

# Workforce Performance Dashboard

From: 01/05/2024 to 25/02/2025



Home Page



Employee Report



Task Report



MIS Report



235

Total Employee



3896

Total Task



1018

Total Open Task



53

Total Client



2,41,214.02

Total Hours Booked





# Employee Report

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## Employee Report

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Fiscal Year

Month

Designation

RM - 1

RM-2

Individual

Project Name

Project Type

Work Type

FY 2024-25

All

All

All

All

All

All

All

All

Total Employees



PM : 232 | 1.29% ▲

Total Hours Booked



PM : 220956.06 | 9.17% ▲

Billable Hours



PM : 157055.28 | 9.77% ▲

Non Billable Hours



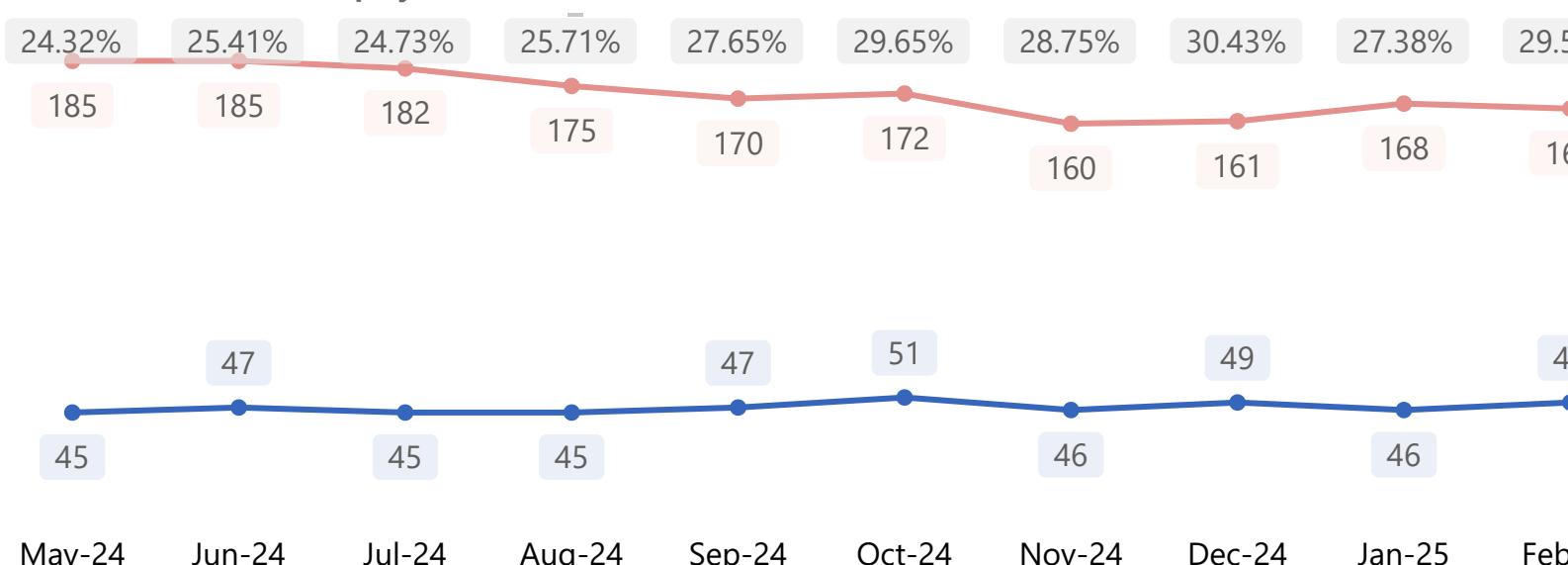
PM : 63900.38 | 7.70% ▲

Total Salary Paid Hours



PM : 256606.50 | 0.00%

### Utilization Report

[Avg. Hours Per Day](#)
[Billable v/s Salary Hours](#)
[Billable v/s Time Booked](#)
[Client v/s Employee](#)
[Time Booked v/s Salary](#)
● Client
● Employee


