

VOGSY Dashboards

Data Sources Reference

Understanding the data layer behind your Looker dashboards

Part 2 — Data Sources Reference

Introduction

This section describes all data sources (called **Explores** in Looker) available when you create or customize dashboards for VOGSY Dashboards. Each data source corresponds to a specific area of VOGSY and exposes a curated set of fields — **dimensions** (attributes you can group or filter by) and **measures** (aggregations such as sums, averages, and counts).

When you add a new visualization tile to a dashboard in Looker, you start by selecting one of these data sources. The fields listed in the left panel of the Looker editor come from the selected data source.

Key Concepts

Data Source (Explore) — A pre-configured starting point for querying your VOGSY data. Each data source defines which fields are available and how related tables are joined together.

Dimension — A field you can use to group, filter, or display data. Dimensions are typically text labels, dates, categories, or individual numeric values. They appear in the top section of the field picker.

Measure — An aggregation calculated across multiple rows, such as a sum, average, or count. Measures appear below the dimensions in the field picker.

Dimension Group — A date or time field that Looker automatically expands into multiple granularities (day, week, month, quarter, year). Pick the granularity that matches your reporting needs.

Department-Level Security — Most data sources apply automatic department-based filtering. Users only see data for the departments they are authorized to access.

Data Sources Overview

| Data Source | Primary Use |
|---------------------------------------|---|
| Report Projects | Project-level financials, budgets, and status |
| Report Deliverables | Deliverable-level tracking and cost analysis |
| Report Opportunities | Sales pipeline and revenue forecasting |
| Report Opportunity Bookings | Resource demand vs. bookings on opportunities |
| Report Time Entries | Individual time entries and utilization |
| Report Billability Employees | Monthly employee billability metrics |
| Report Billability Employees per Week | Weekly employee billability metrics |
| Report Planned Hours | Resource planning and capacity forecasting |
| Report Employees | Employee master data and rates |
| Report Employee Skills | Skills inventory per employee |

| Data Source | Primary Use |
|---|--|
| Report Customers | Customer master data |
| Report Project Invoices | Invoice aging and accounts receivable |
| Report Financial Transactions | General ledger and journal entries |
| Report Forward-Looking Invoicing | Invoicing forecast (next 12 months) |
| Report Revenue Actual and Forecast | Actual vs. forecasted revenue |
| Report Margin Forecast | Monthly margin analysis and forecast |
| Report Leave Budgets | Employee leave entitlements and balances |
| Report Leave Requests | Individual leave requests and approvals |
| Report Tasks | Task management and assignment tracking |

Report Data Sources – Detailed Reference

The Report data sources are pre-built, flattened views optimized for dashboard reporting. They are the recommended starting point for building dashboards.

Report Projects

Explore name: *report_projects*

A comprehensive view of all projects in VOGSY. Each row represents a single project with its financial summaries, hour tracking, and status information. This is the primary data source for project-level reporting.

Typical use cases: Project profitability analysis, budget tracking, project status overviews, order value reporting, margin analysis.

Date fields: Creation Date, Start Date, Finish Date, Last Status Change

Key Dimensions

| Field Name | Type | Description |
|-----------------------------|----------|--|
| Project Name | Text | Name of the project, links to VOGSY |
| Customer Name | Text | Customer organization name, links to VOGSY |
| Opportunity | Text | Related opportunity name |
| Project Managers | Text | Comma-separated list of project managers |
| Project Number | Number | Unique project number |
| Project Status | Text | Current project status |
| Department | Text | Department or company |
| Order Value | Currency | Total order value of the project |
| Discount / Surcharge % | Number | Applied discount or surcharge percentage |
| Weather Image | Text | Project health indicator |
| Labels (Project / Customer) | Text | Tags assigned to the project or customer |

