Team Utilization Suite for ConnectWise Manage 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 or 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) Team Utilization Suites Settings for App Package	This contains settings for dashboards under the Team Utilization suites for ConnectWise Manage Integration. For Team Utilization, users can select which among their companies should be tagged as internal and also assign teams to technicians.

2. Terms and Calculations

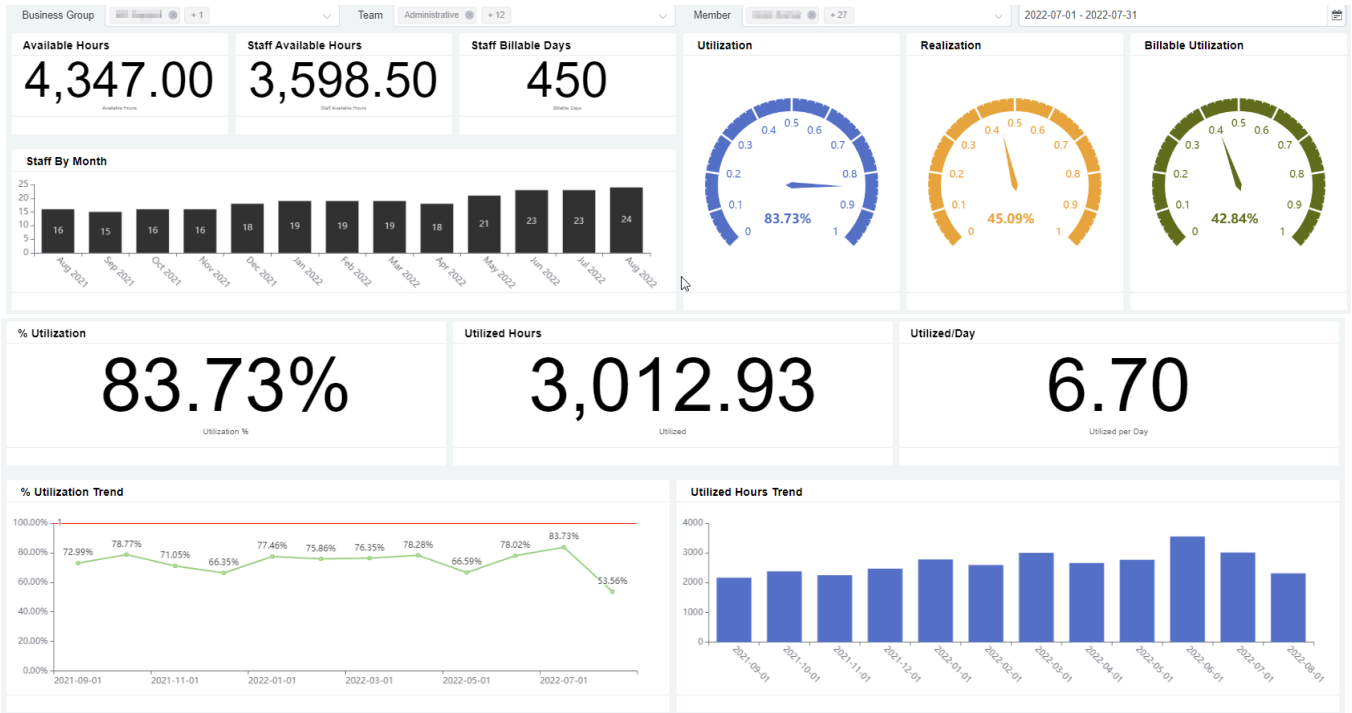
Term	Definition/Calculation
Available Hours	Daily capacity recorded per member multiplied by the number of weekdays for the selected date range
Staff Available Hours	Available Hours less PTO hours

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	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.

