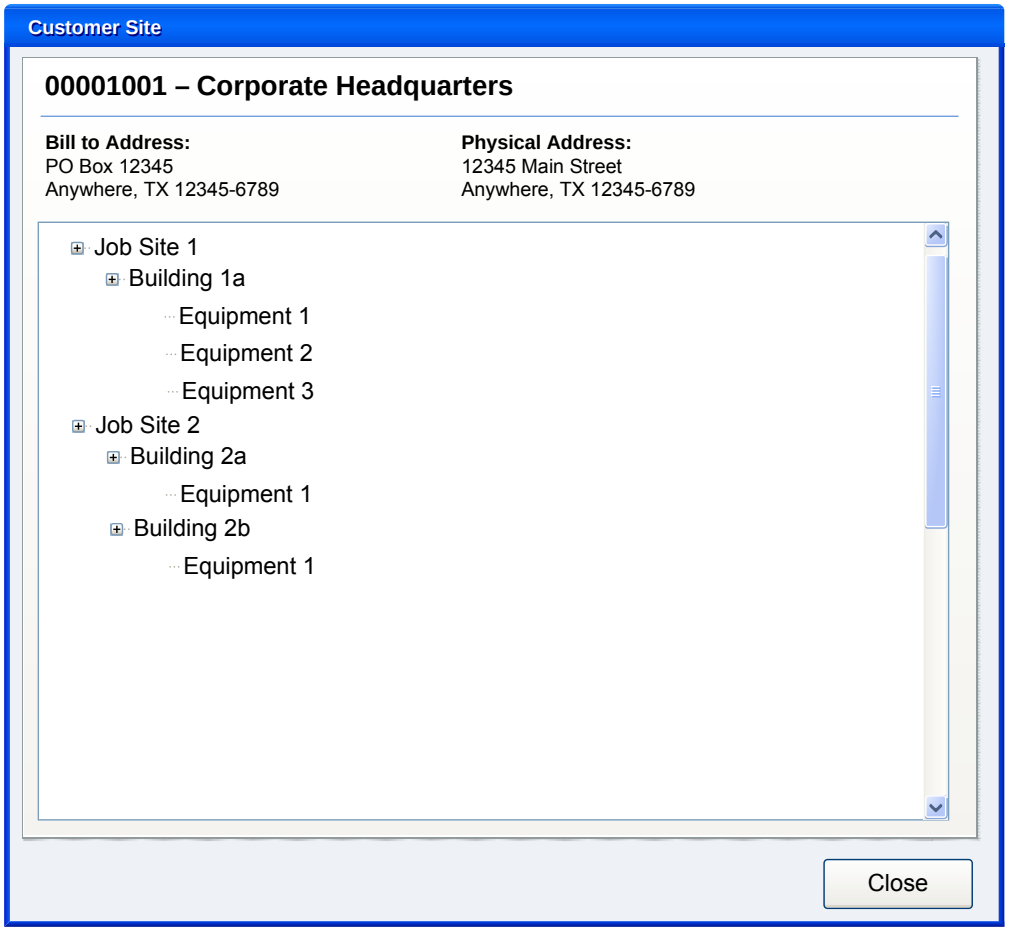
Physical Address:
678 Dino Road
Anywhere, TX 12345

00001006 - Zed Refinery Site

View Equipment

Bill to Address:
PO Box 12345
Anywhere, TX 12345-6789

Physical Address:
678 Dino Road
Anywhere, TX 12345


Customer Site
00001001 – Corporate Headquarters
Bill to Address:
PO Box 12345
Anywhere, TX 12345-6789
Physical Address:
12345 Main Street
Anywhere, TX 12345-6789
Job Site 1
Building 1a
Equipment 1
Equipment 2
Equipment 3
Job Site 2
Building 2a
Equipment 1
Building 2b
Equipment 1
Close

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I would like to do a: Customer Details Look-up

- Customer Sites
- Badge Numbers »
- Gate Log Reconciliation
- Purchase Orders
- Contracts

Badge Numbers

Start Back Page 1 of 20 Next End

Active Status	Badge Number	Branch	Assigned to ▼	Employee/Contractor	Assigned Date	Last Used

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I would like to do a: Customer Details Look-up

- Customer Sites
- Badge Numbers
- Gate Log Reconciliation »
- Purchase Orders
- Contracts

Gate Log Reconciliation

Log Date: 01/16/2009

07.08.09 – Log date Search will return all employees that have worked on this 24 hour period. Default Gate Log Date will be for current day.

Page 1 of 1

Employee ID	Last Name	First Name	Branch	Job #	Shift #	Shift Start	Shift Stop	Total	Gate Log
01234567890	Smith	John	Free Port, TX	123-4567	1234-456	8:00AM	5:00PM	8.5	8.0

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I would like to do a: Customer Details Look-up

- Customer Sites
- Badge Numbers
- Gate Log Reconciliation
- Purchase Orders »
- Contracts

Purchase Orders

Sort by: Issue Date – Descending Order

☑ Show Closed POs

Create Purchase Order

PO Number: **AB123456789** **Issue Date: 12/01/2008** Expiration Date: 11/30/2008 Created By: John Smith

Open | Close

Reference Number: 1234567890
Work Order: CL4689074
Associated Invoices:
Related Jobs:
Amount Available $0.00
Posted Amount $100,000.00
Issue Amount $500,000.00

Line Item 10

Reference Number: 1234567890
Work Order: CL4689074
Associated Invoices:
Related Jobs:
Amount Available $100,000.00
Posted Amount $100,000.00
Issue Amount $500,000.00