Key Measures

| Field Name | Type | Description |
|--|-----------|--|
| Hours Calculated / Planned / Spent / Draft / To Plan | Sum / Avg | Hour tracking at various planning stages |
| Amount Actual Costs / Sales | Sum / Avg | Actual cost and sales amounts (currency) |
| Amount Calculated Cost / Sales / Margin | Sum / Avg | Calculated financial summaries |
| Amount Invoiced | Sum / Avg | Total invoiced amount |
| Amount To Be Invoiced | Sum / Avg | Remaining amount to invoice |
| Cost / Sales Amount (Calculated, Draft, Planned, Spent, To Plan) | Sum / Avg | Detailed cost and sales breakdowns per stage |
| Budget % Based on Cost / Sales Amounts | Sum / Avg | Budget consumption percentages |

| Field Name | Type | Description |
|---|-----------|--|
| Planned Billable (Current Month + 1..11 months) | Sum / Avg | Forward-looking planned billable hours |
| Provision on Cost / Revenue | Sum / Avg | Provisions applied |

Report Deliverables

Explore name: `report_deliverables`

Detailed view of all deliverables (work packages) within projects. Each row represents a single deliverable with its budget, hours, invoicing, and cost information.

Typical use cases: Deliverable budget tracking, invoicing progress, cost vs. sales analysis per deliverable, project breakdown analysis.

Date fields: Creation Date, Start Date, Finish Date, Order Date, Last Status Change

Key Dimensions

| Field Name | Type | Description |
|--|----------|---|
| Name | Text | Deliverable name |
| Project Name | Text | Parent project, links to VOGSY |
| Customer | Text | Customer organization |
| Opportunity Name | Text | Related opportunity |
| Deliverable Status | Text | Current status |
| Invoice Method | Text | How the deliverable is invoiced |
| Revenue Type | Text | Type of revenue |
| Department | Text | Responsible department |
| Hours Calculated / Planned / Spent / Draft / To Plan | Number | Hour tracking per stage |
| Cost / Sales Amount (per stage) | Currency | Financial breakdowns per planning stage |
| Completion Percentage | Number | Percentage complete |
| Labels (Project / Organization) | Text | Tags on the project or customer |
| Project Managers / Members | Text | People involved |

Key Measures

| Field Name | Type | Description |
|--|-----------|-----------------------------|
| Amount Invoiced / To Be Invoiced | Sum | Invoicing totals |
| Hours (Calculated, Planned, Spent, Draft, To Plan) | Sum | Aggregated hour metrics |
| Cost / Sales Amount per stage | Sum | Cost and sales aggregations |
| Budget % (Cost / Sales) | Sum | Budget consumption |
| Order Value | Sum / Avg | Total order value |

Report Opportunities

Explore name: *report_opportunities*

All opportunities (deals) in your sales pipeline. Each row represents a single opportunity with its revenue figures, probability, and pipeline stage.

Typical use cases: Pipeline analysis, revenue forecasting, win/loss reporting, sales performance by account manager.

Date fields: Creation Date, Expected Order / Start / Finish Date, Status Change Date

Key Dimensions

| Field Name | Type | Description |
|--------------------------------------|----------|---|
| Opportunity Name | Text | Name of the opportunity, links to VOGSY |
| Organization Name | Text | Customer organization, links to VOGSY |
| Account Manager | Text | Responsible account manager |
| Contact | Text | Primary contact person |
| Stage / Pipeline Name | Text | Pipeline stage and pipeline |
| Opportunity Type / Revenue Type | Text | Classifications |
| Revenue / Recurring Revenue | Currency | Expected revenue figures |
| Sales Probability | Number | Probability of winning (%) |
| Weighted Revenue / Recurring Revenue | Currency | Revenue weighted by probability |
| Won / Active | Yes/No | Status flags |
| Market Segment / Source | Text | Segmentation and lead source |
| Labels (Opportunity / Organization) | Text | Tags |

Key Measures

| Field Name | Type | Description |
|--------------------------------------|-----------|-----------------------------|
| Revenue / Recurring Revenue | Sum / Avg | Revenue totals |
| Weighted Revenue / Recurring Revenue | Sum / Avg | Probability-weighted totals |
| Sales Probability | Average | Average win probability |

Report Opportunity Bookings

Explore name: *report_opportunity_bookings*

Tracks resource demand and bookings against opportunities. Each row represents a resource demand line showing FTE demanded vs. booked.

