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Introduction

Capacity Planning Tool (CPT)

Capacity Planning Tool is a one solution Web-Based tool for all activities with respect to managing projects and resources. Using this we can keep track of capacity of an employee, ongoing projects, holidays and other non-working days for the organization as well as an individual. With the help of this tool, we can have all entry like Projects, Resources, Holidays, Markets, etc. directly from dedicated Master pages, furthermore from Project Allocation Page we can perform resource to project mapping within few seconds.

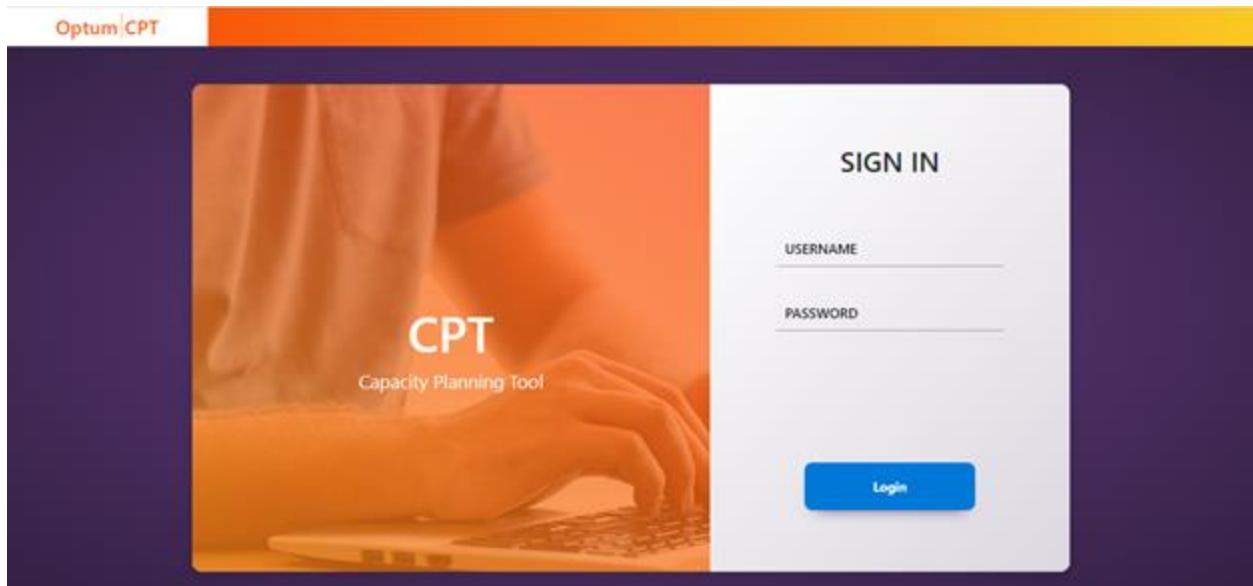
Agenda for this implementation is to bring multiple applications such as PPM Optics, TFS sprint, etc. on one platform for different markets. With the help of this tool, we can have all entry like Projects, Resources, Holidays, Markets, etc. directly from dedicated Master pages, furthermore from Project Allocation Page we can perform resource to project mapping within few seconds.

For better aid in utilization of the data capture from process, we have Power BI reports to represent different aspects of data analysis and visualization.

Pages and Capabilities

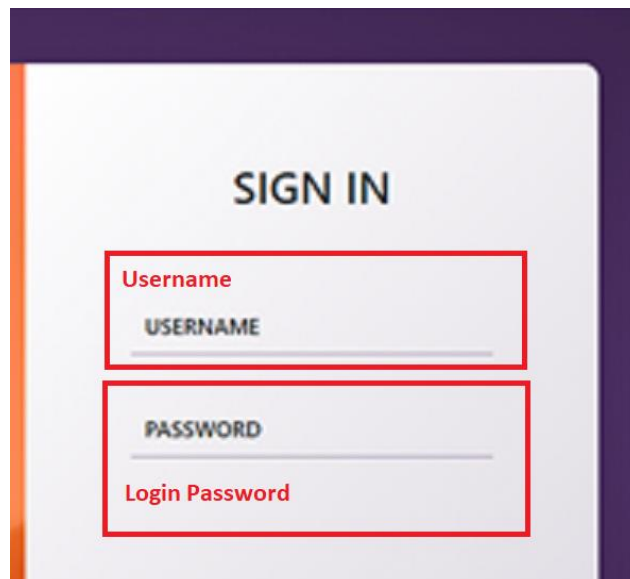
Login Screen

This is the first screen where a user is navigated, and this provides the interface through which a valid user can use.

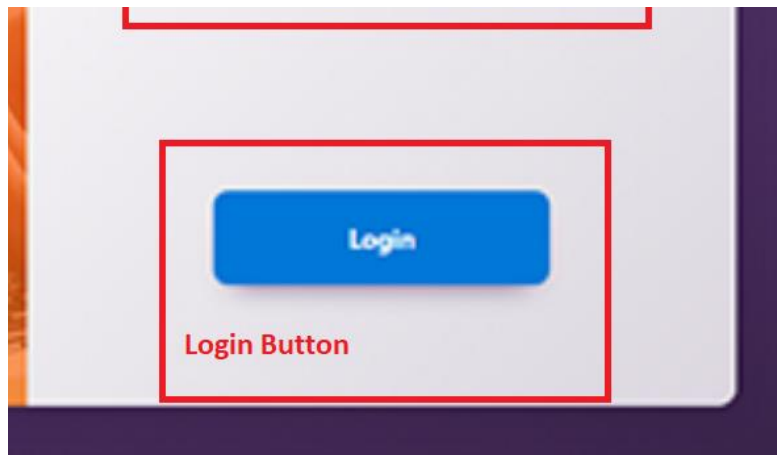


Screen provided for users to login using valid credentials. Using this screen, users with valid credentials can login. And use the app.

Step 1: User provides login credentials.



