

Ops Portal User Manual

Introduction

The Ops Portal is a platform designed for processing operational information at Lean Tech. It provides access to different modules that allow managing employees, accounts, assignments, exceptions, and human resources.

Accessing the Ops Portal

To access the Ops Portal, follow these steps:

1. Open your web browser and navigate to the Ops Portal URL.
<https://opsleantech.retool.com/>
2. Enter your login credentials provided by Lean Tech (Gmail SSO)
3. Click the login button to access the portal.

Employees module

Upon accessing the portal, you will be redirected to the "Employees" page, which contains a table with detailed information about each employee. This table displays the following data:

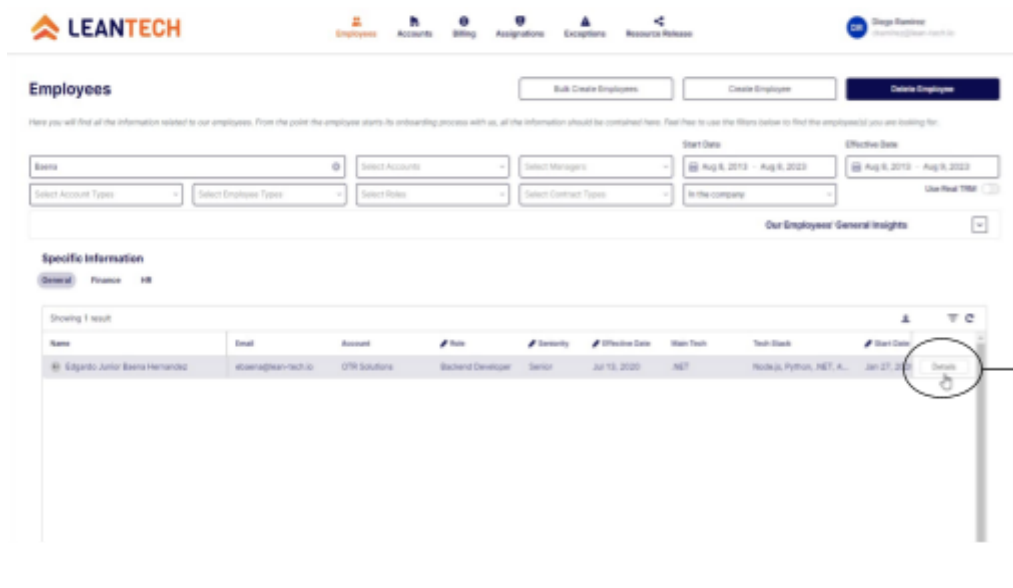
- General Information: Name, email, assigned account, role, seniority, start date, technical skills, start date on the account, contract type, and other relevant details.
- Financial Information: Salary, cost based on each assigned account, margin, and profit related to billing.
- Human Resources: Hiring date, place of residence, contact details, and other personal data.

Filters in Employees module

The "Employees" module features a set of filters that allow you to customize the displayed information. You can apply filters based on account type, start date, employee type, role, contract type, and employee status.

Employees Details

In the first option presented under "Specific Information," which is "General," we can view in the last column an option labeled "Details," where we can find more information about the selected employee.



By clicking the "Assignment History" button, you can view the account to which the employee belongs, the account type, role, and other related details.

Beneath this information, you'll find a section named "Actions Items," which corresponds to the recording of actions assigned to the previously selected employee for viewing their detailed information. Each action is linked to a specific status, and each entered record can be edited or deleted as needed by the user.



Employees
Accounts
Billing
Assignations
Exceptions
Resource Release

DR Diego Ramirez
dramirez@lean-tech.io

Action Items

Action	Description	Start Date	End Date	Status	Completed
English Training	English Course start...	Jun 1, 2023	Nov 30, 2023	In progress	

Showing 1 result Clear selection

Action: Soft Skills Training
Status: In progress

Action Date: Nov 30, 2023
☐ Completed

Description: English Course started. Requested by the customer

Add

Comments & Status

Date	User	Comment
Aug 8, 2023 5...	DR Diego Ramirez dramirez@lean...	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, q

Showing 1 result

Write a comment
Enter your comment

Add

The section labeled "Comments & Status" allows users to record comments regarding the selected employee from the list and the employee whose detailed information is being edited



Employees
Accounts
Billing
Assignations
Exceptions
Resource Release

DR Diego Ramirez
dramirez@lean-tech.io

Action Items

Action	Description	Start Date	End Date	Status	Completed
English Training	English Course start...	Jun 1, 2023	Nov 30, 2023	In progress	
Soft Skills Training	Soft Skills Training C...	Jul 1, 2023	Jul 31, 2023	Completed	✓

Showing 2 results Clear selection

Action: English Training
Status: In progress

Action Date: Jun 1, 2023 - Nov 30, 2023
☐ Completed

Description: English Course started. Requested by the customer

Add Update Delete

Comments & Status

Date	User	Comment
Aug 8, 2023 5...	DR Diego Ramirez dramirez@lean...	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, q

Showing 1 result

Write a comment
Enter your comment

Add

Accounts module

In the "Accounts" module, you will find a list of all companies or organizations with which Lean Tech has a commercial link or contractual agreement. The data included in this table are:

- Account Name.
- Current Status.
- Assigned Manager.
- Number of assigned and billable resources.
- Contractual linking date with Lean Tech.

Filters in "Accounts" Module

The Accounts module offers filters to classify accounts based on managers, account types, and billing periods.

