# <u>Solutions Plus</u>

**Deliverable:** 6/20/13

**Team 4:** Alexa Dardes, Jessica Margetich, and Jordan Szenicer

Data Diagram

Business Rules/Decision Trees

Process Flows (Swim Lane)

# Billing Hours

| | |
|---|---|
| MODIFICATION DATE | 20/06/13 15:49 |
| CREATOR | Team 4: Alexa Dardes, Jessica Margetich, and Jordan Szenicer |
| FILE NAME | SolutionsPlusBilling |
| DESCRIPTION | Entities and their corresponding attributes in the billing system. |
| VERSION HISTORY | 1 |
| COMPANY | Solutions Plus |

# Specifications

## Data Masters

### Name: Client

| Field Name | Type | Values |
|---|---|---|
| **ClientID** | text | [] |
| **ClientName** | text | [] |
| **BillingAddress** | text | [] |
| **PhoneNumber** | text | [] |

### Name: Consultant

| Field Name | Type | Values |
|---|---|---|
| **ConsultantID** | text | [] |
| **FullName** | text | [] |
| **Address** | text | [] |
| **CellPhone** | text | [] |
| **WorkPhone** | text | [] |

### Name: Project

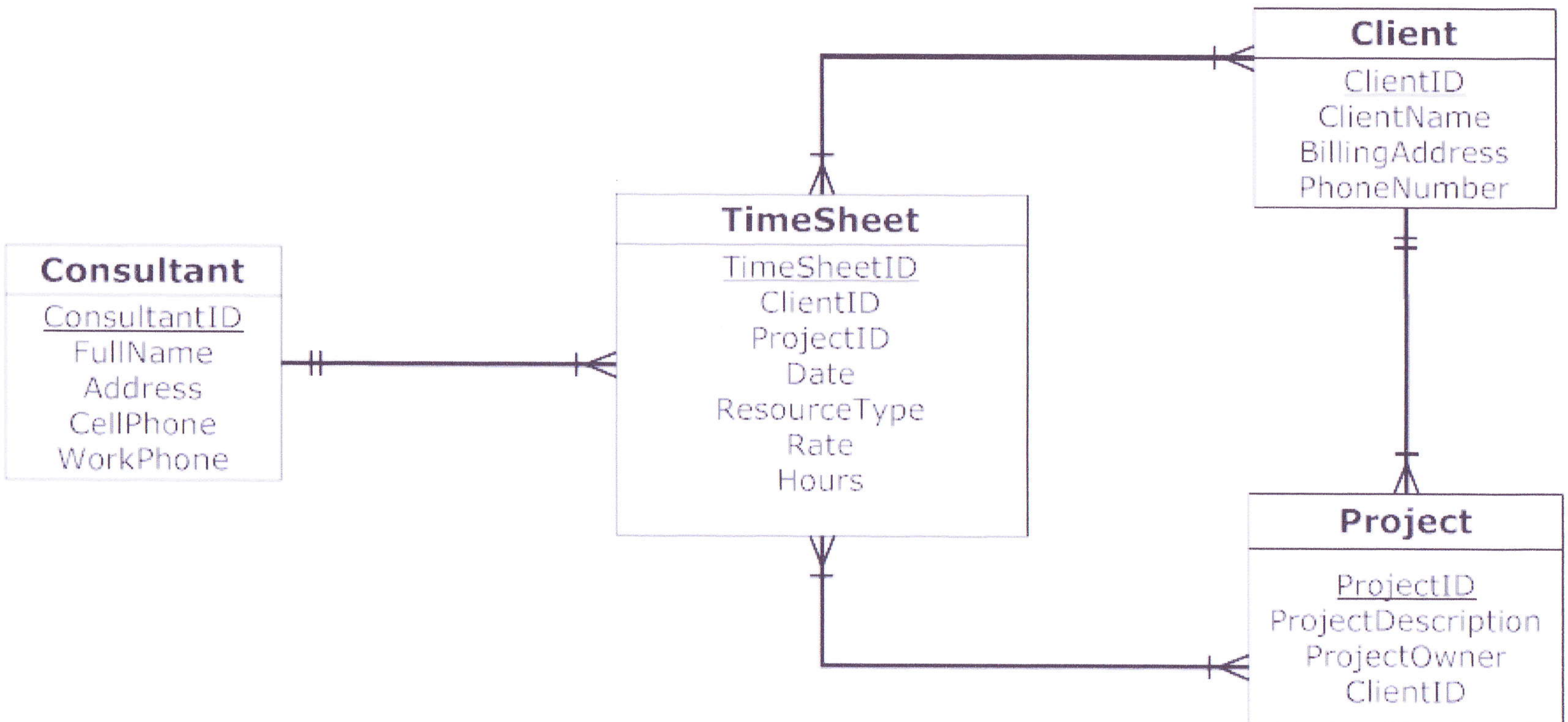
| Field Name | Type | Values |
|---|---|---|
| **ProjectID** | text | [] |
| **ProjectDescription** | text | [] |
| **ProjectOwner** | text | [] |
| **ClientID** | text | [] |

