Contents

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.

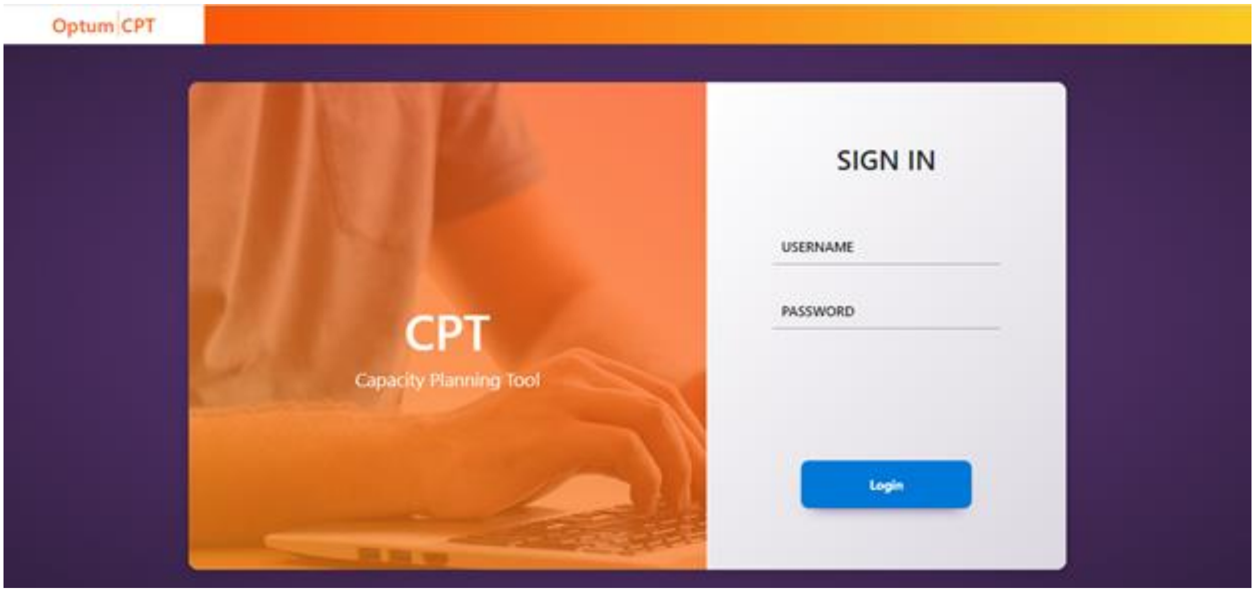
Agenda for this implementation is to bring multiple applications such as PPM Optics, TFS sprint, etc. on one platform for different markets. With the help of this tool, we can have all entry like Projects, Resources, Holidays, Markets, etc. directly from dedicated Master pages, furthermore from Project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

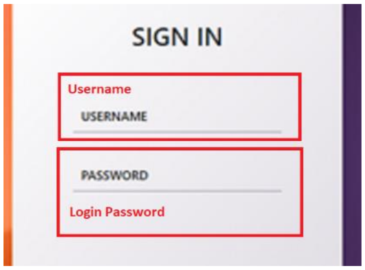
Login Screen

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

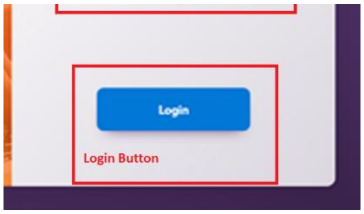


Screen provided for users to login using valid credentials. Using this screen, users with valid credentials can login. And use the app.

Step 1: User provides login credentials.



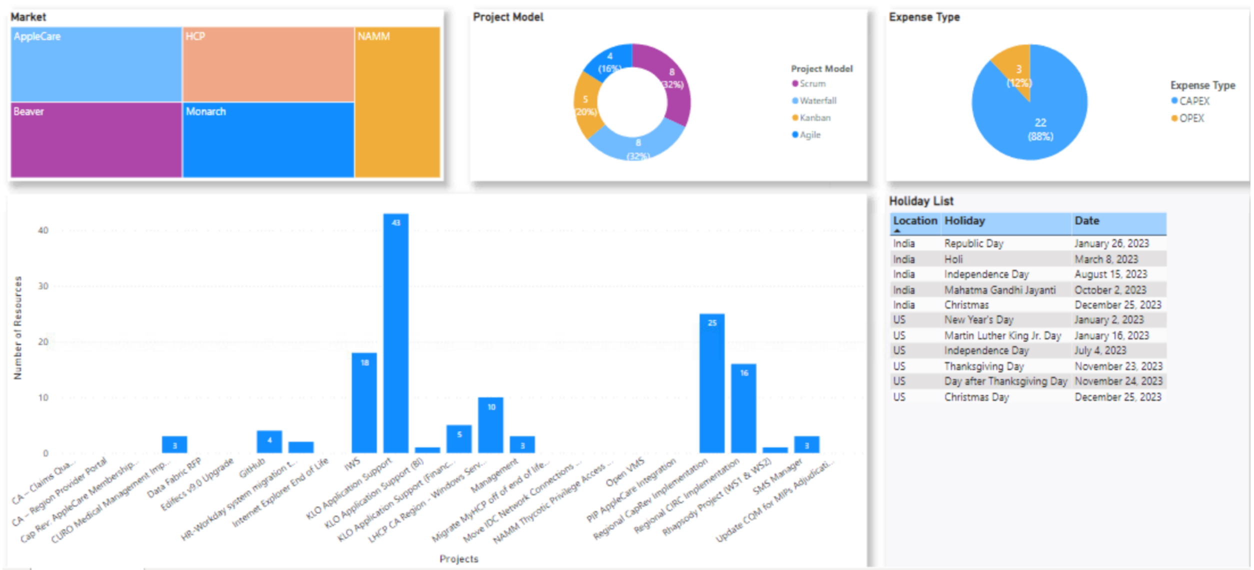
Step 2: User clicks the Login button



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

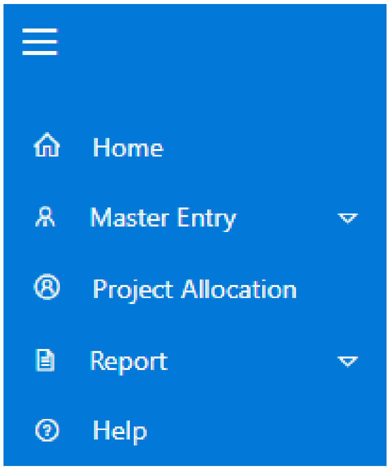
The dashboard shows Markets, Project models, Expense Type and Holiday data. We have visuals on Project models along with Expense Type for project in a selected market. It also shows projects along with the number of resources working in the project using bar chart. The holiday list shows holidays along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



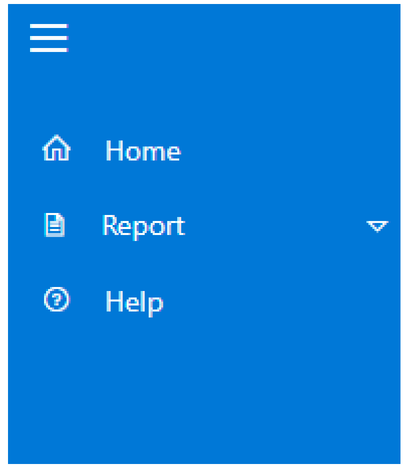
Dashboard with different graphs and charts related to ongoing projects and resources.

Role Based Access

Admin



General User

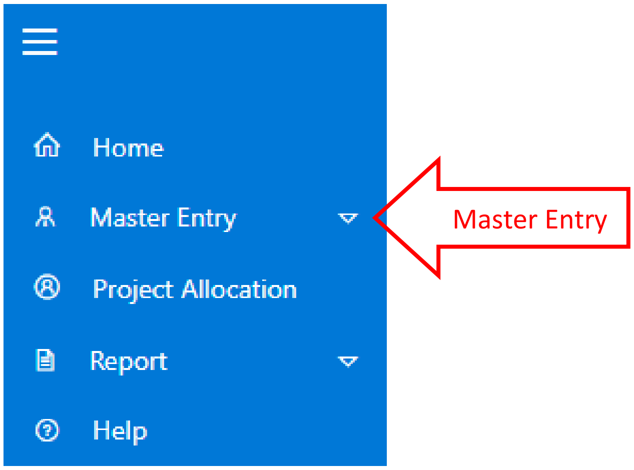


We have two different kinds of roles namely admin and user, depending upon the role of the user we have different capabilities accessible to the users and it can be seen in the attached images above.

