

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?

This page contains the following information:

1. List of Dashboards and Descriptions
 2. Terms and Calculations
 3. Team Utilization - Summary Dashboard
 4. Team Utilization - Comparison Dashboard
 5. Team Utilization - Compare Periods Dashboard
 6. Team Utilization - Compare Teams Dashboard
 7. Team Utilization - Work Category Dashboard
 8. Team Utilization - Non-Billable Time Dashboard
 9. Team Utilization - Daily Time Span Dashboard
 10. Team Utilization - Daily Chart Dashboard
 11. Team Utilization - Weekly Chart Dashboard
 12. Team Utilization - Non-Business Hours Dashboard
 13. Team Utilization Suites Settings for App Package
- 13.1. Related Topics

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 | <p>This contains settings for dashboards under the Team Utilization suites for ConnectWise Manage 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

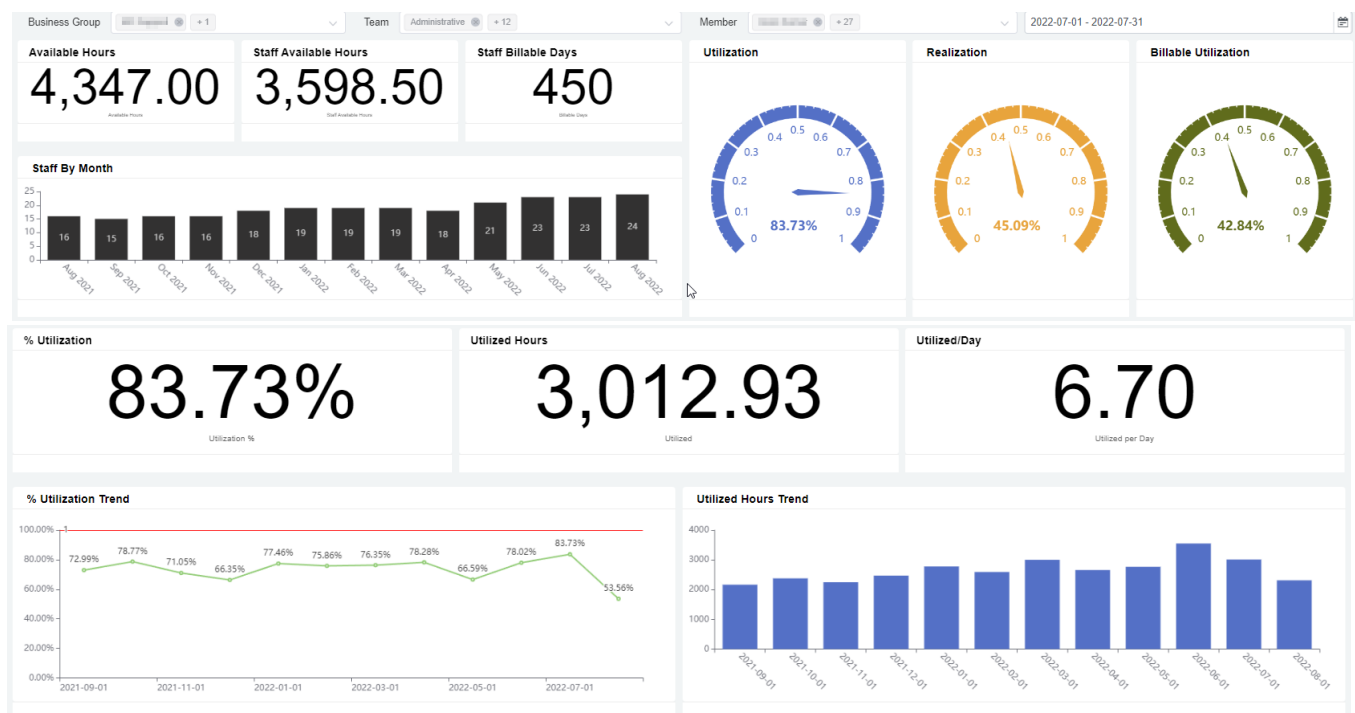
| Term | Definition/Calculation |
|-----------------------|---|
| Available Hours | Daily capacity recorded per member multiplied by the number of weekdays for the selected date range |
| Staff Available Hours | Available Hours less PTO hours |

| | |
|-------------------------|--|
| 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 | 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.

