Contents

Utilization Analysis

In Utilization analysis there were different filters for selection to look for the data.

1. **Filters**

   1a. Type

   In this type we have different options for selecting the Type

   a. Hierarchy
   b. Business Unit
   c. Customer
   d. Project
   e. Resource
   f. Primary PM

   a. **Hierarchy**: If we select filter as Hierarchy the person can see the data related to the resources assigned to that person.

By Selecting the Hierarchy in type, the Next Selection i.e "Name" will be automatically assigned with the person who is doing the process.

By clinking on search the below data will be populated.

Name	Count	Capacity ❶		Allocations ❶		Bill Alloc ❶		Bill Assgn ❶		Bill Actuals ❶		Bill Appr ❶	
		Gross	Net	Hrs	Net %	Hrs	Net %	Hrs	Net %	Hrs	Net %	Hrs	Net %
👤 Employee	14	2,440	164	-2,058	-1,255	54	33	104	63	128	78	164	100
👤 Contractor	0	0	0	0	0	0	0	0	0	0	0	0	0
Total	14	2,440	164	-2,058	-1,255	54	33	104	63	128	78	164	100

● Holiday ● Leave   **Action Items**   Search : _____   Avg : ___ ˅ ___ %   ‹ Mar 2022 ›   📊

Indicators	Resource	Prj.Manager	Planned Rev	28 M	1 T	2 W	3 T	4 F	5 S	6 S	7 M	8 T	9 W	10 T	11 F	12 S	13 S	14 M	15 T	16 W	17 T	18 F	19 S	20 S	21 M	22 T	23 W	24 T	25 F	26 S	27 S	28 M	29 T	30 W	31 T	1 F	2 S	3 S	Total
● △	👤 Rajeswari Kanupuru	Rajeshwar Rao Akinapelli,...	$ 0		0.00	0	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00				0.00
● △	👤 Abhishek Choudhary	Rajeswari Kanupuru,Sai M...	$ 0		0.00	0	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00				0.00
● △	👤 Aruna Malapati	Kiran Bhashyam,Gouthami...	$ 0		8.00	0	8.00	8.00			8.00	8.00	8.00	8.00	8.00			8.00	8.00	8.00	8.00	8.00			8.00	8.00	8.00	4.00	0.00			8.00	8.00	8.00	8.00				164.00
● △	👤 Bandhavi Sai Yalla	Rajeswari Kanupuru,Sai M...	$ 0		0.00	0	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00				0.00
● △	👤 Devi Thota	Rajeswari Kanupuru,Sai M...	$ 0		0.00	0	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00				0.00
● △	👤 Gudia Prasanna	Rajeshwar Rao Akinapelli,...	$ 0		0.00	0	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00				0.00
● △	👤 Lakshmi Reddy Mula	Rajeshwar Rao Akinapelli,...	$ 0		0.00	0	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00				0.00
● △	👤 Monica Meduri	Rajeshwar Rao Akinapelli,...	$ 0		0.00	0	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00				0.00
● △	👤 Mounika Pathkula	Rajeswari Kanupuru,Sai M...	$ 0		0.00	0	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00				0.00
● △	👤 Rajashri Balajirao G...	Rajeswari Kanupuru,...	$ 0		0.00	0	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00				0.00
● △	👤 Sai Manoj Neeruko...	Rajeshwar Rao Akinapelli,...	$ 0		0.00	0	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00				0.00
● △	👤 Sainath Reddy Poc...	Rajeshwar Rao Akinapelli,...	$ 0		0.00	0	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00				0.00
● △	👤 Shalinee Singh	Rajeswari Kanupuru,Sai M...	$ 0		0.00	0	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00				0.00
● △	👤 Uthej Saireddy Palla	Rajeswari Kanupuru,Sai M...	$ 0		0.00	0	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	0.00				0.00
	Total		$ 0		8.00	0.00	8.00	8.00			8.00	8.00	8.00	8.00	8.00			8.00	8.00	8.00	8.00	8.00			8.00	8.00	8.00	4.00	0.00			8.00	8.00	8.00	8.00				164.00

Showing 14 of 14 entries

b. **Business Unit**: Once we select the Business unit in Type a new selection pops up to select the particular "Business Unit".

Now we can select particular Business Unit or can select "all" and also has an option to select the view in which the data can be populated.

In View we have different types of selection such as "Summary, Resource, BU"

By selecting the view, the data will be populated in the below tables.