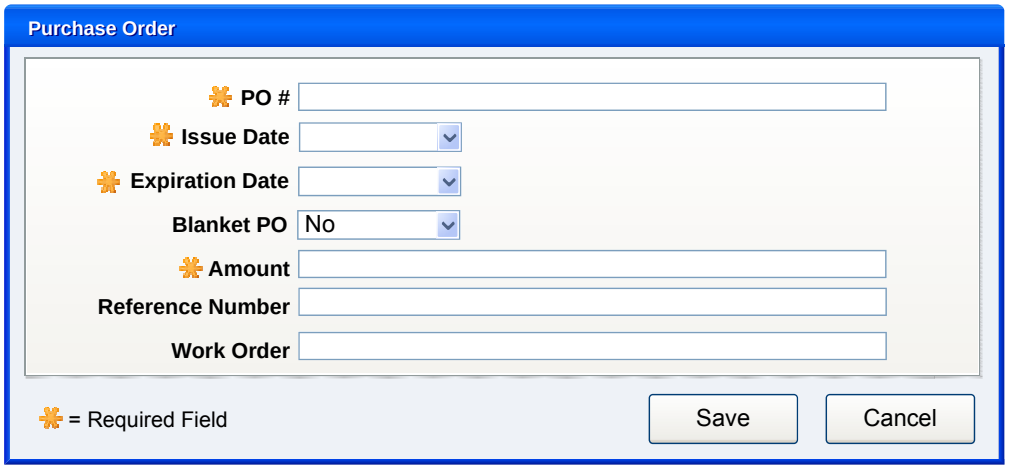
Line Item 20

Reference Number: 1234567890
Work Order: CL4689074
Associated Invoices:
Related Jobs:
Amount Available $0.00
Posted Amount $100,000.00
Issue Amount $500,000.00

Add Line Item

PO Number: BB234567890	**Issue Date: 11/01/2008**	Expiration Date: 10/31/2009	Created By: John Smith
PO Number: CD123456789	**Issue Date: 10/01/2008**	Expiration Date: 09/30/2009	Created By: John Smith
PO Number: CD234567890	**Issue Date: 09/01/2008**	Expiration Date: 08/31/2009	Created By: John Smith
PO Number: EF123456789	**Issue Date: 08/01/2008**	Expiration Date: 07/31/2009	Created By: John Smith
PO Number: EF234567890	**Issue Date: 07/01/2008**	Expiration Date: 06/31/2009	Created By: John Smith

04.20.09 – If Blanket PO is set to “no” then Amount is required. If Blanket PO is marked as “Yes”, then Amount is NOT required.



Custom attributes will pre-populate for Line item level POs, but allow them to change.

PO Line Item

PO Number: **AC123456789** Amount Available: **$250,000**

* **Line Item**

Description

* **Amount**

Reference Number

Work Order

* = Required Field

Save Cancel

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Home | Jobs | Invoice | Payroll | Reports | Adminstration

I would like to do a: Customer Details Look-up

- Customer Sites
- Badge Numbers
- Gate Log Reconciliation
- Purchase Orders
- Contracts »

Contracts

Terms and Conditions: 1234567C **Activation Date: 01/01/2009** **Expiration Date: 01/01/2010**

Agreement Number: 3392 Agreement Period: 02/01/2008 – 02/01/2010

Agreement Number: **3394** Agreement Period: 02/01/2008 – 02/01/2010

Hydroblast Item Code ▼	Description	Bayport, LoneStar, Deer Park N Area Time/Hour	Deer Park Alliance Units Time/Hour
HB010015	Safety Supervisor	$26.50	$25.52
HB020003	SDP – 10,000 – 30 GPM A 234 BHP positive displacement hydroblast unit capable of 0-10,000 PSI	$32.74	$26.28

Chemical Clean Item Code ▼	Description	Bayport, LoneStar, Deer Park N Area Time/Hour	Deer Park Alliance Units Time/Hour
CC060010	Nitrogen Service – first 4 hours Includes nitrogen pump, operator, 100ft. Hose, and 100,000 scf nitrogen	$1,523.37	$1,222.50

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I would like to do a: Branch Office Look-up

Search by ◉ Branch Name ○ Branch Number

Branch Name

Submit

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I would like to do a: Branch Office Look-up

- **Branch Details »**
- Assets
- Contractors
- Employees
- Item Masters

BTX – Baytown, TX

Central Region

Branch Number
00144

Branch Manager:
John Doe

Branch Admin:
Samantha Jones
Richard Price

Physical Address:
12345 Main Street
Anywhere, TX 12345-6789

Phone:
(218) 555-1234

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Home | Jobs | Invoice | Payroll | Reports | Adminstration

I would like to do a: Branch Office Look-up

- Branch Details
- Assets »
- Contractors
- Employees
- Item Masters

Assets

Start Back **Page 1 of 20** Next End

Unit ID ▼	Unit Type	Unit Type Description	Service Line	Service Line Description
00003	PK10	Pickup Truck	020	Hydroblast

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I would like to do a: Branch Office Look-up

- Branch Details
- Assets
- Contractors »
- Employees
- Item Masters

Contractors

Start | Back | Page 1 of 20 | Next | End

Show: All Employees Pending Employees

	Active Status	Employee Name	Employee Number	Shift Summery #	Job #	Branch
☑	Pending	John Smith		3456-789	012-3456	Branch A
☐	Active	Casey Atwood	1234567890	1234-123	123-1234	Branch A

Reconcile Pending Employee

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Home | Jobs | Invoice | Payroll | Reports | Adminstration

I would like to do a: Branch Office Look-up

- Branch Details
- Assets
- Contractors
- Employees »
- Item Masters

Employees

Start | Back | Page 1 of 20 | Next | End

Show: All / Employees / Pending Employees

	Active Status	Employee Name	Employee Number	Shift Summery #	Job #	Branch
☑	Pending	John Smith		3456-789	012-3456	Branch A
☐	Active	Casey Atwood	1234567890	1234-123	123-1234	Branch A

Reconcile Pending Employee

Select an company employee record to reconcile for pending employee John Smith

Branch A

Employees Contractors

Resource

Name	Employee ID
Allen, Tim	020124
Alverez, Jose	349072
Amon, Fred	345678
Ant, Adam	342568
Bass, Curt	849372
Bullard, Jim	698235
Drew, Norman	469835
Murphy, Dale	404578
Phoenix, Steven	234598
Smith, Alex	324897

= Required Field

Save Cancel

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Home | Jobs | Invoice | Payroll | Reports | Adminstration

