# MAXIMUS

# MAXDAT Production Planning

# Current and Future Requirements

# 23-May-2013

As-Is Features

1. Ability to load production plan data from Arena output (csv file) using a manual multi-step process using SQL Loader, SQL Developer/Plus, and Savvion to load data to a database where “actuals” are calculated for reporting.
2. Ability to view production plan data in a report during load process.
3. Production plan is required to be reviewed and approved before it is activated.
4. Ability to change production plan forecasts through Savvion UI or by manually loading plan data.
5. Support to load daily forecast data for:
   1. Intake by date by unit of work
   2. Completions by date by unit of work
   3. Inventory by date by unit of work by age in days
   4. Staff Hours to Assign by date by unit of work
6. During load of daily forecast data, the system calculates the average age of inventory and forecast jeopardy inventory for each date. Business rules for jeopardy and average age are embedded within the ETL code.
7. Actual Counts and Percent Deviation are calculated and updated hourly for the current plan period.
   1. Actual Intake by date by unit of work
   2. Actual Completions by date by unit of work
   3. Actual Inventory by date by unit of work
   4. Actual Inventory Average Age by date by unit of work
   5. Percent Deviation Intake
   6. Percent Deviation Completions
   7. Percent Deviation Inventory
8. Attributes required for reporting:
   1. Project
   2. Program
   3. Region
   4. Production Plan Name
   5. Unit of Work
   6. Plan Start Date Text
   7. Plan End Date Text
   8. Plan Date DtH
   9. Plan Date Text
   10. Day of Plan
   11. Current Plan Flag
   12. This Week Flag
   13. Today Flag
   14. Yesterday Flag
   15. Process Status
9. Metrics required for reporting:
   1. Fcst Arrv Vol
   2. FcstArrvVolSum
   3. Fcst Inv Vol
   4. Fcst Inv Jprdy Vol
   5. Fcst Cmplt Vol
   6. FcstCmpltVolSum
   7. Fcst Inv Avg Age
   8. Act Arrv Vol
   9. ActCmpltVolSum
   10. ActArrvVolSum
   11. Act Inv Vol
   12. Act Inv Avg Age
   13. Act Cmplt Vol
   14. Act Inv Jprdy Vol
   15. PctDev Cmplt Vol
   16. PctDevArrvVolSum
   17. PctDev Inv Vol
   18. PctDev Inv Avg Age
   19. PctDevInvJprdyVol
   20. PctDev Arrv Vol
   21. PctDevCmpltVolSum
   22. StaffHrsReassigned
   23. Hours of Staff to Assign