### Designation Wise No. Of Hours Booked

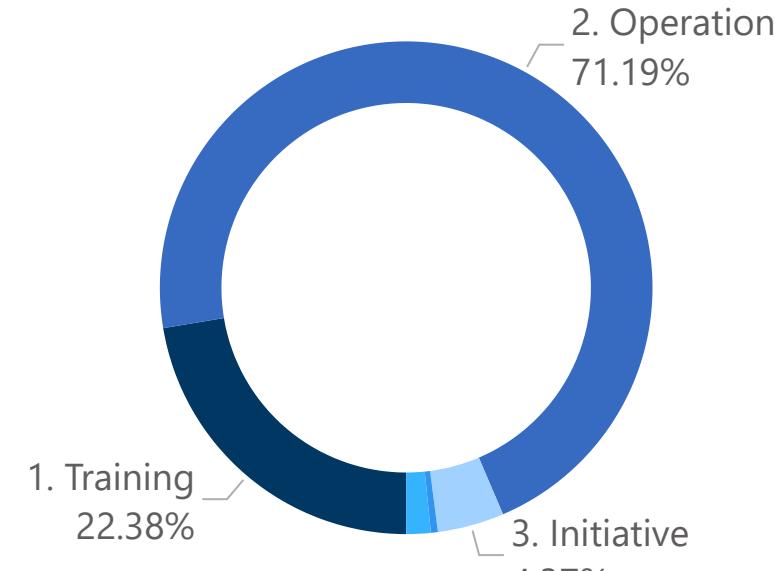
● Billable
● Non Billable

Advanced Analyst	72.68%	27.32%	22.19%
Senior Analyst I	78.18%	21.82%	20.22%
Assistant Manager	72.99%	26.99%	14.01%
Senior Analyst II	76.10%	23.90%	11.85%
Analyst	66.77%	33.23%	10.10%
Manager	66.77%	33.23%	8.41%

### Project Wise No. Of Employees

Cross Team	108
Cabrillo	60
TB_Cabrillo	57
TB_Shareworks+	57
TB_Adams Capital+	37
TB_New Joiners	37
AMC	33

### Non Billable Hours Breakup



### Employee Report

Full Name	Available Hrs	Time Booked	Salary Paid Hrs	Billable Hrs	Non Billable Hrs	Average Daily Hrs	Time Off Hrs	Utilization% Bill/Available	Utilization% Bill/Salary
Vivek Shah	1768.00	2,565.07	1568.25	1741.03	824.04	11.53	199.75	98.47%	111.02%
Siddhi Shah	1768.00	2,248.58	1428.00	1616.18	632.40	11.28	340.00	91.41%	113.18%
Vikas Fofandi	1768.00	2,088.10	1538.50	1634.35	453.35	10.23	229.50	92.44%	106.23%
Prasanna Ponnekanti	1768.00	2,001.21	1470.50	1728.16	273.05	10.22	297.50	97.75%	117.52%
Kushal Kapoor	1768.00	1,981.38	1419.50	1685.51	295.47	10.23	348.50	95.33%	118.74%
Dishant Vora	1768.00	1,924.17	1538.50	1506.41	417.36	9.43	229.50	85.20%	97.91%
Kaushik Bhupatbhai Valia	1768.00	1,920.45	1411.00	1358.55	561.50	10.26	357.00	76.84%	96.28%
Idhikash Seenivasan	1768.00	1,871.23	1538.50	1248.17	623.06	9.08	229.50	70.60%	81.13%
Rohan Raj	1768.00	1,848.30	1504.50	1135.00	713.30	9.35	263.50	64.20%	75.44%
<b>Total</b>	<b>373490.00</b>	<b>2,41,214.02</b>	<b>256606.50</b>	<b>172393.38</b>	<b>68820.24</b>	<b>852.21</b>	<b>1,16,883.50</b>	<b>46.16%</b>	<b>67.18%</b>



