

# Team Utilization Suite for Autotask Integration

This app contains dashboards that use data from time entries to calculate the Utilization, Realization, and Billable Utilization of a team. The different widgets included in this suite will help Business Owners and Service Managers reach their target utilization and answer questions such as:

- Are your team members recording their time entries correctly?
- Is your team working on too many internal or non-billable tickets?
- Is your team's workload managed effectively?

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## 1. List of Dashboards and Descriptions

Dashboard Name	Description
Team Utilization - Summary	This dashboard shows key team metrics and highlights the Utilization, Realization, and Billable Utilization for the selected date range. It also has column charts that show the monthly trend for these metrics over the last 12 months.
Team Utilization - Comparison	This dashboard contains a table that shows a breakdown of KPIs on a per-technician level to allow managers to review the performance of specific teams or individuals. It also has graphs that show the top technicians/teams based on utilized and realized hours.
Team Utilization - Compare Periods	This dashboard has two similar tables showing the breakdown of KPIs on a per-technician level to allow the comparison of an individual's utilization with other members or across different periods.
Team Utilization - Compare Teams	This dashboard has two similar tables showing the breakdown of KPIs on a per-team level to allow the comparison of a team's utilization across different periods or against other teams.
Team Utilization - Work Category	This dashboard shows recorded hours for each Work Category and Business Unit on a per-team or technician level.
Team Utilization - Non-Billable Time	This dashboard gives a complete breakdown of time entries tagged as Do Not Bill or No Charge on a per-team and technician level. It also shows the proportion of non-billable time recorded against customer and internal teams.
Team Utilization - Daily Time Span	This dashboard shows a comparison between the computed Total Daily Span (hours spent by a technician) and Total Labor Hours (hours logged for work by a technician).
Team Utilization - Daily Chart	This dashboard shows the daily average and trend for the KPIs Utilization, Realization, Billable Utilization, Do Not Bill, and No Charge.
Team Utilization - Weekly Chart	This dashboard shows the weekly average and trend for the KPIs Utilization, Realization, Billable Utilization, Do Not Bill, and No Charge.
Team Utilization - Non-Business Hours	This dashboard gives a breakdown of Time Entries under Non-Business Hours on a per-technician and date entry level.
(SETTINGS) Autotask Settings for App Packages	<p>This contains settings for dashboards under the Financial and Team Utilization suites for Autotask Integration.</p> <p>For Team Utilization, users can select which among their companies should be tagged as internal and also assign teams to technicians.</p>

## 2. Terms and Calculations

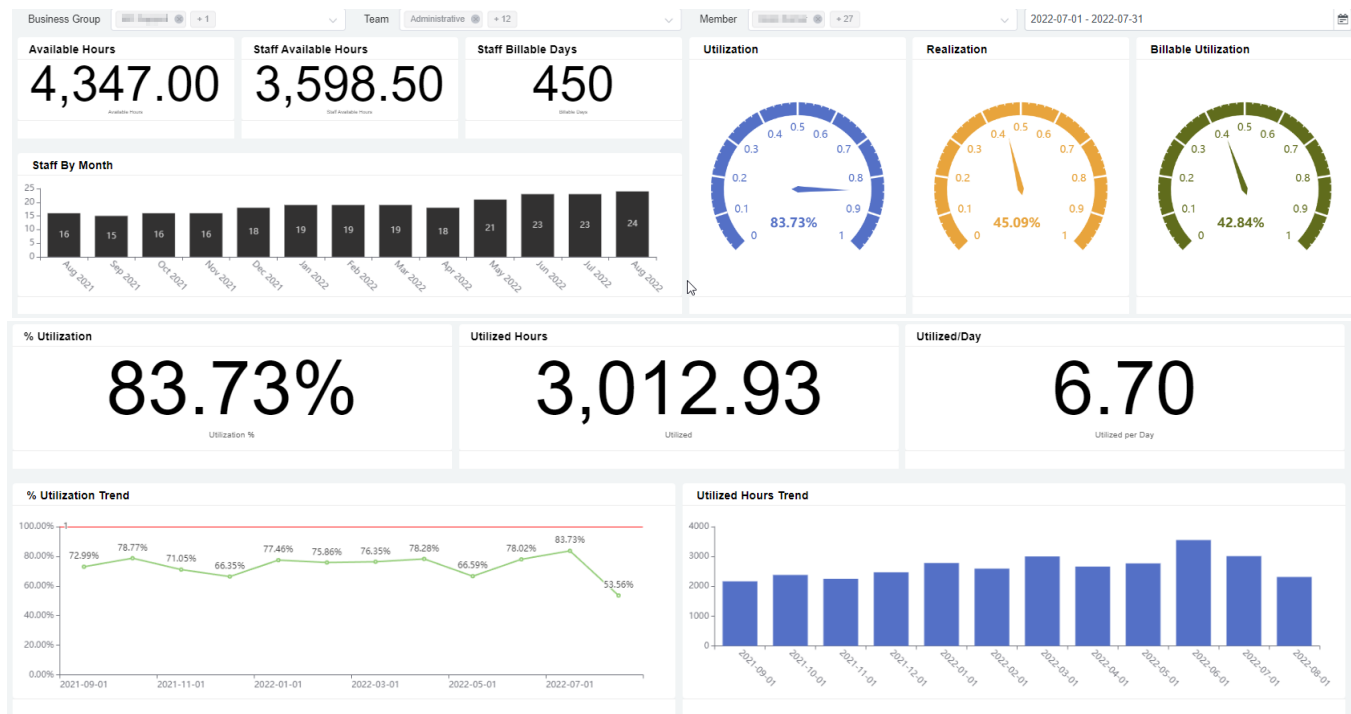
Term	Definition/Calculation
Available Hours	Daily capacity recorded per member multiplied by the number of weekdays for the selected date range
Staff Available Hours	Available Hours less PTO hours

