

# **Perquest Client Analytics Help**

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## ***Client Analytics***

### **Welcome to the Client Analytics Help**

Client Analytics provide detailed payroll data on your company's earnings, employment activities, time off, sick time, and overtime.

The Client Analytics Help gives you information regarding:

- Navigating the Portal home page and each Analytic page
- Viewing and interpreting data for each Analytic
- Logging out of the Portal

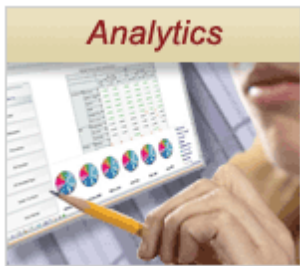
### **Why Analytics?**

Perquest Analytics provide easy-to-use graphical information that shows the health (or challenge areas) of your business at a glance. In addition, Analytics provide vital details that help you analyze business and industry trends so you can react to changes and challenges faster. All of which make your business more competitive and profitable.

### **Client Portal Home Page**

After you log on to the Perquest Client Portal, the Welcome page displays.

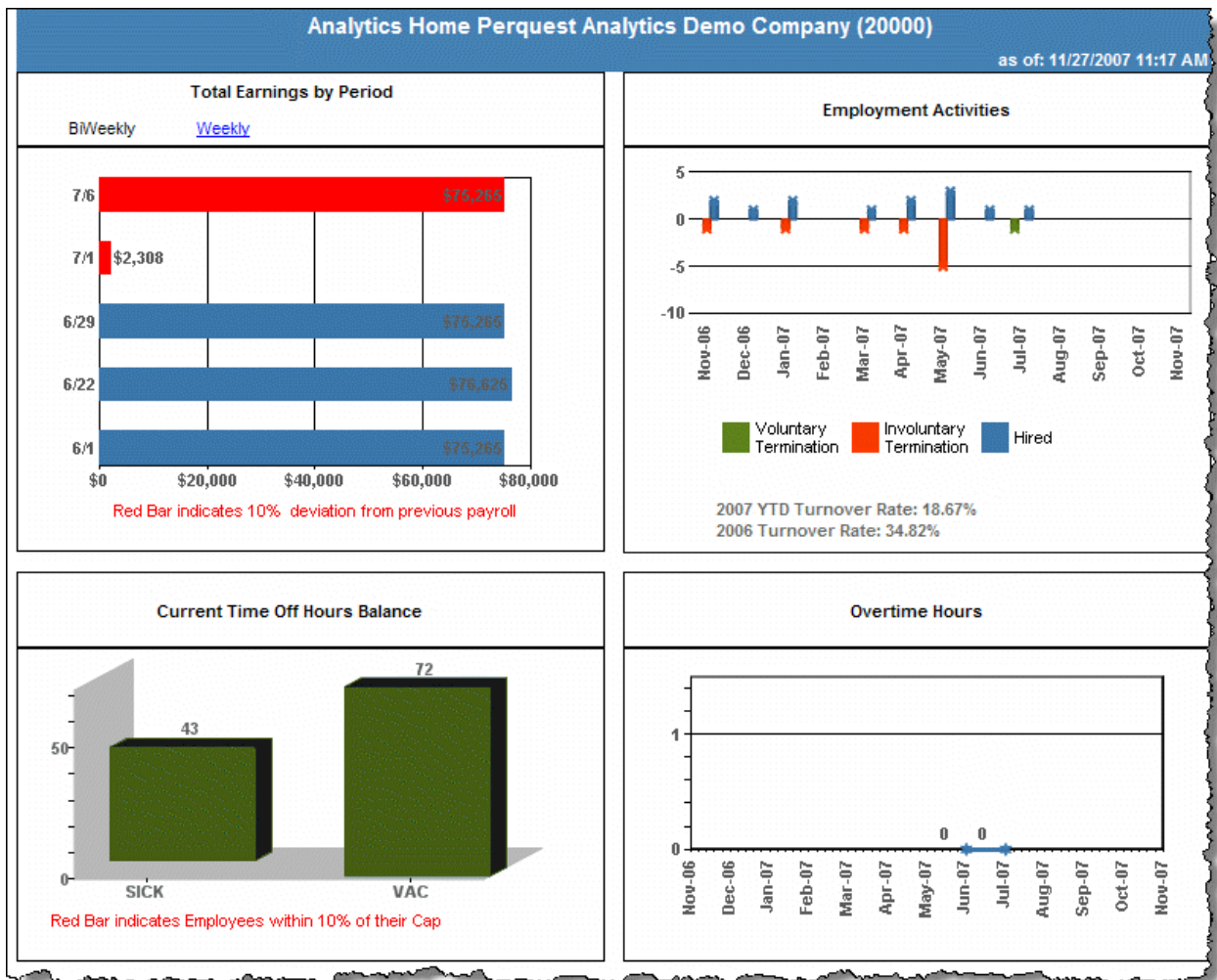
View the Analytics for your company by clicking the **Analytics** button.