Accounts Details



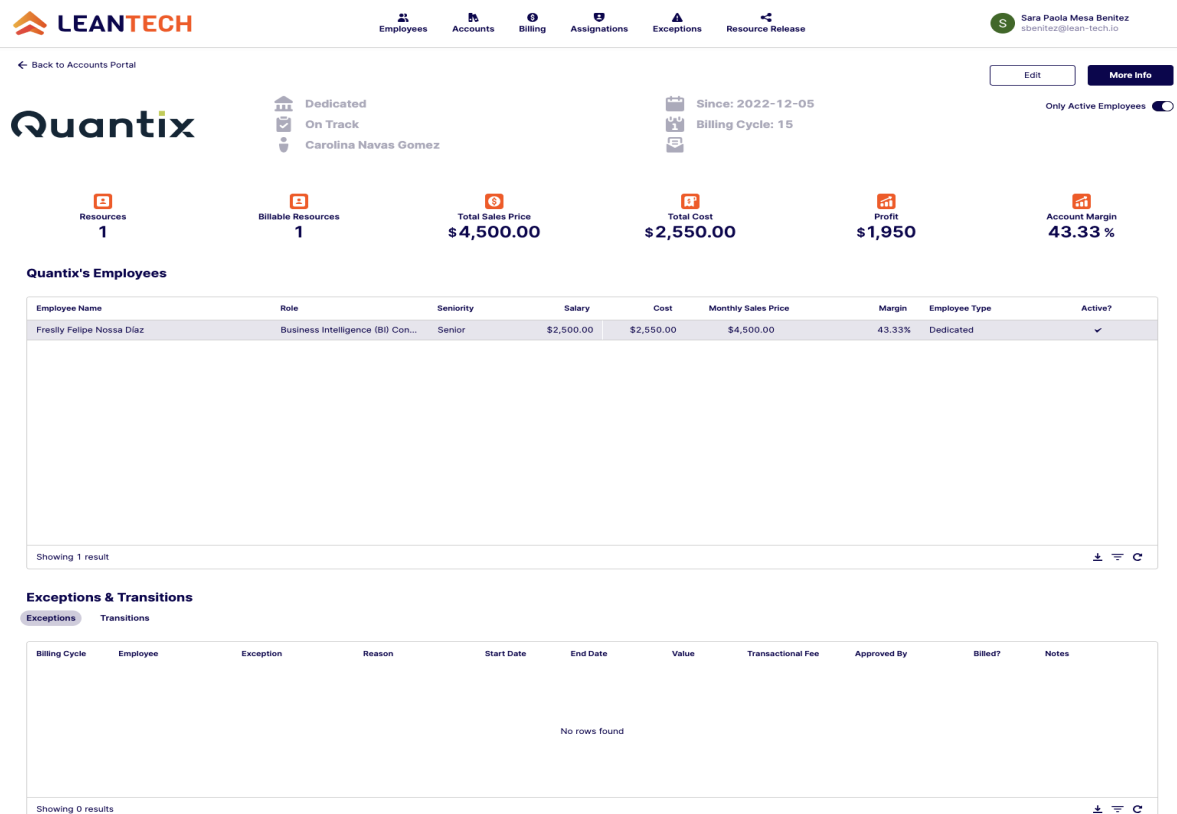
The screenshot shows the LEANTECH Accounts module interface. At the top, there's a navigation bar with icons for Employees, Accounts, Billing, Assignations, Exceptions, and Resource Release. The user profile 'Sara Paula Mesa Benitez' is visible in the top right. Below the navigation bar, the 'Accounts' section is active, showing a search bar with 'Quintix' entered, and filters for 'Select Managers' and 'Select Account Types'. A 'Start Date' filter is set to '01.01.2016' to '12.31.2023'. A toggle for 'Only Active Accounts' is present. Below the filters, there's a section for 'Our Account's General Insights'. The 'Specific Information' section is expanded, showing a table with 2 results. The table has columns for Account, Account Type, Status, Manager, Assigned Res., Billable Resources, Start Date, End Date, Description, and Company. The first row shows 'Quintix' with status 'Dedicated' and manager 'Carolina Neves Gomez'. The second row shows 'Quintix - A&R' with status 'Managed T.' and manager 'Luis Fernando Bedoya Martinez'. A 'Details' button is circled next to the second row.

Account	Account Type	Status	Manager	Assigned Res.	Billable Resources	Start Date	End Date	Description	Company
Quintix	Dedicated	On Track	Carolina Neves Gomez	1	1	Dec 5, 2022	--	--	Quintix
Quintix - A&R	Managed T.	On Track	Luis Fernando Bedoya Martinez	8	8	Feb 7, 2022	--	--	Quintix

At the outset, information pertaining to the selected account is displayed, including Account Type, Creation Date on the platform, Status, Mgr (Manager), and Billing Cycle.

Subsequently, the total number of assigned resources, billable resources, their cost, margin, and profit are shown.

The following list presents employees assigned to the selected account. Displayed data includes Name / Role / Seniority / Salary / Cost / and Monthly Sales Price.