To-Be Features

1. Ability to manually load production plan data to using a simple (requiring no more than 30 minutes of training) 1-2 step process from Arena output (csv file) to database where “actuals” data is stored for reporting.
2. Ability to load data from any source that has been inserted to standardized staging tables. This enables push of actual data from external systems, event processors, etc.
3. Ability to update plan data for all or part of a plan period by following the same steps as #1 or #2 above for the plan and without affecting actuals already calculated for the production plan.
4. Ability to join on date and/or date and hour-of-day and unit of work to actuals data.
5. Grain per unit of work will be either hourly or daily for both forecast and actuals. Grain may vary for different units of work within the same plan and period but will be consistent within a single unit of work. For example, a unit-of-work will not contain a forecast by hour for one week and by date for another week.
6. Ability to drill in to details on actuals data within a single unit-of-work. Drilling to individual record details will be configured per-report and limited to reports for a specific unit of work where detail data is available.
7. Actual Counts and metric values will be calculated and updated on a schedule to be configurable by plan and unit-of-work.
8. Identifiers will be captured for actual counts to enable drilling to details within reports.
9. Calculations for actual inventory metrics will be performed only for the current day and hour (if applicable).
   1. Actual Inventory by date and hour by unit of work
   2. Actual Inventory Average Age by date and hour by unit of work
   3. Actual Inventory Min Age by date and hour by unit of work
   4. Actual Inventory Max Age by date and hour by unit of work
   5. Actual Inventory Mean Age by date and hour by unit of work
   6. Actual Inventory Median Age by date and hour by unit of work
   7. Actual Inventory Standard Deviation Age by date and hour by unit of work
   8. Actual Inventory Jeopardy by date and hour by unit of work
   9. Percent Deviation Inventory Average Age by date and hour by unit of work
   10. Percent Deviation Inventory Min Age by date and hour by unit of work
   11. Percent Deviation Inventory Max Age by date and hour by unit of work
   12. Percent Deviation Inventory Mean Age by date and hour by unit of work
   13. Percent Deviation Inventory Median Age by date and hour by unit of work
   14. Percent Deviation Inventory Standard Deviation Age by date and hour by unit of work
10. During load of daily forecast data, the system will calculate the average age of inventory and forecast jeopardy inventory for each date. Business rules for jeopardy and average age will be easily configurable.
11. Actual Intake, Completions, Staff Hours Assigned, and AHT will be calculated and updated hourly for 7 days following the plan date.
    1. Actual Intake by date and hour by unit of work
    2. Actual Completions by date and hour by unit of work
    3. Actual Staff Hours Assigned by date and hour by unit of work
    4. Actual Average Handle Time by date and hour by unit of work
    5. Actual Min Handle Time by date and hour by unit of work
    6. Actual Max Handle Time by date and hour by unit of work
    7. Actual Mean Handle Time by date and hour by unit of work
    8. Actual Median Handle Time by date and hour by unit of work
    9. Actual Standard Deviation Handle Time by date and hour by unit of work
    10. Percent Deviation Intake by date and hour by unit of work
    11. Percent Deviation Completions by date and hour by unit of work
    12. Percent Deviation Staff Hours Assigned by date and hour by unit of work
    13. Percent Deviation Average Handle Time by date and hour by unit of work
    14. Percent Deviation Handle Time Min Age by date and hour by unit of work
    15. Percent Deviation Handle Time Max Age by date and hour by unit of work
    16. Percent Deviation Handle Time Mean Age by date and hour by unit of work
    17. Percent Deviation Handle Time Median Age by date and hour by unit of work
    18. Percent Deviation Handle Time Standard Deviation Age by date and hour by unit of work
12. Ability to manually load actuals from a formatted text file (csv)
13. Ability to process and load actuals from defined standard staging area. This enables push of actual data from external systems, event processors, etc.
14. Attributes Required for Reporting
    1. Region
    2. Project
    3. Program
    4. Production Plan Name
    5. Plan Start Date
    6. Plan Start Hour
    7. Plan End Date
    8. Plan End Hour
    9. Forecast Last Modified Date
    10. Plan Creation Date
    11. Unit of Work Name
    12. AHT Time Unit
    13. Plan Date
    14. Plan Hour
15. Metrics Required for Reporting
    1. Forecast Arrival
    2. Forecast Offered
    3. Forecast Completion
    4. Forecast Abandoned
    5. Forecast Inventory
    6. Forecast Inventory Average Age
    7. Forecast Inventory Jeopardy
    8. Forecast Average Time to Claim
    9. Forecast Average Handle Time
    10. Forecast Staff Hours
    11. Actual Arrival
    12. Actual Offered
    13. Actual Completion
    14. Actual Abandoned
    15. Actual Inventory
    16. Actual Inventory Average Age
    17. Actual Inventory Jeopardy
    18. Actual Average Time to Claim
    19. Actual Average Handle Time
    20. Actual Staff Hours
    21. Percent Deviation Arrival
    22. Percent Deviation Offered
    23. Percent Deviation Completion
    24. Percent Deviation Abandoned
    25. Percent Deviation Inventory
    26. Percent Deviation Inventory Average Age
    27. Percent Deviation Inventory Jeopardy
    28. Percent Deviation Average Time to Claim
    29. Percent Deviation Average Handle Time
    30. Percent Deviation Staff Hours