### **Client Analytics Home Page**

After you start the Client Analytics for the first time, the home page defaults to the Analytics for the company that is linked to your Perquest Portal profile.

- Whenever the Hand icon appears (as you mouse over the Analytics), you can click to display additional details about that area of the graph
- Each Analytic page contains the title of the page and the date and time the page was created



Client Analytics Home page

### Selecting a Company

Use the **Select Company** drop-down menu to select your company.

**Select Company:**

### Scrolling

Scroll the Perquest Client Analytics Portal pages like any other Web-based interface.

- To scroll to the first page, click
- To scroll to the next page, click
- To scroll to the previous page, click
- To scroll to the last page, click

### Zooming

Zoom in and out by typing or selecting a percentage in the percentage field.

## Exporting Data

Export data in either Excel or PDF format by selecting the format from the **Select a format** drop-down menu. Then, click the **Export** button.

## Selecting Specific Analytics

Select specific Analytics by clicking on the graphs for each area. You can view information on the following:

- **Total Earnings by Period:** Click the pay period frequency (**Weekly**, **Bi-Weekly**, **Semi-Monthly**, or **Monthly**) to display specific information on the last six pay periods
- **Employment Activities:** Click the **Resigned**, **Terminated**, or **Hired** bars to display specific information on employment activities
- **Current Time Off Hours Balance:** Click the graph to display specific information on vacation and sick hours used for the pay period
- **Overtime Hours:** Click the month to display specific information about overtime hours, employee turnover, and time off for the pay period

For more information about using and interpreting Client Analytics, refer to the Help for each analytic:

[Total Earnings](#)

[Employment Activities](#)

[Current Time Off Hours](#)

[Overtime Hours](#)

## Portal Navigation

Navigate the Perquest Client Analytics Portal pages like any other Web-based interface.

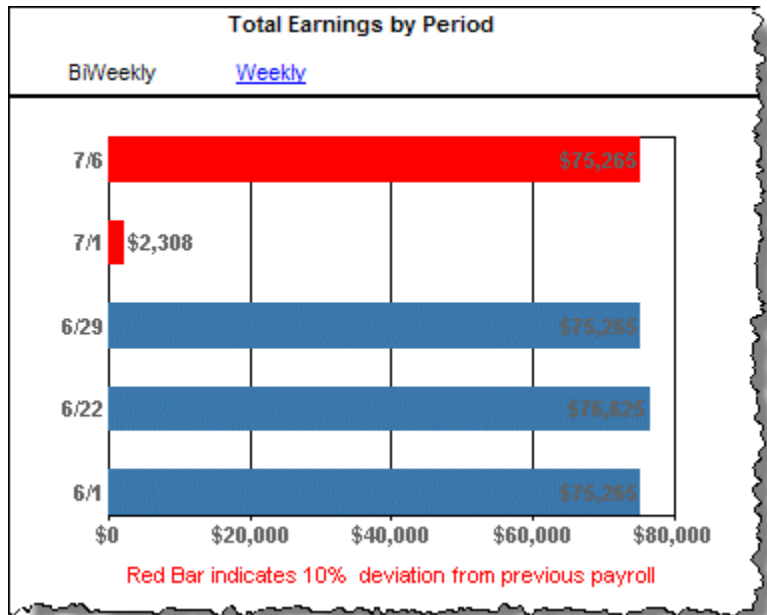
- To go back to the previous screen, click the Back button on your browser window
- To go forward to the next screen, click the Forward button on your browser window
- To go to the Client Analytics home page, click **Return to Main Dashboard**

## Portal Log Out

Click the **Log Out** button to exit the Client Analytics Portal.