LEANTECH

Employees Accounts Billing Assignations Exceptions Resource Release

Sara Paola Mesa Benitez
sbenitez@lean-tech.io

← Back to Accounts Portal

Quantix

Dedicated
On Track
Carolina Navas Gomez

Since: 2022-12-05
Billing Cycle: 15

Only Active Employees ☒

Resources: 1
Billable Resources: 1
Total Sales Price: \$4,500.00
Total Cost: \$2,550.00
Profit: \$1,950
Account Margin: 43.33 %

Quantix's Employees

Employee Name	Role	Seniority	Salary	Cost	Monthly Sales Price	Margin	Employee Type	Active?
Fresilly Felipe Nossa Diaz	Business Intelligence (BI) Con...	Senior	\$2,500.00	\$2,550.00	\$4,500.00	43.33%	Dedicated	✓

Showing 1 result

Exceptions & Transitions

Exceptions Transitions

Billing Cycle	Employee	Exception	Reason	Start Date	End Date	Value	Transactional Fee	Approved By	Billed?	Notes
No rows found										

Showing 0 results

Following this, Exceptions and Transitions are displayed, separated into tabs, which have been recorded for the selected account. These records have an impact on the Billing processes for the selected account's billing cycle, as applicable.

Billing Information

				Cumulative revenue \$29,534.00 Since January 2023				Next Bill \$4,500.00 September's Bill				
Billing Cycle	Account	Billable Resources	Fixed Price Total	Prorate	Overtime	Deduction	Dedicated Resources Total	Surcharge	Setup Fee	Augmented Services	Third Party Services	
Jan 15, 20...	Quantix	1	\$4,500.00	\$0.00	\$0.00	\$2,000.00	\$2,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Feb 15, 20...	Quantix	1	\$4,500.00	\$0.00	\$0.00	\$0.00	\$4,500.00	\$34.00	\$0.00	\$0.00	\$0.00	\$0.00
Mar 15, 2...	Quantix	1	\$4,500.00	\$0.00	\$0.00	\$0.00	\$4,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Apr 15, 20...	Quantix	1	\$4,500.00	\$0.00	\$0.00	\$0.00	\$4,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
May 15, 2...	Quantix	1	\$4,500.00	\$0.00	\$0.00	\$0.00	\$4,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Jun 15, 20...	Quantix	1	\$4,500.00	\$0.00	\$0.00	\$0.00	\$4,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Jul 15, 20...	Quantix	1	\$4,500.00	\$0.00	\$0.00	\$0.00	\$4,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Showing 7 results												⌵ ⌵ ⌵

Action Items

Action	Date ↑	Description	Status
No action items added yet			

Showing 0 results

Action

Select an option

Status

Select an option

Action Date

Aug 8, 2023

Description

Enter the action description

Add

Update

Delete

Comments

Date	User	Comment
No comments added yet		

Showing 0 results

Write a comment

Enter value

Add

Next is the summary of accumulated profits from January 2023 to the present date for each of the invoices issued to the selected account, along with the value to be invoiced in the upcoming cycle. Below this, the details of invoices issued in the last 7 months are provided, with all relevant values displayed in each column at the time of issuance.

Lastly, there are the sections for Actions and Comments, which are the only user-interactive processes on this page. All other sections are for reading only. Account data editing is carried out through the "Edit" button displayed at the beginning of the page.

Assignations module

The "Assignations" module serves as a pivotal hub for managing employee allocations within Lean Tech's operational landscape. It provides a comprehensive history of employee assignments, showcasing the dynamic nature of roles undertaken by individuals across various projects and accounts.

This module offers a user-friendly interface that empowers you to create, edit, and update assignments with ease. Whether aligning resources with account-specific needs or tailoring assignments to individual skills, this module ensures seamless synchronization between human resources and project demands.

The "Assignment History" feature provides a clear trajectory of each employee's journey, enhancing decision-making by offering a transparent view of their contributions.

Filters enable precise searches, aiding in refined assignment customization based on criteria such as account type, start date, employee role, and contract type.

In essence, the "Assignations" module optimizes resource allocation, fosters collaboration between individuals and projects.





[Employees](#)
[Accounts](#)
[Billing](#)
[Assignations](#)
[Exceptions](#)
[Resource Release](#)

Sara Paola Mesa Benitez
sbenitez@lean-tech.io

Assignations

Showing 543 results

Name	Account	Allocation	Monthly Sal...	Start date	Effective date	End date
☐ Abner Alberto Reyes Bernal	CWS - Capston...	100%	\$3,643	Apr 18, 2022	May 2, 2022	-
☐ Abraham Anibal Ortega Molina	Warrior Network	100%	\$0	Sep 22, 2020	Mar 27, 2023	-
☐ Abraham José Janna Díaz	Manuseto Vent...	100%	\$5,000	Jul 18, 2022	Apr 17, 2023	-
☐ Alan Morais Filho	Advent e-Modal	100%	\$6,900	Oct 3, 2022	Oct 3, 2022	-
☐ Albert Klabord Consuegra Newball	Trimble - Chen...	100%	\$2,875	Sep 19, 2022	Sep 19, 2022	-
☐ Alberto Mario Ahumada Cabrera	Operations	100%	\$0	Mar 1, 2023	Mar 1, 2023	-
☐ Alberto Sánchez Jimenez	Edge Logistics	100%	\$5,451	May 3, 2021	May 4, 2021	-
☐ Aldair Bernal Belarour	Loadsure	100%	\$7,408	Mar 27, 2023	Mar 27, 2023	-
☐ Alejandra Monterroza Mendoza	Dedicated	100%	\$0	Feb 27, 2023	Feb 27, 2023	-
☐ Alejandro Abraham Jacobo González	NMFTA	100%	\$6,900	Mar 27, 2023	Mar 27, 2023	-
☐ Alejandro Castaño Palacio	Veriha	100%	\$4,999	Jan 18, 2021	Jan 18, 2021	-
☐ Alejandro Pantoja Valdivia	Artiva	100%	\$7,835	Jun 15, 2021	Jul 8, 2021	-

Create Update

Assignment

Select an Account

Select an Area

Effective date

Allocation 100.0%

Last date

Optional

Monthly Sales Price \$ 0.00

Is billable?

