

Story 1 - timesheets

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- 4 - consultant todo list (1-2)
- 5 - consultant timesheet (1-3)
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Demo 1 - Timesheet Process

Defined Elsewhere



Marketing Screen
defined elsewhere



1 logon screen
select logon



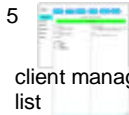
2 Consultant todo list-
select current timesheet



3 Consultant timesheet
enter data
select sign



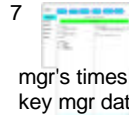
4 Consultant todo list
showing confirmat msg
select sign off



5 client manager to do list
select approve timesheet



6 timesheet selection list
select one



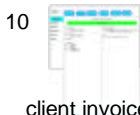
7 mgr's timesheet view .. key mgr data
select approve



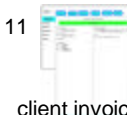
8 selection list
show effect of approve
add approved / signed / state
sign off



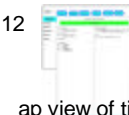
9 client epay todo
select invoices



10 client invoice review screen
select one to review



11 client invoice detail screen
select line to review



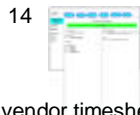
12 ap view of timesheet
select signoff



Dropped



13 vendor todo screen
select timesheets



14 vendor timesheet search screen
go get it



15 vendor timesheet select list
select line



16 vendor timesheet view



17 vendor audit history
sign off



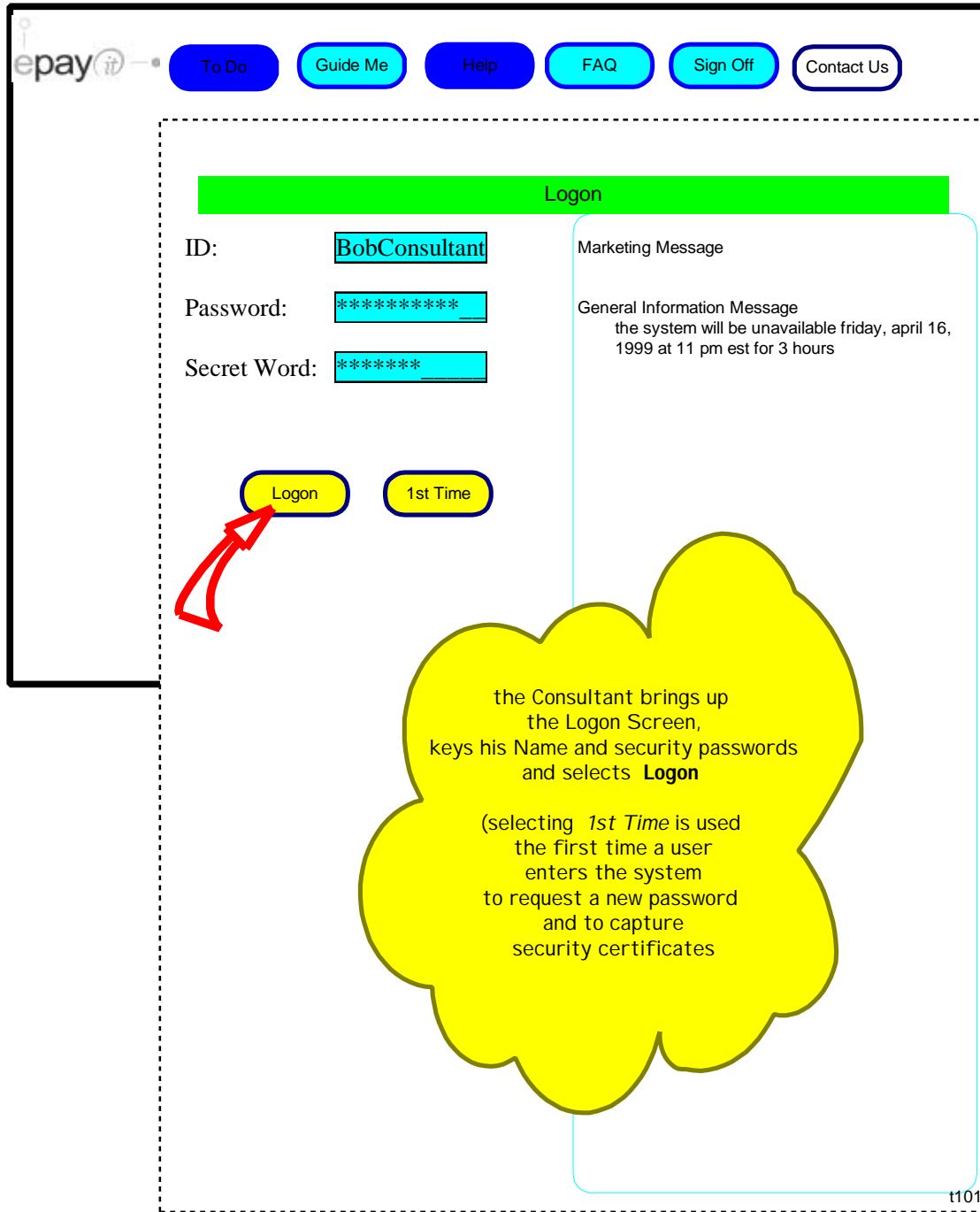
4/29/99



Story - Timesheets



2



this is the logon screen for all users

this screen shows that one person may have all roles and functions in a company

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Bob Consultant

Welcome Bob Consultant

To Do List Print

Timesheet
[1 late timesheets](#)