## Total Earnings by Period Analytic

The **Total Earnings by Period** Analytic provides details on total earnings for selected payroll periods.



Whenever the Hand icon appears (as you mouse over the Analytics), you can click to display additional details about that area of the graph.

## Time Frequencies

If your company is set up with multiple pay period frequencies, the graph defaults to the frequency that contains the most employees.

### Time Frequencies Display

The time frequency choices: **Weekly**, **BiWeekly**, **Monthly**, **Semi-Monthly**, and **Monthly**. Select the appropriate display by clicking the time frequency at the top of the pane. The text color for a selected frequency displays in black. Deselected text frequencies display in underlined blue text. When you activate or deactivate a frequency, the color of the text toggles between blue and black.

## Graph Bars

The pay period bars display specific information about a selected pay period.

- Six pay periods display at all times for whatever time frequency is selected. For example, if you choose a time frequency of **Monthly**, the graph displays six months of payroll periods. If you choose **Semi-Monthly**, the graph displays six, two-week pay periods.
- Red bars in the graph indicate a ten percent negative or positive deviation from a three month payroll average. This lets you quickly access where dramatic changes to payroll occur.
- The graph provides both W-2 and 1099 data.

### Earnings Detail Report

Click a pay period bar in the graph to display earnings details about the selected pay period.



| Batch        | Dept | Employee          | Earnings Description | Net         | Hrs    | OT Hrs | OT \$\$  | Reg Hrs | Reg \$\$    | Total Earnings |
|--------------|------|-------------------|----------------------|-------------|--------|--------|----------|---------|-------------|----------------|
| ☐ SM2        |      |                   |                      | \$25,951.68 | 408.56 | 11.00  | \$302.23 | 397.56  | \$52,681.73 | \$52,983.96    |
|              | ☐ 01 |                   |                      | \$25,951.68 | 408.56 | 11.00  | \$302.23 | 397.56  | \$52,681.73 | \$52,983.96    |
|              |      | ☐ Miller, Barbara |                      | \$24,373.37 | 314.89 | 6.00   | \$124.61 | 308.89  | \$50,581.72 | \$50,706.33    |
|              |      |                   | xxxxxxxxxx           |             |        |        |          | 222.22  | \$49,381.73 |                |
|              |      |                   | OT                   |             |        | 6.00   | \$124.61 |         |             |                |
|              |      |                   | Salary               |             |        |        |          | 70.67   | \$978.47    |                |
|              |      |                   | Sick                 |             |        |        |          | 8.00    | \$110.76    |                |
|              |      |                   | Vac                  |             |        |        |          | 8.00    | \$110.76    |                |
|              |      | ☐ Skubic, Annie   |                      | \$1,578.31  | 93.67  | 5.00   | \$177.62 | 88.67   | \$2,100.01  | \$2,277.63     |
| <b>Total</b> |      |                   |                      | \$25,951.68 | 408.56 | 11.00  | \$302.23 | 397.56  | \$52,681.73 | \$52,983.96    |

### Earnings Details Report Descriptions

Descriptions of the fields in the Details Report Form follow.

- **Batch** - Expand **SM2** to display details about the batch for the selected pay period
- **Dept** - Expand to display details about the department for the selected pay period
- **Employee** - Expand the employee names to display details on specific employees for the selected pay period
- **Earnings Description** - The type of earnings for the pay period details displayed
- **Net** - The net pay for the pay period details displayed
- **Hrs** - The number of hours for the pay period details displayed
- **OT Hrs** - The number of overtime hours for the pay period details displayed
- **OT \$\$** - The amount the overtime hours add up to for the pay period details displayed
- **Reg Hrs** - The number of regular hours for the pay period details displayed
- **Reg \$** - The amount the regular hours add up to for the pay period details displayed
- **Total Earnings** - The total earnings for the pay period details displayed

### Portal Navigation

Navigate the Perquest Client Analytics Portal pages like any other Web-based interface.