Finish selected active assignments

Notes

Create

Assignations History

Showing 492 results

Name	Account	Allocation	Effective date	End date	Monthly sales price	Billable	Active	Notes
Daniel Morales Londoño	Ludus - Continuous Improvement	100%	Jan 24, 2022	May 16, 2022	\$0.00	-	X	-
Christian David Suarez Reina	Edge Logistics	100%	Jul 1, 2019	Jan 26, 2022	\$3,312.00	-	X	-
Abraham Ysidro Kamei Palano	Transitory Team	100%	Jul 3, 2023	Jul 18, 2023	\$0.00	-	X	-
Luis Miguel Blanco Veilla	Transitory Team	100%	May 5, 2023	May 19, 2023	\$3,555.00	-	X	-
Ely Marcela Mejía Campo	Transitory Team	100%	Mar 28, 2023	Apr 27, 2023	\$0.00	-	X	-
Camilo Andres Hernandez Cadavid	Edge Logistics	100%	Aug 21, 2019	Jan 28, 2022	\$3,881.00	-	X	-
Mateo Villa Flores	Ascend TMS	100%	Oct 1, 2020	Jun 11, 2021	\$5,833.00	-	X	-
Andres De Jesus Marrugo Peralta	StarkCore TMS V2	100%	Aug 25, 2021	Sep 23, 2022	\$0.00	-	X	-
Johan Esteban Zapata Herrera	Shockbox	100%	Dec 6, 2021	May 2, 2022	\$0.00	-	X	-
Kevin David Melan Carlin	Bluegrace	100%	Jul 19, 2021	Aug 13, 2021	\$3,750.00	-	X	-
David Muñoz Mato	QA	100%	Oct 16, 2019	Jul 9, 2021	\$0.00	-	X	-
Andres Camilo Paez Rios	DevOps	100%	Oct 21, 2019	Jul 23, 2021	\$0.00	-	X	-
Pablo Arango Bustamante	Freight Pros	100%	Nov 30, 2020	May 26, 2021	\$0.00	-	X	-
Diego Alejandro Agudelo Lugo	Lean Staffing Solutions	100%	Dec 3, 2019	Oct 6, 2021	\$3,583.00	-	X	-

Exceptions module

The "Exceptions" module provides comprehensive management for exceptions associated with employees assigned to accounts within the operations portal. You can efficiently load and list exceptions by their type, observing their approval status in this initial session. All employees linked to their respective accounts are displayed, alongside a historical record of registered exceptions.

Moreover, the module presents the approval status of each exception, determined by the leader and back-office approval.

In this same interface, you also possess the capability to generate these exceptions. These exceptions seamlessly integrate into the billing process, aligning with the billing cycle specific to the account.

Furthermore, you can conveniently establish payroll novelties directly from this portal. Beneath this section, you can access historical records of payroll novelties registered for each employee within this interface.





[Employees](#)
[Accounts](#)
[Billing](#)
[Assignations](#)
[Exceptions](#)
[Resource Release](#)

Sara Paola Mesa Benitez
sbenitez@lean-tech.co

Exceptions

Showing 536 results

Name	ID number	Account	Contract type	Currency	Salary
Abner Alberto Reyes Bernal	REBA940627HT...	CWS - Capstone Logistics	US Contractor	USD	\$1,400
Abraham Anibal Ortega Molina	1143169943	Warrior Network	US Contractor	USD	\$2,600
Abraham José Janna Díaz	1047456220	Mansueto Ventures	US Contractor	USD	\$1,400
Alan Morales Rábalo	39727196692	Advent e-Modal	US Contractor	USD	\$4,500
Albert Kibord Consuegra Newball	8788943	Trimble - Cheng Lo	US Contractor	USD	\$1,250
Alberto Mario Alzamada Cabrera	1001941021	Operations	Basic	COP	\$1,160,000
Alberto Sanchez Jimenez	1045725855	Edge Logistics	US Contractor	USD	\$2,300
Aldar Bernal Betancur	1068330977	Loadsure	US Contractor	USD	\$3,800
Alejandra Montenegro Mendoza	1017255496	Dedicated	Basic	COP	\$3,500,000
Alejandro Abraham Jacobo González	JAGA910307HG...	NMFTA	US Contractor	USD	\$3,700
Alejandro Castaño Palacio	1036958080	Veriha	US Contractor	USD	\$3,450
Alejandro Padilla Valderrama	1030742376	Arrive	US Contractor	USD	\$4,200
Alejandro Riveros Estupigán	1144099208	Project44 - Support & Im...	US Contractor	USD	\$3,570
Alexander Barrios Silva	1094925084	Ludus - R&D	US Contractor	USD	\$1,404
Alexander Taborda Acosta	1045717291	White Arrow	US Contractor	USD	\$5,200
Alexis Jesus Reyes Garcia	2395298	Intelligent Audit	US Contractor	USD	\$2,300

Create Exception

Create Payroll Novelty

Exception

Select an Exception

Select a Reason

Select a Cycle

Approved by

Start date

End date

Amount *

\$ 0.00

Transactional Fee *

0%

Total

\$ 0.00

Is billed?

Payroll novelty?

