

Setting Up Labour Proficiency

Set Up

A specific labour rate may be set up for recording labour adjustments. Any hours booked to jobs that cannot be charged to the customer may be adjusted using this rate. The Labour Proficiency Report is printed to show a "Proficiency percentage" for each Engineer based on hours worked against hours charged/booked.

Labour Rates Descriptions

(System Management, Wholegoods/Workshop)

Add description for the rate to be used for adjustments, e.g. rate 12.

Labour Rate	Description	Pay Code
1	Normal Time	1
2	Overtime	2
3	Apprentice Normal	3
4	Apprentice Overtime	4
5	Contractors	
6		
7		
8		
9		
10		
11		
12	Adjustments	

Company Control File

(System Management, Company Control Files, Workshop tab, General)

Set the Labour Rate for Negative Hours.

Enter the labour rate to be used for recording negative hours (adjustments), e.g. 12.

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Company Control File Maintenance

Company: [Company] | General | Parts | **Workshop** | {WHOLEGD} | Plant Hire | Accounts | CRM

General - Amend

Draft Print Type: Plain Paper

Allow Workshop/Depot Transfer: Yes

Automatic Job Numbers: Yes

WSJ Instruction Print Format: Detailed Job Card

Batch Workshop Invoicing: Inv Date from WSJ Batch

Default WSJ Invoice Type: ...

Request Payment Method in WSJ: No

Labour Rate for Negative Hours: 12

Picking Note Print Sequence: ...

Print Weight on Picking Note: ...

Use Required Date for WSJ Part Allocation: ...

WSJ Quick Job Create: ...

Cust Cr/Stop Warning for Existing Job: ...

Rqd Date Buffer Days for WSJ Orders: ...

Picking Note Labels: ...

Labour Rate Lookup

Rate	Description
1	Normal Time
2	Overtime
3	Apprentice Normal
4	Apprentice Overtime
5	Contractors
12	Adjustments

Using the Negative Labour Rate (Workshop Control, Workshop Entry)

Where, for example, 8 hours labour has been booked to a job but only 7 hours can be invoiced to the customer, a negative line can be added using the rate set up.

LIVE

Job: 105746 | INV | Inv Type: 21 | Workshop Invoicing | Parts: 0.00

Cust: 1211 | Mr T.Hogg | 12/06/08 | Labour: 210.00

Header | Parts | **Labour** | Flat Rates | Story | Invoice | Instructions | Options | Print | Audit | Docs

Ra..	Labour Desc.	Date	Depot	Eng No	Name	C..	Hours	Value	Comment
1	NORMAL TIME	11/06/08	1	1	John Skill	Y	8.00	240.00	Workshop Invoic
12	Adjustments	11/06/08	1	1	John Skill	Y	-1.00	-30.00	Workshop Invoic

Labour Details

Rate	Description	Hours	Value	Recmnd	Cost	Margin	Mrg%
1.	NORMAL TIME	8.00	240.00	240.00	50.00	190.00	79.16
12.	Adjustments	-1.00	-30.00	0.00	0.00	-30.00	0.00

Mileage Description	Rate	Mileage
1. Van.	0.25	0

Distance to premises: 0

Job No. 105746 - Labour Line - Amending line 2 of 2

Date: 11/06/2008 | Comment: Workshop Invoic

Eng.: 1 | John Skill | Rate: 12 | **Adjustments**

Hours: -1.00 | Chargeable: Yes | Value: -30.00

Key Entry Fields

Date	Enter the date for the adjustment.
Eng	Enter the engineer number, the original engineer can be used or 999 Policy Adjustment.
Rate	Enter the labour rate, e.g. 12.
Hours	Enter the number of hours using a minus sign, e.g. -1.00
Value	Enter the value of labour to be adjusted using a minus sign, e.g. -30.00

Proficiency Report

(Workshop Control, Labour Reports)

The Proficiency Report can then be run to show the difference between “Hours Sold” i.e. total hours booked to the job and “Hours Taken”, which reflects any labour adjustments.