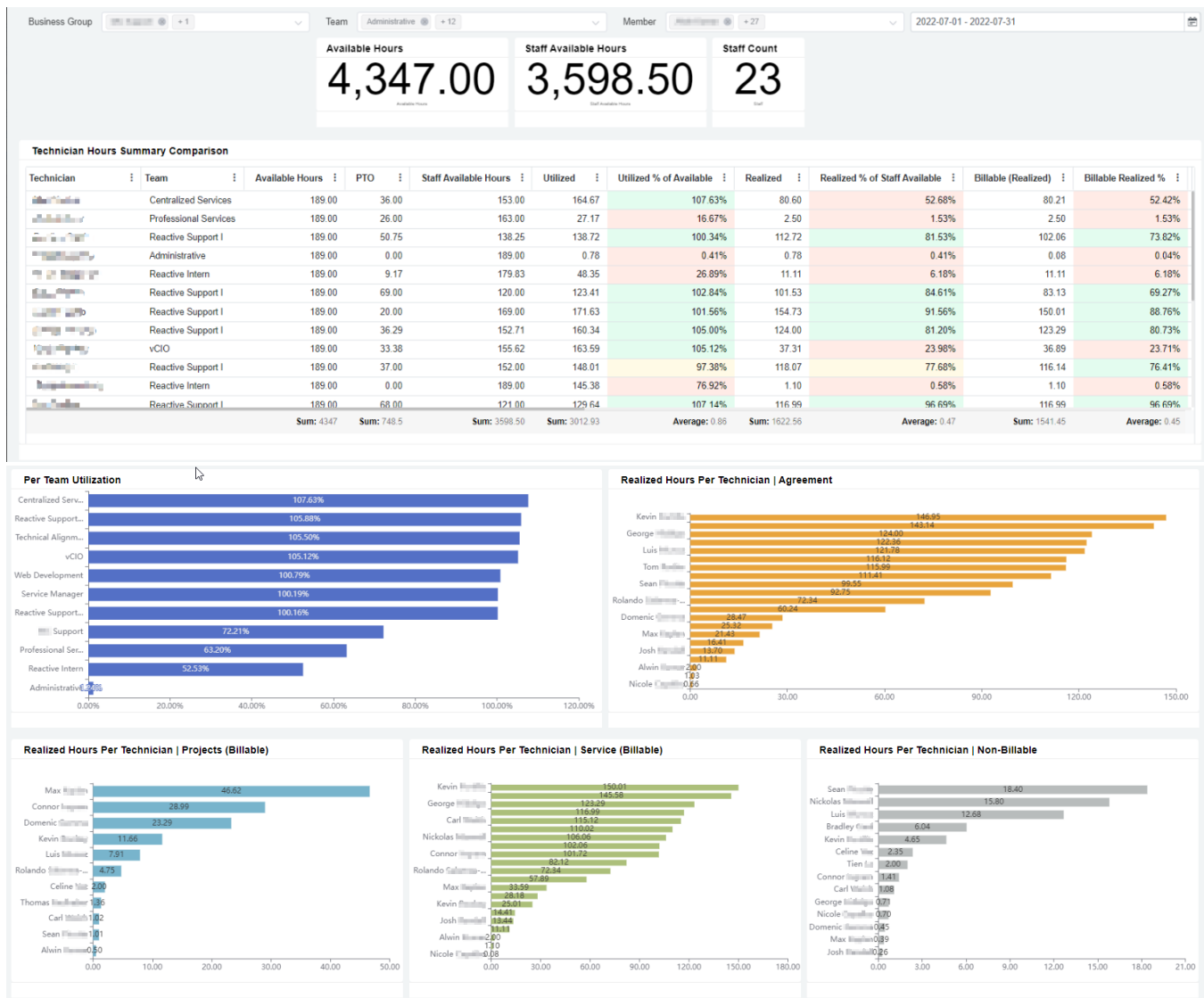
The available slicers are Business Group, Team, Technician, and Date Range slicers.



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.