For a normal user we have limited the access to reports only however for admins we have the access to master entry as well which leads to a host of other market management capacities.

Master Entry

Master Entry provides an interface for the management of different resources and events i.e. any valid admin can add, see and update. A valid admin can manage Market Details, Employee Details, Project Details and Holiday Details. And it can be accessed from the sidebar on the left.

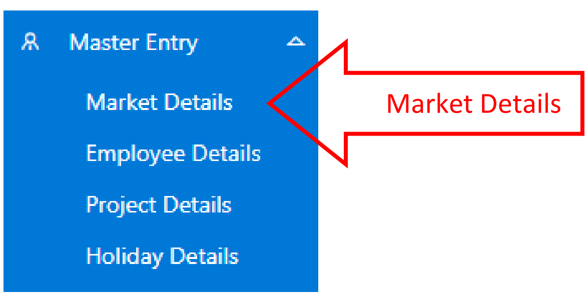


Market Details

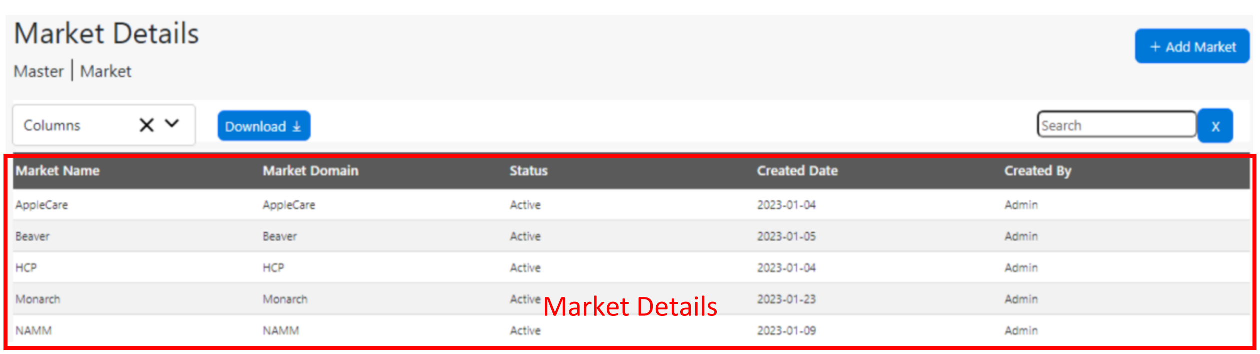
Market Details provides controls to manage different markets and their details such as their domain, status etc.

Accessing Market Details:

Step 1: In order to access Market Details admin clicks on the Market Details dropdown under Master Entry.



Step 2: Admin gets navigated to following screen



We have a search functionality using that we can search on the basis of different values.

Capabilities available within the Market Details Tab

Admin 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.

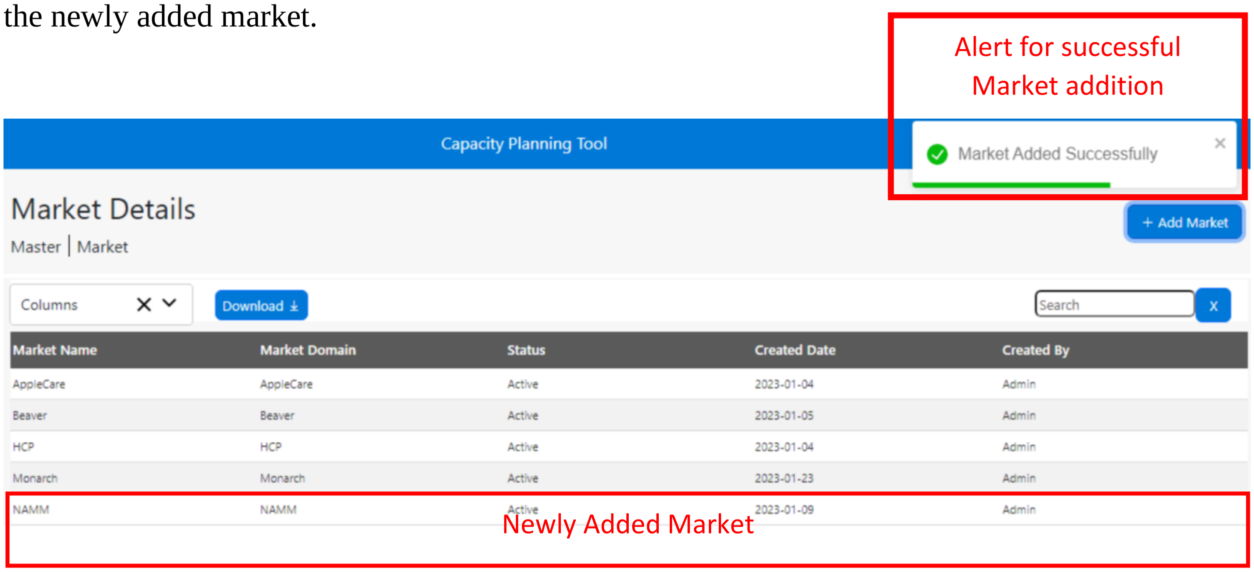
Admin can search, using which admins can get details for a market. Apart from search admin can also add Markets that are associating.

Steps to add a market

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

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

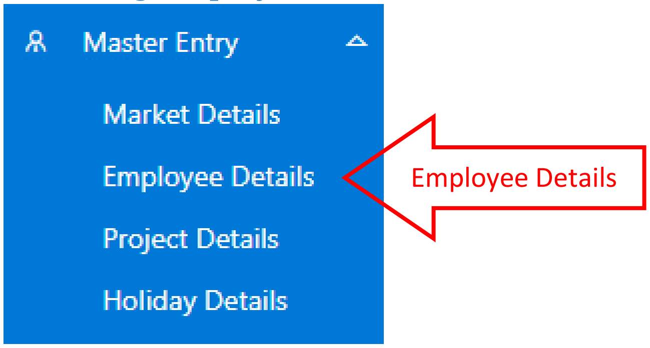
After submission admin gets an alert and returns to the Market Details screen where he can see the newly added market.



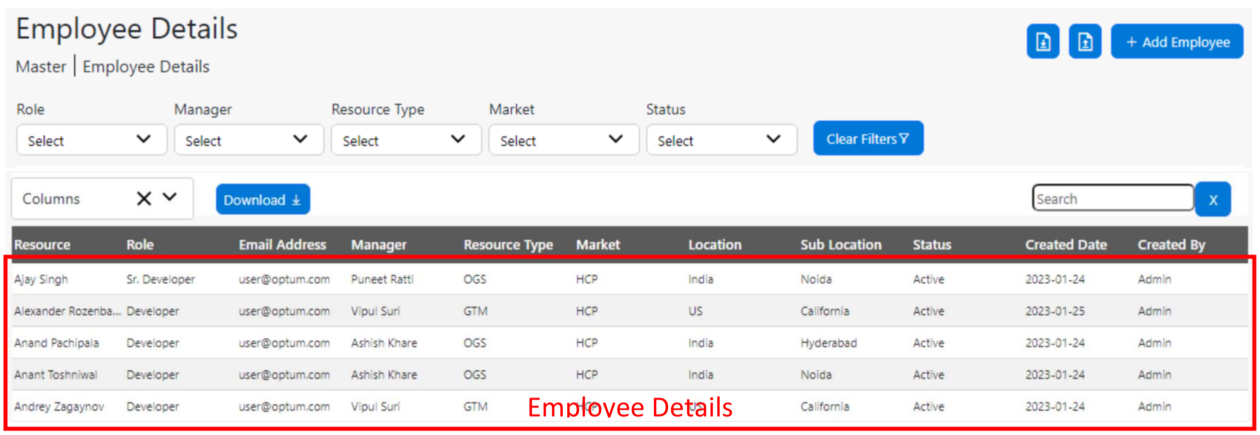
Employee Details

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

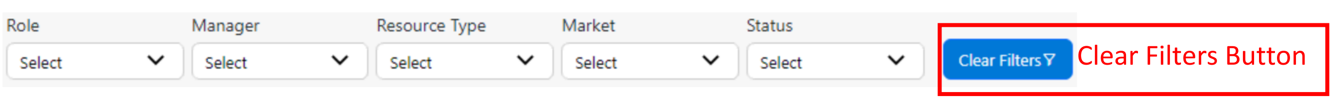


In order to access Employee Details admin selects Employee Details tab under Master Entry of the sidebar, then it navigates to the following screen.