### Name: TimeSheet

| Field Name | Type | Values |
|---|---|---|
| **TimeSheetID** | text | [] |
| **ClientID** | text | [] |
| **ProjectID** | text | [] |
| **Date** | date | [] |
| **ResourceType** | multicategory | [] |
| **Rate** | text | [] |
| **Hours** | text | [] |

## Relationships

| Description | Entity | Entity | Relationship |
|---|---|---|---|
| A consultant can have many time sheets. | Consultant | TimeSheet | One to Many |
| Time sheets can be generated by one consultant. | TimeSheet | Consultant | Many to One |
| Time sheets can include many projects. | TimeSheet | Projects | Many to Many |
| Projects can be included on many time sheets. | Project | TimeSheet | Many to Many |
| Time sheets can include many clients. | TimeSheet | Client | Many to Many |
| Clients can be included on many time sheets. | Client | TimeSheet | Many to Many |
| Projects can include one client. | Project | Client | Many to One |
| One client can have many projects. | Client | Projects | One to Many |



# Business Rules

**Setup Clients:**

- **SC1** – Client setups and updates are prompted by Director requests to system administrators.
- **SC2** – System administrators must check new client requests against current system information.
- **SC3** -- Clients verified as new are entered into billing system by system administrators.
- **SC4** -- System administrators must notify directors with client ID information of all new client setups.
- **SC5** -- System administrators must notify directors of any discrepancies between new client requests and existing client information in the billing system.
- **SC6** -- System administrators must inform directors of affirmative data matches of current client IDs.
- **SC7** -- Client data in the billing system must include client ID, client name, industry description, service line description, CRM attached to the client, billing address, and phone number.

