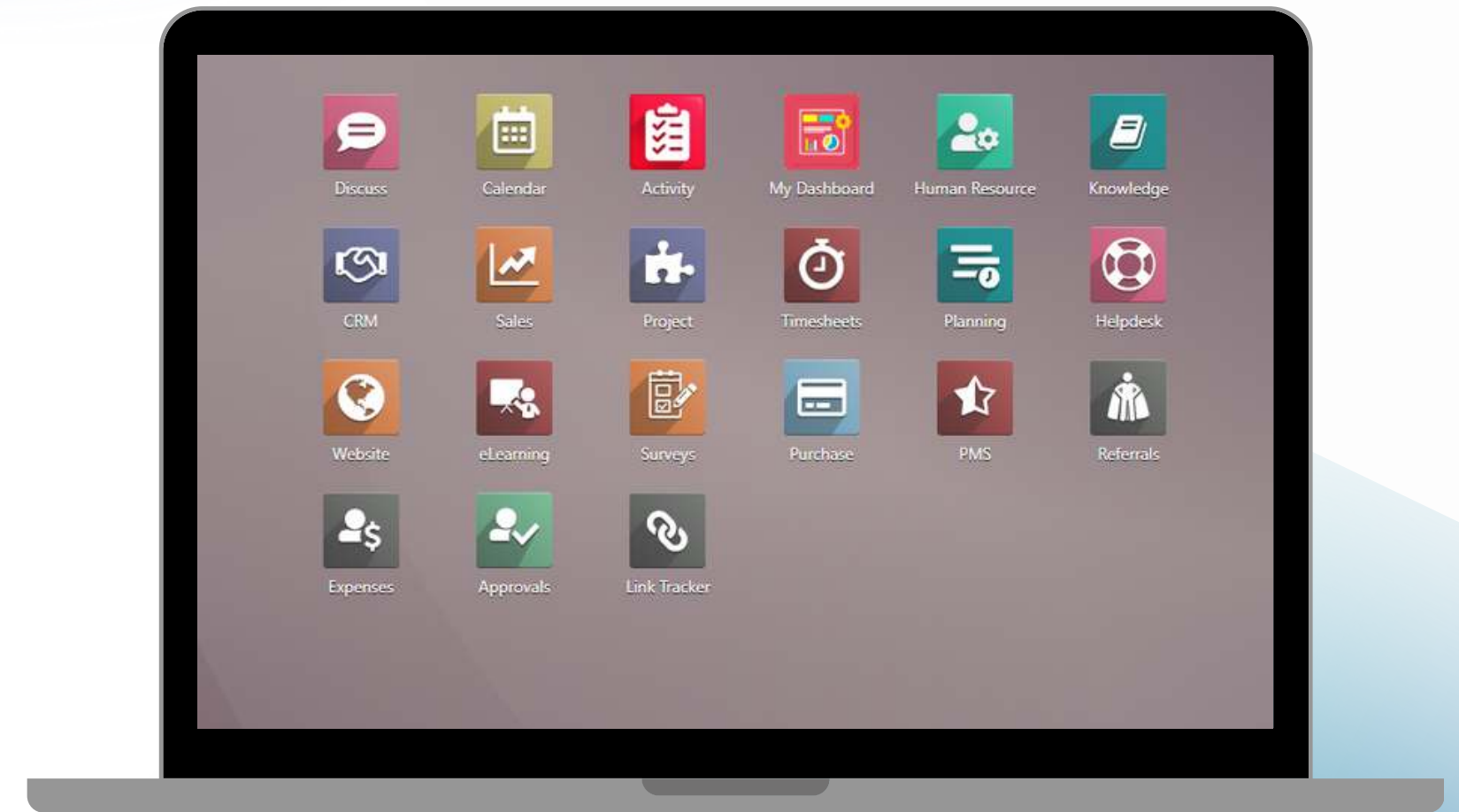


USER GUIDE QALBU MODUL PLANNING

Qalbu - Change Management Team

PT JUKE SOLUSI TEKLOGI



AGENDA

1 Introduction Modul Planning

2 Pengisian Survey

3 Penjelasan Materi

4 Q & A

Membuat Planning? Bagiku itu sangat mudah

Sarah adalah seorang manajer yang selalu menggunakan modul planning untuk menganalisis alokasi tim, membuat perencanaan alokasi resource dan mengorganisir work load tim. Hal tersebut dapat memudahkan Sarah selama bekerja untuk melakukan planning



1 Melihat Status Opportunity dan Project

Setiap pagi Sarah akan melihat *opportunity* dan *project* yang sudah masuk dalam stage COMMIT dan WON melalui **Aplikasi Qalbu**

2 Ide Planning

Sesampainya di kantor, Sarah melakukan analisis menggunakan **Gantt Chart** untuk melihat alokasi resource hingga penjadwalan resource agar memudahkannya dalam membuat planning untuk opty dan project baru

5 Monitoring

Dengan data yang sudah ada di aplikasi dan rutinitas update data yang selalu ia lakukan, Sarah tidak pernah khawatir ketika harus melakukan laporan dadakan ke atasan hingga mengambil keputusan yang tepat

Berhasil Membuat Planning

Setelah mendapatkan hasil analisis, Sarah segera menuangkan idenya ke **Modul Planning** dengan mengisi berbagai informasi yang dibutuhkan. **Sarah berhasil membuat planning**

4 Tercepat Dalam Mengupdate ke Tim

Sarah memiliki tim yang bekerja remote sehingga untuk menginfokan ke tim dengan cepat tanpa perlu bertemu, ia menggunakan fitur **Publish & Send** agar planning yang sudah ia buat dapat dilihat oleh seluruh tim dan atasannya dengan mudah

“Mulai Gunakan Qalbu – Modul Planning Untuk Memudahkanmu Pekerjaanmu”