Resource	Role	Email Address	Manager	Resource Type	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 Rozenba...	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	[illegible]	[illegible]	California	Active	2023-01-24	Admin

Here we also have search functionality using it we can search different fields and on the basis of that we get all the records. Apart from search we also have filters and clear filter functionality. We can filter employees on the basis of role, manager, resource type, market and their status of activeness.



Using the clear filters button we can cancel all filters and get the unfiltered records on the screen.

Download Selected Columns

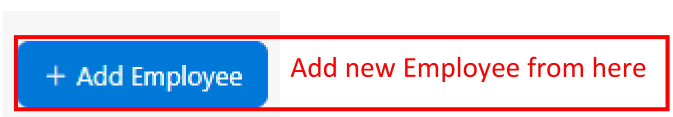
On all the master pages, we have a column dropdown on this screen. It has some alreay selected selecction fields for the columns that are visible on the screen and some fields are unselected but we can filter the columns that we want to download. But, if we don't filter the columns then already selected columns would be exprted.

Capabilities accessible from the Employee Details screen.

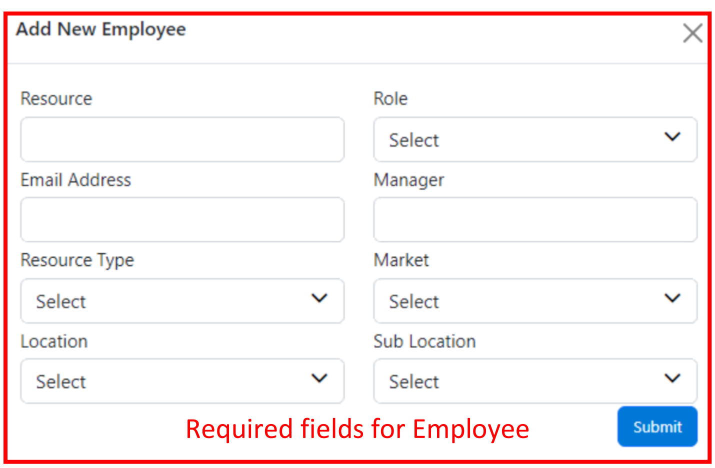
1. Admin can see details related to employees
2. Admin can also download the list of employees with afore-mentioned fields using the Export button beneath the filter.
3. Admin can see a list of employees and the list can be filtered as well onSh1hi the basis of different filters namely
    a. Role
    b. Manager
    c. Resource Type
    d. Market
    e. Status
4. Admin can also search an employee.
5. Downloading the Bulk upload template
6. Adding Employees details in bulk
7. Adding Employees details individually
8. Edit or Update Employee Details

Steps for Adding Individual Employees:

Step 1: Admin 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 admin can submit it.



After submission with all the valid details an employee gets added and the admin 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

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

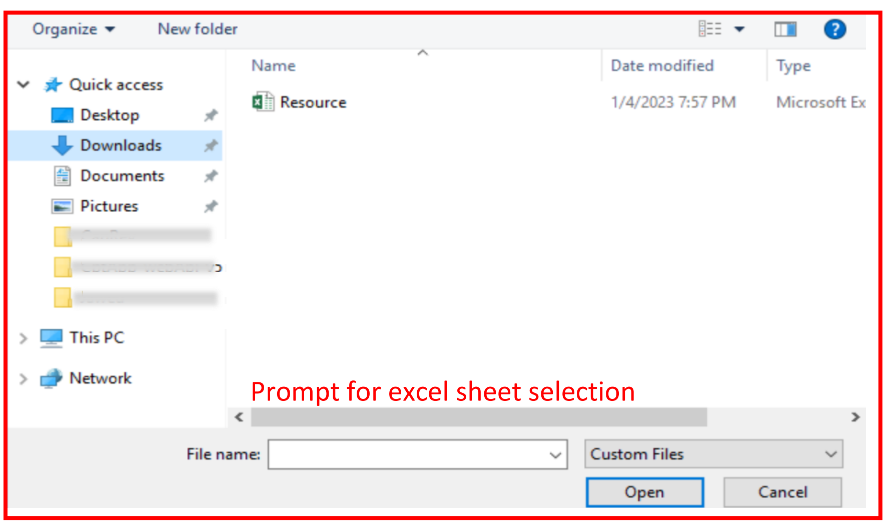
Export Employee Details

For all the master pages, admins can export employee details filtered or total clicking the Download button available below the filter, and it would prompt admin to select the download file type which could be either a pdf or an excel file. If we select any filters before clicking the export button, then the exported file would contain all the filtered details but if we don't select any filters then all the details would be exported.

Steps for adding Employees' details in bulk:

Step 1: Admin 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.

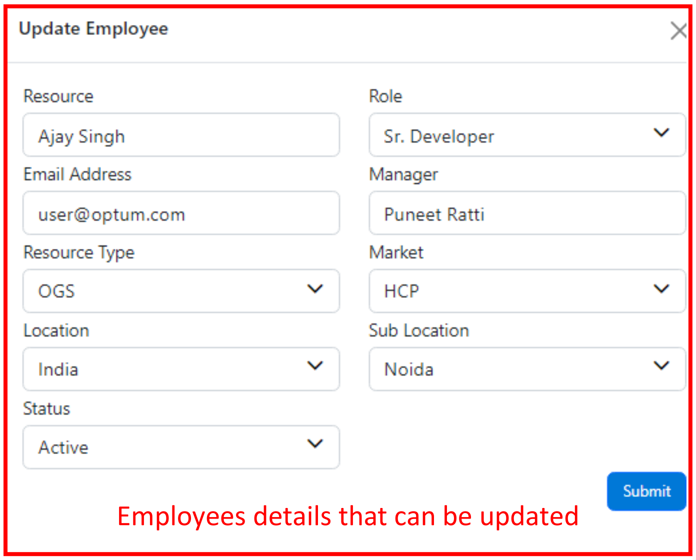
Step 2: After selecting an excel sheet with all the required fields for adding individual employee details. After selecting the file admin submits.



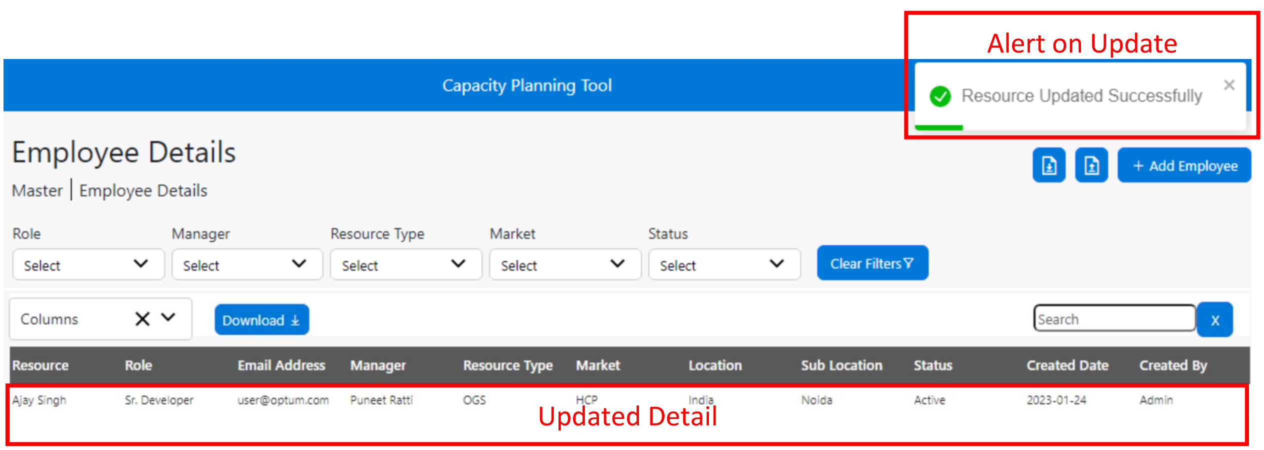
After successful upload, all the valid details get updated and admin gets an alert. All newly added employees can be seen on the employee details screen.

Steps for Updating an Employee Details

Step 1: Admin double clicks on an employee detail row then a prepopulated form opens from the right side of the screen. If an admin does not want to update, he can click outside the form or can click on the “x” button available on the top right corner of the form.