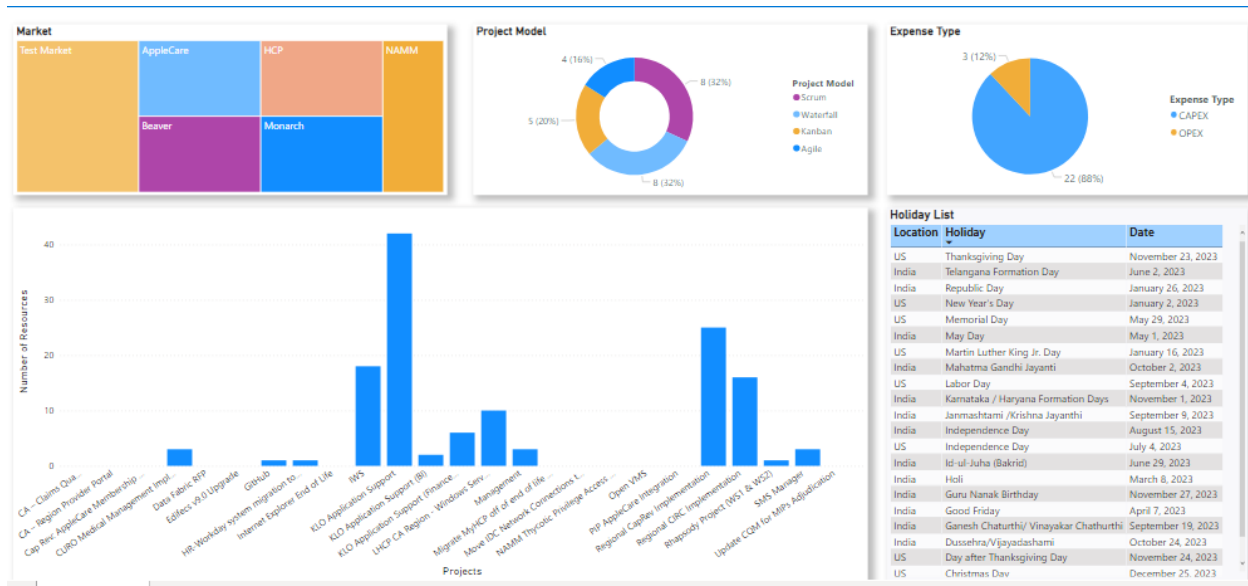
Step 2: User clicks the Login button



After clicking the Login button, both username as well as the password provided by the user is validated from the backend and if the credentials are valid, login is successful and user lands on the dashboard.

Dashboard

The dashboard shows Markets, Project models, Expense Type and Holiday data. We have visuals on Project models along with Expense Type for project in a selected market. It also shows projects along with the number of resources working in the project using bar chart. The holiday list shows holidays along with location for selected Market.



Dashboard with different graphs and charts related to ongoing projects and resources.

Master Entry

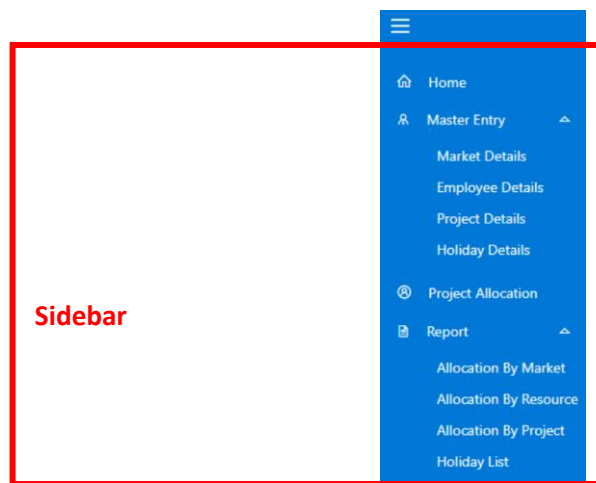
Master Entry provides an interface for the management of different resources and events i.e. any valid user can add, see and update. A valid user can manage Market Details, Employee Details, Project Details and Holiday Details.

Market Details

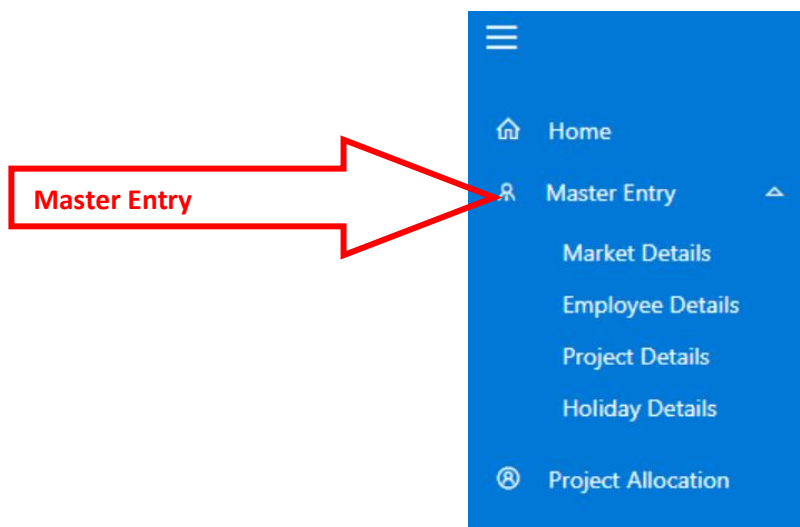
Market Details provides controls to manage different markets and their details such as their domain, status etc.

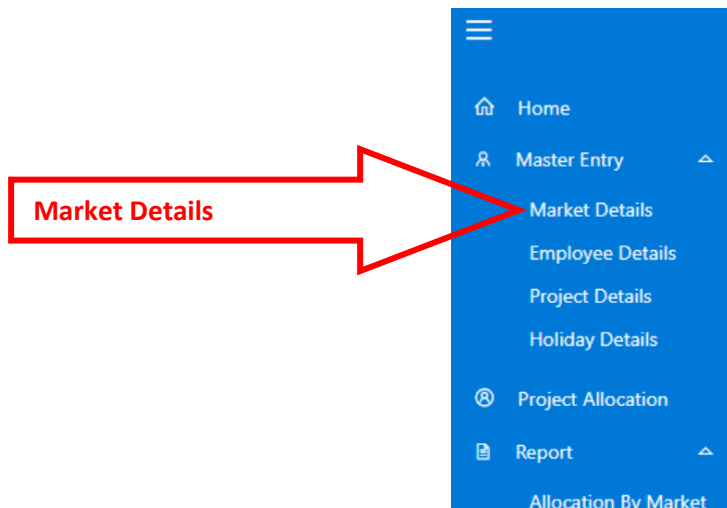
Accessing Market Details:

Step 1: In order to access Market Details user clicks on the sidebar on left.



