The timesheet functionality shall be built on top of the previous application

Resources are assigned to projects, we must implement a feature which allows them to be billed for their work.

The already built database already has data regarding who's working on what. Therefore, we can use that database for our timesheet/timeshare functionality.

He showed us the test website for the current timesheet application that they use. Our job will be to implement the important functionality he pointed out from that application into the application built by the previous capstone team.

Client = Company
There are people who are created as client representatives/managers

Tempus 1 more or less recreated the Employees and Organization section of the website. (the major feature accomplished was different types of users, can create multiple users and different types of users)

Each user has different permissions which allows them to see different things

Resources are people (contractors) CAL can assign to a project depending on their skillset and the requirements for the client's project, their resume's are available to view on the Tempus 1 website.
Tempus 1 allows users to save their resume's and be assigned to projects

Tempus 1 allows resources to be assigned to projects, now we need to add a timeshare feature in order to allow them to be charged for their work depending on the hours they spend working on the project/

User Settings/ Roles and Permissions

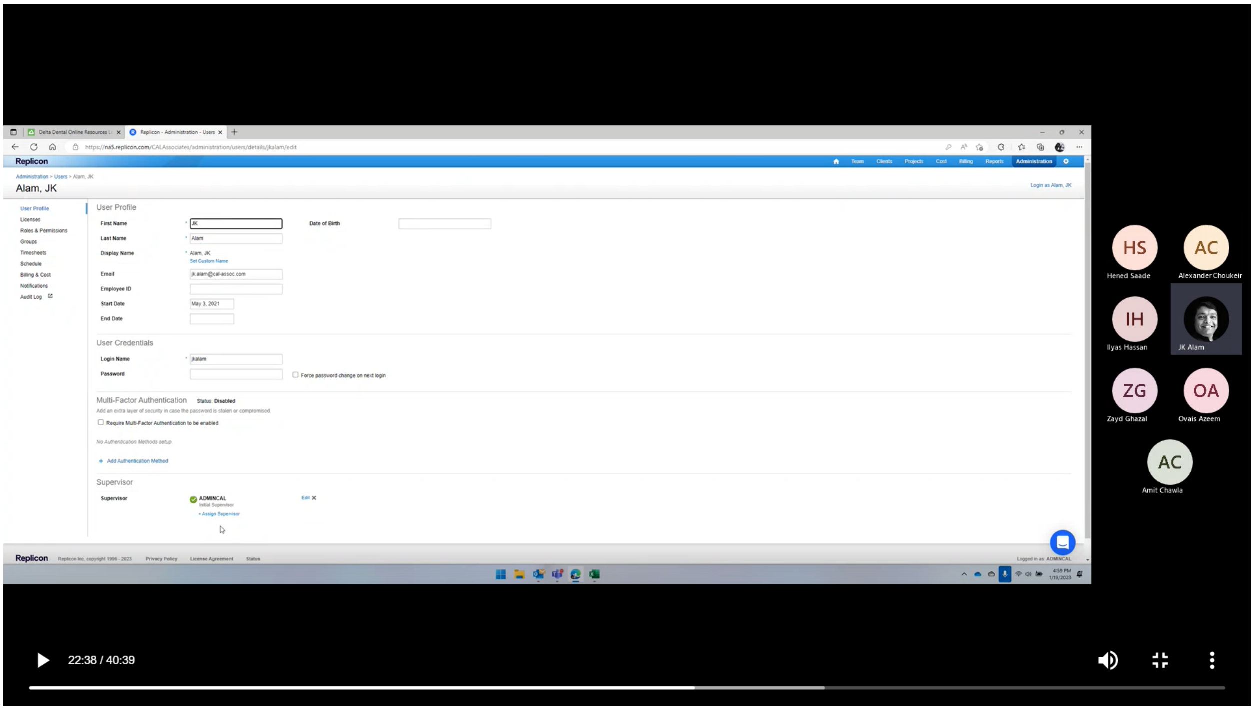
"User" can be -> Client Representative, Employee, Supervisor