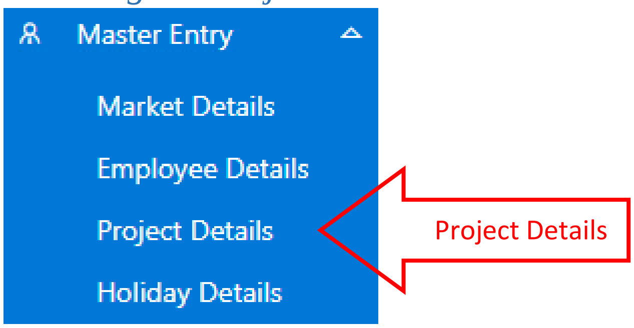
Step 2: Admin can update the details with valid set of information and can submit it. All the updated information can be seen on the employee details screen itself.



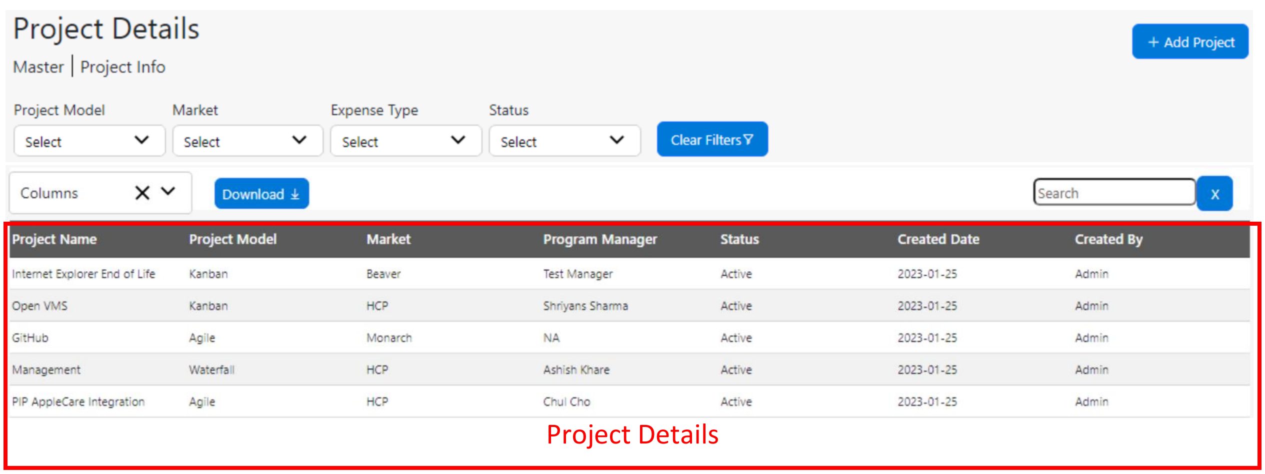
Project Details

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

Accessing the Project Details Screen

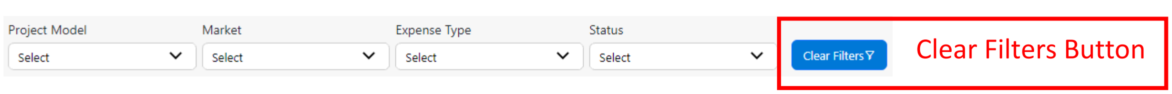


In order to access Project Details admin selects Project Details dropdown under Master Entry of the sidebar, then it navigates to the following screen.



Project Name	Project Model	Market	Program Manager	Status	Created Date	Created By
Internet Explorer End of Life	Kanban	Beaver	Test Manager	Active	2023-01-25	Admin
Open VMS	Kanban	HCP	Shriyans Sharma	Active	2023-01-25	Admin
GitHub	Agile	Monarch	NA	Active	2023-01-25	Admin
Management	Waterfall	HCP	Ashish Khare	Active	2023-01-25	Admin
PIP AppleCare Integration	Agile	HCP	Chul Cho	Active	2023-01-25	Admin

By leveraging the search functionality we can search on the basis of different fields. Apart from search we can also filter projects on the basis of project model, market, expense type and their status.



And once we are done with filters we can cancel all filters using the clear filter button.

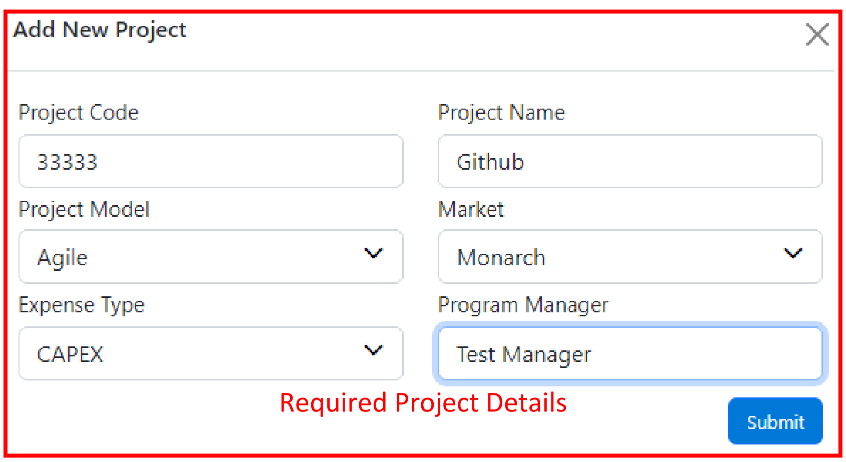
Capabilities accessible from the Project Details screen.

1. Admin can see details related to projects
2. Admin 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. Admin can also search a project.
4. Adding Project Detail
5. Editing Project Detail

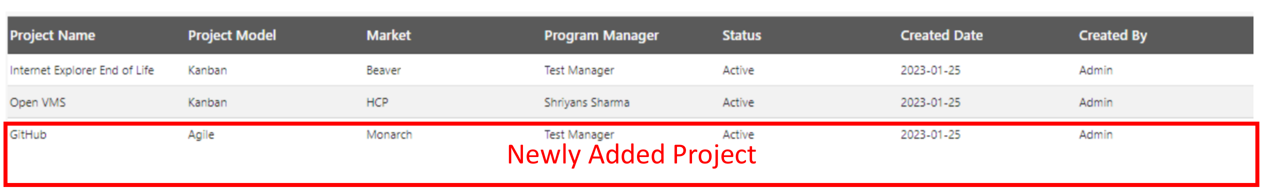
Steps to Add a Project

Step 1: Admin 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: Admin fills in the required field of the form and submits it. Project Model, Market and Expense Type are predefined set of information, and they are restricted to available options only.



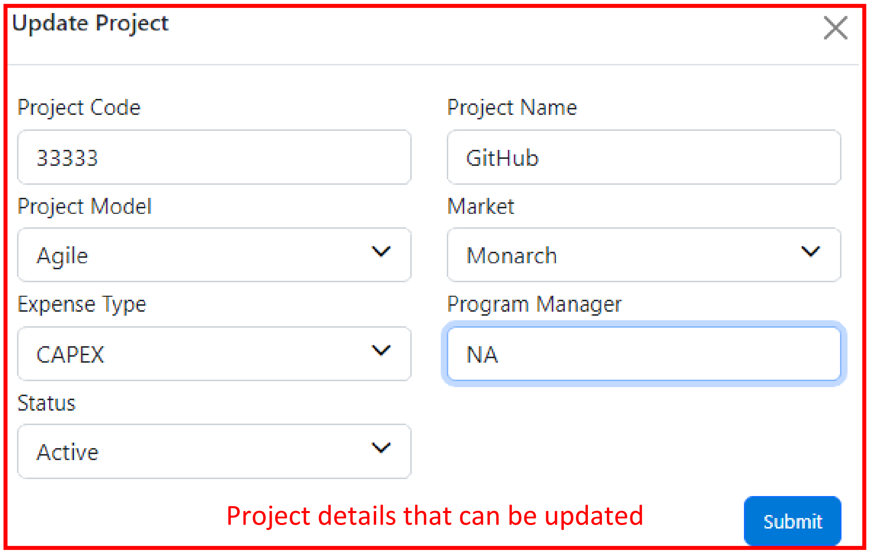
After successful addition of the project admin gets and alert and the newly added project can be seen on the project details screen as in the following screen.