Typical use cases: Resource demand forecasting, capacity planning, booking gap analysis.

Date fields: Expected Start / Finish Date

Key Dimensions

| Field Name | Type | Description |
|--|--------|-----------------------------|
| Opportunity Name / Organization Name | Text | Opportunity and customer |
| Account Manager / Contact | Text | Key people |
| Activity | Text | Required activity or role |
| Demand / Booked / Not Booked FTE and Hours | Number | Resource metrics |
| Revenue / Sales Probability / Stage | Mixed | Pipeline and financial info |
| Skills / Seniorities | Text | Required competencies |
| Labels (Opportunity / Organization) | Text | Tags |

Key Measures

| Field Name | Type | Description |
|----------------------------------|-----------|------------------|
| Demand / Booked / Not Booked FTE | Sum / Avg | FTE aggregations |
| Revenue / Weighted Revenue | Sum / Avg | Financial totals |

Report Time Entries

Explore name: `report_time_entries`

Individual time entries logged by employees. Each row is a single time entry with hours, rates, and categorization. The most granular time tracking data source.

Typical use cases: Employee utilization reports, time analysis by project/customer, cost and revenue rate analysis, invoicing reconciliation.

Date fields: Date (entry date)

Key Dimensions

| Field Name | Type | Description |
|--|----------|---------------------------------------|
| Employee / Customer / Project / Opportunity | Text | Core entity references, link to VOGSY |
| Deliverable / Activity / Task | Text | Work categorization |
| Hours / Billable Hours | Number | Time tracked |
| Cost Rate / Sales Rate / Sales Rate on Invoice | Currency | Rates applied |
| Invoice Number / Time Entry Status | Text | Invoicing info |
| Revenue Type / Invoicing Method | Text | Financial classification |
| Seniority / Skill Level | Text | Employee classification |
| Employee Tags / Labels (Project, Customer) | Text | Tags |

| Field Name | Type | Description |
|------------------|--------|------------------|
| Project Managers | Text | Project managers |
| Week / Year | Number | Time period |

Key Measures

| Field Name | Type | Description |
|--|-----------|------------------------|
| Hours / Billable Hours | Sum / Avg | Hour totals |
| Cost Rate / Sales Rate / Sales Rate on Invoice | Sum / Avg | Rate totals |
| Sales Value (Hours / Billable Hours) | Sum | Calculated sales value |

Report Billability Employees

Explore name: `report_billability_employees`

Monthly billability metrics per employee. Each row is one employee for one month, including actual vs. target billable hours.

Typical use cases: Employee billability tracking, utilization target monitoring, capacity analysis by department.

Date fields: Period Date (year-month)

Key Dimensions

| Field Name | Type | Description |
|--|----------|----------------------|
| Employee Name / Department | Text | Employee identity |
| Year / Month | Number | Time period |
| Actual Billable Hours / Actual Hours / Working Hours | Number | Hour breakdowns |
| Billability Target / Target Billable Hours | Number | Targets |
| Non-Billable and Time Off Hours | Number | Non-productive hours |
| Amount Actual Billability / Planned | Currency | Financial amounts |

Key Measures

| Field Name | Type | Description |
|--------------------|---------|-----------------------|
| All hour fields | Sum | Hour aggregations |
| Billability Target | Average | Average target |
| Available Hours | Sum | Total available hours |

Report Billability Employees per Week

Explore name: *report_billability_employees_per_week*

Weekly billability breakdown per employee, showing working hours, billable, non-billable, and time off hours per week.

Typical use cases: Weekly utilization tracking, time tracking compliance, workload analysis.

