Service Call Capacity Planning

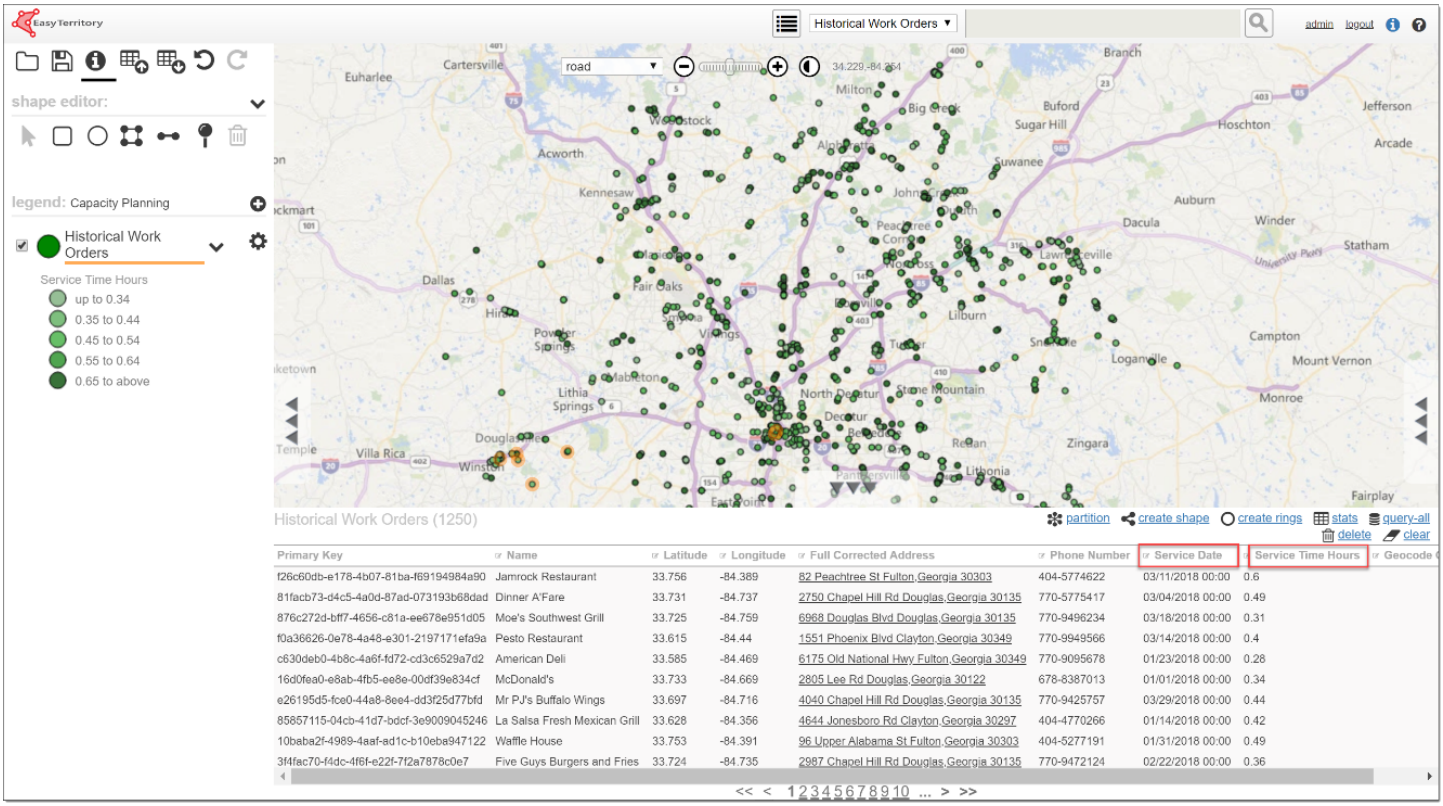
Capacity Planning and Scheduling · https://www.easyterritory.com/documentation/territory-designer/capacity-planning-and-scheduling/capacity-planning/

Capacity Planning (CP) estimates the necessary manpower (workload) for a given region based on historical records (e.g. completed work orders.) With the capacity planning tool, you determine if you have too many or too few reps or service-techs in a territory. The estimated workload is broken down by service date and the results are displayed in the statistics panel which provides additional information such as mean and standard-deviation and allows for exporting to Excel. Multiple factors are considered in this analysis:

- How is workload trending over time?
- How much dwell time is spent on-site?
- What is the driving distance between sites?
- How many hours per day are you targeting for your resources?

