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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.

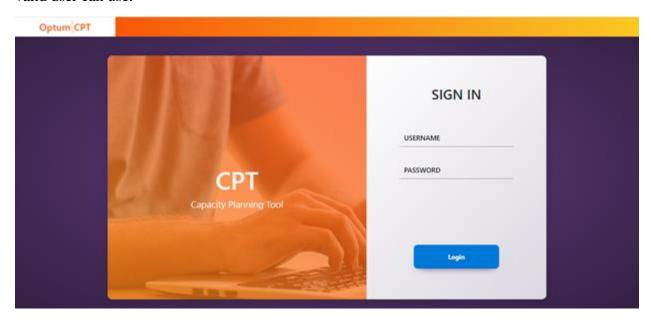
For better aid in utilization of the data capture from process, we have Power BI reports to represent different aspects of data analysis and visualization.



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

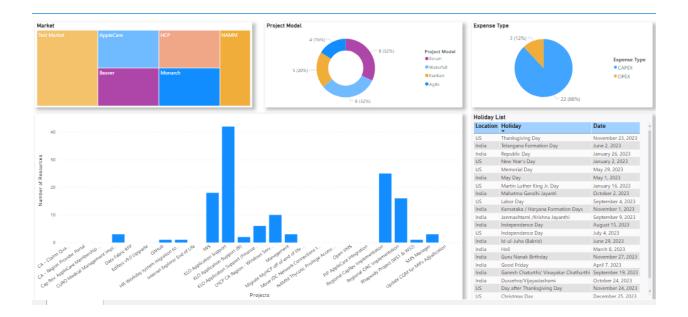


After clicking the Login button, both username as well as the password provided by the user is validated from the backend and if the credentials are valid, login is successful and user lands on the dashboard.



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.

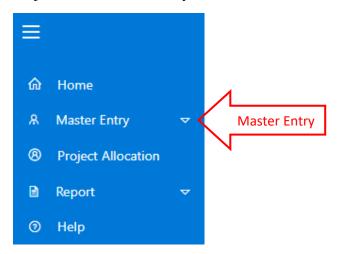


Dashboard with different graphs and charts related to ongoing projects and resources.



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. And it can be accessed from the sidebar on the left.

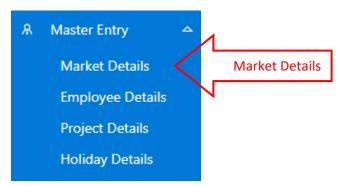


Market Details

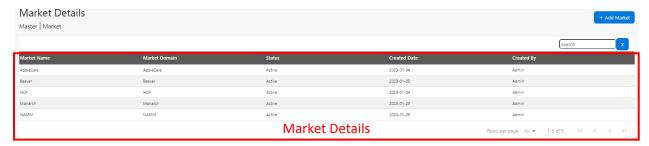
Market Details provides controls to manage different markets and their details such as their domain, status etc.

Accessing Market Details:

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



Step 2: User 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

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.

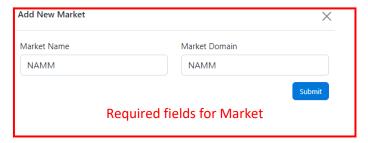
User can search, using which users can get details for a market. Apart from search user can also add Markets that are associating.

Steps to add a market

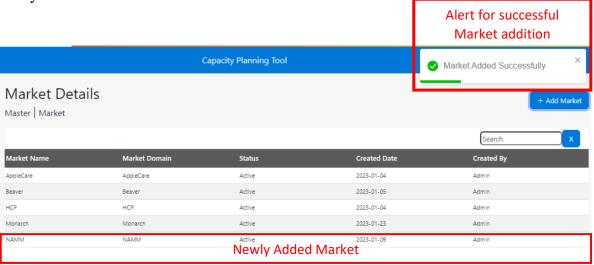
Step 1: On the Market Details tab user can find a button "+ Add Market" available on top right corner below the Username and profile picture. User clicks on the button then a form with required fields opens-up.



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



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

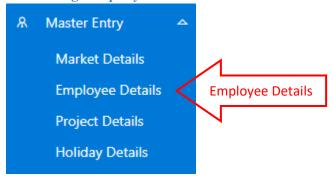




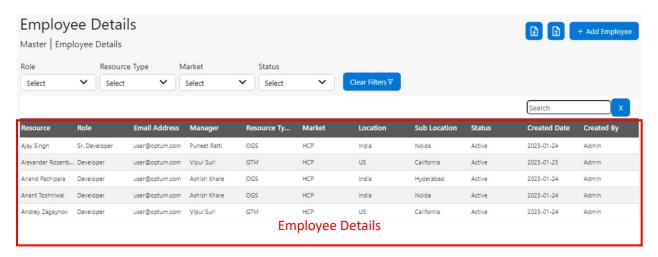
Employee Details

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



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, 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.