Step 2: User selects Master Entry



Step 3: User selects Master Details**Step 4:** User gets navigated to following screen

Market Details

Master | Market

Add Market Button + Add Market

Searchbar Search X

Market Name	Market Domain	Status	Created Date	Created By
AppleCare	AppleCare	Active	2023-01-04	Admin
Beaver	Beaver	Active	2023-01-05	Admin
HCP	HCP	Active	2023-01-04	Admin
Monarch	Monarch	Active	2023-01-23	Admin
NAMM	NAMM	Active	2023-01-09	Admin

Market Details

Rows per page: 10 1-5 of 5 |< < > >|

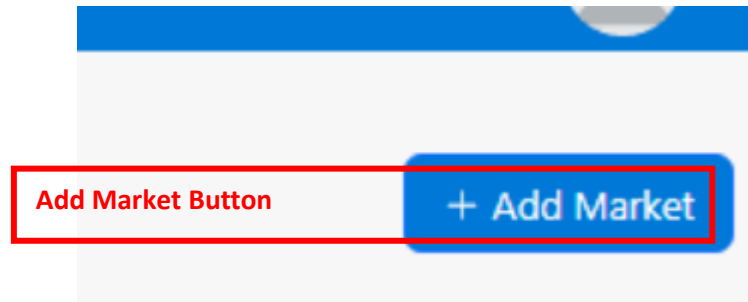
Capabilities available within the Market Details Tab

User can access details related to Markets associated with us. Accessible details are Market Name, Market Domain, Status (Active or Inactive), date of creation and who has created a Market.

User can also add Markets that are associating.

Steps to add a market are as follows

Step 1: On the Market Details tab user can find a button “+ Add Market” available on top right corner below the Username and profile picture. User clicks on the button then a form with required fields opens-up.



Step 2: User fills in the required details and submits the form.

A screenshot of the "Add New Market" form in the Capacity Planning Tool. The form is titled "Add New Market" and has a close button (X) in the top right corner. It contains two input fields: "Market Name" and "Market Domain". Below these fields, the text "Required Fields for Market" is written in red. A blue "Submit" button is located at the bottom right of the form.

After submission user gets an alert and returns to the Market Details screen where he can see the newly added market.

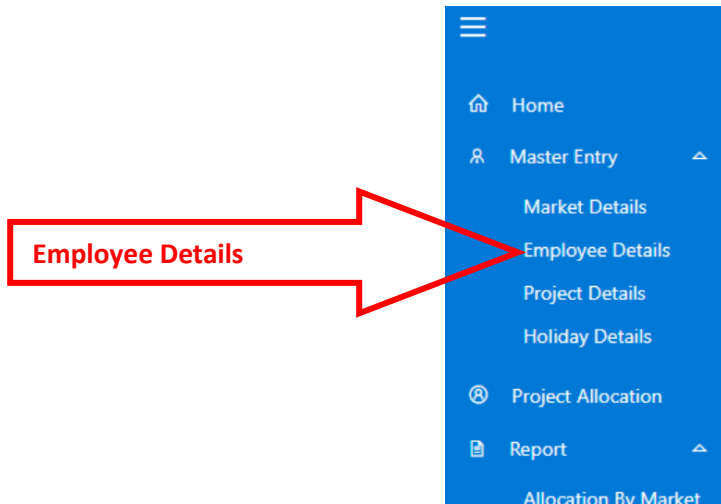
A screenshot of the "Market Details" screen in the Capacity Planning Tool. At the top, there is a blue header bar with the text "Capacity Planning Tool". Below the header, there is a red rectangular box containing a green checkmark icon and the text "Market Added Successfully". Below this, the text "Alert for Successful Market Addition" is written in red. To the right of the alert, there is a blue button with a white plus sign and the text "+ Add Market". Below the alert, there is a table with the following columns: "Market Name", "Market Domain", "Status", "Created Date", and "Created By". The table contains several rows of data, including "AppleCare", "Beaver", "HCP", "Monarch", "NAMM", and "Test Market". The "Test Market" row is highlighted in red, and the text "Newly Added Market" is written in red next to it.

Market Name	Market Domain	Status	Created Date	Created By
AppleCare	AppleCare	Active	2023-01-04	Admin
Beaver	Beaver	Active	2023-01-05	Admin
HCP	HCP	Active	2023-01-04	Admin
Monarch	Monarch	Active	2023-01-23	Admin
NAMM	NAMM	Active	2023-01-09	Admin
Test Market	CA	Active	2023-01-30	Admin
Test Market	CA	Active	2023-01-30	Admin

Employee Details

Employee Details provides the capability to manage the employees and the projects they are working on or have worked on in the past along with the number of hours on respective projects and some other details.

Accessing Employee Details



In order to access Employee Details user selects Employee Details tab under Master Entry of the sidebar, then it navigates to the following screen.

Employee Details

Master | Employee Details

+ Add Employee

Role Resource Type Market Status
Select Select Select Select Clear Filters

Search X

Resource	Role	Email Address	Manager	Resource Ty...	Market	Location	Sub Location	Status	Created Date	Created By
Ajay Singh	Sr. Developer	user@optum.com	Puneet Ratti	OGS	HCP	India	Noida	Active	2023-01-24	Admin
Alexander Rozenb...	Developer	user@optum.com	Vipul Suri	GTM	HCP	US	California	Active	2023-01-25	Admin
Anand Pachipala	Developer	user@optum.com	Ashish Khare	OGS	HCP	India	Hyderabad	Active	2023-01-24	Admin
Anant Toshniwal	Developer	user@optum.com	Ashish Khare	OGS	HCP	India	Noida	Active	2023-01-24	Admin
Andrey Zagaynov	Developer	user@optum.com	Vipul Suri	GTM	HCP	US	California	Active	2023-01-24	Admin

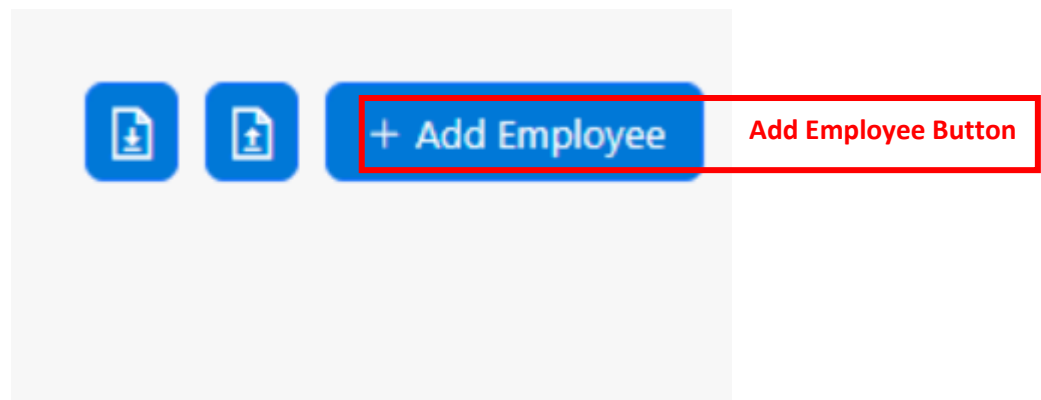
Employee Details

Capabilities accessible from the Employee Details screen.

