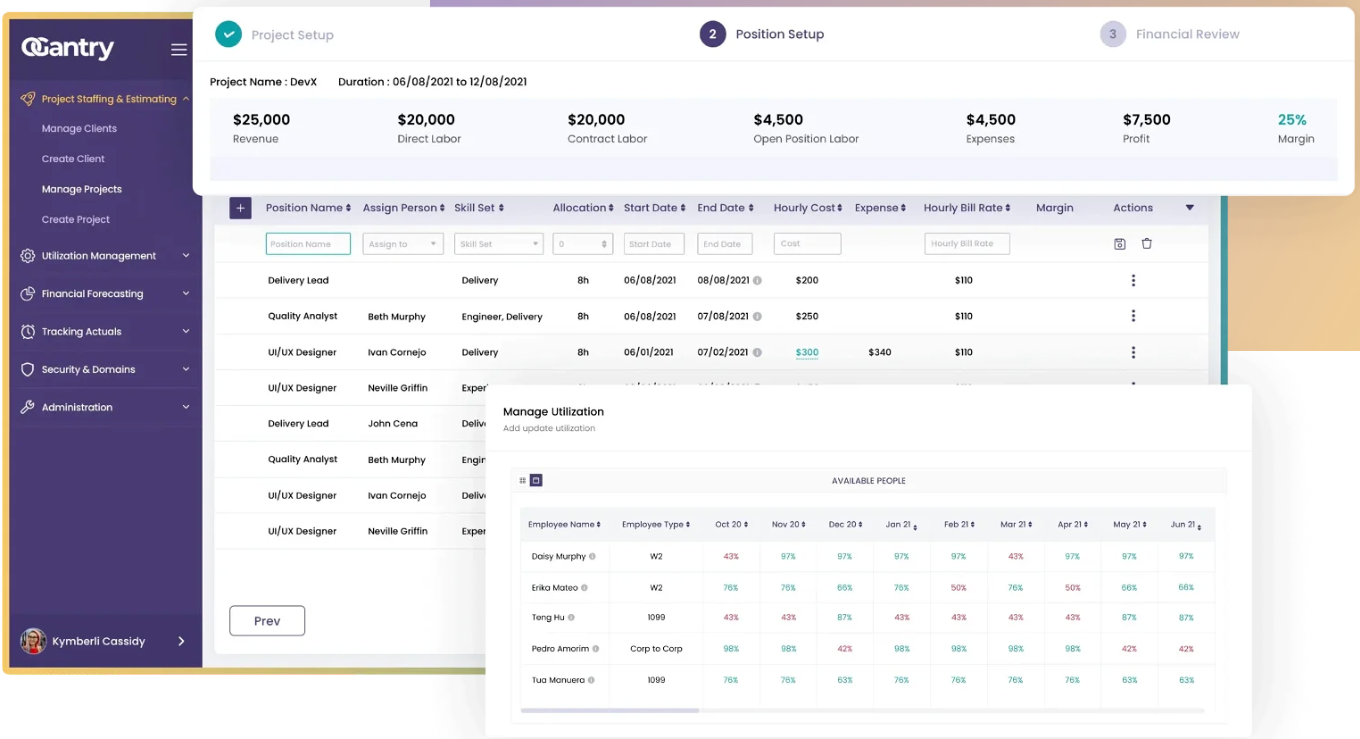
OGantry

Data Management To Automate Business Processes And Easily Manage Clients And Employees


OGantry
Project Staffing & Estimating
Manage Clients
Create Client
Manage Projects
Create Project
Utilization Management
Financial Forecasting
Tracking Actuals
Security & Domains
Administration
Kymberli Cassidy
Project Setup
2 Position Setup
3 Financial Review
Prev

Project Name : DevX   Duration : 06/08/2021 to 12/08/2021

$25,000	$20,000	$20,000	$4,500	$4,500	$7,500	25%
Revenue	Direct Labor	Contract Labor	Open Position Labor	Expenses	Profit	Margin

Position Name	Assign Person	Skill Set	Allocation	Start Date	End Date	Hourly Cost	Expense	Hourly Bill Rate	Margin	Actions
Position Name	Assign to	Skill Set	0	Start Date	End Date	Cost		Hourly Bill Rate		
Delivery Lead		Delivery	8h	06/08/2021	08/08/2021	$200		$110		
Quality Analyst	Beth Murphy	Engineer, Delivery	8h	06/08/2021	07/08/2021	$250		$110		
UI/UX Designer	Ivan Cornejo	Delivery	8h	06/01/2021	07/02/2021	$300	$340	$110		
UI/UX Designer	Neville Griffin	Exper								
Delivery Lead	John Cena	Deliv								
Quality Analyst	Beth Murphy	Engin								
UI/UX Designer	Ivan Cornejo	Deliv								
UI/UX Designer	Neville Griffin	Exper								

Manage Utilization

Add update utilization

AVAILABLE PEOPLE

Employee Name	Employee Type	Oct 20	Nov 20	Dec 20	Jan 21	Feb 21	Mar 21	Apr 21	May 21	Jun 21
Daisy Murphy	W2	43%	97%	97%	97%	97%	43%	97%	97%	97%
Erika Mateo	W2	76%	76%	66%	76%	50%	76%	50%	66%	66%
Teng Hu	1099	43%	43%	87%	43%	43%	43%	43%	87%	87%
Pedro Amorim	Corp to Corp	98%	98%	42%	98%	98%	98%	98%	42%	42%
Tua Manuera	1099	76%	76%	63%	76%	76%	76%	76%	63%	63%

Automating Data Management To Save Time And Focus On Growing Business

OGantry focused on creating a streamlined process to minimize data management and utilize the saved time and resources to work on optimizing business throughput. With heaps of resources at hand, OGantry ties all of your data together into an interface designed around what leaders care about i.e. managing business processes effectively.

