Employee Utilization Dashboard - Analyzing Performance

The Employee Utilization Dashboard provides an interactive view of the same information found in the Employee Time Management Reports. Agency leaders can review employee productivity and realization information in real-time by month or by year without running a single report.

With the ability to drill down to details, the Employee Utilization Dashboard allows for analysis of summary and detail-level data without running and comparing multiple reports.

Select the Finance button on the Main Menu.

Hover over the Dashboards button to access the Employee Utilization application.

When initially accessing the Employee Utilization application, it will display the current and previous year’s Direct and Non Direct time by Office and by Department.

To gather the most recent information, click the ‘Refresh Data’ button. This will display current Productivity and Realization information within the dashboard. Data only needs to be refreshed when the data has changed. This will be the most time-consuming process that takes place within the Dashboard, so we recommend updating no more than once per day, unless necessary. Once data is refreshed, the Dashboard displays that data in multiple formats on various pages.

* Refreshing the data may be done at any time from the ‘Selection’ button on either Productivity or Realization or when initially accessing the Employee Utilization dashboard.

Setup

- Posting Periods - Must be established for the entire year in order in the General Ledger/Posting Period Maintenance application. Posting periods can be created and remain closed.
- Required Hours - In order to compare to required hours, enter the number of hours expected for each day of the week in Employee Maintenance. The daily hours worked settings are used and holidays are automatically deducted from the total.
- Billable Hours Goal - In order to compare billable hours to goal, enter the Billable Hours Goal for each employee in Employee Maintenance.

Selection

The Employee Utilization toolbar allows for the type of information to be selected (Productivity or Realization), and which year, month(s) and employee(s) are to be displayed, defaulting to Productivity.
Under the Employee Utilization toolbar, filters for Office, Department and Employee are available.

**Office** – The Office selection displays all offices available and initially defaults to ‘All Offices’. To view information for a specific office, select an Office from the list of offices in the Office selection box.
- Selection of an office will then limit the available Departments and Employees displayed for further selection.
- The offices available for selection may be limited based, on Employee Office Security.

**Department** – The Department selection displays all departments available and initially defaults to ‘All Departments’. To view information for a specific department, select a Department from the list of departments in the Department selection box.
- This list of departments available may be limited due to the Office selected above.

**Employee** - Select all employees or an employee in the Employee selection box. To view for all employees, click the ‘All Employees’ in the Employee dropdown.
- To include employees that have been terminated in the employee selection list, check the ‘Include Terminated Employees’ checkbox.
- To view an individual employee, click on the ‘secondary’ dropdown arrow and select the employee.
- The list of employees available may be limited based on the Office and Department selected above.
- The employees available for selection may be limited based, on Limit User Clients/Product Security.

On the **Realization filter**, there is an additional selection option on the Employee selection box to display the billed hours based on either the ‘Date Entered’ or the ‘Period Billed’. This display option will be defaulted to ‘Display Billed Hours based on the Date Entered’. This option is only available when an Employee has not been selected in the Productivity filter.

**Note:** An employee selection (or ALL Employees) is required to view the Productivity and Realization detailed information.

**Security**
The following Security standards apply to the Employee Utilization:
- **Employee Office** (Advantage | Maintenance | Security Setup | Employee Office)
- **Limit User Clients/Products** (Advantage | Maintenance | Security Setup | Security)
- **Limit User Employee Codes** (Advantage | Maintenance | Security Setup | Security)
- **Group Application Security** (Webvantage | Security | Group Application Security)
  - (Finance) – Employee Utilization – Productivity
  - (Finance) – Employee Utilization - Realization (Includes Fee Snapshot)
Notes:
All dashboard objects can be printed as displayed by clicking the (Print) icon on the toolbar.

To refresh the dashboard, on the toolbar click on the (Selection) button and then on the (Refresh Data) button.

Productivity
Summary
Once all filters have been selected, the Productivity Summary – Goal versus Actual dashboard is displayed. This identifies the employee’s productive goal versus the amount of billable time that has been entered.

On the Productivity Summary there are 4 different ‘categories’ to view the employee’s time – displayed in a ‘speedometer’ type chart and in a standard column style chart.

On the ‘speedometer’ graph, hover the mouse over the needle to display the percentage achieved per category.

- Required Hours vs. Total Hours
  - The ‘Required’ represent the total number of hours that the employee is required to work for the selected timeframe. This is established in Employee Maintenance in the daily hours fields.
  - The ‘Total’ represents the total number of time (hours) that the employee has logged for the selected timeframe.

- Total Hours vs. Direct Hours
  - The ‘Total’ represents the total number of time (hours) that the employee has logged for the selected timeframe.
  - The ‘Direct’ represents the total number of Direct Time (billable) that the employee has logged for the selected timeframe.

- Goal vs. Billable Hours
  - The ‘Goal’ represents the employee’s billable (hours) goal for the timeframe selected.
  - The ‘Billable’ represents the amount of time that the employee has logged, for the timeframe selected that is considered billable.