[1 current timesheet](#)

Expenses
[2 current expenses](#)
[1 unapproved expense](#)

System Messages
the system will be down friday, april 16, 1999 at 11 pm est for 3 hours for maintenance.

Alerts
[you a late Timesheet](#)

Timesheet
Active
All
Search
New

Expenses
Active
All
Search
New

Profiles
All
Search

Resume
Update

the Consultant **Signs on**, sees an alert and **clicks on** the *alert message* in the work frame to complete the late timesheet

t101

this is the todo screen for a consultant ... it has been customized for demo1 flow

there is an priority system message area on the right and a system generated to do list on the left both with clickable links
the left frame is written with all function possibilites for the user's authorities

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Bob Consultant (response message area)

Timesheet Print

Validate Save Sign Approve Recall Clear Delete Copy Add Project

Bob Consultant Reports to: Bob Manager Big Client

Week Ending: 04/07/1999

Client Notes:

Vendor Notes: Includes one vacation day and 4 hours of OT

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
Project	MX-5 Swift System Development							
	BC				VC			
STD	6.0	8.0		12.0	7.0			33.0
Prem								
No Bill								
Total	6.0	8.0		12.0	7.0			33.0
Notes	ahead of schedule - beginning unit test							
Project	JBS-1 Slow System Support							
	BC				VC			
STD	2.0							2.0
Prem								
No Bill					1.0			1.0
Total	2.0				1.0			3.0
Notes	problem report #2425 & 2678							
Client STD	8.0	8.0		12.0	7.0			35.0
Client Prem								
Client No Bill					1.0			1.0
Client Total	8.0	8.0		12.0	8.0			36.0
PTO			V 8.0					8.0
Total Paid	8.0	8.0	8.0	12.0	8.0			44.0

