

TDLPro

USER GUIDE

Version 1.1 | Oct 15, 2018

Contents

1	TDLPRO.....	4
1.1	OVERVIEW.....	4
2	ROLES.....	4
3	NAVIGATION.....	4
3.1	LOGIN.....	4
3.2	SIDE NAVIGATION BAR.....	5
3.2.1	PMO role.....	5
3.2.2	PM ROLE.....	6
3.2.3	TEAM MEMBER.....	6
3.3	TOP NAVIGATION BAR.....	6
3.4	IDENTIFYING VERSION.....	6
3.5	LOGOUT.....	6
3.5.1	MANUAL LOGOUT.....	6
3.5.2	SESSION TIMEOUT.....	7
4	USERS.....	7
4.1	CREATE A NEW USER.....	7
4.2	EDIT AN EXISTING USER.....	9
4.3	DELETE AN EXISTING USER.....	10
4.4	MODIFY USER PASSWORD.....	11
4.5	USER REPORT.....	11
4.5.1	ALL USERS.....	11
4.5.2	MISSING USERS.....	11
5	RESOURCES.....	11
5.1	CREATE A NEW RESOURCE.....	11
5.2	EDIT AN EXISTING RESOURCE.....	14
5.3	DELETE A RESOURCE.....	15
5.4	CREATE/MODIFY A NEW LABOR CATEGORY.....	16
6	TDL.....	16
6.1	CREATE A NEW TDL.....	16
6.2	EDIT AN EXISTING TDL.....	18

6.3	DELETE A TDL	19
6.4	SEARCH FOR TDL.....	20
6.4.1	Search Filter	21
6.5	KANBAN BOARD	21
7	RESOURCE ALLOCATION.....	22
7.1	ADD RESOURCES TO TDL.....	22
7.1.1	Add a single resource.....	22
7.1.2	Add multiple resources	23
7.1.3	Swap a resource	23
7.2	EDIT BUDGETED HOURS.....	25
7.3	ADD WEEKLY PLAN RESOURCE HOURS.....	26
7.4	ADD DAILY PLAN RESOURCE HOURS	29
7.5	EDIT PLANNED HOURS	30
8	PLAN SHEET	31
8.1	REVIEW PLANNED HOURS	31
8.2	SEND CHARGE AUTHORIZATION EMAIL	32
8.3	REVIEW FORECAST HOURS.....	33
8.4	EXPORT BREAKDOWN.....	34
8.5	EXPORT CLIN REPORT	34
9	TIME SHEET.....	35
9.1	CONTRACTORS TIME ENTRY.....	35
9.2	DTE IMPORT.....	35
9.3	REVIEW ACTUAL HOURS	36
9.4	EXPORT BREAKDOWN.....	37
9.5	EXPORT CLIN REPORT	37
10	REPORTS.....	37
10.1	VARIANCE REPORT	37
10.2	PLAN VS ACTUAL.....	37
11	SKILLS MATRIX	37
11.1	ENTER RESOURCE SKILLS	37
11.2	REVIEW SKILLS MATRIX.....	37

1 TDLPRO

1.1 OVERVIEW

TDLPRO is a forecasting, planning and tracking application specifically designed for the Deloitte CBER CSOM team to manage their resources efficiently.

This document serves as the user guide for TDLPro.

2 ROLES

There are 4 user roles defined in TDLPRO. They are

Team Member	<ul style="list-style-type: none">• Review Planned Hours• Contractors enter actual hours• Update Skills
Project Manager	<ul style="list-style-type: none">• Create TDL, Users, Resources• Review Project Financials• Edit/Delete Hours/Cost
PMO	<ul style="list-style-type: none">• Create TDL, Users, Resources• Review/Report Financials• Modify Hours/Cost On Any Project• Import DTE• Export Raw Data
Administrator	<ul style="list-style-type: none">• Administrative privileges

3 NAVIGATION

3.1 LOGIN

TDLPro User is assigned a username, password and a user role by either the Administrator or the PMO team member. Username and password are emailed to individual team members.

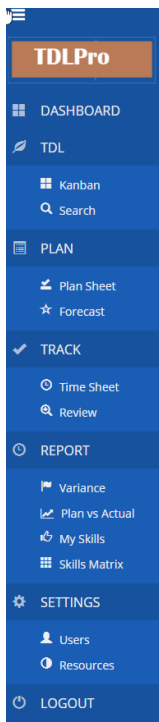


1. User enters the username and password and click <Login> button to enter the TDLPro application

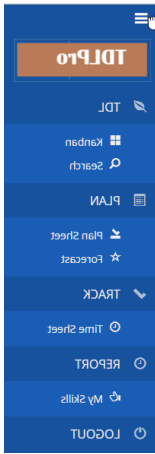
3.2 SIDE NAVIGATION BAR

Depending on the user role assigned, the user would see a different side navigation menu bar on the left side after logging to the application.

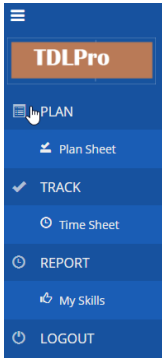
3.2.1 PMO role



3.2.2 PM ROLE

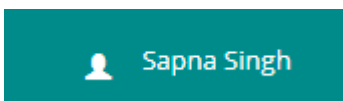


3.2.3 TEAM MEMBER



3.3 TOP NAVIGATION BAR

Logged in user full name is displayed on the top navigation bar.



3.4 IDENTIFYING VERSION

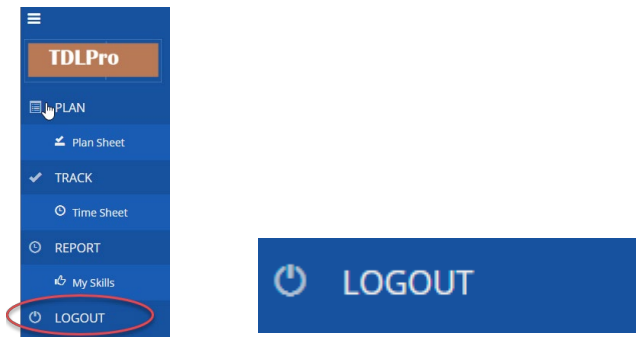
TDLPro version and the last updated date can be identified on the login screen.



3.5 LOGOUT

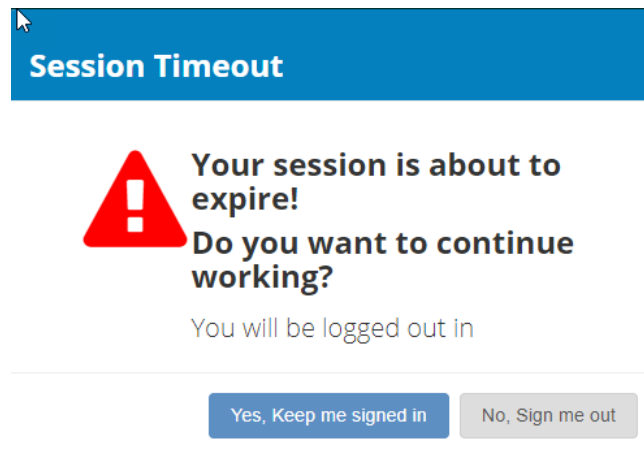
3.5.1 MANUAL LOGOUT

User can log out of the application by clicking <Logout> navigation item on the side navigation bar.



3.5.2 SESSION TIMEOUT

After certain minutes of inactivity, the system provides a warning about the session time out and user must save entries during that window period. Once timed out, all information that is unsaved is lost.



Notes: This feature needs more testing

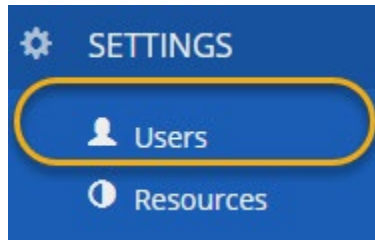
4 USERS

Users are created to allow logging into TDLPro.

4.1 CREATE A NEW USER

Only a PMO role member can create a new user.