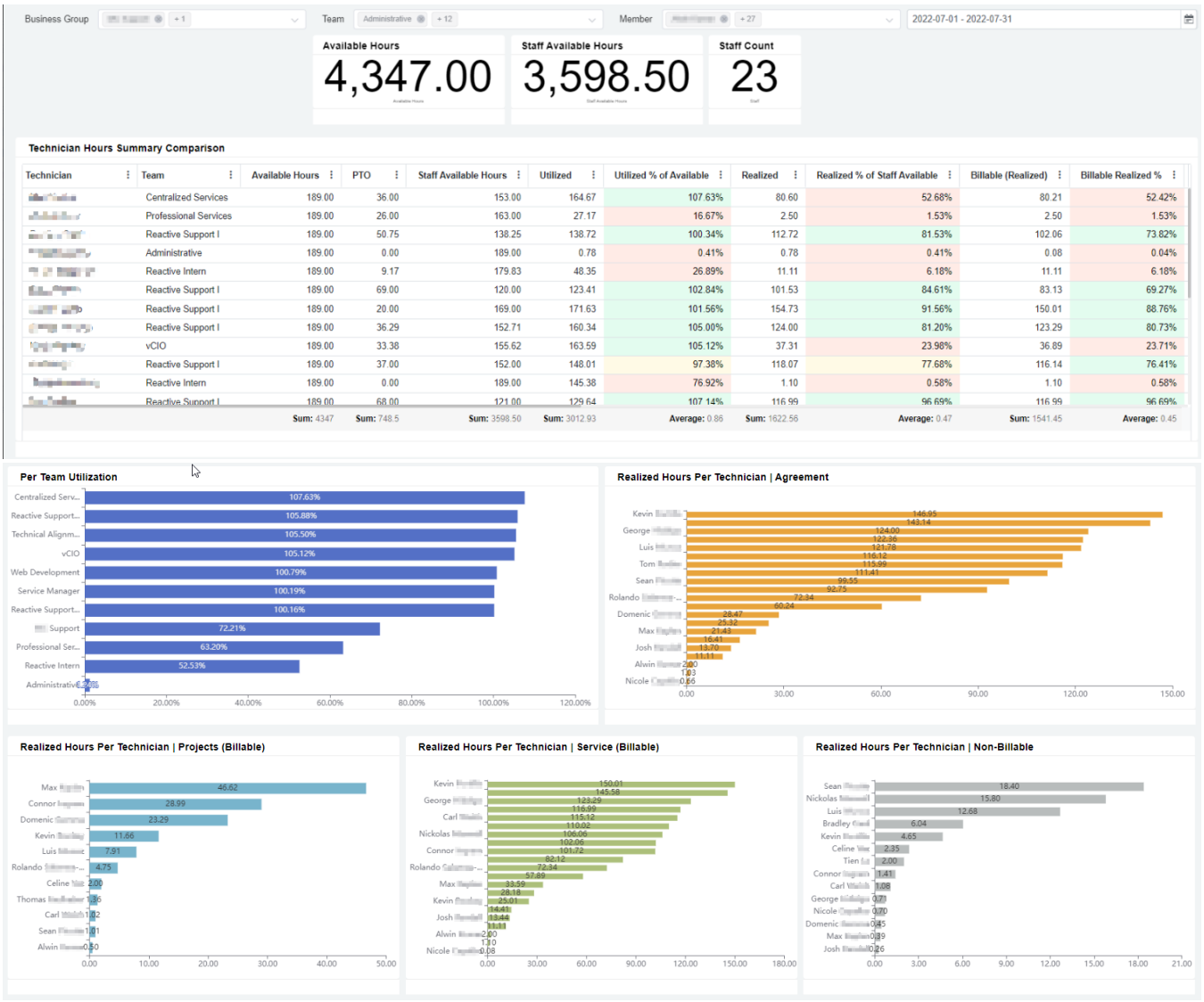
The available slicers are Business Group, Team, Technician, and Date Range slicers.



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 or individuals. It also has graphs showing the top technicians or teams in terms of utilized and realized hours.

