

## Contents

Introduction.....	2
Capacity Planning Tool (CPT).....	2
Pages and Capabilities .....	3
Login Screen .....	3
Dashboard .....	4
Master Entry.....	5
Market Details.....	5
Resource Details .....	7
Project Details.....	12
Holiday Details .....	14
PTO Details.....	17
Project Allocation .....	21
Reports .....	26
Accessing Reports Screen.....	26
Allocation By Market .....	26
Allocation By Resource & PTO Tracker .....	27
Allocation By Project.....	28
Holiday List .....	29
Help.....	30
Logout.....	30

## 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 Resource, 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.

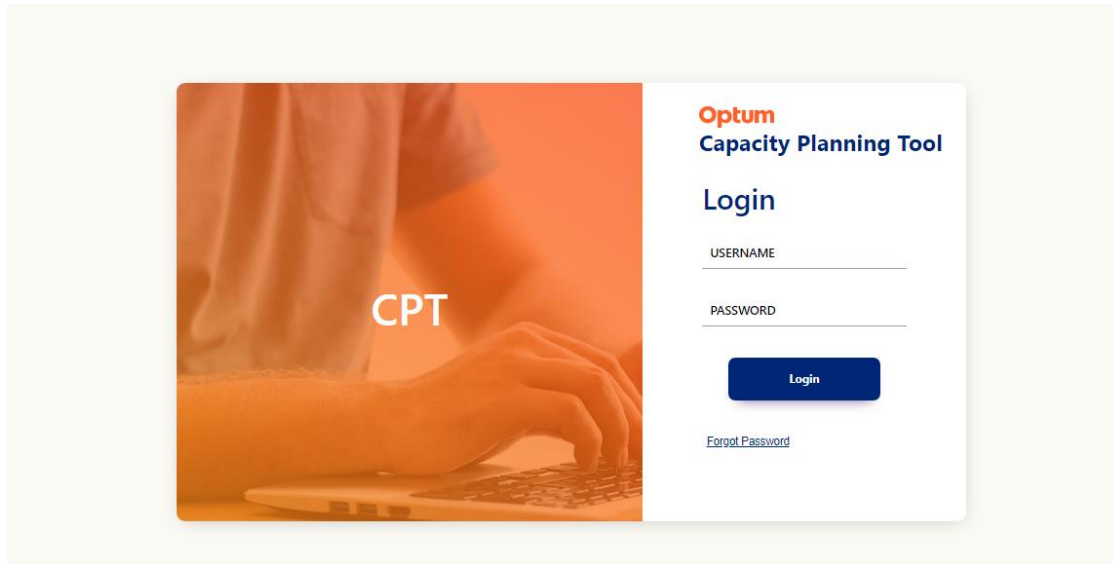
Agenda for this implementation is to bring multiple applications such as PPM Optics, TFS sprint, etc. on one platform for different markets. With the help of this tool, we can have all entry like Projects, Resources, Holidays, Markets, etc. directly from dedicated Master pages, furthermore from Project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

#### Login

USERNAME	Username
PASSWORD	Password

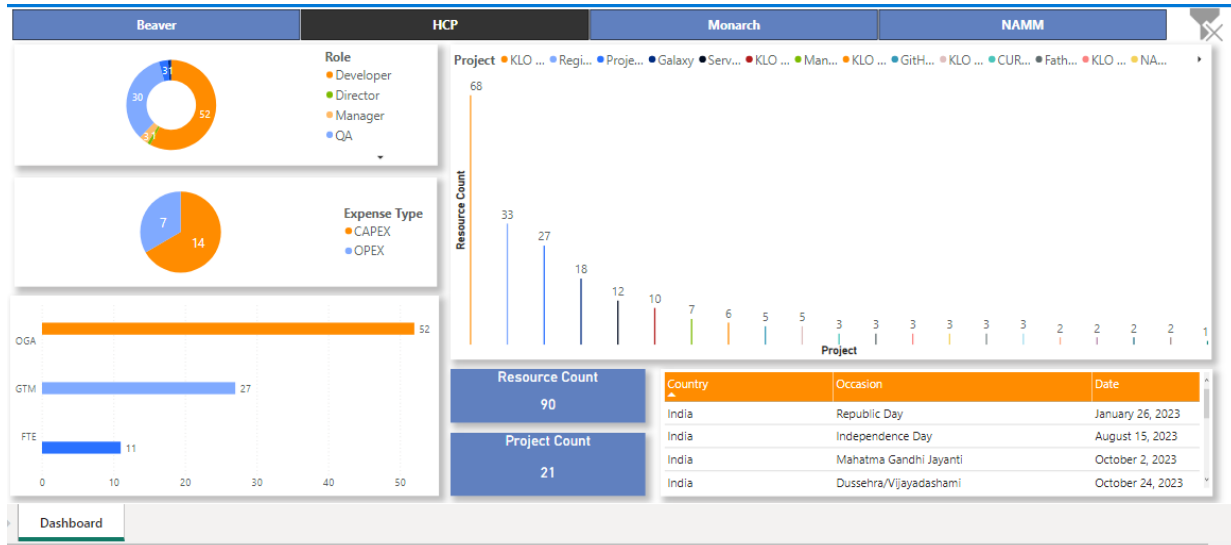
**Step 2:** User clicks the Login button

Login	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 role, Expense Type and Holiday data. We have visuals on Project role 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



- Dashboard
- Master Entry
- Project Allocation
- Report

### General User



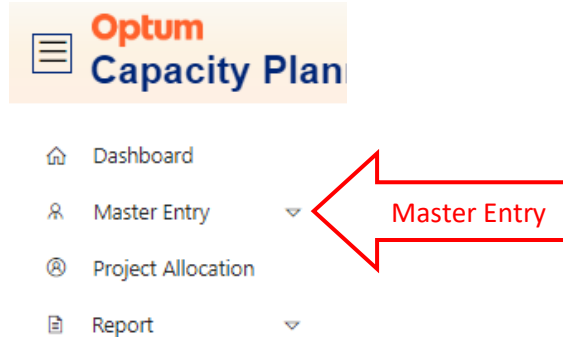
- Dashboard
- Report

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, Resource Details, Project Details and Holiday Details. And it can be accessed from the sidebar on the left.

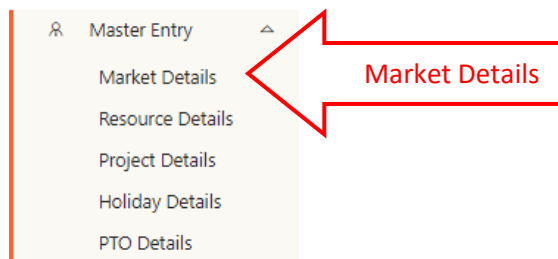


## Market Details

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

### Accessing Market Details:

**Step 1:** To access Market Details admin clicks on the Market Details dropdown under Master Entry.



**Step 2:** Admin gets navigated to following screen

The screenshot shows the 'Market Details' screen. At the top, there is a header 'Market Details' and a '+ Add Market' button. Below the header, there is a 'Status' filter set to 'Active' and a 'Clear Filters' button. There are also 'Columns' and 'Download' buttons. A search bar is located on the right. The main part of the screen is a table with the following data:

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

At the bottom of the table, there is a pagination bar showing 'Rows per page: 10', '1-4 of 4', and navigation arrows.

We have a search functionality using that we can search based on different values.

## User Manual

*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.

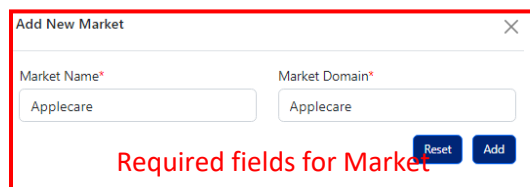
Admin can search, using which admins can get details for a market. Apart from search admin can also add Markets that are associating.