Notes

Enter value

Update

Add

Exceptions List

Showing 223 results

Name	Exception	Cycle	Account	Reason	Start date	End date	Amount	Trans. Fee	Total	Leader Appr.	Approve...	Billed	BO Appr.
Abdul Wahab Shariff	Termination Fee	Jul 1, 2023	Arrive	Customer Request	Jun 30, 20...	Jun 30, 20...	\$3,438...	0%	\$3,438...	Pending	-	Pending	Pending
Abner Alberto Reyes Bernal	On Call Bonus	Jul 1, 2023	CWS - Capston...	Customer Request	Jun 26, 20...	Jun 26, 20...	\$1,010...	0%	\$1,010...	Pending	-	Pending	Pending
Abner Alberto Reyes Bernal	On Call Bonus	Aug 1, 2023	CWS - Capston...	Customer Request	Jul 4, 2023	Jul 4, 2023	\$506.00	0%	\$506.00	Pending	-	Approved	Approved
Abraham Yaeli Kaniel Pajaro	Termination Fee	Jul 1, 2023	Arrive	Customer Request	Jun 30, 20...	Jun 30, 20...	\$3,927...	0%	\$3,927...	Pending	-	Pending	Pending
Albert Kibord Consuegra Ne...	Extra Time	Jul 1, 2023	Trimble - Chen...	Customer Request	Jun 9, 2023	Jun 9, 2023	\$204.00	0%	\$204.00	Pending	-	Pending	Pending
Albert Kibord Consuegra Ne...	Extra Time	Aug 1, 2023	Trimble - Chen...	Customer Request	Jul 19, 2023	Jul 19, 2023	\$112.00	0%	\$112.00	Pending	-	Approved	Approved
Aldar Bernal Betancur	Reimbursement	Jul 1, 2023	Loadsure	Customer Request	Jun 1, 2023	Jun 1, 2023	\$20.00	0%	\$20.00	Pending	-	Pending	Pending
Aldar Bernal Betancur	Customer Lunch	Jul 1, 2023	Loadsure	Customer Request	Jun 27, 20...	Jun 27, 20...	\$10.00	0%	\$10.00	Pending	-	Pending	Pending
Aldar Bernal Betancur	Customer Lunch	Aug 1, 2023	Loadsure	Customer Request	Jul 25, 2023	Jul 25, 2023	\$10.00	12%	\$11.20	Pending	-	Approved	Approved
Alejandro Padilla Valderrama	Travel Expenses	Aug 1, 2023	Arrive	Customer Request	Jul 28, 2023	Jul 28, 2023	\$480.00	12%	\$537.60	Pending	-	Approved	Approved
Alexander Arango Garces	Termination Fee	Jul 1, 2023	Arrive	Customer Request	Jun 30, 20...	Jun 30, 20...	\$3,188...	0%	\$3,188...	Pending	-	Pending	Pending
Alexander Taborda Acosta	Customer Bon...	Jul 1, 2023	White Arrow	Customer Request	Jun 27, 20...	Jun 27, 20...	\$217.28	12%	\$243.35	Pending	-	Pending	Pending
Alexander Taborda Acosta	Customer Bon...	Aug 1, 2023	White Arrow	Customer Request	Jul 19, 2023	Jul 19, 2023	\$217.00	12%	\$243.04	Pending	-	Approved	Approved

Payroll Novelty List

Showing 223 results

Name	Exception	Cycle	Account	Reason	Start date	End date	Amount	Trans. Fee	Total	Leader Appr.	Approve...	Billed	BO Appr.
Abdul Wahab Shariff	Termination Fee	Jul 1, 2023	Arrive	Customer Request	Jun 30, 20...	Jun 30, 20...	\$3,438...	0%	\$3,438...	Pending	-	Pending	Pending
Abner Alberto Reyes Bernal	On Call Bonus	Jul 1, 2023	CWS - Capston...	Customer Request	Jun 26, 20...	Jun 26, 20...	\$1,010...	0%	\$1,010...	Pending	-	Pending	Pending
Abner Alberto Reyes Bernal	On Call Bonus	Aug 1, 2023	CWS - Capston...	Customer Request	Jul 4, 2023	Jul 4, 2023	\$506.00	0%	\$506.00	Pending	-	Approved	Approved
Abraham Yaeli Kaniel Pajaro	Termination Fee	Jul 1, 2023	Arrive	Customer Request	Jun 30, 20...	Jun 30, 20...	\$3,927...	0%	\$3,927...	Pending	-	Pending	Pending
Albert Kibord Consuegra Ne...	Extra Time	Jul 1, 2023	Trimble - Chen...	Customer Request	Jun 9, 2023	Jun 9, 2023	\$204.00	0%	\$204.00	Pending	-	Pending	Pending
Albert Kibord Consuegra Ne...	Extra Time	Aug 1, 2023	Trimble - Chen...	Customer Request	Jul 19, 2023	Jul 19, 2023	\$112.00	0%	\$112.00	Pending	-	Approved	Approved
Aldar Bernal Betancur	Reimbursement	Jul 1, 2023	Loadsure	Customer Request	Jun 1, 2023	Jun 1, 2023	\$20.00	0%	\$20.00	Pending	-	Pending	Pending
Aldar Bernal Betancur	Customer Lunch	Jul 1, 2023	Loadsure	Customer Request	Jun 27, 20...	Jun 27, 20...	\$10.00	0%	\$10.00	Pending	-	Pending	Pending
Aldar Bernal Betancur	Customer Lunch	Aug 1, 2023	Loadsure	Customer Request	Jul 25, 2023	Jul 25, 2023	\$10.00	12%	\$11.20	Pending	-	Approved	Approved
Alejandro Padilla Valderrama	Travel Expenses	Aug 1, 2023	Arrive	Customer Request	Jul 28, 2023	Jul 28, 2023	\$480.00	12%	\$537.60	Pending	-	Approved	Approved
Alexander Arango Garces	Termination Fee	Jul 1, 2023	Arrive	Customer Request	Jun 30, 20...	Jun 30, 20...	\$3,188...	0%	\$3,188...	Pending	-	Pending	Pending
Alexander Taborda Acosta	Customer Bon...	Jul 1, 2023	White Arrow	Customer Request	Jun 27, 20...	Jun 27, 20...	\$217.28	12%	\$243.35	Pending	-	Pending	Pending
Alexander Taborda Acosta	Customer Bon...	Aug 1, 2023	White Arrow	Customer Request	Jul 19, 2023	Jul 19, 2023	\$217.00	12%	\$243.04	Pending	-	Approved	Approved