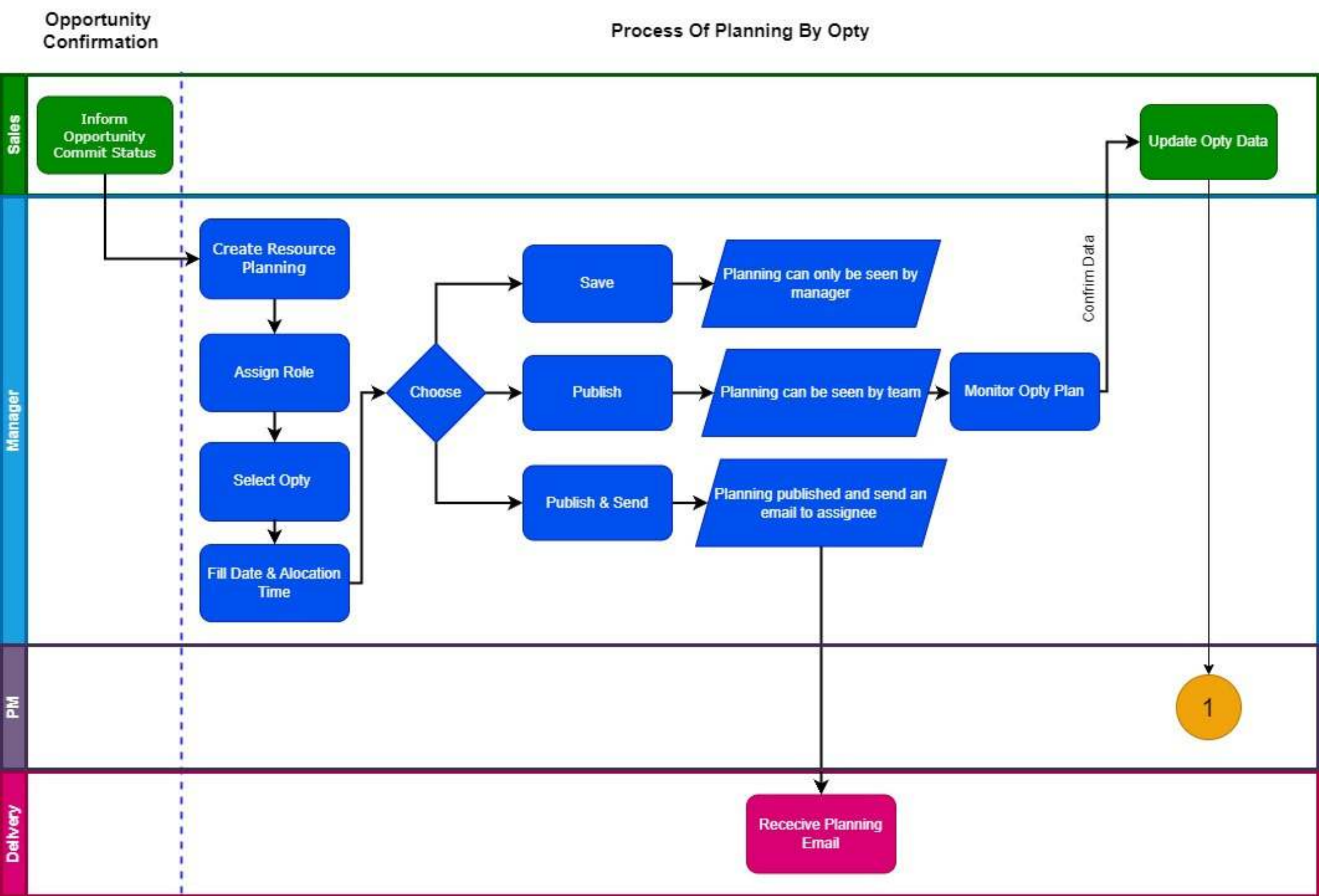


Ikuti Manajer Sarah untuk membuat Planning di QALBU – Modul Planning

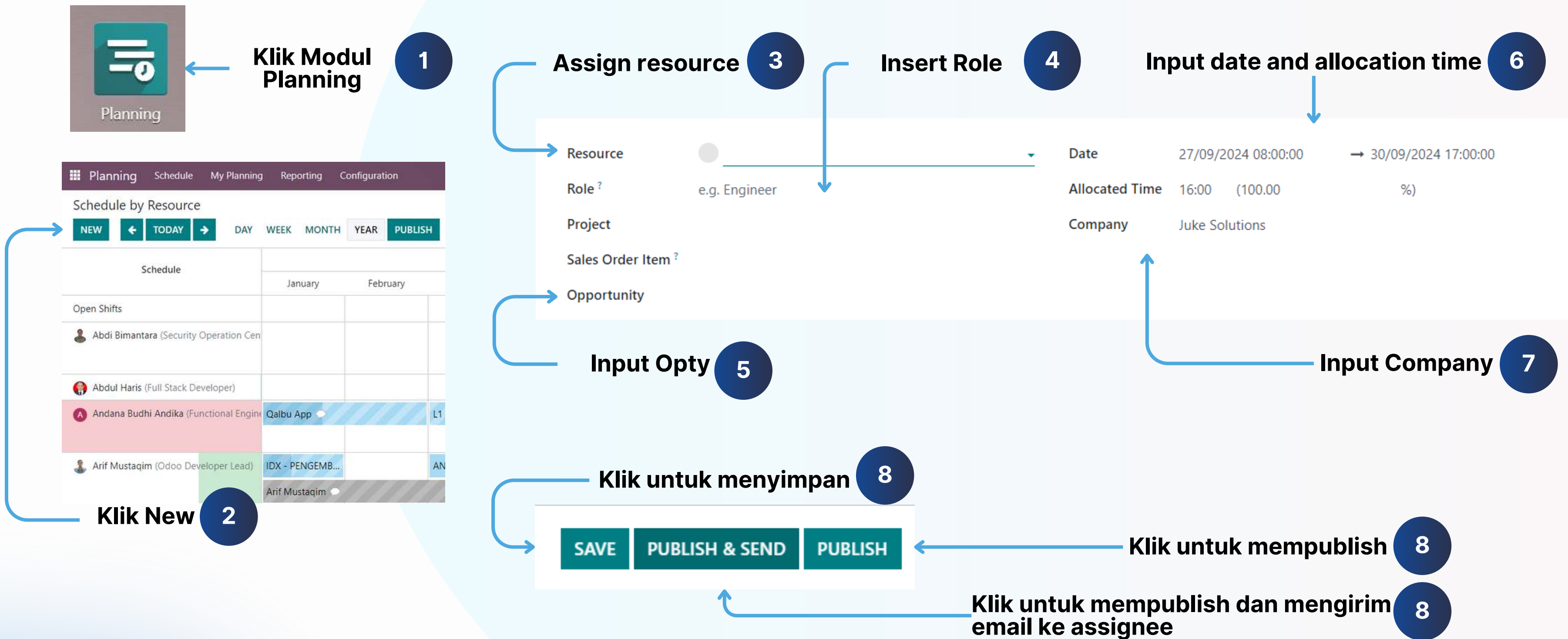


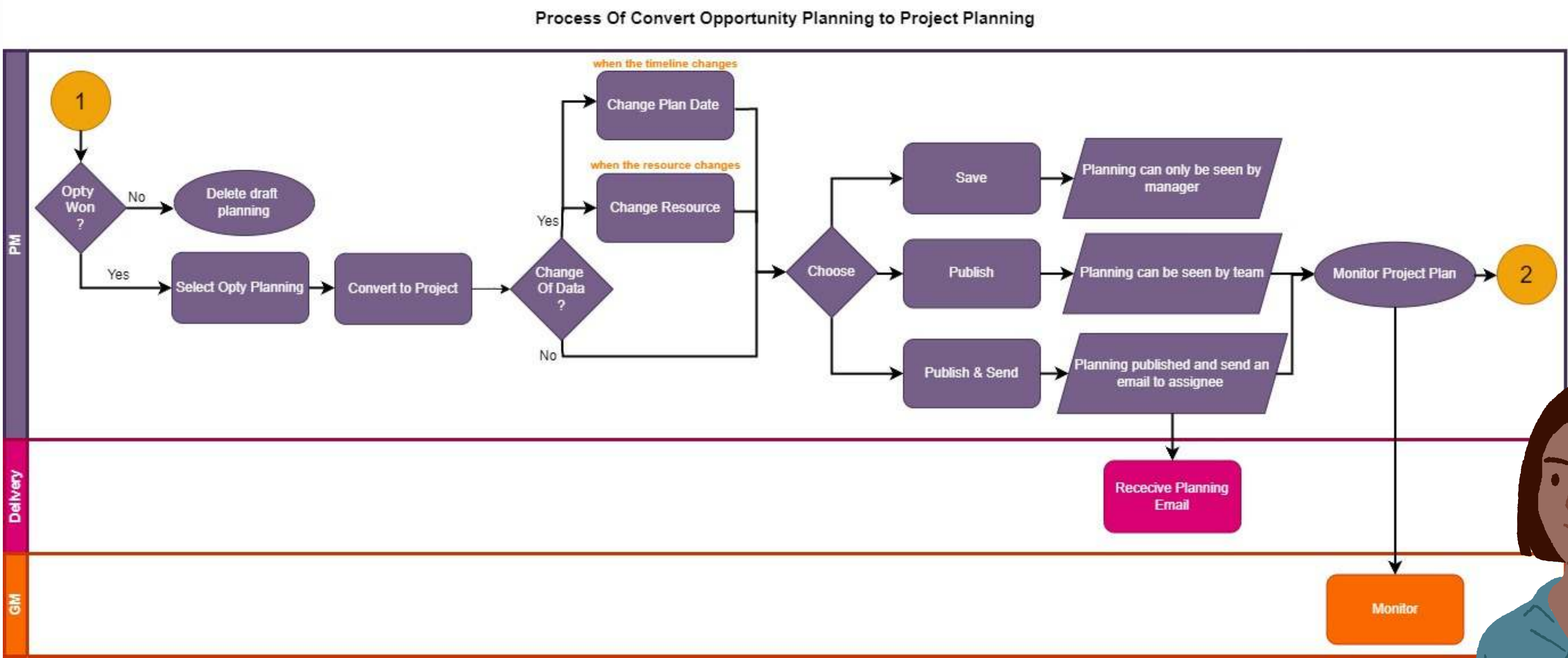


Ikuti Manajer Sarah untuk membuat Planning dari Opportunity yang sudah Commit



Create Planning From Commit Opportunity





Project Manager akan melakukan convert opportunity planning to project planning



Convert Opportunity Planning to Project Planning

Klik Opty 11

Surianata (Odoo Devel [x] Odoo - RS Mata Achmad

Odoo - PT. Suhardjono Digital Teknologi's opportunity

Resource		Date	14/11/2024 08:00:00 → 29/11
Role?	Oppty - BA	Allocated Time	96:00 (100.00)
Sales Order Item?		Company	Juke Solutions
Opportunity	Odoo - PT. Suhardjono Digital Teknologi's oppo		
Repeat?	☐		
Save as Template	☐		
Additional note sent to the employee			

Klik Convert to Project 12

SAVE PUBLISH & SEND PUBLISH I TAKE IT DISCARD CONVERT TO PROJECT

[x] Odoo - RS Mata Achmad Wardi's opportunity - S00943 - Service Odoo Implementation

\$ Sales Order 00:00 Ho... Recorded

Resource	Trheamadiazalsa Surianata	Date	11/12/2023 00:00:00 → 29/02/2024 00:00:00
Role?	ERP - Developer (Project)	Allocated Time	448:00 (101.82 %)
Project	ANTI VIRUS - ANGKASA PURA 1	Company	Juke Solutions
Sales Order Item?	S00943 - Service Odoo Implementation		
Repeat?	☐		
Save as Template	☐		
Kisel - Top Up Mandays			

Jika ada perubahan timeline, ubah date dan allocation time

 13

Repeat berfungsi untuk menjadwalkan shift atau tugas yang berulang hanya di satu waktu tertentu secara otomatis

 14

Save as Template berfungsi untuk menyimpan Role, Project, Date, dan Allocated Time sebagai template