Deliveries

– WebApp

Technologies and Integration

– Angular

– Java

Data Management

Business users needed data management streamlining for organizational processes, to reduce hefty time on manual work and drive the workforce to focus on strategic tasks. This was highly demanded to enhance accuracy, consistency, and data updates, minimizing errors and the need for manual reconciliation. This efficiency

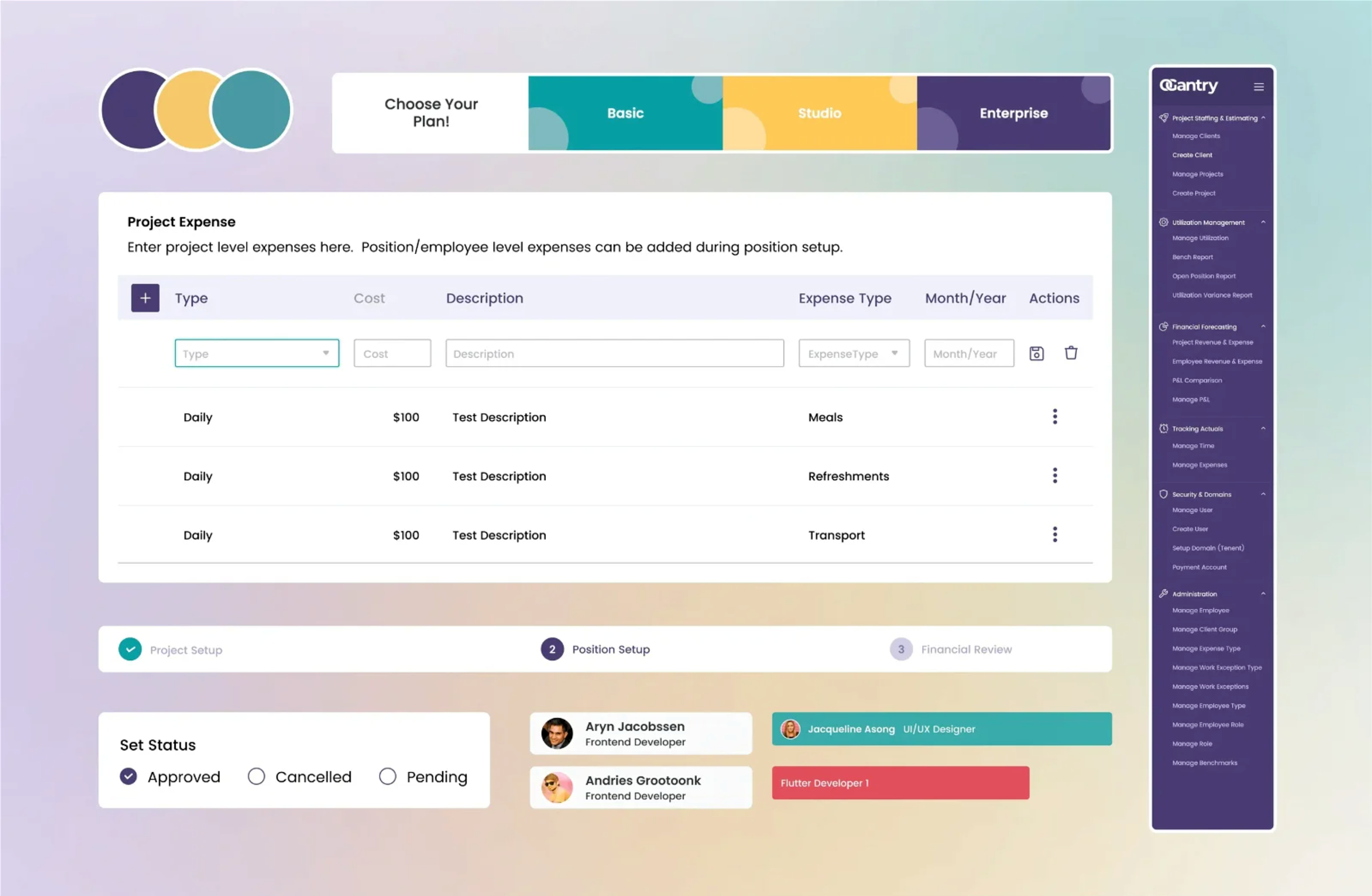
Resource Utilization

The project aimed for efficient resource utilization which is fundamental for saving time and optimizing projects. Strategic allocation of personnel, finances, and technology should streamline workflows, enhance productivity, and minimize errors. By assigning skilled individuals to tasks aligned with their expertise and preventing improvement was aimed at facilitating quicker, well-informed decision-making, leading to significant time savings in various operational aspects.

bottlenecks, optimized resource management maximizes efficiency, contributing to overall project success.

Strategizing For Profit Optimization

OGantry wanted to come up with an application that could align with strategizing for profit optimization involving targeted approaches to pricing, cost management, and market positioning, leading to increased revenue. This included balancing strategic pricing models, attracting more customers, and encouraging repeat business through effective cost management and operational practices. Overall, a well-crafted profit optimization strategy was instrumental in enhancing profitability and setting the stage for sustained revenue growth.


Choose Your Plan!
Basic
Studio
Enterprise
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Create Client
Manage Projects
Create Project
Utilization Management
Manage Utilization
Bench Report
Open Position Report
Utilization Variance Report
Financial Forecasting
Project Revenue & Expense
Employee Revenue & Expense
P&L Comparison
Manage P&L
Tracking Actuals
Manage Time
Manage Expenses
Security & Domains
Manage User
Create User
Setup Domain (Tenent)
Payment Account
Administration
Manage Employee
Manage Client Group
Manage Expense Type
Manage Work Exception Type
Manage Work Exceptions
Manage Employee Type
Manage Employee Role
Manage Role
Manage Benchmarks
Project Setup
2 Position Setup
3 Financial Review
Aryn Jacobssen
Frontend Developer
Andries Grootoonk
Frontend Developer
Jacqueline Asong UI/UX Designer
Flutter Developer 1

Project Expense

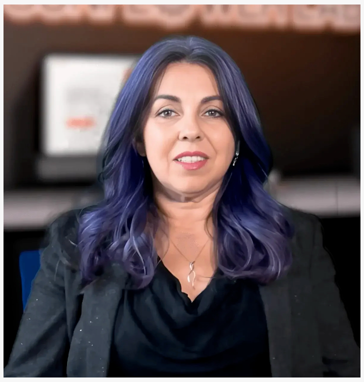
Enter project level expenses here. Position/employee level expenses can be added during position setup.

