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## Introduction

### Capacity Planning Tool (CPT)

Capacity Planning Tool is a one solution Web-Based tool for all activities with respect to managing projects and resources. Using this we can keep track of capacity of an 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.

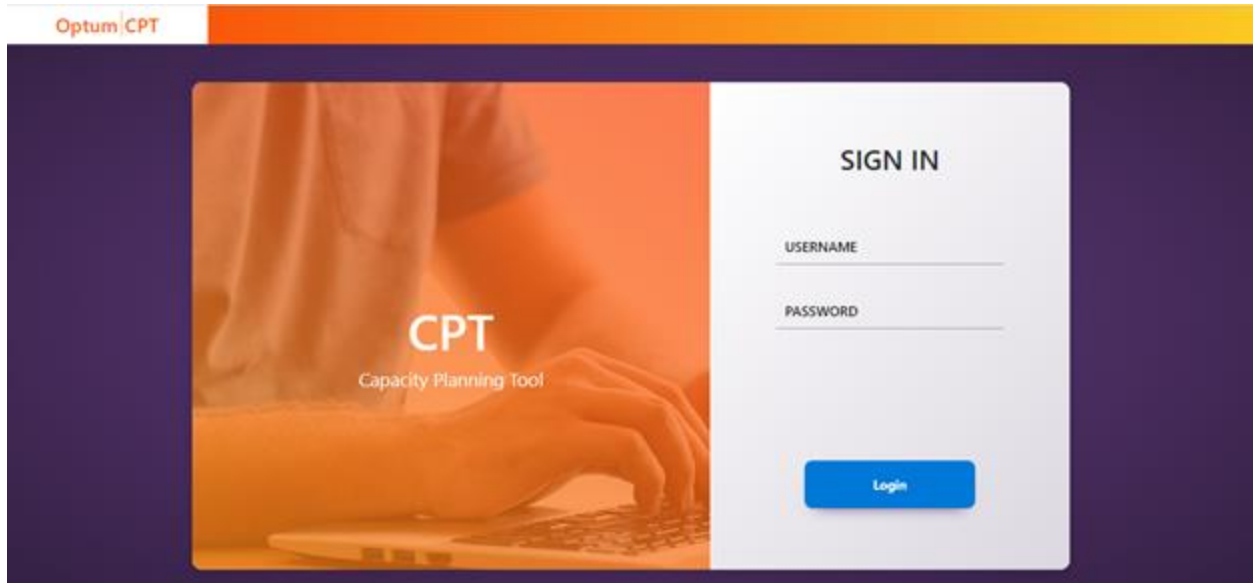
Agenda for this implementation is to bring multiple applications such as PPM Optics, TFS sprint, etc. on one platform for different markets. With the help of this tool, we can have all entry like Projects, Resources, Holidays, Markets, etc. directly from dedicated Master pages, furthermore from Project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

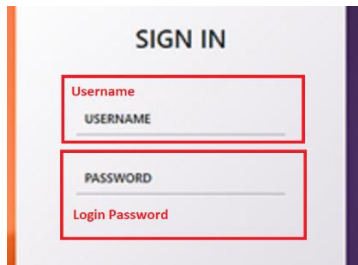
### Login Screen

This is the first screen where a user is navigated, and this provides the interface through which a valid user can use.

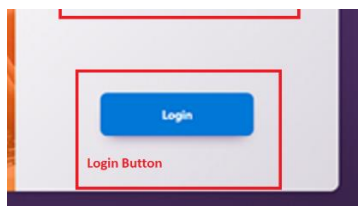


Screen provided for users to login using valid credentials. Using this screen, users with valid credentials can login. And use the app.

**Step 1:** User provides login credentials.



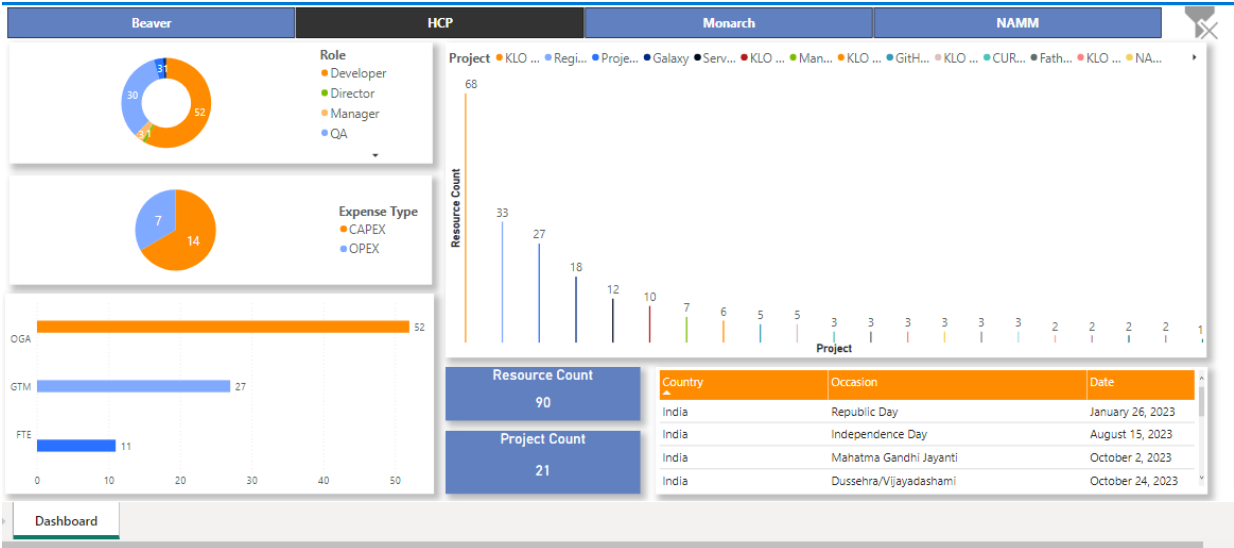
**Step 2:** User clicks the Login button



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

Dashboard

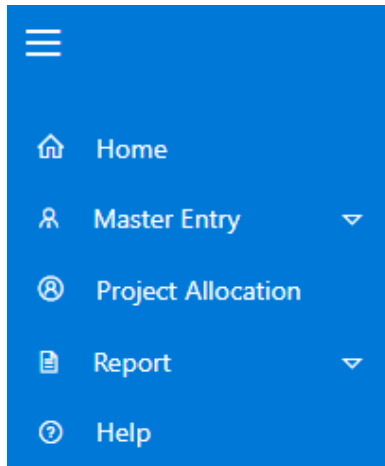
The dashboard shows Markets, Project role, Expense Type and Holiday data. We have visuals on Project role along with Expense Type for project in a selected market. It also shows projects along with the number of resources working in the project using bar chart. The holiday list shows holidays along with location for selected Market.



