## COVER PAGE TITLE GOES HERE

## JD’s Babbitt Bearings functional specifications

## overview

The JD’s Babbitt Bearings product allows managers and employees to manage jobs, view their skills, submit vacation time, and submit time in/time out for hours worked. Customers can track the status of their jobs and managers can create new customers, update skills of employees and view hours worked for all employees.

## Employee Portal

The Employee Portal will be used as an employee management administration tool. The EP will include the ability for admin level users to view/adjust vacation time, timesheets, billing reports, along with employee skills and certifications.

**1.1 Login**

The login screen will be used as a means of identifying the employee logging into the station. From here the application will determine the user’s accessibility level along with the identifying information about the employee.

* + 1. If the PIN is valid, the user will navigate to Landing (2.2)
    2. If the PIN is not valid, an error message will be displayed
  1. **Landing**

The landing page is the screen every user goes to after a successful login. The screen will appear differently to users with different access levels. A regular employee will have access to Vacation, Vacation Report, and Timesheets and will only have the capability to view their own information. Admin level users will have access to all of the screens along with information on all of the employees.

* + 1. Vacation
    2. Vacation Report
    3. Employee Management (Management Only)
    4. Timesheets
    5. Timesheet Report (Management Only)
    6. Billing Report (Management Only)
    7. Skills (Management Only)
    8. Certificates (Management Only)
  1. **Vacation**

The Vacation screen will consist of a calendar display. The calendar will be interactive, allowing employees to select a date and request time off. The calendar will also be used to display the dates of people that have already requested off.

* + 1. For a user to request time off they must have either Vacation Time or Personal Days. Time off is to be used by the Employee’s Anniversary Date.
       1. Vacation Time – Straight Time Pay
          1. An employee earns 1 week vacation after 1 year (40 hours)
          2. An employee earns 2 week vacation after 2 years (80 hours)
          3. An employee earns 11 days of vacation after 6 years (88 hours)
          4. An employee earns 12 days of vacation after 7 years (96 hours)
          5. An employee earns 13 days of vacation after 8 years (104 hours)
          6. An employee earns 14 days of vacation after 9 years (112 hours)
          7. An employee earns 15 days of vacation after 10 years (120 hours)
       2. Personal Days – Straight Time
          1. An employee earns 1 day of personal time after 1 year (8 hours)
          2. An employee earns 2 day of personal time after 2 years (16 hours)
    2. The Vacation Details screen contains these controls:
       1. If the currently logged in user is an employee, he sees Employee name in an read-only field
       2. If the currently logged in user is a manager, he sees an Employee Name control in a dropdown with his own name selected. This way he can set the vacation for any employee.
       3. Start date as a date picker control that is initialized as the date clicked on by the employee
       4. End date as a date picker control that is also initialized as the date clicked on by the employee
       5. Vacation hours in a dropdown. The user must select either 4 or 8 hours. Defaults to 8 hours. This is only visible if the start and end dates are the same. It is assumed that the employee is taking vacation in 8 hour increments if he is blocking out a bunch of time in one operation. If this is not the employee’s intent (suppose he wants a week of ½ days), he needs to create a 1-day vacation on each of the days, with the appropriate number of hours selected.
       6. Earned hours remaining: read-only field that dynamically adjusts based on the amount of vacation hours the employee has minus the number of hours indicated on this particular vacation request.
    3. No vacation hours are carried over from one year to another. All vacation days are available on the employee’s anniversary; any unused vacation is lost.
    4. If the user is not a manager and selects a day with fewer than two people claimed for vacation, a confirmation box allows the day to be successfully claimed for vacation
    5. If the user is not a manager and selects a day with two or more people already claiming vacation, the confirmation box requires manager sign-off
    6. If the user requests more vacation than he currently has available, the confirmation box requires manager sign-off. The user may thereby have negative vacation hours.
    7. If the user does not give 10 days’ notice for a vacation, the confirmation box requires manager sign-off.
    8. If the user is a manager and selects a day, the confirmation box allows for any employee to be selected from a dropdown for vacation
    9. If the day is a holiday the calendar will reflect this by outlining the date with a red box. The following are valid holidays.
       1. New Year’s Day
       2. Memorial Day
       3. 4th of July
       4. Labor Day
       5. Thanksgiving Day
       6. Christmas Day
  1. **Vacation Report**

The Vacation Report screen provides the details of a particular employee and specifics relative to their vacation including start date, remaining hours, and total hours taken. There will also be a grid displaying the dates used for vacation.

* + 1. A dropdown enables filtering by employee
    2. A “Save Report to CSV” exports the data in .csv file format
    3. A “Print” button allows the user to print out the table as it is displayed
  1. **Employee Management**

The Employee Management screen will only be accessible to users with an elevated privilege level. Here the user (manager) can add new employees and edit the details of current employees.