By Selecting the available options, the data has been populated for that Business Unit as per the region Wise and Practice wise.

c. **Customer**: By selecting the type as Customer a new selection appears i.e Customer Name, Here needs to select the customer by their name and the particular data related to that customer will be Populated.

d. **Project**: By Selecting the type as "Project" a new selection appears i.e Project Name, here we need to select either Single Project or can select all Projects available.

e. **Resource**: By Selecting the type as "Resource" a new selection appears i.e Resource Name, here we need to select either Single Resource or can select all Resources available.

f. **Primary PM**: By Selecting the type as "Primary PM" a new selection appears i.e. Primary PM, here we need to select the Name of the PM to see the data of all the resources who are tagged to the same projects this Primary PM is tagged.

Utilization Summary

| Name | Count | Capacity | | Allocations | | Bill Alloc | | Bill Assgn | | Bill Actuals | | Bill Appr | | Revenue |
		Gross	Net	Hrs	Net %	Hrs	Net %	Hrs	Net %	Hrs	Net %	Hrs	Net %	Planned
Employee	41	7,144	6,342	6,342	100	110	2	60	1	36	1	0	0 $	0
Contractor	0	0	0	0	0	0	0	0	0	0	0	0	0 $	0
Total	41	7,144	6,342	6,342	100	110	2	60	1	36	1	0	0 $	0

Bench Summary

| Name | Count | Capacity | | Allocations | | Bill Alloc | | Bill Assgn | | Bill Actuals | | Bill Appr | |
		Gross	Net	Hrs	Net %	Hrs	Net %	Hrs	Net %	Hrs	Net %	Hrs	Net %
Employee	41	7,144	6,342	0	0	6,232	98	6,282	99	6,306	99	6,342	100
Contractor	0	0	0	0	0	0	0	0	0	0	0	0	0
Total	41	7,144	6,342	0	0	6,232	98	6,282	99	6,306	99	6,342	100

1b. Res. Location

In this selection there are List of Locations where resources were available, we can select the particular resource location or keep that selection as ALL and can pull the data required.

1c. Eng. Company

This selection is related to the Engagement company while creating the project in the PPM for each project an Engagement company is being mapped now here, we can either select that as ALL or can select the Particular Engagement company.

1d. Cap. Type

In this we have different selections to select such as

a. Net Capacity Hours
b. Allocation Hours
c. Available Hours
d. Assigned Hours
e. Actual Hours
f. Approved Hours
g. Unapproved Hours
h. Variance: Allocation – Assigned Hours
i. Variance: Allocation – Actual Hours
j. Variance: Allocation – Approved Hours
k. Variance: Assigned – Actual Hours
l. Variance: Assigned – Approved Hours
m. Variance: Actual – Approved Hours

a. **Net Capacity Hours:** These are the Standard Hours available for the resource by excluding the Leaves, Weekends and Holidays.
b. **Allocation Hours:** Total no of billable & non-billable planned hours allocated to resource in capacity plan
c. **Available Hours:** These are the Hours available for a resource by removing allocated hours in the Project from the Net Capacity Hrs.
d. **Assigned Hours:** After Creating the Allocation the Tasks hours that are assigned those hours were called Assigned Hrs.
e. **Actual Hours:** These are Hours that are submitted by the resource day by day.

f. **Approved Hours:** These are the Hours which are approved from the Actual Hours Submitted by the resource.
g. **Unapproved Hours:** These are the Hours from the actual hour that are not approved.

1e. Allocation Type

Here we can select the whether we are looking for billable data or else for non-Billable data (Different types in non-Billable)

Different types of allocation types were as below

Non-Billable Innovation: Resource Allocation hours on Innovation projects or tasks.
Non-Billable Client Preparation: These are the hours that are allocated for resources who are getting ready for client interviews or any other preparation.
Non-Billable Enablement: These are the hours that are allocated to resources who are getting ready for client assignments/tasks.
Non-Billable Non utilized: These are the hours that are allocated to resource who are not sure about their tasks but are blocked for the
Software Resale: These are the hours that are allocated for task related to Software Resale
Non-billable: Utilized: These are the hours that are allocated to resources who are working on assignments but not being billed.