 15

Klik untuk menyimpan

 16

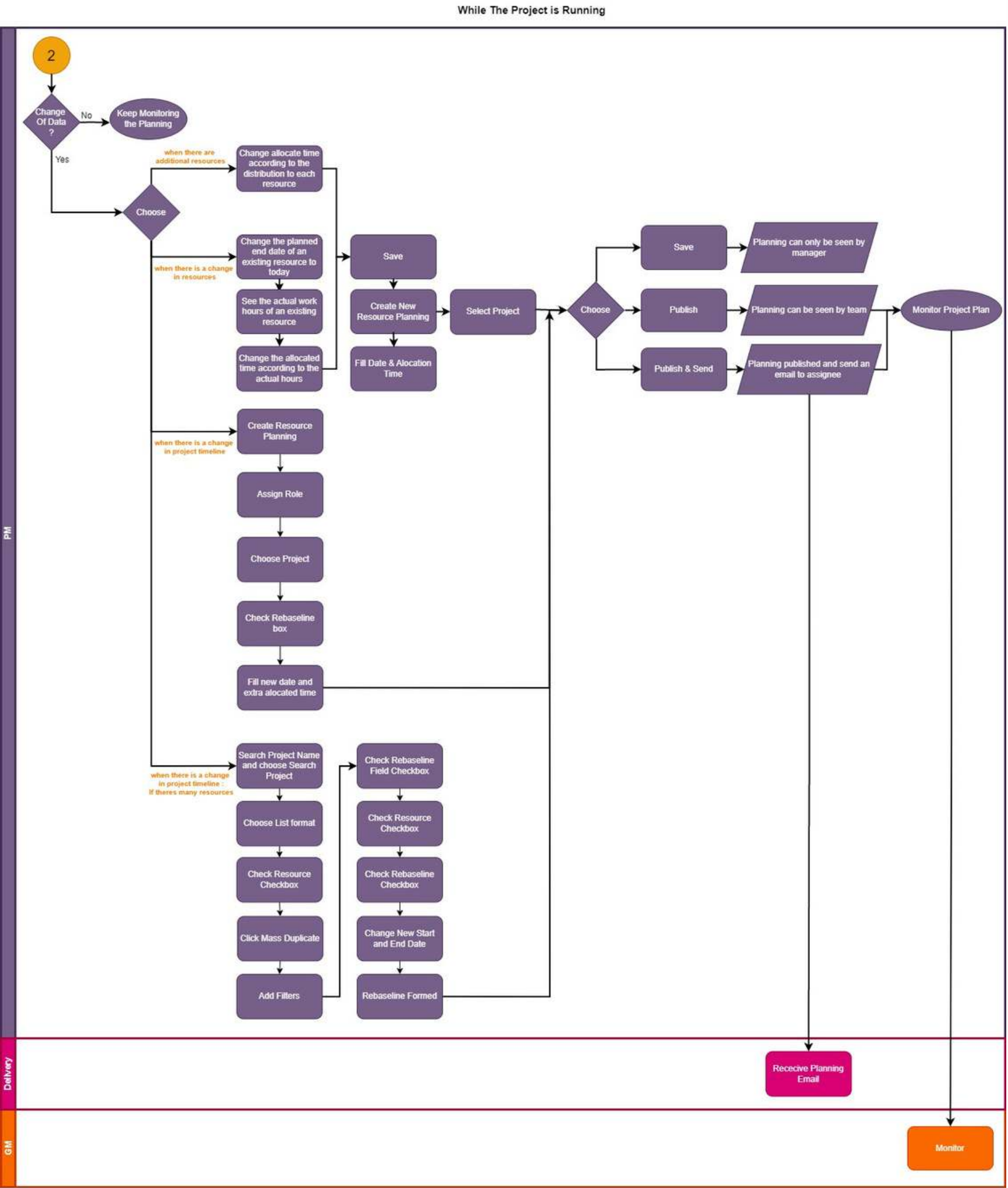
Klik untuk mempublish

 16

SAVE PUBLISH & SEND PUBLISH

Klik untuk mempublish dan mengirim email ke assignee

 16



Apabila terdapat perubahan ketika project sudah berjalan, Project Manager selalu melakukan update data