Staff Billable Days	Staff Available Hours divided by 8 hours. This is used to compute for utilized/day, realized/day, and billable utilized/day.Utilized Hours
Utilized Hours	Actual hours worked based on time entries excluding PTO hours
Utilization %	Utilized Hours / Staff Available Hours
Realized Hours	Utilized Hours excluding time entries against internal companies
Realization %	Realized / Staff Available Hours
Billable Utilized Hours	All time entries that are considered Realized and are Billable
Billable Utilization %	Billable hours / Staff Available Hours
PTO	Total hours of recorded Paid Time Off such as Holiday, Lunch, Vacation, and Personal
Invoiceable	Time entries that are Billable but not against an agreement
No Charge	Total hours of time entries tagged as No Charge
Do Not Bill	Total hours of time entries tagged as Do Not Bill
Business Hours	Labor / Actual hours spent working within business hours
Non-Business Hours	Labor / Actual hours spent working outside of business hours
Daily Span	Latest time entry End Time less the earliest time entry Start Time of each member for each day
Labor Hours	Total actual hours worked based on time entries

### 3. Team Utilization - Summary Dashboard

The Summary dashboard shows key team metrics and highlights the Utilization, Realization, and Billable Utilization for the selected date range. It also has column charts that show the monthly trend for these metrics over the last 12 months.

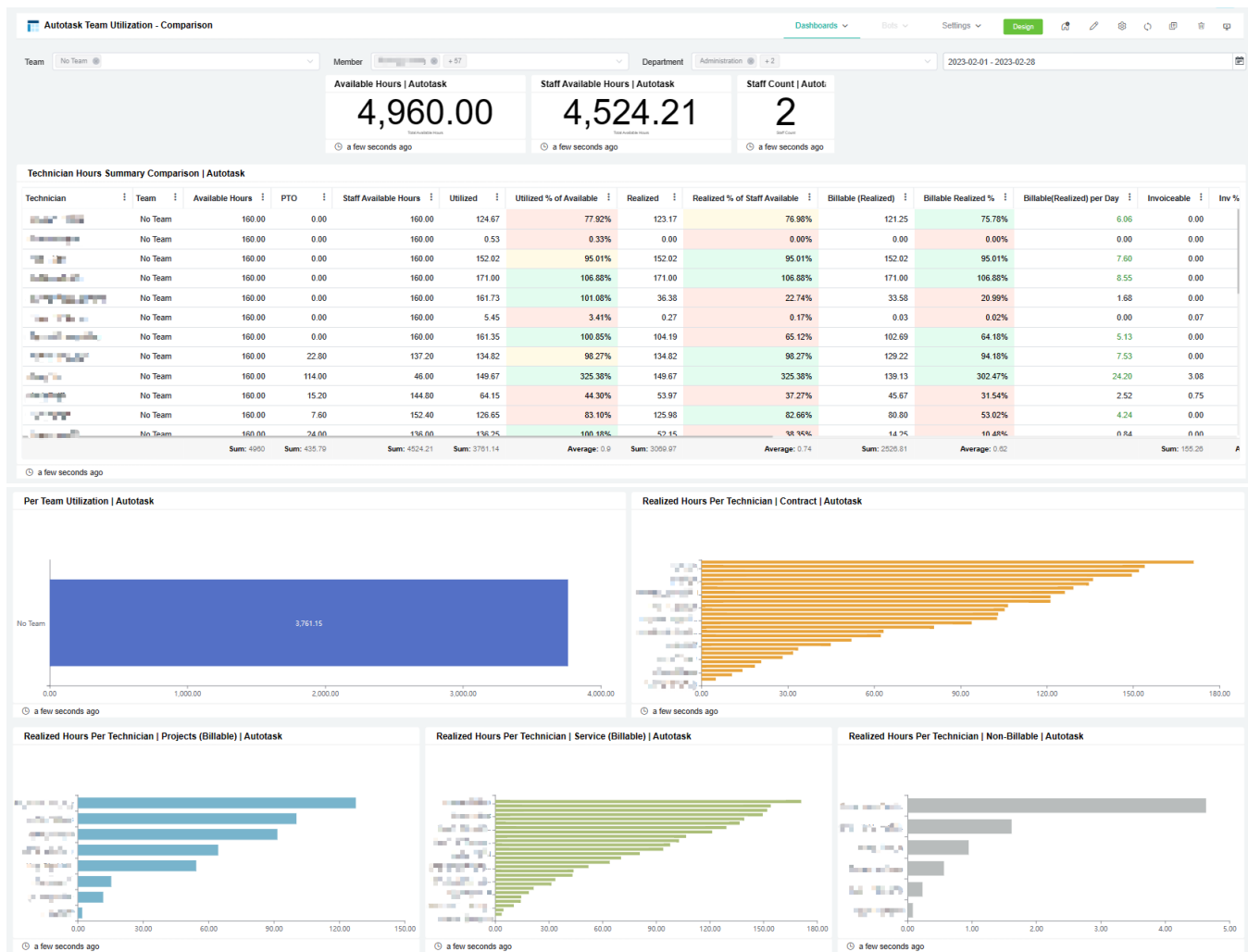
The available slicers are Business Group, Team, Technician, and Date Range slicers.



