



# **Prohub Time & KPI Recorder**

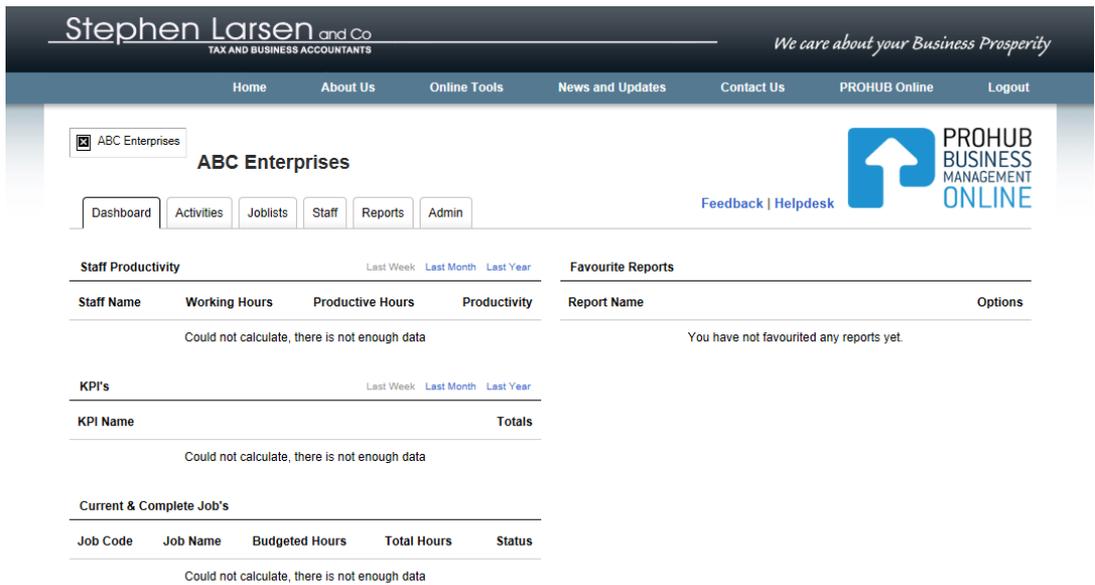
## **Setting up Guide**

**Version 1.1**

**For more information and other guides please visit [www.stephenlarsenandco.co.nz](http://www.stephenlarsenandco.co.nz)**

# Prohub Time & KPI Recorder - Setting up Guide

When you get your login and password your Dashboard will look like this.



Follow these Steps to set up the relevant details for your business.

## Step 1 – Business Information and your Company Logo

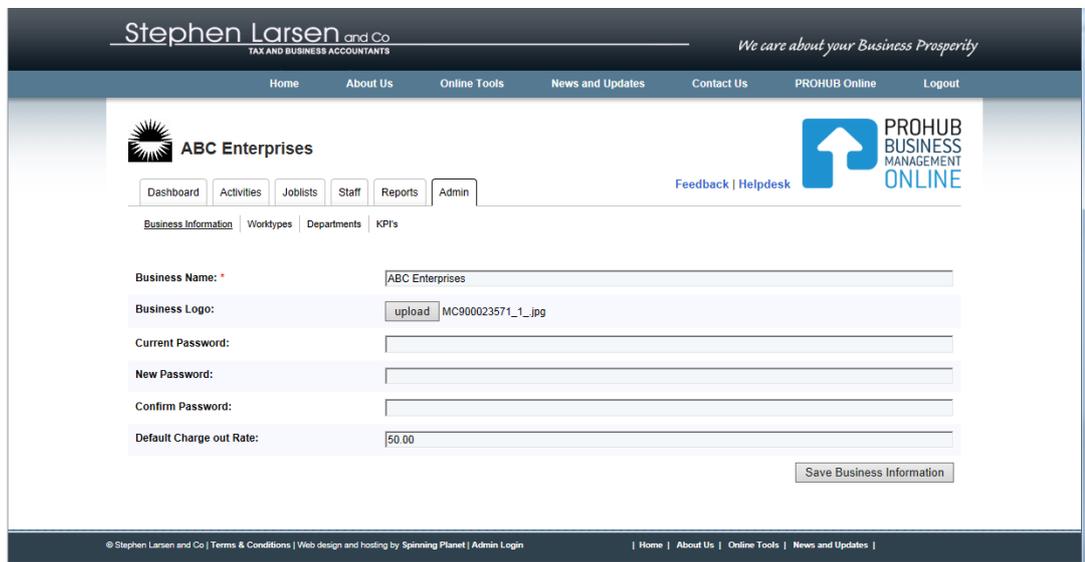
Click on the Admin Tab and this will show you the Business Information Tab.