# Task Report

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RM - 1

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Individual

Project Name

Project Type

Work Type

FY 2024-25

All

All

All

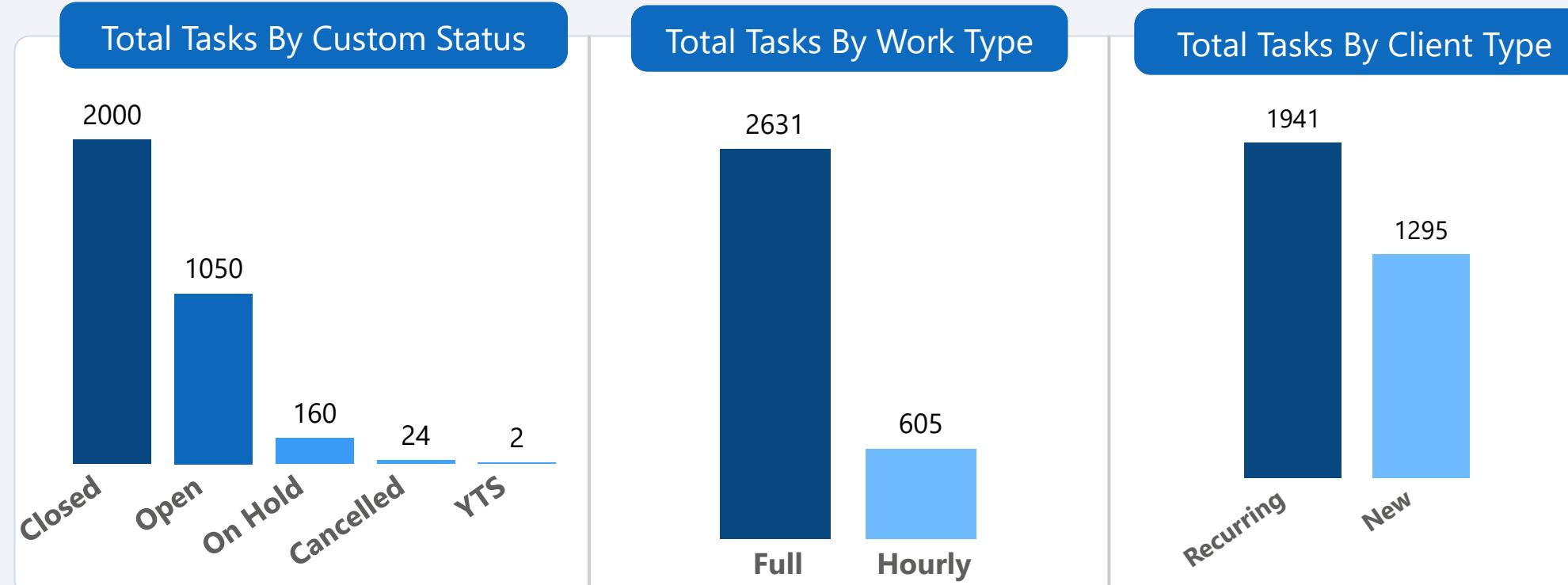
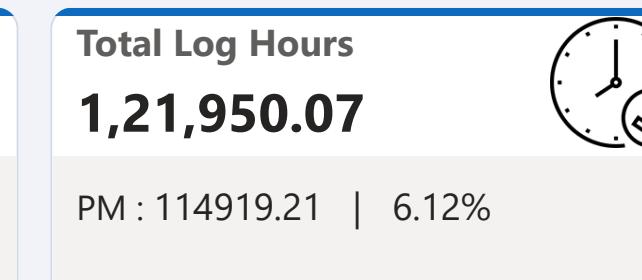
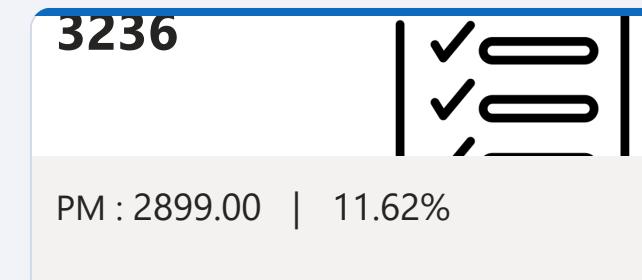
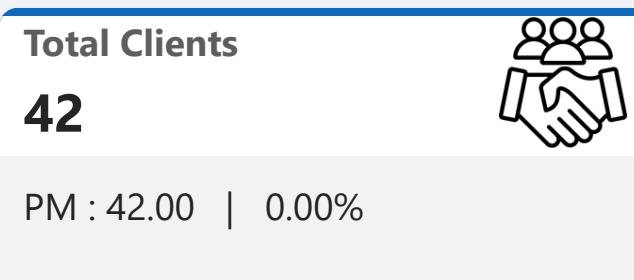
All

All

All

All

All



Standard vs. Actual Project Hrs.				
Project Type	Std. Hours	Actual Hours	Project Count	% Difference
Portfolio/Fund Valuations	2899	97.05	80	-96.65%
BEV	1565	27.19	824	-98.26%
409A	1344	36.68	1043	-97.27%
Gift and Estate Tax	1306	50.08	267	-96.17%
ASC 805	1154	58.63	96	-94.92%
Debt/Convertible Note Valuation	655	36.82	71	-94.38%
IP Valuation	459	63.04	23	-86.26%
Fairness Opinion	448	55.77	3	-87.54%
ASC 350	409	38.33	16	-90.63%
ASC 820	381	31.27	120	-91.70%

