

CROWDED EVENTS

Headcount Module



Introduction: Headcount

- The idea of the headcount module is to calculate the number of people to recruit to fulfill a position and therefore be required in any place at any one time.
- Required numbers can be inputted and the module will be able to calculate the **total demand** for that position, according to wider rules against each workforce type e.g working hours etc.
- Peak shift demand refers to the maximum number of people required on shift in that position, at any one time. This impacts the future scheduling & rostering module.
- System should track any changes to the headcount as per each organisational review cycle, as operational requirements are confirmed
 - This should be available in dashboard format as well as a detailed change log
- Should have the ability to add a Function and Role Description
- Only Super User/Admin can access this module – however may only apply to some Super Admins and not all

Terminology: Headcount



Term	Meaning	Note	Example
Functional Area (FA)	A segment of the organisation with a similar group of job titles , like a department	Needs to include space for an acronym e.g Security (SEC)	Security / Transport / Protocol / Human Resources
Role	Job Title that an individual can be assigned to	Job Titles when created should also allow a unique code SEC001 - Manager	
Venue	A geographical location for a position	Needs to include space for an acronym	
Workforce Type	Contractor , Paid Staff		
Position	A position is made up of Function/ Job Title & Venue	Super Admin should be able to upload / view Role / Functions and Venues to help create positions in headcount	Function – Transport Role – Manager Venue – Bus Deport = Position
Reporting Line	Which role does the position report into	Should be selected from a dropdown from roles that sit within that function	
Shift	A shift is the specific locations with a date, start and finish time. Each shift is limited to a specific position.		Thursday 2nd Aug 2022 0900-1600 = Shift
Peak Shift	The maximum number of people required on shift in that position, at any one time		
Multiplier	A multiplier is applied to the peak shift demand to then calculate the total demand.	FYI ONLY FOR VOL DEVELOPMENT FUTURE DEVELOPMENT	
Total Demand	Total Number to be assigned against the position		
Org Chart	A graphic images showing the structure of a Function showing reporting lines of positions	Can be generated by Venue / Function	
Start Date & Finish Date	Start and end date of the position		



How does Headcount impact other Modules?

Module	Impact
Assignments	Headcount ensures that the right number of workforce are recruited against the role. For example if the headcount is 20 for a position then 21 contractors cannot be assigned to this role.
Scheduling & Rostering	The Scheduling and Rostering implementation is an extension to the existing workforce management platform. In this module, you can create shifts for a particular position. Once the shifts have been created, you can then roster participants to a shift based on the headcount demand.

CROWDED EVENTS

FUNCTIONALITY SPRINT
Headcount Module

Navigation



The Module should be split into the following tabs:

- **Summary** - gives you an overview of the Headcount Statistics including how the headcount has changed, the total headcount at different intervals, and the headcount breakdown according to factors such as Venue, Zone, Functional Area, Workforce Type.
- **Functional Areas** - this gives you an overview of the different FAs and the Job Titles owned by them - this is where you can add new FAs and Job Titles ready to import positions.
- **Venues** - This gives you an overview of the Venues in the system and what Zone they belong to (NB - if Zone field here is blank it should be created in Zone tab).
- **Departments** - allows you to group together FAs into Departments.
- **Zones** - editing Zones allows you to choose which Zone a Venue comes under.
- **History** - allows you to view most recent changes made to positions in Headcount

FA, Job Title & Venues

A position is made up of Functional Area / Job Title & Venue e.g Transport , Manager , Bus Depot

Before a position can be added manually or uploaded into CrowdWRK. Functional Areas , Job Titles and Venues must already exist.

The Functional Areas tab under headcount should give an overview of the different FAs and the Job Titles owned by them - this is where Superadmin can add new FAs and Job Titles ready to import positions.

FA code	Functional Area	Job Title	Role Code
TPT	Transport Operations	Transport Manager	TPTP001
GSE	Guest Services	Guest Operations Coordinator	GSEC001

Venues can be created in the venue tab.

Venue Code	Venue
STA	Stadium
BD1	Bus Depot

Importing Positions



The following fields should be contained in an excel file for import (an import template can be found on the import page):

- FA Code
- Venue Code
- Workforce Type
- Job Title
- Start Date(Operational Dates)
- Finish Date (Operational dates)
- Total Demand
- Peak Shift
- Shifts per day (e.g. total number of shifts per day)

Separate imports of Venues and Functional Areas should also be available to do. New Venues and FAs can be imported as part of main position import but importing them separately into the system first will ensure best results. TBD

The system will recognize whether:

- A position being imported already exists in the system;
- A position already exists but there has been a change made to one of the fields;
- A position contains new information e.g. a new venue, functional area or job title (and give you the opportunity to add this data during the import).

Please note that importing should only be done by Bootup / Super Admin access.



Manual Adding of positions

Functionality to manually add a positions should be included.

When adding a position, a series of dropdowns should prepopulate. For example, if you are building a position under Transport and select the workforce type “Contractor” then the job title drop down field should be populated to show all contractor job titles under transport.

Mandatory fields on this window should be the following:

- Select Functional Area
- Select workforce type
- Select Job Title
- Select Venue
- Input total demand
- Input Peak shift
- Number of shifts per day
- Operational Dates

Not mandatory

- Reports to (Line manager)

Headcount Management



In order to view or change the headcount for a particular position, you will need to access that position in the Headcount > Manage tab (TBD). In here either look for the position in question under the relevant FA or find it using the filter tool, where you can select certain parameters, you know for the position or search by Job Title.

Once you have found the position you're looking for, select Edit position from the dropdown menu ,you are then able to edit the following fields:

- **Functional Area**
- **Workforce Type** (Paid Staff / Contractors)
- **Position Role** (Job Title)
- **Venue**
- **Total Demand**
- **Peak Shift**
- **Operational Dates** - this field is available for Super admins only.
- **Shift Times** (number of shifts per day)
- **Line Manager**

A Super admin has permission to edit a position, and then simply hit "Save Position", thus saving any changes that have been made to the calculations on that position page.

Please note that if the headcount is being reduced and there are workforce assigned to that headcount. A message should appear alerting the super admin.

Headcount Summary



This tab allows you to view a summary of the current headcount. Drag different fields in to compare statistics in the interactive graph / dashboard.



History Tracking

- To view a history of changes made to the headcount, access via Headcount > Headcount History (TBD). Here you can view a list of the latest changes along with the relevant administrator.
- System should track any changes to the headcount as per the organization review cycle, as operational requirements are confirmed. This should be available in a dashboard format as well as a detailed change log
- Org Charts and reporting lines – TBD whether this is possible in this round of development



Reporting

- Reporting functionality should allow the user to filter on the following to run reports:
 - Functional Area
 - Workforce Type
 - Venue

Headcount Management report should pull all fields related to headcount.

History report should also be available