I would like to do a: Branch Office Look-up

- Branch Details
- Assets »
- Contractors
- Employees
- Item Masters »

Item Masters

Sort by: Item Code – Ascending Order

Item Code: CC020001 Description: Circulator 0-1000 Gal | Category: Equipment | Unit of Measure: Hour | Price: $95.00

Unit Type: CC10 | Unit Identifier: U | Revenue Account: 40310 | Rental Revenue Account: 40510

Tax Category: Service | Cost Account: 52101 | Service Line: 010: Chemical Cleaning

Branch Price $95.00

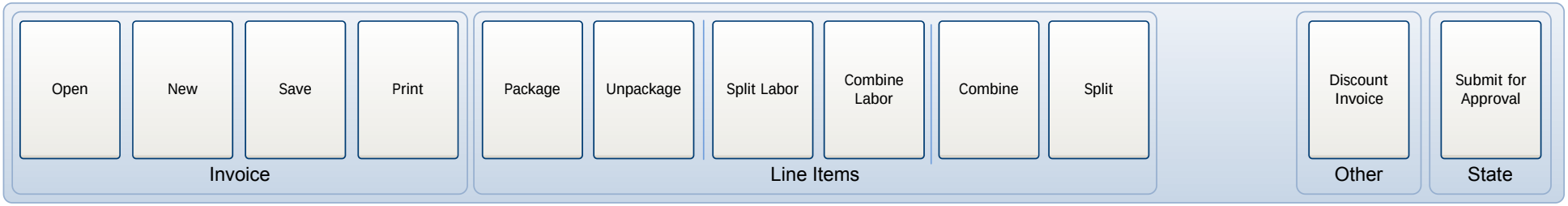
Cost $0.00

CC020002	Circulator 1001-1500 Gal	Equipment	Hour	$125.00
CC020003	Circulator 1501-2000 Gal	Equipment	Hour	$150.00
CC020004	Dual Clng Circ 0-2000 Gal	Equipment	Hour	$0.00
CC020005	Circulator, Hastelloy C	Equipment	Hour	$250.00
CC020006	Clam Mix & Blend System	Equipment	Hour	$75.00
CC020007	Truck Transport 3000-4500 Gal.	Equipment	Hour	$50.00

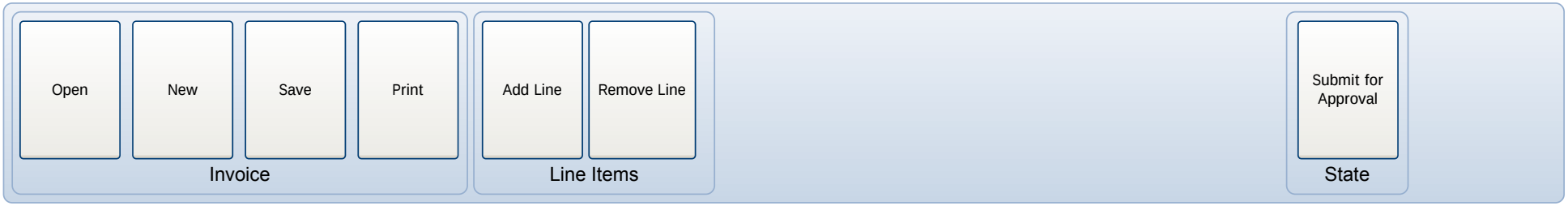
07.06.09 – group and ungroup are available for 2 types of items. 1) 3rd Party Charges 2) Any Item of UoM that Spans a Shift (Example is Primary Equipment).

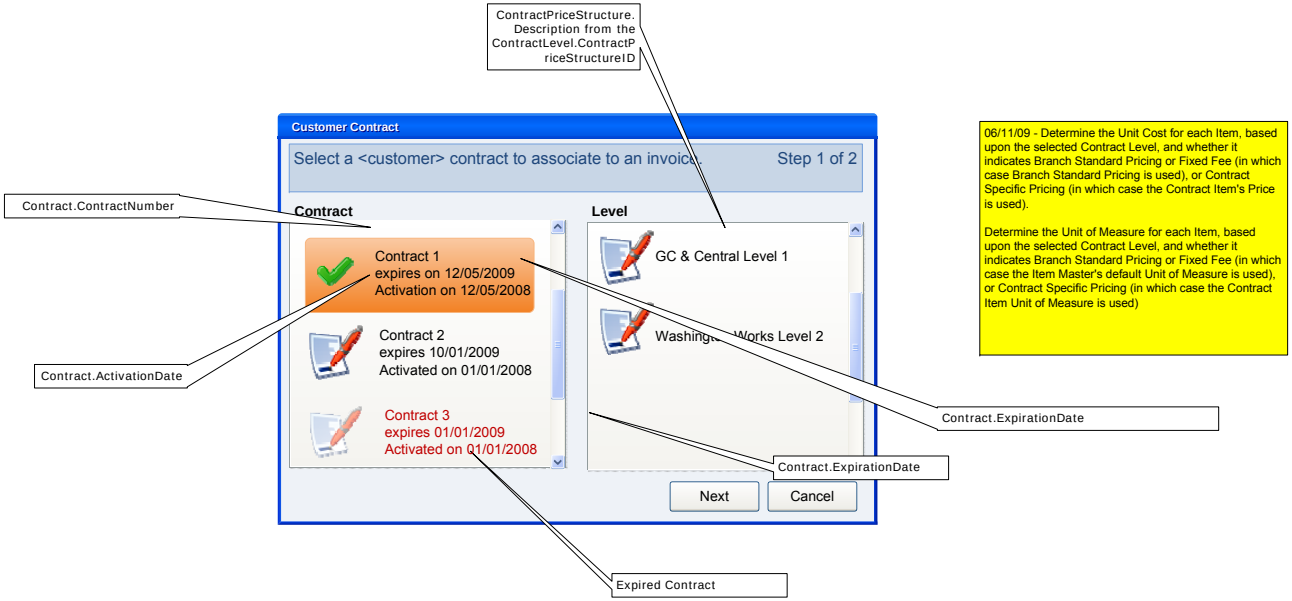
07.08.09 – Discount Entire Invoice will display a Popup to enter in a % value.