1. On the side navigation bar, select <Users>



2. A new report will all system users appear

Download Report Missing Users **+ Add User**

	FIRST NAME	LAST NAME	LOGIN ID	ROLE	STATUS	
	<input type="text"/>	<input type="text"/>				
	Nazia	Abbas	nabbas	Project Manager	Active	
	admin	admin	admin	Administrator	Active	
	Kaushik	Adya	kadya	Team Member	Active	
	Anand	Alagappa	aalagappa	Team Member	Active	
	Prianka	Alam	palam	Team Member	Active	
	Gregory	Allen	gallen	Team Member	Active	
	Vineeth	Annamreddy	vineeth	Team Member	Active	
	Raghu	Bala	rbala	Team Member	Active	
	Sagar	Barija	sbarija	Team Member	Active	
	Demetrius	Brown	dbrown	Team Member	Active	
	Jorge	Carvallo Ortiz,	jorge	Team Member	Active	
	Mike	Corey,	mcorey	Team Member	Active	
	Cheryl	Corman	ccorman	Team Member	Active	

3. Click <Add User> button on the top right of the screen.

Add User

Role Required

First Name Required

Last Name Required

User ID Required

Password Required

Employee ID Required

Enabled ☐

Save User Cancel

4. Enter the following information
 - a. Role: Select one of the 4 roles for the user. See section 2 for details on roles
 - b. First Name: Enter first name of the user
 - c. Last Name: Enter last name of the user
 - d. User ID: Enter login user name for the user. Preference: (all lower case: start with first letter of the first name followed by the last name)
 - e. Password: Enter initial password for the user
 - f. Employee ID: A unique 6 digit employee ID. (Note employee id entered here should match the employee ID entered in Resource screen)
 - g. Enabled: Select this to make the user active.
5. Click <Save User> button to save the user information.
6. If any of the required field is not entered, the system will not allow you to save and will prompt you for missing information.
7. Click <Cancel> if you no longer want to save the new user information.
8. Once the user is created, please verify the new user in the report screen show in step 2.

4.2 EDIT AN EXISTING USER

Only a PMO role member can edit an existing user.

1. On the side navigation bar, select <Users>
2. A new report will all system users appear

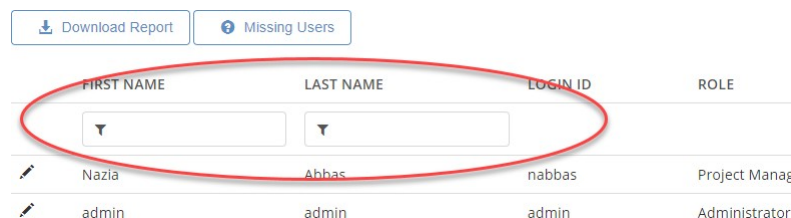
Download Report

Missing Users

Add User

FIRST NAME	LAST NAME	LOGIN ID	ROLE	STATUS	
<input type="text" value="T"/>	<input type="text" value="T"/>				
	Nazla	Abbas	nabbas	Project Manager	Active
	admin	admin	admin	Administrator	Active
	Kaushik	Adya	kadya	Team Member	Active
	Anand	Alagappa	aalagappa	Team Member	Active
	Prianka	Alam	palam	Team Member	Active
	Gregory	Allen	gallen	Team Member	Active
	Vineeth	Annamreddy	vineeth	Team Member	Active
	Raghu	Bala	rbala	Team Member	Active
	Sagar	Barija	sbarija	Team Member	Active
	Demetrius	Brown	dbrown	Team Member	Active
	Jorge	Carvallo Ortiz,	jorge	Team Member	Active
	Mike	Corey,	mcorey	Team Member	Active
	Cheryl	Corman	ccorman	Team Member	Active

3. Search for an existing user by navigating through the pages or by entering the first name or last name in the filter screen.



Download Report		Missing Users				
FIRST NAME	LAST NAME	LOGIN ID	ROLE			
<input type="text"/>	<input type="text"/>					
	Nazla	Abbas	nabbas	Project Manag		
	admin	admin	admin	Administrator		

- Once the user is identified, please click the pencil icon on the report to edit an existing user.
- Modify the user information and select <Save User> button.

- Please note that Password and Employee ID fields are masked for security purpose.
(Note: Contact TDLPro technical support team if you need assistance.)

4.3 DELETE AN EXISTING USER

It is highly recommended that this feature is not used. It is recommended to edit the user and uncheck the “Enabled” checkbox if the user needs to be flagged as inactive.

- If for whatever reason, user needs to be deleted, please navigate to user reports screen and click on the delete icon.

	FIRST NAME	LAST NAME	LOGIN ID	ROLE	STATUS	
	<input type="text"/>	<input type="text"/>				
	Nazia	Abbas	nabbas	Project Manager	Active	
	admin	admin	admin	Administrator	Active	

- User will be prompted with a “Are you sure” screen.

- Click “Confirm” button to delete the user.

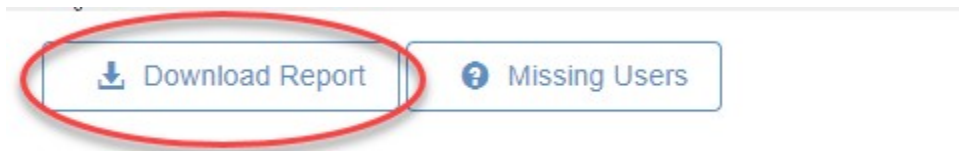
4.4 MODIFY USER PASSWORD

At present, there is not s “Reset Password” feature by the user. Only a PMO can alter the password by editing the user information. This feature is under construction.

4.5 USER REPORT

4.5.1 ALL USERS

1. Please click “Download Report” on the report screen shown by selecting “Users” on the left side navigation menu.



2. System will export all entered users to an excel spreadsheet

4.5.2 MISSING USERS

Sometimes, Project Resources are created without a corresponding system user entry. Please click “Missing Users” button on the report screen to export a list of resources for whom the user entry is either missing or mismatching.



Note: Mismatch occurs when the EmployeeID entered in user screen does not match the employeeID entered in the resource screen.

5 RESOURCES

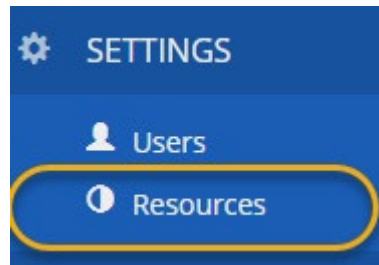
Resources are created to be added as Project Resources. Each resource is assigned a labor category and an associated rate.

Note: if a resource is billed as two different labor categories, they have to be entered as two independent resources in the system.

5.1 CREATE A NEW RESOURCE

Only a PMO role member can create a new user.

1. On the side navigation bar, select <Resources>



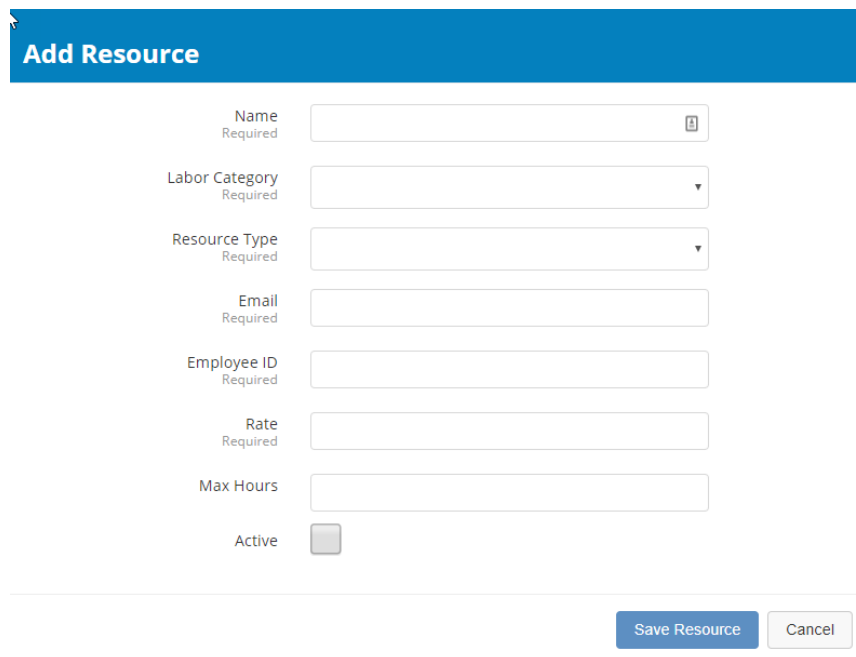
2. A new report with all project resources appear.