*Steps to add a market*

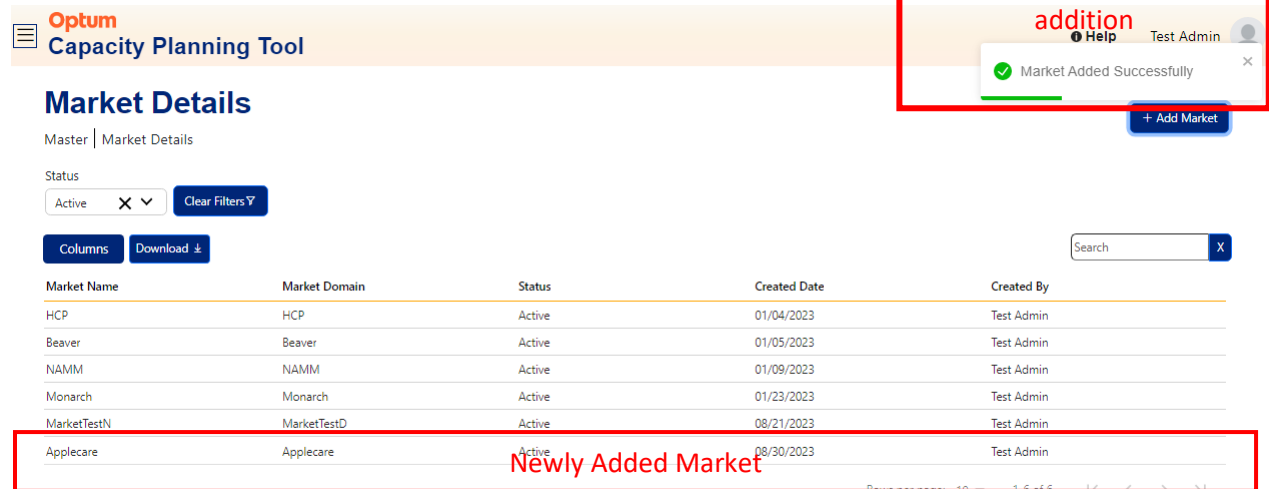
**Step 1:** On the Market Details tab admin can find a button “+ Add Market” available on top right corner below the Username and profile picture. Admin clicks on the button then a form with required fields opens-up.



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

A form titled 'Add New Market' with a close button (X). It contains two input fields: 'Market Name\*' and 'Market Domain\*', both containing the text 'Applecure'. Below the fields are 'Reset' and 'Add' buttons. A red text label 'Required fields for Market' is overlaid on the form.

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

The screenshot shows the 'Optum Capacity Planning Tool' interface. The 'Market Details' tab is active, showing a list of markets. A red box highlights the 'Add New Market' form from the previous step. Another red box highlights a green alert message: 'Alert for successful Market addition' with a checkmark icon and the text 'Market Added Successfully'. Below the alert, the 'Market Details' table is visible, showing a list of markets with columns: Market Name, Market Domain, Status, Created Date, and Created By. The newly added market 'Applecure' is highlighted with a red box and labeled 'Newly Added Market' in red text. The table data is as follows:

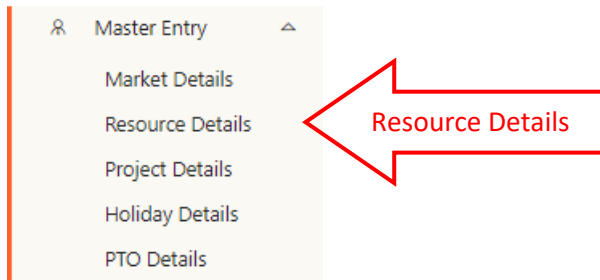
Market Name	Market Domain	Status	Created Date	Created By
HCP	HCP	Active	01/04/2023	Test Admin
Beaver	Beaver	Active	01/05/2023	Test Admin
NAMM	NAMM	Active	01/09/2023	Test Admin
Monarch	Monarch	Active	01/23/2023	Test Admin
MarketTestN	MarketTestD	Active	08/21/2023	Test Admin
Applecure	Applecure	Active	08/30/2023	Test Admin

## User Manual

## Resource Details

Resource Details provides the capability to manage the Resources 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 Resource Details



To access Resource Details admin selects Resource Details tab under Master Entry of the sidebar, then it navigates to the following screen.

### Resource Details

Master | Resource Details

Role: Select Manager: Select Resource Type: Select Market: Select Status: Active X Clear Filters

Columns Download

Search X

Resource	Role	Manager	Resource Type	Market	Location	Sub Location	Status	Created Date	Created By
Ajay Singh	Developer	Ashish Khare	OGA	HCP	India	Noida	Active	01/24/2023	Test Admin
Akshay Madan	Developer	Vipul Suri	GTM	HCP	US	California	Active	05/31/2023	Test Admin
Alexander Rozenba...	Developer	Vipul Suri	GTM	HCP	US	California	Active	01/25/2023	Test Admin
Amarendra Bojja	QA	Sivaruban Vinespar...	GTM	HCP	US	California	Active	05/31/2023	Test Admin
Amit Singh Chauhan	Developer	Ashish Khare	OGA	HCP	India	Hyderabad	Active	05/31/2023	Test Admin
Anand Pachipala	Developer	Ashish Khare	OGA	HCP	India	Hyderabad	Active	01/24/2023	Test Admin
Anant Toshniwal	Developer	Ashish Khare	OGA	HCP	India	Noida	Active	01/24/2023	Test Admin
Andrey Zagaynov	Developer	Vipul Suri	GTM	HCP	US	California	Active	01/24/2023	Test Admin
Anindita Talukdar	Developer	Ashish Khare	OGA	HCP	India	Noida	Active	01/25/2023	Test Admin
Ankur Gupta	QA	Sivaruban Vinespar...	OGA	HCP	India	Noida	Active	01/24/2023	Test 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 Resources on the basis of role, manager, resource type, market and their status of activeness.

Role: Select Manager: Select Resource Type: Select Market: Select Status: Active X Clear Filters

Clear Filters Button

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

## Download Selected Columns

Columns Select columns to export

## User Manual

On all the master pages, we have a column dropdown on this screen. It has some already selected selection 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 exported.

*Capabilities accessible from the Resource Details screen.*

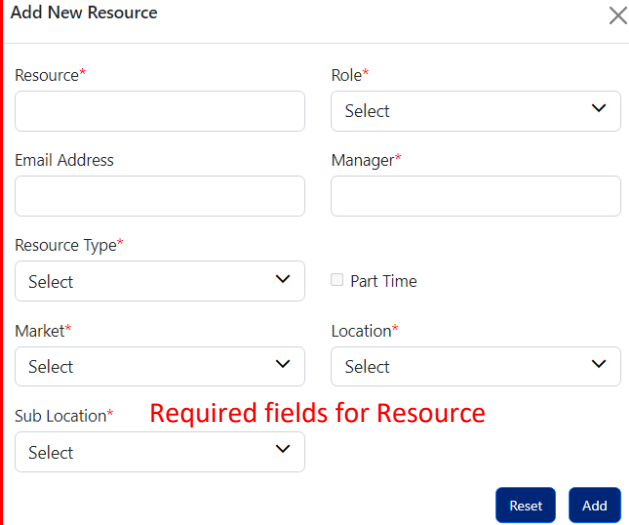
1. Admin can see details related to Resources
2. Admin can also download the list of Resources with afore-mentioned fields using the Export button beneath the filter.
3. Admin can see a list of Resources and the list can be filtered as well on the basis of different filters namely
  - a. Role
  - b.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

*Steps for Adding Individual Resources:*

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

A blue button with a white plus sign and the text '+ Add Resource'. To its right is a red tooltip box containing the text 'Add new Resource from here' in red.