Resource Release Module

The "Resource Release" module streamlines payroll novelties for efficient financial operations. It provides a clear platform to manage compensation adjustments, simplifying processes and ensuring accuracy. This module showcases historical records of novelties, offering insights into compensation changes and related actions for each employee.

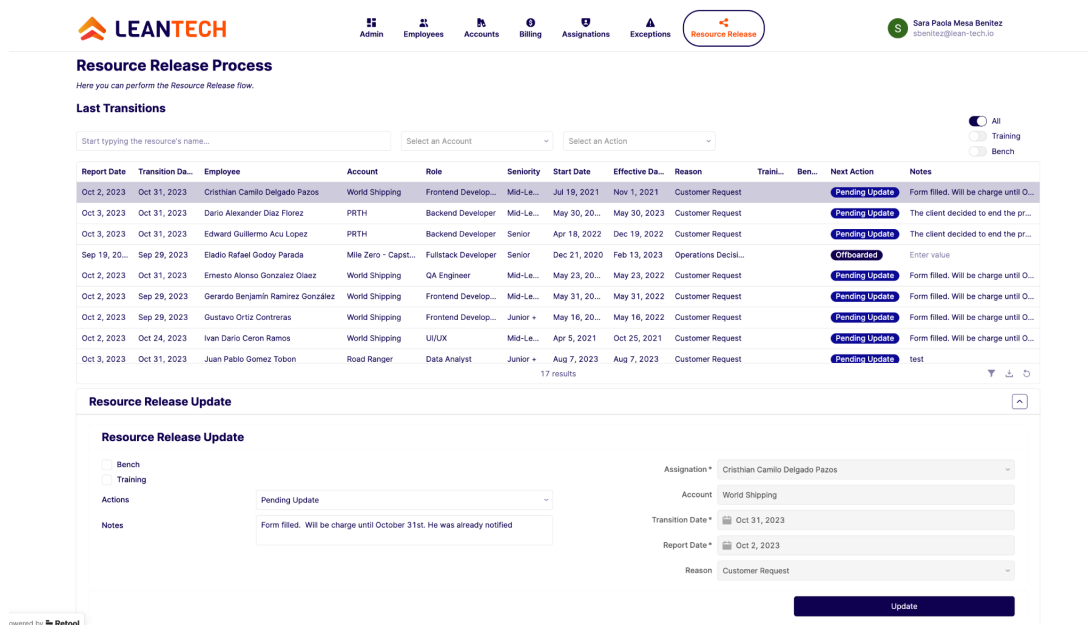
With user-friendly controls, you can effortlessly initiate payroll novelties to align remuneration with performance and role adjustments. By bridging human resources and financial operations, this module ensures precise compensation management, legal compliance, and organizational transparency.

Viewing Available Resources and Modifying Collaborator Records

In the Backoffice portal, on the "Resource Release" page, you'll find a list of resources available for release under the "Assignment" tab. With the "Resource Release" view, modifying collaborator records is simple:

1. Select the new record and click on the "Save" option to save the changes.
2. Upon selecting a collaborator's record, a panel will appear displaying the collaborator's data and any attached notes if they exist.
3. Additionally, another panel will automatically appear at the bottom of the page, adjusting based on the selected record type, such as "offboarding." Here, you can set the "end date," which corresponds to the previous assignment of the individual. This information will be updated directly in the assignment section.

In the following example, we can see that the collaborator Cristhian Delgado had a record of "pending update."



The screenshot shows the LEANTECH Resource Release Process interface. At the top, there's a navigation bar with icons for Admin, Employees, Accounts, Billing, Assignations, Exceptions, and Resource Release (highlighted). Below the navigation bar, the page title is "Resource Release Process" with a subtitle "Here you can perform the Resource Release flow." Underneath, there's a section for "Last Transitions" with a search bar and filters. A table lists various resource release records with columns for Report Date, Transition Date, Employee, Account, Role, Seniority, Start Date, Effective Date, Reason, Train..., Ben..., Next Action, and Notes. The record for Cristhian Camilo Delgado Pazos is highlighted, showing a "Pending Update" status. Below the table, there's a "Resource Release Update" section with a form to edit the record. The form includes fields for Assignment, Account, Transition Date, Report Date, and Reason, along with a "Pending Update" status and a "Form filled. Will be charge until October 31st. He was already notified" note. An "Update" button is at the bottom right.