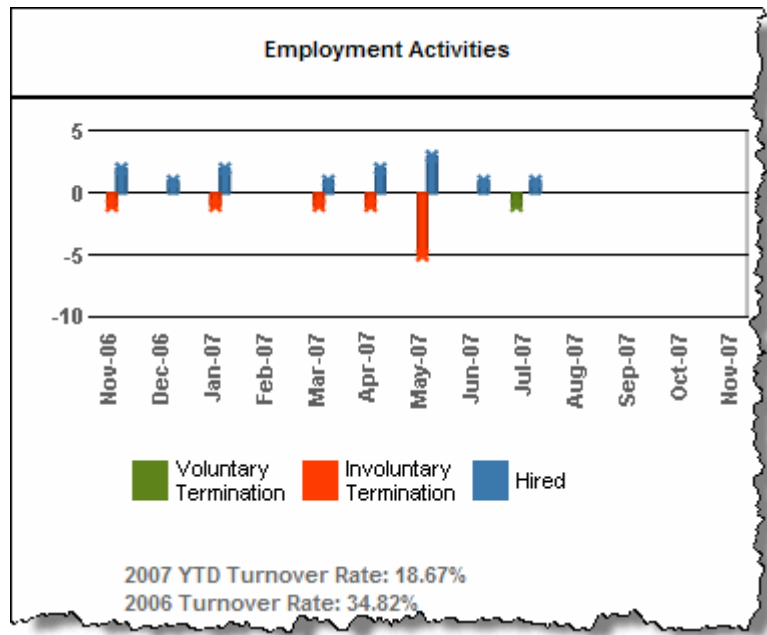
- To go back to the previous screen, click the Back button on your browser window.
- To go forward to the next screen, click the Forward button on your browser window.
- To go to the Client Analytics home page, click **Return to Main Dashboard**.

### Portal Log Out

Click the **Log Out** button to exit the Client Analytics Portal.

## Employment Activities Analytic

The Employment Activities Analytic provides details of employee activity for the year to date and the last two months of the previous year.



Whenever the Hand icon appears (as you mouse over the Analytics), you can click to display additional details about that area of the graph.

## Voluntary Termination

Click the green bars in the graph to display specific information on voluntary terminations.

- The graph displays data on W2 employees who have voluntarily left the company
- The graph displays the annual turnover rate for the current and two months of the previous year

## Involuntary Termination

Click the red bars in the graph to display specific information on involuntary terminations.

- The graph displays data on W2 employees who have involuntarily left the company
- The graph displays the annual turnover rate for the current and previous years

## Hired

Click the blue bars in the graph to display specific information on new hires.

- The graph displays data on W2 employees who have been hired by the company
- The Hired category comprises Hires and Re-Hires

## Calculating Employee Turnover

The employee turnover calculation is defined by Society for Human Resource Management (SHRM) and used by most major Human Resources software vendors. Turnover rate is important to follow because it helps you look at staffing trends over a specific period of time. Turnover is very costly when company and industry knowledge is factored in with training and recruiting costs. By identifying trends, your company can be proactive in determining why you might have a high turnover ratio and then determine what to do to decrease the turnover.

### Monthly Turnover Calculation

1. Count the number of employees that are active on the first day of the month.
2. Count the number of employees that are active on the last day of the month.
3. Add the counts together and divide by 2 to get the average number of employees for the month.
4. Divide the number of employee terminations for the month by the average number of employees for the month.

### Annual Turnover Calculation

Add all of the monthly rates together and divide by 12 to get an annual turnover rate

## Portal Navigation

Navigate the Perquest Client Analytics Portal pages like any other Web-based interface.