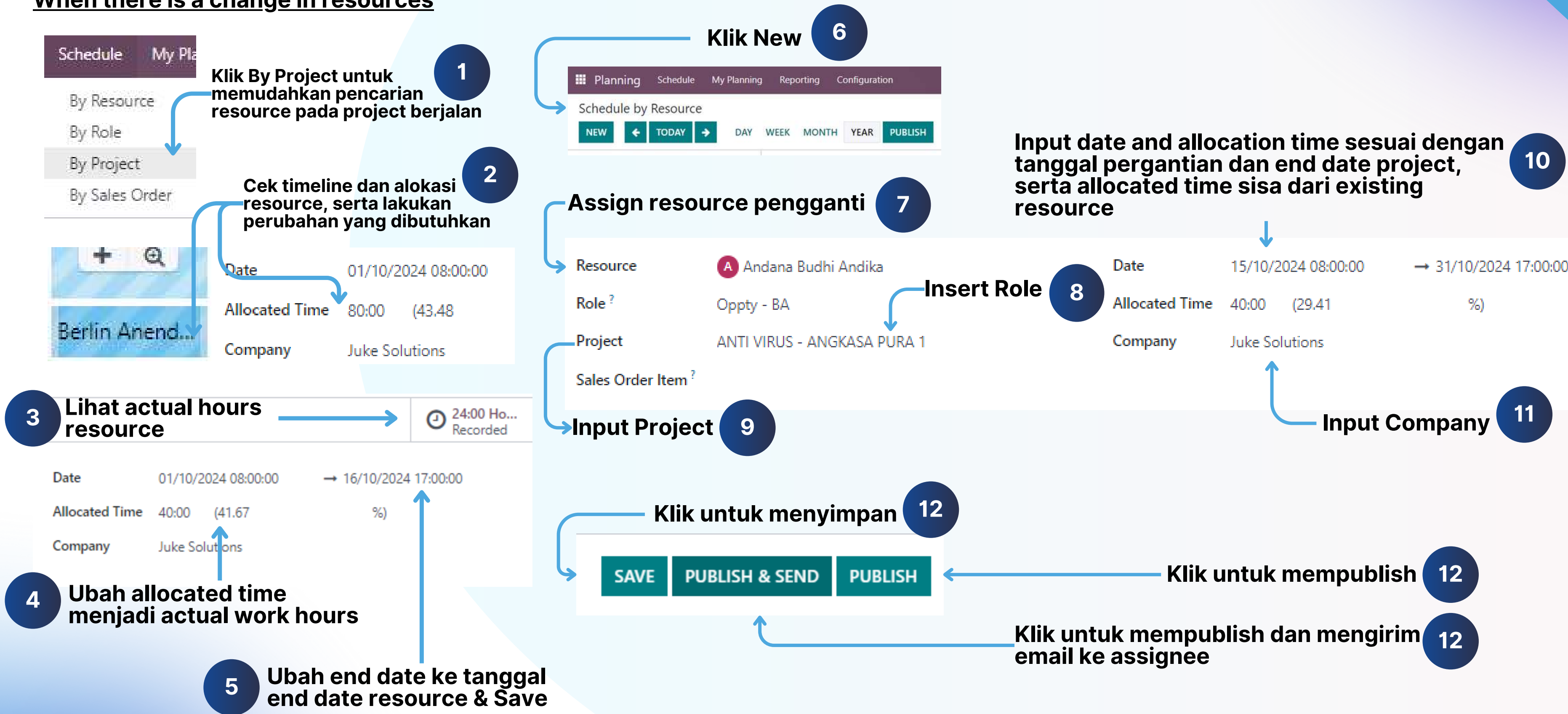
Change Data While Project is Running

When there are additional resources



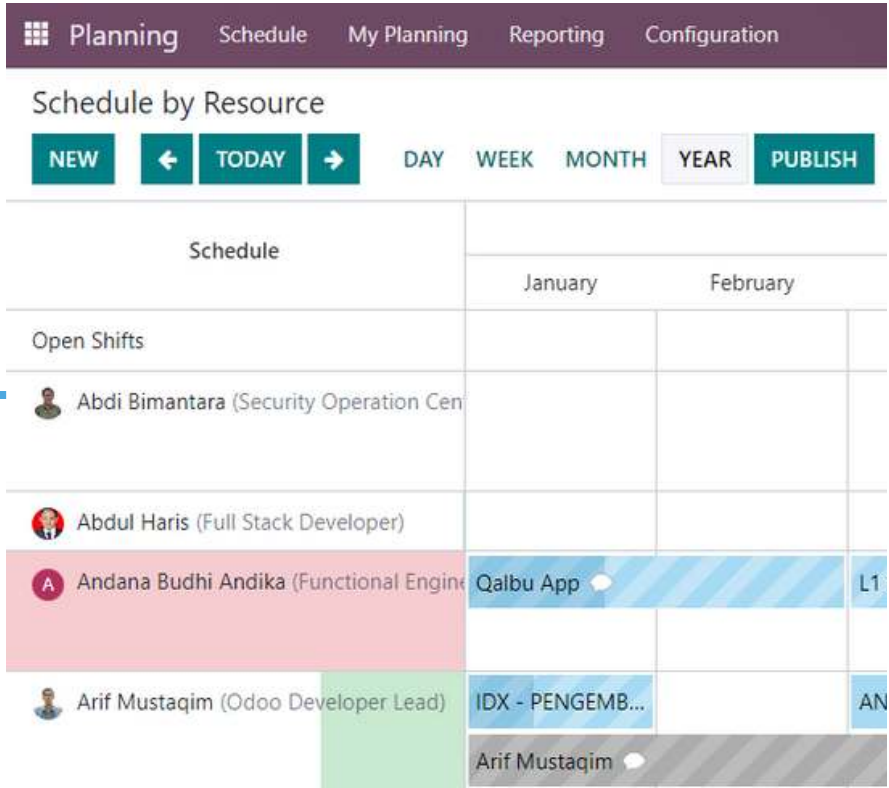
Change Data While Project is Running

When there is a change in resources

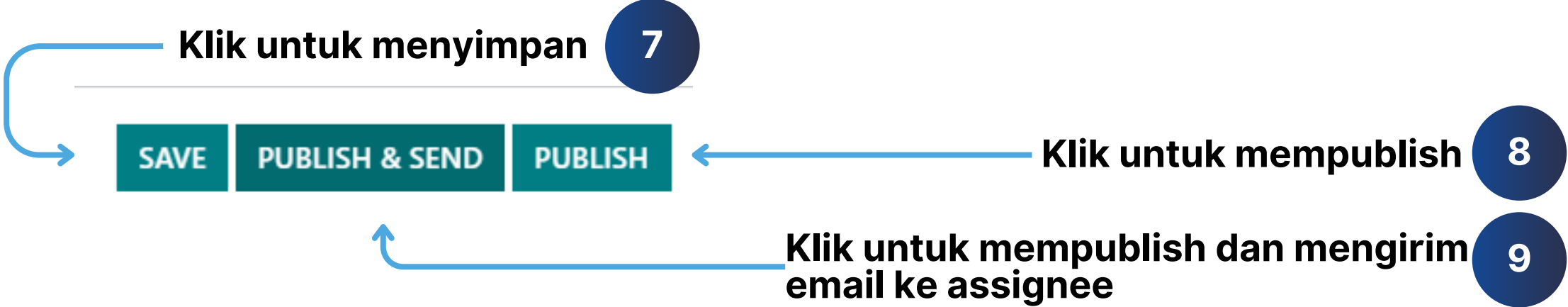
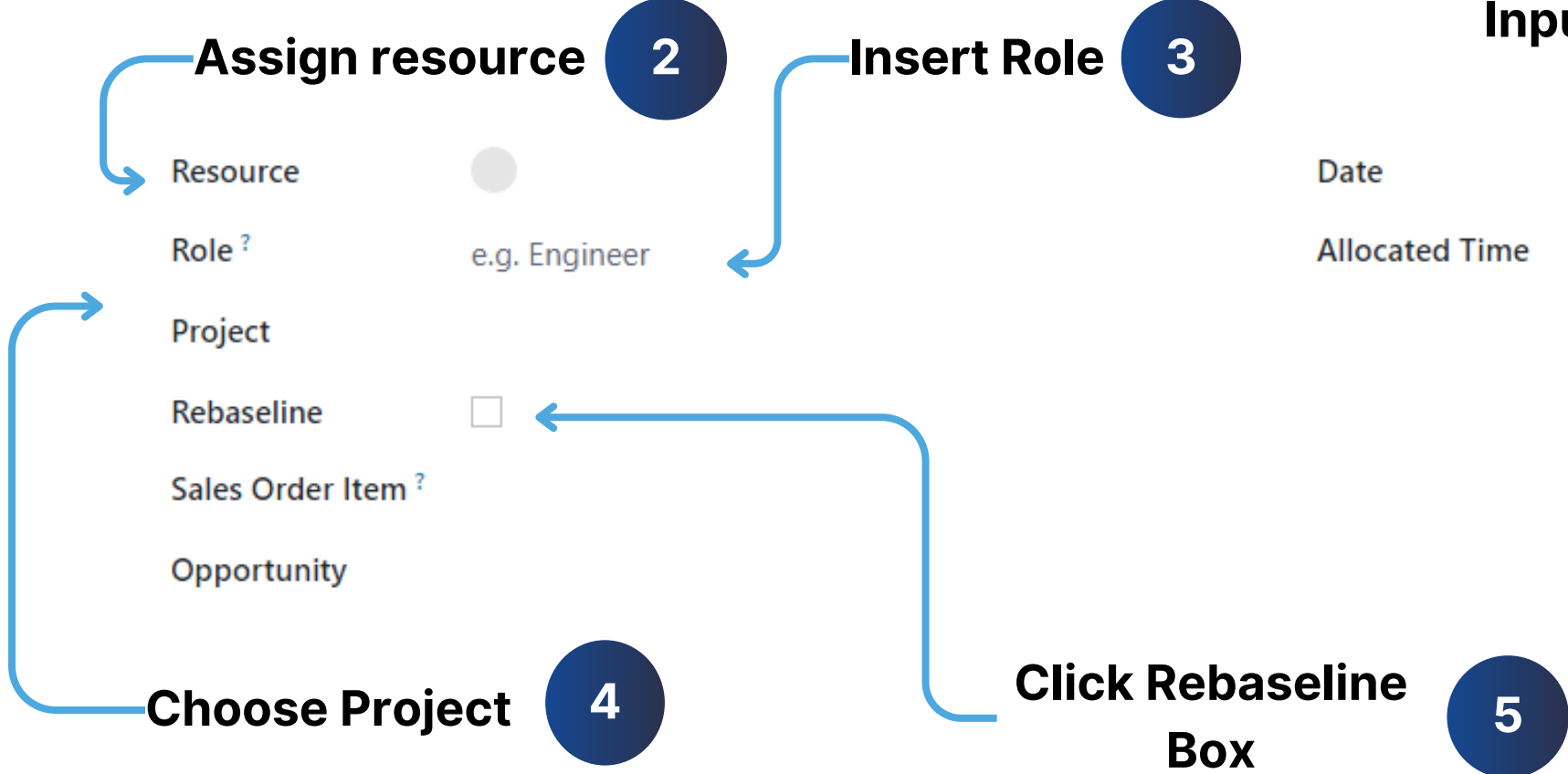