### 4. Team Utilization - Comparison Dashboard

This dashboard contains a table that shows a breakdown of KPIs on a per-technician level to allow managers to review the performance of specific teams /individuals. It also has graphs showing the top technicians/teams in terms of utilized and realized hours.

The available slicers are Business Group, Team, Technician, and Date Range slicers.



5. Team Utilization - Compare Periods Dashboard

This dashboard has two similar tables showing the breakdown of KPIs on a per-technician level to allow users to compare an individual's utilization across different periods or against other members.

The available slicers are Business Unit, Team, Technician, and Date Range slicers.

Autotask Team Utilization - Compare Periods

Department

Administration

+2

Team

No Team

Member

100%














100%

+87

Pre Period

2023-02-01 - 2023-02-28

Technician Hours Summary | Pre-Period | Autotask













Technician	Team	Available Hours	PTO	Staff Available Hours	Utilized	Utilized % of Available	Realized	Realized % of Staff Available	Billable (Realized)	Billable Realized %	Billable(Realized) per Day	Invoiceable	Inv % of Total	Do Not Bill	Business H
	No Team	100.00	0.00	100.00	101.73	101.08%	30.38	22.74%	33.58	20.99%	1.68	0.00	0.00%	2.80	
	No Team	100.00	0.00	100.00	5.46	3.41%	0.27	0.17%	0.03	0.02%	0.00	0.07	0.04%	5.42	
	No Team	100.00	0.00	100.00	101.35	100.85%	104.19	85.12%	102.69	64.18%	5.13	0.00	0.00%	1.50	
	No Team	100.00	22.80	137.20	134.82	68.27%	134.82	68.27%	129.22	94.18%	7.53	0.00	0.00%	5.81	
	No Team	100.00	114.00	48.00	149.07	325.38%	149.07	325.38%	139.13	302.47%	24.20	3.08	6.70%	10.54	
	No Team	100.00	15.20	144.80	64.15	44.30%	63.97	37.27%	45.87	31.54%	2.52	0.75	0.52%	8.30	
	No Team	100.00	7.80	102.40	126.85	83.10%	126.85	82.96%	80.80	53.02%	4.24	0.00	0.00%	45.18	
	No Team	100.00	24.00	138.00	136.25	100.18%	52.15	38.35%	14.25	10.43%	0.84	0.00	0.00%	38.60	
	No Team	100.00	15.20	144.80	147.24	101.68%	147.24	101.68%	138.00	94.34%	7.55	2.00	1.38%	10.94	
	No Team	100.00	0.00	100.00	155.55	98.00%	155.55	99.00%	154.00	90.25%	7.70	0.00	0.00%	4.55	
	No Team	100.00	0.00	100.00	118.10	73.81%	118.10	73.81%	18.77	11.73%	0.94	0.22	0.14%	90.33	
	No Team	100.00	19.80	140.20	137.17	97.84%	130.70	93.20%	109.30	77.90%	6.24	45.98	33.91%	21.49	
	No Team	100.00	0.00	100.00	95.35	65.40%	30.64	65.40%	58.67	73.00%	1.92	0.00	0.11%	87.17	
Sum: 4090		Sum: 435.70		Sum: 4524.21	Sum: 3701.14	Average: 0.9	Sum: 3095.97	Average: 0.74	Sum: 2528.91	Average: 0.92		Sum: 155.29	Average: 0.03	Sum: 550.45	Sum