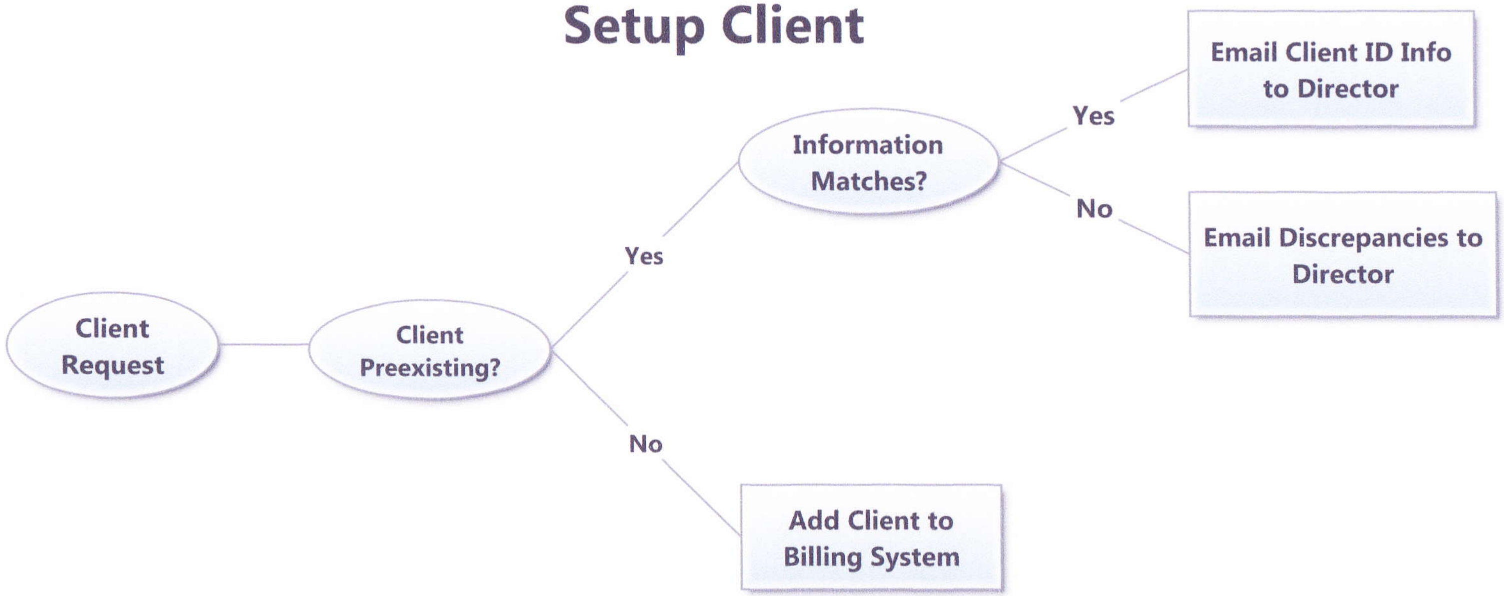
**Setup Projects:**

- **SP1** -- Project setups and updates are prompted by CRM requests to system administrators.
- **SP2** -- System administrators must check new project requests against current system information.
- **SP3** -- Projects verified as new are entered into billing system by system administrators.
- **SP4** -- System administrators must notify CRMs with project ID codes of all new project setups.
- **SP5** -- System administrators must notify CRMs of any discrepancies between new project requests and existing project information in the billing system.
- **SP6** -- System administrators must inform CRMs of affirmative data matches of current project code IDs.
- **SP7** -- Project data in billing system must include project ID, project description, project owner, and related client ID.