- Direct Hours vs. Billable Hours
  - The ‘Direct’ represents the total number of Direct Time (billable) that the employee has logged for the selected timeframe.
  - The ‘Billable’ represents the amount of time that the employee has logged, for the selected timeframe that is considered billable.
**Detail**

To view Productivity in detail, click on the ‘Detail’ button on the toolbar. The Productivity Detail dashboard is displayed displaying the different type of employee’s hours in a ‘pie chart’ format.

To better view the breakdown of the pie charts, click on each ‘wedge’ to separate individual pieces of the pie.

- **Agency Hours vs. Direct Hours**
  - Displays the breakdown, by percentage, of how the direct time and non direct time was entered.

- **Direct Hours by Type**
  - Displays a breakdown, by percentage, of how the direct time has been entered, broken into types of Client, Agency and New Business time.

- **Non Direct Hours by Category**
  - Displays a breakdown, by percentage, of the non production that has been entered, broken into each type entered – example: Agency Time, Vacation or Holiday

- **Direct Hours by Client**
  - Displays a breakdown, by percentage, of how the direct time has been entered by client.

**Employee**

To view each individual employee’s productivity for the employee(s) selected in the selection screen, click on the ‘Employee’ button in the toolbar. The employee’s productivity will display in a grid based on the timeframe selected:

- **Employee** – employee name.
- **Required Hours** – total number of hours that the employee is required to work (setup in Advantage | Maintenance | General Setup | Employee).
- **Billable Hours Goal** - employee’s billable (hours) goal (setup in Advantage | Maintenance | General Setup | Employee).
- **Billable Hours** - amount of time that the employee has logged that is considered billable.
- **Non Billable Hours** – amount of time that the employee has logged that is not considered billable.
- **Agency Hours** – amount of time that the employee has logged to an Agency Client. Note: client must be set up as an ‘Agency Client’ for time to be considered Agency Hours.
- **New Business Hours** – time entered against a client marked as ‘New Business’ (Advantage | Maintenance | Client Setup | Client – New Business checkbox)
• **Total Direct Hours** – the total hours of productive time entered by the employee.
• **Non Direct Hours** – the total hours of non-productive time entered by the employee.
• **Total Hours** – the total number of hours that the employee has logged.
• **Variance** – the difference between the (sum of) ‘Billable Hours’ / ‘Non Billable Hours’ / ‘Non Direct Hours’ and the ‘Required Hours’.
• **% Direct** – percentage of direct time entered (Total Direct Hours divided by Total Hours entered).
• **% Non Direct** – percentage of non direct time entered (Non Direct Hours divided by Total Hours entered).
• **% of Billable Hours Goal** – percentage of billable hours entered versus goal (Billable Hours divided by Billable Hours Goal).
• **% of Required Hours** – percentage of required hours entered (Total Hours divided by Required Hours).

**Realization**

The Realization dashboard identifies the employee’s time logged to what has been actually been billed. There are two ways to access Realization information:

1. When first accessing Employee Utilization, after selecting the Office, Department and Employee options on the Productivity filters, click the (Realization) button to display the Realization Summary dashboard. This will display the employee’s billed hours based on the date entered.

2. When first accessing Employee Utilization, immediately click on the ‘Realization’ button (before selecting an employee in filter options on the Productivity view). Select the Office(s) and Department(s) as normal.

   The Employee selection box has an additional selection option on how to display the employee’s time. Select the method to display the billed hours:
   - Display Billed Hours based on Date Entered
   - Display Billed Hours based on Period Billed

   This display option will be defaulted to ‘Display Billed Hours based on the Date Entered’

**Summary**

There are 4 different ‘categories’ of views for the employee’s time, displaying in a ‘speedometer’ type chart and in a standard column style chart.

On the ‘speedometer’ graph, hover the mouse over the needle to display the percentage achieved per category.
• **Direct Hours vs. Billed Hours**
  o The ‘Direct’ represents the total number of Direct Time (billable) that the employee has logged for the selected timeframe.
  o The ‘Billable’ represents the amount of time that the employee has logged, for the selected timeframe that is considered billable.

• **Billable Hours vs. Billed Hours**
  o The ‘Billable’ represents the amount of time that the employee has logged, for the selected timeframe that is considered billable.
  o The ‘Billed’ represents the amount of time that the employee has logged, for the selected timeframe that has been billed.

• **Std Hours Goal vs. Billable Hours**
  o The ‘Standard’ represents the total number of hours that the employee is scheduled to work for the selected timeframe.
  o The ‘Goal’ represents the employee’s billable (hours) goal for the timeframe selected.

• **Goal vs. Billed Hours**
  o The ‘Goal’ represents the employee’s billable (hours) goal for the timeframe selected.
  o The ‘Billed’ represents the amount of time that the employee has logged, for the selected timeframe that has been billed.

**Detail**
To view Realization in detail, click on the ‘Detail’ button on the toolbar. The Realization Detail dashboard is displayed.

**Client Totals (Amounts)**
The Client Totals (Amounts) section details the various dollar amounts associated with the client:

• **Billable** – shows the amount of time that is considered billable, in a dollar format.
• **Billed** – shows the amount that has been billed, in a dollar format.
• **Write Up/Down** – shows the amount that been adjusted after billing.
• **WIP** – shows the outstanding dollar amount for all work in progress.