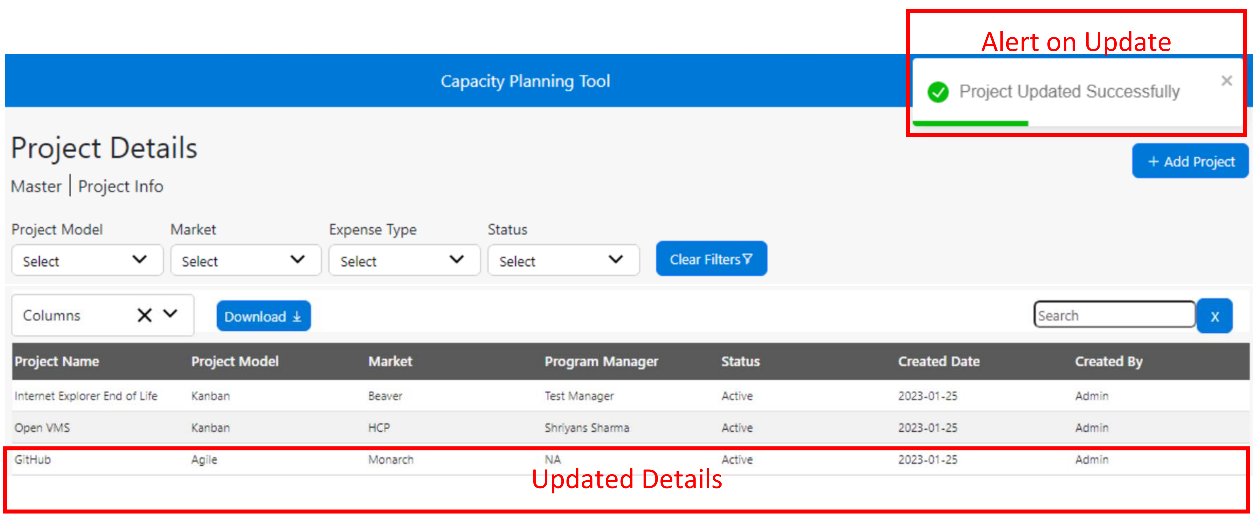
Project Name	Project Model	Market	Program Manager	Status	Created Date	Created By
Internet Explorer End of Life	Kanban	Beaver	Test Manager	Active	2023-01-25	Admin
Open VMS	Kanban	HCP	Shriyans Sharma	Active	2023-01-25	Admin
GitHub	Agile	Monarch	Test Manager	Active	2023-01-25	Admin

Steps to Update a Project

Step 1: Admin double clicks on a project details row available on the project details screen then a prepopulated form opens from the right side of the screen. If an admin does not want to update, he can click outside the form or can click on the “x” button available on the top right corner of the form.



Step 2: Admin can update the details with valid set of information and can submit it. All the updated information can be seen on the project details screen itself.

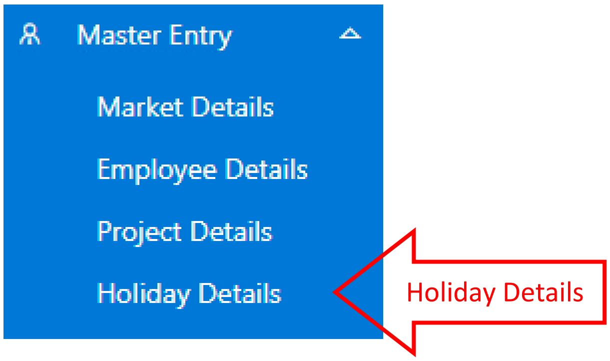


Holiday Details

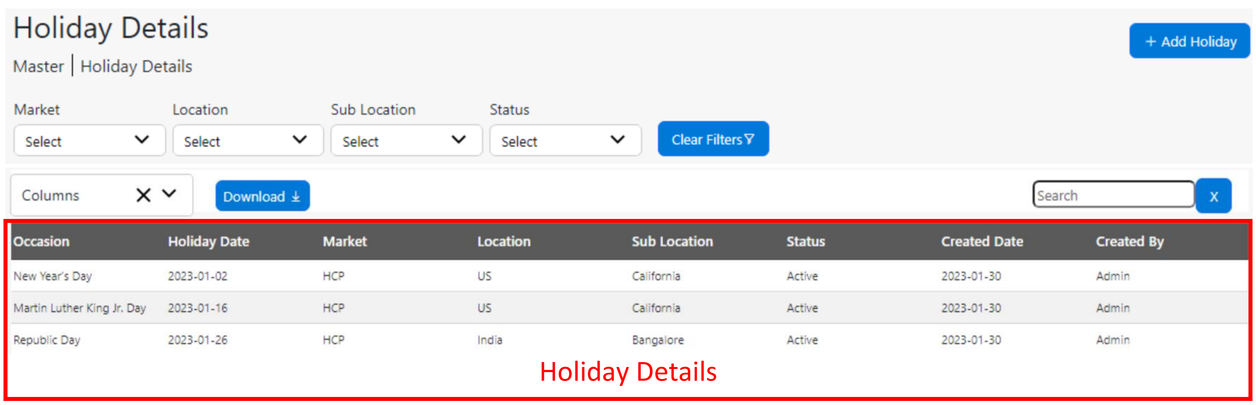
This screen provides capability to manage holidays, it provides details like market, location and other details applicable for a particular holiday.

Accessing the Holiday Details screen:

In order to access the Holiday Details Screen admin selects Holiday Details from the Master Entry dropdown of the left sidebar.

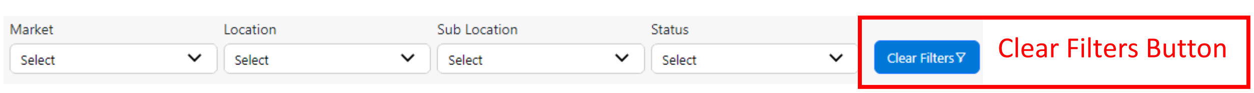


And after clicking the Holiday Details it navigates to following screen.



On this screen admin can see some details related to a holiday like the ocassion, date, market, location, sublocation and some other details as well.

On this screen we have a search functionality using it we can search on the basis of different fields. We also have filters and clear filter functionality. We can filter holidays on the basis of market, location, sublocation and their status whether they are active or inactive.



And once we are done with filters we can cancel all filters using the clear filter button.

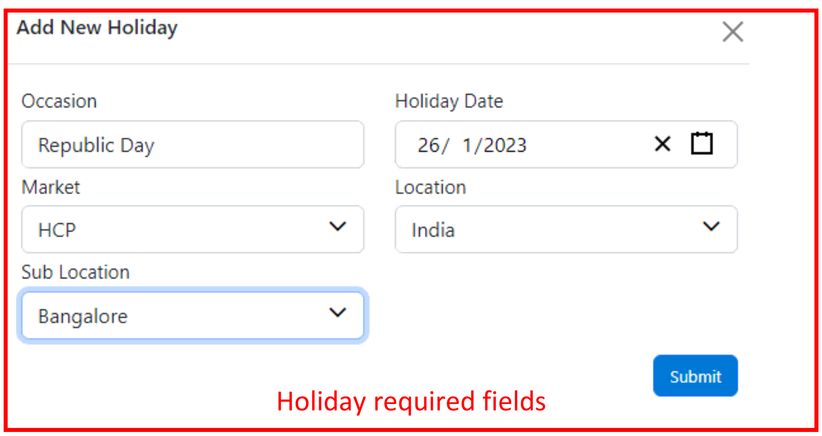
Capabilities available on this screen:

1. Admin can see details related to Holidays
2. Admin 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. Admin can also search a holiday.
4. Adding Holiday detail

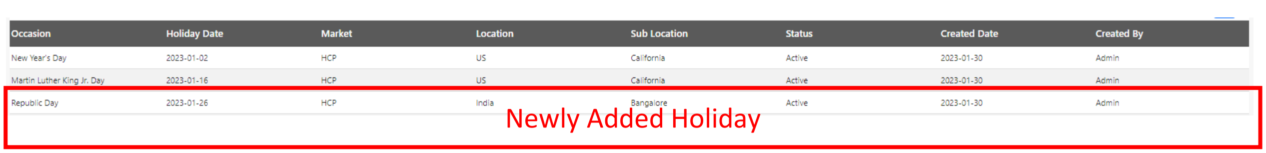
Steps to add a Holiday

Step 1: Admin 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: Admin fills in the required field of the form and submits it.



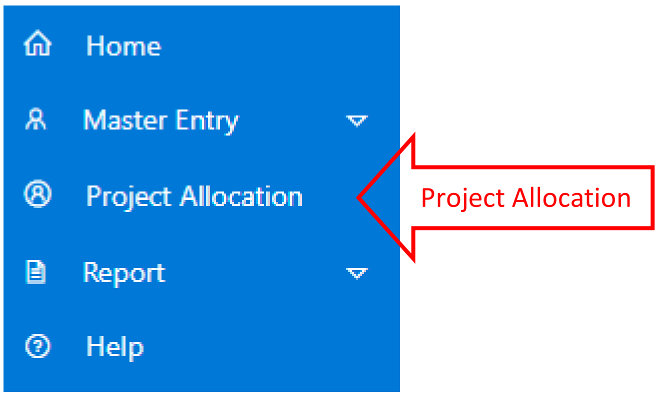
After successful addition admin gets alert and the holiday can be seen on the holiday details screen as in the following screen.