Business Group

Support + 1

Team

Administrative + 12

Technician

Holder Available + 27

Pre Period

2022-07-01 - 2022-07-31

Pre Period Technician Hours Summary (Period)

| Technician | Team | Available Hours | PTO | Staff Available Hours | Utilized | Utilized % of Available | Realized | Realized % of Staff Available | Billable (Realized) | Billable Realized % | Billable(Realized) per D |
|------------------|-----------------------|-----------------|------------|-----------------------|--------------|-------------------------|--------------|-------------------------------|---------------------|---------------------|--------------------------|
| Max Higgins | Centralized Services | 180.00 | 24.00 | 156.00 | 136.98 | 87.81% | 65.10 | 41.73% | 62.98 | 40.37% | |
| Alvin Mann | Professional Services | 180.00 | 24.00 | 156.00 | 19.50 | 12.50% | 2.00 | 1.28% | 2.00 | 1.28% | |
| Bradley Carr | Reactive Support I | 180.00 | 15.00 | 165.00 | 155.47 | 94.22% | 129.95 | 78.76% | 119.10 | 72.18% | |
| Nicole Campbell | Administrative | 180.00 | 0.00 | 180.00 | 0.09 | 0.05% | 0.09 | 0.05% | 0.00 | 0.00% | |
| Darlin Rodriguez | Reactive Intern | 180.00 | 0.00 | 180.00 | 159.05 | 88.36% | 39.52 | 21.96% | 39.52 | 21.96% | |
| Sean Plummer | Reactive Support I | 180.00 | 20.98 | 159.02 | 153.66 | 96.63% | 131.40 | 82.63% | 111.08 | 69.85% | |
| Kevin Phillips | Reactive Support I | 180.00 | 25.55 | 154.45 | 135.05 | 87.44% | 122.41 | 79.26% | 121.79 | 78.85% | |
| | | Sum: 4320 | Sum: 559.1 | Sum: 3760.90 | Sum: 2802.98 | Average: 0.76 | Sum: 1510.07 | Average: 0.42 | Sum: 1432.38 | Average: 0.4 | Average |

Post Period

2022-08-01 - 2022-08-31

Post Period Technician Hours Summary (Period)

| Technician | Team | Available Hours | PTO | Staff Available Hours | Utilized | Utilized % of Available | Realized | Realized % of Staff Available | Billable (Realized) | Billable Realized % | Billable(Realized) per D |
|------------------|-----------------------|-----------------|------------|-----------------------|--------------|-------------------------|--------------|-------------------------------|---------------------|---------------------|--------------------------|
| Max Higgins | Centralized Services | 189.00 | 36.00 | 153.00 | 164.67 | 107.63% | 80.60 | 52.68% | 80.21 | 52.42% | |
| Alvin Mann | Professional Services | 189.00 | 26.00 | 163.00 | 27.17 | 16.67% | 2.50 | 1.53% | 2.50 | 1.53% | |
| Bradley Carr | Reactive Support I | 189.00 | 50.75 | 138.25 | 138.72 | 100.34% | 112.72 | 81.53% | 102.06 | 73.82% | |
| Nicole Campbell | Administrative | 189.00 | 0.00 | 189.00 | 0.78 | 0.41% | 0.78 | 0.41% | 0.08 | 0.04% | |
| Darlin Rodriguez | Reactive Intern | 189.00 | 9.17 | 179.83 | 48.35 | 26.89% | 11.11 | 6.18% | 11.11 | 6.18% | |
| | | Sum: 4347 | Sum: 748.5 | Sum: 3598.50 | Sum: 3012.93 | Average: 0.86 | Sum: 1622.56 | Average: 0.47 | Sum: 1541.45 | Average: 0.45 | Average |

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 | Sum: 3319.90 | Sum: 2816.35 | Average: 0.82 | Sum: 1519.27 | Average: 0.32 | Sum: 1441.15 | Average: 0.25 | Sum: 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% | |
| Technical Intern | 189.00 | 155.62 | 163.59 | 105.12% | 37.31 | 23.98% | 36.89 | 23.71% | 11.99 | 7.70% | |
| Sum: | | 4221 | Sum: 3472.5 | Sum: 3012.93 | Average: 0.83 | Sum: 1622.56 | Average: 0.33 | Sum: 1541.45 | Average: 0.24 | Sum: 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.