Invoice



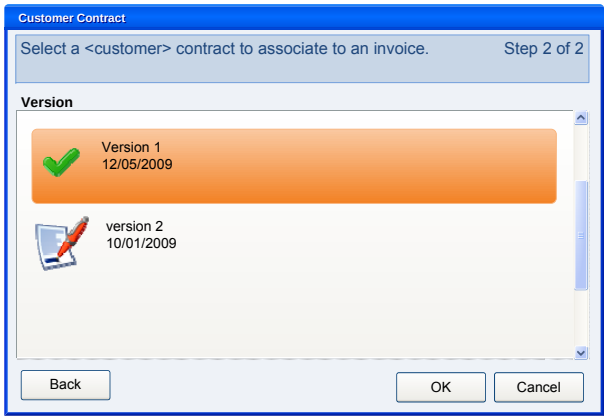
Custom Invoice





06/11/09 - Determine the Unit Cost for each Item, based upon the selected Contract Level, and whether it indicates Branch Standard Pricing or Fixed Fee (in which case Branch Standard Pricing is used), or Contract Specific Pricing (in which case the Contract Item's Price is used).

Determine the Unit of Measure for each Item, based upon the selected Contract Level, and whether it indicates Branch Standard Pricing or Fixed Fee (in which case the Item Master's default Unit of Measure is used), or Contract Specific Pricing (in which case the Contract Item Unit of Measure is used)



7.8.09 – Fixed Fee invoices allow the printing of Custom and Regular Invoices.

0610.09 – Tax override is only available to those customers that do not have a taxed exempt number.

6.10.09 – error button displays the errors that affect the staging area items. Example: Pending Employee.

7.8.09 – Filter to show All items or Just Labor Items

06.10.09 – Invoice tab title will display the unique, unbroken-sequential Invoice Number (i.e., unique to the Branch location where it is created) Invoice number once it is generated.

*For each new (Open) Credit Invoice/ Re-invoice, generate a unique, unbroken-sequential Invoice Number (i.e., unique to the Source Invoice for which it is created). Placing Letter at end plus number.

6.10.09 – if credited an Open invoice (non-posted), then dump items back into Staging Area.

6.10.09 - Organize the Staging Area items by Job (chronologically, from oldest to most recent), by Shift within the Job (chronologically, from oldest to most recent), by Item Type within the Shift, and by Item Number within the Item Type.

6.17.09 – If Primary Equipment "could be" part of a package, then show a package icon next to the item.

Delete for Credited items

Delete Selected

7.8.09 – Payment Authorization must contain PO Line descriptions if available.

0610.09 – Prevent an Invoice from going to Submitted or Posted Mode, if the invoice has been overridden to be non-taxable. Instead move the Invoice to Pending Approval Mode.

10.23.08 – Contract is a selection box that may or may not come with Job info. However, user must select the type of price structure to use for the invoice.

05.28.09 – The user needs to be able to assign an Invoice to a *Pending PO*, and to ***replace a Pending PO with a real one.***

06.10.09 - For each new (Open) Invoice, automatically set the Payment Authorization to that of the Job containing the Staging Area items being added. Prevent multiple Payment Authorizations from going onto one invoice.

7.8.09 - If the customer requires a "submit" before posting, then the "Post button will be hidden until the submit button is used.

07.06.09 – Need top allow the editing of prices inside the grid, as well as the popup.

Flag non contract items that are being invoiced.

User must enter the quantity if UoM is different than the default

Custom Invoice variance needs to be divided into % discount on a line item basis on master invoice. This percentage overwrites any previous values.

7.6.09 – Discount for packages

6.10.09 – Custom Variance is the difference between Custom Invoice Total and Actual Total.
* If the Invoice has a Custom View, recalculate the Variance when an Item is added from the Staging Area.

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Open ▾ | Print | New ▾ | Delete | Post

Customer PO 1234567890
Show All
From 01/01/2009 To 02/01/2009

Staging

- Job Number: 123456
  - Shift Number: 0011-00259
    - Equipment Type
      - Description
      - Description
      - Description
      - Description
    - Lab
    - Mat
  - Shift Number: 1111-00259
- Job Number: 45746574
  - Shift Number: 222-00259
  - Shift Number: 333-00259

Move Selected to Invoice »

Invoice

ATTN: Accounts Payable
Alpha Petroleum Corporation
P.O. Box 600
Pasadena, TX 77901

Thank You. We appreciate your business.

Questions about this invoice? Call John Smith at 1-800-HYDROCHEM.

Amount Due $3,069.17

Warning: Amount is more than 85% of Purchase Order amount

Terms: Net 30 | SES Number: | Invoice: BTX0123456 | Branch: 00101 LaPorte, TX
Reference Number: 1234567890 | Date: 08/15/2008 | Contract: 02716-CSA | Apply to: LTX0123456

Error: Defined value does not match

Warning, click to see a full list.

HB020003 Sdp -10,000 PSI – 30 GPM
QTY: 10.5 hrs.
Unit Price: $37.63
Extension: $365.49
Discount:
Net Extension:$365.49

Job Number: 67890 | Start Date: 08/10/2008 | Completion Date: 08/10/2008
Description: **Clean Truck Loading Spot** | Date of Service: 08/10/2008 | Authorized Rep.: John Woo

Shift Number: 0011-00259 | Start Date: 08/10/2008 | Completion Date: 08/10/2008

Shift Number: 0011-00260 | Start Date: 08/10/2008 | Completion Date: 08/10/2008

Item Code	Description	Unit	Quantity	UoM	Price	Extension
HB002001	Labor Technician	John Smith	12	Hrs.	$10.00	$120.00
CC020002	Circulator 1001-1500 Gal		2	Ech.	$125.00	$250.00
HB300001	Cleaning Truck	4352	4	Ech.	$225.00	$800.00
Possible Package	Crew Leader	Kevin Jones	10	Hrs.	$15.00	$150.00
CC020002	Circulator 1001-1500 Gal		2	Ech.	$125.00	$250.00