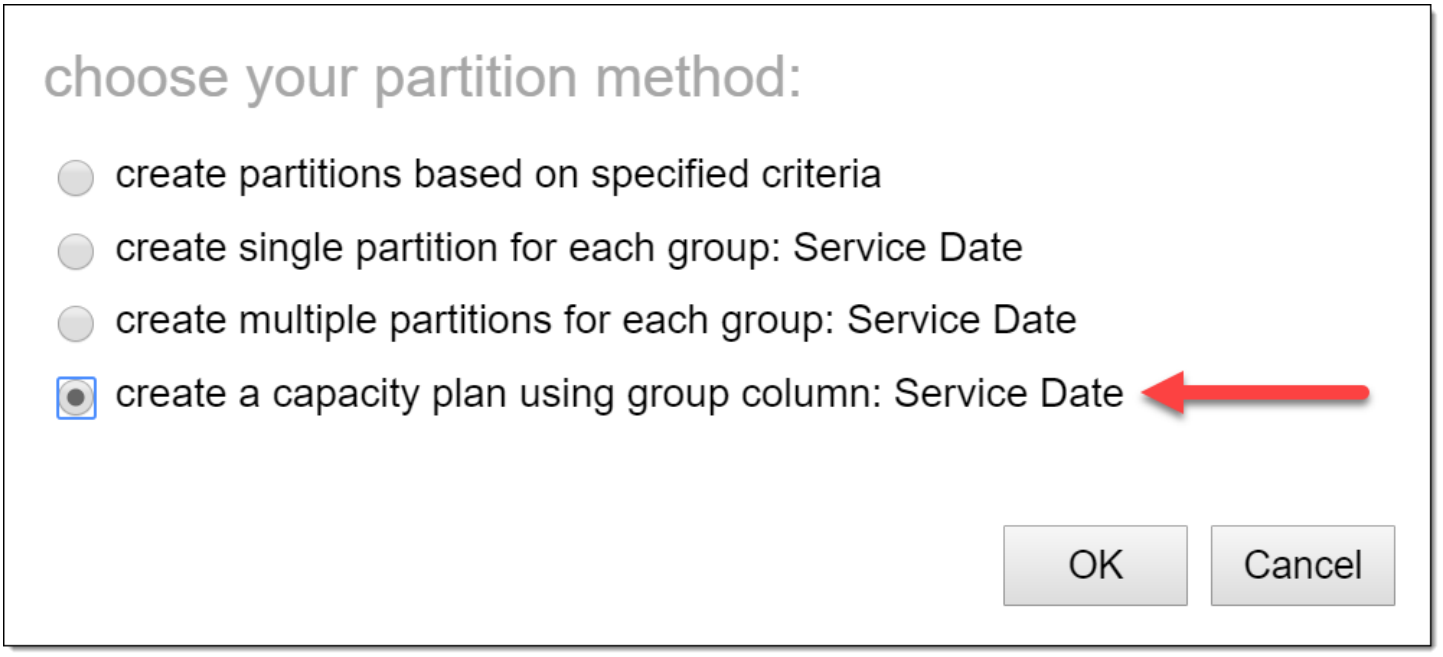
In order to use EasyTerritory's capacity planning feature, there are two required data-columns which must be included in your dataset and flagged with the appropriate metadata:

- *Visit Date* – this is the date a rep visited a customer or a service-tech performed a break/fix. The data column must be flagged with **partitionid**
- *On-site time in hours* – this specifies the amount of dwell time per visit for a given site in hours. The data column must be flagged with **routestopdelayhours**.