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

A screenshot of a web form titled 'Add New Resource' with a close button (X) in the top right corner. The form contains several input fields and dropdown menus. The fields are arranged in two columns. The first column contains 'Resource\*' (text input), 'Email Address' (text input), 'Resource Type\*' (dropdown menu), 'Market\*' (dropdown menu), and 'Sub Location\*' (dropdown menu). The second column contains 'Role\*' (dropdown menu), 'Manager\*' (text input), and 'Location\*' (dropdown menu). There is a 'Part Time' checkbox between 'Resource Type' and 'Location'. At the bottom right of the form are two buttons: 'Reset' and 'Add'. A red text label 'Required fields for Resource' is positioned to the right of the 'Sub Location\*' dropdown menu.

Add New Resource

Resource\* Role\*

Email Address Manager\*

Resource Type\* ☐ Part Time

Market\* Location\*

Sub Location\* Required fields for Resource

Reset Add

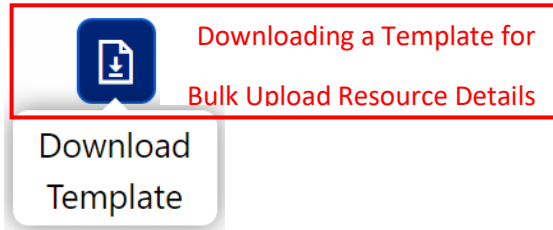


## User Manual

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

### *Downloading A Template of Resource Details*

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



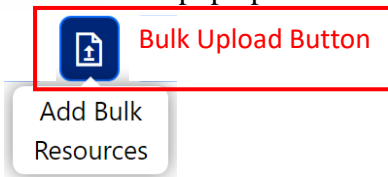
### *Export Resource Details*

For all the master pages, admins can export Resource 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.



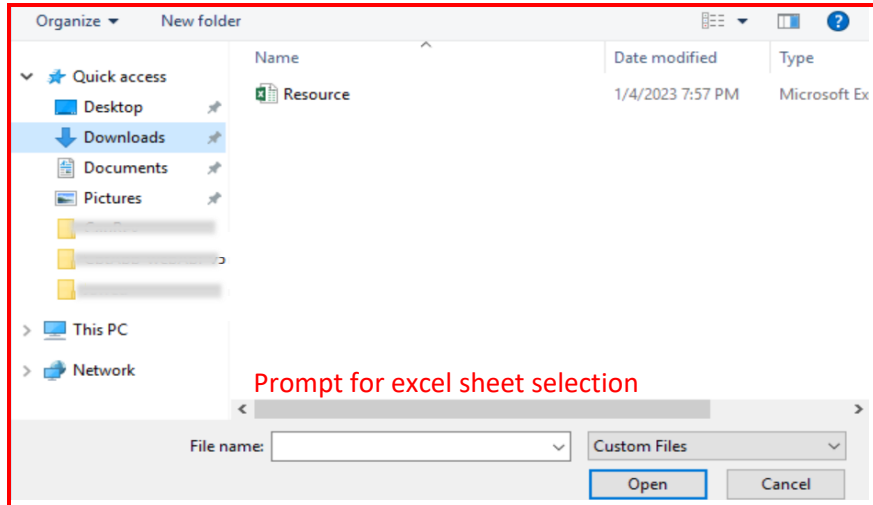
### *Steps for adding Resources' details in bulk:*

**Step 1:** Admin selects the second button available on top right corner of the Resource 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 Resource details. After selecting the file admin submits.

## User Manual



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

### *Steps for Updating a Resource Details*

**Step 1:** Admin double clicks on a resource 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.

The 'Update Resource' form is displayed with the following details:

Field	Value
Resource*	Amarender Bojja
Role*	QA
Email Address	user@optum.com
Manager*	Sivaruban Vinesparamoorthy
Resource Type*	FTE
Market*	HCP
Location*	US
Sub Location*	California
Status	Active

Buttons: Update, Delete

## User Manual

**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 Resource details screen itself.

**Alert on Update**  
Help Test Admin  
Resource Updated Successfully

### Resource Details

Master | Resource Details

Role Manager Resource Type Market Status  
Select Select Select Select Active X Clear Filters

Columns Download

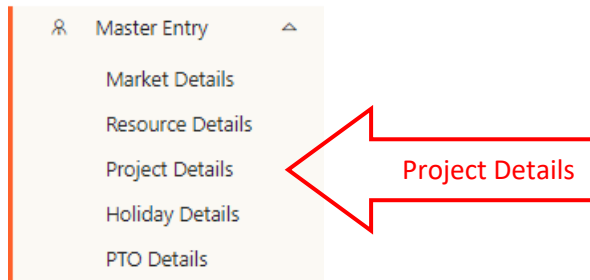
Resource	Role	Manager	Resource Type	Market	Location	Sub Location	Status	Created Date	Created By
Ajay Singh	Developer	Ashish Khare	OGA	HCP	India	Noida	Active	01/24/2023	Test Admin
Akshay Madan	Developer	Vipul Suri	GTM	HCP	US	California	Active	05/31/2023	Test Admin
Alexander Rozenba...	Developer	Vipul Suri	GTM	HCP	US	California	Active	01/23/2023	Test Admin
Amarendra Bojja	QA	Sivaruban Vinespar...	FTE	HCP	India	California	Active	05/31/2023	Test Admin
Amr Singh Chauhan	Developer	Ashish Khare	OGA	HCP	India	Hyderabad	Active	05/31/2023	Test Admin
Anand Pachipala	Developer	Ashish Khare	OGA	HCP	India	Hyderabad	Active	01/24/2023	Test Admin
Anant Toshniwal	Developer	Ashish Khare	OGA	HCP	India	Noida	Active	01/24/2023	Test Admin
Andrey Zagaynov	Developer	Vipul Suri	GTM	HCP	US	California	Active	01/24/2023	Test Admin

Updated Detail

## 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



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

## Project Details

Master | Project Details

+ Add Project

Project Model Project Market Expense Type Status  
Select Select Select Active X Clear Filters

Columns Download

Search X

Project Code	Project Name ▲	Project Model	Project Market	Project Manager	Expense Type	Status	Created Date	Created By
PRJ0010550	AppleCare Migration t...	Agile	HCP		CAPEX	Active	01/09/2023	Test Admin
PRJ0010052	CURO Medical Manag...	Agile	HCP		CAPEX	Active	01/19/2023	Test Admin
PRJ0010077	Data Fabric RFP	Agile	HCP		CAPEX	Active	01/19/2023	Test Admin
PRJ0010536	Fathom Coding	Agile	HCP		CAPEX	Active	01/09/2023	Test Admin
PRJ0010269	Galaxy	Agile	HCP		CAPEX	Active	01/09/2023	Test Admin
33333	GitHub	Agile	HCP		CAPEX	Active	01/25/2023	Test Admin
PRJ0010012	KLO Application Supp...	Agile	HCP		OPEX	Active	01/09/2023	Test Admin
PRJ0010012	KLO Application Supp...	Agile	HCP		OPEX	Active	01/25/2023	Test Admin
PRJ0010012	KLO Application Supp...	Agile	HCP		OPEX	Active	01/25/2023	Test Admin
PRJ0010012	KLO COP	Agile	HCP		OPEX	Active	01/09/2023	Test 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.

Project Model Project Market Expense Type Status  
Select Select Select Active X Clear Filters Clear Filters Button

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

## User Manual

*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 based on 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
6. Adding Projects in bulk

*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.