Type	Cost	Description	Expense Type	Month/Year	Actions
Type	Cost	Description	ExpenseType	Month/Year	
Daily	$100	Test Description	Meals		⋮
Daily	$100	Test Description	Refreshments		⋮
Daily	$100	Test Description	Transport		⋮

Set Status

● Approved ○ Cancelled ○ Pending

In Client’s Words!



“The utilization report was a successfully implemented module that allowed us to keep track of the resources and allocate them to projects accordingly. We were very impressed with the way Sunflower Lab handled the project and always delivered our requirements within timeline. There were instances where they faced challenges in executing the project but the way they handled these challenges was praiseworthy and we couldn’t have looked for a better partner.“

Kymberli Cassidy

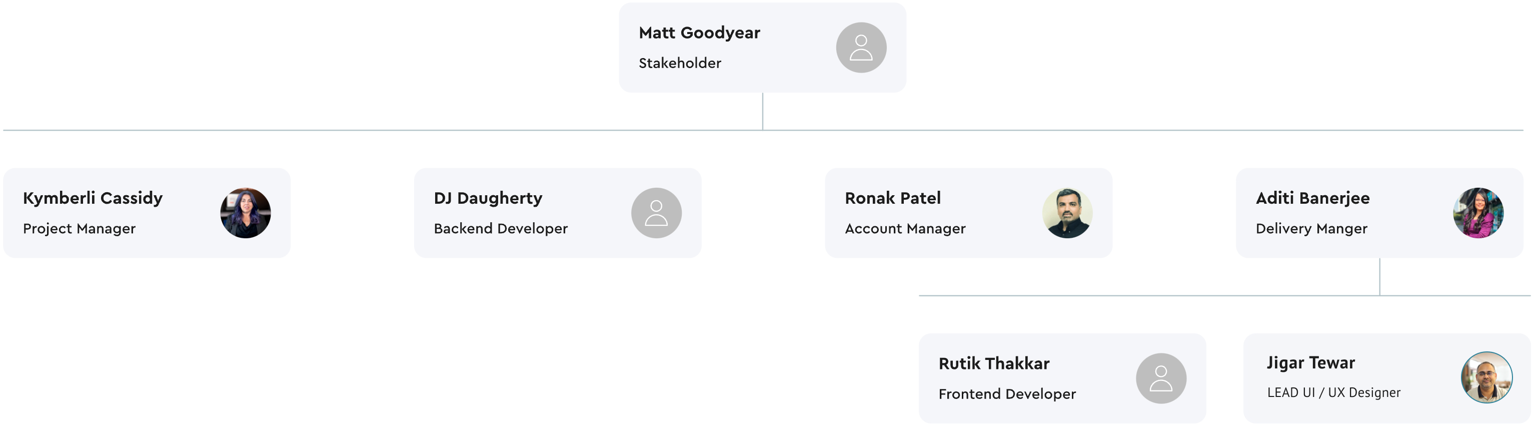
Project Manager

Timeline

Phase 1		Phase 2		Phase 3		Phase 4	
Jan-2022 to Mar-2022	Apr-2022 to Jun-2022	Jun-2022 to Sept-2022	Aug-2022 to Nov-2022	Aug-2022 to Nov-2022		Jul 2023 to Dec 2023	Jan 2024 to Dec 2024
• Report clean-up Bench, Utilization, Position & P&L Management • Adding Privacy policy with the App • CRUD Operation for Financial Adjustments for P&L	• Fix Bids Locks/ Plugs • Manage Filters	• P&L Comparison BETA • Filter updates/ clean up, Self Service user management	• P&L Comparison fixes	• Manage Tags • UX Enhancements for the Staff Position Reports • Integrating the Calendar for the Position Reports		• New Position Report • Reports Enhancements • Improve the P&Ls with Enhancements • Defects and Fixes Enhancements	• Timesheet: In App Time Entry & Management • Self Service Tenant Management • UX Enhancements for the Reports • Fixing Ragging and Sub-Tagging • Dashboard / Root Cause Finder

Team Size

Sunflower Lab handpicked professionals until we were convinced that the proven team would best fit for Ogantry by assessing our and Ogantry's strengths.


Matt Goodyear
Stakeholder
Kymberli Cassidy
Project Manager
DJ Daugherty
Backend Developer
Ronak Patel
Account Manager
Aditi Banerjee
Delivery Manger
Rutik Thakkar
Frontend Developer
Jigar Tewar
LEAD UI / UX Designer

Challenge #1

Managing Projects Staffing And Estimating

OGantry's clients also had their clients whose data they were managing. This implied a lot of focus on data management and not on business acceleration. Thus, OGantry reached out to Sunflower Lab to develop a solution where its clients could automate their data management and focus on building clients.

