

# Employee Time Analysis

PWR301.RPT

Overview ..... 1  
    Purpose of the Report ..... 1  
    When to Produce the Report ..... 1  
    Permissions Required to Access the Report ..... 1  
    Comparing Reports ..... 1  
Sort Options Available ..... 1  
Select Options Available ..... 2  
Format Options ..... 2  
    Presentation Options ..... 2  
Report Layout ..... 3  
Glossary ..... 4

## Overview

### *Purpose of the Report*

The Employee Time Analysis report helps you monitor how effective your staff has been. It allows you to determine how much time each employee spends on each client, project, work code, etc. It is useful in determining the productivity of each employee. Note: This report is a period based report.

### *When to Produce the Report*

Produce the Employee Time Analysis before each Period Close.

### *Permissions Required to Access the Report*

An employee must have 'Administration' checked in the Employee's Permissions to be able to produce this report

### *Comparing Reports*

Because the Employee Time Analysis is a period based report it may not match date based reports such as WIP Ledger, Super WIP Ledger, Complete Ledger, Employee Budget, TimeSheet, or Billing Realization. Because the Employee Time Analysis reflects the current state of the data, it may not match other period based reports that reflect what happened during the period or year such as WIP Reconciliation.

## Sort Options Available

You can determine the order that the employees appear on the report by choosing one or more of the following fields:

- Employee ID
- Employee Name
- Employee Office
- Employee Department
- Employee Manager
- Team ID

## Select Options Available

You can determine which employees will appear on the report by entering a range or a list in one or more of the following fields:

- Employee ID
- Employee Office
- Employee Department
- Employee Manager
- Team ID
- Client
- Engagement
- Project
- Task
- Category
- SubCategory
- Work Code

## Format Options

### *Presentation Options*

You can choose which sections should appear on the report:

- Subtotal Sort - this allows you to control the level of summary detail that appears under each employee.
  - Charge Type
  - Client-Engagement
  - Project
  - Task
  - Category
  - SubCategory
  - Work Code
- Show Productivity - prints a summary of the chargeable time, markup/down, chargeable productivity rate and total productivity rate.
- Show Cost - prints a summary of the cost amount, cost rate, return amount and return rate.

# Report Layout

Employee: (1)

Page: 1

**Billam and Smyle**  
**Employee Time Analysis**  
 For the Period Ending August 31, 1997

(2)	PTD Hours	%	PTD Amount	%	YTD Hours	%	YTD Amount	%
(3)								
<i>{ Detail Summary }</i>								
(4)	(5)	(6)	(7)		(8) (9)		(10) (11)	(12)
<i>{ Employee Totals }</i>								
(13)	(14)		(15)		(16)		(17)	
Effective Rate			(18)				(19)	
<i>{ Productivity }</i>								
Productivity:								
Total Chargeable Time	(20)		(21)		(22)		(23)	
Total MarkUp/Down			(24)				(25)	
Chargeable Productivity Rate			(26)		(27)		(28)	(29)
Total Productivity Rate			(30)		(31)		(32)	(33)
<i>{ Cost }</i>								
Cost Analysis:								
Cost Amount			(34)				(35)	
Cost Rate			(36)				(37)	
Return Amount			(38)				(39)	
Return Rate			(40)				(41)	

- (1) Calculated field: Employee ID of Employee producing the report
  - (2) Calculated field: The text for the lowest sort chosen in the Subtotal Sort on the Format tab.
  - (3) Calculated field: The sort field selected at report runtime on the Sort/Subtotal tab.
- { Detail Summary }**
- (4) Calculated field: The sort field selected at report runtime in the Subtotal Sort on the Format tab.
  - (5) Calculated field: The sum of Hours field divided by 100 in WIP records with TranType 'T' and PeriodNum equal to the current period.
  - (6) Calculated field: If (14) is not equal to zero then (5) divided by (14) times 100, otherwise it is zero.
  - (7) Calculated field: The sum of AdjAmount field in WIP records with TranType 'T' and PeriodNum equal to the current period.
  - (8) Calculated field: If (15) is not equal to zero then (7) divided by (15) times 100, otherwise it is zero.
  - (9) Calculated field: The sum of Hours field divided by 100 in WIP records with TranType 'T' and PeriodNum greater than the prior year end period number and less than or equal to the current period number.
  - (10) Calculated field: If (16) is not equal to zero then (9) divided by (16) times 100, otherwise it is zero.
  - (11) Calculated field: The sum of AdjAmount field in WIP records with TranType 'T' and PeriodNum greater than the prior year end period number and less than or equal to the current period number.
  - (12) Calculated field: If (17) is not equal to zero then (11) divided by (17) times 100, otherwise it is zero.