a few seconds ago

Post Period

2023-03-01 - 2023-03-30

Technician Hours Summary | Post-Period | Autotask

Technician	Team	Available Hours	PTO	Staff Available Hours	Utilized	Utilized % of Available	Realized	Realized % of Staff Available	Billable (Realized)	Billable Realized %	Billable(Realized) per Day	Invoiceable	Inv % of Total	Do Not Bill	Business H
	No Team	104.00	6.10	87.90	51.52	52.82%	51.52	52.82%	50.27	51.34%	4.11	0.00	0.00%	1.25	
	No Team	104.00	0.00	104.00	87.07	84.40%	36.82	34.84%	29.17	24.20%	1.94	0.00	0.00%	10.75	
	No Team	104.00	0.00	104.00	114.00	109.62%	114.00	109.62%	114.00	109.62%	8.77	0.00	0.00%	0.00	
	No Team	104.00	0.00	104.00	144.75	139.18%	144.75	139.18%	144.75	139.18%	11.13	1.00	0.98%	0.00	
	No Team	104.00	0.00	104.00	105.88	101.81%	19.15	18.41%	18.50	17.79%	1.42	0.00	0.00%	0.85	
	No Team	104.00	0.00	104.00	1.88	1.82%	0.13	0.13%	0.00	0.00%	0.00	0.00	0.00%	1.88	
	No Team	104.00	0.00	104.00	105.23	101.19%	85.77	83.24%	85.77	83.24%	5.05	0.00	0.00%	0.00	
	No Team	104.00	15.20	88.80	91.70	103.27%	91.70	103.27%	87.19	88.14%	7.85	4.40	4.89%	4.55	
	No Team	104.00	0.00	104.00	102.98	99.02%	102.23	98.30%	74.87	71.99%	5.76	0.42	0.40%	27.38	
	No Team	104.00	15.20	88.80	79.55	89.21%	55.95	64.13%	51.45	57.84%	4.64	0.00	0.00%	5.50	
	No Team	104.00	0.00	104.00	107.72	103.57%	107.70	103.59%	29.80	28.89%	2.29	0.00	0.00%	77.90	
	No Team	104.00	0.00	104.00	104.40	100.38%	32.90	31.63%	13.98	13.45%	1.08	0.00	0.00%	19.03	

## 6. Team Utilization - Compare Teams Dashboard

This dashboard has two similar tables showing the breakdown of KPIs on a per-team level to allow users to compare a team's utilization across different periods or against other teams.

The available slicers are Business Unit, Team, Technician, and Date Range slicers.

Pre Period

2022-07-01 - 2022-07-31

Technician Hours Summary per Technician Pre Period

Team	Available Hours	Staff Available Hours	Utilized	Utilized % of Available	Realized	Realized % of Staff Available	Billable (Realized)	Billable Realized %	Invoiceable	Inv % of Total
Administrative	45.00	45.00	0.14	0.31%	0.14	0.31%	0.00	0.00%	0.00	0.00%
Centralized Services	162.00	138.00	136.98	99.26%	65.10	47.17%	62.98	45.64%	39.24	28.43%
Support	486.00	430.92	269.52	62.55%	75.64	17.55%	69.67	16.17%	1.00	0.23%
Professional Services	306.00	282.00	152.19	53.97%	46.94	16.65%	46.94	16.65%	12.20	4.33%
Reactive Intern	306.00	306.00	259.76	84.89%	40.36	13.19%	40.36	13.19%	9.17	3.00%
Reactive Support I	1,440.00	1,207.96	1,107.72	91.70%	930.55	77.03%	876.36	0.00%	65.13	0.00%
Reactive Support II	360.00	214.03	192.21	89.81%	161.98	75.68%	154.05	71.98%	32.40	15.14%
Service Manager	171.00	150.00	145.38	96.92%	14.44	9.63%	14.11	9.41%	0.10	0.07%
Technical Alignment	171.00	155.82	150.07	96.31%	93.46	59.98%	87.99	56.47%	25.88	16.61%
Technical Intern	117.00	105.00	103.52	98.59%	19.37	18.45%	19.37	18.45%	0.00	0.00%
Sum:	3879	3319.90	2816.35	Average: 0.82	1519.27	Average: 0.32	1441.15	Average: 0.25	218.94	Average: 0.08

