

5. USING THE EXECUTIVE OVERVIEW

5.1 Introduction

The Executive Overview consists of the All Staff Planner with an additional feature which provides a means to display summary financial information for scheduled work. The Executive Overview presents an overview of the data stored in Resource Tracker, enabling you to see how much income will be generated for a specified time period.

5.2 Displaying the Executive Overview

The Executive Overview allows you to select a week from the calendar and display the total value of the jobs scheduled for the selected week.

To display the figure:

1. Display the Resource Tracker Login screen by double-clicking on the Resource Tracker icon.

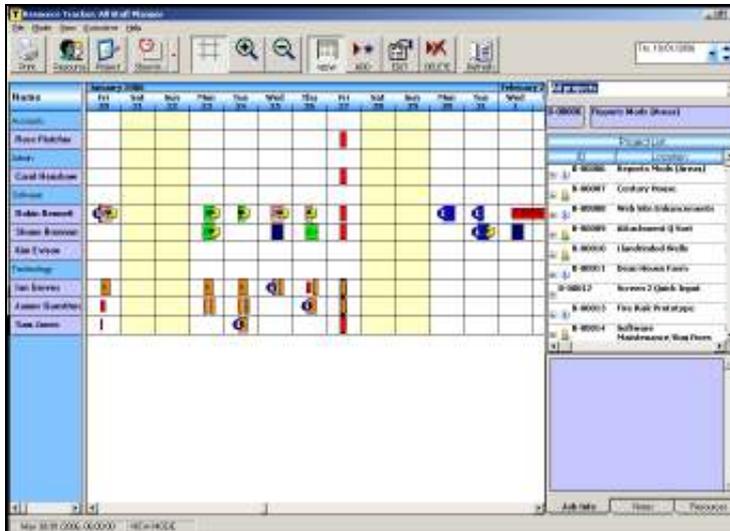


2. Select your name from the drop-down list on the **Name** field.
3. If you have a password, type it in the **Password** field.
4. Select Executive Overview and enter the date of the first day to be available on the calendar in the **Start Date** field.

The start date specifies the starting point of the grid, specifying it reduces the amount of redundant data included and enhances performance.

5. Click on **OK** to display the Executive Overview.

The following screen shows an example of the Executive Overview.



By default, jobs (or projects) are listed on the right-hand side of the screen; members of staff are listed on the left-hand side of the screen.

The default view of the central grid displays 13 days, including weekends, for each member of staff listed. The dates are listed across the top of the grid. The grid is flexible and you can change the view as required.

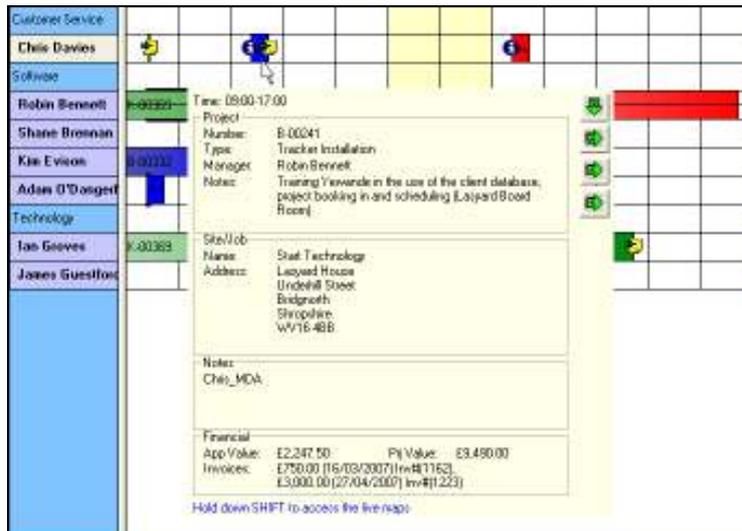
The grid is colour coded as follows:

Colour	Meaning
	Open – there are no bookings on this day which is a Saturday or Sunday
	Open – there are no bookings on this day which is a weekday

Coloured bars may be displayed in the grid to indicate booked time. The colours used are customisable.

6. Point to a booking to display a tooltip which shows job information, including financial details.

If the job has been invoiced, the invoices are listed at the bottom of the tooltip, as in the following example:



- When you have finished working with the Executive Overview, return to the Resource Tracker Login screen by clicking on the  in the top right-hand corner of the Executive Overview.