Resources

[Download Report](#) [+ Add Resource](#)

	NAME	LABOR CATEGORY	EMPLOYEE ID	EMAIL	
	<input type="text" value="T"/>				
	Abbas, Nazia	Sr IT Project Manager	0001	nazia.abbas@fda.hhs.gov	
	Adya, Kaushik	SME Comp Sys Eng/Architec	****3446	kaushik.adya@fda.hhs.gov	
	Alagappa, Anand	SME Comp Sys Eng/Architec	****5639	anand.alagappa@fda.hhs.gov	
	Alam, Prianka	Sr Training/Dev Spec	****4131	pralam@deloitte.com	
	Allen, Gregory	Sr Comp Sys Eng/Architect	****0141	gregory.allen@fda.hhs.gov	
	Annamreddy, Vineeth	Jr Comp Sys Eng/Arch	****6913	vineeth.annamreddy@fda.hhs.gov	
	Balasubramanian, Raghu	SME Comp Sys Eng/Architec	****2680	raghu.balasubramanian@fda.hhs.gov	
	Barija, Sagar	JM Comp Sys Eng/Arch	***RIJA	sagar.barija@fda.hhs.gov	
	Brown, Demetrius	JM Comp Usr Supp Spec	****9226	demetrius.brown@fda.hhs.gov	
	Carvallo Ortiz, Jorge	SME Comp Sys Eng/Architec	****9187	jorge.carvallo@fda.hhs.gov	
	Corau, Mike	JM Comp Programmer	****0374	michael.corau@fda.hhs.gov	

3. Click <Add Resource> button on the top right of the screen.



Add Resource

Name
Required

Labor Category
Required

Resource Type
Required

Email
Required

Employee ID
Required

Rate
Required

Max Hours

Active

Save Resource Cancel

4. Enter the following information:
 - a. Name: Enter the full display user name: <<Last Name, First Name>>. This is the Project Resource name that will be displayed in all TDLPro screens
 - b. Labor Category: Please select one of the labor category from the drop down list. (see section 5.4 for additional details on adding/modifying labor category)
 - c. Resource Type: Select one of the 3 items in the dropdown list.
 - i. Contractor (refers to subcontractors on the team). Note: When a resource is assigned this type – the user will be able to enter actual project hours in the system.
 - ii. Deloitte – Consulting (Non UDSC Deloitte resources on the team)
 - iii. Deloitte – USDC
 - d. Email: enter a valid FDA or Deloitte email address. This email address will be used for all system generated email communication.
 - a. Employee ID: A unique 6 digit employee ID. (Note employee id entered here should match the employee ID entered in User screen)
 - e. Rate: Labor Category rate is entered here
 - f. Max Hours: Resource max capacity hours entered here. (Note: system usually flags hours in red if at any time the resource is allocated more than their capacity). This feature allows the system to identify part-time resources etc.
 - g. Active: Select this checkbox to keep the resource active. (Note: If a resource leaves the time, it is recommended that this checkbox is unchecked. Most reports on TDLPro only looks at active resources)
5. Click <Save Resource> button to save the resource information.

6. If any of the required field is not entered, the system will not allow you to save and will prompt you for missing information.
7. Click <Cancel> if you no longer want to save the new resource information.
8. Once the resource is created, please verify the new resource in the report screen show in step 2.

5.2 EDIT AN EXISTING RESOURCE

Only a PMO role member can create a new user.

1. On the side navigation bar, select <Resources>
2. A new report with all project resources appear.

Resources

[Download Report](#) [+ Add Resource](#)

	NAME	LABOR CATEGORY	EMPLOYEE ID	EMAIL	
	<input type="text"/>				
	Abbas, Nazia	Sr IT Project Manager	0001	nazia.abbas@fda.hhs.gov	
	Adya, Kaushik	SME Comp Sys Eng/Architec	****3446	kaushik.adya@fda.hhs.gov	
	Alagappa, Anand	SME Comp Sys Eng/Architec	****5639	anand.alagappa@fda.hhs.gov	
	Alam, Prianka	Sr Training/Dev Spec	****4131	pralam@deloitte.com	
	Allen, Gregory	Sr Comp Sys Eng/Architect	****0141	gregory.allen@fda.hhs.gov	
	Annamreddy, Vineeth	Jr Comp Sys Eng/Arch	****6913	vineeth.annamreddy@fda.hhs.gov	
	Balasubramanian, Raghu	SME Comp Sys Eng/Architec	****2680	raghu.balasubramanian@fda.hhs.gov	
	Barija, Sagar	JM Comp Sys Eng/Arch	***RIJA	sagar.barija@fda.hhs.gov	
	Brown, Demetrius	JM Comp Usr Supp Spec	****9226	demetrius.brown@fda.hhs.gov	
	Carvallo Ortiz, Jorge	SME Comp Sys Eng/Architec	****9187	jorge.carvallo@fda.hhs.gov	
	Corau, Mike	JM Comp Programmer	****0274	michael.corau@fda.hhs.gov	

3. Search for an existing resource by navigating through the pages or by entering the partial first or last name in the filter screen.

Resources

[Download Report](#)

NAME	LABOR CATEGORY
<input type="text"/>	
Abbas, Nazia	Sr IT Project Manager
Adva, Kaushik	SME Comp Sys Eng/Arch

4. Once the resource is identified, please click the pencil icon on the report to edit an existing resource.
5. Modify the resource information and select <Save Resource> button.

Edit Resource

Name
Required

Adya, Kaushik

Labor Category
Required

SME Comp Sys Eng/Architec

Resource Type
Required

Deloitte - Consulting

Email
Required

kaushik.adya@fda.hhs.gov

Employee ID
Required

Rate
Required

Max Hours

35

Active

☒

Save Resource

Cancel

- Please note that the Employee ID fields is masked for security purpose. (Note: Contact TDLPro technical support team if you need assistance.)

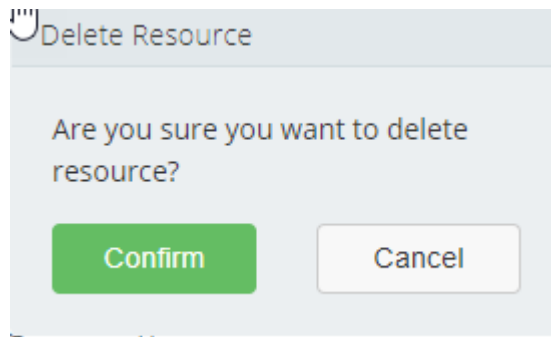
5.3 DELETE A RESOURCE

It is highly recommended that this feature is not used. It is recommended to edit the resource and uncheck the “Active” checkbox if the resource needs to be flagged as inactive. If a resource is deleted – all planned and actual hours entered in the system for that particular resource is irrecoverably lost.

- If for whatever reason, a resource needs to be deleted, please navigate to resource reports screen and click on the delete icon.

NAME	LABOR CATEGORY	EMPLOYEE ID	EMAIL	
<div> <div> </div> <div> </div> </div>				
Abbas, Nazia	Sr IT Project Manager	0001	nazia.abbas@fda.hhs.gov	
Adya, Kaushik	SME Comp Sys Eng/Architec	****3446	kaushik.adya@fda.hhs.gov	

- User will be prompted with a “Are you sure” screen.



3. Click "Confirm" button to delete the resource.

5.4 CREATE/MODIFY A NEW LABOR CATEGORY

At present, there is no UI for creating or modifying a labor category. Please contact TDLPro technical team for assistance.

6 TDL

A Technical Direction Letter (known as TDL) is how the client issues work order for Deloitte CBER CSOM team to perform work. This section describes how to create and manage TDL information.

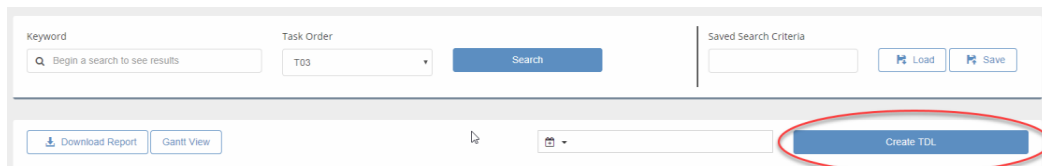
6.1 CREATE A NEW TDL

Only a PM or a PMO team member can create a new TDL.