1. User can see details related to employees
2. User can also download the list of employees with afore-mentioned fields using the download button available beside the upload button.
3. User can see a list of employees and the list can be filtered as well on the basis of different filters namely
 - a. Market
 - b. Role
 - c. Resource Type
 - d. Status
4. User can also search an employee.
5. Adding Employees details in bulk
6. Adding Employees details individually

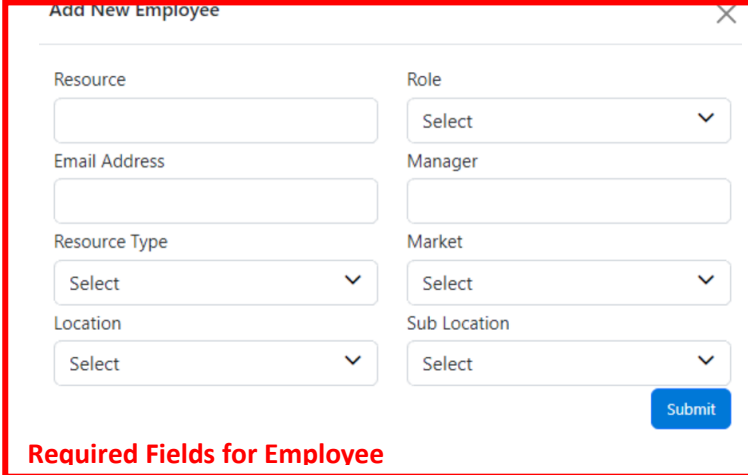
Steps for Adding Individual Employees:

Step 1: User clicks on the “+ Add Employee” button available on the top right corner then a form with required details opens-up.



Step 2: After filling in all the required fields user can submit it.

User Manual



The screenshot shows a web form titled "Add New Employee" with a close button (X) in the top right corner. The form contains the following fields:

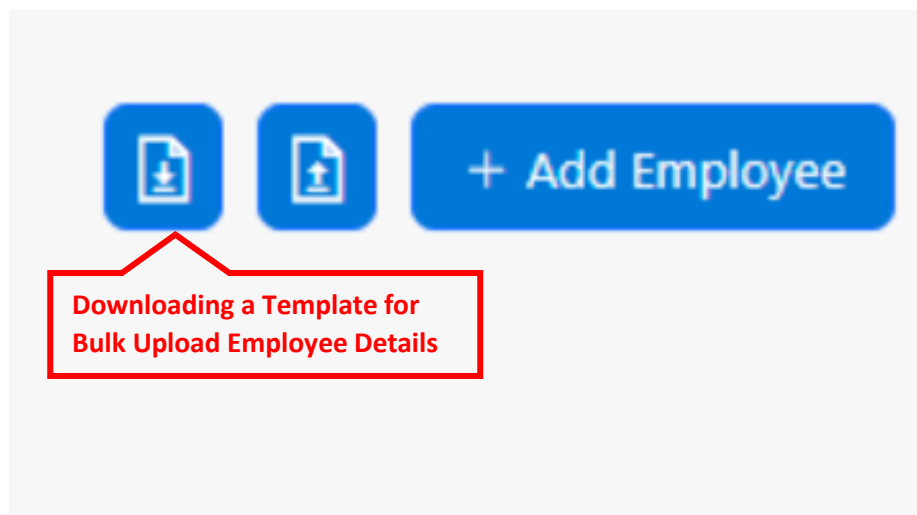
- Resource: Text input field
- Role: Dropdown menu with "Select" and a downward arrow
- Email Address: Text input field
- Manager: Text input field
- Resource Type: Dropdown menu with "Select" and a downward arrow
- Market: Dropdown menu with "Select" and a downward arrow
- Location: Dropdown menu with "Select" and a downward arrow
- Sub Location: Dropdown menu with "Select" and a downward arrow

A blue "Submit" button is located at the bottom right of the form. A red rectangular border highlights the entire form area. Below the form, the text "Required Fields for Employee" is written in red.

After submission with all the valid details an employee gets added and the user gets an alert of successful addition, and the newly added employee can be found on the employee details screen.

Downloading A Template of Employee Details

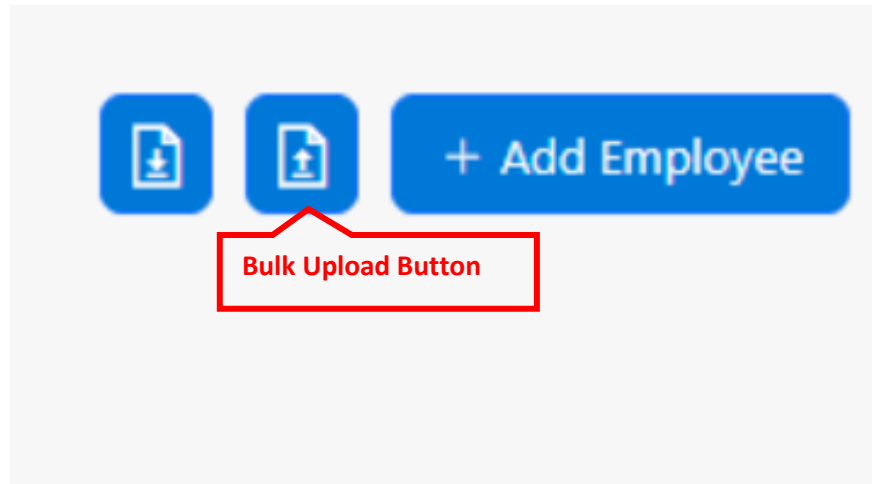
User can simply download a template with all the required details of all the employees by clicking the highlighted button.



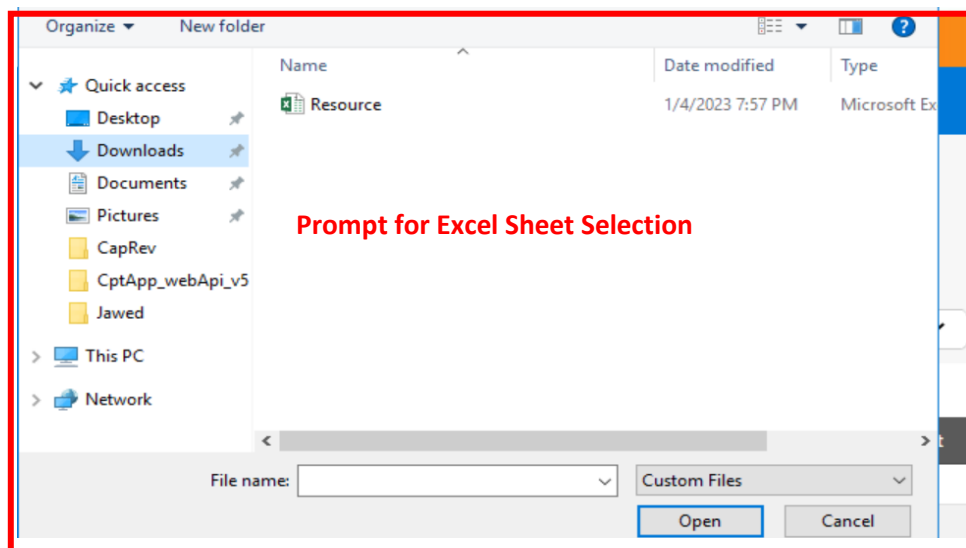
Steps for adding Employees' details in bulk:

Step 1: User selects the second button available on top right corner of the Employee Details screen then a pop up for selecting an excel sheet with all the required fields.