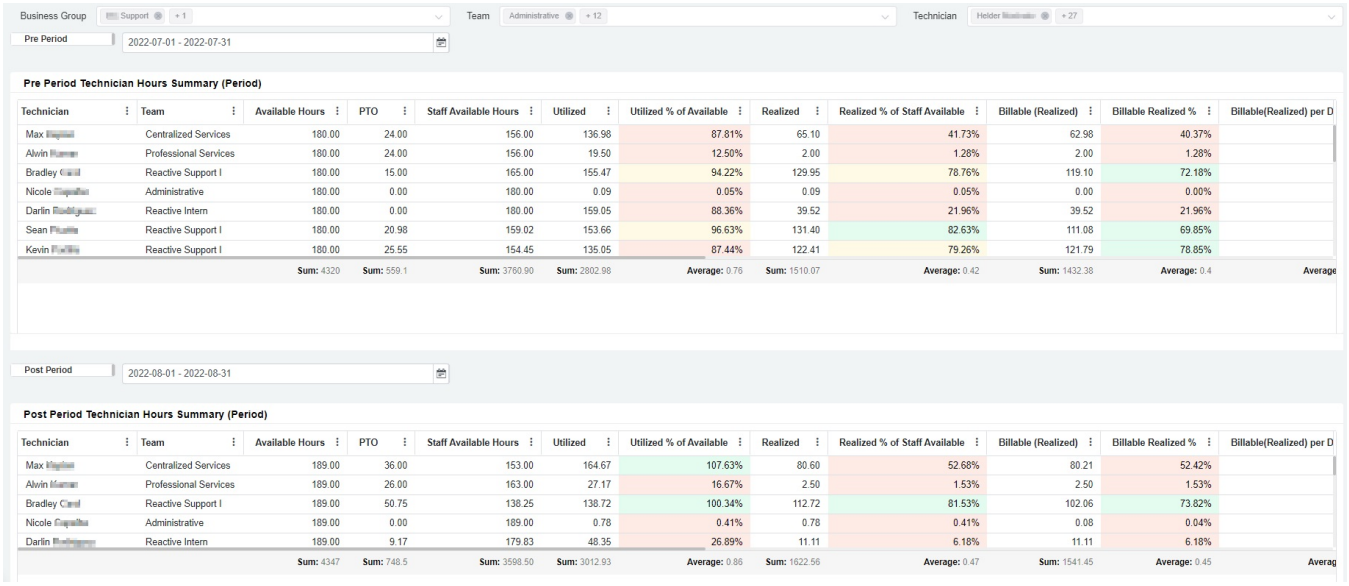
The available slicers are Business Group, Team, Technician, and Date Range slicers.



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.

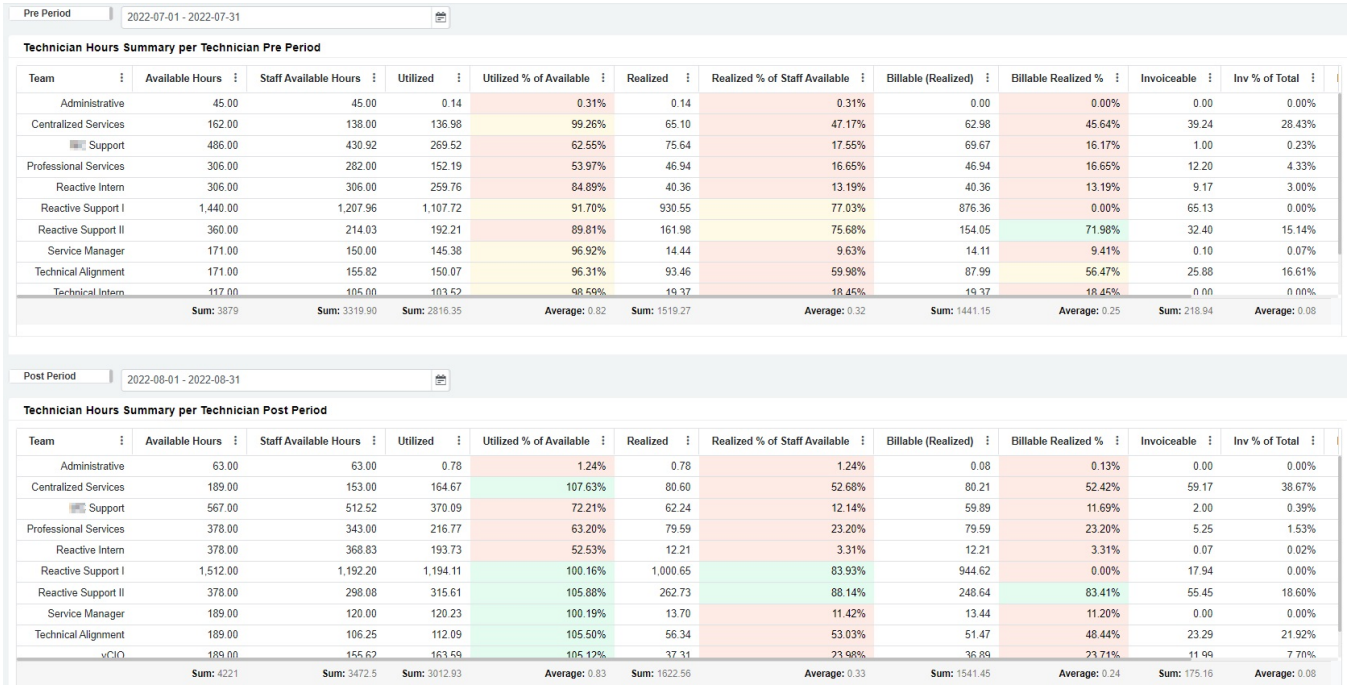
The available slicers are Business Unit, Team, Technician, and Date Range slicers.