Post Period

2022-08-01 - 2022-08-31

Technician Hours Summary per Technician Post Period

Team	Available Hours	Staff Available Hours	Utilized	Utilized % of Available	Realized	Realized % of Staff Available	Billable (Realized)	Billable Realized %	Invoiceable	Inv % of Total
Administrative	63.00	63.00	0.78	1.24%	0.78	1.24%	0.08	0.13%	0.00	0.00%
Centralized Services	189.00	153.00	164.67	107.63%	80.60	52.68%	80.21	52.42%	59.17	38.67%
Support	567.00	512.52	370.09	72.21%	62.24	12.14%	59.89	11.69%	2.00	0.39%
Professional Services	378.00	343.00	216.77	63.20%	79.59	23.20%	79.59	23.20%	5.25	1.53%
Reactive Intern	378.00	368.83	193.73	52.53%	12.21	3.31%	12.21	3.31%	0.07	0.02%
Reactive Support I	1,512.00	1,192.20	1,194.11	100.16%	1,000.65	83.93%	944.62	0.00%	17.94	0.00%
Reactive Support II	378.00	298.08	315.61	105.88%	262.73	88.14%	248.64	83.41%	55.45	18.60%
Service Manager	189.00	120.00	120.23	100.19%	13.70	11.42%	13.44	11.20%	0.00	0.00%
Technical Alignment	189.00	106.25	112.09	105.50%	56.34	53.03%	51.47	48.44%	23.29	21.92%
vCIO	189.00	155.62	163.59	105.12%	37.31	23.98%	36.89	23.71%	11.99	7.70%
Sum:	4221	3472.5	3012.93	Average: 0.83	1622.56	Average: 0.33	1541.45	Average: 0.24	175.16	Average: 0.08

## 7. Team Utilization - Work Category Dashboard

This dashboard shows recorded hours for each Work Category and Business Unit on a per-team or technician level.

The available slicers are Business Group, Team, Technician, and Date Range slicers.

Work Category Hours | Per Technician

Sum of Hours

Sum of % of Total

Avg of % of Row Total

Drop filter here

Work Category

Technician	Activity	ChargeCode				
	Hours	% of Total	% of Row T...	Hours	% of Total	% of Row T...
Alwin				28.00	0.69%	53.33%
Bradley				49.25	1.22%	24.11%
Carl				95.83	2.37%	45.96%
Celine				109.49	2.70%	56.53%
Connor				87.75	2.17%	44.19%
Darlin						
Domenic				73.93	1.82%	37.18%
George				44.47	1.10%	22.36%
John						
Josh				30.47	0.75%	15.52%
Kevin				44.86	1.11%	23.20%
Kevin	3.40	0.08%	1.64%	29.79	0.74%	14.39%

Business Unit Hours | Per Technician

Sum of Hours

Sum of % of Total

Avg of % of Row Total

Drop filter here

Business Unit

Technician	MC Support	(Empty)				
	Hours	% of Total	% of Row T...	Hours	% of Total	% of Row T...
Alwin	52.50	1.30%	100.00%			
Bradley	204.31	5.04%	100.00%			
Carl	208.49	5.15%	100.00%			
Celine	193.70	4.78%	100.00%			
Connor				198.58	4.90%	100.00%
Darlin				197.73	4.88%	100.00%
Domenic	198.83	4.91%	100.00%			
George	198.90	4.91%	100.00%			
John	14.50	0.36%	100.00%			
Josh	196.38	4.85%	100.00%			
Kevin	193.33	4.77%	100.00%			
Kevin	207.09	5.11%	100.00%			

The available slicers are Business Group, Team, Technician, and Date Range slicers.