 A form titled 'Add New Project' with a close button (X). It contains the following fields:
 

- Project Code\*: 66666
- Project Name\*: Secure Project
- Project Model\*: Agile (dropdown)
- Market\*: HCP (dropdown)
- Expense Type: CAPEX (dropdown)
- Project Manager: (empty field)

 At the bottom right are 'Reset' and 'Add' buttons. Below the form, the text 'Required Project Details' is written in red.

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

Project Code	Project Name ▲	Project Model	Project Market	Project Manager	Expense Type	Status	Created Date	Created By
PRJ0010012	KLO CapRev	Agile	HCP		OPEX	Active	01/09/2023	Test Admin
PRJ0010012	KLO FOD	Agile	HCP		OPEX	Active	01/09/2023	Test Admin
44444	Management	Agile	HCP	Ashish Khare	OPEX	Active	01/25/2023	Test Admin
PRJ0010237	NAMM Conversion ...	Agile	HCP		CAPEX	Active	01/09/2023	Test Admin
PRJ0010281	Project Shark Macr...	Agile	HCP		CAPEX	Active	01/09/2023	Test Admin
PRJ0010580	Regional CapRev Im...	Agile	HCP		CAPEX	Active	01/19/2023	Test Admin
PRJ0010079	Rhapsody Project (...)	Agile	HCP		CAPEX	Active	01/25/2023	Test Admin
PRJ0011644	SMS Manager	Agile	HCP		CAPEX	Active	01/25/2023	Test Admin
66666	Secure Project	Agile	HCP		CAPEX	Active	01/09/2023	Test Admin

Newly Added Project

### 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.

Project details that can be updated

**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.

Alert on Update

Project Updated Successfully

Project Code	Project Name	Project Model	Project Market	Project Manager	Expense Type	Status	Created Date	Created By
12121	AllScripts (QA)	Agile	HCP	Leslie Kiheri	CAPEX	InActive	01/09/2023	Test Admin
PRJ0010558	AppleCare Migration	Agile	HCP	Leslie Kiheri	CAPEX	Active	01/09/2023	Test Admin
PRJ0010558	CA - Claims Quality...	Agile	HCP	Leslie Kiheri	CAPEX	InActive	01/25/2023	Test Admin

Updated Details

### Steps of Adding Projects in Bulk

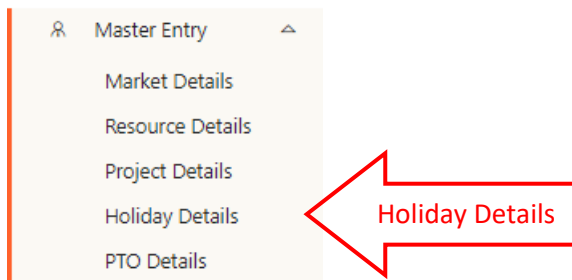
Similar adding resources in bulk we have adding projects in bulk facility on Project Details page. We can download the Project Details template and then populate the sheet with data and then upload that file to add projects in bulk.

## 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:*

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.

### Holiday Details

Master | Holiday Details

+ Add Holiday

Market: Select Location: Select Sub Location: Select Status: Active X Clear Filters

Columns Download

Occasion	Holiday Date	Market	Location	Sub Location	Status	Created Date	Created By
New Year's Day	01/01/2023	HCP	US	California	Active	01/30/2023	Test Admin
Martin Luther King Jr. ...	01/16/2023	HCP	US	California	Active	01/30/2023	Test Admin
Republic Day	01/26/2023	HCP	India	Bangalore	Active	01/30/2023	Test Admin
Republic Day	01/26/2023	HCP	India	Chennai	Active	01/30/2023	Test Admin
Republic Day	01/26/2023	HCP	India	Gurgaon	Active	01/30/2023	Test Admin
Republic Day	01/26/2023	HCP	India	Hyderabad	Active	01/30/2023	Test Admin
Republic Day	01/26/2023	HCP	India	Noida	Active	01/30/2023	Test Admin
Holi	03/04/2023	HCP	India	Gurgaon	Active	01/30/2023	Test Admin
Holi	03/08/2023	HCP	India	Noida	Active	01/30/2023	Test Admin

On this screen admin can see some details related to a holiday like the occasion, 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.

Market: Select Location: Select Sub Location: Select Status: Active X Clear Filters

Clear Filters Button

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 based on different filters namely
  - a. Market
  - b. Location
  - c. Sub Location
  - d. Status
3. Admin can also search a holiday.
4. Adding Holiday detail
5. Updating Holiday details

### Steps to add a Holiday

[+ Add Holiday](#) Add new Holiday from here

**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.

Add New Holiday

Occasion\* Republic Day

Holiday Date\* 01/26/2023

Market\* HCP

Location\* India

Sub Location\* Gurgaon

Holiday required fields

Reset Add

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	01/01/2023	HCP	US	California	Active	01/30/2023	Test Admin
Martin Luther King Jr. ...	01/16/2023	HCP	US	California	Active	01/30/2023	Test Admin
Republic Day	01/26/2023	HCP	India	Bangalore	Active	01/30/2023	Test Admin
Republic Day	01/26/2023	HCP	India	Chennai	Active	01/30/2023	Test Admin
Republic Day	01/26/2023	HCP	India	Gurgaon	Active	01/30/2023	Test Admin

Newly Added Holiday

### Steps to update a Holiday

**Step 1:** Admin double clicks the record he intends to update, then following form opens-up with required fields.

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



## User Manual

Update Holiday

Occasion\*

Republic Day

Holiday Date\*

01/26/2023

✕

📅

Market\*

NAMM

▼

Location\*

India

▼

Sub Location\*

Chennai

▼

Status

Active

▼

Update

Delete

Holiday required fields

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

Optum

Capacity Planning Tool

Holiday Details

Master | Holiday Details

Market

Select

▼

Location

Select

▼

Sub Location

Select

▼

Status

Active

✕

▼

Clear Filters

Columns

Download

Search

✕

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

Updated Holiday

Alert on Update

Help

Test Admin

✕

✓

Holiday Updated Successfully

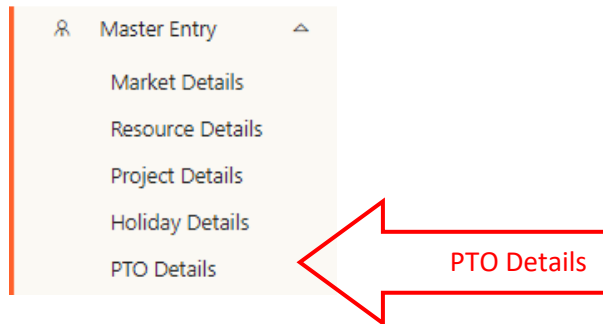
✕

+ Add Holiday

## User Manual

## PTO Details

This screen provides an interface from where admin can monitor and manage the PTOs for the resources. Here, admins can see the resources who have taken PTOs with their relevant details like the start date, end date, month, PTO types, and number of days of the PTO taken etc.

*Accessing the PTO Details Screen*

To access PTO Details admin selects PTO Details dropdown under Master Entry of the sidebar, then it navigates to the following screen.