User Manual



Step 2: After selecting an excel sheet with all the required fields for adding individual employee details. After selecting the file user submits.



After successful upload, all the valid details get updated and user gets an alert. All newly added employees can be seen on the employee details screen.

User Manual

Employee Details

Master | Employee Details



+ Add Employee

Role Resource Type Market Status Clear Filters

 X

Resource	Role	Email Addr...	Manager	Resource Tv...	Market	Location	Sub Location	Status	Created Date	Created By
A	Developer	a@optum.com	IM...					Active	2023-01-30	Admin
Ajay Singh	Sr. Developer	user@optum.com	Puneet Ratti	OGS	HCP	India	Noida	Active	2023-01-24	Admin
Alexander Rozenb...	Developer	user@optum.com	Vipul Suri	GTM	HCP	US	California	Active	2023-01-25	Admin
Anand Pachipala	Developer	user@optum.com	Ashish Khare	OGS	HCP	India	Hyderabad	Active	2023-01-24	Admin

Newly Added Employees from Bulk Upload

Step 3: Edit the record.

Update Employee



Resource

Ajay Singh

Email Address

user@optum.com

Resource Type

OGS

Location

India

Status

Active

Role

Sr. Developer

Manager

Puneet Ratti

Market

HCP

Sub Location

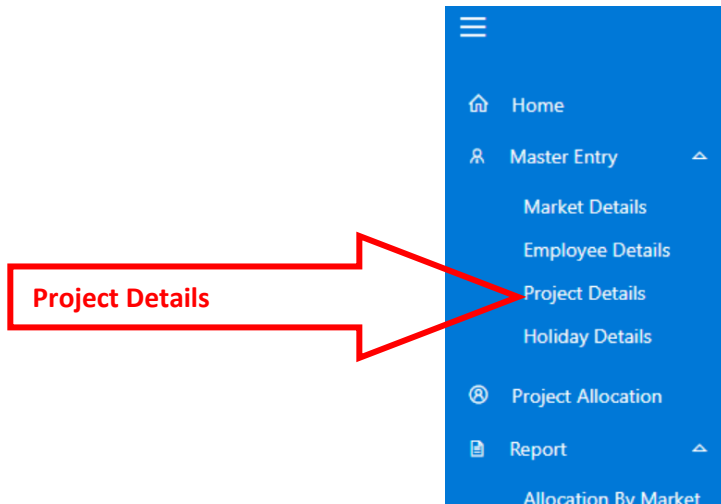
Noida

Submit

Project Details

This screen provides project management capability. From this screen user can see projects, their market, manager model and some other details. And user can also add, search and filter projects

Accessing the Project Details Screen



In order to access Project Details user selects Project Details tab under Master Entry of the sidebar, then it navigates to the following screen.

Project Details

Master | Project Info

+ Add Project

Project Model: Select | Market: Select | Expense Type: Select | Status: Select | Clear Filters

Search

Project Code	Project Name	Project Model	Market	Program Mana...	Expense Type	Status	Created Date	Created By
PRJ0010593	Internet Explorer End o...	Kanban	Beaver	Test Manager	CAPEX	Active	2023-01-25	Admin
22222	Open VMS	Kanban	HCP	Shriyans Sharma	CAPEX	Active	2023-01-25	Admin
33333	GitHub	Agile	Monarch		CAPEX	Active	2023-01-25	Admin
44444	Management	Waterfall	HCP	Ashish Khare	CAPEX	Active	2023-01-25	Admin
52514	PIP AppleCare Integrati...	Agile	HCP	Chul Cho	CAPEX	Active	2023-01-25	Admin

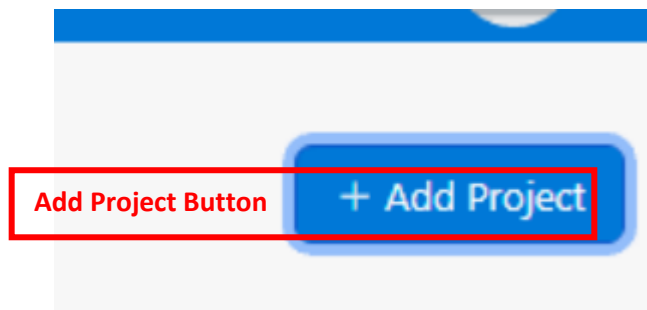
Project Details

Capabilities accessible from the Project Details screen.

1. User can see details related to projects
2. User can see a list of projects and the list can be filtered as well on the basis of different filters namely
 - a. Project Model
 - b. Market
 - c. Expense Type
 - d. Status
3. User can also search a project.
4. Adding Project Detail
5. Editing Project Detail

Steps to add a Project

Step 1: User clicks on the “+ Add Project” button available on the top right corner of the Project Details screen, then following form opens-up with required fields.



Step 2: User fills in the required field of the form and submits it.

A screenshot of a form titled 'Add New Project' with a close button (X) in the top right corner. The form contains six input fields arranged in two columns. The left column has 'Project Code', 'Project Model' (a dropdown menu with 'Select' and a downward arrow), and 'Expense Type' (a dropdown menu with 'Select' and a downward arrow). The right column has 'Project Name', 'Market' (a dropdown menu with 'Select' and a downward arrow), and 'Program Manager'. At the bottom of the form, there is a red label 'Required Project Details' and a blue 'Submit' button.