Change Data While Project is Running

When there is a change in Project Timeline



Klik New 1



Change Data While Project is Running

When there is a change in Project Timeline : **If there is many resources**

mata

Search Resource for: mata

Search Role for: mata

Search Project for: mata

Search Sales Order for: mata

Search Service for: mata

Search Department for: mata

Search Manager for: mata

Search Job Title for: mata

Search Skills for: mata

Search Note for: mata

Pilih bentuk List

2

Resource

A Andana Budhi Andika

Edi Sulistiono

Centang checkbox Resource

3

Print

Action

Filters

Export

Mass duplicate

Delete

Publish & Send

Publish

Reset to Draft

Generate Timesheets

4

Klik Mass Duplicate

Filters

Add Custom Filter

Allocated Time %

less than

1.00

APPLY

+ADD A CONDITION

Klik Filters dan Add Custom Filter dengan ketentuan disamping

5

Display Name

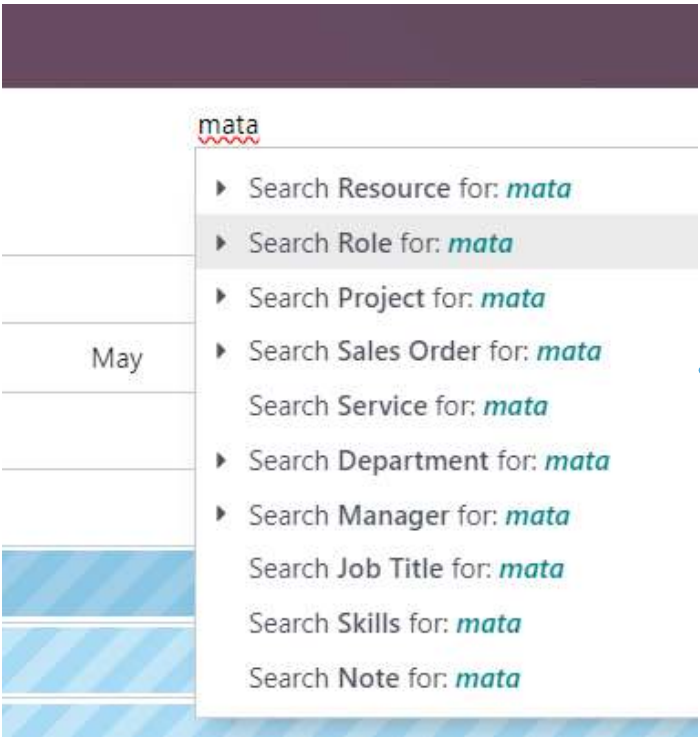
Status

Rebaseline

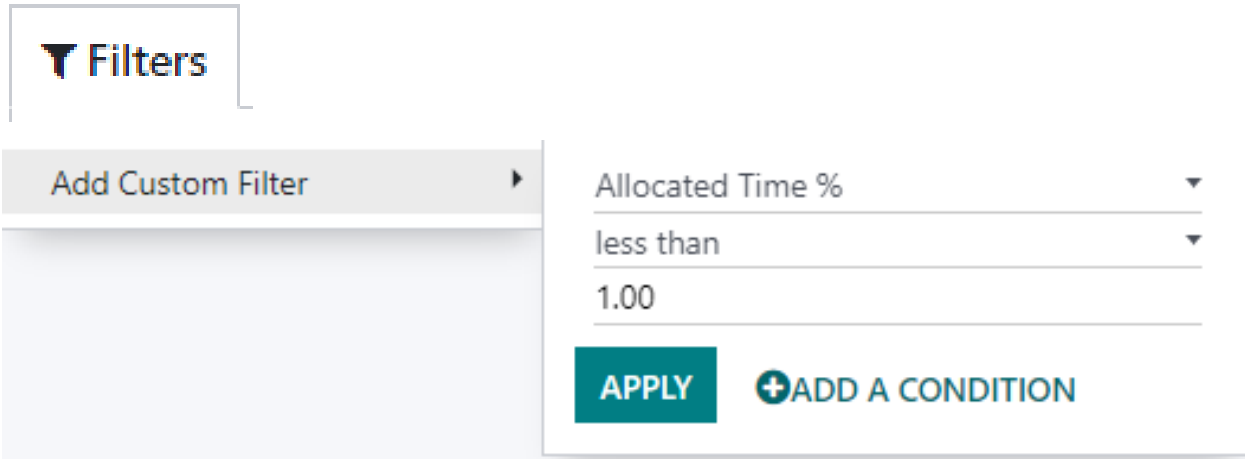
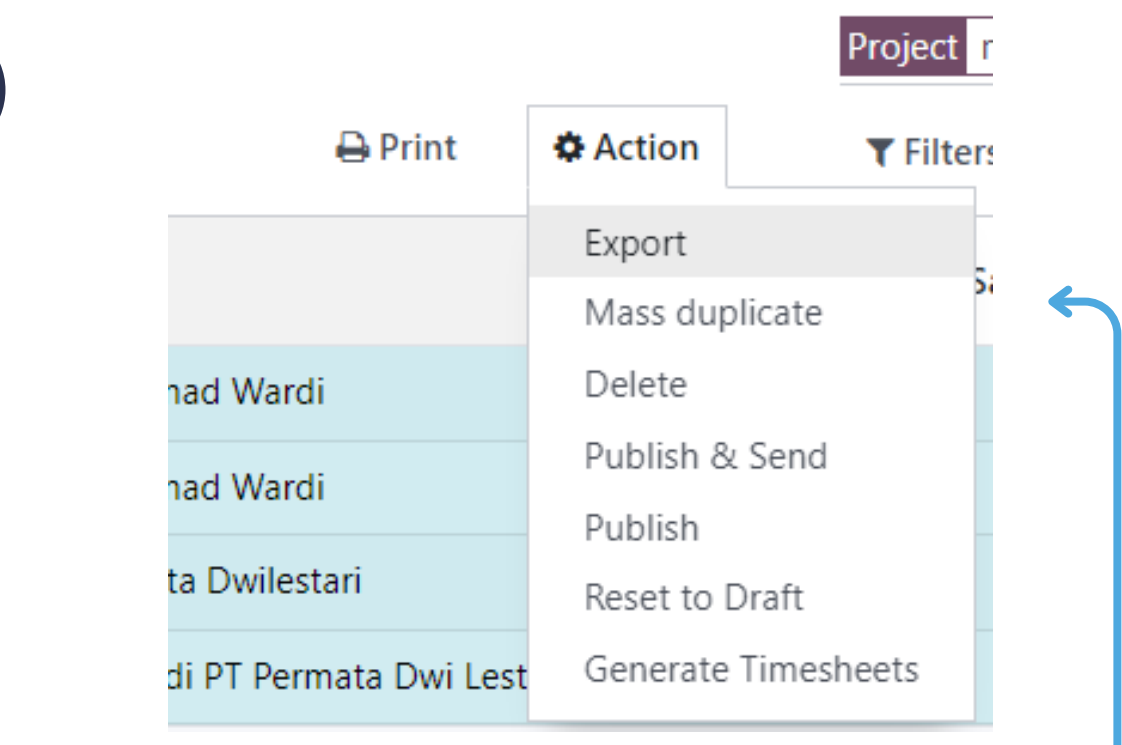
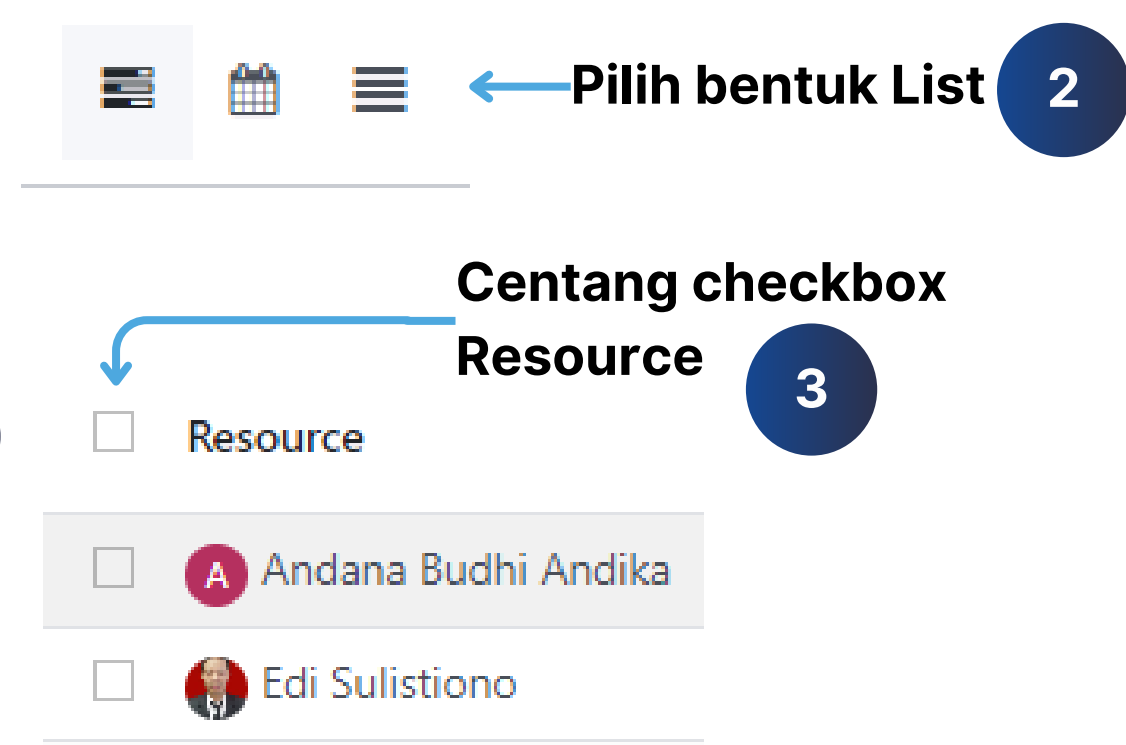
Add Custom Field

