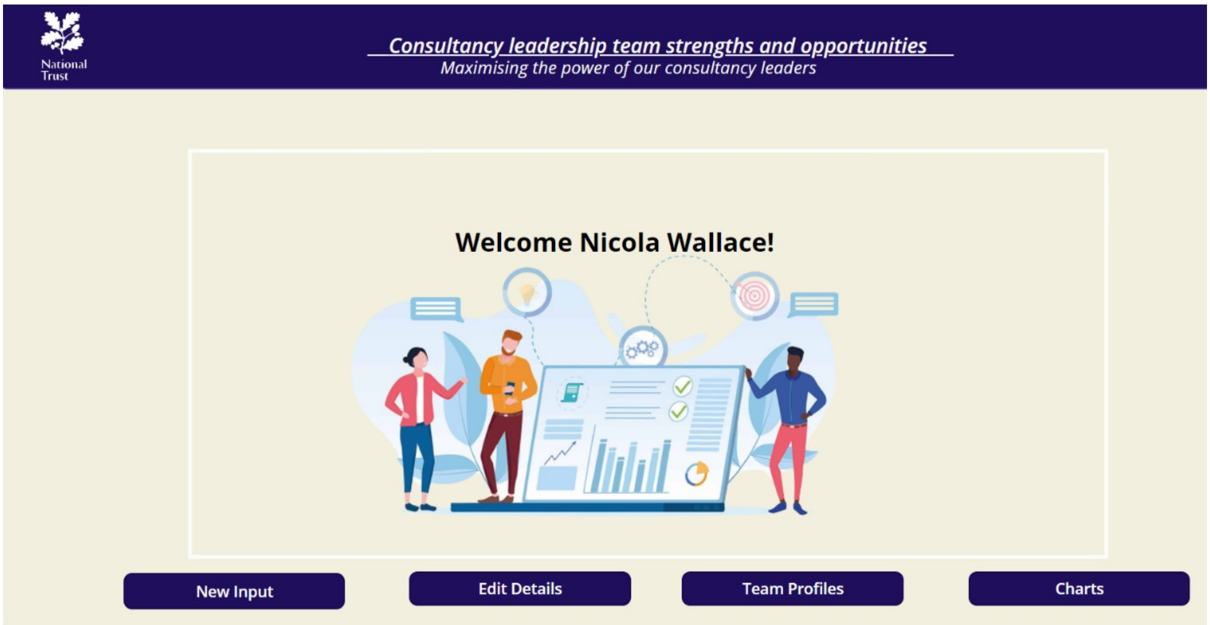
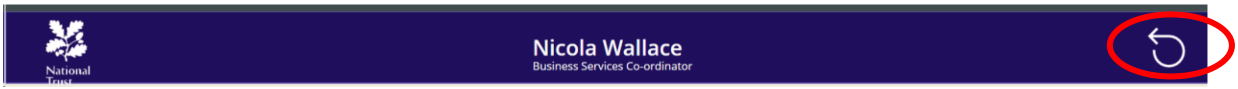
Consultancy Visibility and Capacity Toolkit User Guide



The purpose of the Consultancy Visibility and Capacity Toolkit is to provide the Consultancy leadership team an overview of their workloads and projects they are working on, whilst also giving them the opportunity to highlight their areas of expertise and areas they would like to grow in. This user guide will give a brief overview of the application and how to maximise the effectiveness of its use.