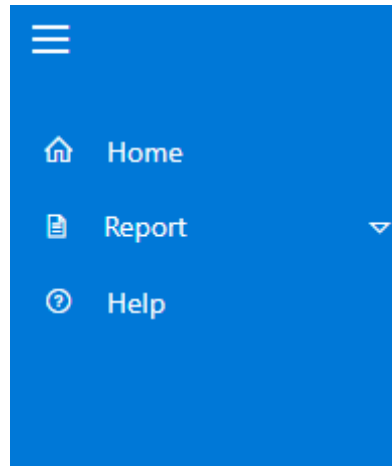
Dashboard with different graphs and charts related to ongoing projects and resources.

## Role Based Access

### Admin



### General User

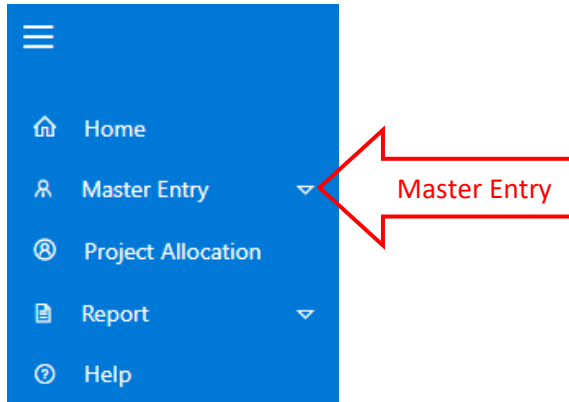


We have two different kinds of roles namely admin and user, depending upon the role of the user we have different capabilities accessible to the users and it can be seen in the attached images above.

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.

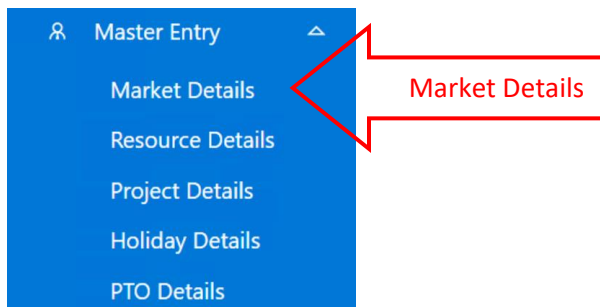


## Market Details

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

A screenshot of the 'Market Details' screen. The screen has a header 'Market Details' and a sub-header 'Master | Market'. There is a '+ Add Market' button in the top right. Below the header, there is a 'Status' filter set to 'Active' and a 'Clear Filters' button. A table is displayed with the following columns: Market Name, Market Domain, Status, Created Date, and Created By. The table contains four rows of data. A red box highlights the table and the search bar above it. A red arrow points to the table with the text 'Market Details'.

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

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.

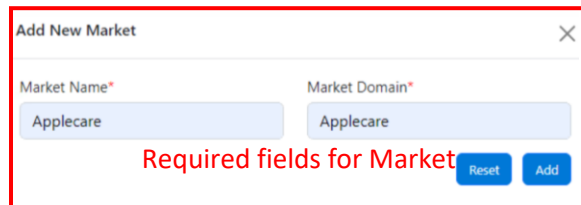
Admin can search, using which admins can get details for a market. Apart from search admin can also add Markets that are associating.

*Steps to add a market*

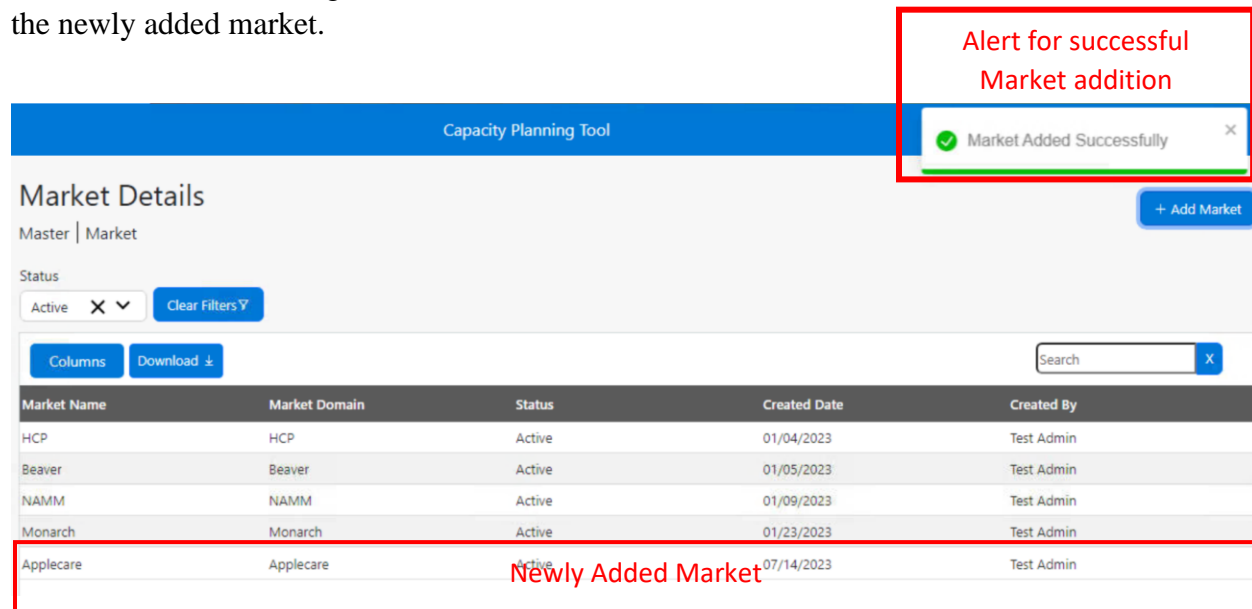
**Step 1:** On the Market Details tab admin can find a button “+ Add Market” available on top right corner below the Username and profile picture. Admin clicks on the button then a form with required fields opens-up.



**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 with the value 'Applecare'. Below the fields is a red text label 'Required fields for Market'. At the bottom right are 'Reset' and 'Add' buttons.

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 'Capacity Planning Tool' header. A blue alert box in the top right corner displays a green checkmark and the text 'Market Added Successfully'. Below the header, the 'Market Details' section has a 'Master | Market' breadcrumb and a '+ Add Market' button. A 'Status' filter is set to 'Active'. Below the filter are 'Columns' and 'Download' buttons. A table lists markets with columns: Market Name, Market Domain, Status, Created Date, and Created By. The table contains five rows, with the last row, 'Applecare', highlighted in red and labeled 'Newly Added Market' in red text.