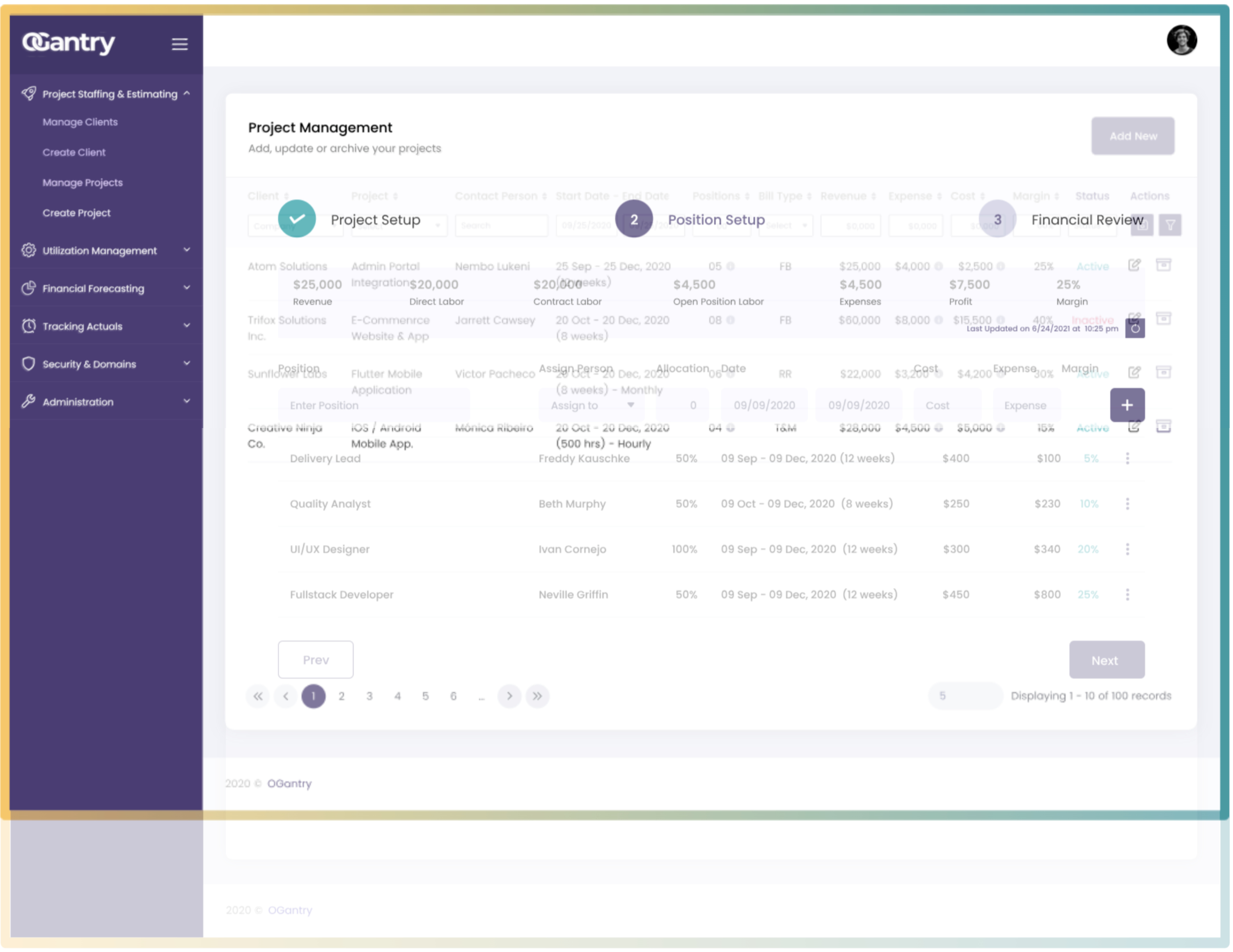
Whenever any client of OGantry needed to create a new project or manage an old one, it had to do it manually. And managing all this data manually needed a huge workforce and time. This made the process unmanageable and finding any insight was quite unachievable.

Our Resolution

We took this into consideration and implemented it in a working app model. The app allows users to create clients and add their information for tracking both active and inactive clients. This helps state which zone the clients are from and if there is anything that is notable about them mentioning it for users' assessment. In case there is particular info that needs to be highlighted about the clients we enable it.

Furthermore, apart from clients, projects can also be tracked. The project can be set up via a client for which it is implemented. It can be added for an existing or new client. The project is setup in three phases –

01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Create Client
Manage Projects
Create Project
Utilization Management
Financial Forecasting
Tracking Actuals
Security & Domains
Administration
Project Management
Add, update or archive your projects
Add New
Project Setup
2 Position Setup
3 Financial Review
$25,000 Revenue
$20,000 Direct Labor
$20,000 Contract Labor
$4,500 Open Position Labor
$4,500 Expenses
$7,500 Profit
25% Margin
Last Updated on 6/24/2021 at 10:25 pm
Position
Assign Person
Allocation
Date
Cost
Expense
Margin
Delivery Lead
Quality Analyst
UI/UX Designer
Fullstack Developer
Prev
Next
Displaying 1 - 10 of 100 records
2020 © OGantry

Project Setup

Here basic details about the project are measured like if it is a fixed-cost project, or time dependent project. This helps in calculating the overall profit/loss incurred via the project. Information about contact person, project expenses and other relevant details are added here.

Position Setup

In this section we allow clients to manage the position that would be needed for a particular project. Based on these details the total cost of employment will be calculated and tracked.

Financial Review

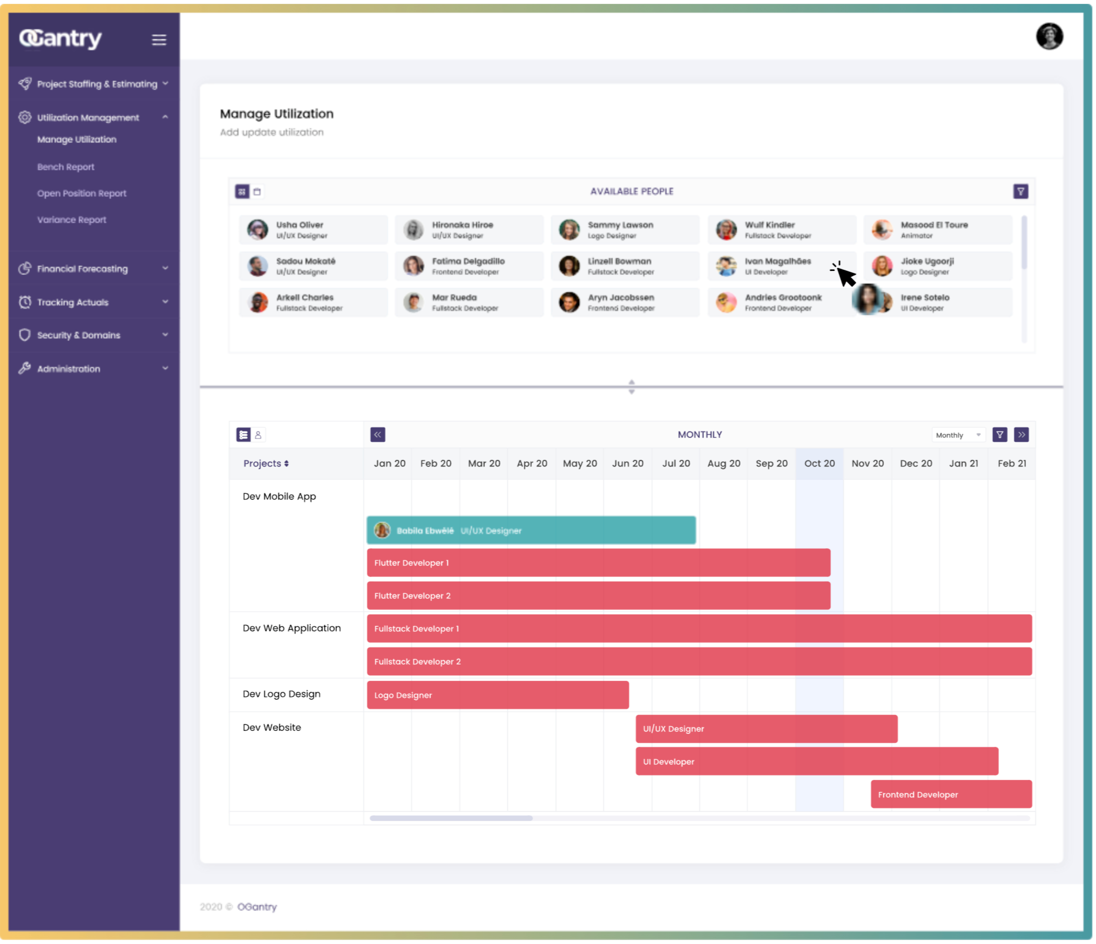
Based on the details entered in both of the above sections, a calculated estimate of the project cost and revenue will be reflected in this section.