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.

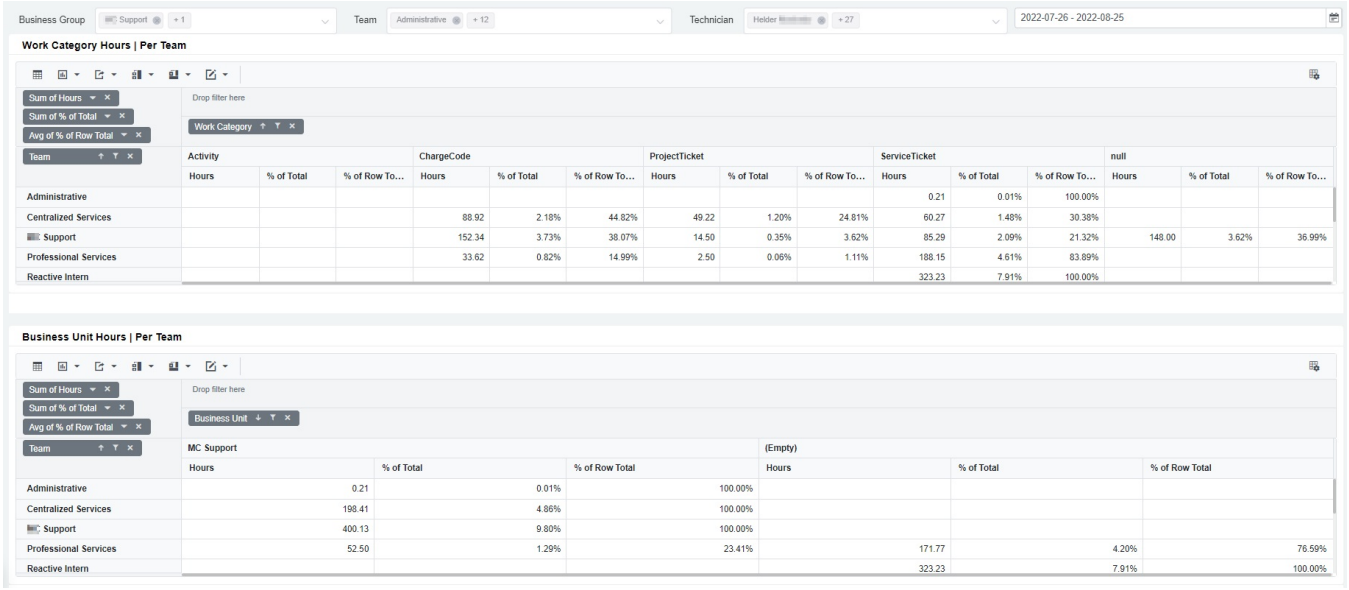
The available slicers are Business Unit, Team, Technician, and Date Range slicers.