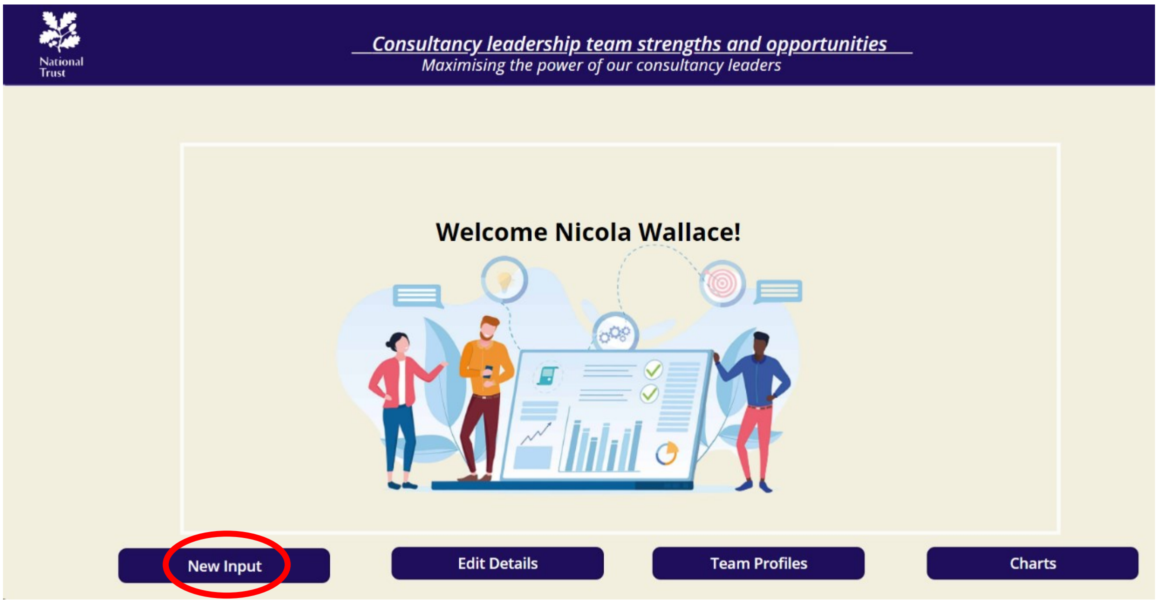
Basic functions



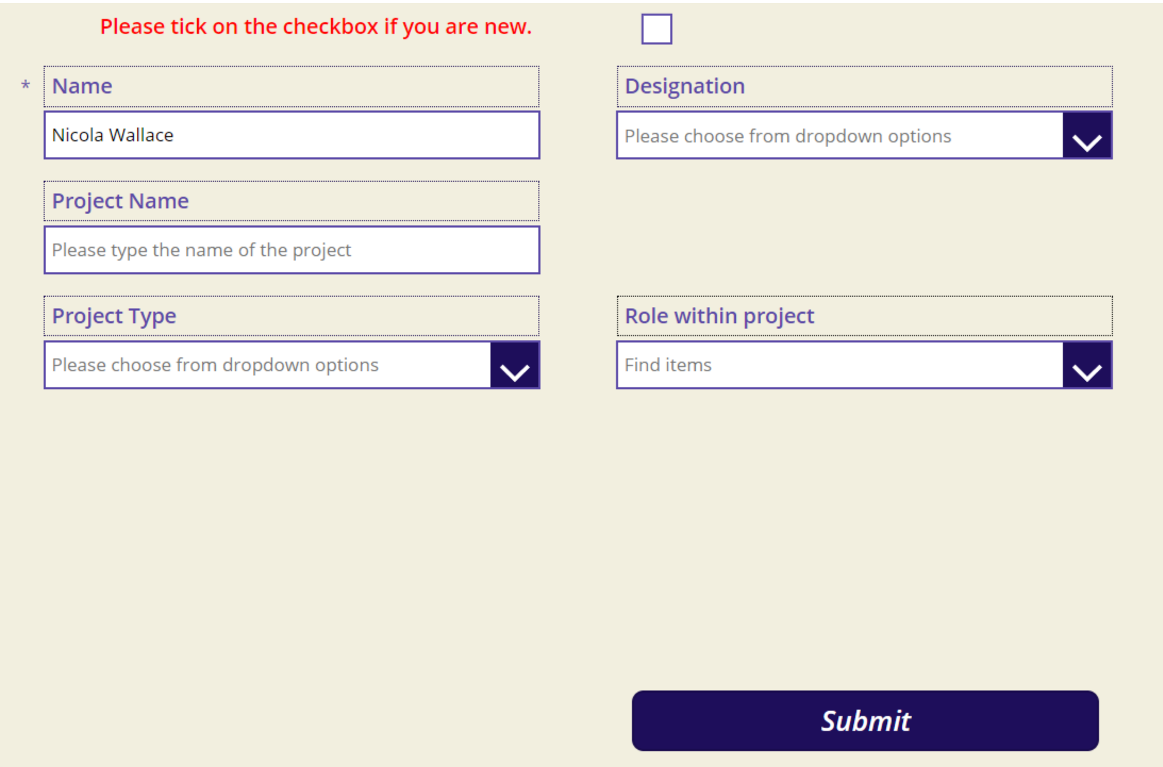
After clicking on a page, use the arrow in the top right corner to return to the homepage.