Capabilities accessible from the Employee Details screen.

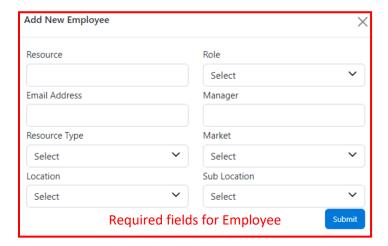
- 1. User can see details related to employees
- 2. User can also download the list of employees with afore-mentioned fields using the download button available beside the upload button.
- 3. User can see a list of employees and the list can be filtered as well on the basis of different filters namely
 - 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
- 7. Edit or Update Employee Details

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.



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.

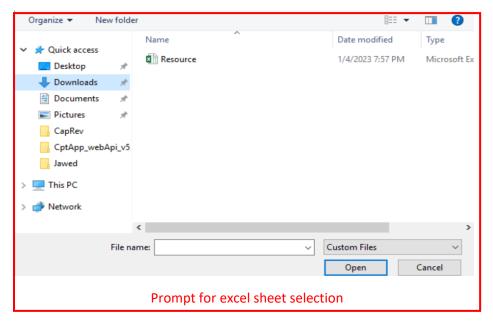


Steps for adding Employees' details in bulk:

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.



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

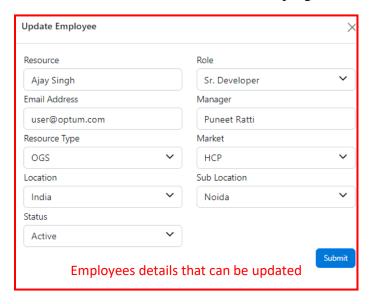


After successful upload, all the valid details get updated and user gets an alert. All newly added employees can be seen on the employee details screen.

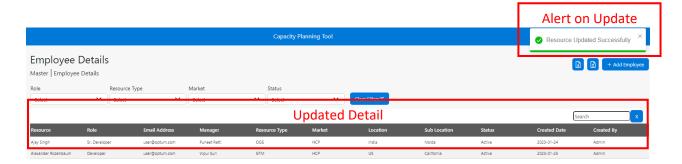


Steps for Updating an Employee Details

Step 1: User double clicks on an employee detail row then a prepopulated form opens from the right side of the screen. If a user 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: User 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.

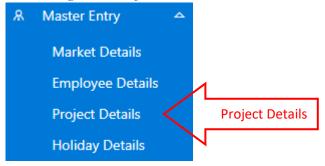




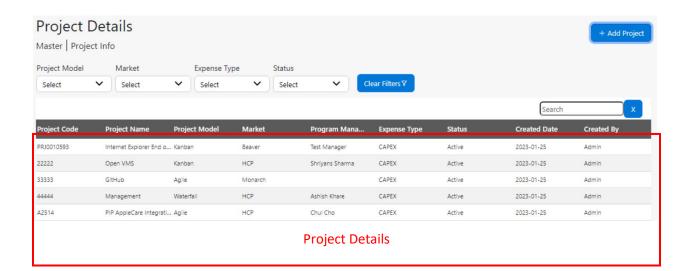
Project Details

This screen provides project management capability. From this screen user can see projects, their code, 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 dropdown under Master Entry of the sidebar, then it navigates to the following screen.



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.

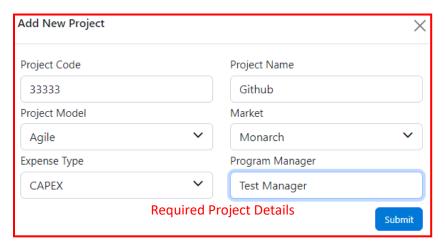
- 1. User can see details related to projects
- 2. User can see a list of projects and the list can be filtered as well on the basis of different filters namely
 - a. Project Model
 - b. Market
 - c. Expense Type
 - d. Status
- 3. User can also search a project.
- 4. Adding Project Detail
- 5. Editing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



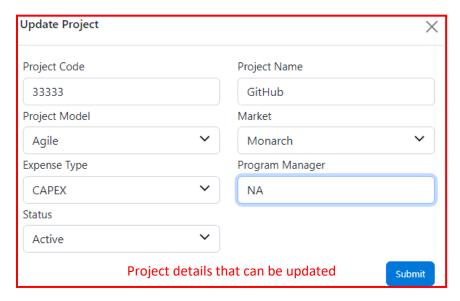
After successful addition of the project user gets and alert and the newly added project can be seen on the project details screen as in the following screen.