1f. Res. Type

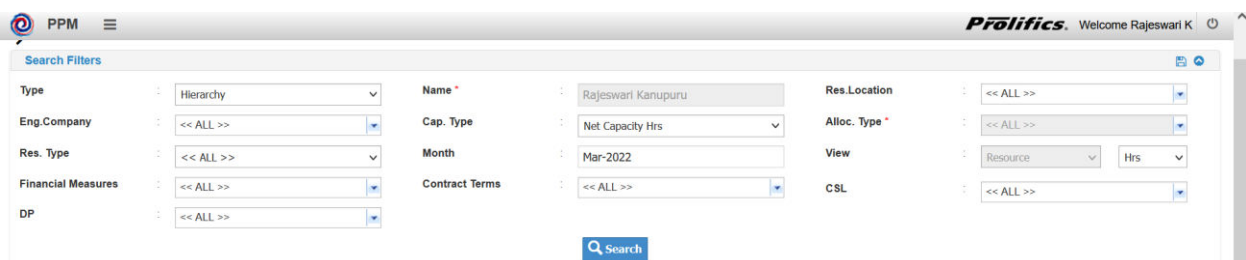This filter is to select the different types of resources based on whether they were Full Time Employee (FTE) or contractors

1g. Month

This filter we can select the Month For which the data need to be populated.

1h. Financial Measures

In this selection regarding the Financial Measures if we select all as a filter can see the Revenue on different aspects for each of the Resource as shown in the table below.

Indicators	Resource	Prj.Manager	Net Cap.	Bill.Appr	Bill.Appr %	Planned Rev	Assigned Rev	Actual Rev	Approved Rev	Recog. Rev	PR Cost (Role)	PR GM (Role)	RR Cost (Role)	RR GM (Role)	28 M	1 T	2 W	3 T	4 F	5 S	6 S	7 M	8 T	9 W	10 T	11 F	12 S	13 S	14 M	15 T
● ⚠	👤 Rajeswari Kanupuru	Rajeshwar Rao Akinapelli,…	0	0	0 %	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0	0 %	$ 0	0 %	0.00	0	0.00	0.00				0.00	0.00	0.00	0.00	0.00			0.00	0.00
● ⚠	👤 Abhishek Choudhary	Rajeswari Kanupuru,Sai M…	0	0	0 %	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0	0 %	$ 0	0 %	0.00	0	0.00	0.00				0.00	0.00	0.00	0.00	0.00			0.00	0.00
● ⚠	👤 Aruna Malapati	Kiran Bhashyam,Gouthami…	164	0	0 %	$ 0	$ 0	$ 0	$ 0	$ 585	$ 585	0 %	$ 585	0 %	8.00	0	8.00	8.00				8.00	8.00	8.00	8.00	8.00			8.00	8.00
● ⚠	👤 Bandhavi Sai Yalla	Rajeswari Kanupuru,Sai M…	0	0	0 %	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0	0 %	$ 0	0 %	0.00	0	0.00	0.00				0.00	0.00	0.00	0.00	0.00			0.00	0.00
● ⚠	👤 Devi Thota	Rajeswari Kanupuru,Sai M…	0	0	0 %	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0	0 %	$ 0	0 %	0.00	0	0.00	0.00				0.00	0.00	0.00	0.00	0.00			0.00	0.00
● ⚠	🌐 Gudla Prasanna	Rajeshwar Rao Akinapelli,…	0	0	0 %	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0	0 %	$ 0	0 %	0.00	0	0.00	0.00				0.00	0.00	0.00	0.00	0.00			0.00	0.00
● ⚠	👤 Lakshmi Reddy Mula	Rajeshwar Rao Akinapelli,…	0	0	0 %	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0	0 %	$ 0	0 %	0.00	0	0.00	0.00				0.00	0.00	0.00	0.00	0.00			0.00	0.00
● ⚠	👤 Monica Meduri	Rajeshwar Rao Akinapelli,…	0	0	0 %	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0	0 %	$ 0	0 %	0.00	0	0.00	0.00				0.00	0.00	0.00	0.00	0.00			0.00	0.00
● ⚠	👤 Mounika Pathkula	Rajeswari Kanupuru,Sai M…	0	0	0 %	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0	0 %	$ 0	0 %	0.00	0	0.00	0.00				0.00	0.00	0.00	0.00	0.00			0.00	0.00
● ⚠	👤 Rajashri Balajirao G…	Rajeshwar Rao Akinapelli,…	0	0	0 %	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0	0 %	$ 0	0 %	0.00	0	0.00	0.00				0.00	0.00	0.00	0.00	0.00			0.00	0.00
● ⚠	👤 Sai Manoj Neeruko…	Rajeshwar Rao Akinapelli,…	0	0	0 %	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0	0 %	$ 0	0 %	0.00	0	0.00	0.00				0.00	0.00	0.00	0.00	0.00			0.00	0.00
● ⚠	👤 Sainath Reddy Poc…	Rajeshwar Rao Akinapelli,…	0	0	0 %	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0	0 %	$ 0	0 %	0.00	0	0.00	0.00				0.00	0.00	0.00	0.00	0.00			0.00	0.00
● ⚠	👤 Shalinee Singh	Rajeswari Kanupuru,Sai M…	0	0	0 %	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0	0 %	$ 0	0 %	0.00	0	0.00	0.00				0.00	0.00	0.00	0.00	0.00			0.00	0.00
● ⚠	👤 Uthej Saireddy Palla	Rajeswari Kanupuru,Sai M…	0	0	0 %	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0	0 %	$ 0	0 %	0.00	0	0.00	0.00				0.00	0.00	0.00	0.00	0.00			0.00	0.00
	Total		164	0	0 %	$ 0	$ 0	$ 0	$ 0	$ 0	$ 585	0 %	$ 585	0 %	8.00	0.00	8.00	8.00				8.00	8.00	8.00	8.00	8.00			8.00	8.00

