Internal Process Automation Tool - Training Guide

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1. Introduction

As the Product Owner, I developed this training guide for the Internal Process Automation Tool (Jan 2024 - Jun 2024) to support HR leads and project managers in automating resource allocation for 50+ consulting teams. This 2-3 page excerpt, part of an 8-page manual, was distributed in Jun 2024, ensuring adoption and contributing to a 30% reduction in staffing time. The guide covers tasks like assigning consultants, viewing dashboards, and managing permissions.

2. Audience

- Project Managers: Assigning consultants to projects.

- HR Leads: Monitoring utilization, managing permissions.

- Consultants: Receiving assignment notifications.

3. Prerequisites

- Access to tool [tool URL].

- Login credentials (provided by IT).

- Basic computer skills.

4. Step-by-Step Instructions

Task 1: Assigning Consultants (Project Managers)

- Step 1: Log into tool with credentials.

- Step 2: Navigate to “Assignments” tab.

- Step 3: Input project requirements (e.g., SQL skills, availability).

- Step 4: Run matching algorithm and select consultant.

- Expected Result: Matches complete in <10 seconds, compatibility score shown.

- Notes: Contact IT if no matches appear (may indicate database issue).

Task 2: Configuring Notifications (HR Leads)

- Step 1: Log into tool.

- Step 2: Go to “Settings” > “Notifications.”

- Step 3: Enable email alerts for assignments.

- Step 4: Test with a sample assignment.

- Expected Result: Alerts sent within 5 minutes, include project details.

- Notes: Ensure consultant email data is updated in HR database.

Task 3: Viewing Allocation Dashboard (HR Leads)

- Step 1: Log into tool.

- Step 2: Navigate to “Dashboard” > “Utilization.”

- Step 3: View team utilization and staffing gaps.

- Step 4: Export to Excel for reporting.

- Expected Result: Dashboard refreshes in real-time, data accurate.

- Notes: Verify against HR database if gaps seem incorrect.

Task 4: Managing Permissions (HR Leads)

- Step 1: Log into tool as admin.

- Step 2: Go to “Settings” > “Permissions.”

- Step 3: Assign roles (e.g., viewer, editor) to users.

- Step 4: Test access with non-admin account.

- Expected Result: Non-admins cannot view restricted data.

- Notes: Contact IT if permission errors occur.

5. Troubleshooting

- Issue: Matching errors. Solution: Check project requirements for typos.

- Issue: No notifications. Solution: Verify email server status in settings.

- Issue: Dashboard not loading. Solution: Test on desktop or contact IT.

6. Additional Resources

- FAQ: Available on [tool URL]/faq.

- Support: Email [IT email] or call [IT number].

- Feedback: Submit via tool’s feedback form.