HB040088 Crew Package | **Total Price: $1,200.00**

Package Unfulfilled

HB040077 Cleaning Crew Package | Qty 4 Hours | **Total Price: $1,200.00**

Package Fulfilled

Item Code	Description	Unit	Quantity	UoM	Price	Extension
HB300001	Cleaning Truck	4352	4	Ech.	$225.00	$800.00
HB002001	Labor Technician	John Smith	12	Hrs.	$10.00	$120.00
HB002002	Crew Leader	Kevin Jones	10	Hrs.	$15.00	$150.00
	Variance					$130.00

Remit payment to:
HydroChem
P.O. Box 644676
Dallas, TX76264-4676

Federal tax ID: 75-2503906

Work Order 0003-01959 Total	$1,372.74
Extension Total	$3,069.17
Discount	$0.00
Tax	$0.00
Invoice Variance	$130.00
Amount Due	$3,069.17

Invoice total variance needs approval

Additional Notes and Comments to be printed with the invoice. 452 characters remaining

Manager Approval

Invoice Stat

Invoice Approvals
- Invoice total varianc
- Taxability Override

Notes
- 06/01/09 Note Description
- 06/01/09 Note Description c
- 06/01/09 Note Description c
- 06/01/09 Note Description c

Add a new note

Display at 75%

Invoice Status: Pending Approval
Re-open invoice

Invoice Status: Disapproved
Re-open invoice
John Smith 06/01/09

Invoice Status: Approved
Re-open invoice
Export invoice
Post invoice
John Smith 06/01/09

Unit of Measure Conflict

Old Unit of Measure 10 Miles

* **Correct Unit of Measure** Meters

* = Required Field

Save Cancel

Edit HB001212 Properties

Item Code: HB001212

Total : $250,000

Last Modified By: John Doe on 5/19/2009 at 3:30PM CST

Item Description	John Smith - 1234567890		
Invoice Description			
Original Quantity	8 Hours	0 Minutes	
Contract No-charge Quantity	- Hours	Minutes	
Specified No-charge Quantity	- 1 Hours	Minutes	
Invoice Quantity	7 Hours	0 Minutes	Net to Zero
Per Hour Unit Price	$100.00		
Subtotal	$700.00		
Discount Type	Choose one --		
Discount	0.00		
Total	$700.00		
6.25% Tax	$43.75		
Total withTax	$743.75		Hide Item
* **Reason**	Choose one --		

* = Required Field

OK Cancel

06.10.09 – Pending Employee button will open a separate popup for reconciling to an oracle employee

05.20.09 - Will vary based on type of Unit of Measure.

06.05.09 – Quantity Destroyed Line to be displayed for Aux. Items.

07.08.09 – If you No Charge a labor item, and that item has a gate log, then a reason will be required.

06.17.09 – Discount line needs to support % as well as $ amounts.

05.20.09 - Hide available if Total w/tax is $0

07.08.09 - Authorization only if Total is less than or equals $0, ad if No Charging an item that has a gate log.

Edit CC020002 Properties

Item Code: CC020002 **Total : $250.00**

Last Modified By: John Doe on 5/19/2009 at 3:30PM CST

Item Description	Circulator 1001-1500 Gal - 12345
Invoice Description	
Original Quantity	2 Each
Contract No-charge Quantity	- Each
Specified No-charge Quantity	- 1 Each
Invoice Quantity	1 Each [Net to Zero]
Per Unit Price	$125.00
Subtotal	$125.00
Discount Type	Choose one --
Discount	0.00
Total	$125.00
6.25% Tax	$7.81
Total withTax	$132.81 [Hide Item]
* **Reason**	Choose one --

[Remove from Package] * = Required Field [OK] [Cancel]

06/11/09 - Only allow for a user to enter or change a Price per Unit for an item if the item is one of the following:
(a) An Item on a Invoice with a Contract Level that indicates Branch Standard Pricing
(b) An Item marked as Destroyed
(c) A Third-Party Charge Item
(d) Priced on Request Items
(e) Package Items, where the Unit Price is Editable flag is set to true.

06.11.09 – Discount Type is by Dollar or Percentage

06.10.09 – determine whether the products and/or services are taxable (by Customer Site).

06.17.09 – remove Package Button will appear if the item is currently associated with a package. When item is removed from a package it will be added back to the Invoice shift from which it came.

06.10.09 – Pending Employee button will open a separate popup for reconciling to an oracle employee

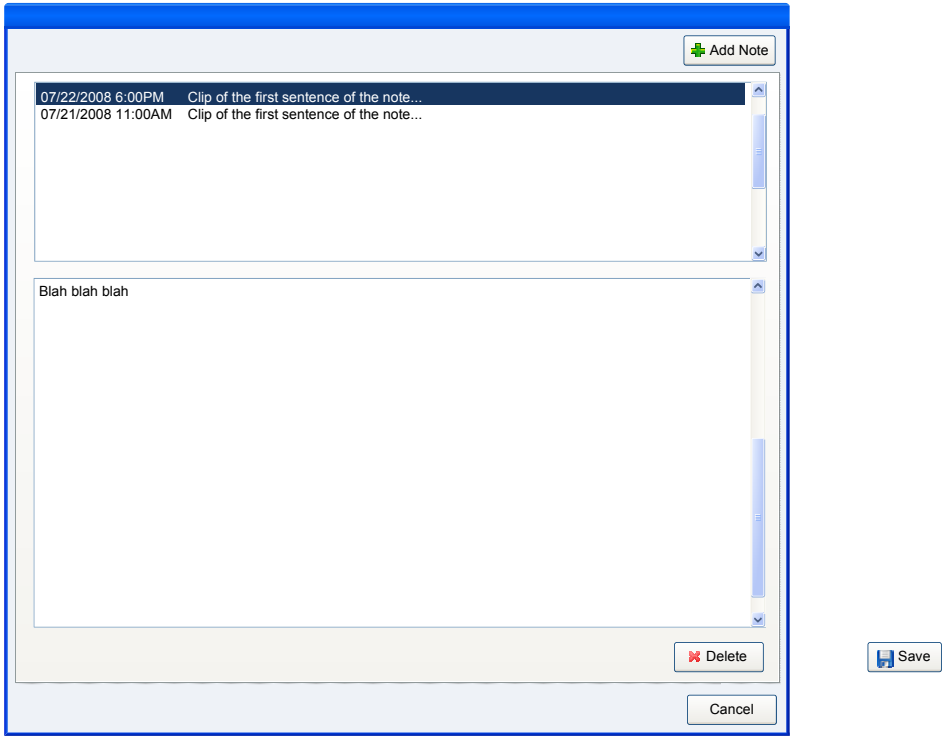
05.20.09 - Will vary based on type of Unit of Measure.