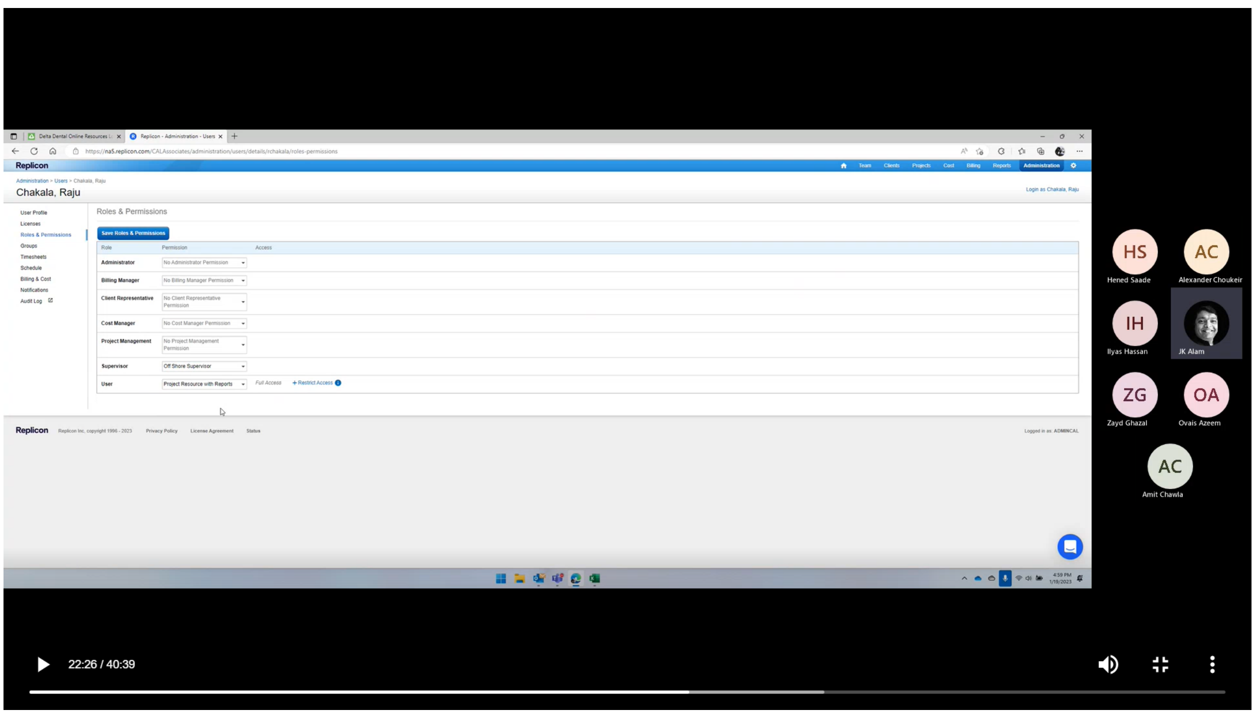
Employee can only submit timesheets, change their timesheet (once submitted, sent to supervisor, supervisor then reviews and approves it, then each of the client representatives for the project is emailed with the timesheet and are asked to approve)

Supervisor: can look at their timesheet, approve it -> then timesheet needs to be approved by client of the project

Client Representatives, can only see the projects that they are approving for

Possible Roles (each user can have different roles which gives them different permissions, ex: someone can be user with project resource privileges and a supervisor with supervisor privileges) (only employees with a supervisor role can be chosen as a supervisor for other employees) (Roles other than supervisor and user, have a lot of confidential data and aren't used often) :
Admin:
Billing Manager:
Client Representative:
Cost Manager:
Project Management
Supervisor: (Supervisor) (Default is always gonna be ADMIN, if ADMIN is the user's supervisor, that means there is no need for supervisor approval for their timesheet, it can be directly sent to the client representative(s) for approval)
User: (Project Resource)





They do not use the GROUPS section which specifies if the resource is on shore or off shore and specifies their location (main office) and specifies full time or part time.