Klik Icon ini di bagian kanan halaman dan centang checkbox Rebaseline

6



Cari nama project dan pilih Search Project



Klik Filters dan Add Custom Filter dengan ketentuan disamping



Klik Icon ini di bagian kanan halaman dan centang checkbox Rebaseline

Change Data While Project is Running

When there is a change in Project Timeline : **If there is many resources**

Centang checkbox Resource 7

☒ Resource

Resource	Allocated Time	Rebaseline
☒  Andana Budhi Andika	00:00	☐
☒  Edi Sulistiono	00:00	☐

Start Date	End Date	Allocated Time	Rebaseline
11/12/2023 08:00:00	29/02/2024 17:00:00	00:00	☒
11/12/2023 08:00:00	29/02/2024 17:00:00	00:00	☒

Centang checkbox Rebaseline 8

Confirmation

Are you sure you want to perform the following update on those 2 records ?

Field: Rebaseline
Update to: ☒

Klik OK 9

Schedule		January	February	March
Open Shifts				
 Andana Budhi Andika (Functional Engineer)		Topup 48 Mandays Kisel		Topup 48 Manday...
 Edi Sulistiono (Odoo Functional Lead)		Topup 48 Mandays Kisel		Topup 48 Manday...
Total		123:12	106:24	

Ubah Start Date dan End Date 10

Hasil Rebaseline dalam bentuk Gantt 11

Information Status

 **Edi Sulistiono** (Odoo Functional Le

Topup 48 Mandays Kisel

Strip-strip menunjukkan
progres pengisian timesheet

Surianata (Odoo Devel

[x] Odoo - RS Mata Achmad

Surianata (Odoo Devel

S00943 - Service Odoo Ir

Trheamadiazuls...

Status Opportunity Planning
(Oranye) berubah menjadi
Project Planning (Biru). Status
warna merah manandakan
adanya Rebaseline di Project
Planning Tersebut

DAY WEEK MONTH YEAR

 **Quartet**

1,384 h / 1,992 h (69.48%)

 **Shesia**

2,104 h / 1,992 h (105.62%)

8 jam x 249 hari (1 tahun) = 1992 jam

**Work Hours Resource
dalam setahun**

Informasi workload planning resource pada
suatu periode

- hijau pertanda resource tidak
mengalami over planning allocated time
- merah pertanda resource mengalami
over planning allocated time

Jumlah Allocated Time Planning
Resource dalam setahun

S00933 - Instalasi dan Konfigurasi AIP
JOG dan DJJ - Instalasi dan Konfigurasi
AIP JOG dan DJJ

S00996 - Tape Lib

Allocated Time — 292:00 (100.00%)
Sales Order Item — S00933 - Instalasi dan
Konfigurasi AIP JOG dan DJJ
6/3/2024 8:00 AM → 7/26/2024 5:00 PM

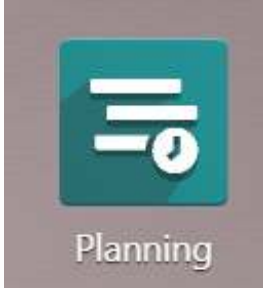
1 other shift(s) in conflict.



S00933 - Instalasi dan Konfigurasi ...