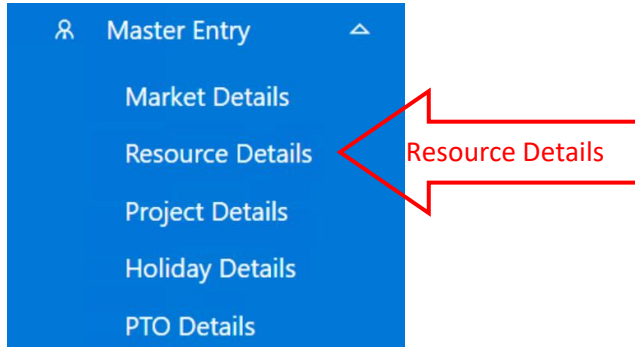
Market Name	Market Domain	Status	Created Date	Created By
HCP	HCP	Active	01/04/2023	Test Admin
Beaver	Beaver	Active	01/05/2023	Test Admin
NAMM	NAMM	Active	01/09/2023	Test Admin
Monarch	Monarch	Active	01/23/2023	Test Admin
Applecare	Applecare	Active	07/14/2023	Test Admin

## 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

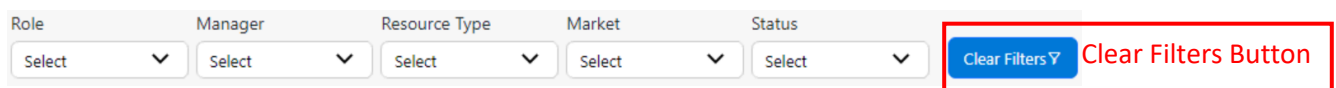


To access Resource Details admin selects Resource Details tab under Master Entry of the sidebar, then it navigates to the following screen.

The screenshot shows the 'Resource Details' page. At the top, there's a header with 'Master | Resource Details' and a '+ Add Resource' button. Below the header are filter dropdowns for Role, Manager, Resource Type, Market, and Status, along with a 'Clear Filters' button. A 'Columns' button and a 'Download' button are also present. The main content is a table with 11 columns: Resource, Role, Email Address, Manager, Resource Type, Market, Location, Sub Location, Status, Created Date, and Created By. The table contains 7 rows of data. A red box highlights the table, and the text 'Resource Details' is overlaid in red.

Resource	Role	Email Address	Manager	Resource Type	Market	Location	Sub Location	Status	Created Date	Created By
Akshay Madan	Developer	user@optum.com	Vipul Suri	GTM	HCP	US	California	Active	05/31/2023	Test Admin
Alexander Roze...	Developer	user@optum.com	Vipul Suri	GTM	HCP	US	California	Active	01/25/2023	Test Admin
Amarendra Bojja	QA	user@optum.com	Sivaruban Vines...	GTM	HCP	US	California	Active	05/31/2023	Test Admin
Amit Singh Cha...	Developer	user@optum.com	Ashish Khare	OGS	HCP	India	Hyderabad	Active	05/31/2023	Test Admin
Anand Pachipala	Developer	user@optum.com	Ashish Khare	GTM	HCP	India	Hyderabad	Active	01/24/2023	Test Admin
Anant Toshniwal	Developer	user@optum.com	Ashish Khare	OGS	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.



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

### Download Selected Columns





## User Manual

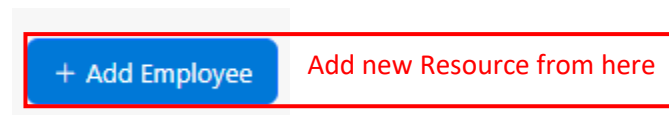
On all the master pages, we have a column dropdown on this screen. It has some already selected selection fields for the columns that are visible on the screen and some fields are unselected but we can filter the columns that we want to download. But, if we don't filter the columns then already selected 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.



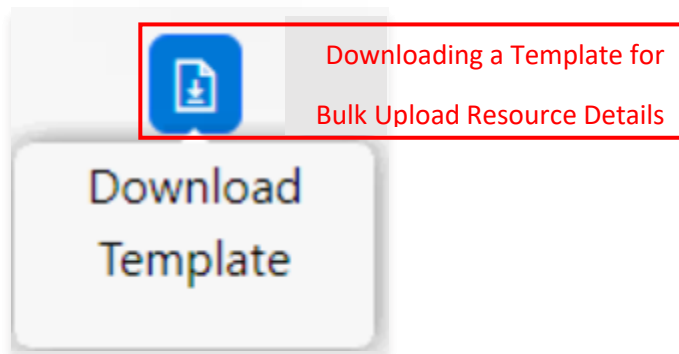
**Step 2:** After filling in all the required fields admin can submit it.

 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, all marked with an asterisk (\*) to indicate they are required. The fields are: "Resource\*", "Role\*" (a dropdown menu with "Select" and a downward arrow), "Email Address", "Manager\*" (a text input field), "Resource Type\*" (a dropdown menu with "Select" and a downward arrow), "Market\*" (a dropdown menu with "Select" and a downward arrow), "Location\*" (a dropdown menu with "Select" and a downward arrow), and "Sub Location\*" (a dropdown menu with "Select" and a downward arrow). There is also a checkbox labeled "Part Time". A red text label "Required fields for Resource" is positioned above the "Reset" and "Add" buttons at the bottom right of the form.

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.

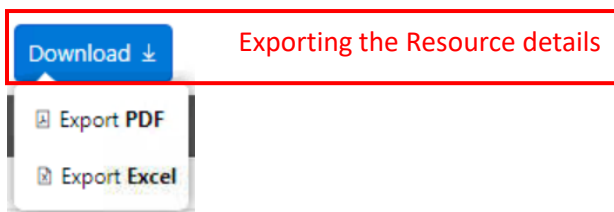
### *Downloading A Template of Resource Details*

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



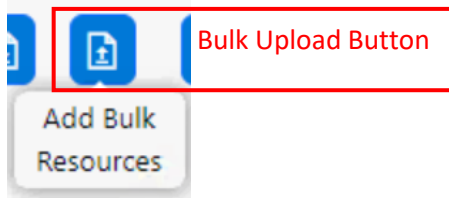
### *Export Resource Details*

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.



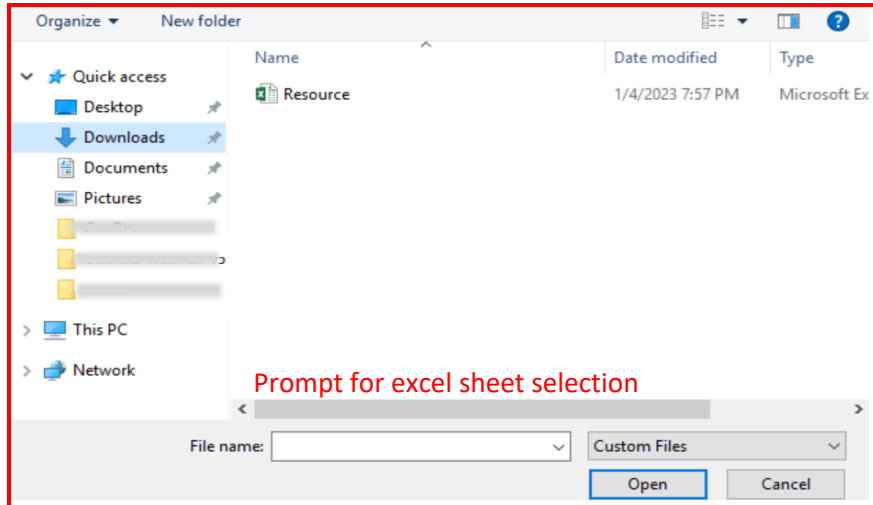
### *Steps for adding Resources' details in bulk:*

**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 screenshot shows the 'Update Resource' form. The form contains the following fields and values:

Field	Value
Resource*	Anand Pachipala
Role*	Developer
Email Address	user@optum.com
Manager*	Ashish Khare
Resource Type*	OGA
Market*	HCP
Location*	India
Sub Location*	Hyderabad
Status	Active

At the bottom of the form, there are two buttons: 'Update' and 'Delete'.