New Input

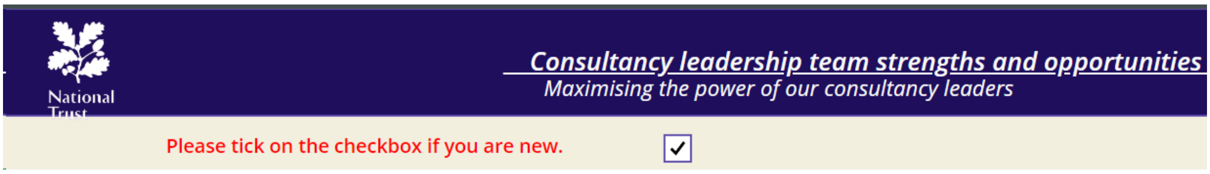
Navigate to the 'New Input' screen to add details of a new project you are working on, or to add your details if you are new to the Consultancy leadership team.



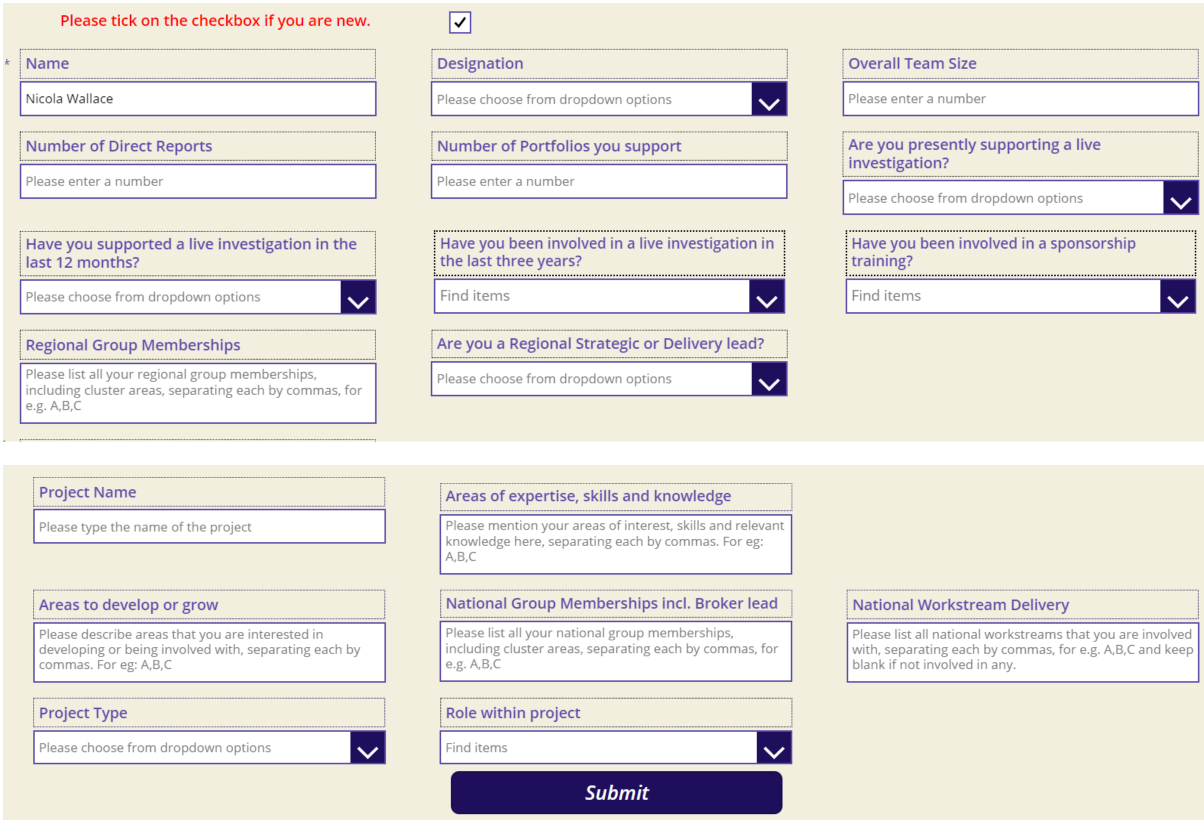
The initial screen is needed to add new project details. Once here, you can add the project name, type, your role within the project, and your job title. By pressing submit, this will save the project details to your profile on the app.