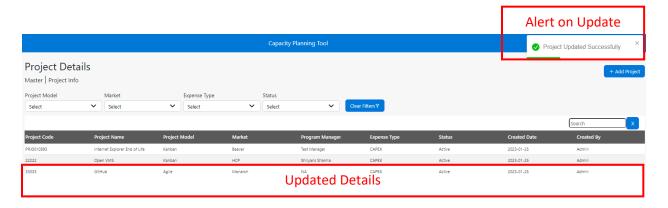


Steps to Update a Project

Step 1: User 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 a user 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: User 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.



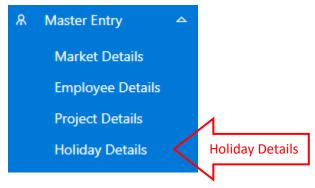


Holiday Details

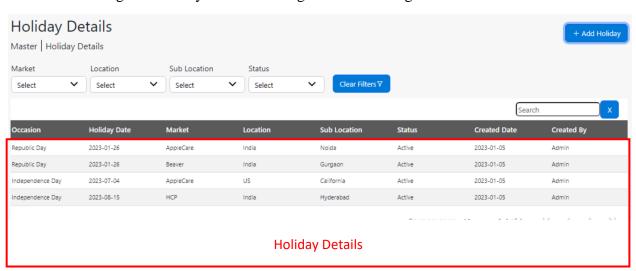
This screen provides capability to manage holidays, it provides details like market, location and other details applicable for a particular holiday.

Accessing the Holiday Details screen:

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

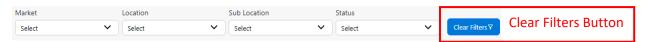


And after clicking the Holiday Details it navigates to following screen.



On this screen user 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:

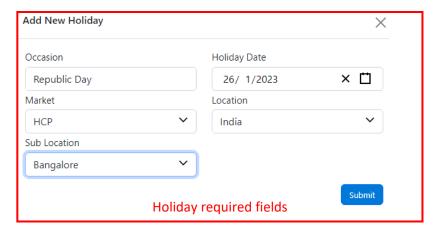
- 1. User can see details related to Holidays
- 2. User can see a list of Holidays and the list can be filtered as well on the basis of different filters namely
 - a. Market
 - b. Location
 - c. Sub Location
 - d. Status
- 3. User can also search a holiday.
- 4. Adding Holiday detail

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.



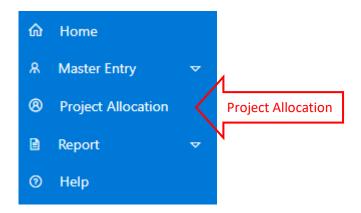
After successful addition user gets alert and the holiday can be seen on the holiday details screen as in the following screen.



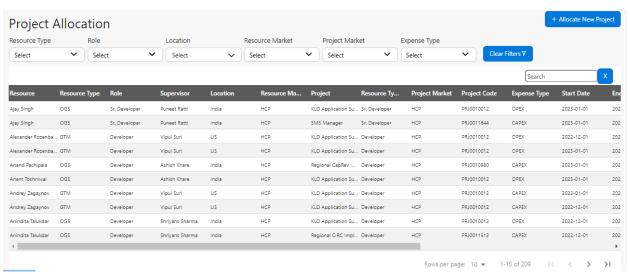


Project Allocation

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 a user 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, user has to click on the Project Allocation button from the sidebar and then user gets navigated to the following screen



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 user.

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.



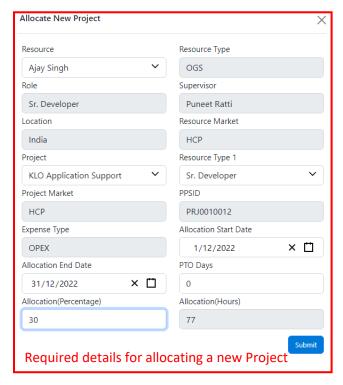
Steps for allocating a project

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.