The best part is the expenses and profit do not need to be calculated manually, as you mention the costs of operation the revenue is calculated automatically in the backend and reflected. Also, the utilization of a certain employee is calculated – whether they are on a bench or working on some project. Based on these inputs, the app also calculates the profit or loss based on projects in action.

Problem #2

Optimizing Resources

While a resource worked on a certain project, they follow certain modules – working on an hourly basis, project basis, or time slot basis. It became essential to quickly assess how long and efficiently a resource worked to calculate the profit they bring to the table.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Open Position Report
Variance Report
Financial Forecasting
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Security & Domains
Administration
Manage Utilization
Add update utilization
AVAILABLE PEOPLE
Usha Oliver UI/UX Designer
Hironaka Hiroe UI/UX Designer
Sammy Lawson Logo Designer
Wulf Kindler Fullstack Developer
Masood El Toure Animator
Sadou Mokaté UI/UX Designer
Fatima Delgadillo Frontend Developer
Linzell Bowman Fullstack Developer
Ivan Magalhães UI Developer
Jioke Ugoorji Logo Designer
Arkell Charles Fullstack Developer
Mar Rueda Fullstack Developer
Aryn Jacobssen Frontend Developer
Andries Grootoonk Frontend Developer
Irene Sotelo UI Developer
MONTHLY
Monthly
Projects
Jan 20
Feb 20
Mar 20
Apr 20
May 20
Jun 20
Jul 20
Aug 20
Sep 20
Oct 20
Nov 20
Dec 20
Jan 21
Feb 21
Dev Mobile App
Babila Ebwélé UI/UX Designer
Flutter Developer 1
Flutter Developer 2
Dev Web Application
Fullstack Developer 1
Fullstack Developer 2
Dev Logo Design
Logo Designer
Dev Website
UI/UX Designer
UI Developer
Frontend Developer
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02

Our Resolution

- Within the application one can view the utilization of resources/employees can be seen based on filters of projects like booked, completed, forecasted, etc. for a certain period time. Based on the filters past, present and future employee status can be seen along with details of a particular employee or a range of employees.

  This gives clients the liberty to manage their employees more effectively and allot tasks based on their bandwidth. Employees can be tracked based on their hourly utilization, percentage utilization or dollars (usage) basis.

- One other most prominent feature of resource utilization is to see the calendar-based consumption of resources with visual representation. It can be viewed which month where the resource is utilized.

  With this, we can track the lost revenue based on a particular employee's position in a project to make amendments to the strategy. At the same time, we enable you to calculate the report of positions that are not on the bench or the positions that are still open for a project.

Problem #3

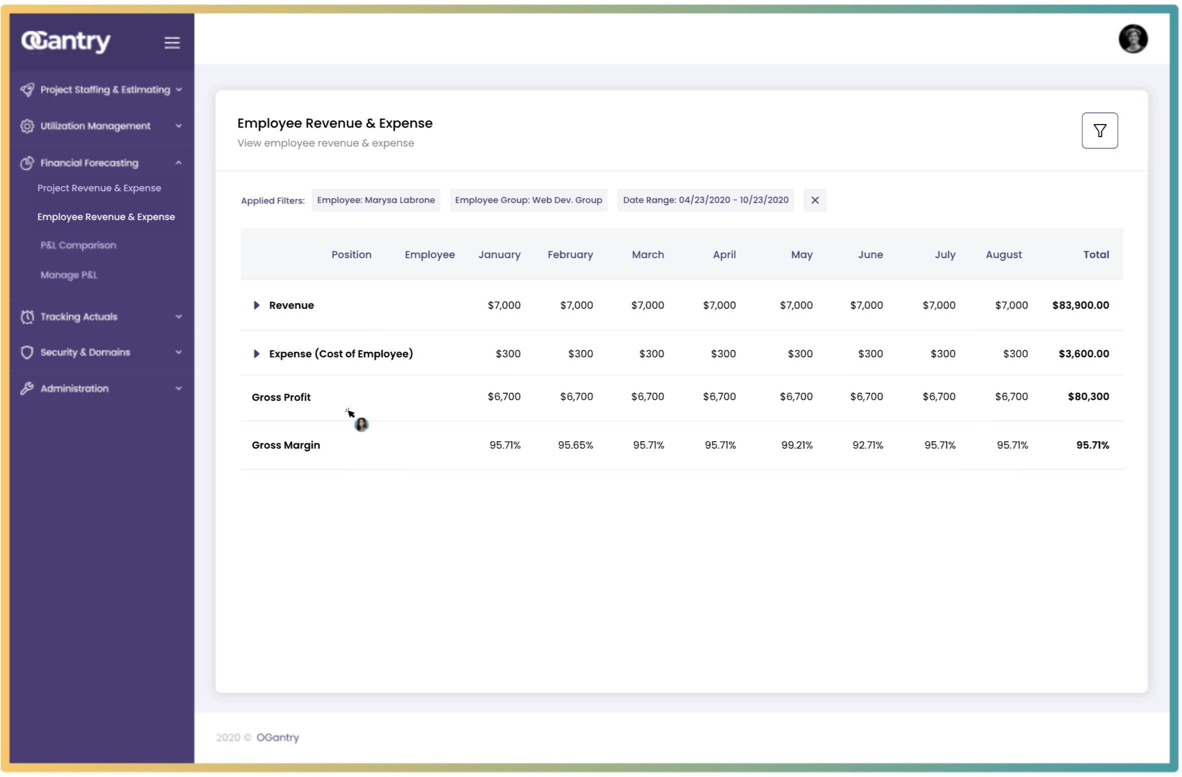
Forecasting Finances

While a resource worked on a certain project, they follow certain modules – working on an hourly basis, project basis, or time slot basis. It became essential to quickly assess how long and efficiently a resource worked to calculate the profit they bring to the table.