Click on the Upload button to upload your business logo.

If you wish to change your password please enter your existing password and then your new Password and then confirm your new password.

Then Enter your business's default charge out rate. This can be \$0.00 if you wish

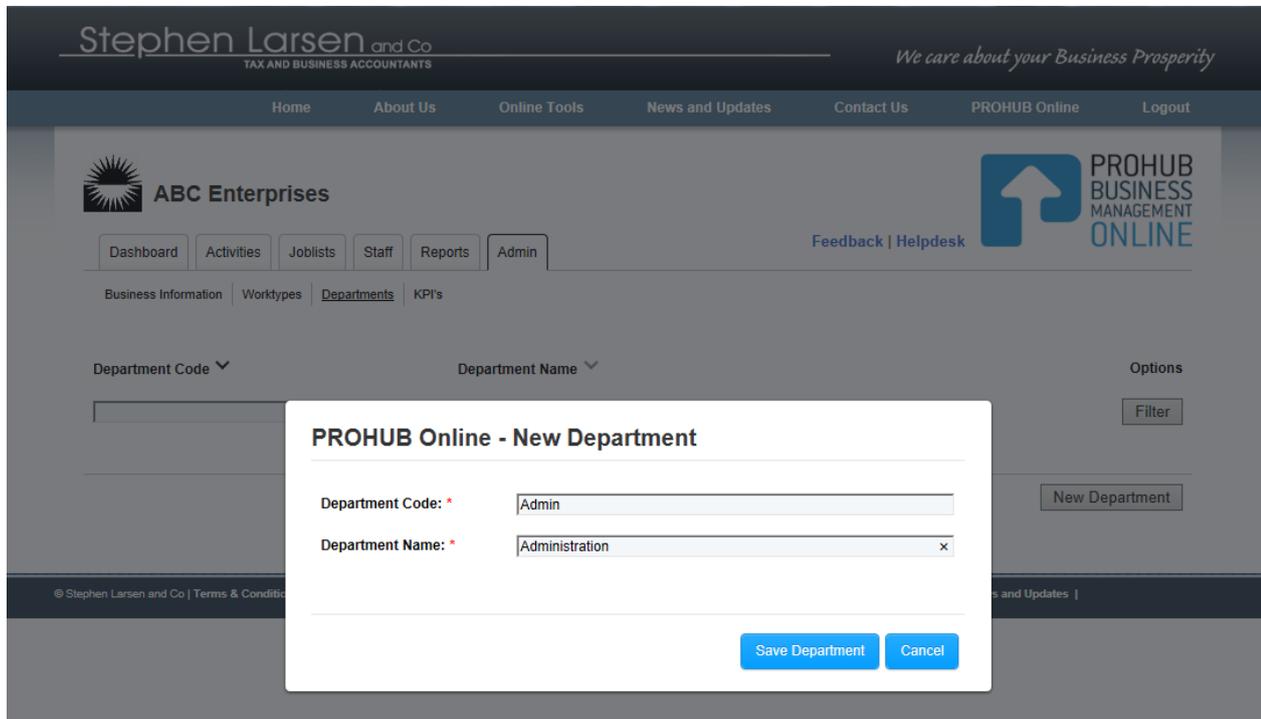
Then Click save Business Information.



## Step 3 – Departments

Now click on the Departments Tab and enter the Departments in your business. Common examples are Administration, Sales, Factory etc or whatever suits your business.

Click on the Add Department button and enter a Department Code and then enter the Department name. Then Click Save Department until you have all of your Departments entered.