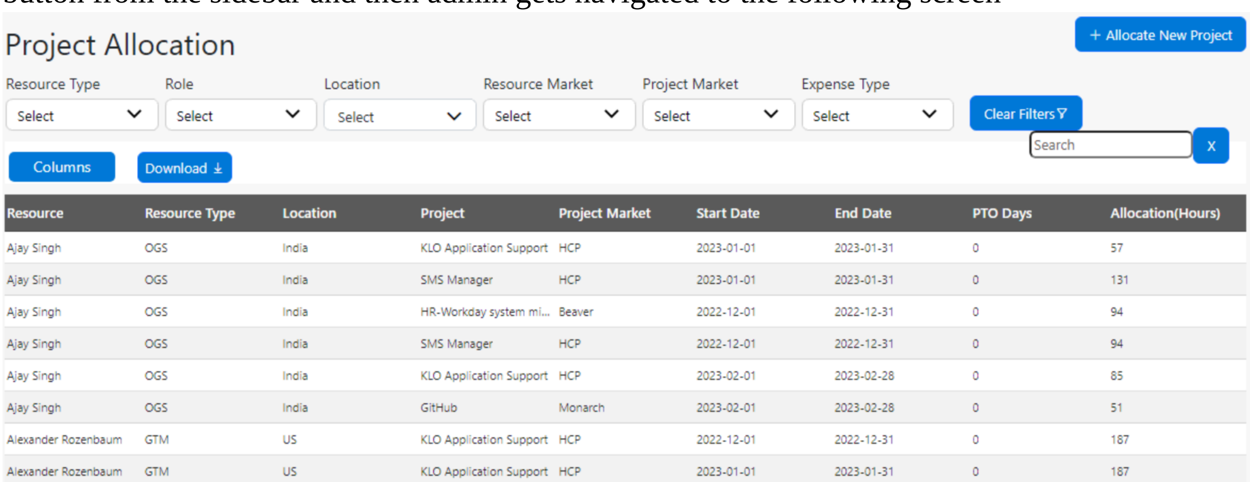
Occasion	Holiday Date	Market	Location	Sub Location	Status	Created Date	Created By
New Year's Day	2023-01-02	HCP	US	California	Active	2023-01-30	Admin
Martin Luther King Jr. Day	2023-01-16	HCP	US	California	Active	2023-01-30	Admin
Republic Day	2023-01-26	HCP	India	Bangalore	Active	2023-01-30	Admin

Project Allocation

This screen provides capability to see and manage employees' allocated hours and other project related details. Whenever an employee is aligned to a project then an admin can allocate the project by providing the resource name, project name, start date, end date, PTOs and the percentage of the allocation for the project.



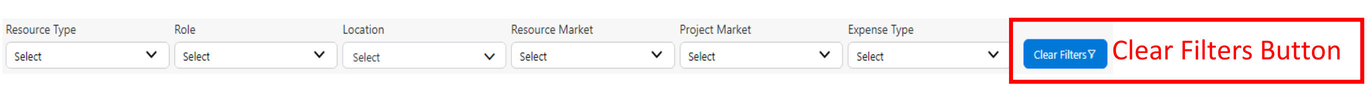
In order to access the Project Allocation Screen, admin has to click on the Project Allocation button from the sidebar and then admin gets navigated to the following screen



Resource	Resource Type	Location	Project	Project Market	Start Date	End Date	PTO Days	Allocation(Hours)
Ajay Singh	OGS	India	KLO Application Support	HCP	2023-01-01	2023-01-31	0	57
Ajay Singh	OGS	India	SMS Manager	HCP	2023-01-01	2023-01-31	0	131
Ajay Singh	OGS	India	HR-Workday system mi...	Beaver	2022-12-01	2022-12-31	0	94
Ajay Singh	OGS	India	SMS Manager	HCP	2022-12-01	2022-12-31	0	94
Ajay Singh	OGS	India	KLO Application Support	HCP	2023-02-01	2023-02-28	0	85
Ajay Singh	OGS	India	GitHub	Monarch	2023-02-01	2023-02-28	0	51
Alexander Rozenbaum	GTM	US	KLO Application Support	HCP	2022-12-01	2022-12-31	0	187
Alexander Rozenbaum	GTM	US	KLO Application Support	HCP	2023-01-01	2023-01-31	0	187

On this screen details like resource type, role on a project, supervisor for that project, location, market, project name, capacity in which the employee is aligned to that project, expense type, start date, end date can be accessed and managed by a valid admin. A valid admin can also export a pdf or a excel file with some columns of the total project allocations or filtered, if applied. Columns that can be exported are resource, resource type, location, project, project market, start date, end date, pto days and allocation hours.

Here we also have search functionality using it we can search on the basis of different fields. Apart from search we also have filters and clear filter functionality. We can filter allocated projects on the basis of market, location, sublocation and their status of activeness.



We can cancel all the applied filters using the clear filter button.

Download Selected Columns

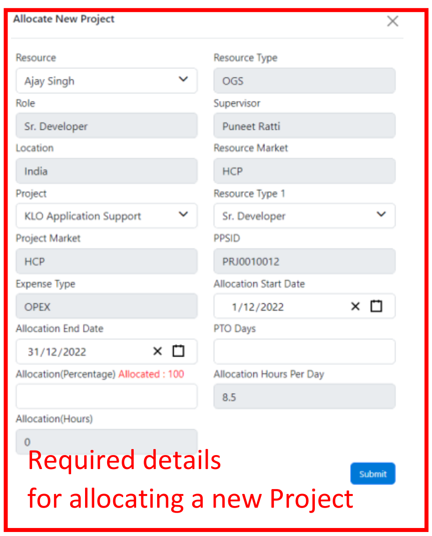
We have a column dropdown on this screen that has alreay selected seleccion fields for the columns that are visible on the screen but we can filter the columns that we want to download. But, if we don't filter the columns then already selected columns would be exprted.

Steps for allocating a project

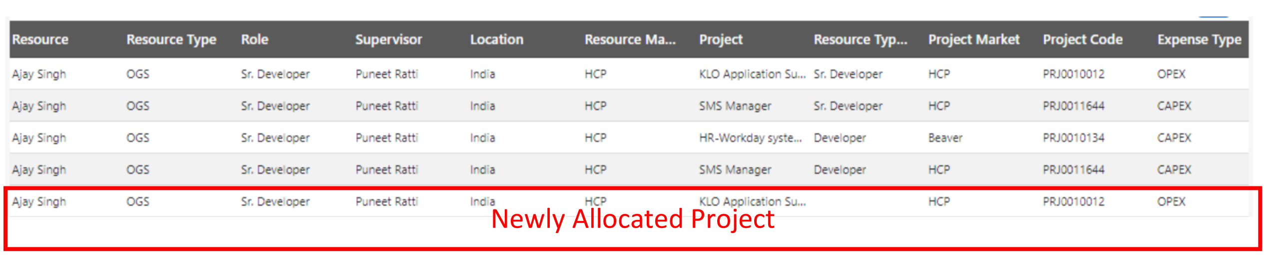
Step 1: Admin clicks on the "+ Allocate New Project" button available on the top right corner of the Project Allocation screen,

then following form opens-up with required fields.

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

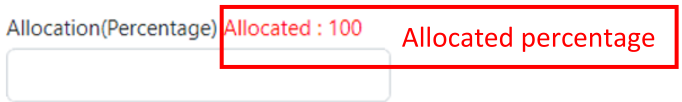


After successful addition admin gets alert and the employee on a new project and date can be seen on the project allocation screen as in the following screen.