## Tasks as Per Tasks Sheet

Project Name	Task Name	Project Type	Work Type	Log Hours	Hours Booked
Acilon	Arsenal Bio Bond Rate Data VD 12.30.2024	Other	Hourly	1.00	1.00
Acilon	Pattern AG Bond Rate Data VD 10.15.2022	Research	Hourly	0.45	0.45
Acilon	SunPower ASC 820 VD 02.14.2024	ASC 820	Hourly	58.45	58.45
Acilon	SunPower Corporation Discount Studies VD 05.30.2024	Discount Studies	Hourly	9.48	9.48
Acilon	SunPower Corporation Discount Studies VD 3.31.2024	Discount Studies	Hourly	6.00	6.00
Acilon	SunPower Corporation Discount Studies VD 5.1.2024	Discount Studies	Hourly	2.00	2.00
Adams Capital	Industrial Cutting Tools_Transaction Advisory_4/30/2024	Transaction Advisory	Hourly	8.02	8.02
Adams Capital	Kalidindi, LLC_G&E_9/30/2024	Gift and Estate	Hourly	20.20	20.20

## Tasks as per Timesheet

Full Name	Task In Timesheet	Hours Booked
Rishi Pahwa	2. Operational	1,205.16
Rakhee Utwani	2. Operational	1,106.15
Vellingiri Prabhu P	2. Operational	872.30
Mayank Agrawal	1. Training	839.54
Ankit Patel	SVG ADMIN - ValueVision	781.55
Vivek Shah	2. Operational	753.59
Rishika Sharma	2. Operational	693.59
Ananya Sawant	2. Operational	688.30
Nishma Shah	2. Operational	676.34
Manish Rathore	2. Operational	668.22
Sunil Shah	2. Operational	662.19
Harsh Oza	2. Operational	641.30



# Industry Report

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Fiscal Year	Month	Designation	RM - 1	RM-2	Individual	Project Name	Project Type	Work Type
FY 2024-25	All	All	All	All	All	All	All	All