### PTO Details

Master | PTO Details + Add PTO

Resource Manager PTO Type Month Year Status

Select Select Select Select Select Active X Clear Filters

Columns Download

Search X

Resource	Resource Manager	PTO Type	Start Date	End Date	Number of Days	Status	Created Date	Created By
Paul Kieu	Ashish Khare	PTO	05/04/2023	05/26/2023	17	Active	05/31/2023	Test Admin
Lestlie Kiheri	Vipul Suri	PTO	05/05/2023	05/11/2023	5	Active	05/31/2023	Test Admin
Sreedevi Akula	Sivaruban Vinesparam...	PTO	05/02/2023	05/03/2023	2	Active	05/31/2023	Test Admin
Uday Kumar Keesara	Ashish Khare	PTO	05/04/2023	05/05/2023	2	Active	05/31/2023	Test Admin
Oscar Pena	Vipul Suri	PTO	05/03/2023	05/11/2023	2	Active	05/31/2023	Test Admin
Bhavin Thakkar	Sivaruban Vinesparam...	PTO	05/11/2023	05/16/2023	4	Active	05/31/2023	Test Admin
Aruna Jyothi Poojari	Sivaruban Vinesparam...	PTO	05/10/2023	05/11/2023	2	Active	05/31/2023	Test Admin
Mohan Ganesh	Ashish Khare	PTO	05/03/2023	05/08/2023	4	Active	05/31/2023	Test Admin

Here also, we have search and filter functionality and by using them we can filter these details as per our requirement and we can export filtered records in pdf or excel format. For filtering columns, we must select the columns from the column's dropdown.

*Steps to add a PTO*

**Step 1:** To add a new resource's PTO admin clicks on the "+ Add PTO" button available on the top right just below the profile icon. And it opens the following form with the fields for a PTO.

## User Manual

**Add New PTO**

Resource\*  
Anuj Khanna

Manager  
Vipul Suri

PTO Start Date\*  
05/04/2023

PTO End Date\*  
05/19/2023

Month\*  
May

Year\*  
2023

PTO Type\*  
Casual

No. Of Days\*  
12

Remarks

*\*Note: PTO Start Date and PTO End Date should be same.*

☐ Half Day

Reset Add

PTO details fields

For valid filled in details PTO would be added successfully, admin get a notification and the newly added PTO can be seen on the PTO details screen.

Resource ▲	Resource Manager	PTO Type	Start Date	End Date	Number of Days	Status	Created Date	Created By
Alexander Rozenbaum	Vipul Suri	PTO	01/05/2023	01/06/2023	2	Active	08/09/2023	Leslie Kiheri
Alexander Rozenbaum	Vipul Suri	PTO	02/06/2023	02/12/2023	6	Active	08/09/2023	Leslie Kiheri
Anuj Khanna	Vipul Suri	Casual	05/04/2023	05/19/2023	12	Active	08/30/2023	Test Admin
Deepti Perla	Ashish Khare	PTO	04/03/2023	04/12/2023	8	Active	04/03/2023	Test Admin
Deepti Perla	Ashish Khare	PTO	03/06/2023	03/06/2023	1	Active	08/11/2023	Leslie Kiheri

Newly added PTO

### Steps to update a PTO

**Step 1:** Admin double clicks the record he intends to update, then following form opens-up with required fields.

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

**Update PTO**

Resource  
Uday Kumar Keesara

Manager  
Ashish Khare

PTO Start Date\*  
05/04/2023

PTO End Date\*  
05/05/2023

Month\*  
May

Year\*  
2023

PTO Type\*  
PTO

No. Of Days\*  
2

Remarks  
NA

*\*Note: PTO Start Date and PTO End Date should be same.*

☐ Half Day

Status  
Active

Update Delete

PTO details fields

For valid filled in details PTO would be updated successfully, admin get a notification and updated PTO can be seen on the PTO details screen.

User Manual

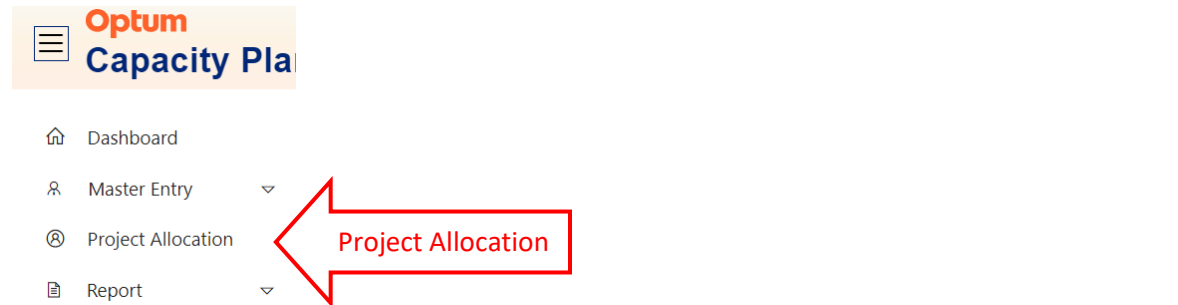
Resource	Resource Manager	PTO Type	Start Date	End Date	Number of Days	Remarks	Status	Created Date	Created By
Paul Kieu	Ashish Khare	PTO	05/04/2023	05/26/2023	17	Privilege	Active	05/31/2023	Test Admin
Leslie Kiheri	Vipul Suri	PTO	05/05/2023	05/11/2023	5	Casual	Active	05/31/2023	Test Admin
<del>Sreedevi Akula</del>	<del>Srinubha Vinodhar</del>	<del>PTO</del>	<del>05/02/2023</del>	<del>05/02/2023</del>	<del>2</del>	<del>Sick Leave</del>	<del>Active</del>	<del>05/31/2023</del>	<del>Test Admin</del>
Uday Kumar Keesara	Ashish Khare	PTO	05/04/2023	05/05/2023	2	NA	Active	05/31/2023	Test Admin

Updated PTO

## User Manual

## Project Allocation

This screen provides capability to see and manage resources' allocated hours and other project related details. Whenever a resource is aligned to a project then an admin can allocate the project by providing the resource name, project name, start date, end date and the percentage of the allocation for the project. And based on resource name and selected dates PTOs and other fields would be calculated and auto populated.



To access the Project Allocation Screen, admin must click on the Project Allocation button from the sidebar and then admin gets navigated to the following screen

### Project Allocation

+ Allocate New Project

Resource: Select, Resource Type: Select, Role: Select, Supervisor: Select, Location: Select, Resource Market: Select, Status: Active X

Clear Filters Y, More Filters Y

Columns, Download

Resource	Resource Type	Role	Supervisor	Location	Resource Market
Ajay Singh	OGA	Developer	Ashish Khare	India	HCP
Akshay Madan	GTM	Developer	Vipul Suri	US	HCP
Alexander Rozenbaum	GTM	Developer	Vipul Suri	US	HCP
Amarendra Bojja	GTM	QA	Sivaruban Vinesparamoorthy	US	HCP
Amit Singh Chauhan	OGA	Developer	Ashish Khare	India	HCP
Anand Pachipala	OGA	Developer	Ashish Khare	India	HCP
Anant Toshniwal	OGA	Developer	Ashish Khare	India	HCP
Andrey Zagaynov	GTM	Developer	Vipul Suri	US	HCP
Anindita Talukdar	OGA	Developer	Ashish Khare	India	HCP
Ankur Gupta	OGA	QA	Sivaruban Vinesparamoorthy	India	HCP

On this screen details like resource, resource type, role, supervisor, location, market can be seen by the admin. Once a row is clicked, it would expand and open all the projects that a resource is aligned to. As it is visible in following screen