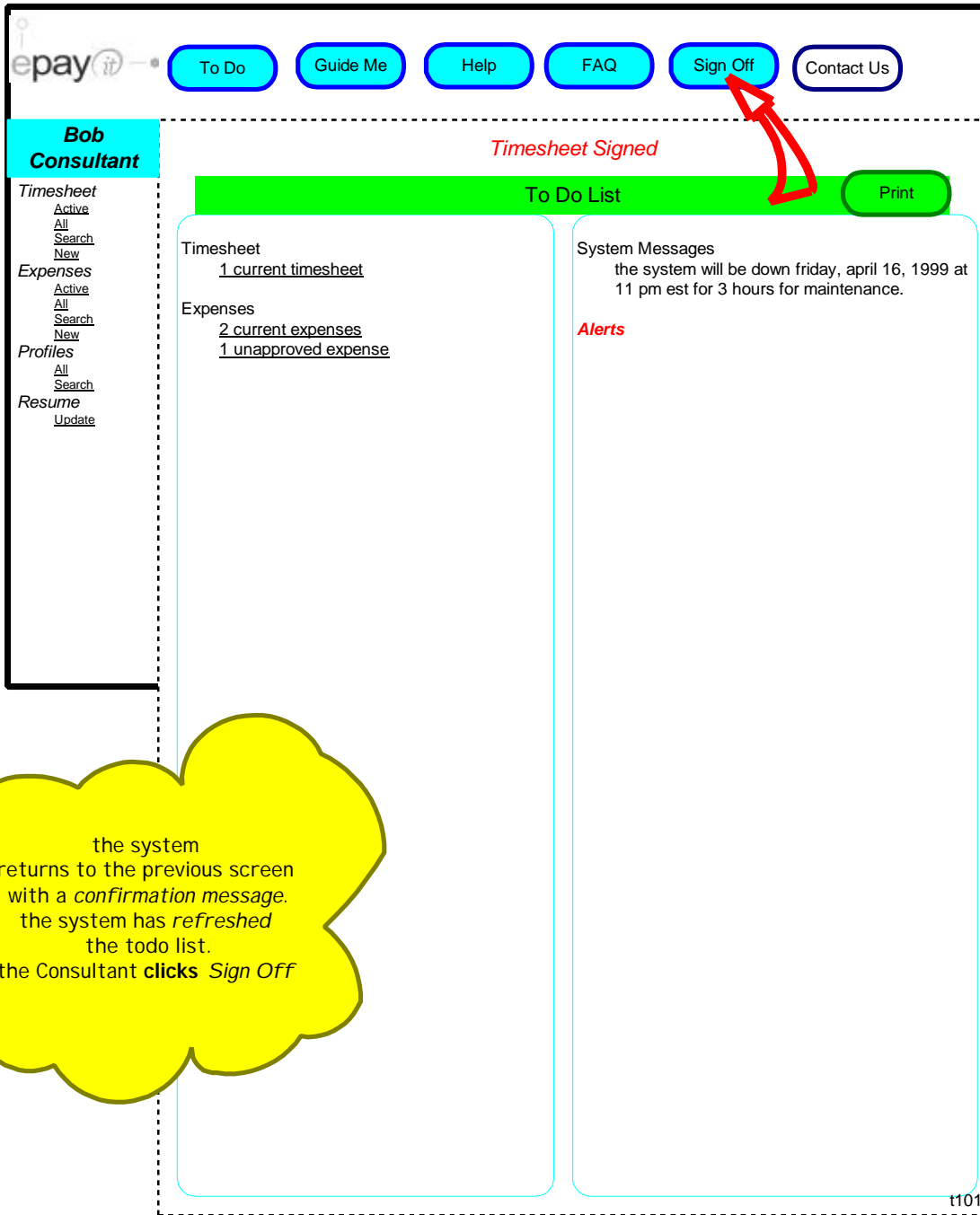
Validate Save Sign Approve Recall Clear Delete Copy Add Project

t101

the Consultant completes the timesheet and clicks Sign to submit it to his manager for approval

this is the timesheet entry screen for a consultant

It contains multiple projects listed down the screen.
 It allows entry of data specifically requested by each vendor and each client at both the timesheet and at the project level.
 There are some data fields that can be overridden by the manager when he approves the sheet ...
 and the manager's version allows additional data to be entered.
 The client version does not show vendor-requested data.
 The vendor version does not show manager-entered data except for over-rides.



the system returns to the previous screen with a *confirmation message*. the system has *refreshed* the todo list. the Consultant *clicks Sign Off*

this is the todo screen for a consultant ... it has been customized for demo1 flow

there is an priority system message area on the right and a system generated to do list on the left both with clickable links the left frame is written with all function possibilities for the user's authorities

this screen shows:

the system message replacing the welcome message, the screen returning to the previous screen, and the todo list updated by the system

4/29/99

Story 1 - timesheets

6

The Client Manager
Signs on and **selects**
8 signed timesheets
from the To Do List
to look at the
timesheets ready for
approval

this is the todo screen for a client manager ... it has been customized for demo2 flow

there is an priority system message area on the right and
a system generated to do list on the left both with clickable links

The screenshot shows the 'Bob Client Manager' interface. At the top, there are navigation buttons: To Do, Guide Me, Help, FAQ, Sign Off, and Contact Us. Below this is a 'response message area' with a green bar containing 'Timesheet Selection List' and a 'Print' button. Underneath are buttons for 'Select All', 'Clear All', 'Sign Selected', and 'Recall Selected'. The main section is titled 'Active Timesheets' with the instruction '(click a Row to display the timesheet)'. It contains a table with columns: Status, Week, Name, Vendor, and Hours. A red arrow points to the row for 'Bob Consultant'. Below the table are more buttons: 'Select All', 'Clear All', 'Sign Selected', and 'Recall Selected'. A yellow callout bubble points to the 'Bob Consultant' row.