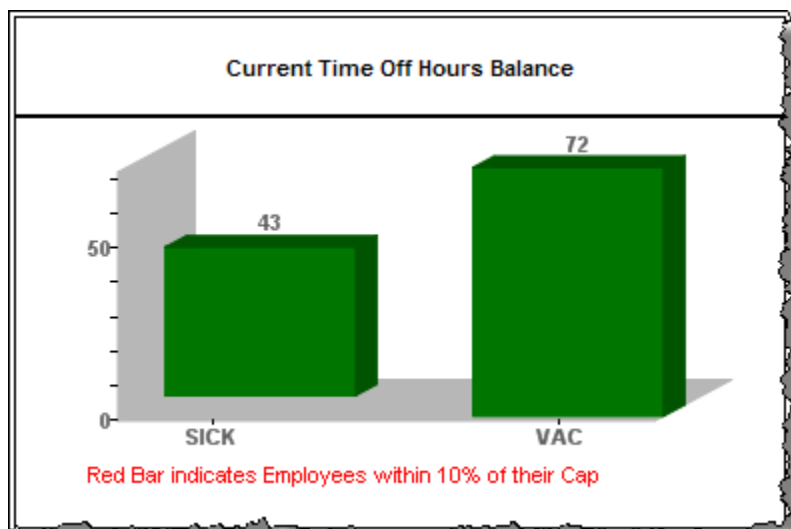
- To go back to the previous screen, click the Back button on your browser window
- To go forward to the next screen, click the Forward button on your browser window
- To go to the Client Analytics home page, click **Return to Main Dashboard**

## Portal Log Out

Click the **Log Out** button to exit the Client Analytics Portal.

### Current Time Off Hours Analytic

The **Current Time Off** Analytic provides information on sick time and vacation (or paid time off) hours.



Whenever the Hand icon appears (as you mouse over the Analytics), you can click to display additional details about that area of the graph.

## Current Time Off Hours - Sick

Click the graph to display year to date details on sick hours.

## Sick Time Off Details Report

Click the plus sign to the left of the appropriate department.

- The default display shows details by department
- Red data in the graph or reports indicate that an employee is within 10% of the vacation cap
- Expand the plus sign to display specific employee details by department

| YTD           |                |               |           |             |
|---------------|----------------|---------------|-----------|-------------|
| Time Off Type | Available \$\$ | Available Hrs | Used \$\$ | Earned \$\$ |
| SICK          | \$1,108.01     | 49            | \$300.23  | \$0.00      |
| VAC           | \$1,774.80     | 82            | \$300.23  | \$0.00      |
| Totals        | \$2,882.81     | 131           | \$600.46  | \$0.00      |

|                          | Employee Name   | Available \$\$ | Available Hrs | Used \$\$ | Used Hrs | Earned \$\$ | Earned Hrs | Accrual Cap Hrs | Messages |
|--------------------------|-----------------|----------------|---------------|-----------|----------|-------------|------------|-----------------|----------|
| <input type="checkbox"/> | Dept 01         | \$1,774.80     | 82            | \$300.23  | 16       |             |            |                 | 240      |
|                          | Miller, Barbara | \$235.38       | 17            | \$110.76  | 8        |             |            |                 | 120      |
|                          | Smith, Annie    | \$1,539.42     | 65            | \$189.47  | 8        |             |            |                 | 120      |

Sick Time Off Details Report

## Sick Time Off Details Report Descriptions


Descriptions of the fields in the Details Report Form follow.

- **Time Off Type** - Type of time off used
- **Available \$\$** - Amount of sick and vacation monies available for all departments
- **Available Hrs** - Amount of sick and vacation hours available for all departments
- **Used \$\$** - Amount of sick and vacation hours used for all departments
- **Earned \$\$** - Amount of sick and vacation monies earned for all departments
- **Dept <number>** - Department numbers for the company. Expand the plus sign to display specific employee details by department
- **Employee Name** - Name of employee in the department
- **Available \$\$** - Amount of sick and vacation monies available to each employee in the department
- **Available Hrs** - Amount of sick and vacation hours available to each employee in the department
- **Used \$\$** - Amount of sick and vacation monies used for each employee in the department

- **Used Hrs** - Amount of sick and vacation hours used for each employee in the department
- **Earned \$\$** - Amount of sick and vacation monies earned for each employee in the department
- **Earned Hrs** - Amount of sick and vacation monies earned for each employee in the department
- **Accrual Cap Hrs** - The cap on sick and vacation accrual hours for each employee in the department
- **Messages** - Indicate when a particular item on the report warrants attention or further action. For example, in the case of vacation (or paid time off), this field tells you when an employee is within 10% of the vacation cap so you can better manage staffing resources

### Sorting Sick Time Off Details

Click columns to sort the information.