Business Group

MC Support

+ 1

Team

Administrative

+ 12

Member

6

+ 28

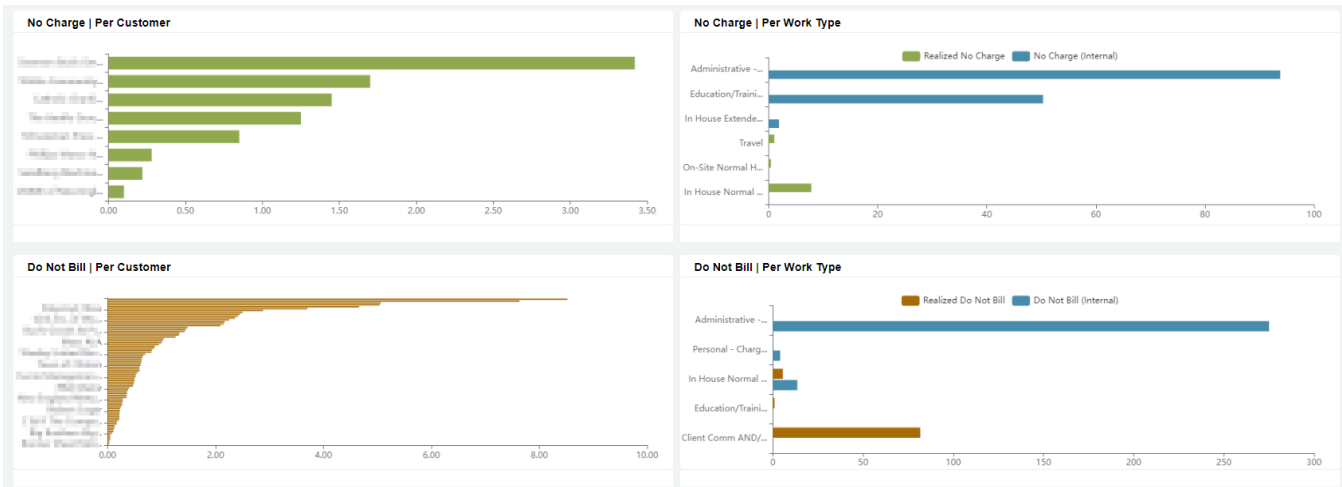
2022-07-26 - 2022-08-25

Non-Billable Time Overview

No Charge	No Charge (Customer)	% of No Charge (Customer)	Do Not Bill	Do Not Bill (Customer)	% of Do Not Bill (Customer)
155.30	9.27	5.97%	380.60	88.04	23.13%

Non-Billable Time | Per Technician Summary

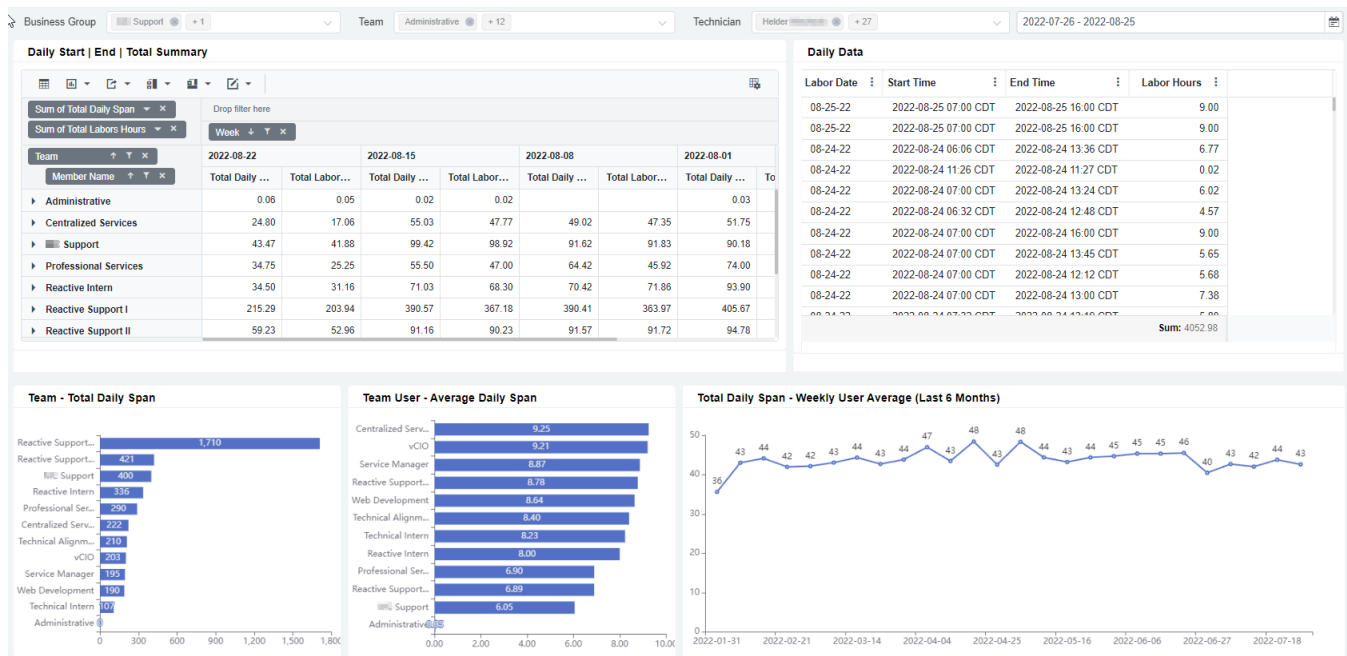
Technician	Team	Do Not Bill	Do Not Bill	% of Do Not Bill	Do Not Bill	% of Do Not Bill	No Charge	No Charge	% of No Charge	No Charge	% of No Charge
		(Customer)	(Customer)	(Customer)	(Internal)	(Internal)	(Customer)	(Internal)	(Customer)	(Internal)	(Internal)
	Reactive Support I	52.94	25.80	48.73%	27.14	51.27%	0.65	0.00	0.00%	0.65	100.00%
	Technical Alignment	45.85	1.05	2.29%	44.80	97.71%	14.95	4.67	31.24%	10.28	68.76%
	Reactive Support I	44.96	24.56	54.63%	20.40	45.37%	0.00	0.00	0.00%	0.00	0.00%
	Reactive Support I	33.53	0.70	2.09%	32.83	97.91%	0.85	0.85	100.00%	0.00	0.00%
	Reactive Support I	31.06	11.76	37.86%	19.30	62.14%	12.86	1.83	14.23%	11.03	85.77%
	Support	21.85	8.25	37.76%	13.60	62.24%	74.61	0.00	0.00%	74.61	100.00%
	Centralized Services	21.04	1.83	8.70%	19.21	91.30%	42.71	0.00	0.00%	42.71	100.00%
	Reactive Support II	20.81	10.29	49.45%	10.52	50.55%	1.43	0.00	0.00%	1.43	100.00%
	Reactive Support I	16.94	1.63	9.62%	15.31	90.38%	0.00	0.00	0.00%	0.00	0.00%
Sum:		380.60	Sum: 88.04		Sum: 275.06		Sum: 155.30	Sum: 9.27		Sum: 146.03	