The screenshot displays the PROHUB Online interface for 'ABC Enterprises'. The main navigation bar includes 'Home', 'About Us', 'Online Tools', 'News and Updates', 'Contact Us', 'PROHUB Online', and 'Logout'. The user is logged in as 'Admin'. The 'Departments' tab is selected in the sub-navigation. A modal window titled 'PROHUB Online - New Department' is open, containing two input fields: 'Department Code: \*' with the value 'Admin' and 'Department Name: \*' with the value 'Administration'. The modal also features 'Save Department' and 'Cancel' buttons. The background interface shows a 'New Department' button and a 'Filter' button.

## Step 2 – Work Types

Now click on the Work Types Tab and enter the Work Types that your business does. Common examples are Office, Sales, Management, Installation, Assembling, Finishing, Preparing etc or whatever suits your business. Every business has different work types and so you need to choose which ones suit you. You can add more work types later on if you wish.

Click on the New Worktype button and enter a Worktype Code and then enter the Worktype name. You then need to decide if this worktype is productive or not. If it is then tick the box. What we mean by whether it is productive or not is whether this worktype will be charged to your customers either directly or indirectly.

In most businesses any office, sales & marketing, administration, management type work would be unproductive so you would leave the Productive box unticked.

In businesses where staff are doing jobs for customers whether it be in your factory or out on site and they are working on a specific job or maybe manufacturing stock that will be sold to a customer then these activities are productive activities and the Productive box should be ticked.

You must also create the following Worktypes:

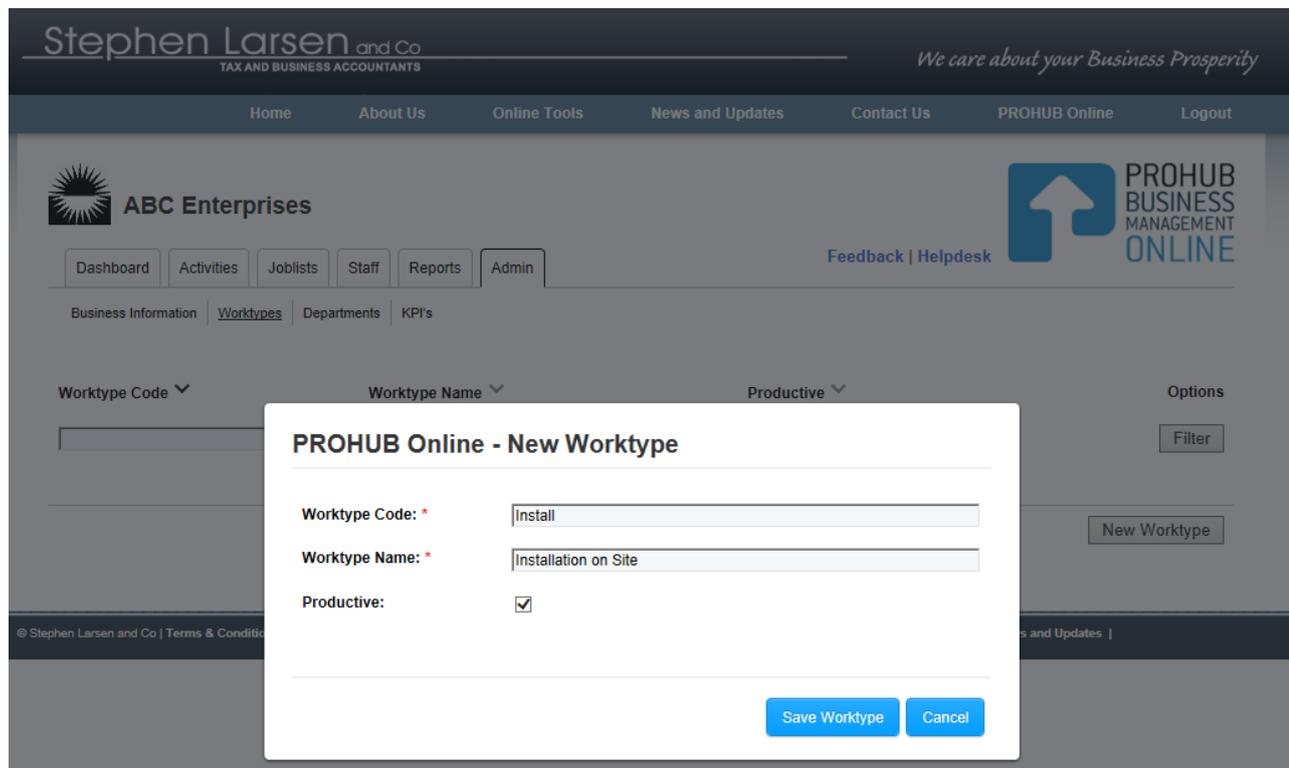
Annual Leave - Unproductive

Public Holiday - Unproductive

Sick Pay - Unproductive

Plus any other types of leave your staff may have.

Then Click Save Worktype and keep entering new worktypes until you have all of your worktypes entered. You can add more work types later on if you wish.



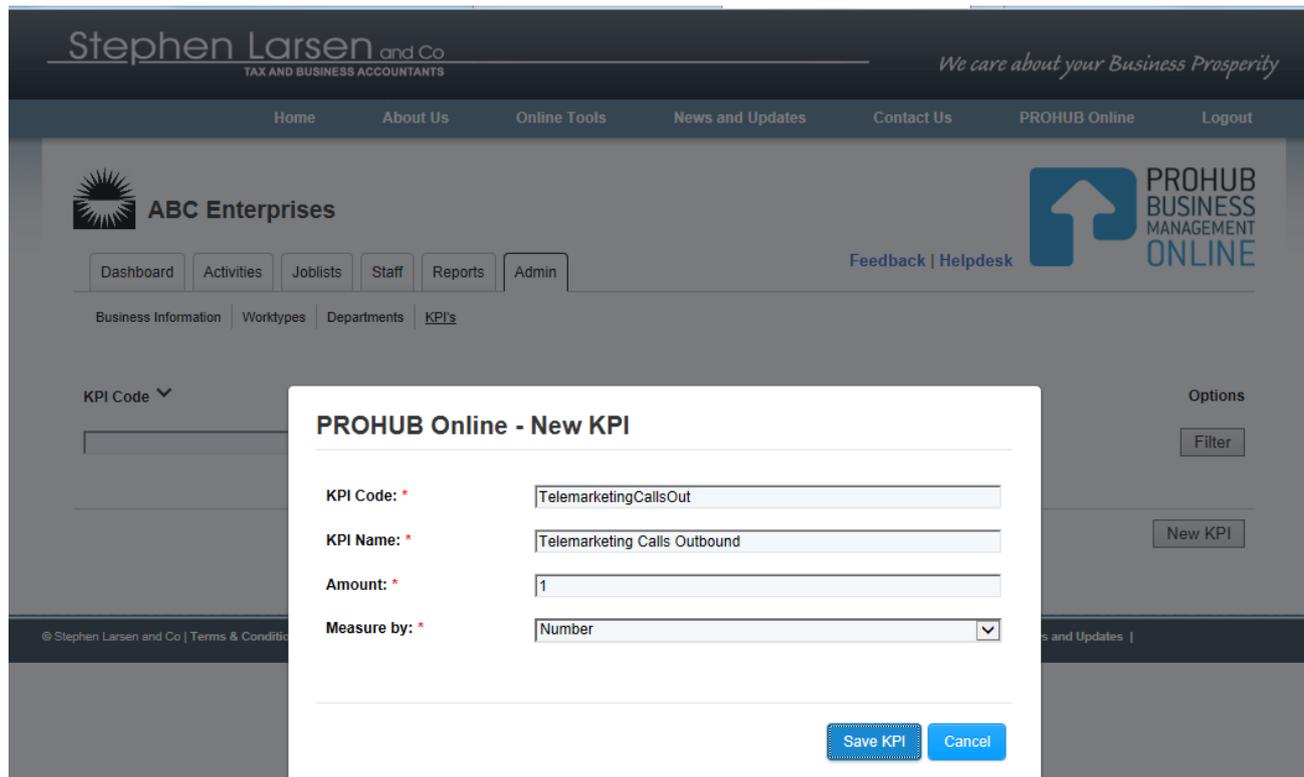
The screenshot displays the PROHUB Online web application interface. At the top, the header includes the logo for Stephen Larsen and Co (TAX AND BUSINESS ACCOUNTANTS) and the tagline 'We care about your Business Prosperity'. A navigation menu contains links for Home, About Us, Online Tools, News and Updates, Contact Us, PROHUB Online, and Logout. Below the navigation, the user is logged in as 'ABC Enterprises'. The main menu includes Dashboard, Activities, Joblists, Staff, Reports, and Admin. The 'Worktypes' tab is selected, showing a list of worktypes with columns for Worktype Code, Worktype Name, Productive, and Options. A modal window titled 'PROHUB Online - New Worktype' is open, allowing the user to add a new worktype. The form fields are: Worktype Code (with the value 'Install'), Worktype Name (with the value 'Installation on Site'), and Productive (with the checkbox checked). The modal includes 'Save Worktype' and 'Cancel' buttons.

