HR/Accounting Subject Matter Expert

Based on HR/Accounting SME Session 1.
Session ID: HRAccountingSME_11112015_1400

Functional Requirements

User Item

An admin shall customize the user role categories available.

Employee Item

An admin shall add the employee as a user in the system.

An admin shall customize the types of employees in the system.

An admin shall set the user role category of the employee.

Client Item

An admin shall set up a client in the system.

An admin shall set the user role category of the client.

An admin shall add the client's projects to the client item.

An admin shall customize the industry codes available to the client item.

Company Item

An admin shall add a company into the system.

An Admin shall add an employee under the company.

An Admin shall add a project under the company.

Project Item

An admin shall customize the available branches in the system for projects

An admin shall specify which user category roles can be set as account managers for projects.

An admin shall add the billing information to a project.

An admin shall add the consultants to the project and select their role.

An admin shall input the project metadata.

Accounting and Payroll Process

The admin shall configure a data export to Paychex, a 3rd party payroll system.

The admin shall configure a data export to Quickbooks, a 3rd party accounting system.

The system shall alert the admin every time an employee submits hours.

The admin shall review the exports for errors or missing data.

The admin shall cross check the time entry data with the payroll and accounting data.

Closing a Project Process

1. Admin determines when a project is permanently done.
2. Admin accesses the project within the system
3. Admin changes the project to Not Active

Templates

Administrators shall set up templates for new users which include preset projects, e.g. comp time, jury duty, floating holidays, paid time off, recruiting, sales, internal projects.

Support

A user shall undergo training for the system

An admin shall undergo training and support to set up the system

A user shall access help documentation for the system, e.g. videos, walkthroughs

A user shall access email support for the system

A user shall access live chat support for the system

A user shall share screens with the live chat operator

A live chat operator shall see account information for the user they are assisting

Reporting

An employee shall access simpled canned reports

An employee shall customize advanced reports

Logging Time Process

1. Employee accesses the system
2. Employee selects the day they want to log time for
3. Employee logs time on active projects
4. Employee logs time on non-billable work (e.g. PTO, holidays)
5. Optionally, manager approves the logged time.
6. Employee submits all logged time to the system

Non-Functional Requirements

- Accessible on mobile devices, laptops, anything the employees want to use to input time.
- Simple to use
- Security - the environment should be protected from tampering and accessible only to authorized personnel.

Data Requirements, Events and Inputs/Outputs

User

- Name
- Company employed by
- Role Category, e.g. time entry user, global administrator, project manager.

Employee

- Name
- Company employed by

- Type, e.g. salaried, hourly, independent contractor.
- Home Address
- Assigned Projects
- User Role Category

Client

- Cell Phone
- Home Phone
- Email Address
- Owned Projects
- User Role Category
- Company employed by?

Company

- Name
- Industry Type Code
- Account Size
- Company Type, e.g. Client, Vendor, and Independent Consulting Company
- Client Billing Contact
  - Name
  - Work phone
  - Work Email
  - Company Address
- Owned Projects

Project

- Branch that gets credit, e.g. Dallas, Austin.
- Account Manager(s) from list of users with the Account Administrator user role.
- Project Name
- Estimated Hours
- Estimated Cost
- Is Billable, i.e. yes or no
- Is Active, i.e. yes or no
- Billing Method
- New sale or extension of existing project
- client billing contact
- Bill frequency

- Billing Type
- Billing Instructions
- Attached Employees and their role for this project
- Start Date
- End Date
- Bill Rate
- Referrals

Events and Timing

Employee Time Logging Flow

1. Employee logs time
2. Employee reviews their logged time daily to weekly
3. Employee submits their logged time
4. System alerts Admin that time has been submitted

Admin Payroll/Accounting Flow

1. Date is 1st of month or middle of the month
2. Admin checks if all time has been submitted
3. Admin exports data for accounting
4. Admin exports data for payroll.

Installation Requirements

- All on one database/system