1i. Contract Terms

These are the terms that are created at the Engagement level of a particular project.

1j. CSL

This is a filter where we can select the customer service lead to populate date related to that CSL.

1k. DP

This is a filter where we can select the Delivery Partner to populate date related to that DP

2. Utilization Summary and Bench Summary

a. **Capacity**: Total Number of hours available for utilization in the period under consideration (month) based on the filter criterion used.
   Gross Capacity: Standard available hours of resource in a day * Gross working Days (Excluding weekends & Holidays)
   Net Capacity: Standard available hours of resource in a day * Net working days (Excluding Weekends, Holidays and Leaves/Time offs)
   Note: Holidays considered are based on the holidays listed in resource calendar

b. **Allocations**: Total no of billable & non billable planned hours allocated to resource in capacity plan

Net %: Percentage of allocation hours over Net Capacity hours

c. **Billable Allocations**: Total billable allocation hours in capacity plan for a resource.

   Net%: Percentage of Billable allocation hours over Net Capacity hours

d. **Billable Assigned**: Total billable assigned hours in task plan for a resource.

   Net %: Percentage of Billable assignment hours over Net Capacity hours

e. **Billable Actuals**: Total billable Actuals hours logged by resource on a billable task.

   Net %: Percentage of Billable actual hours logged over Net Capacity hours

f. **Billable Approved**: Total billable Actuals hours of resource approved by the PM.

   Net %: Percentage of Billable approved hours of project over Net Capacity hours

g. **Revenue**:

   Planned Revenue: Billable allocated hours * Billing rate of a resource in project

   Assigned Revenue: Billable assignments on a billable task * Billing rate of a resource in project

   Actual Revenue: Billable actuals logged * billing rate of a resource

   Approved Revenue: Billable approved hours * billing rate of a resource

3. Functionality in Resource table

3a. Action Items

By Clicking on the action Item, a new window pops up with showing resource details and availabilities

3b. Resource Details

By Selecting any one of the Type and in Cap.Type any selection other than Net capacity Hours then in the resource table then in the Table of resources available if we click on Resource name a toggle with options to look at over view details of the resource.

    a. View Resource's Profile
    b. View Resource's Allocations
    c. Action Item

a. **View Resource's Profile:** By Clicking on this option can see the complete profile of the resource.
Such as Reporting Hierarchy, Resource Details, Customer Roles, Project Roles, Project Details,
Reportee Details, Skill Details, Training Details in each of the tabular formats as shown below.

Reportee Details

Show 5 ∨ entries   Search:

Employee Name	Business Unit	Designation
	No Records To View	
	Previous Next	Showing 0 to 0 of 0 entries

Skill Details

Show 5 ∨ entries   Search:

Skill Group	Skill	Type	Exp(Months)	Rating	Last Used	Status
		No Records To View				
		Previous Next			Showing 0 to 0 of 0 entries	

Training Details

⦿ Current ○ Past ○ All

Show 5 ∨ entries   Search:

Course Name	Registration Date	Completion Date
	No Records To View	
	Previous Next	Showing 0 to 0 of 0 entries

b. **View Resource's Allocation:** By Clicking on this option a new table pops up on the bottom with the details.

c. **Action Item:** By Clicking in the action item a new table pops up with the details.