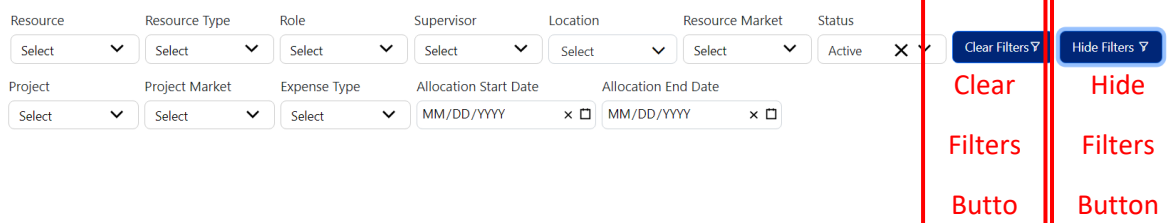
▼	Alexander Rozenbaum	GTM	Developer	Vipul Suri	US	HCP					
Project Name ▲		Project Code	Project Market	Project Manager	Expense Type						
▼	GitHub	33333	HCP		CAPEX						
Start Date ▼	End Date	Project Role	PTO Days	Holidays	Allocation(H...	Allocation P...	Status	Created Date	Created By	Updated Date	Updated By
09/01/2023	09/30/2023	Developer	0	1	112	70	Active	07/18/2023	Test Admin		
08/01/2023	08/31/2023	Developer	0	0	128.8	70	Active	07/18/2023	Test Admin		
07/01/2023	07/31/2023	Developer	0	1	112	70	Active	07/18/2023	Test Admin		
06/01/2023	06/30/2023	Developer	0	0	123.2	70	Active	07/18/2023	Test Admin		

Allocated Projects

## User Manual

And now once a project is clicked, all allocations corresponding to a particular resource and project opens and to modify the details related to an allocation admin has to double click on allocation that he must edit.

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.



Resource	Resource Type	Role	Supervisor	Location	Resource Market	Status
Select ▼	Select ▼	Select ▼	Select ▼	Select ▼	Select ▼	Active X ▼

Project	Project Market	Expense Type	Allocation Start Date	Allocation End Date
Select ▼	Select ▼	Select ▼	MM/DD/YYYY x □	MM/DD/YYYY x □

Clear Filters ▼

Clear Filters Button

Hide Filters ▼

Hide Filters Button

We can cancel all the applied filters using the clear filter button and more filters button exposes some more filters as shown below.



Project	Project Market	Expense Type	Allocation Start Date	Allocation End Date
Select ▼	Select ▼	Select ▼	MM/DD/YYYY x □	MM/DD/YYYY x □

### Download Selected Columns



Columns

Select columns to export

We have a column dropdown on this screen that has already selected selection 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 exported.

### 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,



+ Allocate New Project

Allocate new project from here

then following form opens-up with required fields.

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

## User Manual

Allocate New Project

Resource\*

Anant Toshniwal

Resource Type

OGA

Role

Developer

Supervisor

Ashish Khare

Location

India

Resource Market

HCP

Project\*

KLO CapRev

Project Role\*

Developer

Project Market

HCP

PPSID

PRJ0010012

Expense Type

OPEX

Allocation Start Date\*

04/01/2023

Allocation End Date\*

04/30/2023

Holidays

0

PTO Days

100

Allocation(Percentage) Allocated : 100\*

100

Allocation Hours Per Day

8.3

Allocation(Hours)\*

Reset

Allocate

Required details for  
allocating a new Project

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

▼	Anant Toshniwal	OGA	Developer	Ashish Khare	India	HCP					
Project Name ▲		Project Code		Project Market		Project Manager		Expense Type			
➤ KLO Application Support		PRJ0010012		HCP				OPEX			
▼ KLO CapRev		PRJ0010012		HCP				OPEX			
Start Date ▼	End Date	Project Role	PTO Days	Holidays	Allocation(H...	Allocation P...	Status	Created Date	Created By	Updated Date	Updated By
09/01/2023	09/30/2023	Developer	0	1	179	100	Active	07/11/2023	Test Admin		
08/01/2023	08/31/2023	Developer	0	1	187	100	Active	07/11/2023	Test Admin		
07/01/2023	07/31/2023	Developer	0	0	179	100	Active	07/11/2023	Test Admin		
06/01/2023	06/30/2023	Developer	0	1	179	100	Active	07/11/2023	Test Admin		
05/01/2023	05/31/2023	Developer	0	0	168	100	Active	05/01/2023	Test Admin		
04/01/2023	04/30/2023	Developer	0	0	168	100	Active	04/01/2023	Test Admin		

Newly Allocated Project

Newly Allocated Project

### Steps for updating an allocation

**Step 1:** Admin clicks on the resource for whom allocation is to be edited and then following form opens-up

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

## User Manual

Update Allocation

Resource\*

Anuj Khanna

Resource Type

GTM

Role

Developer

Supervisor

Vipul Suri

Location

US

Resource Market

HCP

Project\*

CURO Medical Management Imp...

Project Role\*

Developer

Project Market

HCP

PPSID

PRJ0010052

Expense Type

CAPEX

Allocation Start Date\*

02/01/2023

Allocation End Date\*

02/28/2023

Holidays

0

PTO Days

0

Allocation(Percentage) Allocated : 200\*

10

Allocation Hours Per Day

4

Allocation(Hours)\*

8

Status

Active

Update

Delete

Required details for an allocation

After successful update, admin gets alert and the resource on an updated project and date can be seen on the project allocation screen as in the following screen.

▼	Anuj Khanna	GTM	Developer	Vipul Suri	US	HCP						
Project Name ▲		Project Code		Project Market		Project Manager		Expense Type				
▼	CURO Medical Management Implementa...	PRJ0010052		HCP				CAPEX				
Start Date ▼	End Date	Project Role	PTO Days	Holidays	Allocation(H...	Allocation P...	Status	Created Date	Created By	Updated Date	Updated By	
04/01/2023	04/30/2023	Developer	10	0	8	10	Active	04/01/2023	Test Admin	06/01/2023	Test Admin	
03/01/2023	03/31/2023	Developer	0	0	8.8	10	Active	07/12/2023	Leslie Kihari	08/30/2023	Test Admin	
02/01/2023	02/28/2023	Developer	0	0	8	10	Active	07/12/2023	Leslie Kihari	08/30/2023	Test Admin	
01/01/2023	01/31/2023	Developer	0	1	8.8	10	Active	01/27/2023	Test Admin	08/30/2023	Test Admin	

Updated Project

## Allocation (Percentage)

Allocation(Percentage)

Allocated : 200\*

Allocated percentage

100

We have this control that indicates the percentage of allocation hours that have already been allocated for some other project for the selected resource 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 resource, 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



## User Manual

Allocation Hours Per Day	Hours for that a
8.5	Resource can be allocated

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

**Allocation Hours Calculation**

Allocation(Hours)*	Allocation hours
98	

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

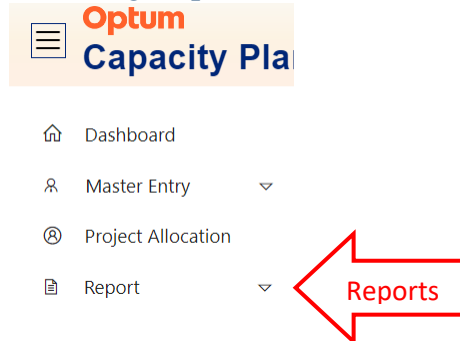
$$\text{Allocation hours} = \text{total working days} * \text{allocation hours per day} * \text{allocation percentage}$$

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 based on different set of data available on the database.