Our Resolution

Based on the financial year the app automatically calculates revenue, costs of goods sold, gross profit, gross margin, net profit and net margin.

03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Employee Revenue & Expense
View employee revenue & expense

Applied Filters: Employee: Marysa Labrone | Employee Group: Web Dev. Group | Date Range: 04/23/2020 - 10/23/2020

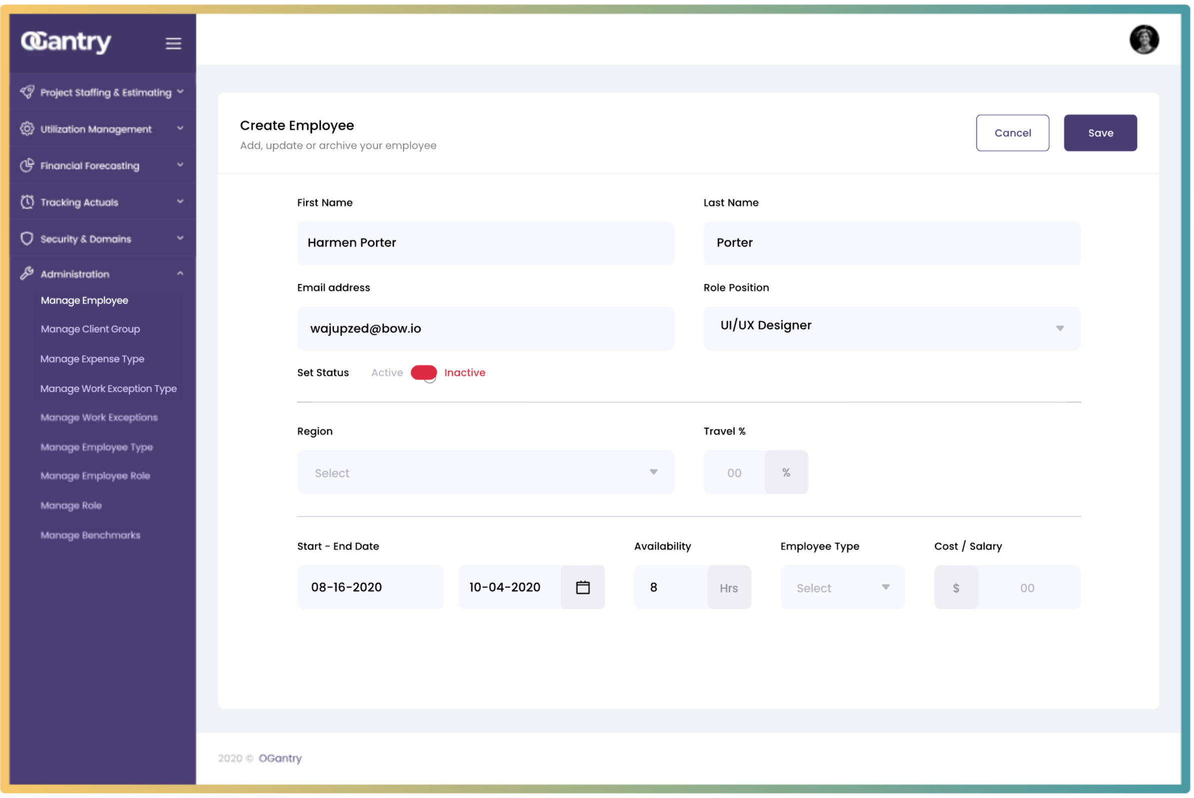
	Position	Employee	January	February	March	April	May	June	July	August	Total
▸ **Revenue**			$7,000	$7,000	$7,000	$7,000	$7,000	$7,000	$7,000	$7,000	**$83,900.00**
▸ **Expense (Cost of Employee)**			$300	$300	$300	$300	$300	$300	$300	$300	**$3,600.00**
Gross Profit			$6,700	$6,700	$6,700	$6,700	$6,700	$6,700	$6,700	$6,700	**$80,300**
Gross Margin			95.71%	95.65%	95.71%	95.71%	99.21%	92.71%	95.71%	95.71%	**95.71%**

Problem #4

Administrating

While a resource worked on a certain project, they follow certain modules – working on an hourly basis, project basis, or time slot basis. It became essential to quickly assess how long and efficiently a resource worked to calculate the profit they bring to the table.

04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Manage Client Group
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Manage Work Exception Type
Manage Work Exceptions
Manage Employee Type
Manage Employee Role
Manage Role
Manage Benchmarks
Cancel
Save
2020 © OGantry

Create Employee
Add, update or archive your employee

First Name: Harmen Porter
Last Name: Porter
Email address: wajupzed@bow.io
Role Position: UI/UX Designer
Set Status: Active ● Inactive
Region: Select
Travel %: 00 %
Start - End Date: 08-16-2020 10-04-2020
Availability: 8 Hrs
Employee Type: Select
Cost / Salary: $ 00

Our Resolution

- In case there are holidays or client visits or other such exceptions
- The app also gives at the same time liberty to manage employees

where the employee is not working it can be tracked as well.

- We allowed creating tags and adding subcategories for them. For instance, we have a tag BE implying backend, and we create a subcategory for it i.e. Java and apply these categories wherever necessary. We can also create a project category tag and add them to the projects.

– like adding employees and their details such as – email address, skill set, region, travel (if needed), utilization target, and more. At the same time, we can also add the expenses of employees both on a daily and monthly basis. Employees' schedules can also be updated in the app to gauge how many days they will be working or on leave. Their skill set is also something that can be updated.