1. Create TDL can be triggered from either the Kanban screen



2. Or from the Search screen



Daily Operations / Create TDL

Create TDL

TDL Information

Name Required field	Enter TDL Name (45 chars limit)
Project Manager Required field	
Category Required field	
TDL Type Required field	
CLIN Required field	
WBS Code	Enter WBS Code (45 chars limit)
Task Order Required field	
Planned Date Range Required field	Choose date Choose date
Budgeted Hours Required field	Budgeted Hours
Budgeted Cost Required field	\$ Budgeted Cost

Save TDL

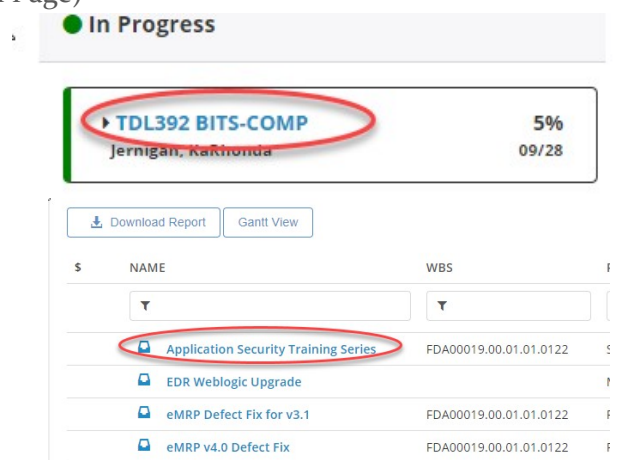
3. Enter the TDL information on the Create TDL Form
 - a. Name: Enter a 45 char limit – name of the TDL. (Note. It is recommended to use to the following naming convention:
 - i. TDLXXX – TDL Brief Description
 - b. Project Manager: Select a PM from the drop down list
 - c. Category: Select a TDL Category from the drop down
 - i. TDL
 - ii. O&M
 - iii. Others
 - iv. PTO
 - v. User Support
 - vi. PMO
 - d. TDL Type: Select a TDL Type from the drop down list
 - i. Analysis
 - ii. Major Release
 - iii. Minor Release
 - iv. Upgrade
 - v. None
 - e. CLIN – A classification of the project used to report Project Financials.
 - i. Firm Fixed Price - includes O&M, Management and Admin, and User Support WBS codes
 - ii. System Enhancement - includes all of the TDL WBS codes

- iii. Labor Hours - includes IT Testing and e-Submission Support WBS Codes
 - iv. Other
 - f. WBS Code – Deloitte Project Tracking code – used in DTE
 - i. e.g. FDA00019.00.02.02.0224
(Note: Recommended that use the “.” and not “-“. This info is critical and is used to match the TDL when time entry is imported from Deloitte’s Time Tracking system DTE)
 - g. Task Order: Select one from the dropdown list
 - i. Task Order 1
 - ii. Task Order 2
 - iii. Task Order 3
 - h. Planned Date Range – Enter the planned start and end date for the TDL
 - i. Budgeted Hours – Enter o. This info will be recalculated when new resources are added to the project.
 - j. Budgeted Cost – Enter o. This info will be recalculated when new resources are added to the project.
- 8. Click “Save TDL” to save the new TDL entry
- 9. When a new TDL is created – it is created with the status “New” and is in unapproved state. Use Edit TDL feature to modify them.
- 10. Verify that the new TDL entry is shown either in the Kanban board or in the main Daily Operations “Search” screen.

6.2 EDIT AN EXISTING TDL

To modify an existing TDL please use the following instructions.

1. Go to TDL Details page by click on the TDL link (from either the Kanban page or from the Search Page)



2. Click “Edit” on the TDL Information panel on the TDL Details page.

Home / Kanban / TDL Details

TDL391- DST 2.00.00 0%

TDL Type: Analysis
Planned Start: Jul 23, 2018
Planned Complete: Sep 27, 2019
Project Manager: Shah, Shilpa

WBS Code:
Budgeted Hours: 688
Planned Hours: 0
Actual Hours: 0

Status: New
Budgeted Cost: \$105,282.48
Planned Cost: \$0.00
Actual Cost: \$0.00

[Edit](#)

3. Modify the existing TDL Information

Edit TDL

Name Required field: TDL391- DST 2.00.00

Project Manager Required field: Shah, Shilpa

Category Required field: TDL

TDL Type Required field: Analysis

TDL Status Required field: New

CLIN Required field: System Enhancement

WBS Code: Enter WBS Code (45 chars limit)

Task Order Required field: Task Order 3

Planned Date Range Required field: 07/23/2018 09/27/2019

Budgeted Hours Required field: 688.00

Budgeted Cost Required field: \$ 105,282.48

Approved ☐

[Save TDL](#) [Cancel](#)

a. TDL Status: Select one of the values from the dropdown list

- i. New
- ii. Approved for LOE
- iii. Pending Approval
- iv. In Progress
- v. Completed
- vi. Closed

(Note: Adjusting the status will place the TDL on the correct swim lane in the Kanban board)

b. Approval: Check the flag to make TDL an active TDL.

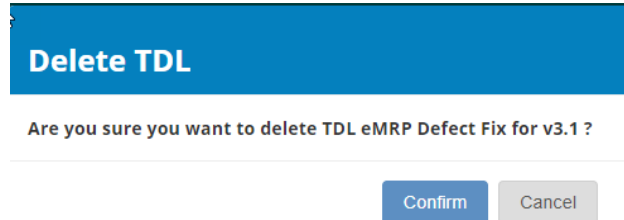
(Note: Unless a TDL is approved, it won't be included in all reports)

4. Click "Save TDL" to update the TDL information

6.3 DELETE A TDL

Only a PMO role is allowed to delete TDL entries. It is highly recommended that this feature is used with caution. Once a TDL is deleted – all hours and cost information is lost.

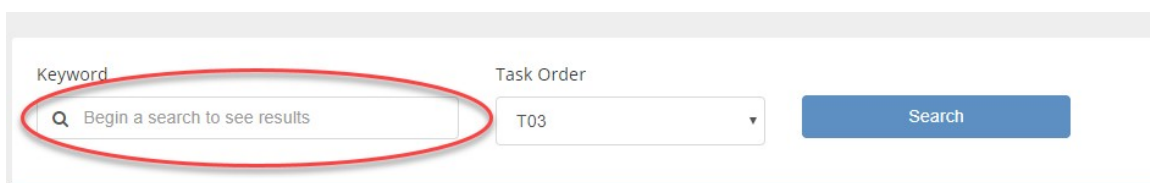
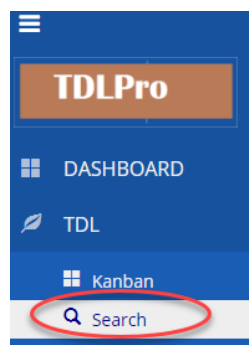
1. Use the search screen to list the TDL
2. Use the “Delete” icon on the right side of the TDL search results view to delete the TDL
3. A prompt will appear to confirm the delete action



4. Click “Confirm” to delete the TDL

6.4 SEARCH FOR TDL

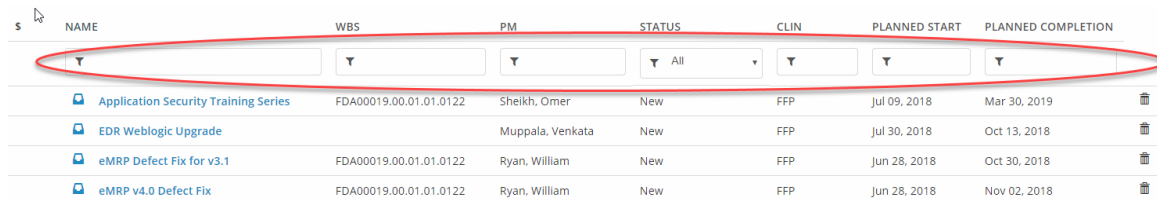
This is a core feature of TDLPro and is used to search for existing TDL entries in TDLPro. Use the “Search” item on the left navigation bar to arrive at the search screen



1. To search for any TDL from all Task orders, Leave “keyword” blank and Task Order selection blank and click Search. All TDL entries will be reported. (Note: A blank search for a PM role will display only the TDL entries from which they are the assigned PM)
2. To search for a TDL with a partial TDL name, enter the partial text in the “keyword” input box and click Search. Matching TDL entries will be report. (Note. A PM should use this feature to search for other TDLs for which they are not the assigned PM).
3. To list all TDLs under a particular Task Order, leave “keyword” blank and select the right Task Order from the drop down and click search

6.4.1 Search Filter

There are several column filters on the search results screen which can be used to narrow your post search results



\$	NAME	WBS	PM	STATUS	CLIN	PLANNED START	PLANNED COMPLETION
				All			
	Application Security Training Series	FDA00019.00.01.01.0122	Sheikh, Omer	New	FFP	Jul 09, 2018	Mar 30, 2019
	EDR Weblogic Upgrade		Muppala, Venkata	New	FFP	Jul 30, 2018	Oct 13, 2018
	eMRP Defect Fix for v3.1	FDA00019.00.01.01.0122	Ryan, William	New	FFP	Jun 28, 2018	Oct 30, 2018
	eMRP v4.0 Defect Fix	FDA00019.00.01.01.0122	Ryan, William	New	FFP	Jun 28, 2018	Nov 02, 2018

In addition there is data range filter to filter TDLs that fall within a given date range.

