1. **PURPOSE AND DESCRIPTION**

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| **Project ID** | SGL15009 | | **Project Name** | | | Associate Portal | |
| **Use Case ID** | UC –020 | | | | | | |
| **Use Case Name** | Associate Allocation | | | | | | |
| **Purpose/Goal** | To allocate associates against Talent requisition for the open positions in a project. | | | | | | |
| **Description** | Associate allocation is a plan for using available associates, for an open position against an approved Talent Requisition. It is the process of allocating associates among the various projects or business units. | | | | | | |
| **Actors** | * HR Manager | | | | | | |
| **Priority** | High | Frequency of Use | | | On Demand | | |
| **Includes** | NA | | | | | | |
| **Prepared By** | Sarada Prasanna Nath | | | **Date** | | | 12/07/2016 |
| **Reviewed By** | Shivudu Maddi | | | **Date** | | | 12/07/2016 |
| **Last Updated By** |  | | | **Date** | | |  |

1. **TRIGGERS, PRE-CONDITIONS AND POST-CONDITIONS**

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| **Triggers** | When a Talent requisition is approved. |
| **Pre-Conditions** | * An approved requisition should be present * The target project should exist in the organization for allocation. * A program manager then a lead should be assigned to the target project. * Associates are present in the organization to be allocated. |
| **Post- Conditions** | * A notification should be sent after the associates are allocated for that requisition, to the Associate, Lead, Competency Lead and Program Manager. |

1. **NORMAL FLOW**

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| User | System | Alternate flow |
| 1. User clicks on Talent Management Tab. | * System shows Associate Allocation menu option. |  |
| 1. User clicks on Associate Allocation menu. | * System shows the list of approved Talent Requisition requests on the screen. The Talent Requisitions allocation status are in open status. |  |
| 1. User clicks on Detail button to allocate associate for a Talent Requisition from the displayed list. | * System shows the Associate Allocation screen. * System shows below UI controls in the Associate Allocation screen.   + TR Number: System shows the selected Talent Requisition number.   + Department.   + Project Type.   + Project.   + No of Positions.   + Role.   + Allocated Position.   + Remaining Position.   + View Matching Profiles button. |  |
| 1. User clicks on View Matching Profiles button. | * System gets and shows all the list of Associate based on the role, skills and project for associate allocation. * By default system shows list of Associates from Talent pool project. * System shows below UI controls after View Matching Profiles button click, in the Associate Allocation screen.   + Associate Name.   + Reporting Manager: System gets the target project lead and competency leads list and shows in the drop down. By default target project lead will be selected.   + Allocation%: System shows four option as 100,75,50,25.   + Billable %: System allows to enter percentage of billability of an Associate while allocating.   + IsCritical : Radio button to specify that the Associate is critical or not.   + Effective Date: System shows a calendar control to provide effective date to capture allocation effective date.   + Allocate Button: System shows Allocate button to allocate the selected Associates to the target project. * System provides search functionality to further filter the list of Associates by changing the project name, skills. |  |
| 1. **Extended Flow:** User selects another project and clicks on Search button. | * System gets and shows all the list of Associate based on the skills and selected project for associate allocation. |  |
| 1. Selects Reporting Manager. | * System allows to select the lead of the target project and competency leads (if the Associate is above G3 grade the reporting manager may not be the lead). |  |
| 1. Selects Allocation % | * System allows to select four option as 100, 75, 50, 25 (This is to restrict more than 4 allocation for an Associate). |  |
| 1. Enters Billable % | * System allows to enter billable percentage as mentioned in the TR. |  |
| 1. Checks IsCritical | * System allows to mark the Associate as critical associate. |  |
| 1. Selects Effective Date | * System allows to selecting date only which is greater than or equal to current date. |  |
| 1. Clicks on Allocate Button | * System allocates that Associate to the target project on the selected Effective Date. * System saves all the allocation related data (Associate Name, Project Name, and Reporting Manager, Allocation %, Billable % and effective date information) for future reference. * System checks whether for an Associate is there any role change. If role is changed then system triggers KRA assignment process. * System triggers an email notification to the concerned persons (Associate, Competency Lead, Program Manager, Department Head and HR Manager). * System gets the remaining position and filled position so far and shows the updated status of the TR as partially filled on the screen. * If TR is completely filled than it will not be shown any more in the TR list to be allocated. * If the TR is partially filled then the normal flow will be repeated till closure of the TR. |  |

1. **ALTERNATIVE FLOW**

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| **Alt 1:**   1. There is no matching profile found for an approved job/vacancy/ Talent Requisition request. 2. HR Manager tags this Talent Requisition with TA (Talent Acquisition) tag. 3. This triggers Talent Acquisition process to start.(TBD) |

1. **EXCEPTIONS**

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| For the associates who are above G3 and G4, their Reporting manager may or may not be the Lead of the allocated project. |

1. **BUSINESS RULES**

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| * System should allow four types of shared allocation.   For Example, 100%,75%,50%,25%  Shared allocation should not exceed 100% for an associate.   * Allocation should be against the role. * Date of Allocation is current date and effective allocation date is current or future date. * Allocation should be done by HR Manager. * KRA assignment is triggered when the role is changed for an associate after allocation. |

1. **SPECIAL REQUIREMENTS**

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| NA |

1. **ASSUMPTIONS**

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1. **NOTES AND ISSUES**

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| NA |

1. **ACCEPTANCE CRITERIA AND TESTS**

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| * If all the open position for a requisition is filled then that Talent requisition will be closed. * If it is partially fulfilled, then the Talent requisition still will be available for allocation. * System should send a notification to the concerned person (Associate, Competency Lead, Program Manager, Department Head and HR Manager) on allocation completion. |