



**Functional Specification Document**

**For**

**Capacity Planning System Application**

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**1 REFERENCE DOCUMENT**

| **Document Name** | **Version** |
| --- | --- |
| Work force allocation FSD | 1.0 |

2 INTRODUCTION

Capacity planning system will solves the challenge of knowing our people are deployed in the right places to meet client needs and achieve business objectives.

It helps us in utilization, so we stop wondering if our team members have enough, too much, or too little work. We can ensure they are completing that work on time, and we can re-allocate them when project timelines shift. In addition, Work force helps us scale predictably.

Capacity planning system shows where we can pull resources to achieve the necessary project. This system will help/give visibility to all stack holders who is working on what and when.

Capacity planning system will also generate reports which help management to take data-driven decisions — in real time.

3 PURPOSE OF THIS DOCUMENT

This document specifies the functions that proposed solution needs to support in order to meet the high level business requirements for a simple, flexible resource management application set. This will envisage following

1. Dashboard
2. Resource Master
3. Resource Demand
4. Prioritize/Allocate Resource
5. New Joinings
6. Management Report
7. Super admin module

**4 USER ROLES**

| **User Role** | **Role Description** |
| --- | --- |
| Super Admin | The Super Admin is the person who looks after all the administrator work and above all also manages the Admin of various departments and regulate there work.He will have full access of the system and make configurable changes into the system. |
| Admin | The Admin is the second highest authorised person after Super Admin which controls entry, exit and access of other members. And make configurable changes into system as per the rights provided by the Super admin |
| HR | HR is the person who recruit & hire employees and manage & monitor employee job result.  He will key in all the employee related data into the system |
| WFA-User | It allocate resources based on the priority and generate report about corrresponding resources. |
| Reporting Manager | It perform analysis of the resource details that are allocated based on the performance. |
| Head of Delivery | It priotize the project based on the business criticality ,delivery date |
| Business Users | It is the person which provide demand and according to that ticket s will be generate. |
| Employees | It is the actual resources that work according to the project and resource planning. He will be able to see his/her details and the projects on which he/she is mapped. |

5 FUNCTIONAL REQUIREMENTS

## 5.1 RESOURCE MASTER

## 5.1.1 ADD EMPLOYEE

| Add New Employee | |
| --- | --- |
| Objective | To add a new Employee in the system. |
| Trigger\Events | Entry of new employees in the system |
| Inputs | Addition of employee details on add Employee page |
| Outputs | New employee is registered in the system/Introduction Email about the employee will be sent to all Employees |
| Functional Requirement | |
| Functional Requirement Description | Register a new Employee in the system. Field that would be mandatory to fill while registering a new employee:   * + - * 1. **Employee ID:** Auto generated employee ID         2. **First Name:** Open Text         3. **Middle Name:** Open Text (Optional)         4. **Last Name:** Open Text         5. **Reporting Manager:** Open Text         6. **Email:** Email Field         7. **Base Location:** Open Text         8. **Mobile No:** Open Text         9. **Designation:** Dropdown with all available designations         10. **Grade:** Dropdown with all available grade         11. **Role:** Dropdown with all available role         12. **DOB:** Calendar         13. **Date of Joining:** Calendar         14. **Skills:** Dropdown with checkboxes with all available skills         15. **Pan No:** Open Text         16. **Visa Details:** Open Text         17. **Passport details:** Open Text         18. **Present Address:** Text Area         19. **Permanent Address:** Text Area         20. **Previous Experience:** Number |
| Business Requirement Cross Ref | Timesheet Application |
| Business Rules | 1. All the Mandatory fields should be filled. 2. Trigger Email across the organization with Introduction of Newly added employee 3. Employee Id should be unique and generated automatically 4. Trigger email will be sent to Admin. HR, Delivery team and employee 30 days/15 days prior to expiry date of Visa/Passport |
| Business Importance | Mandatory |
| Formulas | 1. Total Experience = Previous Experience + GIC  experience  2. DOB should not be less 1995  3. VISA/Passport Expiry date should not be >Todays() |

**5.1.2 EDIT EMPLOYEE**

| Edit Employee Master | |
| --- | --- |
| Objective | To rectify any human error incur during addition of Employee or to Update VISA/Passport or any other details |
| Trigger\Events | Updating details of the employee |
| Inputs | Any fields of Employee Master |
| Outputs | Employee record updated/Email sent to the employee |
| Functional Requirement | |
| Functional Requirement Description | Update employee master system:   * + - * 1. **First Name:** Open Text         2. **Middle Name:** Open Text (Optional)         3. **Last Name:** Open Text         4. **Reporting Manager:** Open Text         5. **Email:** Email Field         6. **Base Location:** Open Text         7. **Mobile No:** Open Text         8. **Designation:** Dropdown with all available designations         9. **Grade:** Dropdown with all available grade         10. **Role:** Dropdown with all available role         11. **DOB:** Calendar         12. **Date of Joining:** Calendar         13. **Skills:** Dropdown with checkboxes with all available skills         14. **Pan No:** Open Text         15. **Visa Details**: Open Text         16. **Passport details**: Open Text         17. **Present Address:** Text Area         18. **Permanent Address:** Text Area         19. **Previous Experience:** Number |
| Business Requirement Cross Ref | Timesheet Application |
| Business Rules | 1. Total Experience = Previous Experience + GIC experience  2. DOB should not be less 1995  3. VISA/Passport Expiry date should not be > Todays() |
| Business Importance | Mandatory |
| Formulas | NA |