Business Group

Support + 1

Team

Administrative + 12

Technician

Holder + 27

2022-07-26 - 2022-08-25

Work Category Hours | Per Team

Sum of Hours

Sum of % of Total

Avg of % of Row Total

Drop filter here

Work Category

| Team | Activity | ChargeCode | | | ProjectTicket | | | ServiceTicket | | | null | | | | |
|-----------------------|----------|------------|----------------|--------|---------------|----------------|-------|---------------|----------------|--------|------------|----------------|--------|------------|----------------|
| | Hours | % of Total | % of Row To... | Hours | % of Total | % of Row To... | Hours | % of Total | % of Row To... | Hours | % of Total | % of Row To... | Hours | % of Total | % of Row To... |
| Administrative | | | | | | | | | | 0.21 | 0.01% | 100.00% | | | |
| Centralized Services | | | | 88.92 | 2.18% | 44.82% | 49.22 | 1.20% | 24.81% | 60.27 | 1.48% | 30.38% | | | |
| Support | | | | 152.34 | 3.73% | 38.07% | 14.50 | 0.35% | 3.62% | 85.29 | 2.09% | 21.32% | 148.00 | 3.62% | 36.99% |
| Professional Services | | | | 33.62 | 0.82% | 14.99% | 2.50 | 0.06% | 1.11% | 188.15 | 4.61% | 83.89% | | | |
| Reactive Intern | | | | | | | | | | 323.23 | 7.91% | 100.00% | | | |

Business Unit Hours | Per Team

Sum of Hours

Sum of % of Total

Avg of % of Row Total

Drop filter here

Business Unit

| Team | MC Support | (Empty) | | | (Empty) | | | (Empty) | | | | |
|-----------------------|------------|------------|----------------|-------|------------|----------------|--------|------------|----------------|-------|------------|----------------|
| | Hours | % of Total | % of Row Total | Hours | % of Total | % of Row Total | Hours | % of Total | % of Row Total | Hours | % of Total | % of Row Total |
| Administrative | | 0.21 | 0.01% | | 100.00% | | | | | | | |
| Centralized Services | | 198.41 | 4.86% | | 100.00% | | | | | | | |
| Support | | 400.13 | 9.80% | | 100.00% | | | | | | | |
| Professional Services | | 52.50 | 1.29% | | 23.41% | | 171.77 | 4.20% | | | | 76.59% |
| Reactive Intern | | | | | | | 323.23 | 7.91% | | | | 100.00% |