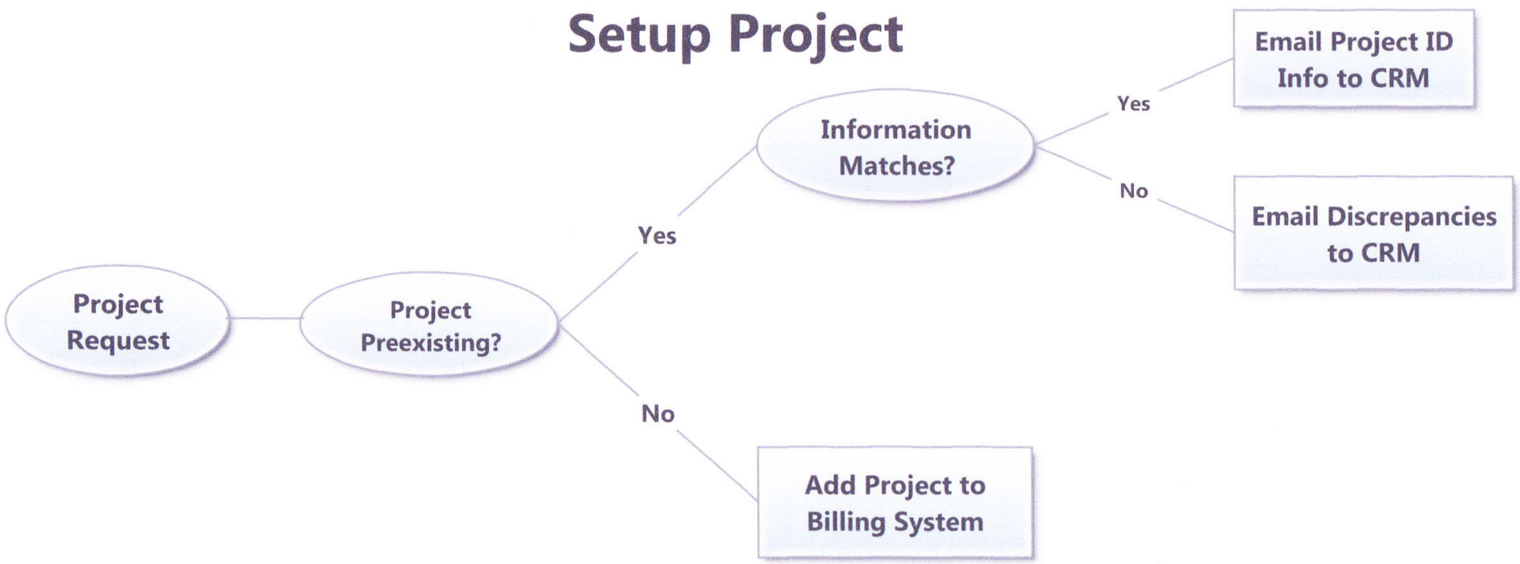
**Billing Hours:**

- **BH1** -- Consultants must request client codes and project codes from CRM.
- **BH2** -- CRMs must provide client codes and project codes to consultants upon request.
- **BH3** -- Consultants must fill out a spread sheet with a row for each day, client ID, project code, and hours.
- **BH4** -- Consultants must manually tally up their totals from their monthly spreadsheets to derive billable hours.
- **BH5** -- Consultants must e-mail CRMs with their total billable hours for review and approval.
- **BH6** -- CRMs must review billable hours submitted by consultants.
- **BH7** -- Approved billable hour submissions are entered into the billing system by CRMs.
- **BH8** -- Disapproved billable hour submissions are returned to consultants for resubmission.
- **BH9** -- Data included in billable hour submissions must include client ID, project ID, date, resource type, rate, and hours.