Report Date	Transition Da...	Employee	Account	Role	Seniority	Start Date	Effective Da...	Reason	Train...	Ben...	Next Action	Notes
Oct 2, 2023	Oct 31, 2023	Cristhian Camilo Delgado Pazos	World Shipping	Frontend Develop...	Mid-Le...	Jul 19, 2021	Nov 1, 2021	Customer Request			Pending Update	Form filled. Will be charge until O...
Oct 3, 2023	Oct 31, 2023	Dario Alexander Diaz Florez	PRTH	Backend Developer	Mid-Le...	May 30, 20...	May 30, 2023	Customer Request			Pending Update	The client decided to end the pr...
Oct 3, 2023	Oct 31, 2023	Edward Guillermo Acu Lopez	PRTH	Backend Developer	Senior	Apr 18, 2022	Dec 19, 2022	Customer Request			Pending Update	The client decided to end the pr...
Sep 19, 20...	Sep 29, 2023	Eladio Rafael Godoy Parada	Mila Zero - Capst...	Fullstack Developer	Senior	Dec 21, 2020	Feb 13, 2023	Operations Decis...			Offboarded	Enter value
Oct 2, 2023	Oct 31, 2023	Ernesto Alonso Gonzalez Olaz...	World Shipping	QA Engineer	Mid-Le...	May 23, 20...	May 23, 2022	Customer Request			Pending Update	Form filled. Will be charge until O...
Oct 2, 2023	Sep 29, 2023	Gerardo Benjamín Ramirez González	World Shipping	Frontend Develop...	Mid-Le...	May 31, 20...	May 31, 2022	Customer Request			Pending Update	Form filled. Will be charge until O...
Oct 2, 2023	Sep 29, 2023	Gustavo Ortiz Contreras	World Shipping	Frontend Develop...	Junior +	May 16, 20...	May 16, 2022	Customer Request			Pending Update	Form filled. Will be charge until O...
Oct 2, 2023	Oct 24, 2023	Ivan Dario Ceron Ramos	World Shipping	UI/UX	Mid-Le...	Apr 5, 2021	Oct 25, 2021	Customer Request			Pending Update	Form filled. Will be charge until O...
Oct 3, 2023	Oct 31, 2023	Juan Pablo Gomez Tobon	Road Ranger	Data Analyst	Junior +	Aug 7, 2023	Aug 7, 2023	Customer Request			Pending Update	test

17 results

Resource Release Update

Resource Release Update

☐ Bench
☐ Training

Actions: Pending Update

Notes: Form filled. Will be charge until October 31st. He was already notified

Assignment: Cristhian Camilo Delgado Pazos

Account: World Shipping

Transition Date: Oct 31, 2023

Report Date: Oct 2, 2023

Reason: Customer Request

Update

When changing his record to "offboarding," we automatically see a section where we can edit the "end date" and attach notes if deemed necessary.

Resource Release Process

Here you can perform the Resource Release flow.

Last Transitions

Report Date	Transition Da...	Employee	Account	Role	Seniority	Start Date	Effective Da...	Reason	Training	Ben...	Next Action	Notes
Oct 2, 2023	Oct 31, 2023	Cristhian Camilo Delgado Pazos	World Shipping	Frontend Develop...	Mid-Le...	Jul 19, 2021	Nov 1, 2021	Customer Request			Offboarding	Enter value
Oct 3, 2023	Oct 31, 2023	Dario Alexander Diaz Florez	PRTH	Backend Developer	Mid-Le...	May 30, 20...	May 30, 2023	Customer Request			Pending Update	The client decided to end the pr...
Oct 3, 2023	Oct 31, 2023	Edward Guillermo Acu Lopez	PRTH	Backend Developer	Senior	Apr 18, 2022	Dec 19, 2022	Customer Request			Pending Update	The client decided to end the pr...
Sep 19, 20...	Sep 29, 2023	Eladio Rafael Godoy Parada	Mile Zero - Capst...	Fullstack Developer	Senior	Dec 21, 2020	Feb 13, 2023	Operations Decision			Offboarded	Enter value
Oct 2, 2023	Oct 31, 2023	Ernesto Alonso Gonzalez Olaz	World Shipping	QA Engineer	Mid-Le...	May 23, 20...	May 23, 2022	Customer Request			Pending Update	Form filled. Will be charge until ...
Oct 2, 2023	Sep 29, 2023	Gerardo Benjamin Ramirez González	World Shipping	Frontend Develop...	Mid-Le...	May 31, 20...	May 31, 2022	Customer Request			Pending Update	Form filled. Will be charge until ...
Oct 2, 2023	Sep 29, 2023	Gustavo Ortiz Contreras	World Shipping	Frontend Develop...	Junior +	May 16, 20...	May 16, 2022	Customer Request			Pending Update	Form filled. Will be charge until ...
Oct 2, 2023	Oct 24, 2023	Ivan Dario Ceron Ramos	World Shipping	UI/UX	Mid-Le...	Apr 5, 2021	Oct 25, 2021	Customer Request			Pending Update	Form filled. Will be charge until ...
Oct 3, 2023	Oct 31, 2023	Juan Pablo Gomez Tobon	Road Ranger	Data Analyst	Junior +	Aug 7, 2023	Aug 7, 2023	Customer Request			Pending Update	test

Resource Release Update

Resource Release Update

☐ Bench
☐ Training

Actions

Offboarding

Notes

To have in mind...

