

Engineer Utilization

Description: The Engineer Utilization Report displays total hours worked and billed summarized by member and time type (Project, T&M, Agreement, and Internal Hours). It also summarizes invoiced amount, average bill rate, and billable utilization by member. This report provides the ability to drill down to the time entry level, and view detailed results by company, time type, project, date, and related notes.

Purpose: The intended purpose of this report is to review actual engineer utilization and compare the results to utilization goals for each member.

Criteria

Parameter	Description
Begin Date	This parameter defines the begin date for the time entry period displayed.
End Date	This parameter defines the end date for the time entry period displayed.
Business Unit	Filtering on this parameter will only display time entries for a specific Business Unit.

Report Fields

Report Field	Description	ConnectWise Screen	ConnectWise Field
Business Unit	The Business Unit that the time entry is categorized under.	Time Entry	Business Unit
Company	The customer that is being billed.	Time Entry	Charge To
Date	The date that work was completed on.	Time Entry	Date
Engineer	The engineer who entered the time.	Time Entry	Member
Internal Hours	Total hours worked that are charged to internal projects, agreements, and service tickets plus time tracked against Charge Codes that have a Work Type with the Utilization flag turned on.	Time Entry	WIP Hours
Notes	The details of work that was completed during the time.	Time Entry	Notes
Project	The project, agreement, or service ticket that the time is tracked under.	Time Entry	Charge To
Worked Hours (Agreement)	Total hours worked that are charged to agreements. These hours will be listed as App Hrs on the Time tab of the Agreement.	Time Entry	WIP Hours
Worked Hours (Project)	Total hours worked that are charged to projects.	Time Entry	WIP Hours
Worked Hours (T&M)	Total hours worked that are charged to service tickets that are not applied to an agreement.	Time Entry	WIP Hours
Worked Hours (Total)	Total hours worked for projects, T&M, and agreements.	Time Entry	WIP Hours

Report Calculations

Calculation	Description
Available Hours	Number of Work Days Between [Begin Date] and [End Date] * [8 Hours]; Work days are defined on the Calendar tab of the My Company screen.
Average Bill Rate	Average of [Hourly Rate] Where [Billable] = "Billable" and [Hourly Rate] > 0
Billable Utilization %	([Worked Hours (Project)] + [Billed Hours (T&M)] + [Worked Hours (Agreement)]) / [Available Hours] Billable Utilization % may exceed 100% if billed hours total exceeds available hours.
Billed Hours (Agreement)	[Worked Hours] Where [Billable] = "Billable" for agreements only.
Billed Hours (Project)	[Worked Hours] Where [Billable] = "Billable" for projects only.
Billed Hours (T&M)	[Worked Hours] Where [Billable] = "Billable" for T&M only.
Billed Hours (Total)	[Worked Hours] Where [Billable] = "Billable" for projects, T&M, and agreements.

Report Calculations

Calculation	Description
Invoiced Amount	[Billed Hours] * [Hourly Rate]
Time Type	Depending on what is selected in the "Charge To" dropdown on the "Time Entry" screen, this field will display Project, T&M, Agreement, Internal Hours.