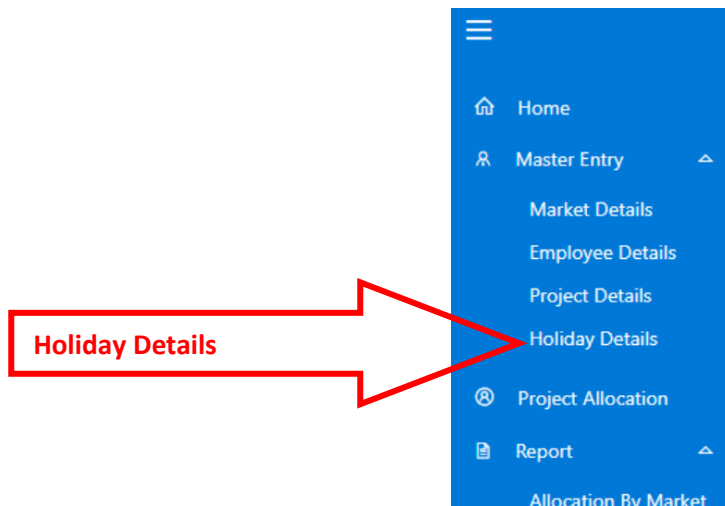
After successful addition of the project user gets an alert and the newly added project can be seen on the project details screen.

Holiday Details

This screen provides capability to manage holidays, it provides details like market, location and other details applicable for a particular holiday.

Accessing the Holiday Details screen:

In order to access the Holiday Details Screen user selects Holiday Details from the Master Entry dropdown of the left sidebar and it navigates to following screen.



Holiday Details

Master | Holiday Details

+ Add Holiday

Market Location Sub Location Status
Select Select Select Select Clear Filters

Search							
Occasion	Holiday Date	Market	Location	Sub Location	Status	Created Date	Created By
Republic Day	2023-01-26	AppleCare	India	Noida	Active	2023-01-05	Admin
Republic Day	2023-01-26	Beaver	India	Gurgaon	Active	2023-01-05	Admin
Independence Day	2023-07-04	AppleCare	US	California	Active	2023-01-05	Admin
Independence Day	2023-08-15	HCP	India	Hyderabad	Active	2023-01-05	Admin

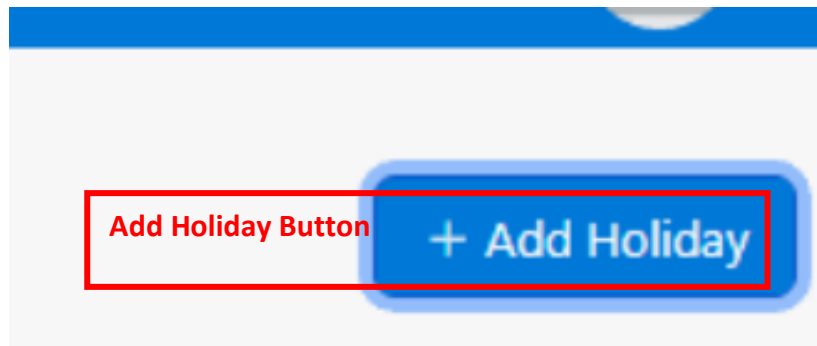
Holiday Details

Capabilities available on this screen:

1. User can see details related to Holidays
2. User can see a list of Holidays and the list can be filtered as well on the basis of different filters namely
 - a. Market
 - b. Location
 - c. Sub Location
 - d. Status
3. User can also search a holiday.
4. Adding Holiday detail

Steps to add a Holiday

Step 1: User clicks on the “+ Add Holiday” button available on the top right corner of the Holiday Details screen, then following form opens-up with required fields.



Step 2: User fills in the required field of the form and submits it.

A screenshot of a form titled 'Add New Holiday' with a close button (X) in the top right corner. The form contains the following fields:

- Occasion: A text input field.
- Holiday Date: A date input field showing '27/ 1/2023' with a clear (X) and calendar icon.
- Market: A dropdown menu with 'Select' and a downward arrow.
- Location: A dropdown menu with 'Select' and a downward arrow.
- Sub Location: A dropdown menu with 'Select' and a downward arrow.
- Submit: A blue button with the text 'Submit'.

A red rectangular box is drawn around the entire form, and a red label 'Holiday Required Fields' is placed at the bottom left of the box.

User Manual

After successful addition user gets alert and the holiday can be seen on the holiday details screen.

Project Allocation

Steps for allocating a project:

Project Allocation + Allocate New Project

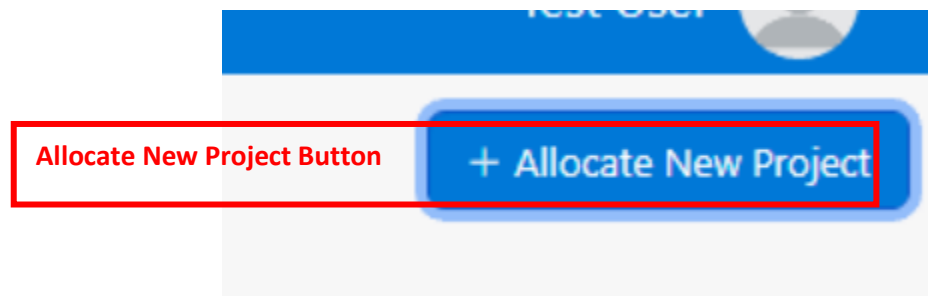
Resource Type Role Location Resource Market Project Market Expense Type Clear Filters

X

Resource	Resource Type	Role	Supervisor	Location	Resource Ma...	Project	Resource Ty...	Project Market	Project Code	Expense Type	Start Date	End
Ajay Singh	OGS	Sr. Developer	Puneet Ratti	India	HCP	KLO Application Su...	Sr. Developer	HCP	PRJ0010012	OPEX	2023-01-01	202
Ajay Singh	OGS	Sr. Developer	Puneet Ratti	India	HCP	SMS Manager	Sr. Developer	HCP	PRJ0011644	CAPEX	2023-01-01	202
Alexander Rozenba...	GTM	Developer	Vipul Suri	US	HCP	KLO Application Su...	Developer	HCP	PRJ0010012	OPEX	2022-12-01	202
Alexander Rozenba...	GTM	Developer	Vipul Suri	US	HCP	KLO Application Su...	Developer	HCP	PRJ0010012	OPEX	2023-01-01	202
Anand Pachipala	OGS	Developer	Ashish Khare	India	HCP	Regional CapRev L...	Developer	HCP	PRJ0010580	CAPEX	2023-01-01	202
Anant Toshniwal	OGS	Developer	Ashish Khare	India	HCP	KLO Application Su...	Developer	HCP	PRJ0010012	OPEX	2023-01-01	202
Andrey Zagaynov	GTM	Developer	Vipul Suri	US	HCP	KLO Application Su...	Developer	HCP	PRJ0010012	CAPEX	2023-01-01	202
Andrey Zagaynov	GTM	Developer	Vipul Suri	US	HCP	KLO Application Su...	Developer	HCP	PRJ0010012	CAPEX	2022-12-01	202
Anindita Talukdar	OGS	Developer	Shriyans Sharma	India	HCP	KLO Application Su...	Developer	HCP	PRJ0010012	OPEX	2022-12-01	202
Anindita Talukdar	OGS	Developer	Shriyans Sharma	India	HCP	Regional CIRC Impl...	Developer	HCP	PRJ0011513	CAPEX	2022-12-01	202

Rows per page: 10 1-10 of 209

Step 1: User clicks on the “+ Allocate New Project” button available on the top right corner of the Project Allocation screen, then following form opens-up with required fields.