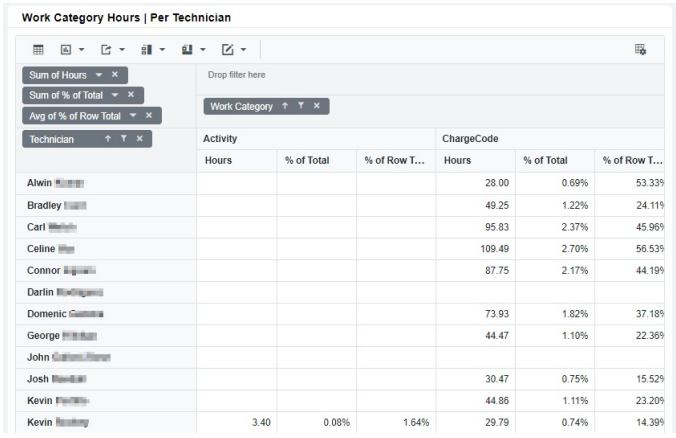


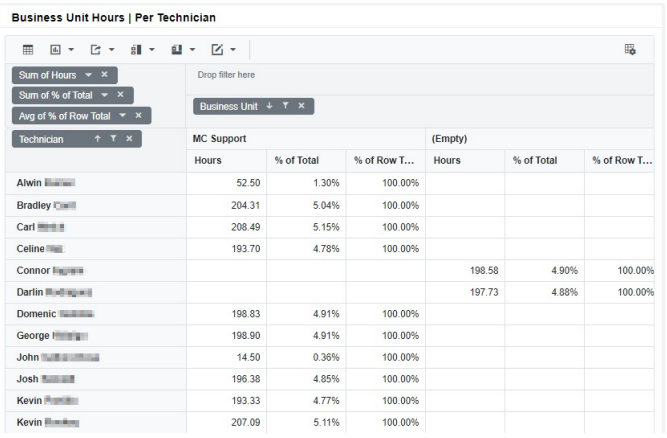
7. Team Utilization - Work Category Dashboard

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.



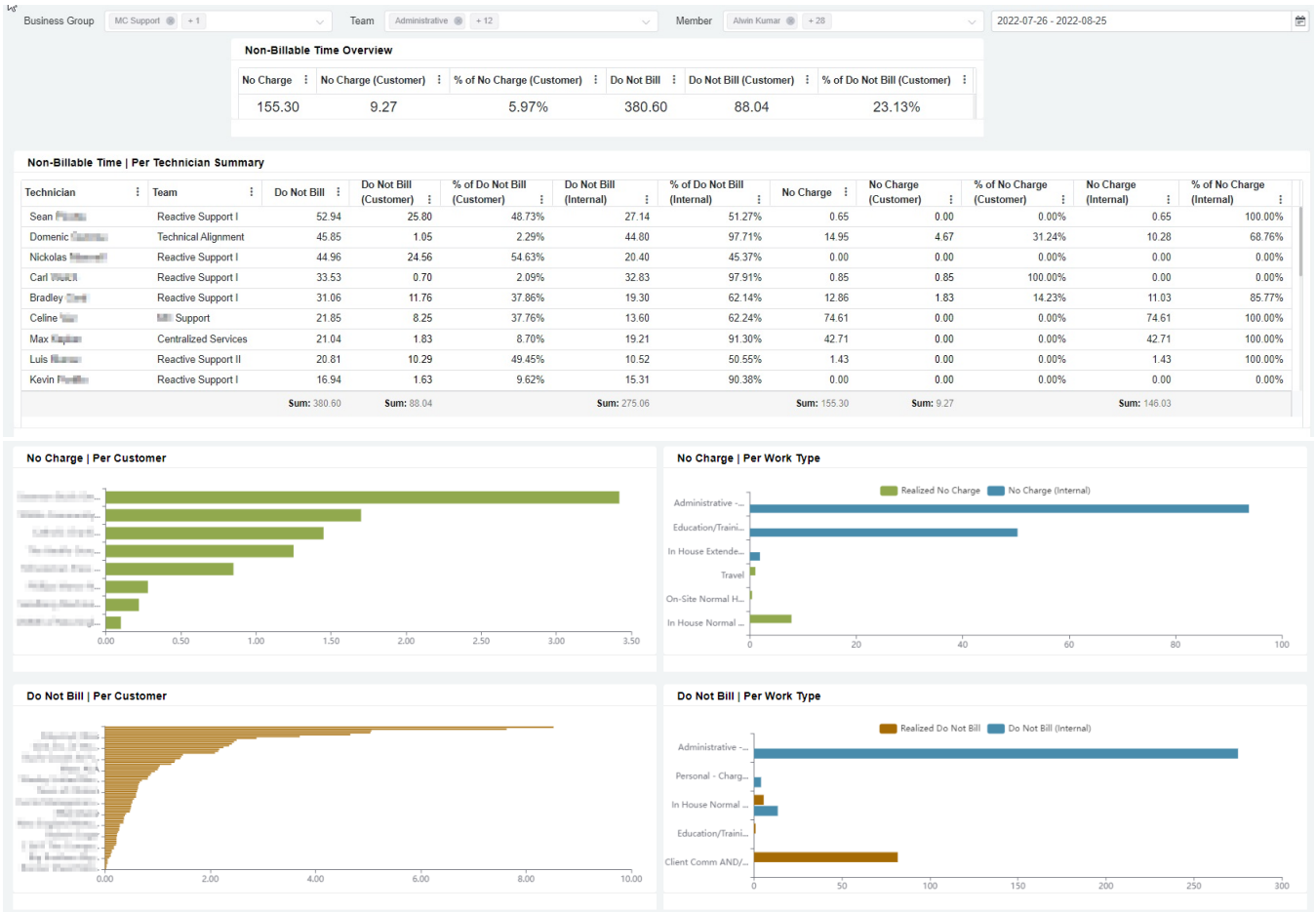




8. Team Utilization - Non-Billable Time Dashboard

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.