Resource	Resource Type	Role	Supervisor	Location	Resource Ma...	Project	Resource Typ...	Project Market	Project Code	Expense Type
Ajay Singh	OGS	Sr. Developer	Puneet Ratti	India	HCP	KLO Application Su...	Sr. Developer	HCP	PRJ0010012	OPEX
Ajay Singh	OGS	Sr. Developer	Puneet Ratti	India	HCP	SMS Manager	Sr. Developer	HCP	PRJ0011644	CAPEX
Ajay Singh	OGS	Sr. Developer	Puneet Ratti	India	HCP	HR-Workday syste...	Developer	Beaver	PRJ0010134	CAPEX
Ajay Singh	OGS	Sr. Developer	Puneet Ratti	India	HCP	SMS Manager	Developer	HCP	PRJ0011644	CAPEX
Ajay Singh	OGS	Sr. Developer	Puneet Ratti	India	HCP	KLO Application Su...		HCP	PRJ0010012	OPEX

Allocation (Percentage)



We have this control that indicates the percentage of allocation hours that have already been allocated for some other project for the selected employee for the corresponding time span. If we have selected a time span that contains on one month that has been already allocated to a project for a particular employee, then it would reflect the sum of the percentage allocations for the already allocated month. And the allocated hours will appear only if we change any of these three fields namely resource, start sate and end date.

Allocation Hours Per Day

We also have allocation hours per day that indicates the hours per day an employee can be allocated for any project, and it is based on the resource and its type.

Allocation Hours Calculation

When we select resource, resource type, start date, end date and allocation percentage then we get an auto populated field allocation hours and allocation hours is being calculated according to following formula

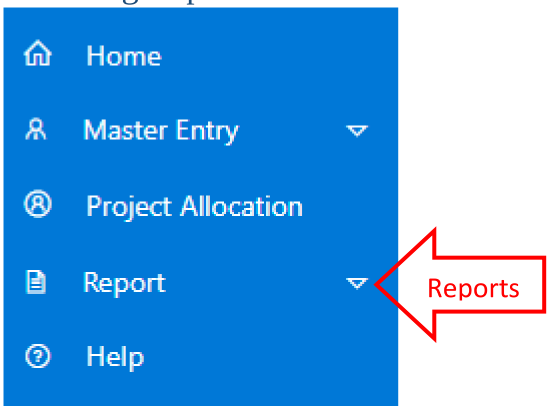
$$\text{Allocation hours} = \text{total working days} * \text{allocation hours per day} * allocation\ \text{percentage}$$

Where, total working days is the number of days in the selected time span except the number of PTOs, Saturdays, Sundays and holidays.

Reports

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

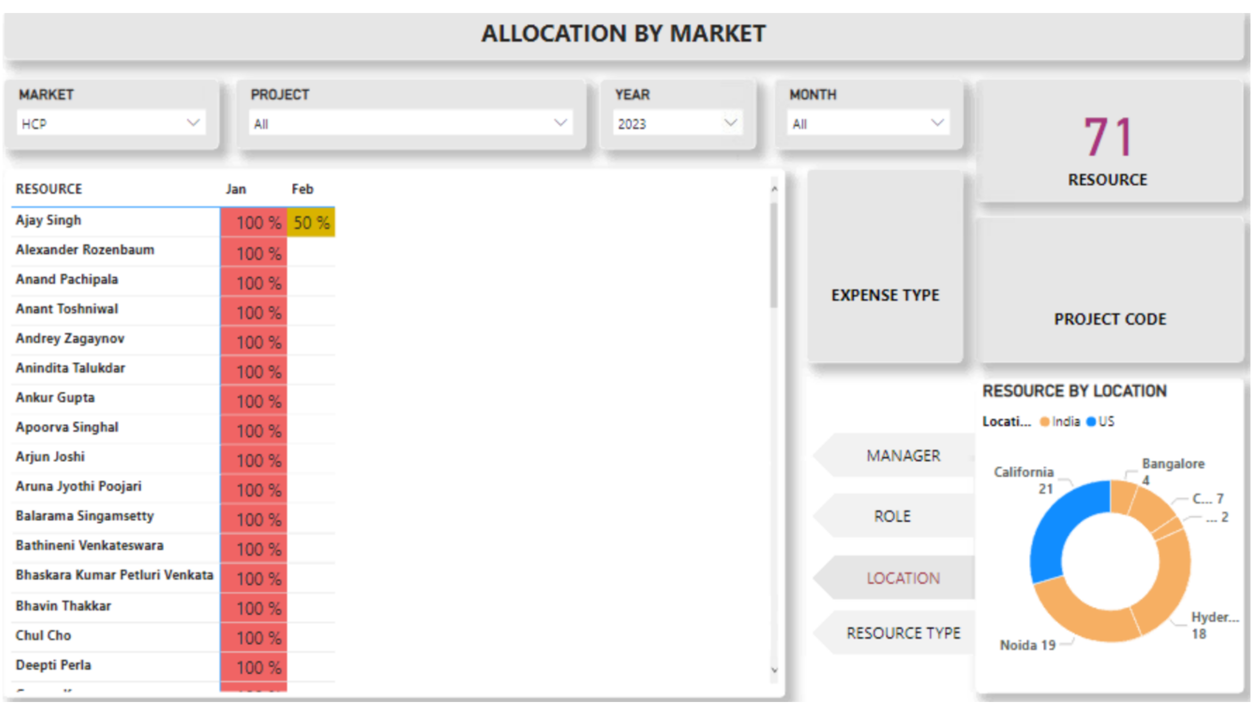
Accessing Reports Screen



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

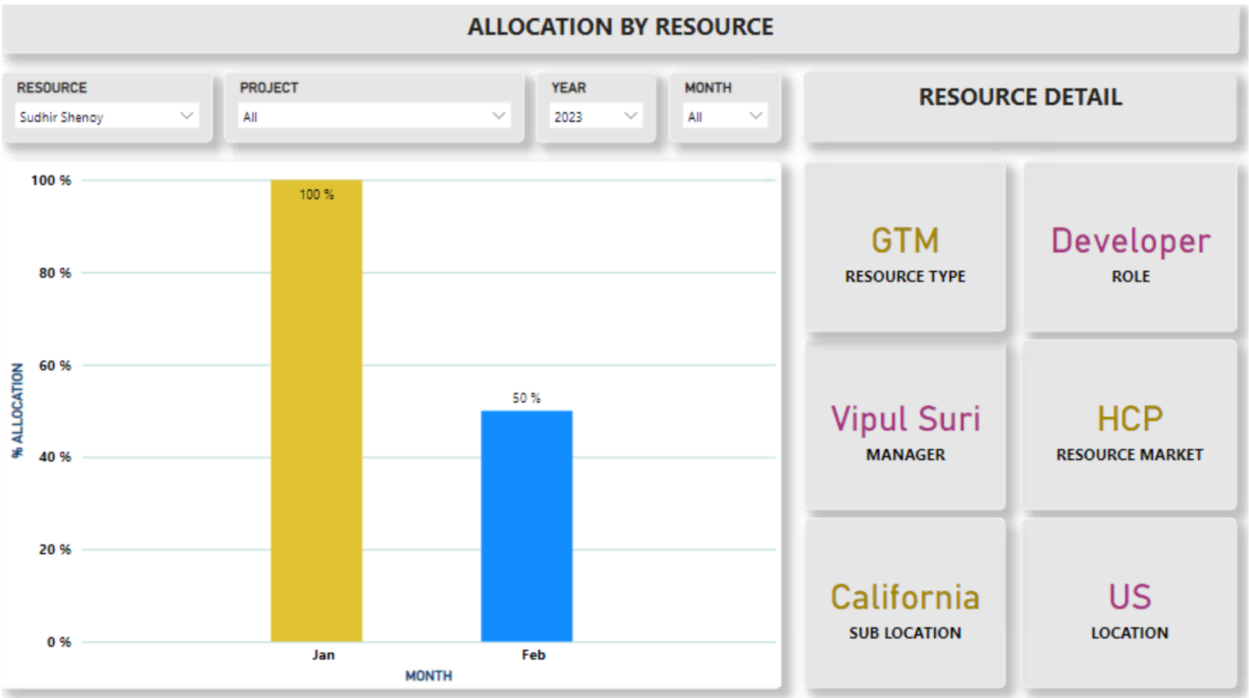
Allocation By Market

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 a particular project in each market. Initially it will show Allocation Percentage for all Resources in a particular market unless a particular project selected and provided with dropdowns for selecting year and months to filter the report according to year and month.