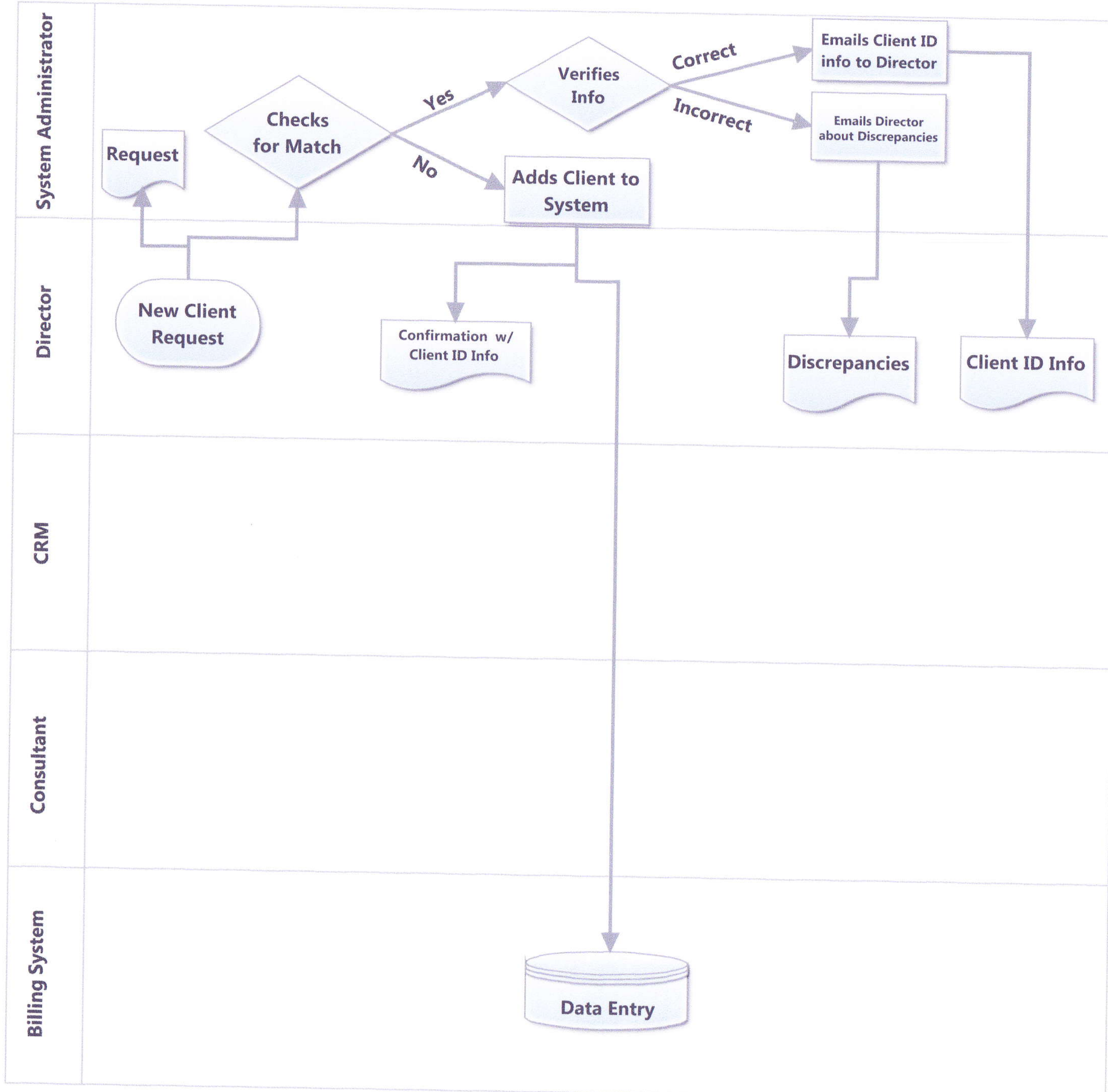
# Setup Client



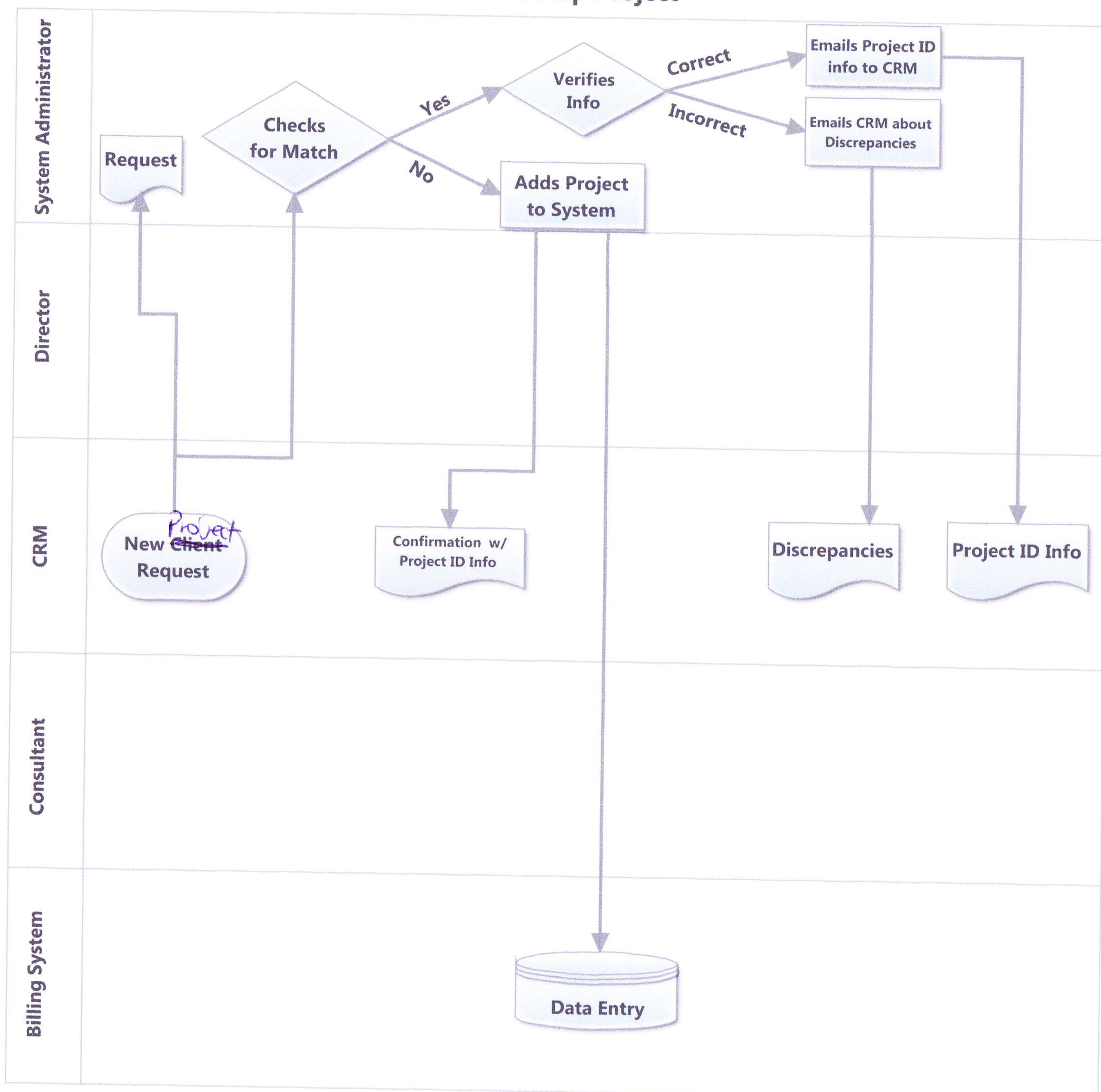

# Setup Project



# Setup Client



# Setup Project



# Billing Hours