Resources details that can be updated

## 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

Resource Updated Successfully

Capacity Planning Tool

Resource Details

Master | Resource Details

Role

Manager

Resource Type

Market

Status

Select

Select

Select

Select

Active

Clear Filters

Columns

Download

Search

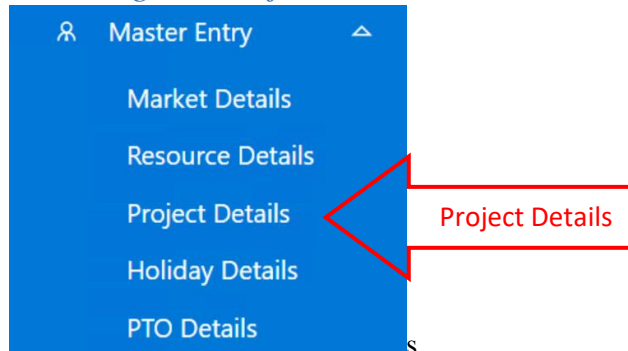
Resource	Role	Manager	Resource Type	Market	Location	Sub Location	Status	Created Date	Created By
Ajay Singh	Developer	Ashish Khare	OGA	HCP	India	Noida	InActive	01/24/2023	Test Admin
Akshay Madan	Developer	Vipul Suri	GTM	HCP	US	California	InActive	05/31/2023	Test Admin
Alexander Rozen...	Developer	Vipul Suri	GTM	HCP	US	California	InActive	01/25/2023	Test Admin
Amarendra Bojja	QA	Sivaruban Vinesp...	GTM	HCP	US	California	InActive	05/31/2023	Test Admin
Amit Singh Chau...	Developer	Ashish Khare	OGA	HCP	India	Hyderabad	InActive	05/31/2023	Test Admin
Anand Pachipala	Developer	Ashish Khare	OGA	HCP	India	Hyderabad	InActive	01/24/2023	Test Admin
Anant Toshniwal	Developer	Ashish Khare	OGA	HCP	India	Noida	InActive	01/24/2023	Test Admin
Andrey Zagaynov	Developer	Vipul Suri	GTM	HCP	US	California	InActive	01/24/2023	Test Admin
Anindita Talukdar	Developer	Ashish Khare	OGA	HCP	India	Noida	InActive	01/25/2023	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.

The Project Details screen displays a table of project information. The table has columns: Project Code, Project Name, Project Model, Project Market, Project Manager, Expense Type, Status, Created Date, and Created By. The table contains 10 rows of data. A red box highlights the table, and a red arrow points from the text 'Project Details' to the table.

Project Code	Project Name	Project Model	Project Market	Project Manager	Expense Type	Status	Created Date	Created By
PRJ0010550	AppleCare Migratio...	Agile	HCP		CAPEX	Active	01/09/2023	Test Admin
PRJ0010052	CURO Medical Man...	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 Su...	Agile	HCP		OPEX	Active	01/09/2023	Test Admin
PRJ0010012	KLO Application Su...	Agile	HCP		OPEX	Active	01/25/2023	Test Admin
PRJ0010012	KLO Application Su...	Agile	HCP		OPEX	Active	01/25/2023	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.

The filter section of the Project Details screen shows four dropdown menus for Project Model, Project Market, Expense Type, and Status. A red box highlights the 'Clear Filters' button and the text '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.*

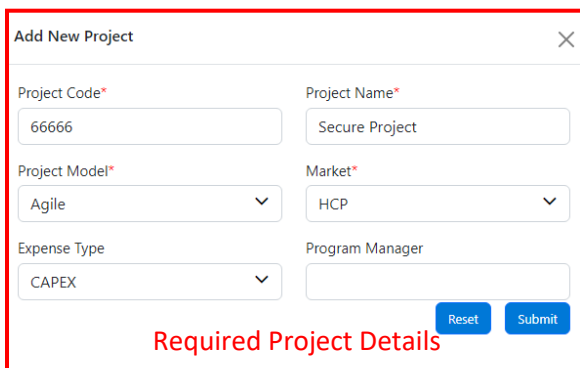
1. Admin can see details related to projects
2. Admin can see a list of projects and the list can be filtered as well based on different filters namely
  - a. Project Model
  - b. Market
  - c. Expense Type
  - d. Status
3. Admin can also search a project.
4. Adding Project Detail
5. Editing Project Detail

*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) in the top right corner. It contains several input fields: 'Project Code\*' with the value '66666', 'Project Name\*' with the value 'Secure Project', 'Project Model\*' with a dropdown menu showing 'Agile', 'Market\*' with a dropdown menu showing 'HCP', 'Expense Type' with a dropdown menu showing 'CAPEX', and 'Program Manager' which is empty. At the bottom right of the form are 'Reset' and 'Submit' 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	Program Manager	Expense Type	Status	Created Date	Created By
PRJ0010593	Internet Explorer En...	Agile	HCP	Ashish Khare	CAPEX	Active	2023-01-25	Test Admin
12121	AllScripts (QA)	Agile	HCP	Leslie Kiheri	CAPEX	Active	2023-01-09	Test Admin
22222	Open VMS	Agile	HCP	Shriyans Sharma	CAPEX	Active	2023-01-25	Test Admin
33333	GitHub	Agile	HCP		CAPEX	Active	2023-01-25	Test Admin
44444	Management	Agile	HCP	Ashish Khare	CAPEX	Active	2023-01-25	Test Admin
55555	Security	Agile	HCP		CAPEX	Active	2023-01-09	Test Admin
66666	Secure Project	Agile	HCP		CAPEX	Active	2023-01-09	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.

Update Project

Project Code\*  
12121

Project Name\*  
AllScripts (QA)

Project Model\*  
Agile

Market\*  
HCP

Expense Type  
CAPEX

Project Manager  
Leslie Kiheri

Status  
InActive

Update Delete

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

Capacity Planning Tool

Project Details

Master | Project Info

Project Model Project Market Expense Type Status

Select Select Select Select Clear Filters

Columns Download

Search

Project Code	Project Name	Project Model	Project Market	Project Manager	Expense Type	Status	Created Date	Created By
12121	AllScripts (QA)	Agile	HCP		CAPEX	InActive	01/09/2023	Test Admin
PRJ0010550	AppleCare Migratio...	Agile	HCP		CAPEX	Active	01/09/2023	Test Admin
PRJ0010558	CA – Claims Quality ...	Agile	HCP		CAPEX	InActive	01/25/2023	Test Admin
PRJ0010048	CA – Region Provid...	Agile	HCP		CAPEX	InActive	01/24/2023	Test Admin
99999	COP Upgrade	Agile	HCP		CAPEX	InActive	07/26/2023	Leslie Kiheri
PRJ0010052	CURO Medical Man...	Agile	HCP		CAPEX	Active	01/19/2023	Test Admin
PRJ0010557	Cap Rev: AppleCare ...	Agile	HCP		CAPEX	InActive	01/09/2023	Test Admin
77777	DRR	Agile	HCP		CAPEX	InActive	07/26/2023	Leslie Kiheri
PRJ0010077	Data Fabric RFP	Agile	HCP		CAPEX	Active	01/19/2023	Test Admin