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

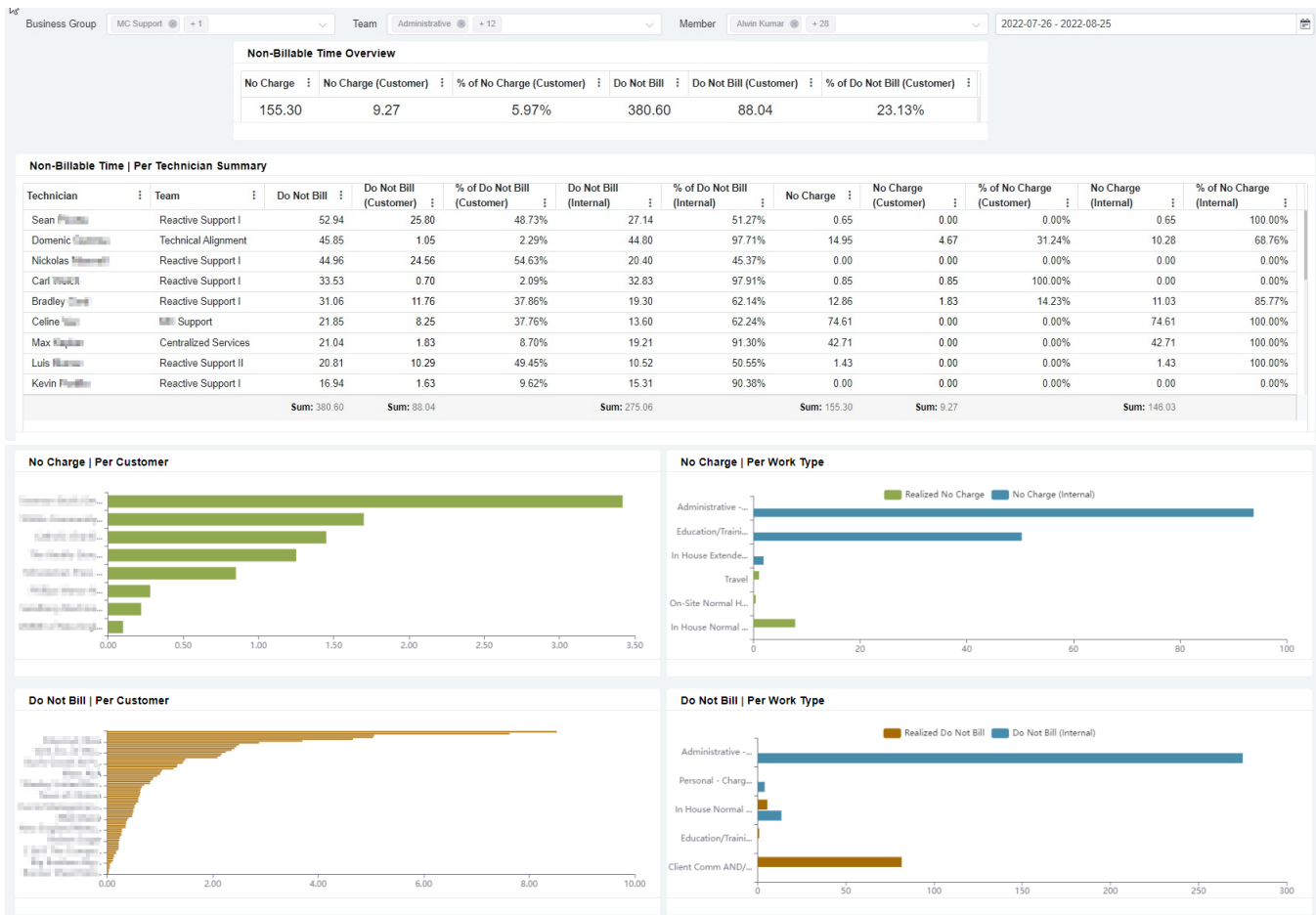
Business Unit

| 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% | | | |

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.

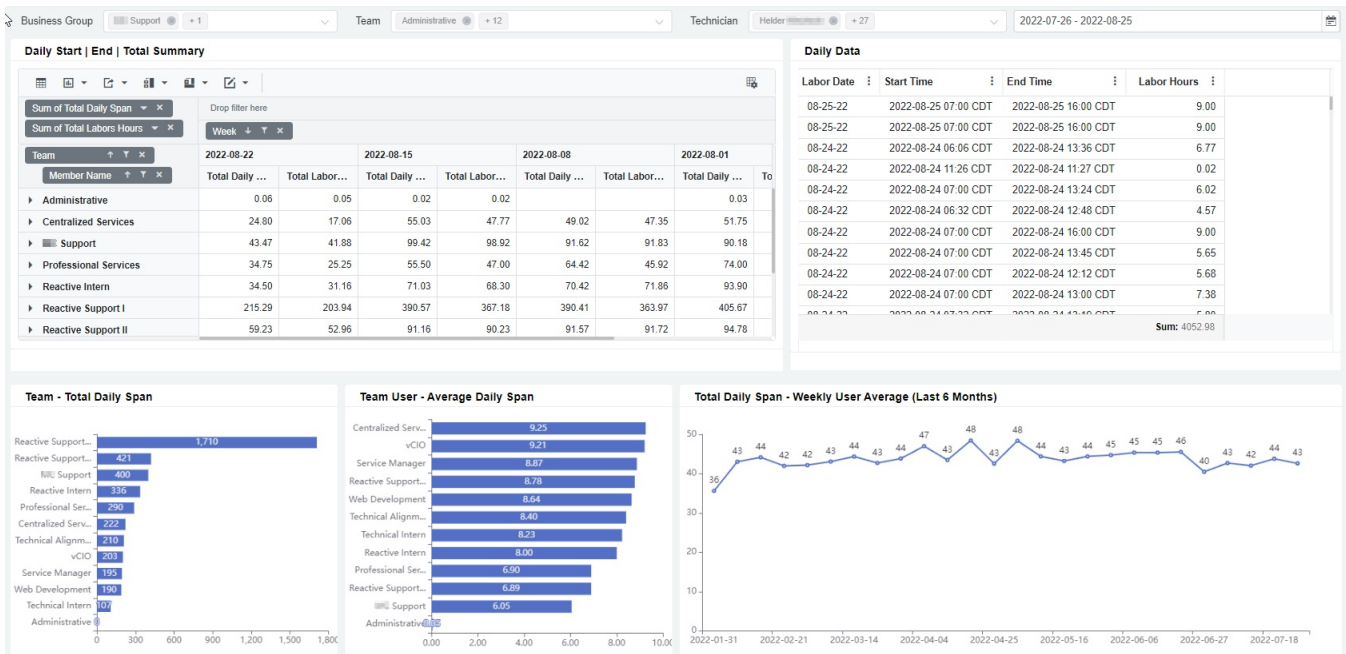
The available slicers are Business Group, Team, Technician, and Date Range slicers.