**5.1.3 VIEW EMPLOYEE**

| View Employee Master: | |
| --- | --- |
| Objective | GUI to view updated details of the Employee |
| Trigger\Events | All the employee details will be visible |
| Inputs | NA |
| Outputs | Detail of Employee |
| Functional Requirement | |
| Functional Requirement Description | Below mentioned details will be visible to the delivery team/HR team about the employees  1. Name of employee  2. Email ID  3. Skill set  4. General Information   * Designation * Total Experience * Primary Skills * Current Assignment (Name & Release Date) * Next Assignment (Name & Tentative Start Date) * Current Utilization * Passport (Availability & Expiry Date) * Any Planned Leave (Start & End Date)   5. Education   * 10th Details * 12th Details * Graduation Details |
| Business Requirement Cross Ref | Work force allocation sheet |
| Business Rules | NA |
| Business Importance | Mandatory |
| Formulas | NA |
| Test Verification | Correct information should be shown on list view |

### 5.1.4 DELETE AN EMPLOYEE

| Delete Employee: | |
| --- | --- |
| Objective | To delete an employee record |
| Trigger\Events | The employee has become obsolete/ is no longer required |
| Inputs | NA |
| Outputs | The employee is removed/ become dormant |
| Functional Requirement | |
| Functional Requirement Description | Delete an employee in the system:   1. Warning message would show before deletion |
| Business Requirement Cross Ref | NA |
| Business Rules | 1. Allowed only for users with valid credentials/only User with HR role will be able to delete an employee |
| Business Importance | Mandatory |
| Formulas | NA |
| Test Verification | 1. Deleted employee should not be shown on the employee list. 2. All reports should show the changes occur for employee 3. Record will not be deleted physically from the system |

## 5.2 RESOURCE DEMAND

## 5.2.1 ADD RESOURCE DEMAND

| Add New Resource Demand | |
| --- | --- |
| Objective | To add a new resource demand in the system. |
| Trigger\Events | New resource demand generated with a ticket number |
| Inputs | Addition of resource demand details on add Resource Demand page |
| Outputs | New resource demand is registered in the system/Email about the resource will be sent to all Employees |
| Functional Requirement | |
| Functional Requirement Description | Log a new resource requirement. Field that would be mandatory to fill while creating a new resource:   1. **Request ID:** Auto generated request ID 2. **Account:** Dropdown with all available account 3. **Region:** Dropdown with all available region 4. **Country:** Dropdown with all available country 5. **City:** Dropdown with all available city 6. **Opportunity Type:** Dropdown with all available opportunity type 7. **Sales Stage:** Dropdown with all available sales stage 8. **Process Name:** Open text 9. **Resource Type:** Dropdown with all available resource type 10. **No of Resources:** Number 11. **Tool/Domain Knowledge:** Dropdown checkboxes with all available skill 12. **Start Date:** Calendar 13. **End Date:** Calendar |
| Business Requirement Cross Ref | Capacity Planning sheet for reference |
| Business Rules | 1. All the Mandatory fields should be filled. 2. Trigger email will be sent to WFA group and Head of delivery about the resource request with the details 3. Resource Id should be unique and generated automatically 4. Trigger email will be sent to Admin. HR, Delivery team |
| Business Importance | Mandatory |
| Formulas | 1. Start date should not be < Todays()  2. End date should not be < Todays() |

**5.2.2 EDIT RESOURCE DEMAND**

| Edit Resource Demand | |
| --- | --- |
| Objective | To rectify any human error incur during addition of resource demand or to Update any other details |
| Trigger\Events | Updating details of the resource demand |
| Inputs | Any fields of Resource Demand |
| Outputs | Resource demand updated/Email sent to the employee |
| Functional Requirement | |
| Functional Requirement Description | Update resource demand:   1. **Account:** Dropdown with all available account 2. **Region:** Dropdown with all available region 3. **Country:** Dropdown with all available country 4. **City:** Dropdown with all available city 5. **Opportunity Type:** Dropdown with all available opportunity type 6. **Sales Stage:** Dropdown with all available sales stage 7. **Process Name:** Open text 8. **Resource Type:** Dropdown with all available resource type 9. **No of Resources:** Number 10. **Tool/Domain Knowledge:** Dropdown checkboxes with all available skill 11. **Start Date:** Calendar 12. **End Date:** Calendar |
| Business Requirement Cross Ref | Timesheet Application |
| Business Rules | 1. Start date should not be < Todays()  2. End date should not be < Todays() |
| Business Importance | Mandatory |
| Formulas | NA |