Date fields: Week Start Date

Key Dimensions

| Field Name | Type | Description |
|--|--------|--------------------------|
| Employee / Department | Text | Employee identity |
| Year / Week | Number | Time period |
| Working / Billable / Non-Billable / Time Off Hours | Number | Hour categories |
| Total Tracked Hours | Number | Sum of all tracked hours |

Key Measures

| Field Name | Type | Description |
|---|------------|-----------------------------|
| All hour fields | Sum | Hour aggregations |
| Hours to Track / Absolute Hours Deviation | Calculated | Tracking compliance metrics |

Report Planned Hours

Explore name: *report_planned_hours*

Resource planning data showing planned hours per employee, project, and time period. Each row is a planned allocation for a specific week.

Typical use cases: Resource planning overviews, capacity forecasting, planned vs. actual analysis.

Date fields: Date (planning date)

Key Dimensions

| Field Name | Type | Description |
|--|----------|--------------------------------|
| Employee / Customer / Project / Opportunity | Text | Core references, link to VOGSY |
| Deliverable / Activity | Text | Work categorization |
| Planned Hours | Number | Planned hours |
| Cost Rate / Sales Rate / Sales Rate Employee | Currency | Rates |
| Sales Probability / Opportunity Stage / Project Status | Mixed | Pipeline context |
| Revenue Type / Invoicing Method | Text | Financial classification |

| Field Name | Type | Description |
|--|--------|-----------------|
| Labels (Project / Customer / Employee) | Text | Tags |
| Project Managers | Text | Managers |
| Week / Year | Number | Planning period |

Key Measures

| Field Name | Type | Description |
|--|-----------|------------------------|
| Planned Hours / Cost Rate / Sales Rate | Sum / Avg | Planning totals |
| Sales Probability | Average | Average probability |
| Latest / First Planned Date | Date | Date range of planning |

Report Employees

Explore name: `report_employees`

Master data for all employees in VOGSY. Each row is one employee with personal details, rates, working hours, and role assignments.

Typical use cases: Employee directory, cost rate analysis, FTE reporting, role and skills overview.

Date fields: Start / Finish dates for billability, department, rates, and working hours

Key Dimensions

| Field Name | Type | Description |
|--|----------|--|
| First Name / Last Name / Email | Text | Employee identity |
| Manager / Manager Email | Text | Reporting line |
| Company or Department / Seniority | Text | Organizational classification |
| User Type | Text | VOGSY user type (No user, Lite, Full, Super) |
| Cost Rate / Internal Cost Rate / Sales Rate | Currency | Rates |
| Working Hours (per weekday) / Working Hours Week | Number | Contracted hours |
| FTE / Is Active / Is Project Manager | Mixed | Status flags |
| Roles (List) / Labels / Activities / Absence Types | Text | Assignments |
| Billability Percentage | Number | Billability target |

Key Measures

| Field Name | Type | Description |
|--------------------------|-----------|---------------------|
| Working Hours Week / FTE | Sum / Avg | Aggregations |
| Count | Count | Number of employees |

Report Employee Skills

Explore name: `report_employee_skills`

Skills and competencies assigned to employees. Each row is one skill for one employee, including the skill level.

Typical use cases: Skills inventory, resource matching for opportunities, competency gap analysis.

Date fields: None

Key Dimensions

| Field Name | Type | Description |
|---|------|----------------------------|
| First Name / Last Name / Employee Email | Text | Employee identity |
| Department or Company | Text | Organizational unit |
| Skill / Skill Level | Text | Competency and proficiency |
| User Type / Roles | Text | Access and role info |

Key Measures

| Field Name | Type | Description |
|------------|-------|-------------------------|
| Count | Count | Number of skill records |

Report Customers

Explore name: `report_customers`

Master data for all customer organizations. Each row is a customer with contact details, address, and financial information.

Typical use cases: Customer directory, account management overviews, customer segmentation.