Updated Details

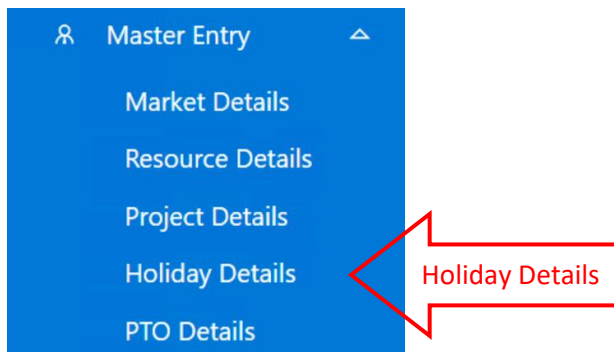
## User Manual

## Holiday Details

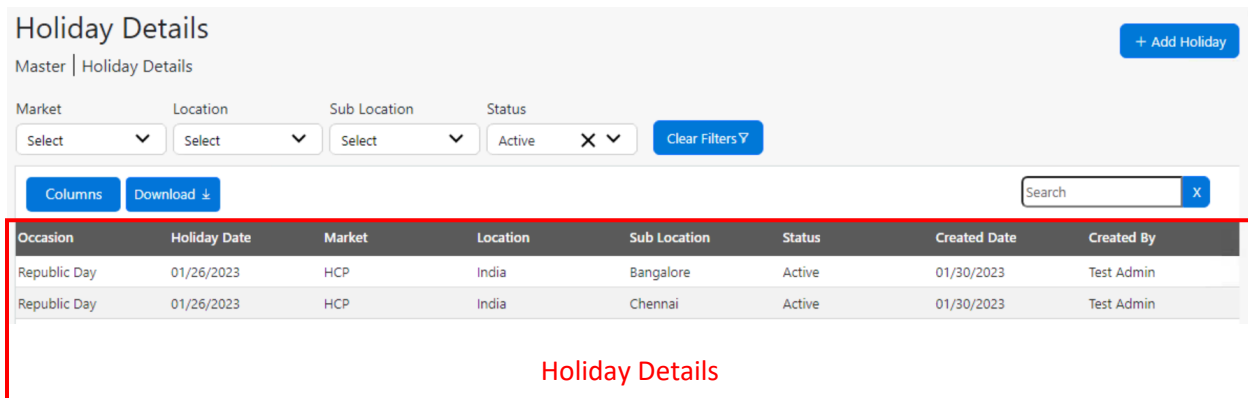
This screen provides capability to manage holidays, it provides details like market, location, and other details applicable for a particular holiday.

### *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.



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.



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*

**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.

 A form titled 'Add New Holiday' with a close button (X) in the top right. It contains several input fields: 'Occasion\*' with a text input containing 'Republic Day'; 'Holiday Date\*' with a date picker showing '01/26/2023'; 'Market\*' with a dropdown menu showing 'HCP'; 'Location\*' with a dropdown menu showing 'India'; and 'Sub Location\*' with a dropdown menu showing 'Gurgaon'. At the bottom, there are 'Reset' and 'Add' buttons. A red text label 'Holiday required fields' is positioned above the 'Add' button. The entire form is enclosed in a red rectangular border.

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	2023-01-05	HCP	US	California	InActive	2023-01-30	Test Admin
Martin Luther King Jr. ...	2023-01-16	HCP	US	California	Active	2023-01-30	Test Admin
Republic Day	2023-01-26	HCP	India	Bangalore	Active	2023-01-30	Test Admin
Republic Day	2023-01-26	HCP	India	Chennai	Active	2023-01-30	Test Admin
Republic Day	2023-01-26	HCP	India	Gurgaon	Active	2023-01-30	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\*

Holi

Holiday Date\*

03/04/2023

×

📅

Market\*

NAMM

▼

Location\*

India

▼

Sub Location\*

Gurgaon

▼

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.

Capacity Planning Tool

Alert on Update

✓ Holiday Updated Successfully

×

Market

Location

Sub Location

Status

Select

Select

Select

Active, InA...

×

▼

Clear Filters

Columns

Download

Search

×

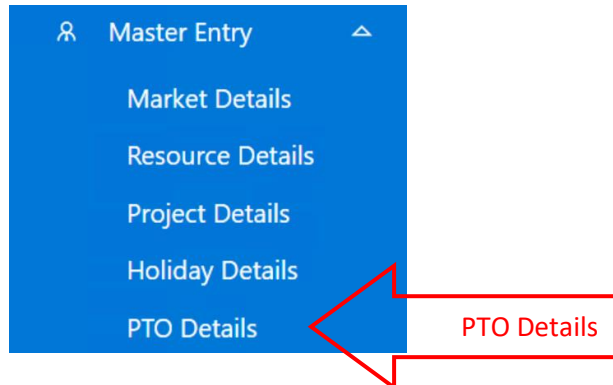
Occasion	Holiday Date	Market	Location	Sub Location	Status	Created Date	Created By
Test Holiday	01/04/2023	HCP	US	California	InActive	06/16/2023	Leslie Kiheri
New Year's Day	01/05/2023	HCP	US	California	InActive	01/30/2023	Test Admin
Martin Luther King Jr. ...	01/16/2023	HCP	US	California	InActive	01/30/2023	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	03/05/2023	NAMM	India	Gurgaon	Active	01/30/2023	Test Admin

Updated Holiday

## 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** + Add PTO

Master | PTO

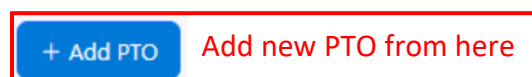
Resource: Select Manager: Select PTO Type: Select Month: Select Year: Select Status: Active X Clear Filters

Columns Download

Resource	Resource Manager	PTO Type	Start Date	End Date	Number of Days	Status	Created Date	Created By
Paul Kieu	Vipul Suri	PTO	05/04/2023	05/26/2023	17	Active	05/31/2023	Test Admin
Leslie Kiheri	Vipul Suri	PTO	05/05/2023	05/11/2023	5	Active	05/31/2023	Test Admin
Sreedevi Akula	Sivaruban Vinespar...	PTO	05/02/2023	05/03/2023	2	Active	05/31/2023	Test Admin
Uday Kumar Keesara	Ashish Khare	PTO	05/04/2023	05/04/2023	1	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

Remarks

Half Day

No. Of Days\*

12

Reset

Add

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

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
Paul Kieu	Vipul Suri	PTO	05/04/2023	05/26/2023	17	Active	05/31/2023	Test Admin
Leslie Kiheri	Vipul Suri	PTO	05/05/2023	05/11/2023	5	Active	05/31/2023	Test Admin
Sreedevi Akula	Sivaruban Vinespar...	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
Anuj Khanna	Vipul Suri	PTO	05/04/2023	05/19/2023	12	Active	05/31/2023	Test Admin