Timesheet Details and Settings

They only need one type of timesheet that the user can fill out, no need for any other types. They usually use weekly time sheets without crossing months. They always start at the first of the month. Near the end of the month, if there aren't enough days for a full 7 day time sheet, they'll extend it. When they extend it, they include more than 7 days on the timesheet, since the time sheet is submitted on the 7th day, they need to forecast their hours for the remaining days (predict how many hours they'll work). This causes issues sometimes since sometimes they are wrong about the forecasted hours due to emergencies and other unforeseen events. They are able to update it but sometimes they forget. This is something they would like to fix but they want to be realistic about what's possible to achieve with Tempus 2. (weekly without crossing months is the only type of timesheet they really need implemented, that's the priority)

Timesheets also always have saturday be the last day and sunday be the first day of the timesheet period. So if the timesheet for a month start's on Wednesday for instance, it'll end on Saturday and so it'll be a 4 day timesheet.

Perhaps we could try a confirmation system for the timesheets? In the event of an extended timesheet with forecasted hours, we could require employees confirm their hours after the period is over?

Schedule:

Each user also has a schedule and they like this feature and would it implemented, but there's an issue with the current implementation. They are able to create a custom calendar for each client so that when an employee is working with them (it's sometimes necessary to create a custom calendar since some companies have non traditional/international holidays), the holiday days that the client's company observes will be grey'd out in the timesheet when the employee is filling them out. They can still put hours in for those holidays, but it's grey'd out so their aware that they probably aren't supposed to be working that day. The issue is that they need to refill the correct holidays for that specific client every year. A "nice to have" feature to fix this would be a **generic** calendar that has ALL holidays including international ones. The whole holiday and calendar feature can be something we think about later, after we finish implementing the basic timesheet functionality.

In the schedule section, they can also set their standard hours (mon to fri, 8 hour day). They can still put more than that in the timesheet, but then they'll be prompted (required) to add comments regarding why they worked more than 8, was it overtime? Was it approved? Who on the client's side approved it. Etc…

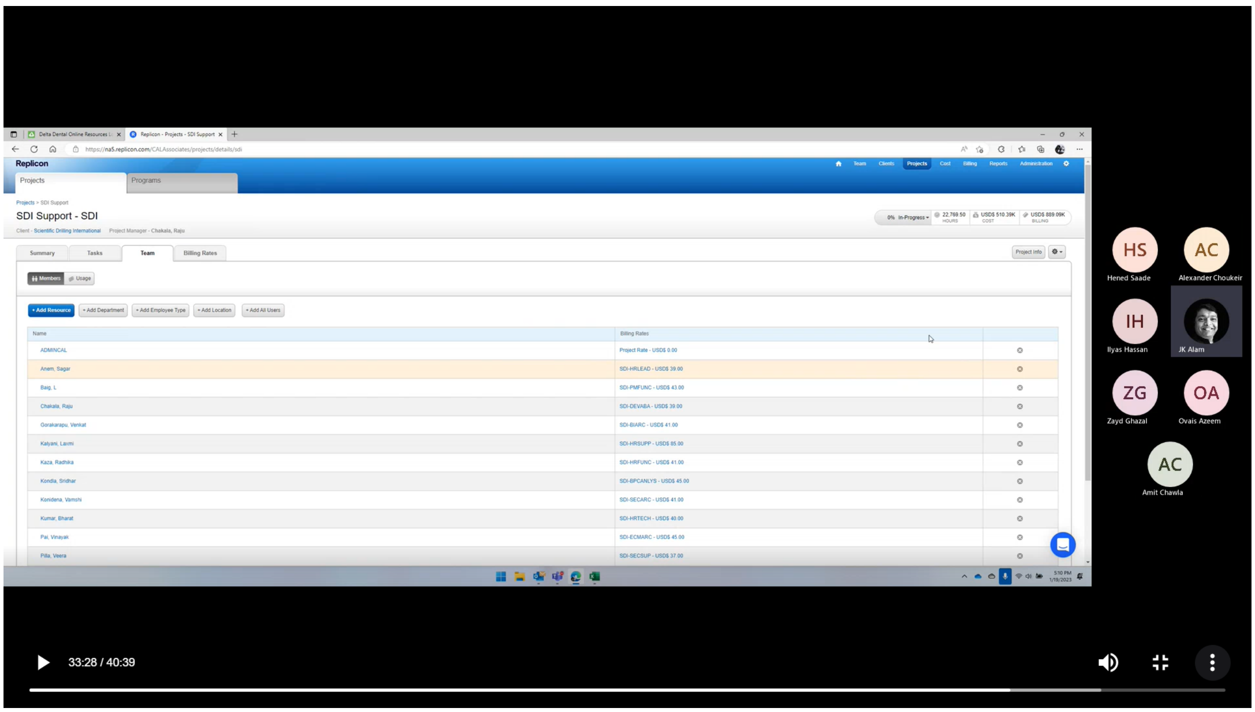
Cost/Billing:

The cost of an employee (charging rate, dollar/hour) can be different for each employee and depends on the project. A cost rate can be on the user's profile and that's what will show in the "client billing" for that employee by default. That value can then be modified if the cost rate changes due to the project.

Each project has it's own billing rate for each position available.

Each user can have a default cost rate on their profile (this default value will show in the Project section for that employee), which can then be modified in the Project section for that employee if the project dictates a higher cost.. (nice to have)

He wants to add "cost rate" to the table below as well as having the "billing rate"



Notifications section is "nice to have"

Audit Log isn't really used

Tempus 1 was basically the "User Profile" section with the resume's
Tempus 2 needs to add the Roles and Permissions section (User, Supervisor, and Admin are the only necessary ones), etc

Priority Features:

- All employees can fill out timesheets
- **Weekly Timesheets without crossing months**
- Roles and Permissions section (General User, Supervisor, Admin)
- **Cost/Billing at the user and project level**
- Notifications

US calendar is priority

Nice To Have Features:

- Schedule -> Grey out Holidays -> Generic International Calendar
- Notifications
- Fix issue with "Weekly timesheets without crossing months" regarding forecasting days at the end of a month and employees forgetting to update timesheet after they find out their forecast was incorrect(Possible solution: <u>Perhaps we could try a confirmation system for the timesheets? In the event of an extended timesheet with forecasted hours, we could require employees confirm their hours after the period is over?)</u>
- <u>Adding cost rate at the project level.</u> Each user can have a default cost rate on their profile (this default value will show in the Project section for that employee), which can then be modified in the Project section for that employee if the project dictates a higher cost
- More roles and permissions?
- Audit Log?
- Groups section?

Questions to ask Client on January 23 Meeting:

For the Roles and Permissions, is it necessary to have all the different types of user's for the User permission? As in Client Supervisor, Project Resource, Project Resource with Reports, Report User? Or do we only need Project Resource as an option for that?

How necessary is it to implement the audit log?

What's the difference between cost and billing rate?

When the cost rate for an employee for a certain project needs to be changed for some reason (to something different from the one they set on their user profile), should it be required to attach a comment to explain why the cost rate was modified?

When timesheets are sent to the client representative for approval, are they sent through email? If so, how is that supposed to work exactly? My understanding is that when the employee's supervisor approves the timesheet, a notification is sent to the client representative by email telling them that there is a timesheet awaiting their approval. Then when they log in, they'll be a timesheets section they can navigate to where they'll see any and all timesheets that are awaiting approval. Is this correct?