## 9. Team Utilization - Daily Time Span Dashboard

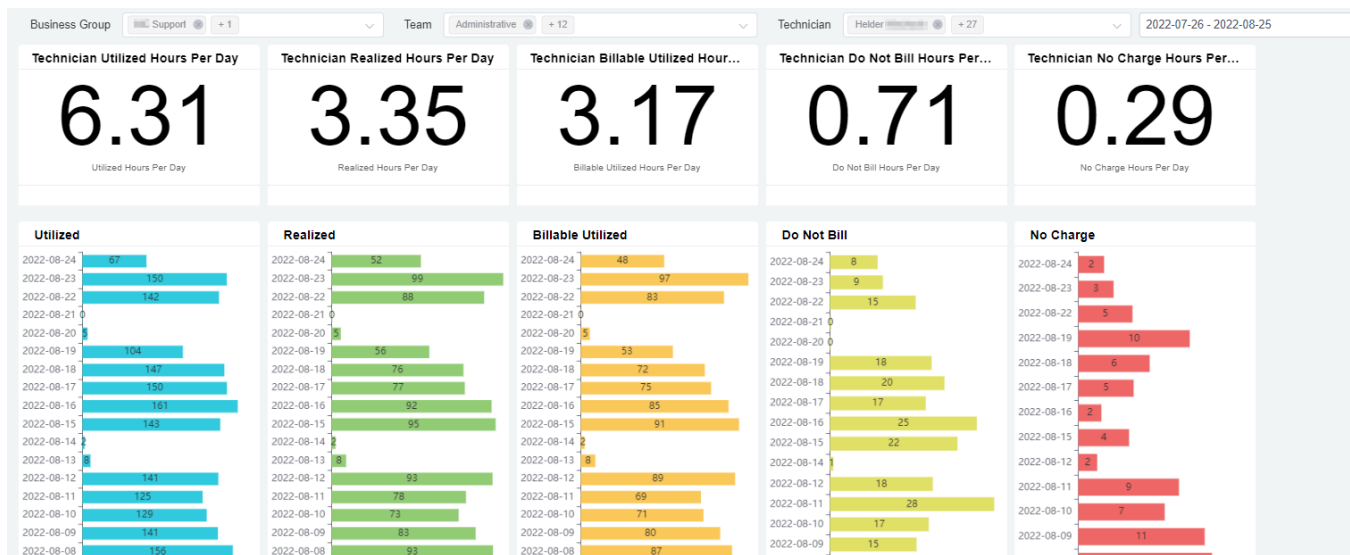
This dashboard shows a comparison between the computed Total Daily Span (hours spent by a technician) and Total Labor Hours (hours logged for work by a technician).

The available slicers are Team, Technician, and Date Range slicers.