## Step 4 – KPI's

Now click on the KPI Tab and enter the KPI (Key Performance Indicators) you want to monitor in your business. Every business will have different KPI's they want to measure but some common ones are Telemarketing calls, Quotes prepared, Brochures sent out, Web Visits answered etc etc.

Click on the New KPI button and enter a KPI code and then the KPI name and then the amount. In most cases this will be 1. Then enter the measure by which will normally be Number.

Then click Save KPI and keep entering new KPI's until you have all of your KPI's entered. You can add more work types later on if you wish.



The screenshot displays the PROHUB Online interface for ABC Enterprises. The main navigation bar includes links for Home, About Us, Online Tools, News and Updates, Contact Us, PROHUB Online, and Logout. The user is logged in as ABC Enterprises. The interface shows a sidebar with navigation options: Dashboard, Activities, Joblists, Staff, Reports, and Admin. The main content area is titled 'KPI's' and contains a 'New KPI' form. The form fields are as follows:

Field	Value
KPI Code *	TelemarketingCallsOut
KPI Name *	Telemarketing Calls Outbound
Amount *	1
Measure by *	Number

At the bottom of the form, there are two buttons: 'Save KPI' and 'Cancel'. The background interface also shows a 'Filter' button and a 'New KPI' button.

## Step 5 – Entering Team Members

Now you need to enter details for all of your Team Members. Click on the Staff tab and click on the New Staff button.

This will create a window where you need to enter the following data for each Team Member – see the notes below which explains each field.

**PROHUB Online - Edit Staff**

Staff Code: \* TedSmith

Staff Name: \* Ted Smith

Department: \* Factory

Employment Status: \* Full Time

Hourly Rate: \* Standard: 20.00 Overtime: 20.00

Effective Date: \* 01/01/2013

Working Hours Per Day: \* 8.00

Paid Days Per Year: \* 261.00

Productivity (%): \* 90.00

Statutory (in days): \* 10.00

Sick Days (in days): \* 5.00

Annual Leave (in days): \* 20.00

Overhead Cost Per Productive Hour: \* 30.00

Overhead Cost Per Working Hour: \* 28.00

Charge Out Rate: 60.00

Paid Hours Per Year: 2088

Total Annual Cost: 41760

Available Working Days Per Year: 226

Available Working Hours Per Year: 1808

Days at Work (%): 86.59

Productive Hours Per Day: 7.2

Productive Hours Per Year: 1627.2

Wage Cost Per Productive Hour: 25.66

Wage Cost Per Working Hour: 23.1

Wage & Overhead Cost Per Productive Hour: 55.66

Wage & Overhead Cost Per Working Hour: 51.1

Update Staff Cancel

**Staff Code** – create a code for your Team Member

**Staff Name** – the Team Members name

**Department** – choose the department that this Team Member spends most of his/her time in

**Employment Status** – choose whether the Team Member is Full time or Part Time

**Hourly Rate** – enter both the Team Members Standard rate and also the Overtime rate.

**Effective Date** – this is the date from which the Hourly Rate's apply

**Working Hours per Day** – enter the normal number of hours worked per day by this Team Member

**Paid Days per Year** – for a full time employee this will be 261 – this is calculated as being 365 days per year less 104 days for weekends. For a casual/ part-time employee enter 0 in this field.