Download Report

Gantt View

Cre

\$	NAME	WBS	PM	STATUS	CLIN	PLANNED START	PLAN
<div><div></div></div>		<div><div></div></div>	<div><div></div></div>	<div><div>All</div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
<div><div></div></div>	<div>Application Security Training Series</div>	FDA00019.00.01.01.0122	Sheikh, Omer	New	FFP	Jul 09, 2018	Mar 30, 2019
<div><div></div></div>	<div>EDR Weblogic Upgrade</div>		Muppala, Venkata	New	FFP	Jul 30, 2018	Oct 13, 2018

(Note: to sort columns just click on the column header)

Download Report

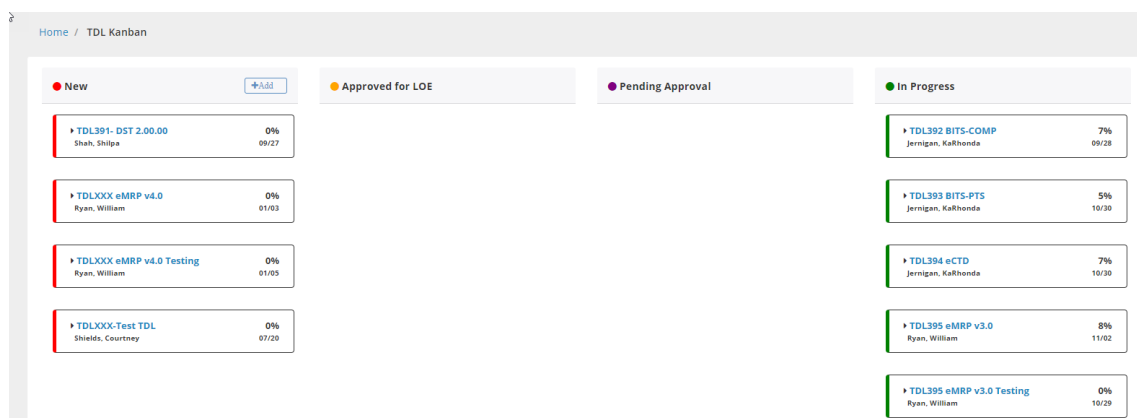
Gantt View

Create

\$	NAME	WBS	PM	STATUS	CLIN	PLANNED START	PLAN
				All			
	Application Security Training Series	FDA00019.00.01.01.0122	Sheikh, Omer	New	FFP	Jul 09, 2018	Mar 30, 2019
	EDR Weblogic Upgrade		Muppala, Venkata	New	FFP	Jul 30, 2018	Oct 13, 2018

6.5 KANBAN BOARD

TDLPro provides a swim lane or a “Kanban Board” view of projects. This view is visible only for PM and PMO roles



Home / TDL Kanban			
New	Approved for LOE	Pending Approval	In Progress
<div>TDL391- DST 2.00.00 Shah, Shilpa 0%</div>			<div>TDL392 BITS-COMP Jernigan, Kakhonda 7%</div>
<div>TDLXXX eMRP v4.0 Ryan, William 0%</div>			<div>TDL393 BITS-PTS Jernigan, Kakhonda 5%</div>
<div>TDLXXX eMRP v4.0 Testing Ryan, William 0%</div>			<div>TDL394 eCTD Jernigan, Kakhonda 7%</div>
<div>TDLXXX-Test TDL Shields, Courtney 0%</div>			<div>TDL395 eMRP v3.0 Ryan, William 8%</div>
			<div>TDL395 eMRP v3.0 Testing Ryan, William 0%</div>

The view groups TDL Kanban cards by TDL status. TDL Kanban card displays TDL name, % completion, Project Manager and Project Planned Completion date



Note: % Completion = “Actual Cost”/”Planned Cost”

7 RESOURCE ALLOCATION

After a TDL is created, this section describes how to add Resources to the TDL.

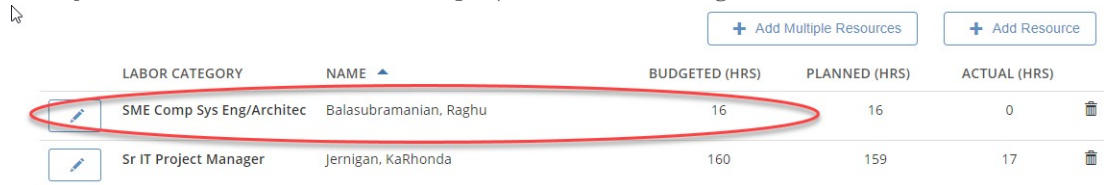
7.1 ADD RESOURCES TO TDL

7.1.1 Add a single resource

1. Navigate to TDL details page from Kanban board or from search screen
2. Click “Add Resource” button

A screenshot of the 'Add Resource' form in the TDL details page. The form is titled 'Add Resource' in a blue header. Below the header, there are four required fields: 'Name' (a dropdown menu), 'Labor Category' (a dropdown menu), 'Hours' (a text input field with 'Hours' entered), and 'Date Range' (a date range selector showing 'June 18, 2018 - July 17, 2018'). At the bottom right, there are two buttons: 'Save Resource' and 'Cancel'. Above the form, there is a table with columns: 'LABOR CATEGORY', 'NAME', 'BUDGETED (HRS)', 'PLANNED (HRS)', and 'ACTUAL (HRS)'. There are also buttons for '+ Add Multiple Resources' and '+ Add Resource' (which is circled in red).

3. Enter the following information
 - a. Name: Select the resource name from the dropdown list
 - b. Labor Category: This field is automatically filled by the system
 - c. Hours: Enter the budgeted hours for this resource
 - d. Date Range: (Non-functional for now. Ignore this)
4. Click “Save Resource” to add resource to the project.
5. Verify the resource is added to the project with the budgeted hours

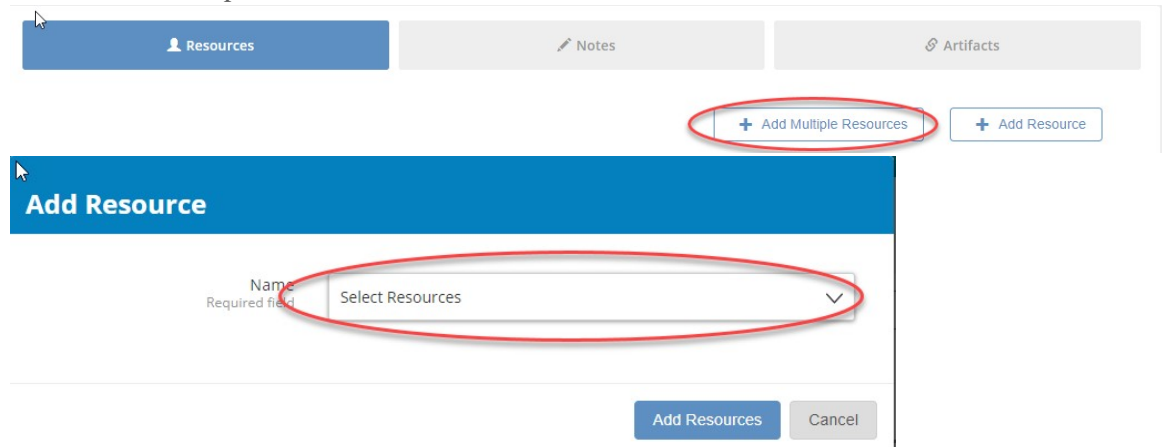


LABOR CATEGORY	NAME	BUDGETED (HRS)	PLANNED (HRS)	ACTUAL (HRS)
SME Comp Sys Eng/Architec	Balasubramanian, Raghu	16	16	0
Sr IT Project Manager	Jernigan, KaRhonda	160	159	17

7.1.2 Add multiple resources

TDLPro provides a feature to add multiple users to the project at once.

1. Navigate to TDL details page from Kanban board or from search screen
2. Click “Add Multiple Resources” button



3. Select resources from the dropdown and click “Add Resources” button to add multiple resources to the project.
4. Verify that the resources are added to the TDL. (Note: these resources are added with “o” budgeted hours. You need to edit budgeted hours to update to the correct hours.

7.1.3 Swap a resource

TDLPro provides a feature to swap a resource with another resource.