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

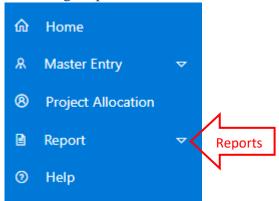




Reports

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

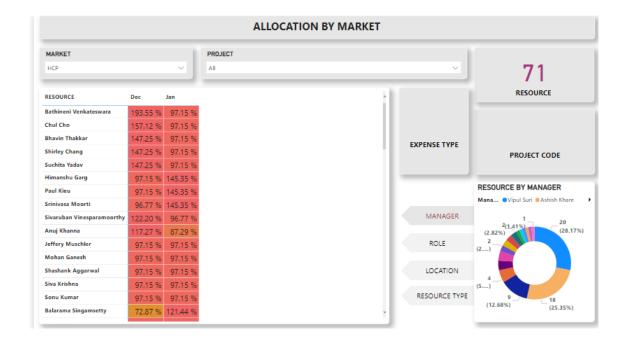
Accessing Reports Screen



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

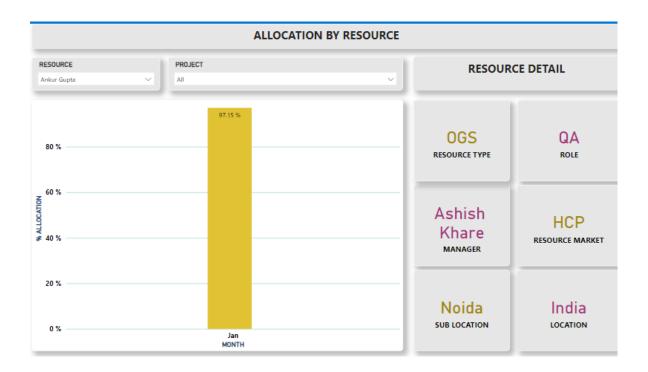
This Report gives details related to Market like Number of projects under each market and Resources under each project and shows Allocation Percentage for each resource under particular project in each market. Initially it will show Allocation Percentage for all Resources in a particular market unless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





Allocation By Resource

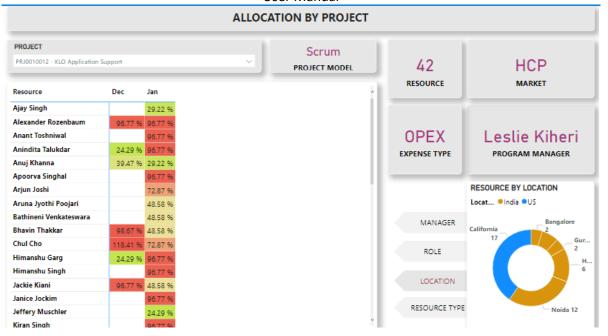
This Report gives details related to Projects, Resources included in particular project and its Allocation Percentage within each project. It gives other details such as Project model, Expense Type, Market associated with it. One can also check the Managers, Resource Type, Roles and Location of various 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

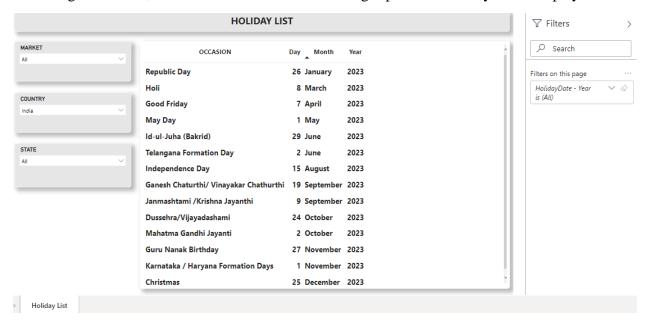
This Report gives details related to Market like Number of projects under each market and Resources under each project and shows Allocation Percentage for each resource under a particular project in each market. Initially it will show Allocation Percentage for all Resources in a particular market unless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





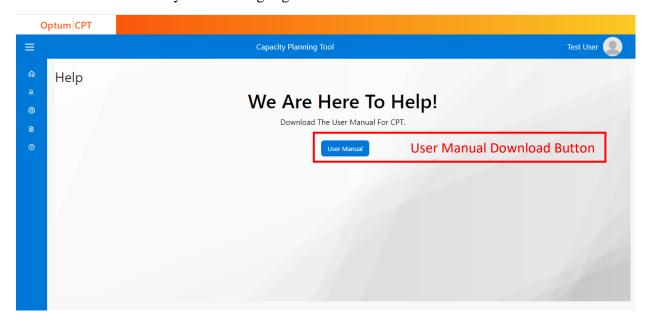
Holiday List

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.