**Percent Billed by Client**
Displays a breakdown, by percentage, of how much has been billed by client, based on the timeframe selected.

Use the mouse to hover over the graph or pie chart to display amount/percent. Double click on a client ‘piece of the pie’ chart to displays that client’s detail. ‘See Realization by Client section below’
Realization by Client

The Realization by Client section outlines percentage and average hourly rate, per client.

- **Client** – displays the client name.
- **Percent Write Up/Down** – dollar amount of what has been wrote up/down for the client.
- **Average Hourly Rate Billed** – dollar amount of the average rate billed (Billed Amount divided by Billed Hours).
- **Average Hourly Rate Achieved** – dollar amount of the average hourly rate (Billed Amount divided by Direct Hours [Direct Hours from the Realization Summary]).

To view the information broken down by product, click on the ‘Product’ checkbox. To export the employee details, click on the ‘Excel’ icon.

Fee

The Fees button within the Realization dashboard provides a snapshot of fees billed in the selected time frame, and a measurement of fee time that has been posted.

The system determines what to categorize as ‘fee’ based on the settings in the Service Fee Reconciliation program. In Advantage/Accounting/Service Fee Reconciliation, enter criteria on the Fee Criteria page to determine what types of billing are considered service fee in your database. The settings are saved and used in the dashboard later. Time marked as ‘fee’ is automatically tracked against this figure automatically.

To breakdown the client detail by product, click the ‘Products’ checkbox. To export the employee details to Excel, click on the ‘Excel’ icon.

- **Client** – displays the client’s name.
- **Fee** – indicates the fee amount billed.
- **Time** – displays fee time (hours) posted.
- **Variance** – displays the outstanding fee amount

Client

To view client detail, double click on the pie chart to display the Client Detail.

To breakdown the client detail by product, click the ‘Products’ checkbox. To export the client details to Excel, click on the ‘Excel’ icon.

- **Client** – displays the client’s name.
- **Division** – displays the division’s name (must have the ‘Products’ checkbox checked).
- **Product** – displays the product’s name (must have the ‘Products’ checkbox checked).
• **Billable Hours** – amount of time that the employee has logged that is considered billable.
• **Billable Amount** – dollar amount value of the Billable Hours.
• **Non Billable Hours** – amount of time that has been logged to the client that is not considered billable.
• **Non Billable Amount** – dollar amount value of the Non Billable Hours.
• **Total Hours** – the total number of hours that has been logged for the client.
• **Total Amount** – dollar amount value of the Total Hours.
• **Billed Hours** – amount of time that has been logged for the client that has been billed.
• **Billed Amount** – dollar amount value of the Billed Hours.
• **WIP Hours** – amount of time considered ‘work in progress’ for the client.
• **WIP Amount** – dollar amount value of the WIP Hours.
• **Write Up/Down Amount** – dollar amount of what has been wrote up/down for the client.
• **Percent Write Up/Down** – percent of what has been wrote up/down for the client (Write Up/Down Amount divided by Billable Amount).
• **Percent Billed** – percent of the amount billed (Billed Amount divided by Billable Amount).
• **Average Hourly Rate Billed** – dollar amount of the average rate billed (Billed Amount divided by Billed Hours).
• **Average Hourly Rate Achieved** – dollar amount of the average hourly rate (Billed Amount divided by Direct Hours [Direct Hours from the Realization Summary]).

**Employee**

The Employee Detail section details the various dollar amounts associated with the selected employee. To export the employee details to Excel, click on the ‘Excel’ icon.

• **Employee** – displays the employee’s name.
• **Billable Hours Goal** - the employee’s billable (hours) goal for the timeframe selected.
• **Billable Hours** – amount of time that the employee has logged that is considered billable.
• **Billable Amount** – dollar amount value of the Billable Hours.
• **Non Billable Hours** – amount of time that has been logged to the client that is not considered billable.
• **Non Billable Amount** – dollar amount value of the Non Billable Hours.
• **Total Hours** – the total number of hours that has been logged for the client.
• **Total Amount** – dollar amount value of the Total Hours.
• **Billed Hours** – amount of time that has been logged for the client that has been billed.
• **Billed Amount** – dollar amount value of the Billed Hours.
• **WIP Hours** – amount of time considered ‘work in progress’ for the client.
• **WIP Amount** – dollar amount value of the WIP Hours.
• **Write Up/Down Amount** – dollar amount of what has been wrote up/down for the client.
• **Percent Write Up/Down** – percent of what has been wrote up/down for the client (Write Up/Down Amount divided by Billable Amount).
• **Percent Billed** – percent of the amount billed (Billed Hours divided by Billable Hours).
• **Percent Billed of Goal** – percent of hours billed (Billed Hours divided by Billable Hours Goal).
• **Average Hourly Rate Billed** – dollar amount of the average rate billed (Billed Amount divided by Billed Hours).
• **Average Hourly Rate Achieved** – dollar amount of the average hourly rate (Billed Amount divided by Direct Hours [Direct Hours from the Realization Summary]).