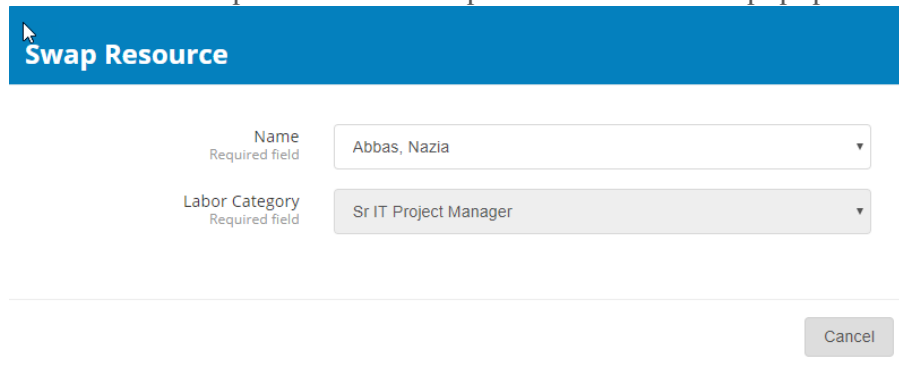
Note: To swap a resource, the following conditions need to be met:

1. Resource should have 0 actual hours
2. Resource to be swapped with should not be listed in the TDL

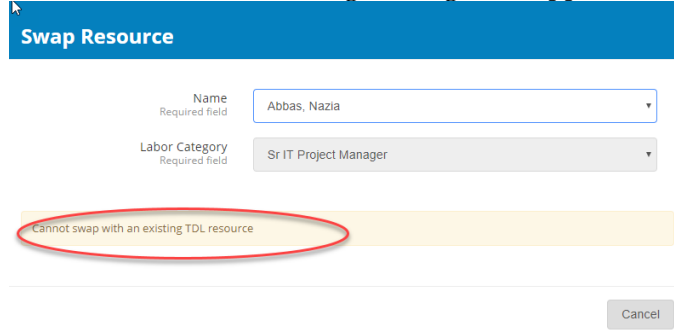
To swap a resource:

1. Navigate to TDL details page from Kanban board or from search screen

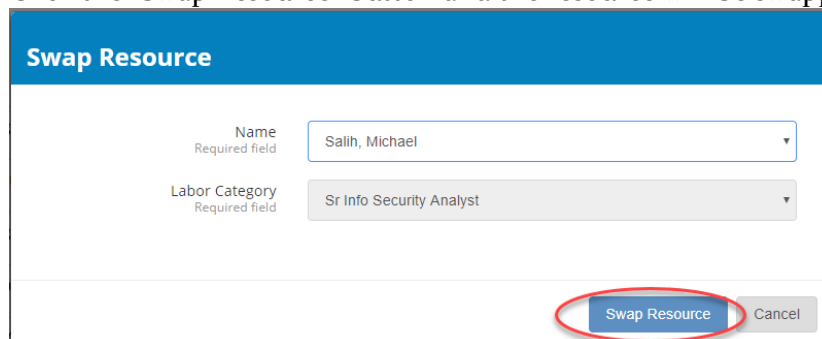
2. On Details page, the resource eligible for swapping will have the swap icon
3. Click on the “Swap” icon and a “Swap Resource” form will popup




4. By default, “Swap Resource” button will not be visible. Please select another resource you want to swap with and the “Swap Resource” button will appear. If you select a resource that already exists in TDL, the following message will appear.



5. Select the resource name you want to swap. Remember, the Labor Category field is Read-Only.
6. Click the “Swap Resource” button and the resource will be swapped.



7. On Details page, you will see the swapped resource will be listed and original resource will be removed from the list. The system automatically migrates all planned hours from the original resource to the newly swapped resource.
8. If you want to swap with a resource that exists in TDL with zero actual hours, then delete the resource from TDL first by clicking the  icon. Then use “Swap Resource” icon to swap the resource.





7.2 EDIT BUDGETED HOURS

To update budgeted hours

1. Navigated TDL Details page

2. Review the list of the resources and click the “Pencil” icon on the list to edit the project resource information

[+ Add Multiple Resources](#)
[+ Add Resource](#)

	LABOR CATEGORY	NAME ▲	BUDGETED (HRS)	PLANNED (HRS)	ACTUAL (HRS)	
	Sr IT Project Manager	Abbas, Nazia	40	0	0	
	SME Comp Sys Eng/Architec	Adya, Kaushik	0	0	0	

Edit Resource

Name
Required field

Abbas, Nazia


Labor Category
Required field

Sr IT Project Manager

Hours
Required field

40





Date Range
Required field

 June 18, 2018 - July 17, 2018 ▼

Save Resource

Cancel

3. Modify the budgeted hours and click “Save Resources”
4. Verify that the budgeted hours are updated correctly on the TDL details page

	LABOR CATEGORY	NAME ▲	BUDGETED (HRS)	PLANNED (HRS)	ACTUAL (HRS)	
	Sr IT Project Manager	Abbas, Nazia	40	0	0	
	SME Comp Sys Eng/Architec	Adya, Kaushik	0	0	0	

5. TDL Details summary page should reflect the total budgeted hours and cost accurately.

Home / Kanban / TDL Details

TDL380 RMS-BLA 09.03.00 59%

TDL Type: Minor Release

Planned Start: Apr 12, 2018

Planned Complete: Jun 16, 2018

Project Manager: Ryan, William

WBS Code: FDA10491.01.02.02.0380

Budgeted Hours: 336.25

Planned Hours: 347.5

Actual Hours: 172.5

Status: Completed

Budgeted Cost: \$52,197.39

Planned Cost: \$54,520.42

Actual Cost: \$32,006.33

[Edit](#)

7.3 ADD WEEKLY PLAN RESOURCE HOURS

Once the resources are added, PM is responsible for allocating weekly planned hours on the project. PM can use “Weekly Planner” button on the TDL details page to accomplish that.

1. Click “Weekly Planner” button on the TDL details page

Home / Kanban / TDL Details

TDL380 RMS-BLA 09.03.00 59%

TDL Type: Minor Release
Planned Start: Apr 12, 2018
Planned Complete: Jun 16, 2018
Project Manager: Ryan, William

WBS Code: FDA10491.01.02.02.0380
Budgeted Hours: 336.25
Planned Hours: 347.5
Actual Hours: 172.5

Status: Completed
Budgeted Cost: \$52,197.39
Planned Cost: \$54,520.42
Actual Cost: \$32,006.33

Edit

Weekly Planner

Daily Planner

Plan Tasks

Milestones

Burndown

- System navigates to the Resource Weekly Planner page

Resource Weekly Planner

TDL380 RMS-BLA 09.03.00
Planned Start: Apr 12, 2018
Planned Complete: Jun 16, 2018

WBS Code: FDA10491.01.02.02.0380
Budgeted Hours: 347.5
Planned Hours: 347.5

Status: Completed
Budgeted Cost: \$54,520.42
Planned Cost: \$54,520.42

For Week Ending

Prev

07/21/2018

Next

Save

RESOURCE	FILL	07/21	07/28	08/04	08/11	08/18	08/25	09/01	TOTAL (HRS)	TOTAL (\$)
Adya, Kaushik Balance: 2 hrs	40	0	0	0	0	0	0	0	2	\$423.92
Balasubramanian, Raghu Balance: 0 hrs	40	0	0	0	0	0	0	0	48	\$10,174.08

- Enter weekly planned hours for each resource on the project on the corresponding week column.

For Week Ending

Prev

04/14/2018

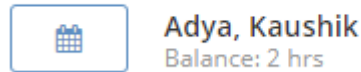
Next

Save

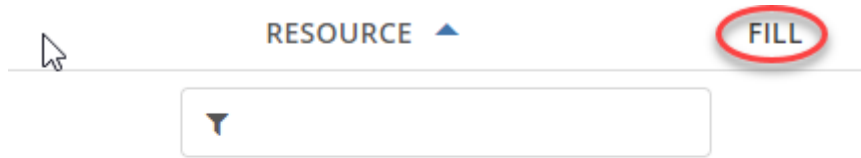
RESOURCE	FILL	04/14	04/21	04/28	05/05	05/12	05/19	05/26	TOTAL (HRS)	TOTAL (\$)
Adya, Kaushik Balance: 2 hrs	40	0	0	0	0	0	2	0	2	\$423.92
Balasubramanian, Raghu Balance: 0 hrs	40	9	9	8	8	8	6	0	48	\$10,174.08
Kapoor, Ram Balance: 2 hrs	40	0	0	0	0	0	0	0	6	\$801.36
Leung, Nicole Balance: -4 hrs	40	2	0	0.5	0.5	1	4	1	13.5	\$1,983.42
Morris, Rob Balance: 0 hrs	40	23	23	24	0	0	0	0	74	\$15,685.04
Nuthalapati, Santhi Balance: -37 hrs	40	3	3	4	6.5	6.5	6.5	6.5	73	\$9,165.15
Passarelli, Emily Balance: -5.25 hrs	40	1	2	2	1	1	1	1	17	\$1,609.05

- PM can enter weekly plan hours for all resources on the project for 8 weeks at a time.
- Click “Save” button to save the planned hours
- Click “Prev” and “Next” button to navigate to previous or next 8 weeks window range. (Note: if you navigate without saving, the information is lost).
- Screen provides you a bunch of visual helpful cues and information

- a. Balance hours: As you enter plan hours, this section provides you how many hours left from what you originally budgeted for that resource

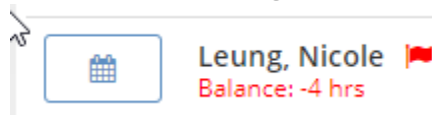


- b. Fill link: Use this link as a quick accelerator to fill the same hours across the row for a resource. When you click this link, you will prompted to enter a number that will be spread across the row fields.