Step 2: User fills in the required field of the form and submits it.

Allocate New Project

Resource

Select

▼

Resource Type

Role

Supervisor

Location

Resource Market

Project

Select

▼

Resource Type 1

Select

▼

Project Market

PPSID

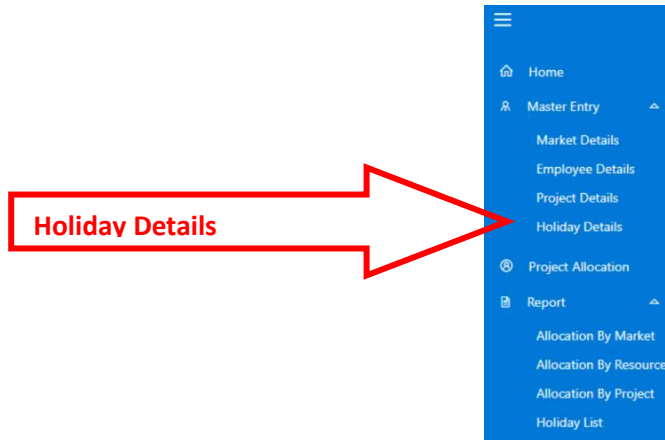
Expense Type

Allocation Start Date

Reports

This collection of dropdowns provides capability to generate reports on the basis of different set of data available on the database.

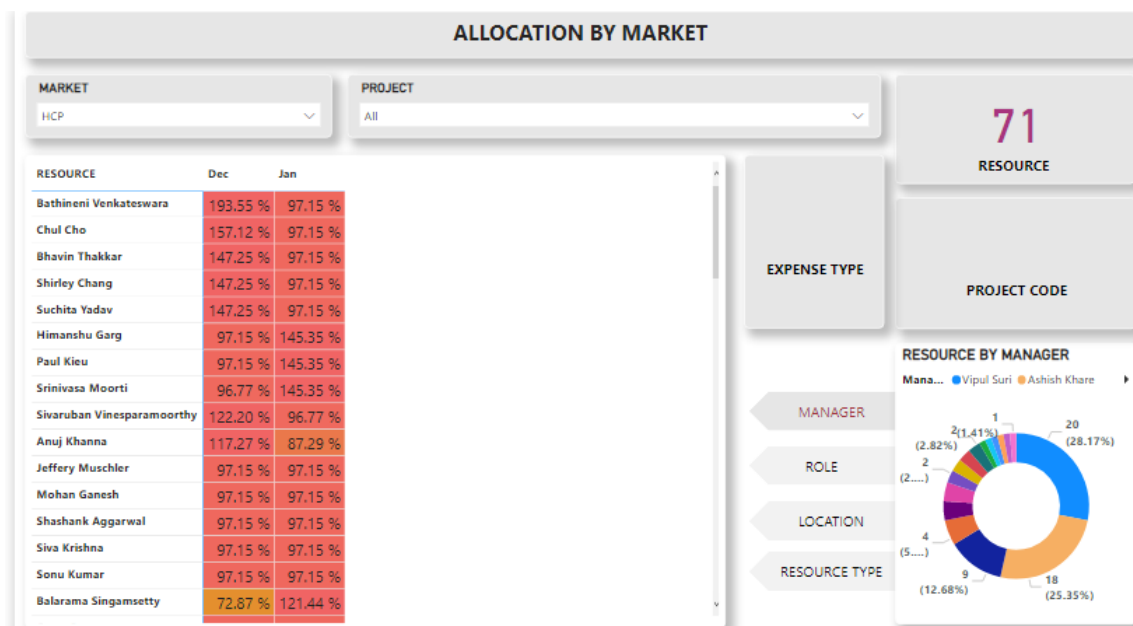
Accessing Reports Screen



In order to access this set of screens user has to select a dropdown from the Report tab of the left sidebar and it navigates the user to screen with respective report.

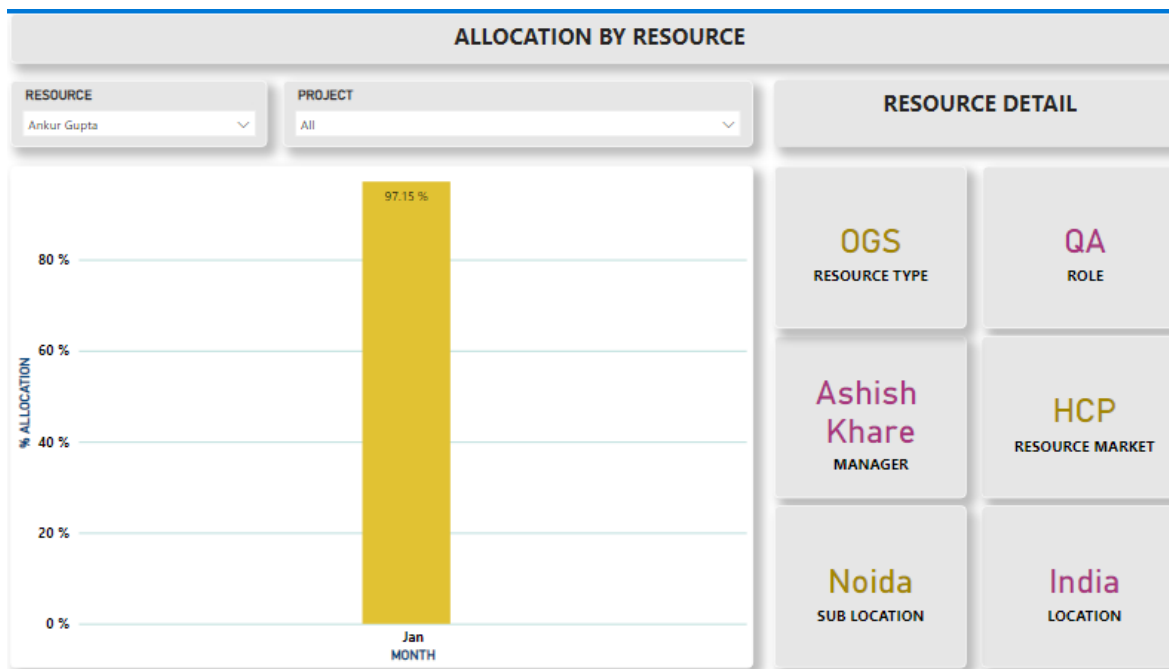
Allocation By Market

This Report gives details related to Market like Number of projects under each market and Resources under each project and shows Allocation Percentage for each resource under particular project in each market. Initially it will show Allocation Percentage for all Resources in a particular market unless a particular project selected.