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

Remarks

NA

Half Day

No. Of Days\*

2

Status

Active

Update

Delete

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

PTO details fields

## User Manual

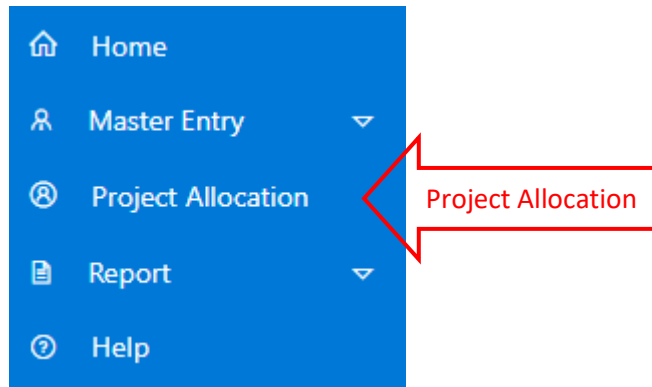
For valid filled in details PTO would be updated successfully, admin get a notification and updated PTO can be seen on the PTO details screen.

Resource	Resource Man...	PTO Type	Start Date	End Date	Number of Days	Remarks	Status	Created Date	Created By
Paul Kieu	Vipul Suri	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
Sreedevi Akula	Sivaruban Vinesp...	PTO	05/02/2023	05/03/2023	2	Sick Leave	Active	05/31/2023	Test Admin
Uday Kumar Kees...	Ashish Khare	PTO	05/04/2023	05/05/2023	2	NA	Active	05/31/2023	Test Admin

Updated PTO

## 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 More Filters

Columns Download Search

Resource	Resource Type	Role	Supervisor	Location	Resource Market
> Ajay Singh	OGS	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	OGS	Developer	Ashish Khare	India	HCP
> Anand Pachipala	OGS	Developer	Ashish Khare	India	HCP
> Anant Toshniwal	OGS	Developer	Ashish Khare	India	HCP
> Andrey Zagaynov	GTM	Developer	Vipul Suri	US	HCP
> Anindita Talukdar	OGS	Developer	Ashish Khare	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
05/01/2023	05/31/2023	Developer	0	1	84	50	Active	05/01/2023	Test Admin	
04/01/2023	04/30/2023	Developer	0	0	84	50	Active	04/01/2023	Test Admin	
03/01/2023	03/31/2023	Developer	0	0	92	50	Active	07/11/2023	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: Select, Resource Type: Select, Role: Select, Supervisor: Select, Location: Select, Resource Market: Select, Status: Active X, Project: Select, Project Market: Select, Expense Type: Select, Allocation Start Date: MM/DD/YYYY x, Allocation End Date: MM/DD/YYYY x.

Clear Filters, Hide Filters

Clear Filters Button, 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 Market: Select, Expense Type: Select, Allocation Start Date: mm/dd/yyyy x, Allocation End Date: 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  
OGS

Role  
Developer

Supervisor  
Ashish Khare

Location  
India

Resource Market  
HCP

Project\*  
KLO CapRev

Resource Type 1  
OGS

Project Market  
HCP

PPSID  
PRJ0010012

Expense Type  
OPEX

Allocation Start Date\*  
04/01/2023

Allocation End Date\*  
04/30/2023

Holidays  
0

PTO Days  
0

Allocation(Percentage)\*  
100

Allocation Hours Per Day  
8.5

Allocation(Hours)  
168

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	OGS	Developer	Ashish Khare	India	HCP				
Project Name ▲							Project Code	Project Market	Project Manager	Expense Type
➤	KLO Application Support		PRJ0010012		HCP		Leslie Kiheri		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
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				Active	04/01/2023	Test Admin	

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

India

Resource Market

HCP

Project\*

CURO Medical Management Imple...

Project Role\*

Developer

Project Market

HCP

PPSID

PRJ0010052

Expense Type

CAPEX

Allocation Start Date\*

12/01/2022

Allocation End Date\*

12/31/2022

PTO Days

0

Holidays

0

Allocation Hours Per Day

8

Allocation(Percentage) Allocated : 100\*

200

Allocation(Hours)\*

35.2

Status

Active

Delete

Update

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	India	HCP				
Project Name ▲		Project Code		Project Market		Project Manager		Expense Type		
▼	CURO Medical Management Imple...			PRJ0010052		HCP		Rajani Malik		CAPEX
Start Date ▼	End Date	Project Role	PTO Days	Holidays	Allocation(H...	Allocation P...	Status	Created Date	Created By	Updated Date
04/01/2023	04/30/2023	Developer	10	0	8	10	Active	04/01/2023	Test Admin	06/01/2023
03/01/2023	03/31/2023	Developer	0	1	18	10	Active	07/12/2023	Leslie Kiheri	
02/01/2023	02/28/2023	Developer	0	0	16	10	Active	07/12/2023	Leslie Kiheri	
01/01/2023	01/31/2023	Developer	0	1	17	10	Active	01/27/2023	Test Admin	01/27/2023
12/01/2022	12/31/2022	Developer	0	0			Active	01/27/2023	Test Admin	07/14/2023

Updated Project

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

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

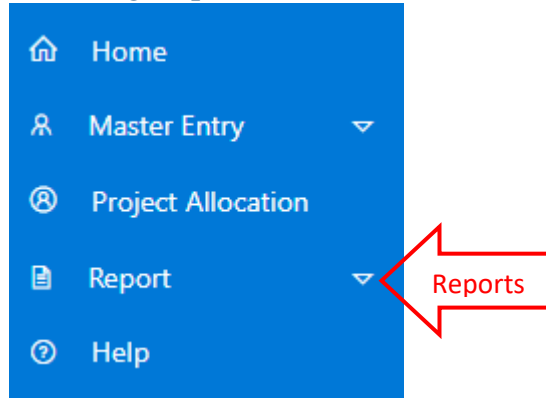
$$\text{Allocation hours} = \text{total working days} * \text{allocation hours per day} * \text{allocation percentage}$$

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.