Date fields: Creation Date

Key Dimensions

| Field Name | Type | Description |
|---------------------------------------|------|-----------------------------------|
| Name / Account Manager / Contact Name | Text | Customer identity, links to VOGSY |
| Industry / Source | Text | Classification and lead source |
| Email / Phone / Website | Text | Contact details |
| Invoice Address fields | Text | Full invoicing address |
| IBAN / BIC / VAT Number | Text | Financial identifiers |
| Labels (Customer) | Text | Tags |

Key Measures

| Field Name | Type | Description |
|------------|-------|---------------------|
| Count | Count | Number of customers |

Report Project Invoices

Explore name: `report_project_invoices`

All project invoices with amounts, aging, and payment status. Essential for accounts receivable and cash flow reporting.

Typical use cases: Accounts receivable analysis, invoice aging reports, outstanding balance tracking, payment follow-up.

Date fields: Invoice Date, Draft Date, Due Date, Approval Date, Latest Reminder Date

Key Dimensions

| Field Name | Type | Description |
|--|----------|---------------------------------|
| Customer Name / Project Name | Text | Core references, links to VOGSY |
| Invoice Number / Approved By | Text | Invoice details |
| Invoice Amount / Net Amount / VAT Amount | Currency | Financial details |
| Outstanding Balance / Amount | Currency | Unpaid amounts |
| Days Expired / Outstanding / Overdue | Number | Aging metrics |
| Age Category | Text | Aging bucket classification |
| Number of Reminders | Number | Payment reminders sent |
| Labels (Project / Customer / Employee) | Text | Tags |

Key Measures

| Field Name | Type | Description |
|--|-----------|----------------------------|
| Invoice / Net / VAT Amount | Sum / Avg | Financial totals |
| Outstanding Balance / Amount | Sum / Avg | Unpaid totals |
| Aging buckets (< 30d, 31-60d, 61-90d, → 90d) | Sum / Avg | Amounts per aging category |

Report Financial Transactions

Explore name: `report_financial_transactions`

General ledger and journal entry transactions. Each row is a single financial transaction with debit/credit amounts and ledger account details.

Typical use cases: Financial reconciliation, ledger analysis, cost center reporting, revenue type breakdowns.

Date fields: Date, Period Date

Key Dimensions

| Field Name | Type | Description |
|---|----------|------------------------|
| Project Name / Number / Customer Name | Text | Entity references |
| Ledger Account Name / Number | Text | General ledger account |
| Journal / Book Entry Number | Text | Entry reference |
| Transaction Description | Text | Description |
| Amount Debit / Credit (base and local currency) | Currency | Transaction amounts |
| Period / Year / Revenue Type / Cost Center | Mixed | Classification |
| Labels (Project / Customer / Supplier) | Text | Tags |

Key Measures

| Field Name | Type | Description |
|---|------|-------------------------|
| Amount Debit / Credit (base and local currency) | Sum | Debit and credit totals |

Report Forward-Looking Invoicing

Explore name: *report_forward_looking_invoicing*

Invoicing forecast for the coming 12 months. Each row shows a deliverable with expected invoicing amounts per month going forward.

Typical use cases: Cash flow forecasting, invoicing pipeline, revenue planning, monthly billing projections.

Date fields: Start Date, Finish Date

Key Dimensions

| Field Name | Type | Description |
|--|----------|--|
| Project Name / Number / Customer | Text | Project and customer |
| Deliverable Name | Text | Related deliverable |
| Amount Invoiced / Order Value | Currency | Current financials |
| Amount To Be Invoiced (Current Month + 1..11 months) | Currency | Monthly projections for the next 12 months |
| Invoice Method / Revenue Type | Text | Invoicing configuration |
| Labels (Project / Customer) / Project Managers | Text | Tags and managers |

Key Measures

| Field Name | Type | Description |
|---------------------------------|------|--------------------------------|
| Amount Invoiced / Order Value | Sum | Totals |
| Amount To Be Invoiced per Month | Sum | Monthly projections aggregated |

Report Revenue Actual and Forecast

Explore name: `report_revenue_actual_and_forecast`

Combined actual and forecasted revenue per project per month. Distinguishes between pipeline forecasts and order book forecasts.