Problem #5

Access Control

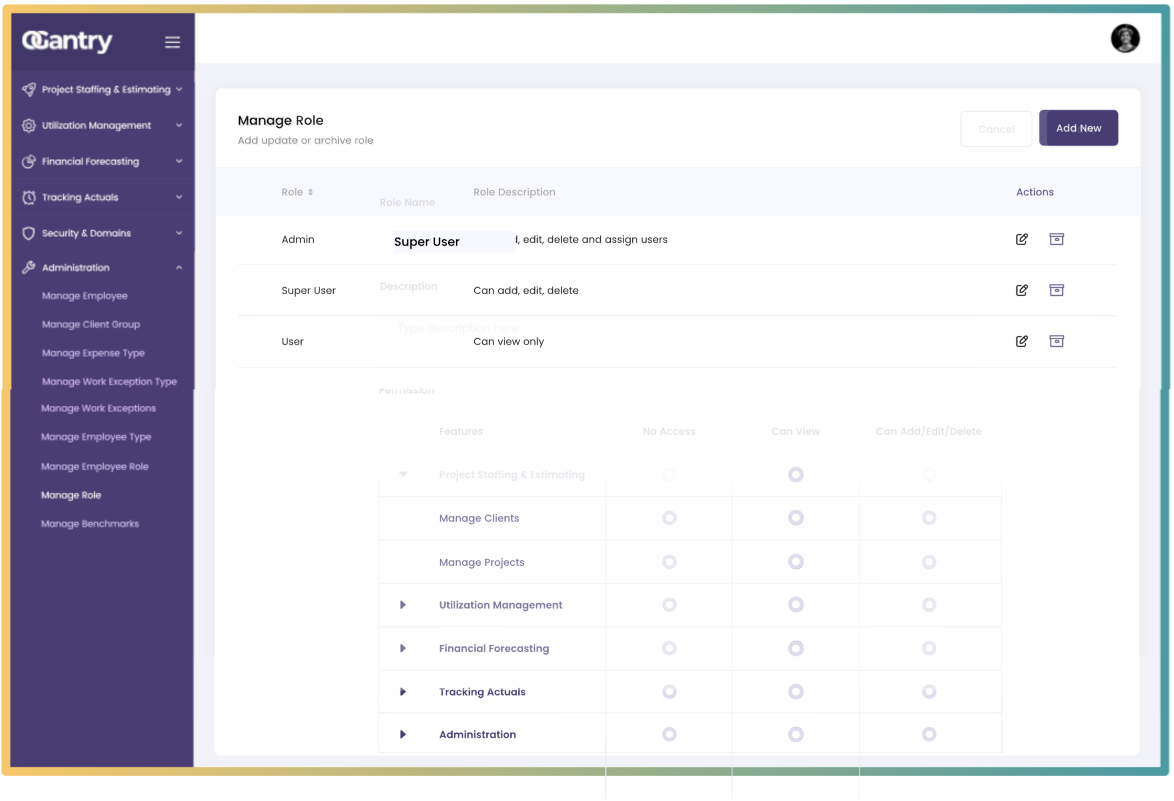
Since OGantry's stakeholders wanted a fully functional application that could cater to their clients, a well-regulated system was incepted by them with an access control system allow users to work collaboratively.

Our Resolution

In this section we allow the admin to create a user and assign them roles based on their access level. For instance, we allow them to access Project Staffing & Estimating, but refrain from using the Administration section.

Since there are multiple modules in the application, roles can be assigned according to their level of access. This is allowed by enabling checklists.

05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Manage Work Exception Type
Manage Work Exceptions
Manage Employee Type
Manage Employee Role
Manage Role
Manage Benchmarks
Cancel
Add New
Role Name
Super User
Description
Type description here
Permission

Manage Role

Add update or archive role

Role	Role Description	Actions
Admin	ı, edit, delete and assign users	
Super User	Can add, edit, delete	
User	Can view only	

Features	No Access	Can View	Can Add/Edit/Delete
Project Staffing & Estimating	○	○	○
Manage Clients	○	○	○
Manage Projects	○	○	○
Utilization Management	○	○	○
Financial Forecasting	○	○	○
Tracking Actuals	○	○	○
Administration	○	○	○

OGantry

Before Digital Revolution

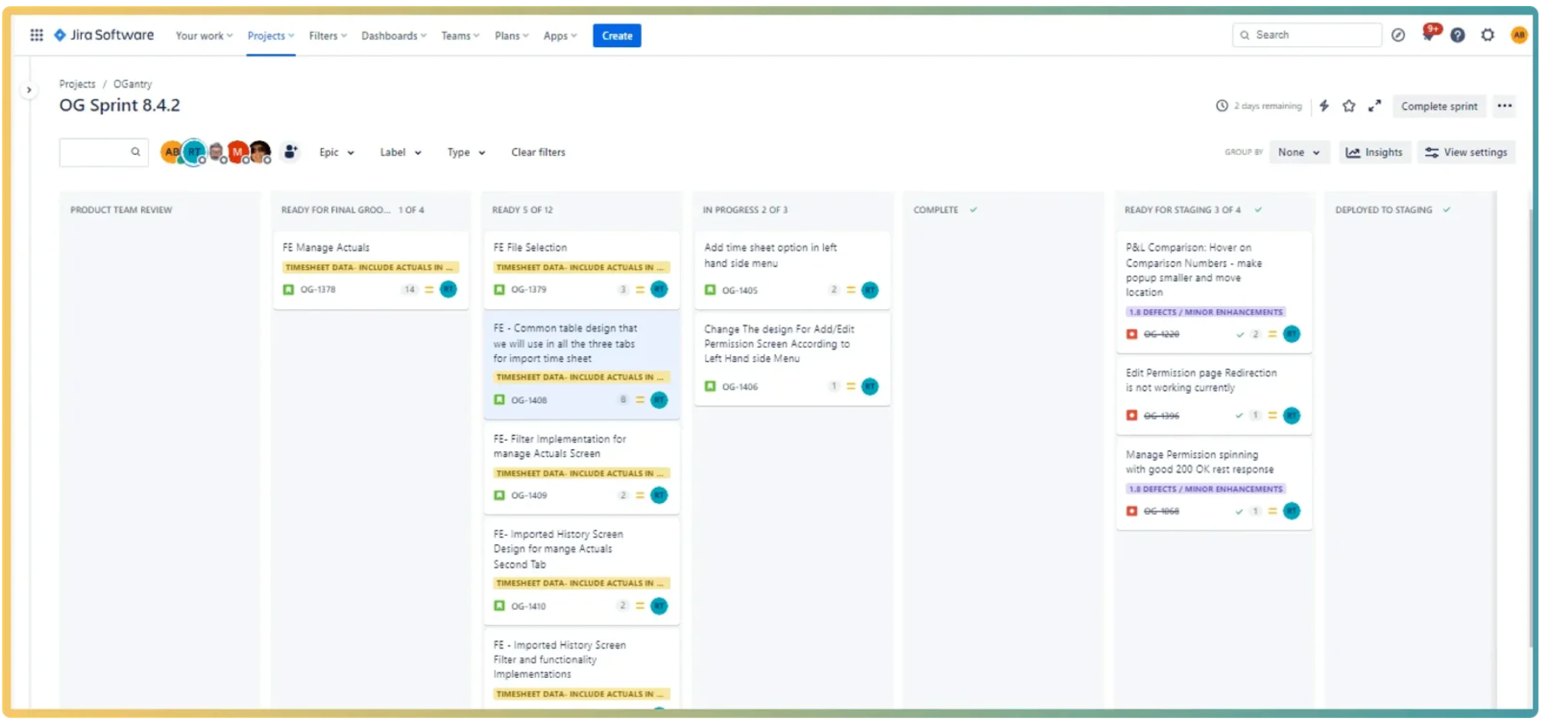
The parallel implementation of project and data management was cumbersome which meant the stakeholders had to sift time in managing data which was an overhead in business applications.

