

Submit Consultant Billing

System Use Case Specification Version 1.0

eTimeManager

Revision History

Date	Version	Description	Author
9/22/2004	1.0	Detailed	Chris Armstrong
9/28/2003	0.3	Outlined	
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Description

Allows Billing Coordinator to submit unbilled timesheets and expense reports submitted by consultants. Billing Coordinator selects items to bill and submits them to the billing system for invoice generation.

Basic Flow

1 Request to submit consultant billing

⇒ Begins when Billing Coordinator requests to submit consultant billing

2 Get unbilled items

- ✓ System retrieves list of timesheets that have been submitted but not billed
- ✓ System retrieves list of expense reports that have been submitted but not billed

3 Display billing report

- ✓ System displays list of timesheet entries by client by project
- ✓ System displays list of expense report items by client by project
- ✓ System displays total number of hours and total amount to bill per project

4 Select projects to bill

- ⇒ Billing Coordinator selects projects to bill
- For each selected project
 - ✓ System selects all timesheet entries for project to be billed
 - ✓ System selects all expense report items for project to be billed
 - Repeat for each project
- ✓ System displays amount to bill (total and per client)

5 Print billing report

- ⇒ Billing Coordinator selects to print billing report
- ✓ System prints billing report

6 Submit billing report

- ⇒ Billing Coordinator selects to submit selected items for billing
- ✓ System records submit billing request
- For each selected timesheet
 - ✓ System submits all entries for each timesheet to billing system
 - ✓ System marks all entries for each timesheet as billed
 - Repeat for each timesheet
- For each selected expense report
 - ✓ System submits all items for each expense report to billing system
 - ✓ System marks all items for each expense report as billed
 - Repeat for each expense report
- Use case ends

Alternate Flows

1 No timesheets to bill

- ✦ In Get unbilled items [Step 2], system does not find any submitted timesheets that have not been billed
- ✓ System displays message to such effect
- Continue with Get unbilled items [Step 2]

2 No expense reports to bill

- ✦ In Get unbilled items [Step 2], system does not find any submitted expense reports that have not been billed
- ✓ System displays message to such effect
- Continue with Get unbilled items [Step 2]

3 Adjust time billing

- ✦ In Select projects to bill [Step 4], Billing Coordinator chooses to adjust billing for time entries
- ⇒ Billing Coordinator selects project to adjust
- ✓ System displays individual timesheet entries for each consultant for each day for project
- ⇒ Billing Coordinator adds adjustment to consultant hours
- ⇒ Billing Coordinator submits detail adjustments
- ✓ System saves detailed adjustments
- Continue with Select projects to bill [Step 4]

4 Adjust expense billing

- ✦ In Select projects to bill [Step 4], Billing Coordinator chooses to adjust billing for expense report items
- ⇒ Billing Coordinator selects project to adjust
- ✓ System displays individual expense report items for each consultant for project
- ⇒ Billing Coordinator adds adjustment to consultant expense report items
- ⇒ Billing Coordinator submits detail adjustments
- ✓ System saves detailed adjustments
- Continue with Select projects to bill [Step 4]

5 Billing system unavailable

- ✦ In Submit billing report[Step 6], system determines that Billing System is unavailable
- ✓ System displays message to such effect
- ✓ System marks selected items as being selected for billing
- Use case ends

6 Resume suspended billing

- ✦ In Get unbilled items [Step 2], system determines that unbilled items were previously selected for billing
- ✓ System pre-selects those items
- Continue with Get unbilled items [Step 2]

7 Cancel billing

- ✦ At any time before Submit billing report [Step 6], Billing Coordinator chooses to abandon billing
- ✓ System requests confirmation from Billing Coordinator
- ⇒ Billing Coordinator confirms cancellation
- Use case ends

Special Requirements

1. Total amount to bill
 - 1.1. Show broken down by billable time and reimbursable expenses including total amount
2. Timesheet list
 - 2.1. Client
 - 2.2. Project
 - 2.3. Consultant
 - 2.3.1.Total hours
 - 2.3.2.Bill rate
 - 2.3.3.Total amount to bill
3. Expense report list
 - 3.1. Client
 - 3.2. Project
 - 3.3. Expense category
 - 3.3.1.Total reported expenses
 - 3.3.2.Total billed expenses
4. Allow item lists to be sorted by any column

- 5. Billing adjustment
 - 5.1. Consultant
 - 5.2. Billing period
 - 5.3. Work date
 - 5.4. Client
 - 5.5. Project
 - 5.6. Hours
 - 5.7. Work type
 - 5.8. Consultant notes
 - 5.9. Adjusted hours
 - 5.10. Adjustment reason
 - 5.11. Adjustment notes
 - 5.12. Adjustment date
- 6. Adjustment reason
 - 6.1. Entry error
 - 6.2. Client request
 - 6.3. Write off
 - 6.4. Manager request