**5.2.3 VIEW RESOURCE DEMAND**

| View Resource Demand: | |
| --- | --- |
| Objective | GUI to view updated details of the Resource Demand |
| Trigger\Events | All the resource demand details will be visible |
| Inputs | NA |
| Outputs | Detail of Resource Demand |
| Functional Requirement | |
| Functional Requirement Description | Below mentioned details will be visible to the delivery team/HR team about the resource   * Account * Region * Country * City * Opportunity Type * Sales Stage * Process Name * Resource Type * No of Resources mapped with resource name * Tool/Domain Knowledge * Start Date * End Date * Status |
| Business Requirement Cross Ref | Work force allocation sheet |
| Business Rules | NA |
| Business Importance | Mandatory |
| Formulas | NA |
| Test Verification | Correct information should be shown on list view |

### 5.3 PRIORITIZE/ALLOCATE RESOURCE

### 5.3.1 SET PRIORITY

| Set Priority of Project: | |
| --- | --- |
| Objective | To prioritize a project |
| Trigger\Events | Project prioritized |
| Inputs | Ticket ID of resource |
| Outputs | Project will be prioritized/Email sent to the Delivery team |
| Functional Requirement | |
| Functional Requirement Description | Prioritize a project in the system. Field that would be mandatory to fill while prioritizing a project:   1. Ticket ID of resource 2. Type of priority |
| Business Requirement Cross Ref | NA |
| Business Rules | 1. Project prioritizing should be according to the requirement. 2. Prioritization allowed only for users with valid credentials/ Delivery team |
| Business Importance | Mandatory |
| Formulas | NA |
| Test Verification | 1. Priority of the project should be shown on the prioritize project list. 2. All project prioritized according to the requirement |

### 5.3.2 ALLOCATE RESOURCE

| Allocate resources to the project: | |
| --- | --- |
| Objective | To allocate resource for project |
| Trigger\Events | Required resources allocated to the project |
| Inputs | Resource details |
| Outputs | Allocated resources details/Email sent to the delivery team and employee |
| Functional Requirement | |
| Functional Requirement Description | Allocate resources to the project. Field that would be mandatory to fill while allocating resources to the project:   1. Resource Type 2. No of resources 3. Tool/Domain Knowledge 4. Start Date 5. End Date 6. Status 7. Priority 8. Resource Name 9. Availability |
| Business Requirement Cross Ref | NA |
| Business Rules | 1. Resources should be allocated if it is required i.e. resource optimization 2. Resources should be allocated if it is available. 3. Allocation allowed only for users with valid credentials |
| Business Importance | Mandatory |
| Formulas | NA |
| Test Verification | 1. Allocated resources should be shown on the allocated resources list. 2. All resources should show the status of the allocation. |

## 5.4 NEW JOININGS

### 5.4.1 ADD NEW JOINER

| Add New Joiner: | |
| --- | --- |
| Objective | To add new joiners to the system |
| Trigger\Events | Entry of new joiners in the system |
| Inputs | Addition of new joiner details on add new joiner page |
| Outputs | New joiner is added in the system/Email about the joiner sent to the HR and employees |
| Functional Requirement | |
| Functional Requirement Description | Register a new joiner in the system. Field that would be mandatory to fill while registering a new joiner:   1. **First Name:** Open Text 2. **Last Name:** Open Text 3. **Designation:** Dropdown with all available designations 4. **Date of Joining:** Calendar 5. **Location:** Dropdown with all available location 6. **Skills:** Dropdown of checkbox with all available skills 7. **Experience:** Number 8. **Interviewed by:** Open text |
| Business Requirement Cross Ref | NA |
| Business Rules | 1. All the Mandatory fields should be filled.  2. Trigger Email across the organization with Introduction of Newly added joiner  3. Trigger email will be sent to Admin. HR, Delivery team and employee prior to addition of new joiner |
| Business Importance | High |
| Formulas | NA |
| Test Verification | 1. DOB should not be less 1995. 2. Joining date should not be > Todays(). |