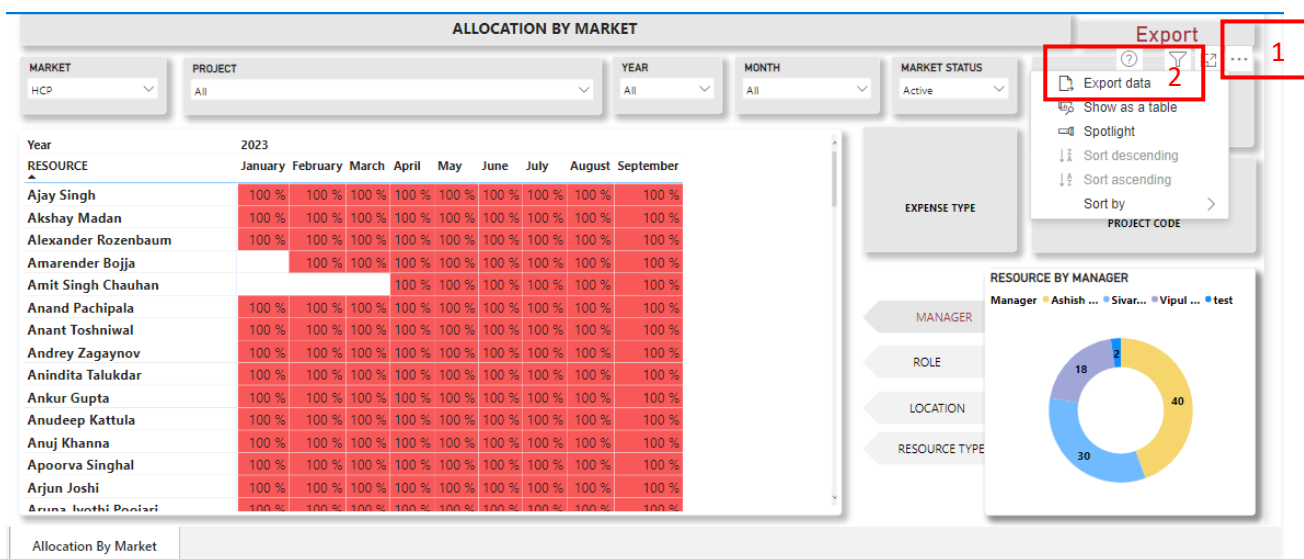
### Accessing Reports Screen



To access this set of screens admin/user must 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 it is provided with dropdowns for selecting year, months, and market status to filter the report according to year, month, and Market Status.



**Export Report** - To export the data to excel one must follow 4 steps

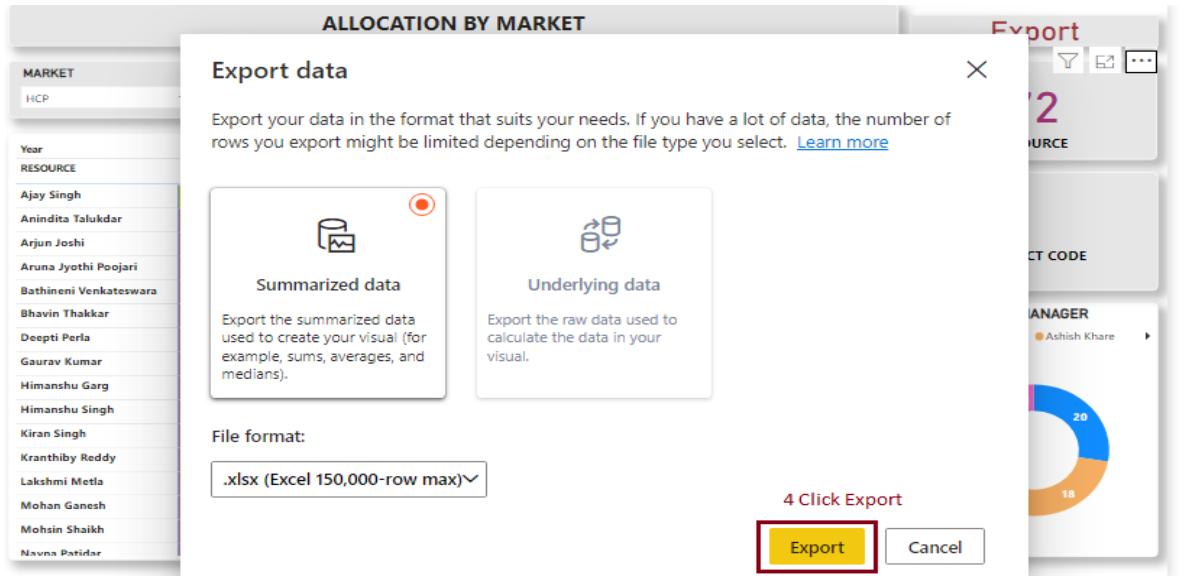
**Step 1:** Hover over the “Export visual”

**Step 2:** Click on more options represented with 3 dots (...)

**Step 3:** Select “Export data”

## User Manual

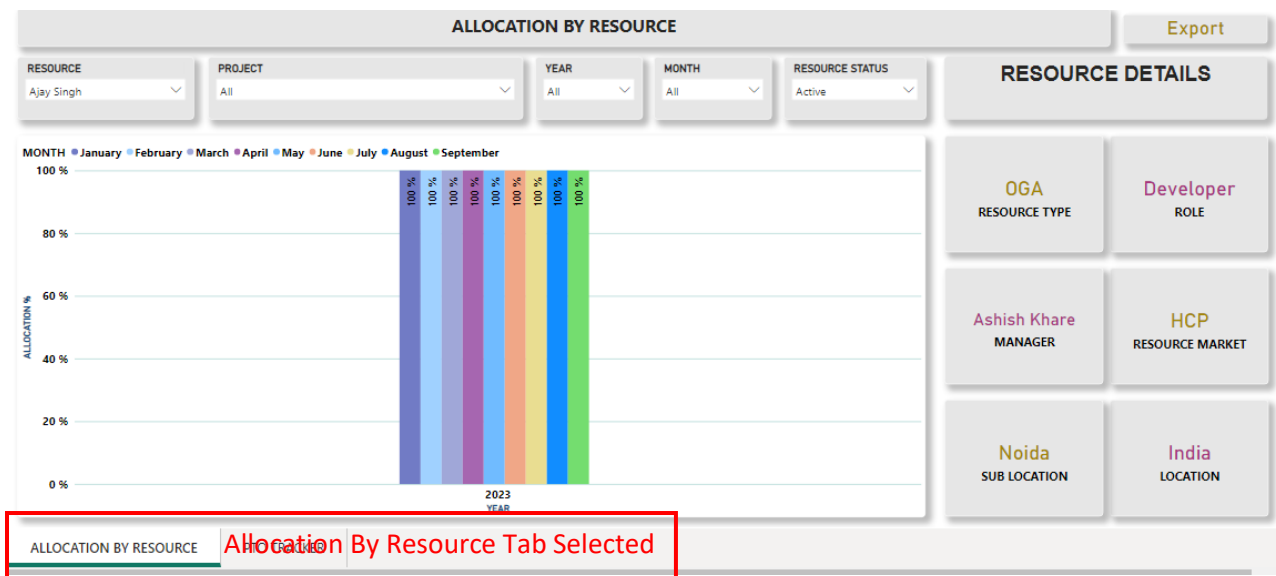
**Step 4:** A new visual box will appear and just click “Export” button. The excel file will be downloaded to your system.