06.05.09 – Quantity Destroyed Line to be displayed for Aux. Items.

06.17.09 – Discount line needs to support % as well as $ amounts.

05.20.09 - Hide available if Total w/tax is $0

05.20.09 - Authorization only if Total is less than or equals $0. Also, Specified No-Charge change .


Add Note
07/22/2008 6:00PM Clip of the first sentence of the note...
07/21/2008 11:00AM Clip of the first sentence of the note...
Blah blah blah
Delete
Save
Cancel

Invoice Disapproved

Authorized By John Smith

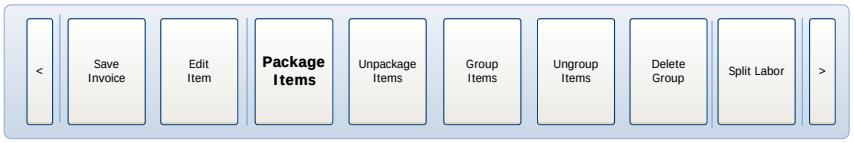
Authorized On 01/06/2009 at 10:00AM CST

Authorized Description

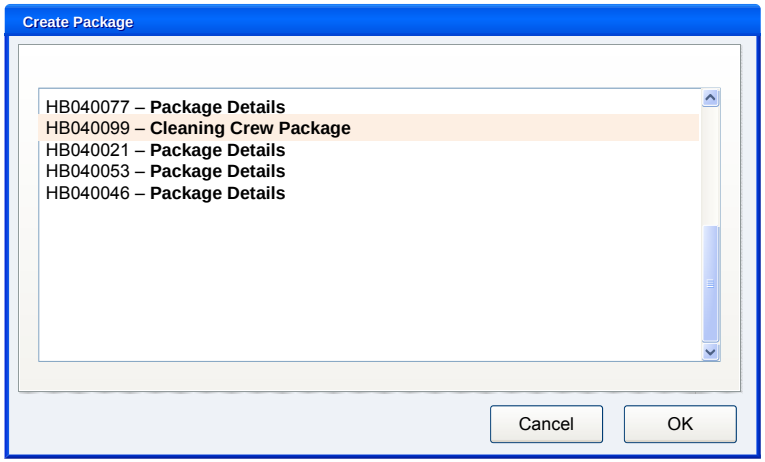
Long description of why the invoice was disapproved.

Save Cancel

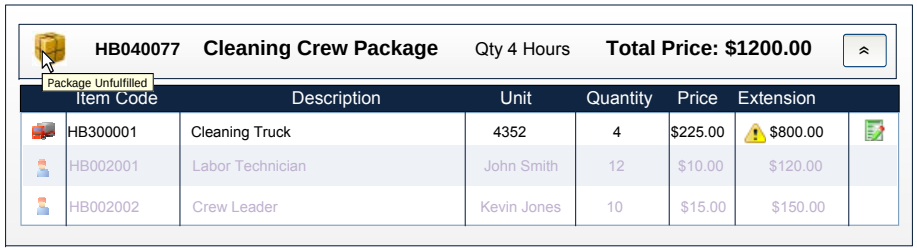
Step 1: Click Package Items button in Ribbon



Step 2: Select the package to create



Step 3: New Package is Placed on Invoice



Package is created based on key Line Item all other line Items in the package are template until user drags items from Invoice grid into package grid

Step 1: Select Labor Item

Item Code	Description	Unit	Quantity	Price	Extension
HB002001	Labor Technician	John Smith	12	$10.00	$120.00
CC020002	Circulator 1001-1500 Gal		2	$125.00	$250.00
HB300001	Cleaning Truck	4352	4	$225.00	$800.00
HB002002	Crew Leader	Kevin Jones	10	$15.00	$150.00
CC020002	Circulator 1001-1500 Gal		2	$125.00	$250.00

Step 2: Click Package Items button in Ribbon

< | Save Invoice | Edit Item | Package Items | Unpackage Items | Group Items | Ungroup Items | Delete Group | **Split Labor** | >

Step 3a: Select the hours for the labor Item

Split Labor Item

HB002001 Labor Technician John Smith 12 Hours 00 Minutes

Split One
HB002001--Labor Technician — 12 **Hours** 00 **Minutes**

Split Two
----------Select Labor Code---------- — **Hours** **Minutes**

Split Three
----------Select Labor Code---------- — **Hours** **Minutes**

John Smith 12 Hours 00 Minutes

Cancel | OK

Step 3b: Select labor Item

Select Labor Item

HB

HB002001--Labor Technician
HB002011--Labor Technician Over Time
HB002021--Labor Technician Holiday

Cancel | OK

Step 3b: Select the hours for the labor Item

Split Labor Item

HB002001 Labor Technician John Smith 12 Hours 00 Minutes

Split One
HB002001--Labor Technician — 8 **Hours** 00 **Minutes**

Split Two
HB002011--Labor Technician Over Time — 2 **Hours** 00 **Minutes**

Split Three
HB002021--Labor Technician Holiday — 1 **Hours** 00 **Minutes**

John Smith 11 Hours 00 Minutes
Difference + 1Hours 00 Minutes

OK | Cancel

Total of Split hours must be equal to the total hours for the original labor item