**5.4.2 EDIT NEW JOINER**

| Edit New Joiner: | |
| --- | --- |
| Objective | To rectify any human error incur during addition of new joiner or to update any other details |
| Trigger\Events | Updating details of new joiner |
| Inputs | Any fields of new joiner details |
| Outputs | New joiner record updated/Email sent to the HR and employee |
| Functional Requirement | |
| Functional Requirement Description | Updating new joiner in the system:   1. **First Name:** Open Text 2. **Last Name:** Open Text 3. **Designation:** Dropdown with all available designations 4. **Date of Joining:** Calendar 5. **Location:** Dropdown with all available location 6. **Skills:** Dropdown of checkbox with all available skills 7. **Experience:** Number 8. **Interviewed by:** Open text |
| Business Requirement Cross Ref | NA |
| Business Rules | All the Mandatory fields should be filled. |
| Business Importance | High |
| Formulas | NA |

### 5.4.3 DELETE A NEW JOINER

| Delete New Joiner: | |
| --- | --- |
| Objective | To delete a new joiner record |
| Trigger\Events | The new joiner has become obsolete/ is no longer required |
| Inputs | NA |
| Outputs | The new joiner is removed/ become dormant |
| Functional Requirement | |
| Functional Requirement Description | Delete a new joiner in the system:   1. Warning message would show before deletion. |
| Business Requirement Cross Ref | NA |
| Business Rules | 1. Allowed only for users with valid credentials/only User with HR role will be able to delete new joiner. |
| Business Importance | Mandatory |
| Formulas | NA |
| Test Verification | 1. Deleted new joiner should not be shown on the new joiner list. 2. All reports should show the changes occur for employee 3. Record will not be deleted physically from the system |

## 5.7 SUPER ADMIN MODULE

## 5.7.1 ADD RECORD OF A FIELD

| Add Record | |
| --- | --- |
| Objective | To add a new record of a field in the system. |
| Trigger\Events | Entry of new record of the field in the system |
| Inputs | Name of new record on add Field Name page |
| Outputs | New record added in the system |
| Functional Requirement | |
| Functional Requirement Description | Add a new record of a field in the system. Field that would be mandatory to fill while adding a new record of a field:   1. **Account:** Open text 2. **Country:** Open text 3. **City:** Open text 4. **Designation:** Open text 5. **Grade:** Open text 6. **Opportunity Type:** Open text 7. **Priority:** Open text 8. **Region:** Open text 9. **Sales Stage:** Open text 10. **Skills:** Open text 11. **Status:** Open text |
| Business Requirement Cross Ref | NA |
| Business Rules | 1. All the Mandatory fields should be filled. 2. Addition allowed only for admin 3. New field should not be null |
| Business Importance | Mandatory |
| Formulas | NA |

## 5.7.1 EDIT RECORD OF A FIELD

| Edit Record | |
| --- | --- |
| Objective | To edit a new record of a field in the system. |
| Trigger\Events | Updating new record of the field in the system |
| Inputs | Name of record on edit Field Name page |
| Outputs | Record updated in the system |
| Functional Requirement | |
| Functional Requirement Description | Update a record of a field in the system. Field that would be mandatory to fill while updating a record of a field:   1. **Account:** Open text 2. **Country:** Open text 3. **City:** Open text 4. **Designation:** Open text 5. **Grade:** Open text 6. **Opportunity Type:** Open text 7. **Priority:** Open text 8. **Region:** Open text 9. **Sales Stage:** Open text 10. **Skills:** Open text 11. **Status:** Open text |
| Business Requirement Cross Ref | NA |
| Business Rules | 1. All the Mandatory fields should be filled. 2. Updating allowed only for admin 3. Updating field should not be null |
| Business Importance | Mandatory |
| Formulas | NA |

## 5.7.1 DELETE RECORD OF A FIELD

| Delete Record | |
| --- | --- |
| Objective | To delete a record of a field in the system. |
| Trigger\Events | Delete a record of the field in the system |
| Inputs | NA |
| Outputs | Record is removed from the system |
| Functional Requirement | |
| Functional Requirement Description | Delete a record of a field from the system:   1. Warning message would show before deletion |
| Business Requirement Cross Ref | NA |
| Business Rules | Deletion allowed only for admin |
| Business Importance | Mandatory |
| Formulas | NA |

## 5.8 SEARCH RESOURCE

**5.4.1 SEARCH RESOURCE WITH DIFFERENT PARAMETERS**

| SEARCH RESOURCE: | |
| --- | --- |
| Objective | To search a resource in the system |
| Trigger\Events | Searching of resource by given parameter |
| Inputs | Any field from the following parameter:   * Date * Location * Skill set * Experience * Billability index * Role and Designation * Ticket ID * Resource ID |
| Outputs | The details of the required resource will show from the system if present |
| Functional Requirement | |
| Functional Requirement Description | Searching of resources in the system with different parameters: |
| Business Requirement Cross Ref | NA |
| Business Rules | 1. Allowed only for users with valid credentials will be able to search resource. |
| Business Importance | Mandatory |
| Formulas | NA |
| Test Verification | 1. Searched resource should be show if it is in the system |

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