This is used to calculate a Proficiency percentage.

Options Tab

The screenshot shows a software dialog box titled "Workshop Proficiency Report Print Preview". It has three tabs: "Options", "Dates", and "Print". The "Options" tab is selected. The dialog contains several input fields and dropdown menus:

- Report Type:** A dropdown menu set to "Detail".
- Invoice Types From:** A dropdown menu set to "ALL" with a browse button (...).
- To:** An empty input field with a browse button (...).
- Engineer:** An empty input field with a browse button (...).
- Calculate Attended Hours By:** A dropdown menu set to "Entered Hours".
- Attended Hours:** A text input field containing "0.00".
- Labour Type:** A dropdown menu with "ALL" selected. The dropdown list is open, showing "ALL", "Productive", and "Non Productive".

At the bottom of the dialog, there are six buttons: "OK", "Cancel", "Save", "Batch", "Reset", and "Default".

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Dates Tab

Workshop Proficiency Report Print Preview

Options Dates Print

Job Status Required: Include Both Invoiced & W.I.P.

From Transaction Date: SMB 01-JUN ... SME 30-JUN ...

From Posting Date: SMB 01-JUN ... SME 30-JUN ...

From Invoice Date: ...

OK Cancel Save Batch Reset Default

Report based on 8.0 booked to job at rate 1 then -1.0 hour booked on rate 12

Company/Depot

Workshop Proficiency Report - Detail

Page 1

From Date : 01-Jun-08 to Date : 30-Jun-08
From Posting Date : 01-Jun-08 to Date : 30-Jun-08

Engineer	Sale Value	Cost	Gross Value	Profit%	Sold Hours	Taken Hours	Prof%	Util%
21 Workshop Invoicing (Pro)	210.00	50.00	160.00	76.19	7.00	8.00	87.50	
John Skill (0.00)	210.00	50.00	160.00	76.19	7.00	8.00	87.50	0.00
Depot 1 Sub-Total	210.00	50.00	160.00	76.19	7.00	8.00	87.50	0.00

7.0 Hours Sold but 8.0 Hours Taken gives Proficiency of 87.5%

Any positive hours added to workshop jobs using the labour rate for adjustments can increase the Proficiency over 100%. For example, 9.0 hours sold 8.0 hours taken works out as 112.5% proficiency.

An Utilisation percentage is also printed which compares the engineers "Attended Hours" to the Hours booked on workshop jobs. Attended hours may be set manually on the report criteria or recorded via either Time and Attendance or Keyfob Timesheets.

Workshop Proficiency Report Print Preview

Options | Dates | Print

Report Type: Detail

Invoice Types From: ALL To:

Engineer:

Calculate Attended Hours By: Entered Hours

Attended Hours: 0.00

Labour Type: ALL

Buttons: OK, Cancel, Save, Batch, Reset, Default

Report based on 8.50 Attended Hours for Engineer John Skill

Company/Depot		Workshop Proficiency Report - Detail							Page 1
		From Date :	01-Jun-08	to Date :	30-Jun-08				
		From Posting Date :	01-Jun-08	to Date :	30-Jun-08				
Engineer		Value		Gross Value	Profit%	Hours		Prof%	Util%
		Sale	Cost			Sold	Taken		
21 Workshop Invoicing (Pro)		210.00	50.00	160.00	76.19	7.00	8.00	82.35	
John Skill (8.50)		210.00	50.00	160.00	76.19	7.00	8.00	82.35	94.11
Depot 1 Sub-Total		210.00	50.00	160.00	76.19	7.00	8.00	82.35	94.11

8.0 hours "Taken" with 8.5 Attended Hours gives Utilisation of 94.11%

Where Attended Hours are in use this also affects the Proficiency percentage, which is then calculated as Hours Sold/Actual (Attended) Hours instead of Hours Sold/Hours Taken. In this example the Proficiency is 82.35%.