**Industry Count**
**22**

KPI\_Prev\_Industry 22.00 | 0.00%

**Total Tasks**
**3236**

PM : 2899.00 | 11.62%

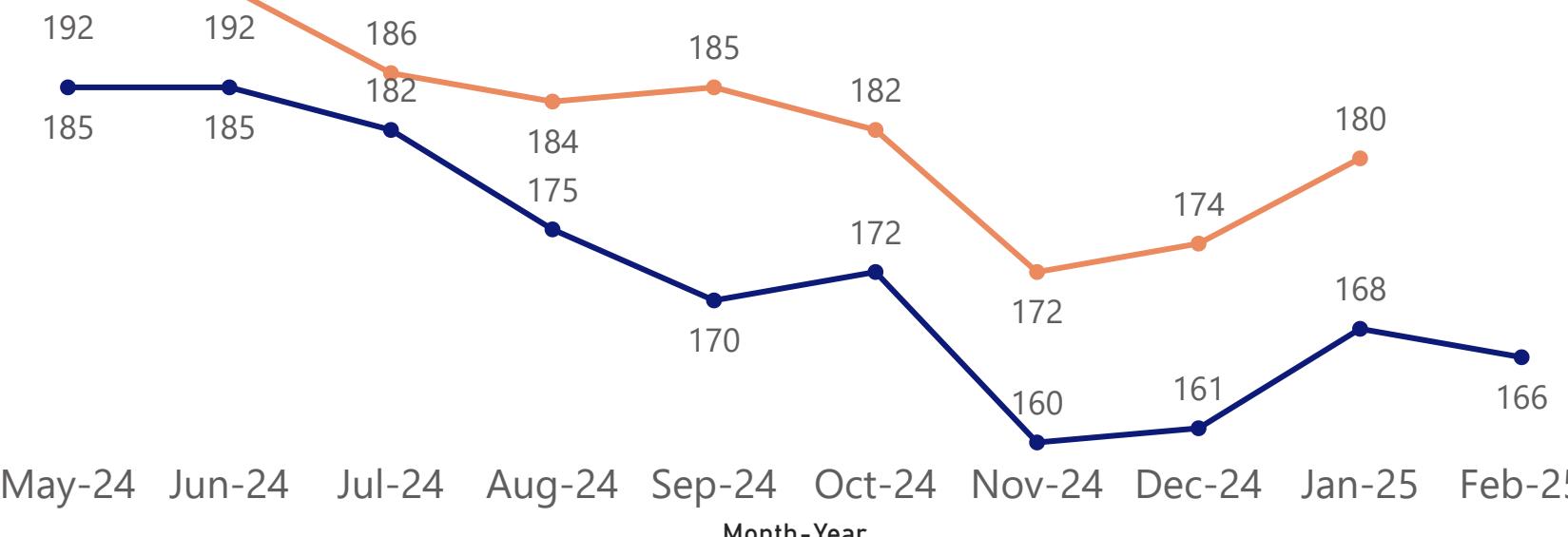
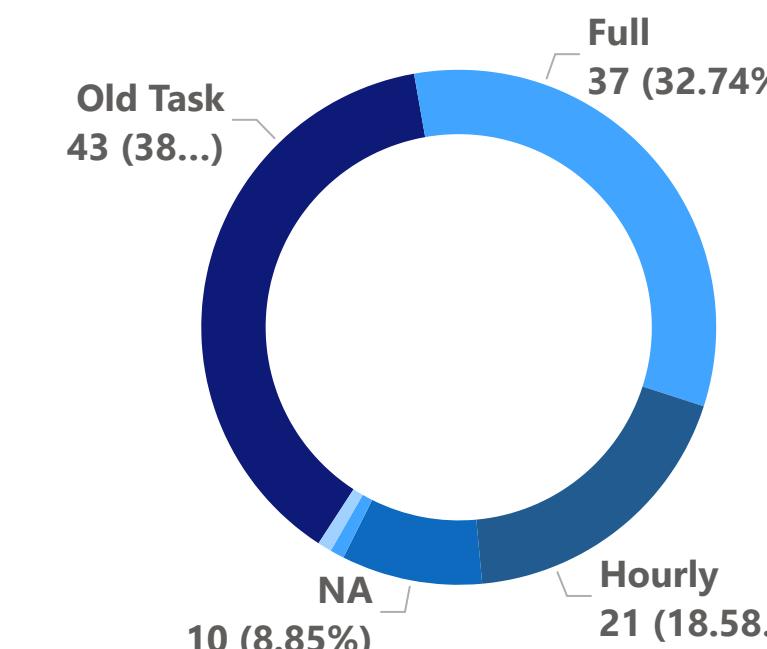
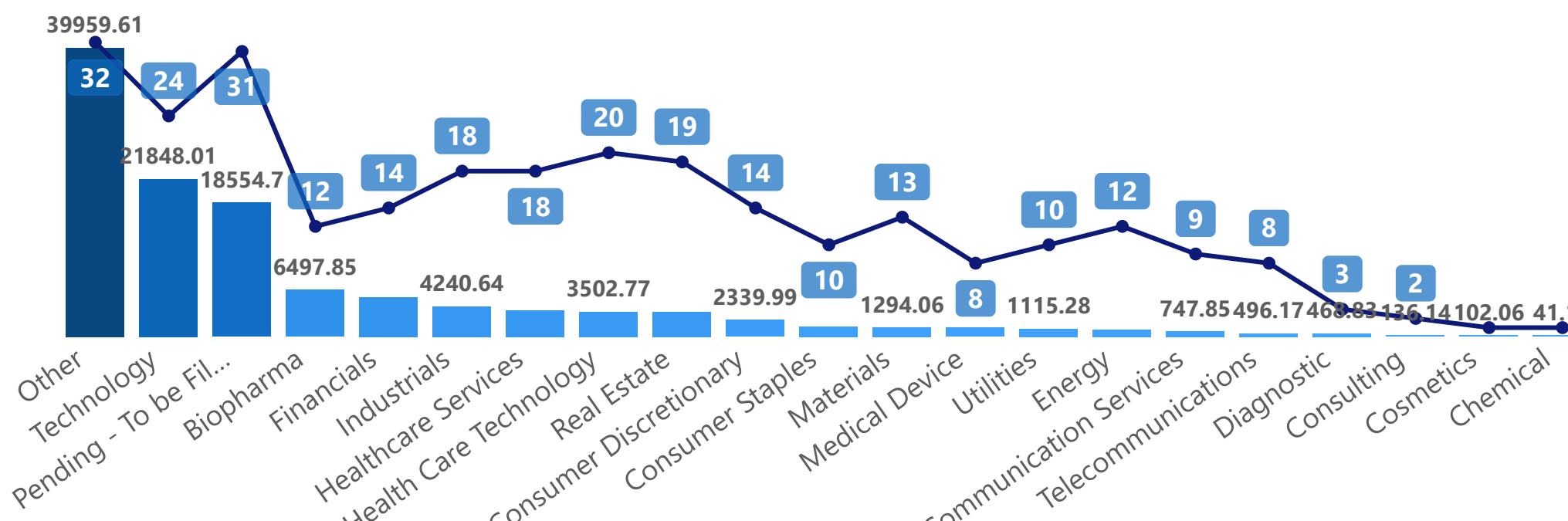
**Total Log Hours**
**1,21,950.07**