## 10. Team Utilization - Daily Chart Dashboard

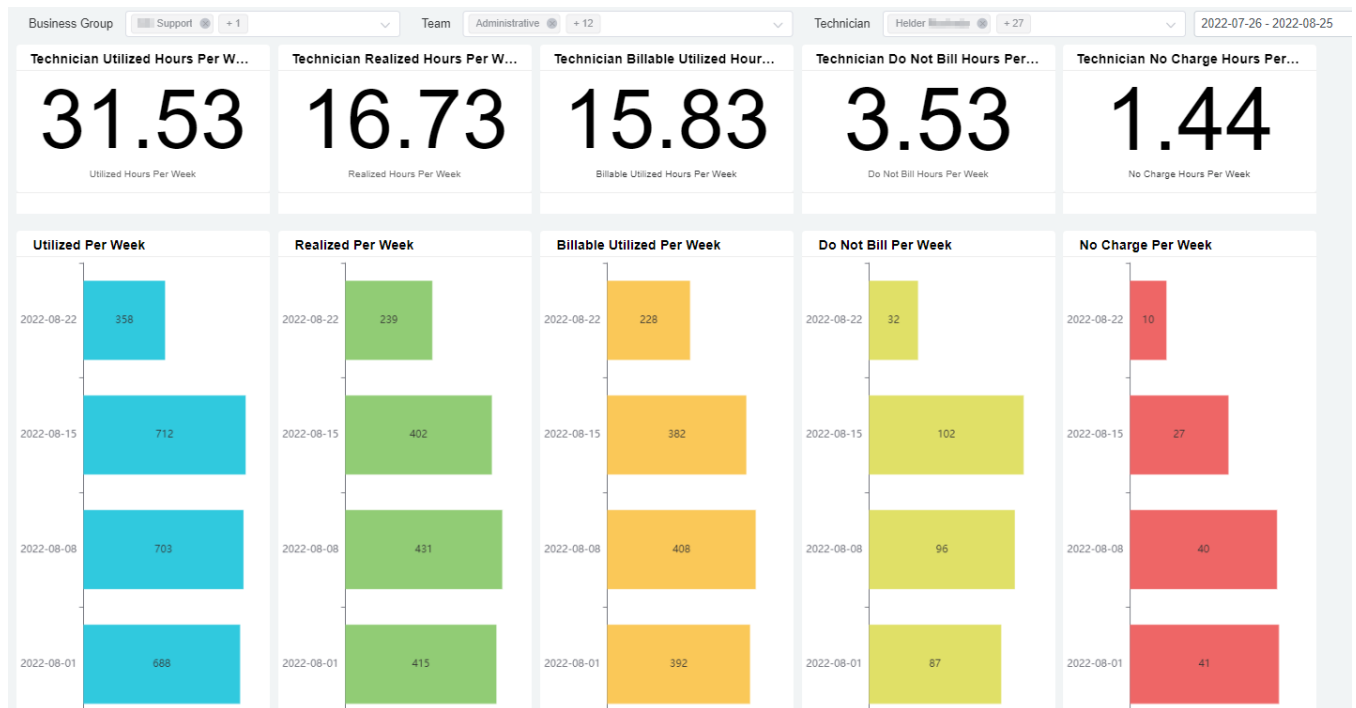
This dashboard shows the daily average and trend for the KPIs Utilization, Realization, Billable Utilization, Do Not Bill, and No Charge. The available slicers are Business Unit, Team, Technician, and Date Range slicers.



## 11. Team Utilization - Weekly Chart Dashboard

This dashboard shows the weekly average and trend for the KPIs Utilization, Realization, Billable Utilization, Do Not Bill, and No Charge.

The available slicers are Business Unit, Team, Technician, and Date Range slicers.



## 12. Team Utilization - Non-Business Hours Dashboard

This dashboard gives a breakdown of Time Entries under Non-Business Hours on a per-technician and date entry level.

The available slicers are the Business Unit, Team, Technician, and Date Range slicers.

Business Group		Support + 1		Team		Administrative + 12		Technician		Holder + 27		2022-07-26 - 2022-08-25		🗨️													
Technician Hours Summary (Non-Business Hours)														Time Entry Details (Non-Business Hours)													
Team		Technician		Non-Business Hours																							
Centralized Services		Max Kaplan		25.06																							
Reactive Support I		Tom Rodier		20.41																							
Reactive Support I		Bradley Card		18.37																							
Reactive Support I		Sean Picotte		18.06																							
Reactive Intern		Darlin Rodriguez		17.73																							
Professional Services		Rolando Salamea-Lopez		11.83																							
vCIO		Kevin Rookey		11.62																							
Reactive Support I		Carl Welch		10.96																							
MC Support		Celine Vaz		7.35																							
Reactive Support I		George Hidalgo		6.64																							
Technical Alignment		Domenic Gemma		6.58																							
Reactive Support I		Nickolas Maxwell		4.39																							
Reactive Support II		Connor Ingram		4.03																							
Reactive Support II		Luis Munoz		3.45																							
Reactive Support I		Kevin Portillo		2.55																							
Reactive Intern		Michael Machado		2.40																							
Technical Intern		Lee Perreault		0.63																							
Reactive Support I		Thomas Faulhaber		0.54																							
MC Support		Robin Guilbault		0.50																							
Web Development		Tien Le		0.19																							
Service Manager		Josh Randall		0.03																							
				Sum: 173.32																							

### 13. Settings for App Packages

- **Internal Company Selection:** Allows users to select which among their companies should be tagged as internal. These will not be included in the computation of Realized Hours.
- **Autotask Team Name Formlist:** If the user does not want to utilize the Autotask mapping for Job Title, the user can list down all technicians and assign a team to each one.

Autotask Settings for App Packages
Dashboards
Bots
Settings
Design

Contracts Financial Suite Setti...
Contract Target Hours
Target Margin 0.90
Clear Submit

Team Utilization Setting | Autot...
Internal Company Selection
Internal Company Select a company
Team Name for Utilization Suite
# Team Name Resources
No Data
Add
Reminder
Kindly make sure that there is only one (1) team per member.
Clear Submit

#### 13.1. Related Topics

- [Team Utilization Suite for ConnectWise Manage Integration](#)