Flag merah menandakan resource
mengalami conflict planning, terjadi karena
resource dialokasikan ke dalam berbagai
project yang berbeda dalam satu waktu

Laporan Planning



Klik Modul Planning 1

Planning Schedule My Planning Reporting Configuration

Klik Reporting 2

Schedule by Resource

NEW ← TODAY → DAY WEEK MONTH YEAR PUBLISH PLAN ORDER

Schedule	January	February	March
Open Shifts			
Abdi Bimantara (Security Operation Cen			

Reporting Configuration

Planning Analysis

Klik Planning Analysis 3

Ukuran analisis dapat disesuaikan dengan kebutuhan

MEASURES INSERT IN SPR

- ✓ Allocated Hours
- Allocated Hours Cost
- Allocated Time (%)
- Billable Hours Allocated
- Effective Hours
- Effective Hours Cost
- Non-billable Hours Allocated
- Progress (%)
- Remaining Hours
- ✓ Working Days

Planning Analysis

MEASURES INSERT IN SPREADSHEET

	Total	Allocated Hours	Working Days	Effective Hours
Total	43308:08	11,844.75	426:54	
Abdi Bimantara	00:00	10.00	00:00	
Abdul Haris	08:00	1.00	00:00	
Andana Budhi Andika	17754:32	7,487.50	138:49	
Arif Mustaqim	1412:00	670.00	164:05	
Bella Alysha Vira	648:00	78.00	00:00	
Berlin Anendya Fatmawati	120:00	23.00	24:00	
Diki Setiawan	736:00	92.00	00:00	
Edi Sulistiono	1220:48	644.00	84:00	
Fadhilah Alya Surya Putri	2408:00	301.00	00:00	
Faza	64:00	7.00	00:00	
Hasan	112:00	14.00	00:00	
I Gusti Ayu Deriana W	651:12	97.00	00:00	
Ilham Azis	2272:00	284.00	00:00	

Planning allocated time

Total actual work hours dari timesheet

4

Laporan Planning :

Untuk melihat Project yang sudah dibuatkan Planning dan belum : **Sudah Dibuat**

1 Klik Reporting

PlanningScheduleMy PlanningReportingConfig

Schedule by Resource

NEW←TODAY→DAYWEEKMONTHYEAR

Schedule

January

Open Shifts

Abdi Bimantara (Security Operation Cen

ReportingConfiguration

Planning Analysis

Project Planning Analysis

Opty Planning Analysis

Klik Project Planning Analysis

Search...

Filters

Group By

Have Planning

No Planning

Add Custom Filter

BANK BJB-REPEAT

BJB - Storage Area

IDX Record Terdan

Klik Have Planning

PlanningScheduleMy PlanningReportingConfiguration		Berlin Anendya Fatmawati
Project Planning Analysis	Have Planning	Search...
	Filters	Group By
		1-7 / 7
Department	Name	Resource Total
JUKE / JST / Solution Delivery / Software / ERP & Business App	Aplikasi RBB	2
JUKE / JST / Solution Delivery / Software / Enterprise Applications / Application Development	IDX Record Terdampak Pengembangan IDX Portal	3
JUKE / JST / Solution Delivery / Software	L1 Support 2023 (Veeam,Vmware, Lenovo, Dell)	5
JUKE / JST / Solution Delivery / Software / Analytics	Pembuatan DWH eBAE Next G	3
	Renewal Palo Alto - DSSP (2023)	1

Resource Total
2
3
5

Adanya angka diatas 0 menandakan bahwa sudah dibuatnya Project Planning

Laporan Planning :

Untuk melihat Project yang sudah dibuatkan Planning dan belum : **Belum Dibuat**

1 Klik Reporting

PlanningScheduleMy PlanningReportingConfig

Schedule by Resource

NEW←TODAY→DAYWEEKMONTHYEAR

Schedule

January

Open Shifts

Abdi Bimantara (Security Operation Cen

ReportingConfiguration

Planning Analysis

Project Planning Analysis

Opty Planning Analysis

Klik Project Planning Analysis

2

Search...

FiltersGroup By

Have Planning

No Planning

Add Custom Filter

BANK BJB-REPEAT

BJB - Storage Area

IDX Record Terdar

Klik No Planning

3

PlanningScheduleMy PlanningReportingConfiguration			No Planning		Search...	
Project Planning Analysis			Filters	Group By	Favorites	1-32 / 32
Department	Name	Resource Total				
☐ JUKE / JST / Solution Delivery / Software	BANK BJB-REPEAT ORDER DRC	0				
☐ JUKE / JST / Solution Delivery / Software	BJB - Storage Area Production DC Bank BJB	0				
☐ JUKE / PSS / Cyber Security Strategy & Service	L1 Support 2023 (Fortinet, Switch Dell, PaloAlto)	0				

Resource Total
0
0
0

Angka 0 menandakan bahwa belum dibuatnya Project Planning

4

Laporan Planning :

Untuk melihat Opty yang sudah dibuatkan Planning dan belum : Sudah Dibuat

1 Klik Reporting

PlanningScheduleMy PlanningReportingConfig

Schedule by Resource

NEW←TODAY→DAYWEEKMONTHYEAR

Schedule

January

Open Shifts

Abdi Bimantara (Security Operation Cen

ReportingConfiguration

Planning Analysis

Project Planning Analysis

Opty Planning Analysis

Klik Opty Planning Analysis 2

Opty Planning Analysis

Have Planning x Search...

FiltersGroup ByFavorites

1-5 / 5 <>

Department	Name	Resource Total
☐ JUKE / PSS / Cyber Security Strate...	PAM Delinea	3
☐ JUKE / JST / Solution Delivery / So...	Enhancement TIBCO ASDP (Dev TIBCO Platform Management)	1
☐ JUKE / JST / Solution Delivery / So...	Odoo UB Industri	3

Resource Total
3
1
3

Adanya angka diatas 0 menandakan bahwa sudah dibuatnya Opty Planning

4

Search...

FiltersGroup By

Have Planning

No Planning

Add Custom Filter ▶

BANK BJB-REPEAT

BJB - Storage Area

IDX Record Terdar

Klik Have Planning 3

Laporan Planning :

Untuk melihat Opty yang sudah dibuatkan Planning dan belum : **Belum Dibuat**

1

Klik Reporting

PlanningScheduleMy PlanningReportingConfig

Schedule by Resource

NEW←TODAY→DAYWEEKMONTHYEAR

Schedule

January

Open Shifts

Abdi Bimantara (Security Operation Cen

ReportingConfiguration

Planning Analysis

Project Planning Analysis

Opty Planning Analysis

Klik Opty Planning Analysis 2

Opty Planning Analysis			No Planning	Search...	Filters	Group By	Favorites	1-18 / 18
Department	Name	Resource Total						
☐ JUKE / JST / Solution Delivery / So...	PostgreSQL	0						
☐ JUKE / PSS / Cyber Security Strate...	Threat Hunting & Soceng	0						
☐ JUKE / JST / Solution Delivery / So...	Loyalty Program	0						

Resource Total
0
0
0

Angka 0 menandakan bahwa belum dibuatnya Opty Planning

4

Search...

FiltersGroup By

Have Planning

No Planning

Add Custom Filter

BANK BJB-REPEAT

BJB - Storage Area

IDX Record Terdan

Klik No Planning 3

THANK YOU

Qalbu - Change Management Team

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