If you are new and need to add details to your profile, check the box at the top of the screen.

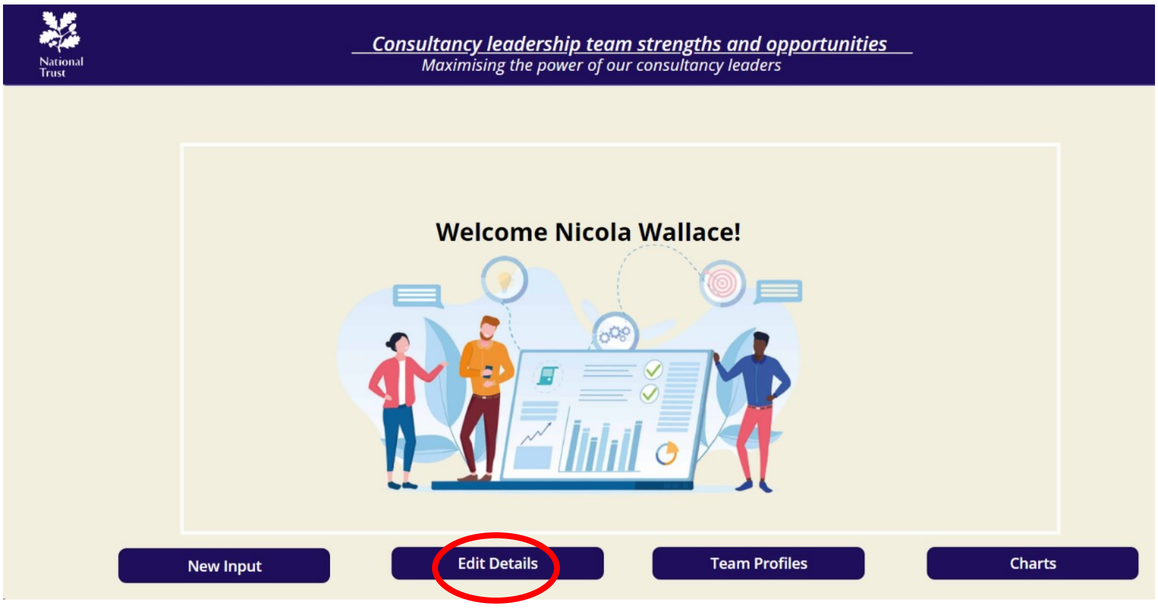


This will bring up a longer form to capture all details of your team, your areas of expertise, areas to grow, and other details.