9. Team Utilization - Daily Time Span Dashboard

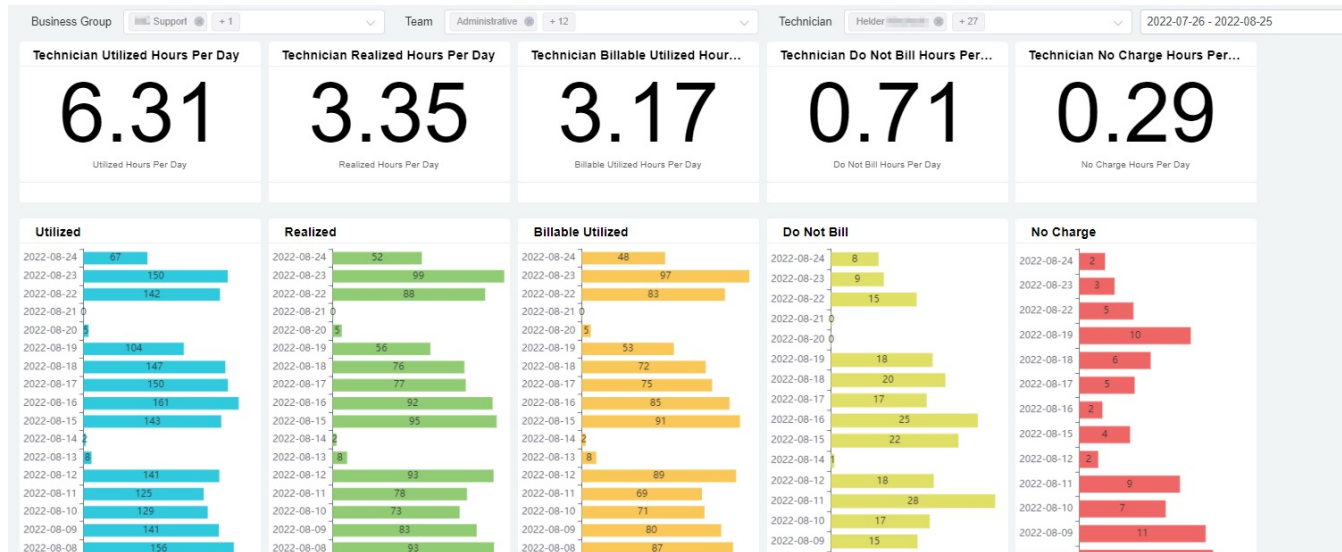
This dashboard shows a comparison between the computed Total Daily Span (hours spent by a technician) and Total Labor Hours (hours logged for work by a technician).

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 technicians and assign a team to each one.

Internal Company Select... ?

Internal Company Selection

Internal Company Internal Company ... Internal Company ...

Clear

Submit

ConnectWise Team Name Form... ?

| Technician Teams | # | Technician | Team | |
|---------------------|---|-----------------------|-----------------------|--|
| | | | | |
| | 1 | Alvin | Professional Services | |
| | 2 | Bradley | Reactive Support I | |
| | 3 | Caroline | Administrative | |

13.1. Related Topics

- [Team Utilization Suite for Autotask Integration](#)