	Status	Week	Name	Vendor	Hours
<input type="checkbox"/>	Signed	04/07/99	John Hathaway	Tape & Mirrors	35.00
<input type="checkbox"/>	Signed	04/07/99	Bill Forshey	Little vendor	60.00
<input type="checkbox"/>	Signed	04/07/99	Silvano Ravotto	Sonny's	10.00
<input type="checkbox"/>	Signed	04/07/99	Suresh Rau	Sonny's	55.00
<input type="checkbox"/>	Signed	04/07/99	Bob Consultant	Little Vendor	36.00
<input type="checkbox"/>	Signed	04/07/99	Stephen Neish	Sonny's	30.00
<input type="checkbox"/>	Signed	04/07/99	Sonny Injaty	Sonny's	40.00
<input type="checkbox"/>	Signed	04/07/99	James Kerr	Tape & Mirrors	58.00

The Client Manager reviews the list of signed timesheets and **clicks on the table row** with Bob Consultant's timesheet to review his hours prior to approval

this is the timesheet selection screen for a Client..

it is a display and selection screen showing timesheets that meet any criteria entered, and allows selection of a specific requisition by clicking on the line desired.

this screen also allows the manager to approve timesheets from the summary line rather than looking at each individually. (timesheets being approved must be validated by the system during approval)

(response message area)

Timesheet Print

Validate Save Sign Approve Recall Clear Delete Copy Add Project

Status Display

Bob Consultant Reports to: Bob Manager Big Client
 Week Ending: 04/07/1999
 Client Notes:
 Manager Notes: progress is ahead of schedule. Quick learner

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
Project	MX-5 Swift System Development							
BC	2314							
STD	6.0	8.0		12.0	7.0			33.0
Prem								
No Bill								
Total	6.0	8.0		12.0	7.0			33.0
Notes	ahead of schedule - beginning unit test							
Manager	expected 72 hours on this task							
Project	JBS-1 Slow System Support							
BC	9999							
STD	2.0							2.0
Prem								
No Bill					1.0			1.0
Total	2.0				1.0			3.0
Notes	problem report #2425 & 2678							
Manager								
Client STD	8.0	8.0		12.0	7.0			35.0
Client Prem								
Client No Bill					1.0			1.0
Client Total	8.0	8.0		12.0	8.0			36.0

Validate Save Sign Approve Recall Clear Delete Copy Add Project

t101

the Client Manager reviews the timesheet, adds comments and codes. He then clicks Approve so the system can process it.

this is the timesheet approval / entry screen for a client manager

It contains multiple projects listed down the screen. It allows entry of data specifically requested by each vendor and each client at both the timesheet and at the project level. There are some data fields that can be overridden by the manager when he approves the sheet ... (e.g. project codes) and the manager's version allows additional data to be entered. (e.g. comments) The client version does not show vendor-requested data. The vendor version does not show manager-entered data except for over-rides.

Bob Client Manager

Timesheet Approved

Timesheet Selection List Print

Select All Clear All Sign Selected Recall Selected

Active Timesheets
(click a Row to display the timesheet)

	Status	Week	Name	Vendor	Hours
<input type="checkbox"/>	Signed	04/07/99	John Hathaway	Tape & Mirrors	35.00
<input type="checkbox"/>	Signed	04/07/99	Bill Forshey	Little vendor	60.00
<input type="checkbox"/>	Signed	04/07/99	Silvano Ravotto	Sonny's	10.00
<input type="checkbox"/>	Signed	04/07/99	Surresh Rau	Sonny's	55.00
<input type="checkbox"/>	<i>Approved</i>	04/07/99	Bob Consultant	Little Vendor	36.00
<input type="checkbox"/>	Signed	04/07/99	Stephen Neish	Sonny's	30.00
<input type="checkbox"/>	Signed	04/07/99	Sonny Injaty	Sonny's	40.00
<input type="checkbox"/>	Signed	04/07/99	James Kerr	Tape & Mirrors	58.00

(click a Row to display the timesheet)

Select All Clear All Sign Selected Recall Selected

t101

the screen returns with Bob consultant's timesheet approved
The Client Manager **selects** another timesheet to review and approve

this is the timesheet selection screen for a Client...

it is a display and selection screen showing timesheets that meet any criteria entered, and allows selection of a specific requisition by clicking on the line desired.

this screen also allows the manager to approve timesheets from the summary line rather than looking at each individually. (timesheets being approved must be validated by the system during approval)

Bob Client Treasury

Welcome Bob Client Treasury

To Do List Print

Invoices
1 late invoice
7 invoices

Timesheet

Expenses

System Messages
 the system will be down friday, april 16, 1999 at 11 pm est for 3 hours for maintenance.