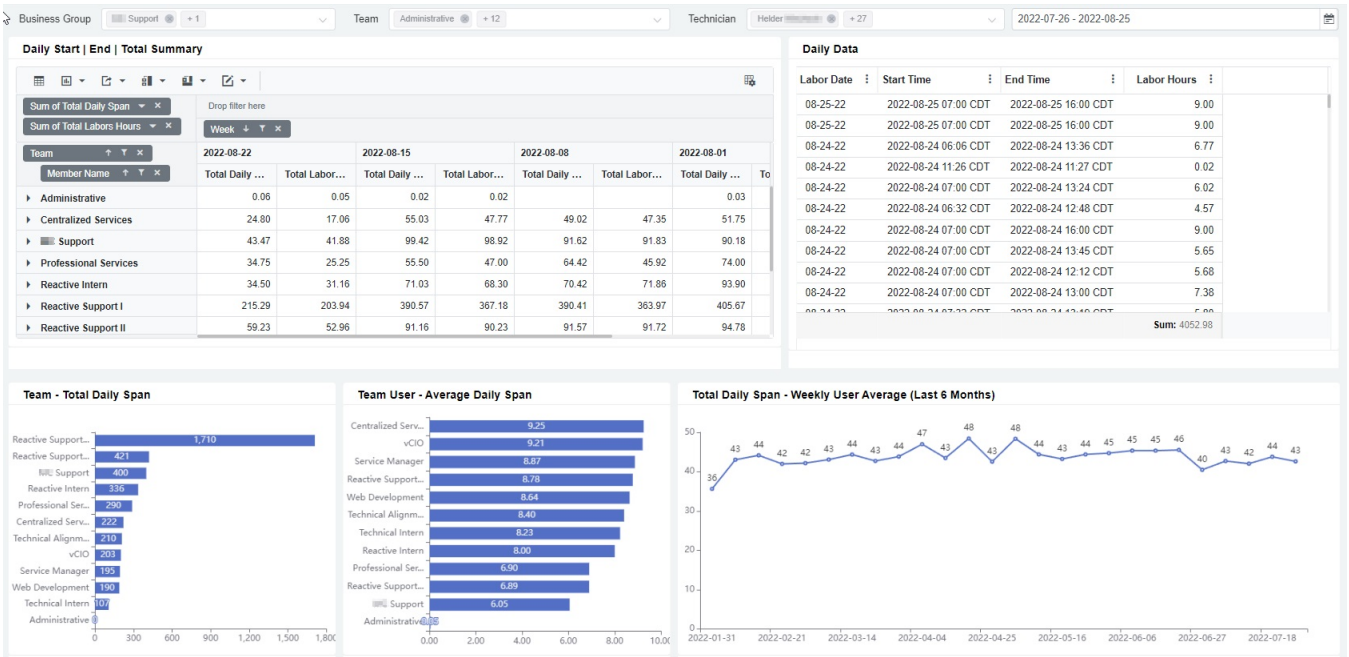
The available slicers are Business Group, Team, Technician, and Date Range slicers.