- Sorting is available on all columns by clicking 
- Default sort is by Department in ascending order and Employee in alphabetical order (by last name and then first name)

### Current Time Off Hours - Vacation

Click the graph to display year to date details on vacation hours.

### Vacation Time Off Details

Click the plus sign to the left of the appropriate department.

- The default display shows details by department
- Red data in the graph or reports indicate that an employee is within 10% of the vacation cap
- Expand the plus sign to display specific employee details by department

| YTD                      |                   |                   |                  |                |             |                |               |                    |          |  |
|--------------------------|-------------------|-------------------|------------------|----------------|-------------|----------------|---------------|--------------------|----------|--|
| Time Off Type            | Available<br>\$\$ | Available<br>Hrs  | Used<br>\$\$     | Earned<br>\$\$ |             |                |               |                    |          |  |
| SICK                     | \$1,108.01        | 49                | \$300.23         | \$0.00         |             |                |               |                    |          |  |
| VAC                      | \$1,774.80        | 82                | \$300.23         | \$0.00         |             |                |               |                    |          |  |
| Totals                   | \$2,882.81        | 131               | \$600.46         | \$0.00         |             |                |               |                    |          |  |
|                          | Employee<br>Name  | Available<br>\$\$ | Available<br>Hrs | Used<br>\$\$   | Used<br>Hrs | Earned<br>\$\$ | Earned<br>Hrs | Accrual<br>Cap Hrs | Messages |  |
| <input type="checkbox"/> | Dept 01           | \$1,774.80        | 82               | \$300.23       | 16          |                |               |                    | 240      |  |
|                          | Miller, Barbara   | \$235.38          | 17               | \$110.76       | 8           |                |               |                    | 120      |  |
|                          | Smith, Annie      | \$1,539.42        | 65               | \$189.47       | 8           |                |               |                    | 120      |  |

Vacation Time Off Details Report

### Vacation Time Off Details Report Descriptions


Descriptions of the fields in the Details Report Form follow.

- **Time Off Type** - Type of time off used

- **Available \$\$** - Amount of sick and vacation monies available for all departments
- **Available Hrs** - Amount of sick and vacation hours available for all departments
- **Used \$\$** - Amount of sick and vacation hours used for all departments
- **Earned \$\$** - Amount of sick and vacation monies earned for all departments
- **Dept <number>** - Department numbers for the company. Expand the plus sign to display specific employee details by department
- **Employee Name** - Name of employee in the department
- **Available \$\$** - Amount of sick and vacation monies available to each employee in the department
- **Available Hrs** - Amount of sick and vacation hours available to each employee in the department
- **Used \$\$** - Amount of sick and vacation monies used for each employee in the department
- **Used Hrs** - Amount of sick and vacation hours used for each employee in the department
- **Earned \$\$** - Amount of sick and vacation monies earned for each employee in the department
- **Earned Hrs** - Amount of sick and vacation monies earned for each employee in the department
- **Accural Cap Hrs** - The cap on sick and vacation accrual hours for each employee in the department
- **Messages** - Messages about sick and vacation time

### Sorting Sick Time Off Details

Click columns to sort the information.

- Sorting is available on all columns by clicking 
- Default sort is by Department in ascending order and Employee in alphabetical order (by last name and then first name)

## Portal Navigation

Navigate the Perquest Client Analytics Portal pages like any other Web-based interface.

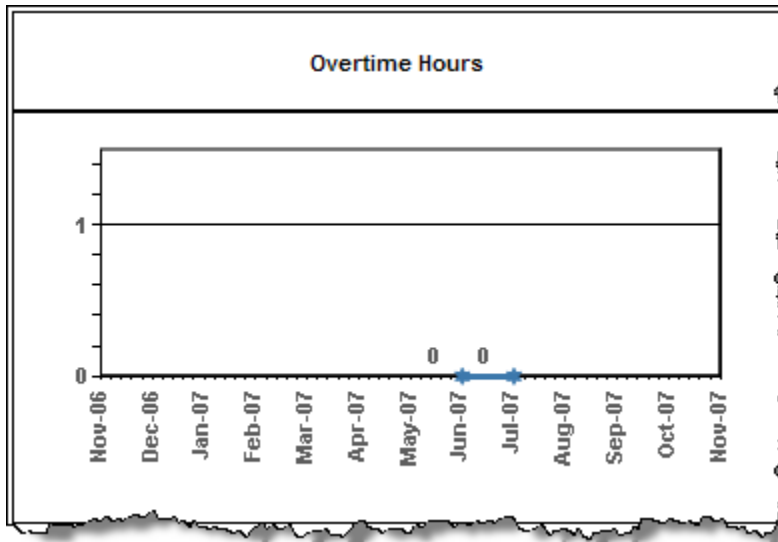
- To go back to the previous screen, click the Back button on your browser window.
- To go forward to the next screen, click the Forward button on your browser window.
- To go to the Client Analytics home page, click **Return to Main Dashboard**.