Alerts
you have late invoices

The Client AP Person Signs on and selects Invoices > Active from the Function Frame to look at the unpaid invoices

t101

this is the todo screen for a client treasury Accounts Payable person ... it has been customized for demo2 flow

there is an priority system message area on the right and a system generated to do list on the left both with clickable links
this screen shows a different client list on the function frame ... the contents of this frame are determined by the functions authorized for that user ID. -- these functions would appear on a Manager List if the manager had the authority to use them.

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Bob Client Treasury **Invoices** 7 invoices found Print

Invoice Selection List

Selected Invoices **Big Client**
(click a Row to display the invoice)

	Status	Date	Amount	Division	Invoice #
<input type="radio"/>	open	<u>04/01/1999</u>	1,320.00	Development	<u>100810</u>
<input type="radio"/>	due	<u>03/28/1999</u>	2,023.17	Operations	<u>100821</u>
<input type="radio"/>	due	<u>04/02/1999</u>	5,148.50	Big Division	<u>100825</u>
<input type="radio"/>	open	<u>04/03/1999</u>	7,000.00	Big Division	<u>100868</u>
<input type="radio"/>	open	<u>04/15/1999</u>	38,250.00	Big Division	<u>100880</u>
<input type="radio"/>	open	<u>04/02/1999</u>	45,000.00	Operations	<u>100905</u>
<input type="radio"/>	open	<u>04/05/1999</u>	48,950.00	Development	<u>100920</u>
			147,691.67		

(click a Row to display the invoice)

t101

this is the invoice selection screen for a Client A/P clerk...

it is a display and selection screen showing invoices that meet any criteria entered, and allows selection of a specific requisition by clicking on the line desired.

- (the client heading allows multiple divisions under one AP clerk - it may disappear, if this client does not allow it)
- (if the client can request a download from the screen, we must show d/l status and let them choose to d/l or d/l again)
- (if the client requires pre-approval of invoice line-items, we must indicate the approval status of an invoice and allow approve / stop approve at an invoice level (if allowed))
- (the vendor version also show multiple clients)

Bob Client Treasury

Invoices 7 invoices found

Invoice Detail List Print

Open Display

Invoice: 100880 Big Client Invoice Date: 04/15/1999
 Status: Open Big Division Due Date: 04/29/1999
 Amount **\$38,250.00**

(click a Row to display the item)

	<i>date</i>	<i>amount</i>	<i>consultant</i>	<i>vendor</i>
		<i>type</i>	<i>manager</i>	
●	04/06/1999	3,900.00	John Hathaway	Dynamic Data
		timesheet	Susan Manager	
●	04/07/1999	5,250.00	James Kerr	Tiny Consulting
		timesheet	Susan Manager	
●	04/07/1999	200.00	James Kerr	Tiny Consulting
		expense	Susan Manager	
●	04/07/1999	9,750.00	Bob Consultant	Little Vendor
		timesheet	Bob Manager	
●	04/07/1999	328.00	Bob Consultant	Little Vendor
		expense	Bob Manager	
●	04/07/1999	10,000.00	Bill Forshey	Little Vendor
		timesheet	Jill Manager	

(click a Row to display the item)

the Client A/P person reviews the list of invoice items and **clicks on the table row with Bob Consultant's timesheet** to review his hours

t101

this is the invoice item screen for a Client A/P clerk...

it is a display and selection screen showing items that make up the invoice, and allows selection of a specific item by clicking on the line desired.

the status speedometer shows the progress of the item thru the process, and may be selected to show history (if the client can request a download from the screen, we must show d/l status and let them choose to d/l or d/l again) (if the client requires pre-approval of invoice line-items, we must indicate the approval status of an item and allow approve / stop approve for invoices this user can approve)

this is the todo screen for a vendor ... it has been customized for demo1 flow

this screen shows that one person may have all roles and functions in a company

epay (i)