**{ Employee Totals }**

- (13) Calculated field: If there is something selected in the Subtotal Sort, then this prints 'Total' plus the employee id and name, otherwise this is blank.
- (14) Calculated field: The sum of Hours field divided by 100 in WIP records with TranType 'T' and PeriodNum equal to the current period.
- (15) Calculated field: The sum of AdjAmount field in WIP records with TranType 'T' and PeriodNum equal to the current period.
- (16) Calculated field: The sum of Hours field divided by 100 in WIP records with TranType 'T' and PeriodNum greater than the prior year end period number and less than or equal to the current period number.
- (17) Calculated field: The sum of AdjAmount field in WIP records with TranType 'T' and PeriodNum greater than the prior year end period number and less than or equal to the current period number.
- (18) Calculated field: If (14) is not equal to zero then (15) divided by (14), otherwise it is zero.
- (19) Calculated field: If (16) is not equal to zero then (17) divided by (16), otherwise it is zero.

**{ Productivity }**

- (20) Calculated field: The sum of Hours field divided by 100 in WIP records with TranType 'T', Chargeable 'C' in the WORKCODE record and PeriodNum equal to the current period.
- (21) Calculated field: The sum of AdjAmount field in WIP records with TranType 'T', Chargeable 'C' in the WORKCODE record and PeriodNum equal to the current period.
- (22) Calculated field: The sum of Hours field divided by 100 in WIP records with TranType 'T', Chargeable 'C' in the WORKCODE record and PeriodNum greater than the prior year end period number and less than or equal to the current period number.
- (23) Calculated field: The sum of AdjAmount field in WIP records with TranType 'T', Chargeable 'C' in the WORKCODE record and PeriodNum greater than the prior year end period number and less than or equal to the current period number.
- (24) Calculated field: The sum of MarkupAmount field in WIP records with TranType 'T', BillingStatus 'B', History 'T', ApplyToTimeAnalysis True, and BilledPeriodNum equal to the current period.
- (25) Calculated field: The sum of MarkupAmount field in WIP records with TranType 'T', BillingStatus 'B', History 'T', ApplyToTimeAnalysis True, and BilledPeriodNum greater than the prior year end period number and less than or equal to the current period number.
- (26) Calculated field: If (20) is not equal to zero then the sum (21) and (24), divided by (20), otherwise it is zero.
- (27) Calculated field: If (21) is not equal to zero then the sum (21) and (24), divided by (21), times 100, otherwise it is zero.
- (28) Calculated field: If (22) is not equal to zero then the sum (23) and (25), divided by (22), otherwise it is zero.
- (29) Calculated field: If (23) is not equal to zero then the sum (23) and (25), divided by (23), times 100, otherwise it is zero.
- (30) Calculated field: If (14) is not equal to zero then the sum (21) and (24), divided by (14), otherwise it is zero.
- (31) Calculated field: If (15) is not equal to zero then the sum (21) and (24), divided by (15), times 100, otherwise it is zero.
- (32) Calculated field: If (17) is not equal to zero then the sum (23) and (25), divided by (16), otherwise it is zero.
- (33) Calculated field: If (17) is not equal to zero then the sum (23) and (25), divided by (17), times 100, otherwise it is zero.

**{ Cost }**

- (34) Calculated field: The sum of Cost field in WIP records with TranType 'T' and PeriodNum equal to the current period.
- (35) Calculated field: The sum of Cost field in WIP records with TranType 'T' and PeriodNum greater than the prior year end period number and less than or equal to the current period number.
- (36) Calculated field: If (14) is not equal to zero then (34), divided by (14), otherwise it is zero.
- (37) Calculated field: If (16) is not equal to zero then (35), divided by (16), otherwise it is zero.
- (38) Calculated field The sum of (21) and (24) less (34).
- (39) Calculated field The sum of (23) and (25) less (35).
- (40) Calculated field: If (14) is not equal to zero then (38), divided by (14), otherwise it is zero.
- (41) Calculated field: If (16) is not equal to zero then (39), divided by (16), otherwise it is zero.

## Glossary

A/R activity - consists of Invoices, Tax, Finance Charges, Payments, and Adjustments.

Current state report - a report that reflects the data as it is now, without regard to what happened during the period or year. See also Point in time report.

Date based report - a report that filters transactions or accumulates amounts based on the date of the transaction rather than when the transaction was posted. For example, if a transaction dated in January

was not posted until after January had been closed, a date based report would report as if the transaction was entered in January. See also Period based report.

Future dated A/R activity - any A/R activity with a PeriodNum greater than the current period.

Future dated WIP activity - any WIP activity with a PeriodNum or BilledPeriodNum greater than the current period.

Period based report - a report that filters transactions or accumulates amounts based on when the transaction was posted rather than the date of the transaction. For example, if a transaction dated in January was not posted until after January had been closed and the current period was February, a period based report would report as if the transaction was entered in February. See also Date based report.

Point in time report - a report that reflects the data as it was posted during a period of time, without regard to the current state of the data. For example, the PTD WIP Reconciliation shows how much time was posted to an account during the current period, not how much is left in the account when the report is printed. See also Current state report.

PTD - Period-to-date.

WIP activity - consists of Time, Expenses, Billings, MarkUps, MarkDowns, and Transfers in WIP.

YTD - Year-to-date.