**Productivity** – Enter a percentage for the Team Member – make an estimate of how much time this Team Member would spend doing Productive Work types. Remember that you need to include annual leave and holiday time in the calculation. So for a full time employee who works in the factory all day, their productivity would be between 80% and 90% per year over a whole year. For a part-time employee their productivity should be 100% as they are probably not going to be paid Holiday pay.

For an Administrative or Management or Office Team Member leave the productivity as zero.

**Statutorics (in days)** – for Full Time staff enter 10. For Part Time Staff enter 0

**Sick Days (in days)** – For Full Time Staff enter 5. For Part Time Staff enter 0

**Annual Leave (in days)** – For Full Time Staff enter 20 or whatever their entitlement is. For Part Time Staff enter 0

**Overhead Cost per Productive Hour** – get this figure from your Overhead Calculation Report – enter 0 for now until you have completed this report and come back and enter the correct figure later on.

**Overhead Cost per Working Hour** – get this figure from your Overhead Calculation Report – enter 0 for now until you have completed this report and come back and enter the correct figure later on.

**Charge Out Rate** – this is the particular Team Members charge out rate

On the right hand side of this window are fields which calculate automatically.

Below is the formula of each field:

Paid Hours per Year – Working Hours per Day multiplied by Paid Days per Year

Total Annual Cost – Paid Days per Year multiplied by Hourly Rate (Standard) multiplied by Working Hours per Day

Available Working Days per Year – Paid Days per Year less Statutorics less Sick Days less Annual Leave

Available Working Hours per Year - Available Working Days per Year multiplied by Working Hours per Day

Days at Work (%) - Available Working Days per Year divided by Paid Days per Year

Productive Hours per Day – Working Hours per day multiplied by Productivity %

Productive Hours per Year – Productive Hours per Day multiplied by Available Working Days per Year

Wage Cost per Productive Hour – Total Annual Cost divided by Productive Hours per Year

Wage Cost per Working Hour – Total Annual Cost divided by Available Working Hours per Year

Wage & Overhead Cost per Productive Hour – Wage Cost per Productive Hour plus Overhead Cost per Productive Hour

Wage & Overhead Cost per Working Hour – Wage Cost per Productive Hour plus Overhead Cost per Working Hour

If you wish to edit any of the Team Members then you simply click on the drop down button on the right hand side and choose edit to open the window.

Staff Code	Staff Name	Department	Options
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Filter"/>
BillJ	Bill Jones	Administration	
TedSmith	Ted Smith	Factory	<ul style="list-style-type: none"><li>Edit</li><li>Delete</li><li>Copy</li><li>Budgets</li><li>Wages</li><li>KPIs</li><li>Archive</li></ul>

## Step 6 – Entering Team Members Budgets

Now you can set each Team Member with Budgets as to how much of their time they should be spending on which work type.

In the Staff Tab Window click on the drop down box to the right of a Team Members name and choose Budgets.

In the window that appears click on the New Budget button and choose a Worktype that this Team Member will be working on and give them a percentage. This percentage means the percentage of time this Team Member will spend their time doing this Worktype.

Productive Budget (%)

**PROHUB Online - New Budget**

Worktype: Installation on Site

Budget (%):

Save Budget Cancel

Keep on adding more work types until you have the Team Member with all of their times equalling 100%

Remember that in normal circumstances Full time employees need to be given:

Statutories	3.8%
Sick Days	1.9%
Annual Leave	7.6%

Part Time Employees don't normally need to be given any of the above.

Below is an example of what a Full Time Employee's Budget may look like.

The screenshot shows the PROHUB Business Management Online interface for ABC Enterprises. The header includes the company name and tagline, navigation links, and a logo. The main content area features a navigation menu, a 'Current' tab, and a table with columns for Worktype, Productive, Budget (%), and Options. The table lists items like Woodworking - Factory, Annual Leave, Public Holiday, Sick Pay, and Painting - Factory with their respective productivity and budget values. A 'New Budget' button is located at the bottom right of the table.