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Bob Vendor

(response message area)

Timesheet Search Print

Go Get It

Timesheet Selection *Enter the parameters for the search*

data	select value
client	All
status	Paid Open
Begin:	03 / 25 / 1999
End:	04 / 10 / 1999
Timesheet #:	

Go Get It

the Vendor enters the timesheet search criteria from the drop down lists and **selects** *Go Get It* to get a list of timesheets

t101

this is the timesheet search screen for a Vendor...

it is a data entry screen to input requirements for search. It has drop down lists of predefined values for each field. It also allows entry of a known timesheet number.

Bob Vendor

6 timesheets found

Timesheet Selection List Print

Selected Timesheets
(click a Row to display the timesheet)

Status	Week	Name Manager	Client Amount	Paid Hours Bill Hours
● Paid	03/29/99	Jill Golub	Finance America	35.00
		Susan Money		35.00
● Paid	03/30/99	Neerja Sadana	FFG Pharmaceuticals	40.00
		John Research		60.00
● Paid	03/30/99	Sarina Yusofe	Pinky's	10.00
		Pinky Floyd		10.00
● Paid	04/07/99	Bob Consultant	Big Client	44.00
		Bob Manager		36.00
● Paid	04/07/99	Devra Keenan	BTT	36.00
		Beth Telegraph		24.00
● Open	04/07/99	Ruchi Anand	Slow Pay, Inc	40.00
		Moe Slow		40.00

(click a Row to display the timesheet)

t101

The Vendor reviews the list of timesheets and clicks on the table row with Bob Consultant's timesheet to review his hours

this is the timesheet selection screen for a Vendor...

it is a display and selection screen showing timesheets that meet any criteria entered, and allows selection of a specific requisition by clicking on the line desired.

Bob Vendor (response message area)

Timesheet

Status

Bob Consultant Reports to: Bob Manager Big Client
 Week Ending: 04/07/1999
 Vendor Notes: Includes one vacation day and 4 hours of OT

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
Project	MX-5	Swift System Development						
	BC	2314			VC			
STD	6.0	8.0		12.0	7.0			33.0
Prem								
No Bill								
Total	6.0	8.0		12.0	7.0			33.0
Notes	ahead of schedule – beginning unit test							
Project	JBS-1	Slow System Support						
	BC	9999			VC			
STD	2.0							2.0
Prem								
No Bill					1.0			1.0
Total	2.0				1.0			3.0
Notes	problem report #2425 & 2678							
Client STD	8.0	8.0		12.0	7.0			35.0
Client Prem								
Client No Bill					1.0			1.0
Client Total	8.0	8.0		12.0	8.0			36.0
PTO			V 8.0					8.0
Total Paid	8.0	8.0	8.0	12.0	8.0			44.0

1101

this is the timesheet entry screen for the vendor

It contains multiple projects listed down the screen.
 It is for review purposes only. Any changes needed must be handled thru the adjustment process.

The client version does not show vendor-requested data.
 The vendor version does not show manager-entered data except for over-rides.

epay *it*

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Bob Vendor

(response message area)

Timesheet History

Status

Timesheet # 356356

Bob Consultant Reports to: Bob Manager Big Client

Reports to: Bob Manager Company headquarters

Week Ending: 04/07/99

Status: **Paid**

04/16/99 23:20 Payment to Vendor	ePayIT
04/15/99 18:00 Payment from Client	ePayIT
04/13/99 17:00 Invoice Data to Vendor	ePayIT
04/13/99 17:00 Invoice to Client	ePayIT
04/13/99 16:00 Invoice Created	ePayIT
04/12/99 18:30 Timesheet to Vendor	ePayIT
04/12/99 18:15 Timesheet to Client	ePayIT
04/12/99 17:20 Timesheet Cutoff	ePayIT
04/07/99 12:30 Timesheet Approved	Bob Manager Big Client
04/07/99 12:30 Timesheet Signed	Bob Consultant Little Vendor
04/07/99 11:00 Timesheet Created	Bob Consultant Little Vendor

the Vendor reviews the history and then clicks Print to get a local copy to work with.

this is the timesheet history screen for a vendor ...

it shows the vendor viewable audit trail as the timesheet was processed by ePayIT

The Status bars shows the progress.