Step 4: New Labor Items Placed in Invoice Grid

Item Code	Description	Unit	Quantity	Price	Extension
HB002001	Labor Technician	John Smith	8	$10.00	$120.00
CC020002	Circulator 1001-1500 Gal		2	$125.00	$250.00
HB300001	Cleaning Truck	4352	4	$225.00	$800.00
HB002002	Crew Leader	Kevin Jones	10	$15.00	$150.00
CC020002	Circulator 1001-1500 Gal		2	$125.00	$250.00
HB002011	Labor Technician Over Time	John Smith	2	$15.00	$30.00
HB002001	Labor Technician Holiday	John Smith	2	$30.00	$60.00

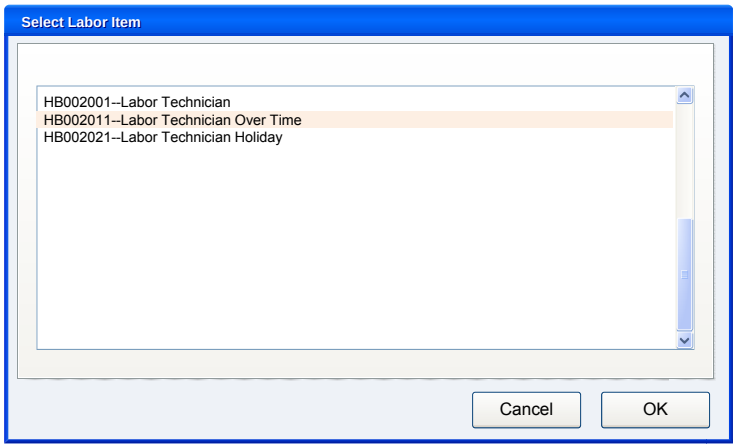
Auto Ascend by Item Code.

Step 1: Select Labor Item

Item Code	Description	Unit	Quantity	Price	Extension
HB002001	Labor Technician	John Smith	8	$10.00	$120.00
CC020002	Circulator 1001-1500 Gal		2	$125.00	$250.00
HB300001	Cleaning Truck	4352	4	$225.00	$800.00
HB002002	Crew Leader	Kevin Jones	10	$15.00	$150.00
CC020002	Circulator 1001-1500 Gal		2	$125.00	$250.00
HB002011	Labor Technician Over Time	John Smith	2	$15.00	$30.00
HB002001	Labor Technician Holiday	John Smith	2	$30.00	$60.00

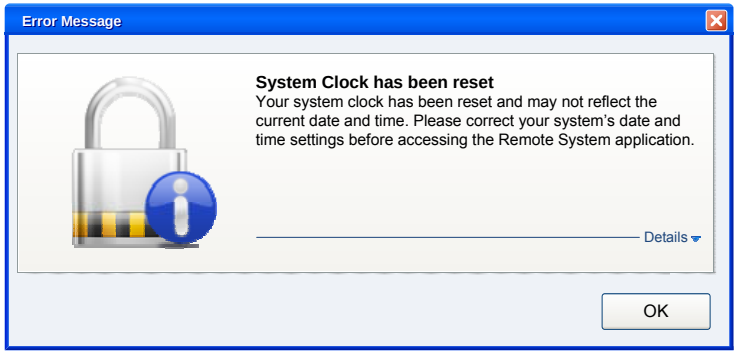
Step 2: Click Combine Labor button in Ribbon