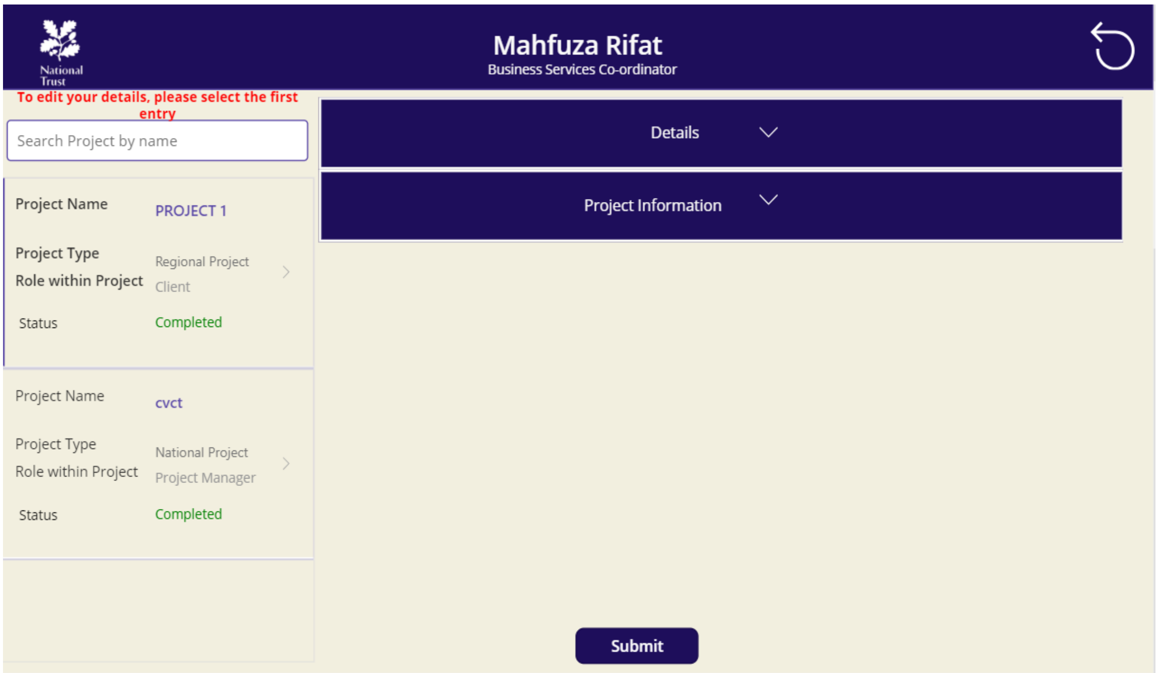
Again, pressing submit will add these details to your profile on the app. Click the return arrow in the top right corner to return to the main ‘Welcome’ page.

Edit Details

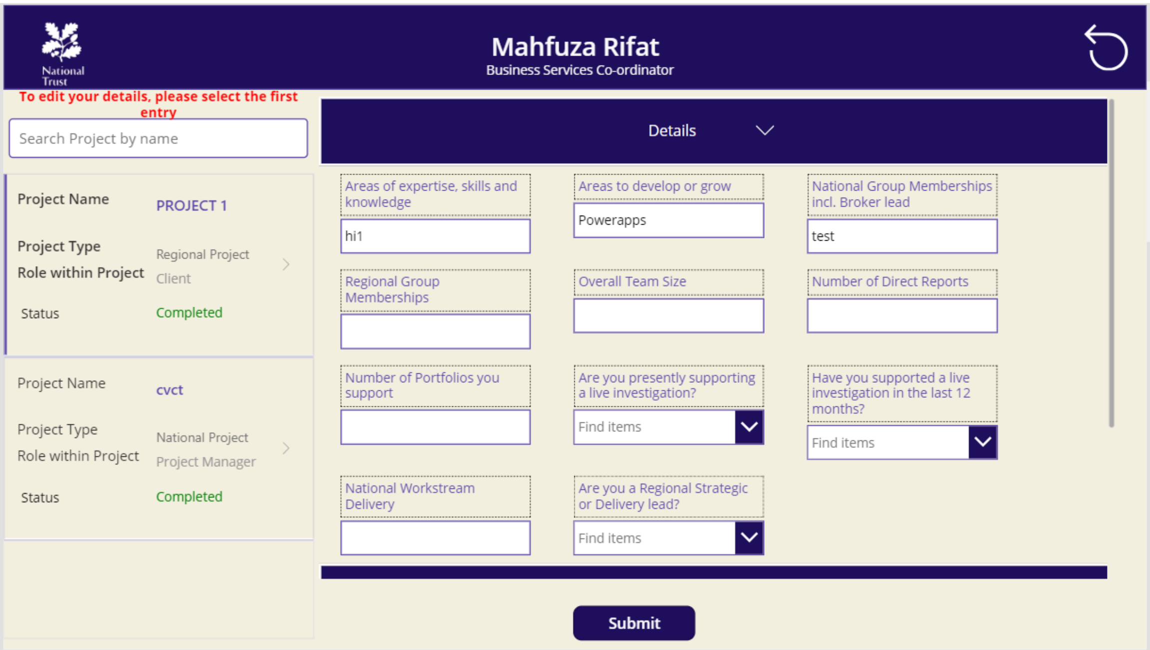


Navigate to the ‘Edit Details’ screen to update the details of the projects you are working on.