9. Team Utilization - Daily Time Span Dashboard

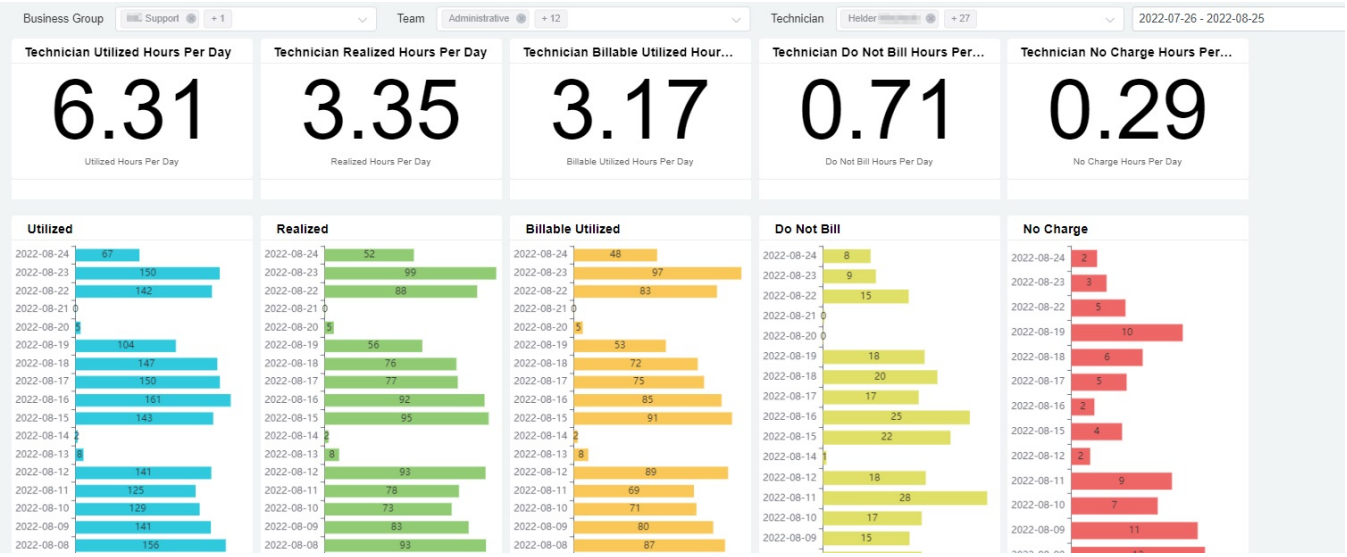
This dashboard shows a comparison between the computed Total Daily Span (hours spent by a technician) and Total Labor Hours (hours logged for work by a technician).

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.

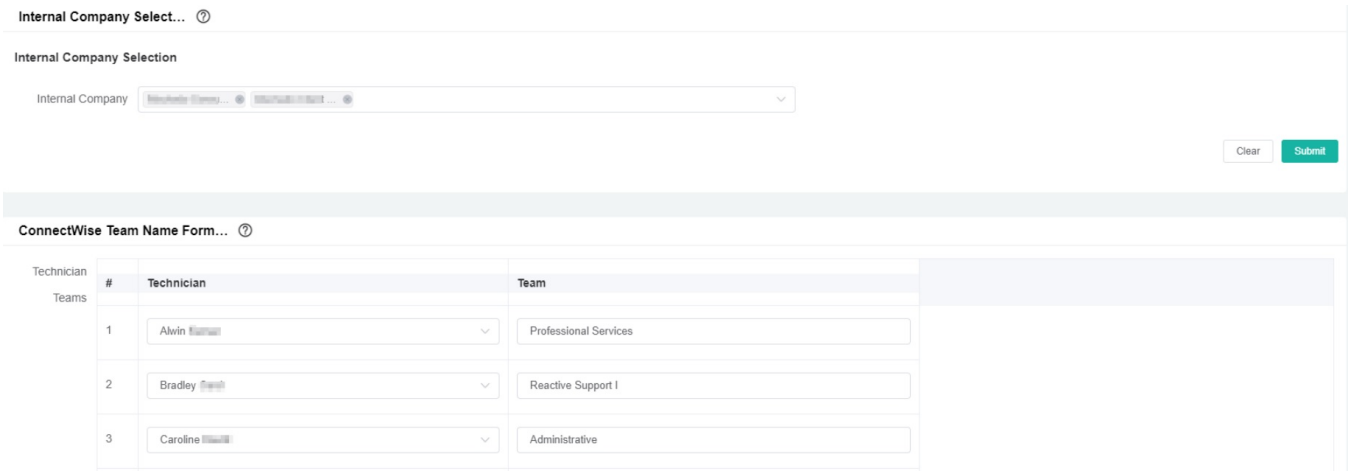
12. Team Utilization - Non-Business Hours Dashboard

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.

13. Team Utilization Suites Settings for App Package

- **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.
- **ConnectWise Team Name Formlist:** If the user does not want to utilize the ConnectWise mapping for Job Title, the user can list down all technici ans and assign a team to each one.



13.1. Related Topics

- Team Utilization Suite for Autotask Integration