* + 1. Managers can select any employee from a dropdown and edit the fields:
       1. Name
       2. Address
       3. City
       4. State
       5. Zip
       6. Email
       7. PIN
       8. Start Date
       9. Emergency Contact
       10. Notes
    2. An “Upload Files” button allows the user to select files to upload and associate with the employee
    3. Managers can create a new employee
  1. **Timesheets**

The Timesheets screen will only be accessible to users with an elevated privilege level. Here the user (manager) can view Employees by their pay periods and view their hours worked and whether or not they worked through lunch. The user may print off individual timesheets.

* + 1. A pay period can be selected from a dropdown box
    2. Paydays are the 15th and the end of the month
    3. Start time for each day in that pay period can be input
    4. End time for each day in that pay period can be input
    5. A “Worked Through Lunch” checkbox subtracts a half hour from time worked if left unchecked
    6. Total hours are displayed
    7. Straight hours are displayed (first 40 per week)
    8. Overtime hours are displayed (next 20 per week)
       1. Overtime is defined as anything over 40 hours a week (Monday – Sunday)
       2. Overtime pays base hourly times 1.5
       3. Overtime on Sundays and Holidays pays base hourly time 2 (double time)
    9. Double-overtime hours are displayed (holidays and sundays)
    10. A “Print” button provides a print-friendly version of the screen
    11. A “Save” button is available to store the information
    12. A “Cancel” button is available to clear the timesheet information
    13. Managers can select any employee from a dropdown. Otherwise, the only employee that is available is the currently logged-in employee.
  1. **Timesheet Report**

The Timesheets Report screen will only be accessible to users with an elevated privilege level. Here the user (manager) will be able to view a list of employees and their hours worked by pay period. The user will have the ability to print off the reports as well.

* + 1. A pay period can be selected from a dropdown
    2. A grid showing the start and end times for each employee for each day in the pay period, with total hours and a breakdown to standard-, over-, and double-over-time is displayed.
    3. A “Download CSV” button downloads a spreadsheet file to the computer.
    4. A “Print” button provides a print-friendly version of the screen
    5. A “Print All” button will print all employees’ timesheets, one per page, for the selected pay period.
  1. **Billing Report**

The Billing Report screen will only be accessible to users with an elevated privilege level. Here the user (manager) will be able to view a list of jobs, customer info, shipped date, and the billing status. Details of the jobs can be accessed and edited by the user.

* + 1. A grid is displayed containing current shipped but unbilled job details containing:
       1. Job number
       2. Customer
       3. Shipped date
          1. Status, which can be changed via dropdown, jobs which are changed to “billed” are removed from the grid
    2. A “Download CSV” button downloads a spreadsheet file to the computer
  1. **Skills**

The Skills screen will only be accessible to users with an elevated privilege level. Here the user (manager) will be able to view a list of employees along with their specific skills. The user can use the check boxes to identify the skills of each employee.

* + 1. Each box indicates weather the employee has the skill or not
    2. The indicator can be toggled to add or remove that skill from the employee
    3. Skills are:
       1. Management
       2. Incoming Inspection
       3. Centrifugal Cast
       4. Final Inspection
       5. Packaging
       6. Fill Propane
       7. Fork Lift
       8. Billing
       9. Start/Edit Jobs
       10. Tinning
       11. Roughout Bearing
       12. Slinger Ring Cutout
       13. Inspection for Final Machining
  1. **Certificates**

The Certificates screen will only be accessible to users with an elevated privilege level. Here the user (manager) will have a grid displaying all of the current certificates along with the expiration date, cert issuer. The user will also have the ability to edit and delete certificates.

* + 1. Certificate Name
    2. Start Date
    3. Expiration Date
    4. A “File” button to upload or download an associated file
    5. An “Edit” button to alter this information
    6. A “Delete” button to remove the certificate

# General Out-of-Scope Statement

* Maintenance of Functional Data or Enumerated Values where not explicitly stated.
* Any pages or major functionality not explicitly listed in this document (feature creep).
* Any major additions to pages that are defined (feature stuffing).
* Ordering of any list or group of data in any way not specified – if the specification does not specify an order the data will not be ordered.
* Validation or requirement of any fields due to unidentified rules. A rule must be explicitly stated in the specification or marked as required in the database for validation of that field to be in scope. This includes but is not limited to field length, field requirement, field minimum, field maximum, field uniqueness, and field precision.
* Conditional calculation or display of fields not defined explicitly in the design.
* Customization or configuration of items not explicitly stated as customizable or configurable or not explicitly stated as being customizable or configurable in the desired fashion.
* Client assumes responsibility for ensuring that all rules and features are defined explicitly in this documentation before approving development. Assumptions cannot be made after approval that rules or features are implied or necessary for operation if they are not explicitly defined in this documentation no matter how logical or necessary they may be. Client as the subject matter expert assumes responsibility for this design being complete, well planned, and thorough –  the approval of these documents by the client is an indication that the client believes all features are designed explicitly in the way they are to operate and anything else is an out of scope addition. Client assumes responsibility that all items that were discussed are also documented as although something may have been discussed during the design, it may not have made it into the design specification when it in fact should.