Typical use cases: Revenue forecasting, actual vs. forecast comparisons, pipeline revenue analysis, order book reporting.

Date fields: Period Date, Start Date, Finish Date

Key Dimensions

| Field Name | Type | Description |
|--|----------|------------------------|
| Project Name / Number / Customer Name | Text | Entity references |
| Opportunity Name / Stage | Text | Pipeline context |
| Actual Revenue / Total Actual Revenue / Forecasted Revenue | Currency | Revenue figures |
| Sales Probability / Revenue Type / Project Status | Mixed | Classifications |
| Company Department / Project Managers | Text | Organizational context |
| Month / Year | Number | Time period |

Key Measures

| Field Name | Type | Description |
|---------------------------------------|-----------|---|
| Actual Revenue / Total Actual Revenue | Sum / Avg | Realized revenue |
| Forecasted Revenue | Sum / Avg | Forecast totals |
| Forecasted Revenue (Pipeline) | Sum | Forecast where opportunity stage is present |
| Forecasted Revenue (Order Book) | Sum | Forecast where opportunity stage is empty |

Report Margin Forecast

Explore name: `report_margin_forecast`

Monthly margin forecast per project showing actual and forecasted costs, revenue, and margins per deliverable.

Typical use cases: Margin analysis, project profitability forecasting, cost vs. revenue tracking over time.

Date fields: Period Date

Key Dimensions

| Field Name | Type | Description |
|--|----------|-------------------|
| Project Name / Number / Customer Name | Text | Entity references |
| Deliverable | Text | Deliverable name |
| Actual Cost / Revenue / Margin Amount / Margin % | Mixed | Realized figures |
| Forecasted Cost / Revenue / Margin | Currency | Projected figures |
| Revenue Type / Company Department | Text | Classifications |
| Labels (Project) / Project Managers | Text | Tags and managers |
| Month / Year | Number | Period |

Key Measures

| Field Name | Type | Description |
|------------------------------------|-----------|-----------------|
| Actual Cost / Revenue / Margin | Sum / Avg | Realized totals |
| Forecasted Cost / Revenue / Margin | Sum / Avg | Forecast totals |

Report Leave Budgets

Explore name: `report_leave_budgets`

Leave (absence) budgets per employee per absence type, showing entitlements, taken, planned, and remaining balances.

Typical use cases: Leave balance overviews, absence planning, HR reporting.

Date fields: Start Date, Finish Date

Key Dimensions

| Field Name | Type | Description |
|--|--------|------------------------------|
| Employee Name / Email | Text | Employee identity |
| Absence Type / Department Name | Text | Leave and org classification |
| Budget / Leave Taken / Planned / Pending / Remaining | Number | Leave hours |
| Description / Note | Text | Additional information |

Key Measures

| Field Name | Type | Description |
|--|------|-------------------|
| Budget / Leave Taken / Planned / Pending / Remaining | Sum | Leave hour totals |

Report Leave Requests

Explore name: `report_leave_requests`

Individual leave requests submitted by employees with status, dates, approver, and hours requested.

Typical use cases: Leave request management, approval tracking, absence reporting.

Date fields: Start Date, Finish Date, Submit Date, Approval Date, Reject Date

Key Dimensions

| Field Name | Type | Description |
|--|-------|-----------------|
| Employee Name / Approver Name | Text | People involved |
| Absence Type / Department Name | Text | Classification |
| Leave Requested Hours / Status | Mixed | Request details |
| Leave Budget Description / Description | Text | Context |

Key Measures

| Field Name | Type | Description |
|-----------------------|-------|-----------------------|
| Leave Requested Hours | Sum | Total requested hours |
| Count | Count | Number of requests |

Report Tasks

Explore name: `report_tasks`

Tasks created within VOGSY, linked to projects, opportunities, or organizations.