Click the “Check” icon to spread the hours.

- c. Flag indicator: When the planned hours exceed the budgeted, the system will provide a red flag indicator.



- d. Total Planned Hours and Planned Cost: The last two columns provide the overall planned hours and cost for the resource. (Note: It is the sum of the row values but the overall Project planned hours and cost for the resource)

	RESOURCE	FILL	04/14	04/21	04/28	05/05	05/12	05/19	05/26	TOTAL (HRS)	TOTAL (\$)
	Adya, Kaushik Balance: 2 hrs	40	0	0	0	0	0	2	0	2	\$423.92
	Balasubramanian, Raghu Balance: 0 hrs	40	9	9	8	8	8	6	0	48	\$10,174.08
	Kapoor, Ram Balance: 2 hrs	40	0	0	0	0	0	0	0	6	\$801.36
	Leung, Nicole Balance: -4 hrs	40	2	0	0.5	0.5	1	4	1	13.5	\$1,983.42

- e. Navigate to any given start weekend: When you select a date, it automatically switches to the “Saturday” of the selected date and the screen refreshes to begin with that Saturday as the starting week.



For Week Ending

Prev 04/14/2018 Next

Save

RESOURCE	FILL	04/14	04/21	04/28	05/05	05/12	05/19	05/26	TOTAL (HRS)	TOTAL (\$)
Adya, Kaushik Balance: 2 hrs	40	0	0	0	0	0	2	0	2	\$423.92
Balasubramanian, Raghu Balance: 0 hrs	40	9	9	8	8	8	6	0	48	\$10,174.08

7.4 ADD DAILY PLAN RESOURCE HOURS

This feature is available, if the PM plans to allocate resource hours on a daily basis. TDLPro saves resource plan hours on a daily basis. When PM allocates resources hours on a weekly basis, the system splits the weekly hours by 5 and spread it across daily. Daily Plan hours is useful when you want to allocate PTO or OOO action.

1. Navigate to TDL details page.

Home / Kanban / TDL Details

TDL380 RMS-BLA 09.03.00 59%

TDL Type: Minor Release
Planned Start: Apr 12, 2018
Planned Complete: Jun 16, 2018
Project Manager: Ryan, William

WBS Code: FDA10491.01.02.02.0380
Budgeted Hours: 336.25
Planned Hours: 347.5
Actual Hours: 172.5

Status: Completed
Budgeted Cost: \$52,197.39
Planned Cost: \$54,520.42
Actual Cost: \$32,006.33

Weekly Planner Daily Planner Plan Tasks Milestones Burndown

2. Click "Daily Planner" button
3. Allocate daily plan hours for all resources on the project.

For Week Ending

Prev 07/21/2018 Next

RESOURCE	SPLIT	SUN 07/15	MON 07/16	TUE 07/17	WED 07/18	THU 07/19	FRI 07/20	SAT 07/21	TOTAL (HRS)	TOTAL (\$)
Balasubramanian, Raghu Balance: 0 hrs	40	0	0	0	0	0	0	0	0	\$0.00
Morris, Rob Balance: 0 hrs	40	0	0	0	0	0	0	0	0	\$0.00
Adya, Kaushik Balance: 2 hrs	40	0	0	0	0	0	0	0	0	\$0.00

4. Split: This useful link will help split the hours evenly across all weekdays.

RESOURCE

SPLIT

SUN 07/15 MON 07/16 TUE 07/17 WED 07/18 THU 07/19 FRI 07/20

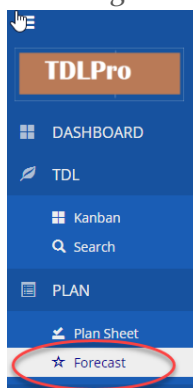
Balasubramanian, Raghu Balance: 0 hrs	40	0	0	0	0	0	0
--	----	---	---	---	---	---	---

5. There are visual cues for denoted balance hours = budgeted – planned and flag for exceeding budgeted hours.

7.5 EDIT PLANNED HOURS

PM can modify planned hours at any time by revisiting the TDL details page. There is another feature in TDLPro that allows PM to review and edit planned hours for resources across multiple projects.

1. Navigate to “Resource Forecast” page by clicking on the “Forecast” menu on the left navigation bar



2. System navigates to Resource Forecast report screen.

Resource Forecast

Select Start Period: ☒ Active

NAME	TYPE	MAX	LCAT	AVAIL	TDL	07/21	07/28	08/04	08/11	08/18	08/25	09/01	09/08
Abbas, Nazia	RCNS	40	Sr IT Project Manager	13%	16%	40	40	40	40	40	37	19	22.6
Adya, Kaushik	RCNS	35	SME Comp Sys Eng/Architec	0%	68%	35	35	35	35	35	35	35	35
Alagappa, Anand	RCNS	35	SME Comp Sys Eng/Architec	8%	89%	35	35	35	35	35	35	30	17
Alam, Prianka	RCNS	40	Sr Training/Dev Spec	-2%	53%	40	40	40	40	40	40	40	48
Allen, Gregory	RCNS	20	Sr Comp Sys Eng/Architect	75%	90%	1	5	5	5	5	5	5	9
Annamreddy, Vineeth	RCNS	40	Jr Comp Sys Eng/Arch	18%	0%	40	40	30	25	30	30	30	38
Balasubramanian, Raghu	RUDC	35	SME Comp Sys Eng/Architec	31%	76%	35	35	20	25	20	19	17	23
Barija, Sagar	RUDC	40	JM Comp Sys Eng/Arch	9%	0%	40	40	40	40	32	32	32	34
Brown, Demetrius	RUDC	40	JM Comp Usr Supp Spec	19%	0%	40	40	40	40	24	24	24	27

3. Click the “Resource” name and the system launches a popup screen for editing planned resources hours across multiple TDLs for the resource

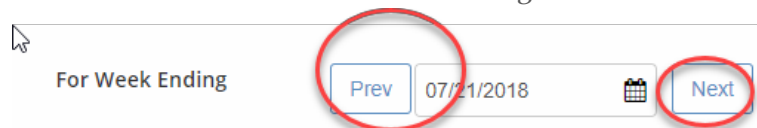
Balasubramanian, Raghu

For Week Ending: Prev 07/21/2018 Next Show WBS Code

TDL	PLANNED	07/21	07/28	08/04	08/11	08/18	08/25	09/01	TOTAL
TDL393 BITS-PTS Balance: 0 hrs	3	3	1	1	1	1	0	0	7
Shared Weblogic Upgrade Balance: 0 hrs	4	4	2	0	2	0	2	0	10
TDL392 BITS-COMP Balance: 0 hrs	1	1	4	1	1	0	0	0	7
TDL396 BITS-URVR Balance: 0 hrs	13	13	3	3	5	3	3	3	33
User Support Balance: -15.6 hrs	2	2	0	5	5	6	4	4	26
TDL398 BITS-CATTS v1.03.00 Balance: 10 hrs	12	12	25	10	11	10	10	10	88
Total		35	35	20	25	20	19	17	171

Save

- Edit the planned hours and click “Save” to save the modified hours.
- Show WBS Code: Selecting this will toggle TDL names to WBS codes.
- Select “Prev” and “Next” buttons to navigate to different date ranges



- There are visual cues that provide useful hints (Balance hours etc.)

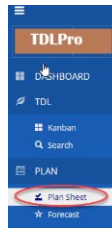
TDL	PLANNED
TDL393 BITS-PTS Balance: 0 hrs	3
Shared Weblogic Upgrade Balance: 0 hrs	4

8 PLAN SHEET

All TDLPro users have access to this screen. Once PM has allocated hours to the project, the Project Resource will have access to a report screen that gives a summary of authorized plan sheet to work on TDL during the month.