PM : 114919.21 | 6.12%

**Project Group Wise Employee Count**

Status • Active • Inactive • Notice period

Ungrouped Projects	99	32	6	137
All Users	79	10	92	
Cabrillo	44	13	59	
Shareworks	18	6	26	
BPM	16	21		
OVP	13	6	21	
ASCG - WTI	10	9	20	
Adams Capital	12	14		
Sofers	9	13		
InvBanking	9	11		
WAB	11	11		

**Salary Employee vs Timesheet Employee**
● Salary Employees ● Timesheet Employee

**Total Project By Work Type**

**Client Industry Wise No. Of Projects**
● Log HrsCal ● Client\_Count

**Industry Report**

General Industry	Billable Hours	Client Count	Employee Count
Biopharma	7454.40	12	119
Chemical	41.15	1	5
Communication Services	886.59	9	56
Consulting	136.54	2	6
Consumer Discretionary	2808.18	14	102
Consumer Staples	1518.15	10	79
Cosmetics	102.06	1	5
Diagnostic	577.35	3	12
Energy	1136.58	12	77
<b>Total</b>	<b>140131.37</b>	<b>42</b>	<b>218</b>



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Fiscal Year	Month	Designation	RM - 1	RM-2	Individual	Project Name	Project Type	Work Type
FY 2024-25	All	All	All	All	All	All	All	All

## Detailed Report

Task	Hours Booked	Billable Hours	Min. Daily Hours	Max. Daily Hours	Avg. Hours Per Day	No. Of Users
68 Ventures, LLC_G&E_9/30/2024	1,386.17	1386.17	0.49	46.15	13.12	11
Annual Confirmations 2024	941.27	941.27	0.10	44.37	11.21	8
OPM BEV Port Valuation 06.30.2024	896.10	896.10	2.00	41.40	20.50	6
Clancy Estate - 6/28/2023 and 12/31/2023	815.59	815.59	0.30	33.33	11.50	14
SVG ADMIN - ValueVision	787.25	787.25	0.30	7.00	4.05	3
Madison Food Corp (BEV) 12.31.2023 - (24754)	560.08	560.08	0.30	60.23	17.30	10
Adhoc Tasks	549.56	549.56	1.00	28.40	8.20	7
Dean_Buyer List and Pitchdeck	543.29	543.29	1.00	40.37	15.32	8
Kalaris ASC 820 VD 05.28.2024	498.02	498.02	0.45	41.00	9.46	5
SVG ADMIN - SVG	475.12	475.12	1.00	7.20	2.32	2
New Vision Information Systems, Inc._Business Transitioning/Selling/Liquidation_05/30/2024	454.11	454.11	1.00	24.30	7.34	9
Hartman & Hartman_Business Transitioning/Selling/Liquidation_06/30/2024	449.52	449.52	1.00	17.00	7.02	7
Dedicated Capital Advisors_Business Transitioning/Selling/Liquidation_05/03/2024	446.47	446.47	0.30	30.00	5.05	8
Andy Heyward	436.43	436.43	0.22	20.15	6.37	6
Estate of Sidewater_BEV_12.31.2023	424.16	424.16	4.00	44.57	13.41	8
Manufacturing Revitalization Corporation of America (MRCA)_ASC 805_5.1.2024	422.19	422.19	0.30	20.25	6.18	9
FCC Portfolio Valuation Q2 2024	416.54	416.54	1.00	20.14	10.10	5
Oscher GST_G&E_12/27/2010	403.32	403.32	0.19	20.17	6.50	7
inDinero, Inc._409A_12/31/2023	400.59	400.59	0.45	24.40	8.01	5
OPM BEV Port Valuation 9.30.2024	390.42	390.42	0.45	37.52	13.01	7
GWM Holding, Inc._BEV_03.31.2024	390.28	390.28	1.15	19.41	6.37	4
Kura Oncology ID 7.30.2024	300.24	300.24	0.15	20.20	0.10	5