Typical use cases: Task management overviews, workload distribution, deadline tracking.

Date fields: Creation Date, Start Date, Due Date

Key Dimensions

| Field Name | Type | Description |
|--|------|---|
| Title / Description | Text | Task content |
| Person Name / Creator | Text | Assignment and creation, links to VOGSY |
| Organization / Project Name / Opportunity Name | Text | Entity context, links to VOGSY |
| Task Status / Entity | Text | Status and type |
| Assignees / Activity Names | Text | Additional metadata |

Key Measures

| Field Name | Type | Description |
|------------|-------|-----------------|
| Count | Count | Number of tasks |

Entity-Level Data Sources

In addition to the Report data sources, Looker provides access to entity-level data sources. These expose raw VOGSY data tables with full joins to related entities. They offer maximum flexibility but require more knowledge of the data model. For most dashboard needs, the Report data sources are sufficient.

Use entity-level data sources when you need fields or relationships not available in the Report data sources.

Project

Explore name: project

Raw project entity data with joins to department information. For most reporting needs, the Report Projects data source is more convenient as it includes pre-calculated financial summaries.

Opportunity

Explore name: opportunity

Raw opportunity entity data with extensive joins to organizations, contacts, account managers, pipelines, statuses, types, sources, market segments, projects, and revenue types.

Deliverable

Explore name: deliverable

Raw deliverable entity data joined to projects, organizations, revenue types, statuses, calculation lines, resource allocations, and people.

Time Entry

Explore name: time_entry

Raw time entry data with extensive joins to employees, activities, projects, organizations, deliverables, absence types, revenue types, opportunities, and project managers.

Journal Entry

Explore name: journal_entry

Raw financial journal entry data joined to departments, organizations, projects, deliverables, revenue types, ledger accounts, book entries, and journals.

Choosing the Right Data Source

When adding a new tile, the first decision is which data source to use. The table below maps common reporting questions to the recommended data source.

| Question / Report Need | Recommended Data Source |
|--|------------------------------------|
| How profitable are my projects? | Report Projects |
| What is the status of my sales pipeline? | Report Opportunities |
| How are my employees spending their time? | Report Time Entries |
| Are employees meeting billability targets? | Report Billability Employees |
| What resources are planned for the coming weeks? | Report Planned Hours |
| How much will we invoice in the coming months? | Report Forward-Looking Invoicing |
| What is the aging of outstanding invoices? | Report Project Invoices |
| What is our revenue forecast vs. actuals? | Report Revenue Actual and Forecast |
| What margin can I expect on my projects? | Report Margin Forecast |
| How are deliverables tracking within a project? | Report Deliverables |
| Do we have enough resources booked for deals? | Report Opportunity Bookings |
| What skills do my employees have? | Report Employee Skills |
| How much leave do employees have remaining? | Report Leave Budgets |
| What tasks are overdue or assigned to whom? | Report Tasks |
| I need to review ledger transactions | Report Financial Transactions |

Tips for Working with Data Sources

- **Start with Report data sources.** They are optimized for dashboards and contain pre-calculated fields. Only use entity-level data sources when the Report versions do not have the fields you need.
- **Use filters.** Apply filters at the dashboard level (so users can adjust them) or at the tile level (to hard-code a specific filter for that chart).
- **Combine dimensions and measures thoughtfully.** Select one or more dimensions to group your data, then add measures to aggregate. Avoid selecting too many dimensions at once.
- **Use date dimension groups for time-based analysis.** Pick the granularity (day, week, month, quarter, year) that matches your reporting needs.
- **Remember department-level security.** Data is automatically filtered by department permissions. A dashboard may show different data to different users.

Need Help?

If you have questions about your Looker account, dashboard permissions, data sources, or VOGSY Dashboards, reach out to your VOGSY administrator.