Assignment * Cristhian Camilo Delgado Pazos

Account World Shipping

Transition Date * Oct 31, 2023

Report Date * Oct 2, 2023

Reason Customer Request

Update

Transitory Team Training New Account **Offboarding**

End Date Oct 4, 2023

Assignment

Cristhian Camilo Delgado Pazos

Notes

Enter value

Account

World Shipping

Submit

Manager's Role in the 'Resource Release' Process

Within the "Resource Release" feature, Account Managers play a pivotal role:

1. Managers log into the portal and can add individuals to the system. If adding several individuals, they can conveniently use the "add to list" option to streamline the process.
2. Managers have the flexibility to modify individual information as needed.
3. After making updates, Managers proceed to the "confirm release" stage. Here, they can include specific notes for each person and view automatically generated email addresses for notifications.
4. If further information or additional notes are required, Managers can easily add them or copy and paste previously entered notes.

Backoffice's Role

After the Manager's release, Backoffice takes over:

1. Backoffice accesses the "Resource Release" portal to review all the notes added by Managers.
2. This valuable information allows Backoffice to make informed decisions and updates for each individual, including actions like assigning someone to a new account or adjusting start and end dates to ensure accurate record-keeping and operational efficiency.

Billing module

The "Billing" module is where the entire billing process takes place. It displays general insights into all existing accounts in the operations platform, with preliminary data for projection. You can filter insights based on account type, manager, or billing cycles.

Billing Process

To initiate the billing process:

1. Click the "Start Billing" button.
2. Select the desired billing cycle.
3. Review the employees and values to be included in the invoice for the selected cycle.

Billing History

Here you will find all the information related to the historic general information related to

Select Accounts Select Account Types

Let's begin selecting a billing cycle:

Billing Cycle 2023-08-1

Start Billing

Start Billing

Both 1st 15th

Real TRM

General Insights



Comparison between periods

Showing 19 results

P&L	Cost Center	Area	Revenue &	Prev. Revenue	Revenue %...	Cost	Prev. Cost	Cost %Var.
COGS	Cost of Labor...	Dedicated	\$2,315,541.00	\$2,287,600.00	1.221%	\$1,432,412.00	\$1,385,636.80	3.376%
Dedica...	Payroll Lean ...	Dedicated...	\$94,547.00	\$99,180.00	-4.671%	\$106,132.00	\$106,184.00	-0.049%
Overhe...	Payroll Lean ...	Operations	\$16,807.00	\$84,994.00	-80.226%	\$159,099.00	\$132,298.80	20.257%
Training	Payroll Lean ...	Training	\$0.00	\$0.00	-	\$18,326.00	\$4,193.20	337.041%
Training	Payroll Lean ...	TechLab Tr...	\$0.00	\$8,500.00	-100%	\$4,678.00	\$6,550.00	-28.58%
Overhe...	Payroll Lean ...	Placement	\$0.00	\$0.00	-	\$13,314.00	\$12,549.00	6.096%
Overhe...	Payroll Lean ...	Training O...	\$0.00	\$0.00	-	\$5,533.00	\$5,113.00	8.214%
Overhe...	Payroll Lean ...	TechLab O...	\$0.00	\$0.00	-	\$11,183.00	\$10,511.00	6.393%

Projections

Accounts
162
Billable Seats
444
Revenue
\$2,458,276.00
Cost
\$1,921,695.33
Overhead
\$12,108.00
Margin
21.8%

Billing Process

Here you can perform the billing procedure.

Start typing the account's name.

Select an Account Type

You are currently working on the billing cycle 2023-08-15.

Change Cycle

Showing 48 results

Account	Manager	Account Type	Assigned Resources	Billable Resources	Notes	Bill Status
PRC One	Alejandra Montemayor Mendez	Dedicated	1	1	-	-
JK Moving	Alejandra Montemayor Mendez	Dedicated	5	5	-	-
PRTH	Alejandra Montemayor Mendez	Dedicated	8	8	-	-
Trilex Transportation	Alejandra Montemayor Mendez	Dedicated	2	2	-	-
Arbitria	Alejandra Montemayor Mendez	Dedicated	1	1	-	-
Verite	Alejandra Montemayor Mendez	Dedicated	1	1	-	-
Gravel	Alejandra Montemayor Mendez	Dedicated	-	-	-	-
Customer Portal - Tucker Support	Carlos Mario Herrera Paredes	Augmented Services	-	-	-	-
Qualified Centers - Tucker Support	Carlos Mario Herrera Paredes	Augmented Services	-	-	-	-

Account Bill Preview

Fixed Price Total

\$0

Hourly

\$0.00

Overhead

\$0.00

DEDUCTED

\$0.00

Discount

\$0.00

Discount

\$0.00

Setup Fee

\$0.00

OTHERS

\$0.00

Surcharge

\$0.00

Augmented Services

\$0.00

Other

\$0.00

Headcount to be added to the bill

Review

Employee	Account	Employee Role	Security	Start date	Effective date	Salary	Cost	Monthly Salary
0 results								
Showing 0 results								
No rows found								
Showing 0 results								
No rows found								

Last Headcount

0

Last Dedicated Charges

\$0

Last Other Charges

\$0

Month

0

1

2

3

4

5

Summary and Confirmation

Below is the information that will be printed in the Lean Tech Billing spreadsheet. Please take into account that every time you press print you'll be overwriting the information in the file.

PLEASE PRINT BY BILLING

Employees to be billed

Please select an account

Showing 0 results

1 of 1

Print Bill

Delete Bill

Conclusion

The Lean Tech Ops Portal offers an intuitive and comprehensive interface for operations management. Use the various modules and filters to obtain specific information about employees, accounts, assignments, exceptions, and billing processes.

We hope this manual helps you make the most of Ops Portal's functionalities. If you have any questions or issues, feel free to contact Lean Tech's technical support team.

Thank you for using Ops Portal and contributing to the success of Lean Tech!