### Allocation By Resource & PTO Tracker

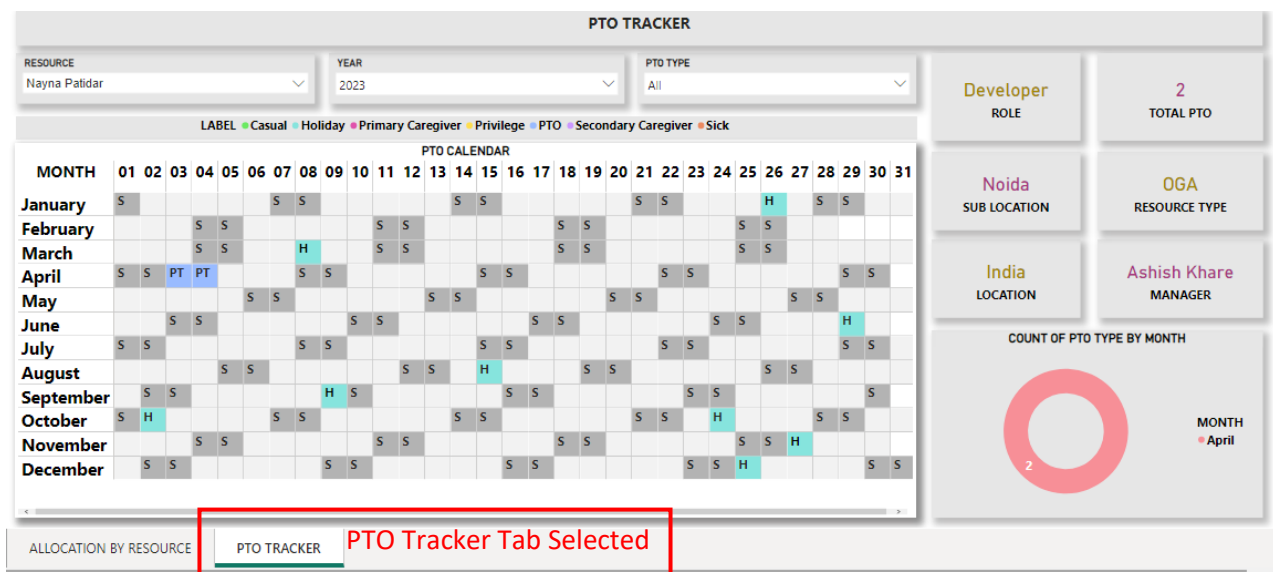
This Report contains 2 tabs which is present at the bottom of the report. One contains the Allocation By Resource and other one contains the PTO details for all the resources.

**Allocation By Resource Tab** 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. The Export functionality for downloading excel file is also provided in this report as well. The steps are like Allocation by Market.



## User Manual

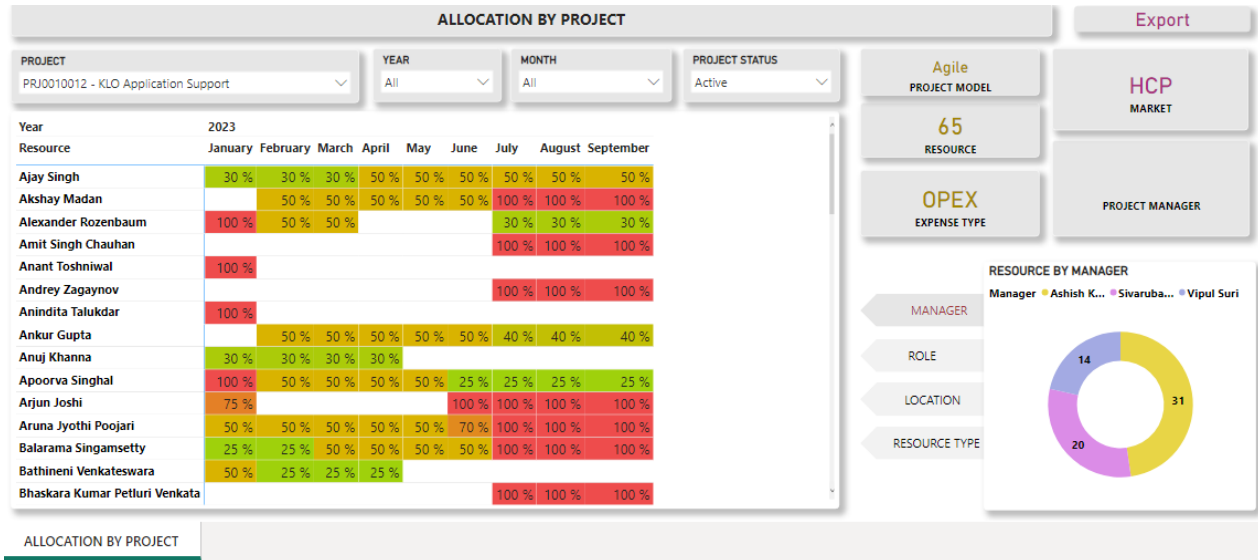
**PTO Tracker Tab** contains the three dropdowns namely the Resource, Year and PTO Type. On the right-hand side of the report, there is detail related to the resource and the Total PTO card for displaying the total PTO taken in this year by a particular resource. At the bottom right corner, there is one visual for counting PTO Type by month which will tell what the months in which PTO are taken and what is the PTO Type for that. At the bottom left corner, the PTO Calendar is there. Months are on the row side and the days of month are on the column side. The PTO are represented with different colors depending upon the PTO Type. At the top of PTO Calendar, the notation of PTO Type with different colors are shown. Also, the PTO Types are represented in abbreviated form in the PTO Calendar. Casual leave is represented with 'C', Privilege leave is represented with 'P', Sick leave is represented with 'SL', Primary Caregiver is represented with 'PC' and Secondary Caregiver is represented with 'SC'.



## 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 based on year and months.

## 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 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.

**HOLIDAY LIST**

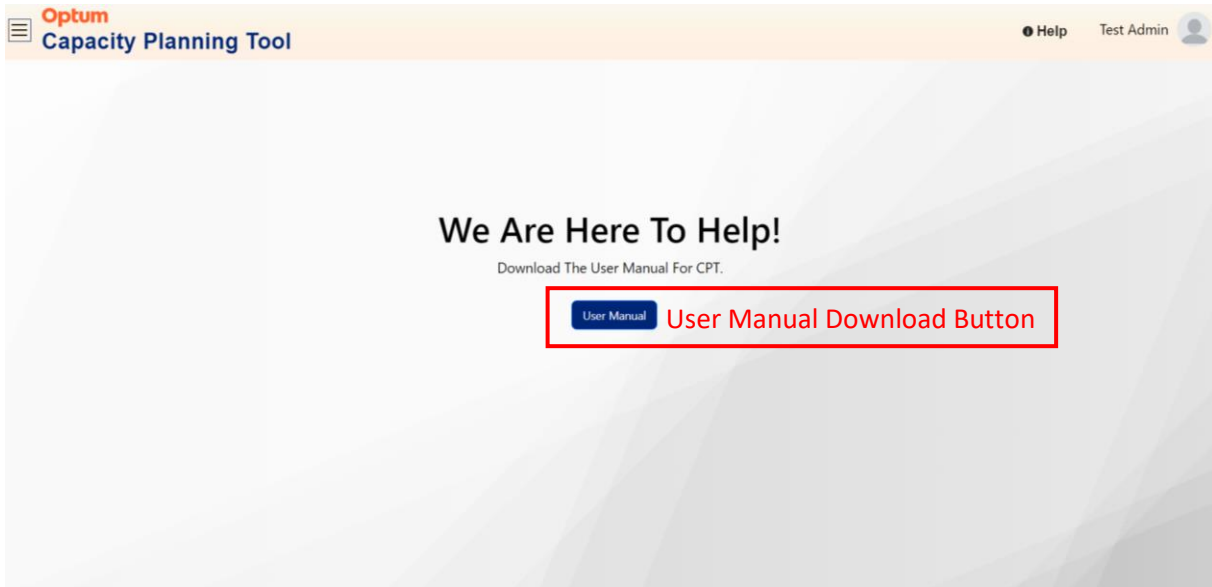
MARKET: All | COUNTRY: India | STATE: All

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

Filters: Search | Filters on this page: HolidayDate - Year is (All)

## 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.