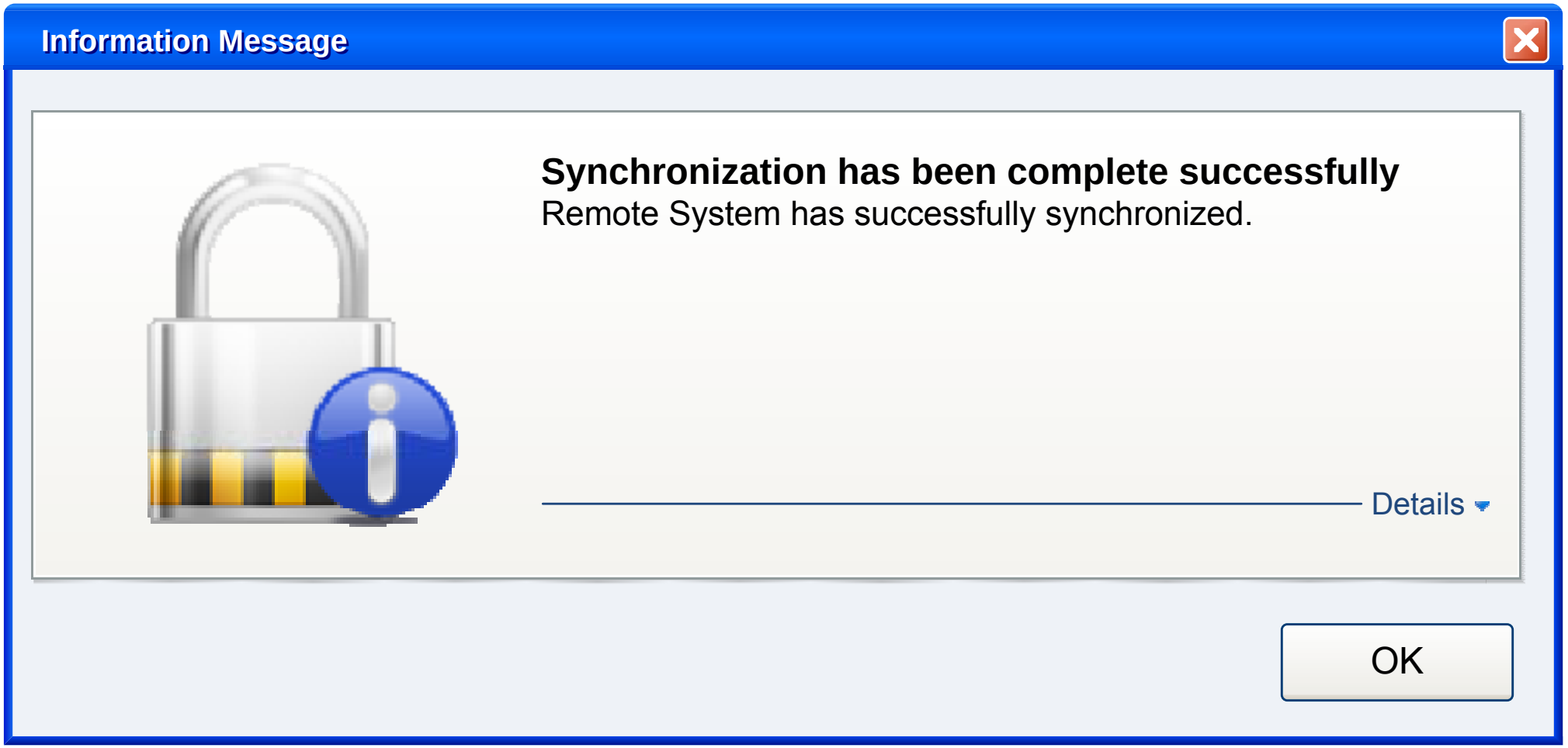
Step 3: Select labor Item

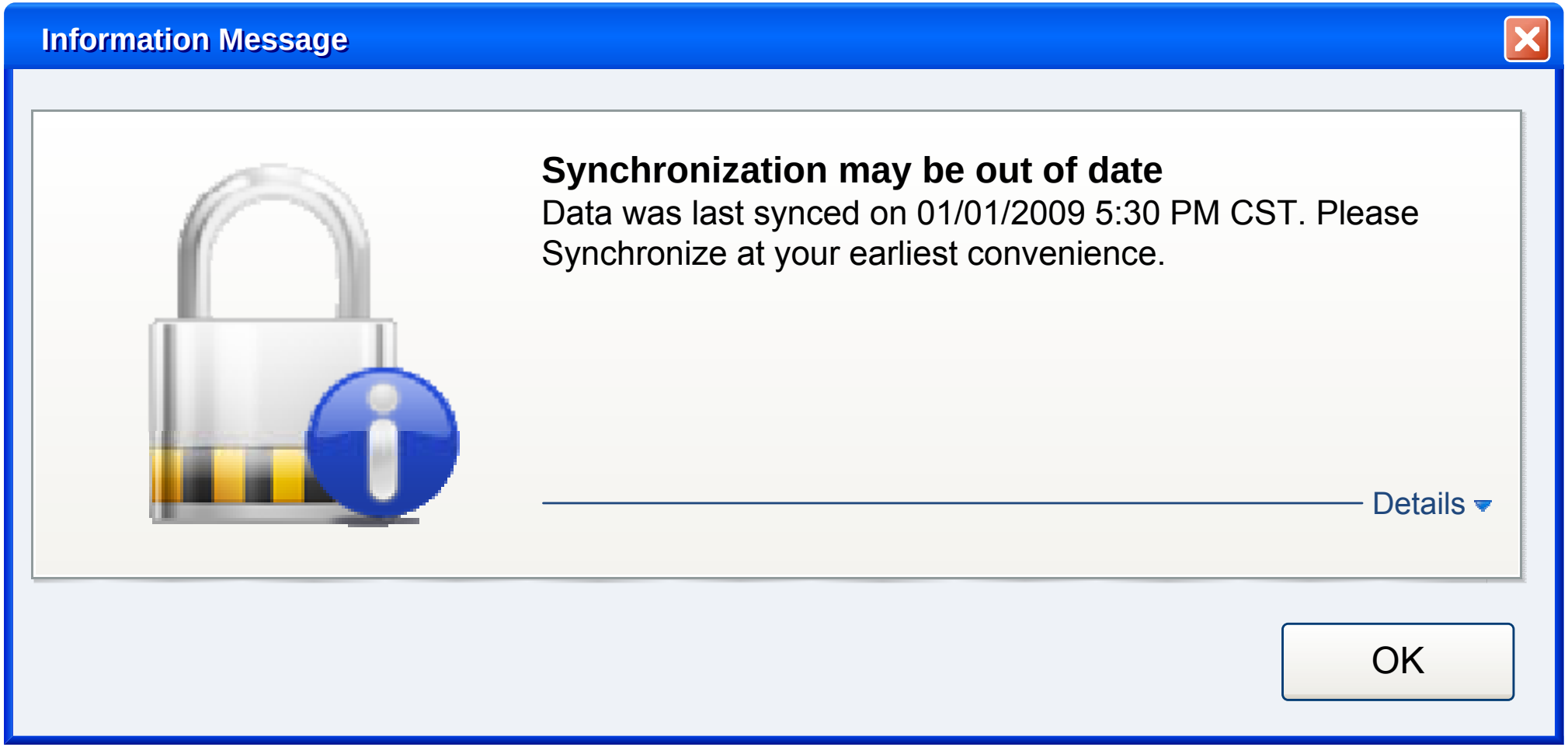


Step 4: New Labor Item placed in Invoice Grid

Item Code	Description	Unit	Quantity	Price	Extension
HB002001	Labor Technician	John Smith	8	$10.00	$120.00
CC020002	Circulator 1001-1500 Gal		2	$125.00	$250.00
HB300001	Cleaning Truck	4352	4	$225.00	$800.00
HB002002	Crew Leader	Kevin Jones	10	$15.00	$150.00
CC020002	Circulator 1001-1500 Gal		2	$125.00	$250.00
HB002011	Labor Technician Over Time	John Smith	4	$15.00	$60.00


Error Message
System Clock has been reset
Your system clock has been reset and may not reflect the current date and time. Please correct your system's date and time settings before accessing the Remote System application.
Details
OK


Information Message
Synchronization has been complete successfully
Remote System has successfully synchronized.
Details
OK


Information Message
Synchronization may be out of date
Data was last synced on 01/01/2009 5:30 PM CST. Please Synchronize at your earliest convenience.
Details
OK

Remote System 2.0 Branch

Last edited by: Chad Surprenant
ChadS@intellinet.com
Last updated on 07/06/2009