8.1 REVIEW PLANNED HOURS

- Navigate to the Plan Sheet by selecting “Plan Sheet” on the left navigation menu.



2. The Plan Sheet shows authorized hours summary

My PlanSheet

Period's First Weekend Prev 07/07/2018 Next ☐ Show WBS Code

TDL	07/07	07/14	07/21	07/28	TOTAL
TDL393 BITS-PTS Balance: 4 hrs	0	0	3	1	4
Shared Weblogic Upgrade Balance: 6 hrs	0	0	4	2	6
TDL392 BITS-COMP Balance: 5 hrs	0	0	1	4	5
TDL396 BITS-URVR Balance: 16 hrs	0	0	13	3	16
User Support Balance: 2 hrs	0	0	2	0	2
TDL398 BITS-CATTS v1.03.00 Balance: 37 hrs	0	0	12	25	37
PTO/Holiday/OOO Balance: 35 hrs	35	35	0	0	70
Total	35	35	35	35	140

3. A PMO role has additional feature available. They are able to view plan sheet of any resource by selecting the resource name from the dropdown list.

My PlanSheet

Resource: Lee, Cindy

Period's First Weekend Prev 07/07/2018 Next ☐ Show WBS Code

TDL	07/07	07/14	07/21	07/28	TOTAL
PMO Balance: 84 hrs	16	40	40	40	136
PTO/Holiday/OOO Balance: 0 hrs	24	0	0	0	24
Total	40	40	40	40	160

4. Please note that when a resource is proposed for a TDL that is not "Active" yet, the plan sheet still shows the TDL but will have a tag "Proposed" right next to it. Resources cannot charge time against the TDL that is not active yet.

TDL421 - Modernization Enterprise Arch. Analy	20	0	0	0	20
Balance: 0 hrs					

Proposed

8.2 SEND CHARGE AUTHORIZATION EMAIL

This feature is under construction.

Select Start Period MM/DD/YYYY

4. Some useful visual tips:
- Red Bold Text: When resource planned hours exceed the resource planned capacity, planned hours are shown in bold text.

Alam, Prianka	RCNS	40	Sr Training/Dev Spec	-2%	53%	40	40	40	40	40	40	40	48
---------------	------	-----------	----------------------	-----	-----	----	----	----	----	----	----	----	-----------

- Filter by resource type: Reports can be filtered by resource types:

NAME TYPE

- RCN – Subcontractors
- RCNS – Deloitte consultants
- RUDC – Deloitte USDC resource

- MAX column indicates resource allocated capacity

NAME TYPE MAX LCAT AVAIL TDL

- AVAIL column indicates the availability of resources for the given 8 week window. Availability is based on weekly capacity of resources
- TDL: column indicates how much % of the resource times goes to TDL work

8.4 EXPORT BREAKDOWN

Resource Forecast summary data can be exported to a XLSX file by clicking on the “Breakdown” button on the resource forecast page.

Resource Forecast

Select Start Period MM/DD/YYYY ☒ Active

8.5 EXPORT CLIN REPORT

Planned Resource CLIN report – A report that identifies, groups and summarizes planned resource hours and cost can be exported to a XLSX file by clicking on the CLIN button

Resource Forecast

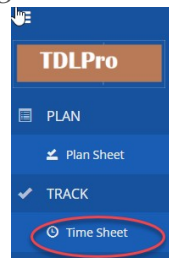
Select Start Period MM/DD/YYYY ☒ Active

9 TIME SHEET

TDLPro provides ability to track actual hours spent on TDL and other CBER projects by the Deloitte CBER CSOM team. Subcontractors are expected to enter their timesheet in TDLPro whereas Deloitte resources enter their time in DTE.

9.1 CONTRACTORS TIME ENTRY

1. CBER CSOM Subcontractors can navigate to the “Timesheet” screen by clicking on “Time Sheet” item on the left navigation bar.



2. Enter time against the TDL or project on a daily basis and click “Save”

A screenshot of the 'My Timesheet' screen in TDLPro. The screen shows a table for entering time against various TDL projects. The table has columns for 'TDL', 'PLANNED', and days of the week from Sunday to Saturday, followed by a 'TOTAL' column. The rows list various projects like 'TDL383 HCTERS Release', 'TDL384 BER Release', etc. A red circle highlights the 'Save' button at the bottom right of the screen.

9.2 DTE IMPORT

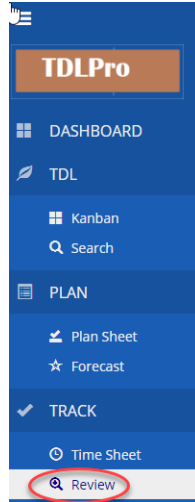
Time entries done in Deloitte’s DTE can be imported into TDLPro using this feature. PMO has been given specific instructions on how to do this.

A screenshot of the 'My Timesheet' screen in TDLPro. The screen shows a 'Resource' dropdown menu. To the right of the dropdown is a button labeled 'Import DTE', which is circled in red.

9.3 REVIEW ACTUAL HOURS

PMO or a PM role can review all actual hours entered in TDLPro system.

1. Navigate to “Review” item on the left navigation bar



2. Review page will provide a summary of all actual project hours entered in the system

Timesheet Review

Select Start Period: MM/DD/YYYY ☒ Active

NAME	TYPE	LCAT	AVAIL	TDL	07/21	07/14	07/07	06/30	06/23	06/16	06/09	06/02
Abbas, Nazia	RCON	Sr IT Project Manager	80%	60%	0	33	0	0	0	0	25	5
Adya, Kaushik	RCNS	SME Comp Sys Eng/Architec	89%	94%	0	0	0	12	0	0	0	23
Alagappa, Anand	RCNS	SME Comp Sys Eng/Architec	75%	100%	0	40	8	0	0	0	0	32
Alam, Prianka	RCNS	Sr Training/Dev Spec	77%	43%	0	42	16	16	0	0	0	0
Allen, Gregory	RCNS	Sr Comp Sys Eng/Architect	99%	100%	0	2	0	0	0	0	0	0
Annamreddy, Vineeth	RCNS	Jr Comp Sys Eng/Arch	75%	0%	0	32	32	16	0	0	0	0

3. Some useful visual tips:
 - a. Red Bold Text: When resource actual hours exceed the resource planned capacity, planned hours are shown in bold text.
 - b. Filter by resource type: Reports can be filtered by resource types:



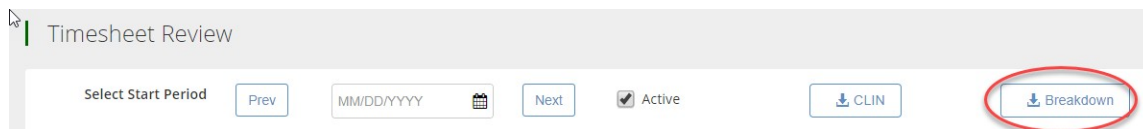
- i. RCON – Subcontractors
 - ii. RCNS – Deloitte consultants
 - iii. RUDC – Deloitte USDC resource
- c. MAX column indicates resource allocated capacity



- d. AVAIL column indicates the availability of resources for the given 8 week window. Availability is based on weekly capacity of resources
- e. TDL: column indicates how much % of the resource times goes to TDL work

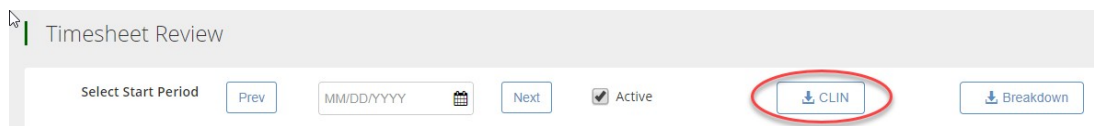
9.4 EXPORT BREAKDOWN

Resource actual hours summary data can be exported to a XLSX file by clicking on the “Breakdown” button on the resource forecast page.



9.5 EXPORT CLIN REPORT

Actual Hours CLIN report – A report that identifies, groups and summarizes actual resource hours and cost can be exported to a XLSX file by clicking on the CLIN button



10 REPORTS

This section is yet to be documented

10.1 VARIANCE REPORT

10.2 PLAN VS ACTUAL

11 SKILLS MATRIX

This section is yet to be documented

11.1 ENTER RESOURCE SKILLS

11.2 REVIEW SKILLS MATRIX