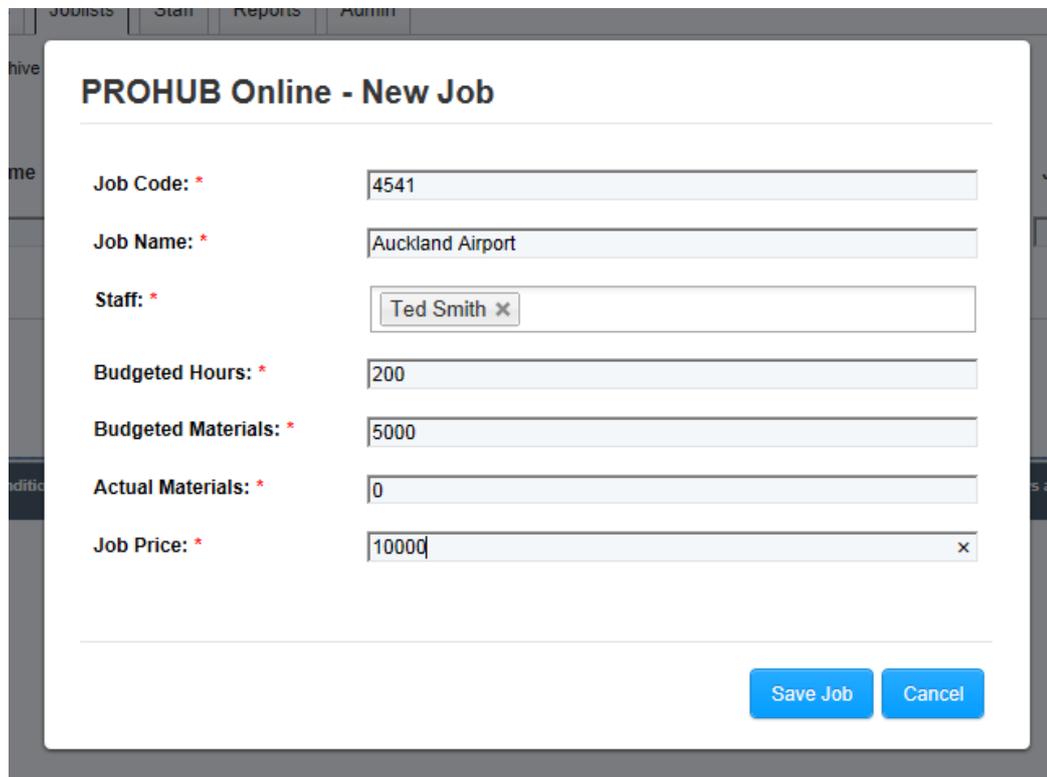
Worktype	Productive	Budget (%)	Options
Woodworking - Factory	Yes	50.00	--
Annual Leave	No	7.60	--
Public Holiday	No	3.80	--
Sick Pay	No	1.90	--
Painting - Factory	Yes	36.70	--

Keep on entering the details for all of your other Team Members following the instructions above.

## Step 7 – Entering Jobs

Now you need to enter Jobs you are going to do if you wish to use this feature.

Click on the Joblists Tab and then click on New Job to enter a Job



**PROHUB Online - New Job**

Job Code: \* 4541

Job Name: \* Auckland Airport

Staff: \* Ted Smith x

Budgeted Hours: \* 200

Budgeted Materials: \* 5000

Actual Materials: \* 0

Job Price: \* 10000 x

Save Job Cancel

Enter the following details

Job Code – enter the job code or number if you have one

Job Name – enter the name of the Job

Staff – select the Team Members that are working on this job

Budgeted Hours – how many hours you have budgeted to spend on this Job

Budgeted Materials – how much \$'s of materials you have budgeted for this job

Actual Materials – leave this as 0 for now and come back later when the job is finished and enter the actual materials amount later on.

Job Price – how much you are charging the customer for this job