## Portal Log Out

Click the **Log Out** button to exit the Client Analytics Portal.

### Overtime Hours Analytic

This Analytic provides detail of overtime hours for the year to date and the last two months of the previous year. The Overtime Analytic is a trending graph that provides comparison information for your particular company type and environment. The graphs indicate which factors are resulting in overtime so you can better analyze and manage this aspect of your business.

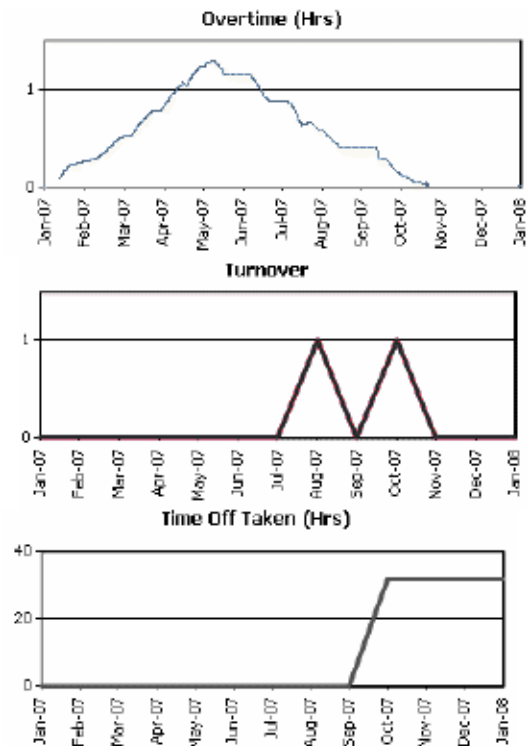


Whenever the Hand icon appears (as you mouse over the Analytics), you can click to display additional details about that area of the graph.

### Overtime Hours - Details

Click a month on the Analytic graph to display specific information on overtime hours for the month. The Overtime Details page appears.

|                 | Overtime \$     | Overtime Hrs | Notes |
|-----------------|-----------------|--------------|-------|
| <b>Dept 100</b> |                 |              |       |
| Anderson, Sarah | \$2,000         | 110          |       |
| Jones, Deb      | \$2,001         | 110          |       |
| Linc, Mary      | \$2,002         | 110          |       |
| Brighton, Pat   | \$2,003         | 80           |       |
| O'Dell, John    | \$2,004         | 80           |       |
| <b>Dept 100</b> | <b>\$10,010</b> | <b>430</b>   |       |
| <b>Dept 200</b> |                 |              |       |
| Price, Laura    | \$2,005         | 80           |       |
| Rivers, Lucy    | \$2,006         | 80           |       |
| Smith, Sam      | \$2,007         | 80           |       |
| Wilson, Chris   | \$2,008         | 100          |       |
| <b>Dept 200</b> | <b>\$8,026</b>  | <b>340</b>   |       |



### Expanding Overtime Details

The default display shows details by department.

- View employee details per department by clicking the plus sign to the left of the appropriate department

### **Sorting Overtime Details**

Click columns to sort the information.

- Sorting is available on all columns
- Default sort is by Department in ascending order and Employee in alphabetical order (by last name and then first name)

## **Portal Navigation**

Navigate the Perquest Client Analytics Portal pages like any other Web-based interface.

- To go back to the previous screen, click the Back button on your browser window
- To go forward to the next screen, click the Forward button on your browser window
- To go to the Client Analytics home page, click **Return to Main Dashboard**

## **Portal Log Out**

Click the **Log Out** button to exit the Client Analytics Portal.



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