Allocation By Resource

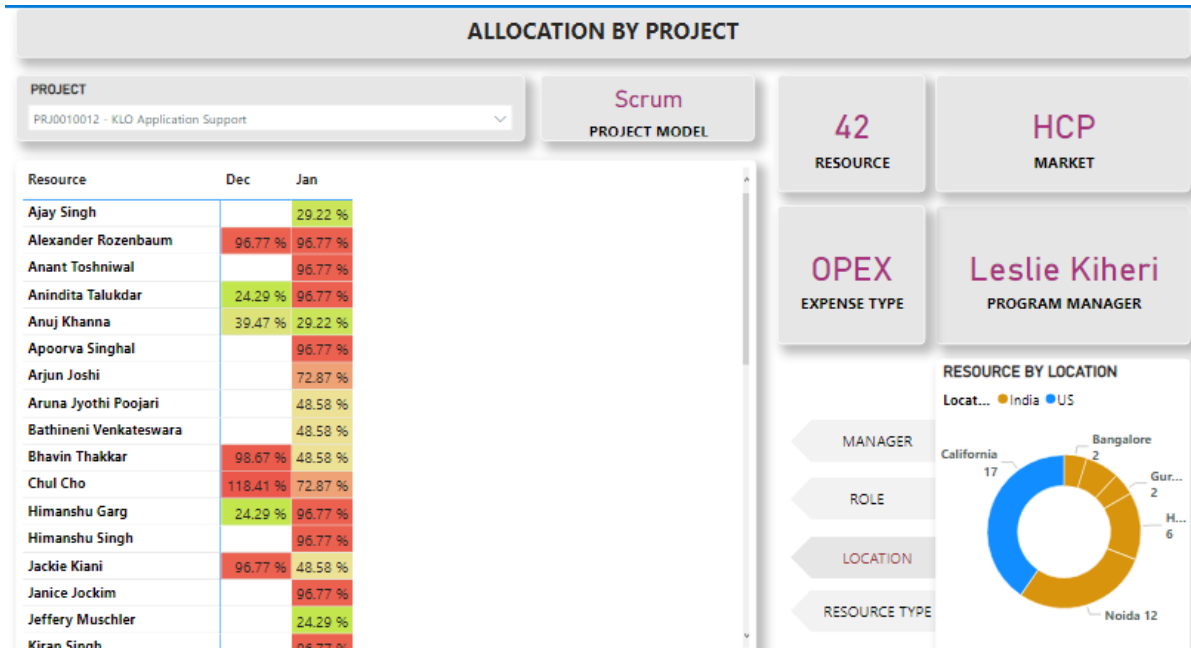
This Report gives details related to Projects, Resources included in particular project and its Allocation Percentage within each project. It gives other details such as Project model, Expense Type, Market associated with it. One can also check the Managers, Resource Type, Roles and Location of various resource. The Heatmap is shown to visualize the Allocation percentage with respect to months and the allocation percentage is shown with different colors to show the occupancy of the resource. The occupancy of the Resource is represented with combination of Green, Yellow and Red color.



Allocation By Project

This Report gives details related to Market like Number of projects under each market and Resources under each project and shows Allocation Percentage for each resource under particular project in each market. Initially it will show Allocation Percentage for all Resources in a particular market unless a particular project selected. The Heatmap is shown to show the data related to that. The occupancy of the Resource is represented with combination of Green, Yellow and Red color.

User Manual

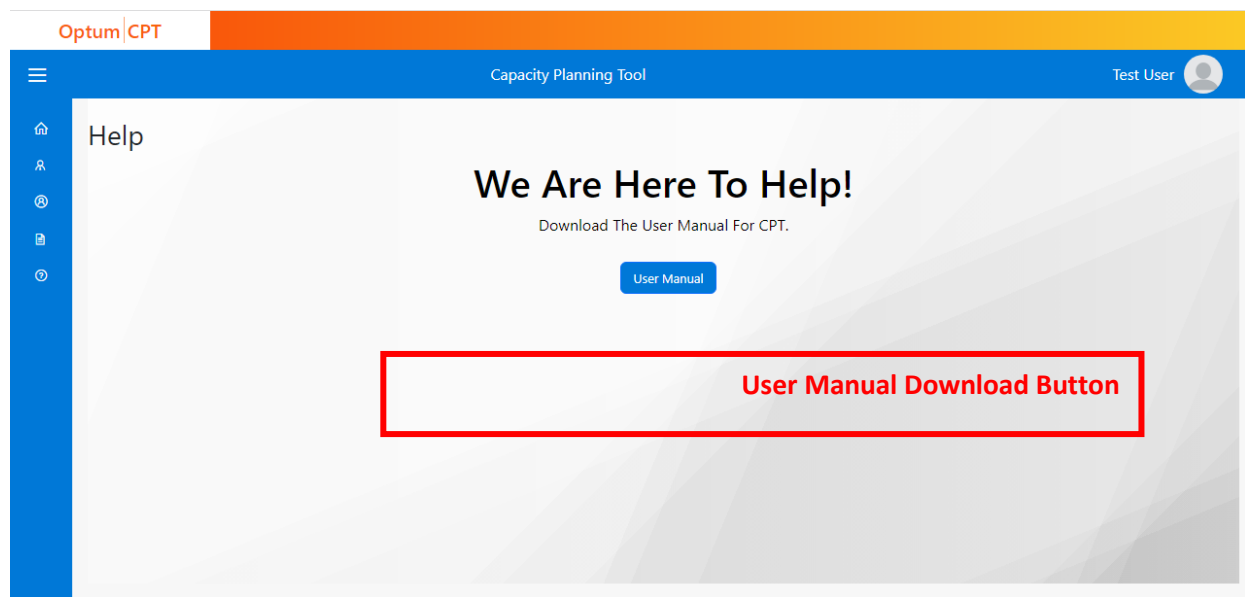


Holiday List

This Report gives details related to holiday for current year for each market and for each location and sub location. The three dropdowns are provided on the left pane to filter the holiday list according to markets, countries and State and on the right pane the holiday list is displayed.

Help

Users can User Manual by click the highlighted button



Logout

User can logout after clicking the Logout button which is accessible after clicking the user icon on the top right corner.