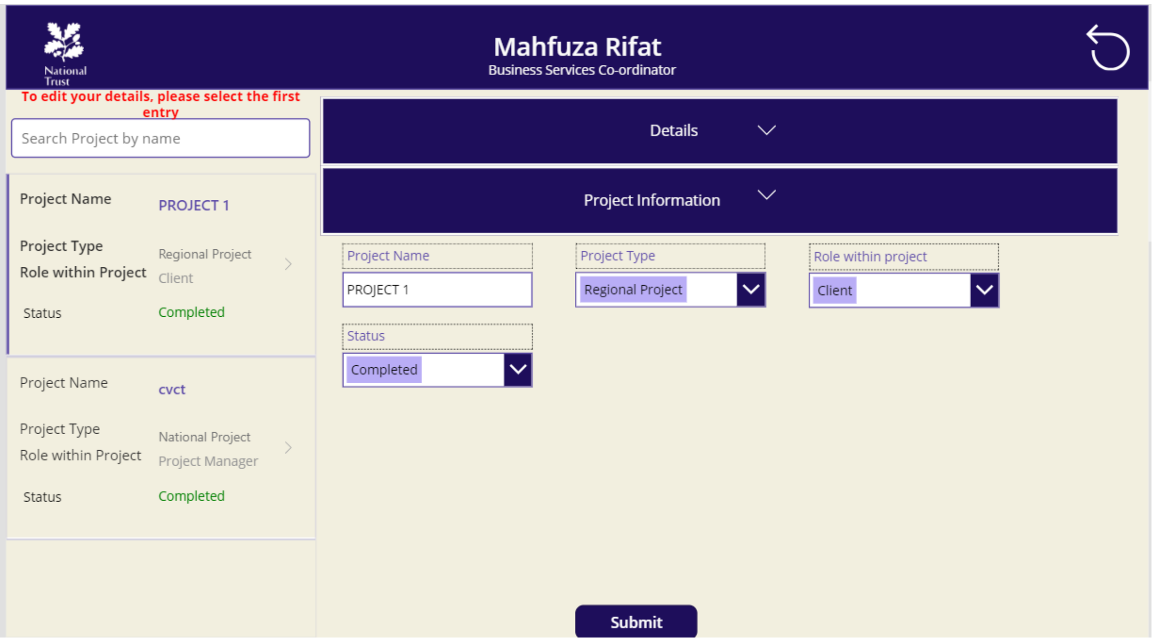
Choose the first project from the left-hand side and expand the ‘Details’ section by selecting the down arrow next to the title.



This will reveal all the information inputted against the original form. For all other projects, the ‘Details’ screen will contain no information. Therefore, to edit any details, always click on the first project on the left-hand side and update the information where required.



The ‘Project Information’ section will contain the information relating only to projects. On the left-hand side, you can click on each of the projects to update their statuses to ‘Ongoing’ or ‘Completed’ in the ‘Project Information’ section.