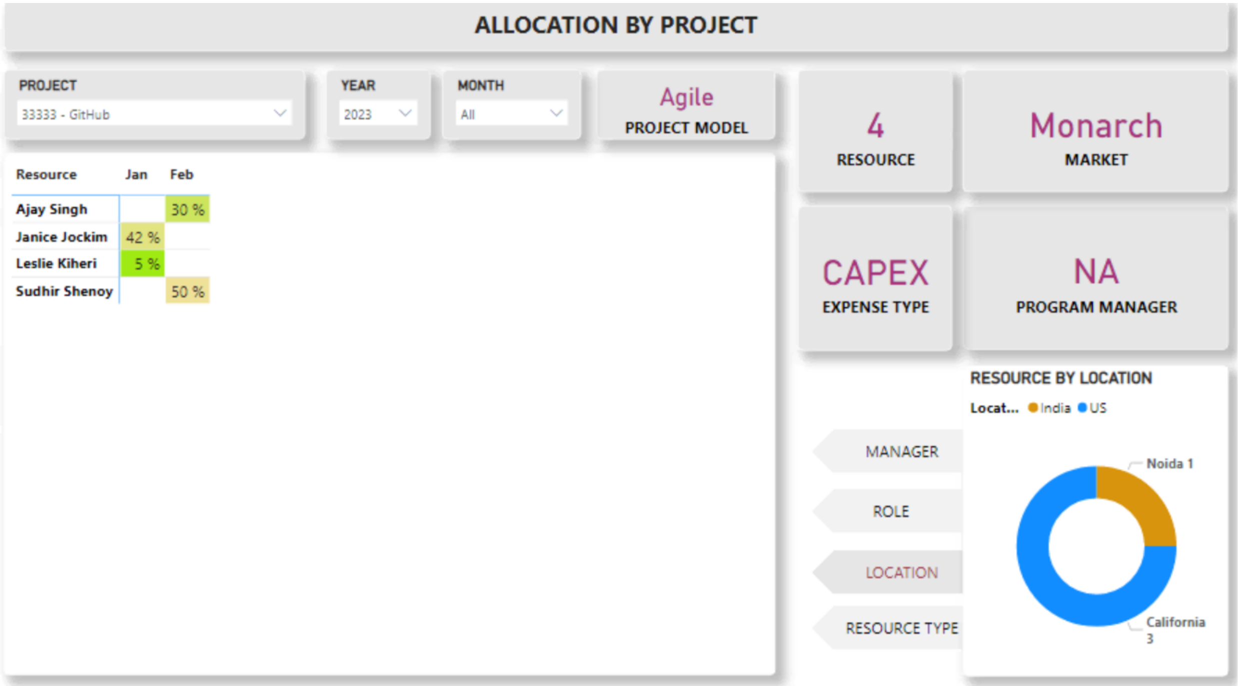
Allocation By Resource

This Report gives the details of Resources and their Allocation Percentages in various Projects and can select the year and months to filter the report for that provided with dropdowns for year and months. Apart from that it gives other details such as Resource Type, Role, Manager, Program Manager for a particular project and sublocation and location associated with resource.



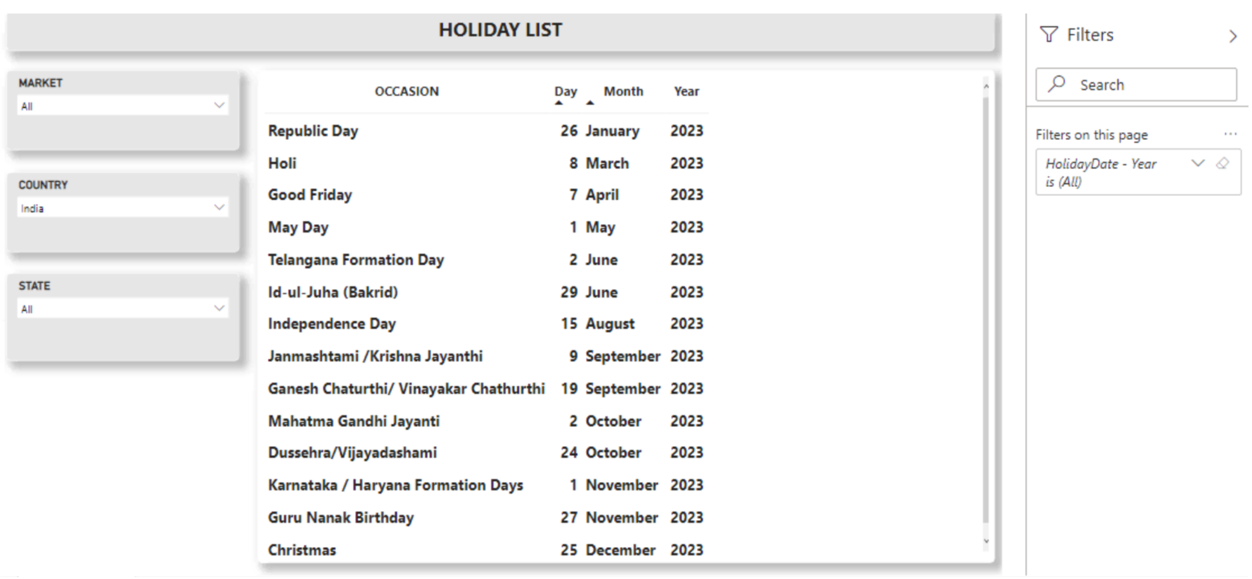
Allocation By Project

This Report gives details related to Projects, Resources included in a particular project and its Allocation Percentage within each project. It gives other details such as Project model, Expense Type, Market associated with it. The report is provided with dropdown for year and months to filter the report on the basis of year and months.



Holiday List

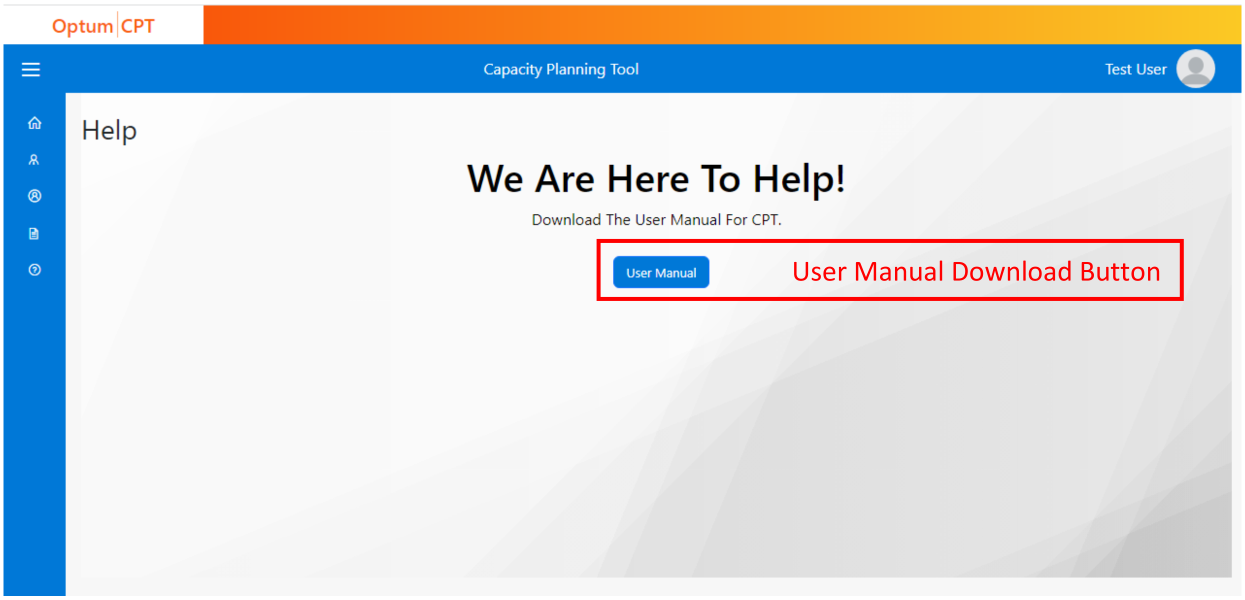
This Report gives details related to holiday for current year for each market and for each location and sub location. The filter dropdown for market, location and sublocation is provided in left pane and the Holiday List is shown on the right pane of the report.



OCCASION	Day	Month	Year
Republic Day	26	January	2023
Holi	8	March	2023
Good Friday	7	April	2023
May Day	1	May	2023
Telangana Formation Day	2	June	2023
Id-ul-Juha (Bakrid)	29	June	2023
Independence Day	15	August	2023
Janmashtami /Krishna Jayanthi	9	September	2023
Ganesh Chaturthi/ Vinayakar Chathurthi	19	September	2023
Mahatma Gandhi Jayanti	2	October	2023
Dussehra/Vijayadashami	24	October	2023
Karnataka / Haryana Formation Days	1	November	2023
Guru Nanak Birthday	27	November	2023
Christmas	25	December	2023

Help

Users can download 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.