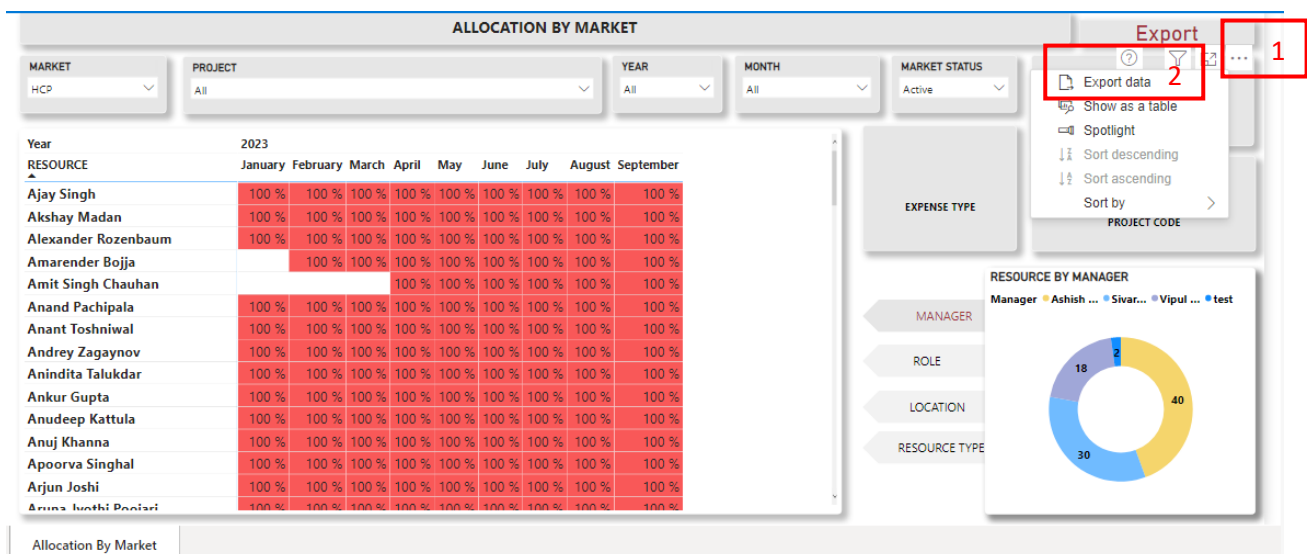
### Accessing Reports Screen



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

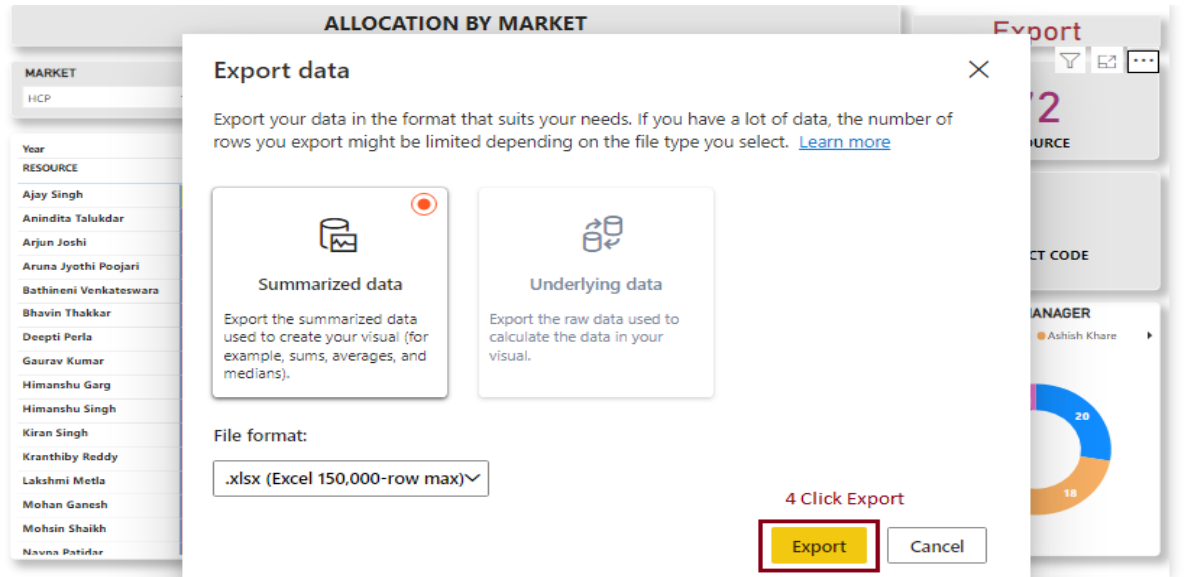
**Step 1:** Hover over the “Export visual”