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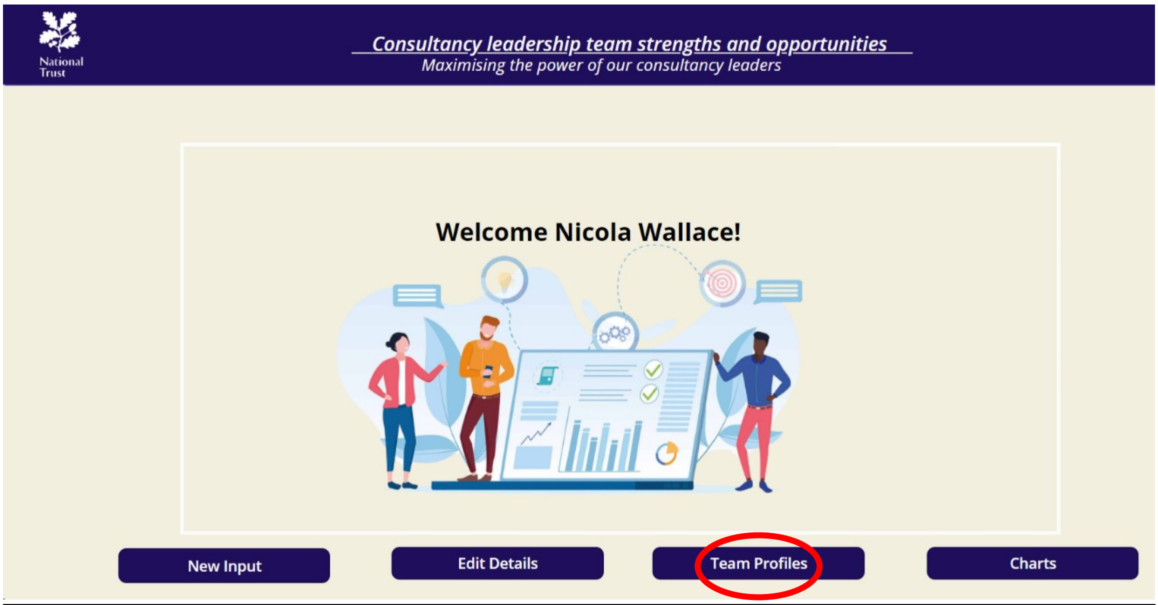
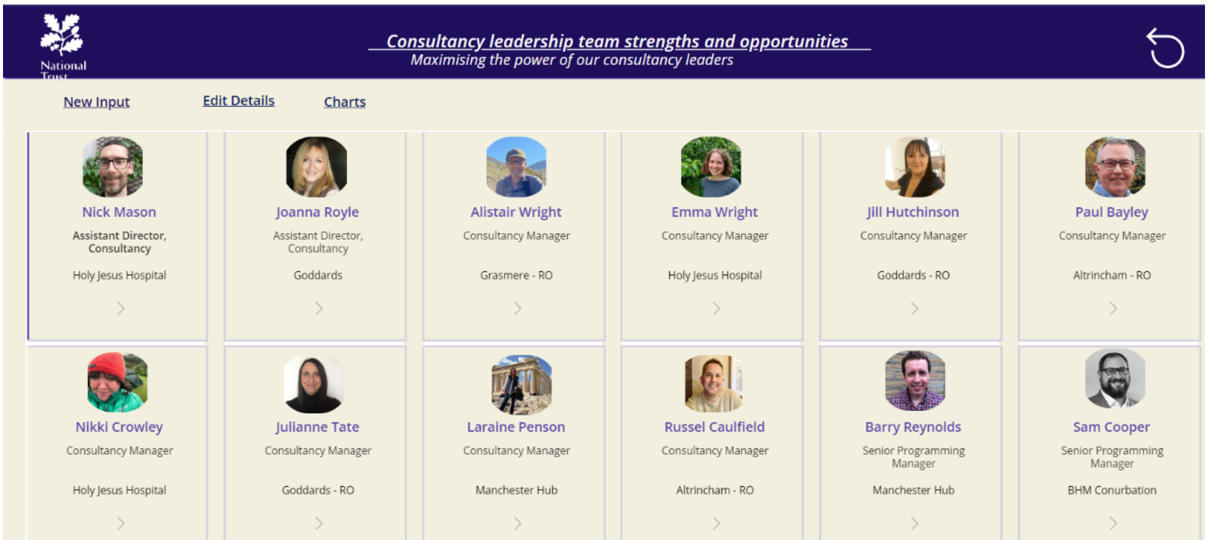
Team Profiles