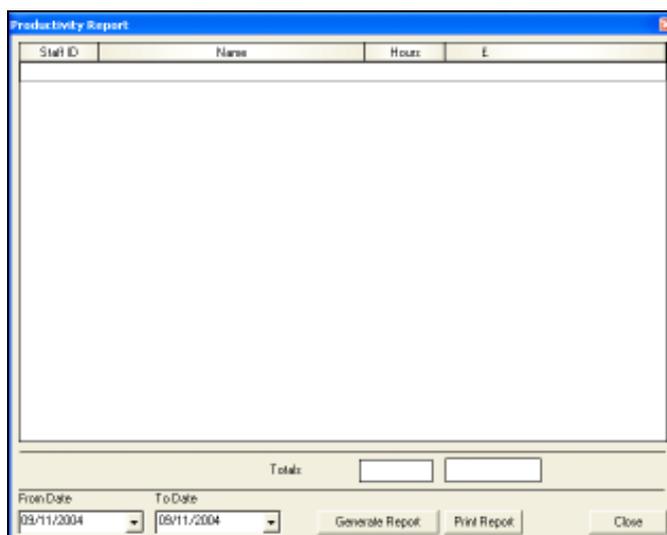
5.3 Displaying a Productivity Report

The Executive Overview enables you to produce a Productivity Report to give an indication of the value of appointments over a specified time period, where the value is the contribution to the business (excluding overheads).

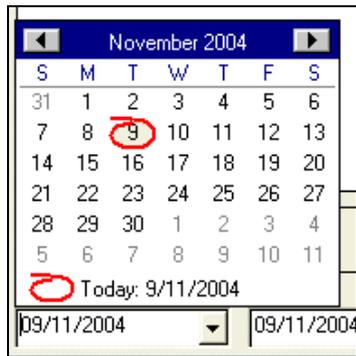
To display the Productivity Report:

- Select *Productivity* from the Executive menu.

The Productivity Report screen is displayed.



- Select the start date of the period for which you want to generate income figures by clicking on the down arrow on the **From Date** field to display a calendar.



Today's date is circled in red.

The left and right arrows on the month title bar allow you to scroll through the months. Click on the required date to select it.

3. Select the end date of the period in the **To Date** field in the same way.
4. Click on **Generate Report** to produce the Productivity Report for the specified period.

The following screen shows an example.

Productivity Report

Staff ID	Name	Hours	E
177	Robin Bennett	73.5	£10,671.09
178	James Guestford	40	£4,639.65
179	Ian Groves	49	£5,873.91
181	Shane Brennan	55	£6,613.18
183	Sam Jones	15.5	£805.95

Totals: 233 £28,603.78

From Date: 01/11/2005 To Date: 13/12/2005

Generate Report Print Report Close

The report shows, for each member of staff with work scheduled within the specified date range:

- number of scheduled productive hours
- contribution to the business likely to be generated over the period.

Totals of the number of productive hours and income are also displayed.

The contribution to the business is calculated as follows:

For a **fixed price job**, the value is calculated as the total estimated value of the job less the direct costs, divided by the total time booked for the job, then multiplied by the length of the appointment. That is:

$$\text{Value} = \frac{\text{total estimated value of job} - \text{direct costs}}{\text{total time booked for job}} \times \text{length of appointment}$$

Therefore, if you have a fixed price job with a value of £1000 and 16 hours booked in the diary as four half-day appointments (equivalent to two eight-hour days), and £200 hotel expenses, then each half-day appointment has a value of £200.

$$£200 = \frac{£1000 - £200}{16} \times 4$$

If problems occur with the job and an extra day is required, incurring additional travel expenses of £50, then the half-day appointment is now only worth £125.

$$£125 = \frac{£1000 - £250}{24} \times 4$$

For a **non-fixed price job**, the value of the extra day would not change as each day would be chargeable at the rate for the job.



As you invoice for your projects in Tracker, Resource Tracker picks up the real invoiced values and uses these rather than the estimated values in its calculations. The figures therefore tend to become firmer over time. So if you go back to appointments that have subsequently been invoiced, changed values may be displayed in the Productivity Report or in the tooltip displayed when you hover over an individual appointment.

5. If required, print the report by clicking on the **Print Report** button.
6. Close the Productivity Report screen by clicking on the **Close** button.