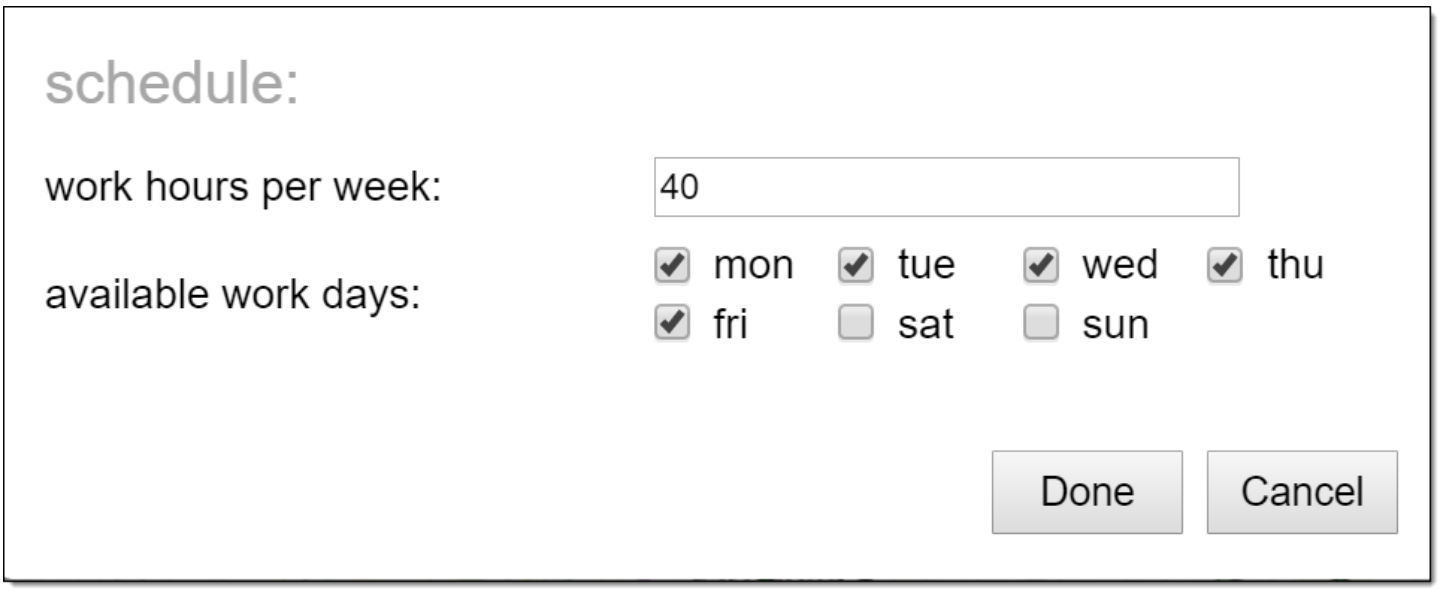


To use EasyTerritory Capacity Planning, perform the following steps:

- Query the features you want to analyze. This may be done using any of EasyTerritory's powerful querying capabilities (by ctrl-clicking on features; selecting by lasso, envelope or polygon).
- Click on the *partition* link in the results-grid – this will open an options dialog:

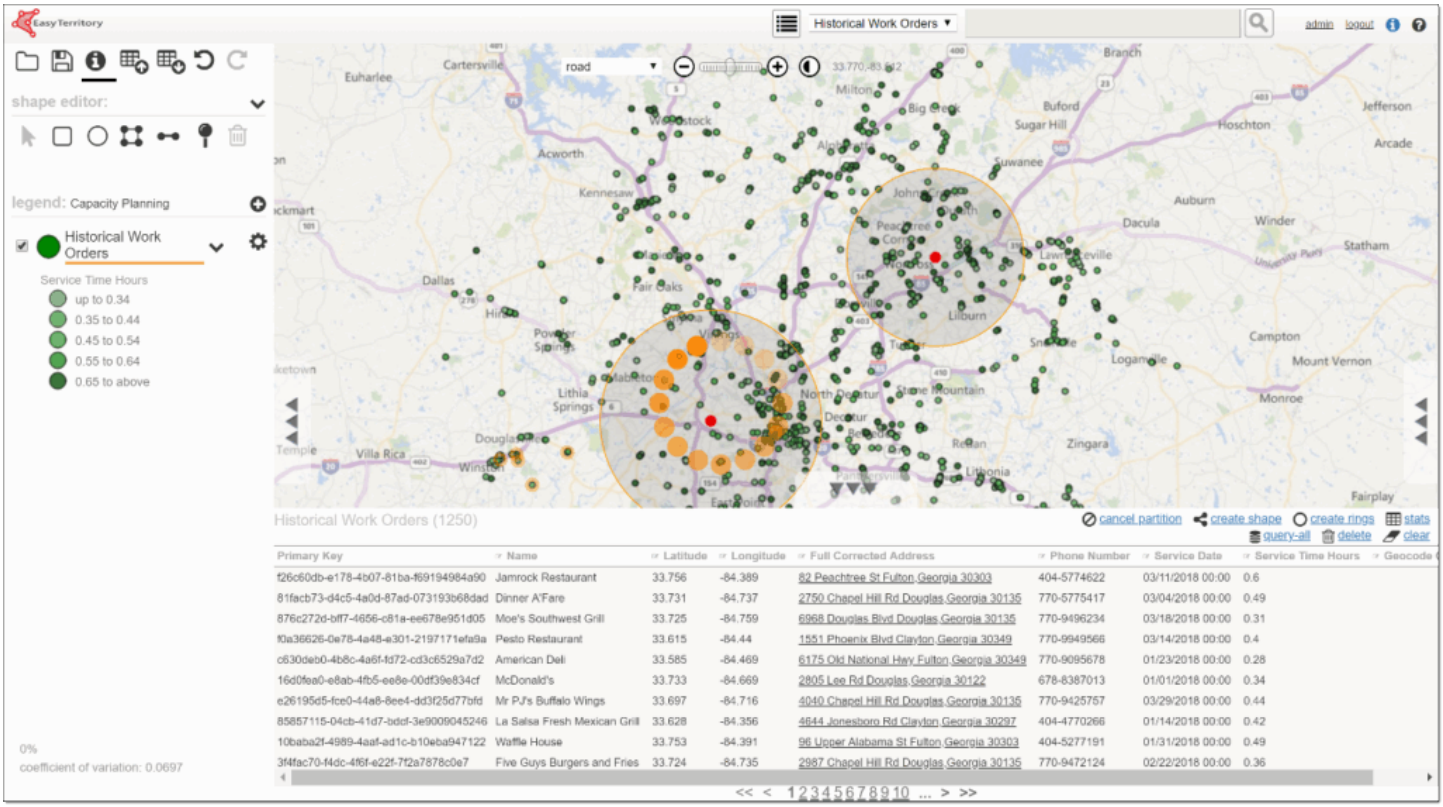


- Select the *create a capacity plan* option – this opens the scheduling dialog:



- Enter your scheduling criteria:
  - **Work hours per week** – this is the target number of hours you want each resource to work per week.
  - **Available work days** – these are the acceptable days to schedule work on

- Pressing “Done” will launch the CP process which can take minutes to hours to run depending on the scope of the analysis and the number of past days to consider. Each unique service day in the work order data is analyzed from oldest to most recent. On each day, the analysis will determine an optimal number of resources and assign an optimal service route to create a total effort for each resource. Once the day’s analysis is finished, the process moves to the next available day. The percentage complete in the lower-left is updated and the coefficient of variation shows how effectively the labor and driving time is distributed between the resources.



- The final results are presented in the statistics panel showing the total resource hours (service time and driving hours in this example) per service day optimized for driving time and workload distribution. A mean workload and standard deviation across the entire historical record is displayed at the bottom. From here you can export your analysis to a spreadsheet.

markup statistics:

	Historical Work Orders	
	Count	Service Time Hours
	All	All
Service Date:1/1/2018	15	9.418
Service Date:1/2/2018	13	9.972
Service Date:1/3/2018	7	4.606
Service Date:1/4/2018	14	10.209
Service Date:1/5/2018	10	6.639
Service Date:1/6/2018	14	10.515
Service Date:1/7/2018	15	10.826
Service Date:1/8/2018	14	10.358
Service Date:1/9/2018	8	5.073
Service Date:1/10/2018	13	8.969
Service Date:1/11/2018	11	8.051
Service Date:1/12/2018	19	14.804
Service Date:1/13/2018	15	9.885
Service Date:1/14/2018	24	17.326
Service Date:1/15/2018	8	6.141
Service Date:1/16/2018	20	15.307
Service Date:1/17/2018	12	8.756
Service Date:1/18/2018	12	8.462
Service Date:1/19/2018	15	12.163
Service Date:1/20/2018	15	11.186
Service Date:1/21/2018	9	6.689
Service Date:1/22/2018	15	9.739
new shape:	12	9.406
total	310	224.502
mean	13.478	9.761
std-dev	3.948	3.094

classifications: hide all

relative std-dev: -2 -1 0 +1 +2

Realign Export Done