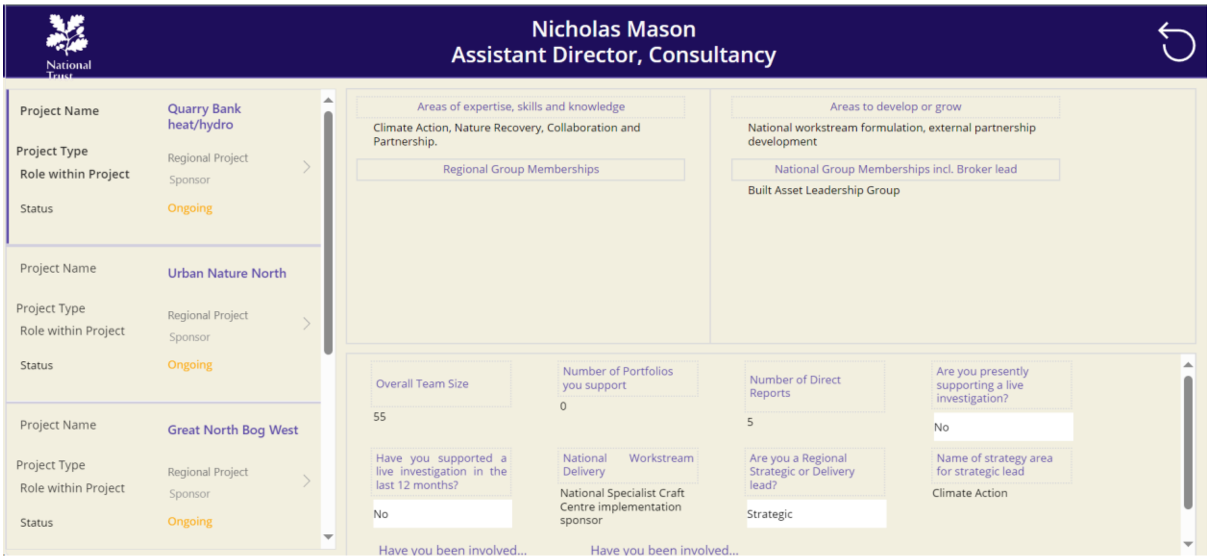


Navigate to the 'Team Profiles' page to see all North Consultancy team members, their job titles, and their work location.

The other screens can also be navigated to using the buttons at the top of the screen ('New input', 'Charts' & 'Edit Details').



By clicking on a team member's profile, it will bring up the information that they inputted against the initial form, as well as information on projects they are working on and the statuses of these.



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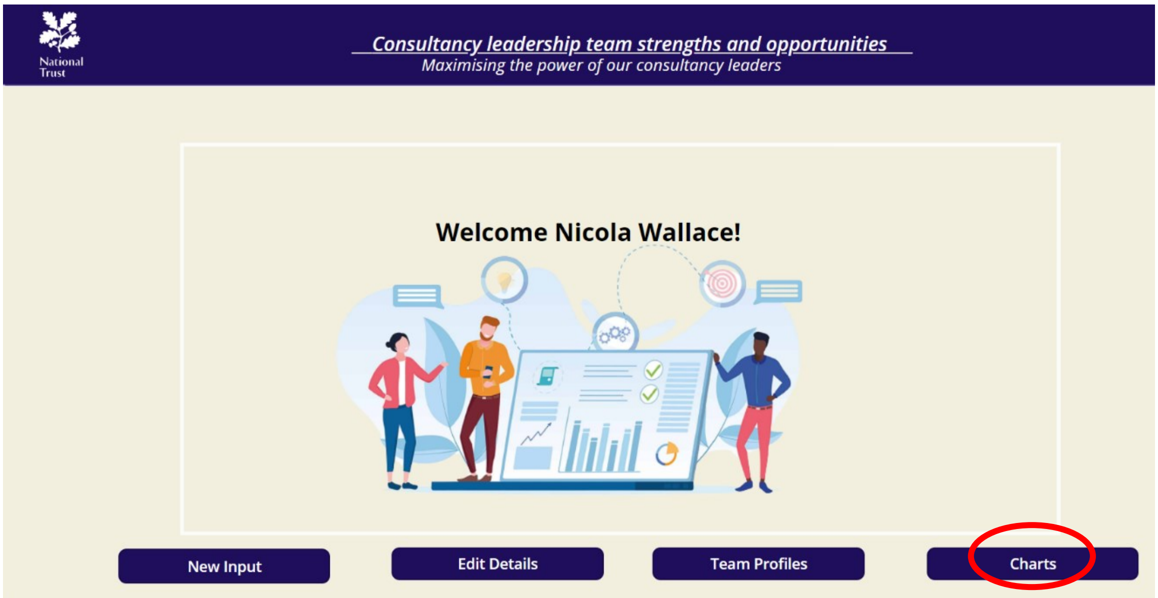
Charts



To see team data at a glance and in more detail, navigate to the 'Charts' page. This will take you to Power BI (a Power BI license is required to access these charts, a separate how to guide has been created with the information on request access). From here, you will be able to see the overall headlines for each member of the North Consultancy leadership team, as well as delve into more detail on specific queries.