Before

After

With the inception of OGantry business owners can manage data and projects parallelly without spending too much time and resources on solely taking care of data.

Project Management Tool


Jira Software
Your work
Projects
Filters
Dashboards
Teams
Plans
Apps
Create
Search
Epic
Label
Type
Clear filters
2 days remaining
Complete sprint
GROUP BY
None
Insights
View settings

Projects / OGantry

OG Sprint 8.4.2

PRODUCT TEAM REVIEW

READY FOR FINAL GROO... 1 OF 4

- FE Manage Actuals — TIMESHEET DATA- INCLUDE ACTUALS IN ... — OG-1378 — 14

READY 5 OF 12

- FE File Selection — TIMESHEET DATA- INCLUDE ACTUALS IN ... — OG-1379 — 3
- FE - Common table design that we will use in all the three tabs for import time sheet — TIMESHEET DATA- INCLUDE ACTUALS IN ... — OG-1408 — 8
- FE- Filter Implementation for manage Actuals Screen — TIMESHEET DATA- INCLUDE ACTUALS IN ... — OG-1409 — 2
- FE- Imported History Screen Design for mange Actuals Second Tab — TIMESHEET DATA- INCLUDE ACTUALS IN ... — OG-1410 — 2
- FE - Imported History Screen Filter and functionality Implementations — TIMESHEET DATA- INCLUDE ACTUALS IN ...

IN PROGRESS 2 OF 3

- Add time sheet option in left hand side menu — OG-1405 — 2
- Change The design For Add/Edit Permission Screen According to Left Hand side Menu — OG-1406 — 1

COMPLETE ✓

READY FOR STAGING 3 OF 4 ✓

- P&L Comparison: Hover on Comparison Numbers - make popup smaller and move location — 1.8 DEFECTS / MINOR ENHANCEMENTS — ~~OG-1220~~ — ✓ 2
- Edit Permission page Redirection is not working currently — ~~OG-1396~~ — ✓ 1
- Manage Permission spinning with good 200 OK rest response — 1.8 DEFECTS / MINOR ENHANCEMENTS — ~~OG-1068~~ — ✓ 1

DEPLOYED TO STAGING ✓

Static Project Report

In the utilization report of employees, we have project status. Project status was written statistically on UI side. It was managed on the frontend and saved as draft on backend which was leading to issues.

Our Resolution

We worked on this and after trying multiple solutions we discovered that the reliance for this feature should only be dependent on the backend and not the frontend. By managing everything from the backend the issues were streamlined.

Challenges

01

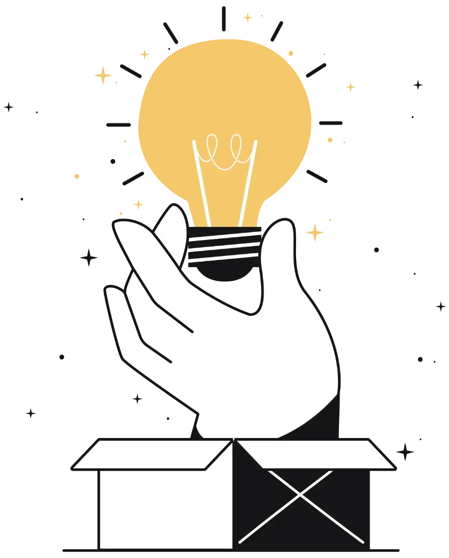
Implementing Calendar View

We implemented calendar view using it for the 3rd party library i.e. Mobiscroll. In this tooltip was not coming properly.

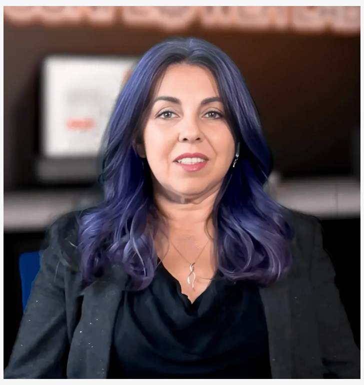
02

How We Overcame It?

This was completely new to us. We created a new UI to make users understand project allocations. We settled on how users are allocated for which term project they are allocated and which client they are working on. For instance, if the allocation is zero percent, we made it more viewable. With this, there was a clear insight into when a particular resource was available and what projects they were working on.



In Client’s Words!



> **“With Calendar View feature we were able to visualize the employees’ bandwidth and utilize it accordingly. Initially you guys struggled to deliver on the module but since the module was completely new to you we thought you won’t be able to fulfill it. However, to our surprise, the module was achieved where we were able to view the allocation of resources.“**

Kymberli Cassidy

Project Manager