## User Manual

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

**Step 3:** Select “Export data”

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

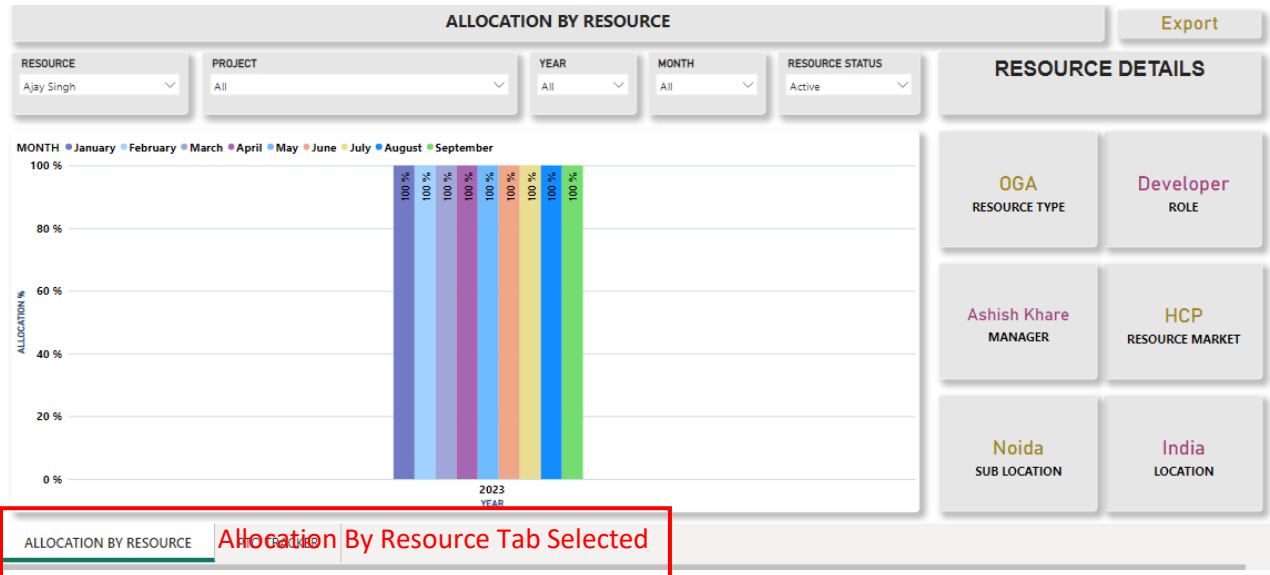


### Allocation By Resource & PTO Tracker

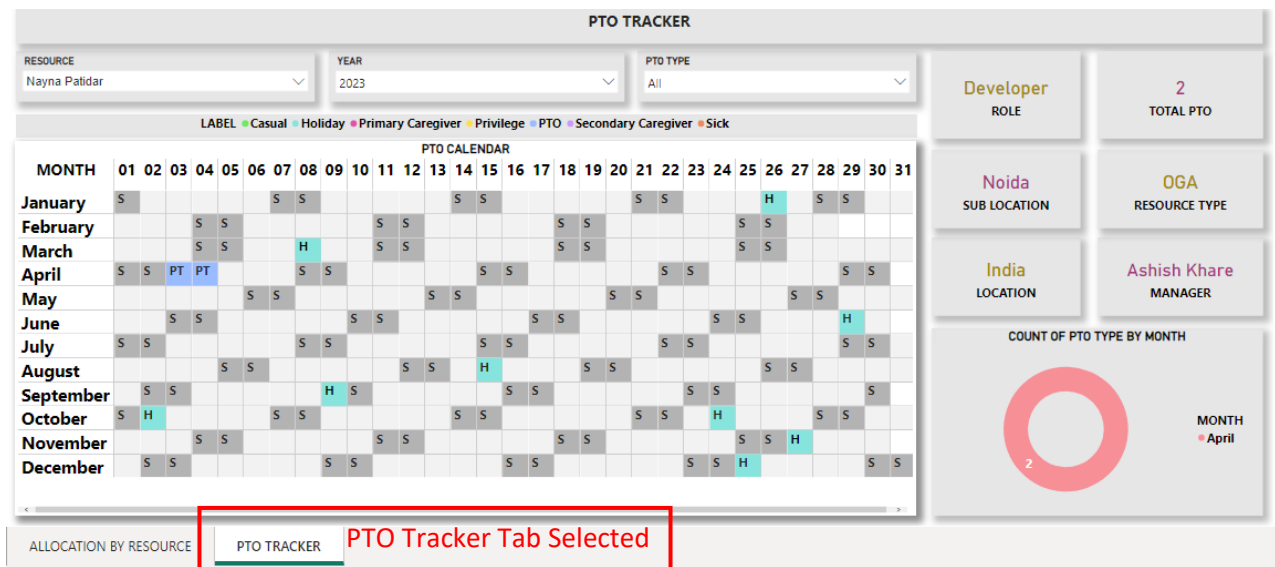
This Report contains 2 tabs which is present at the bottom of the report. One contains the Allocation By Resource and other one contains the PTO details for all the resources.

**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



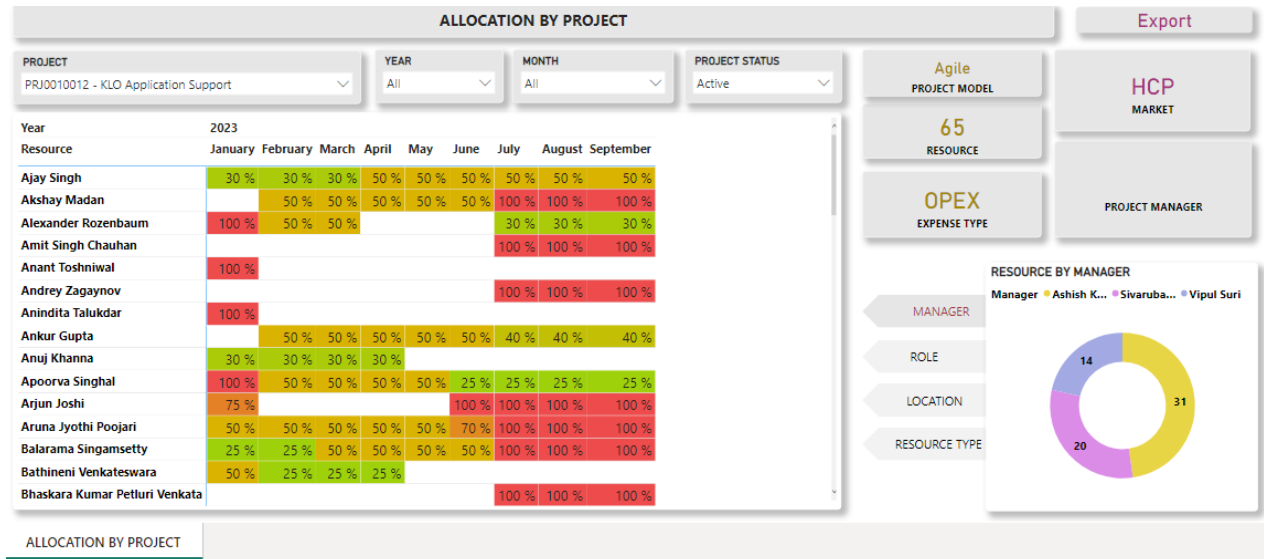
**PTO Tracker Tab** contains the three dropdowns namely the Resource, Year and PTO Type. On the right-hand side of the report, there is detail related to the resource and the Total PTO card for displaying the total PTO taken in this year by a particular resource. At the bottom right corner, there is 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'.



## User Manual

## 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.



## 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 Chaturthi	19	September	2023
Mahatma Gandhi Jayanti	2	October	2023
Dussehra / Vijaydashami	24	October	2023
Karnataka / Haryana Formation Days	1	November	2023
Guru Nanak Birthday	27	November	2023
Christmas	25	December	2023

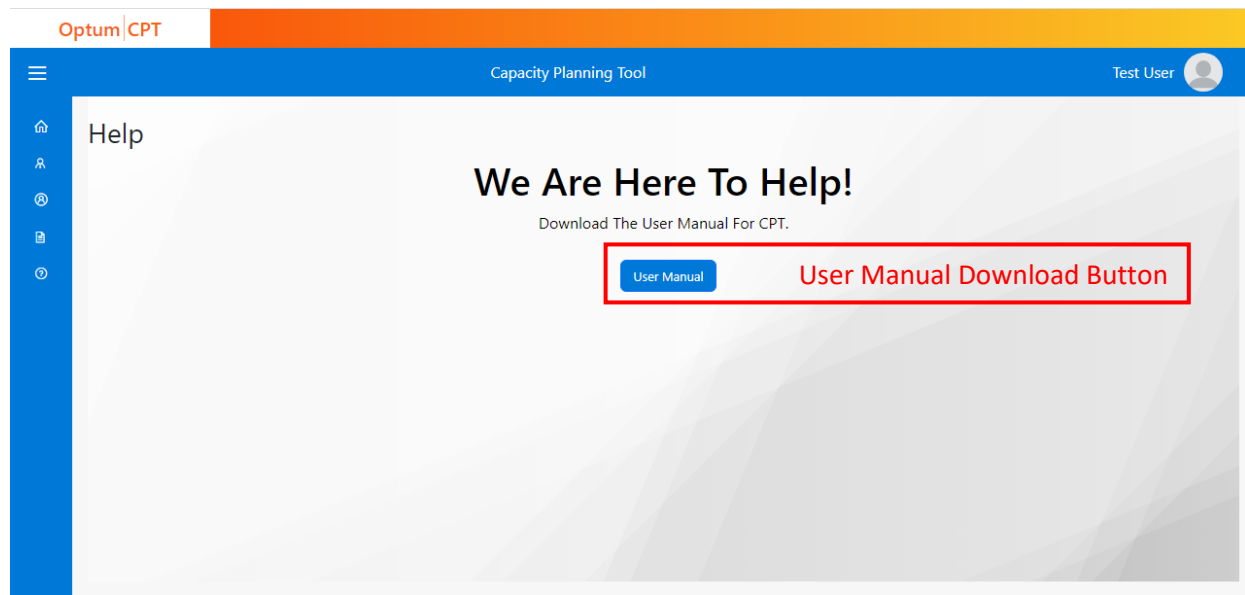
Filters: Search | Filters on this page: HolidayDate - Year is (All)



## User Manual

## 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.

