

Employee Budget

PWR303.RPT

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Overview

Purpose of the Report

The Employee Budget report helps you determine how close each employee came to their budget goal. Use this report to generate an analysis of actual hours, dollars, chargeable and non-chargeable current period and year-to-date totals against the employee's budgeted activity. Note: This report is a date based report.

When to Produce the Report

Produce the Employee Budget before each Period Close.

Permissions Required to Access the Report

An employee must have 'Administration' checked in the Employee's Permissions to be able to produce this report

Comparing Reports

Because the Employee Budget is a date based report it may not match period based reports such as Employee Time Analysis, WIP Reconciliation, Period Comparison and General Ledger.

Sort Options Available

You can determine the order that the employees appear on the report by choosing one or more of the following fields:

- Employee ID
- Employee Name
- Employee Office
- Employee Department
- Employee Manager
- Team ID

Note: The subtotal check box on the Sort tab is checked and disabled for this report since this is a summary report and only subtotals print.

Select Options Available

You can determine which employees will appear on the report by entering a range or a list in one or more of the following fields:

- Employee ID
- Employee Name
- Employee Office
- Employee Department
- Employee Manager
- Team ID

Format Options

Presentation Options

You can choose what information should appear on the report:

- Show Chargeable - if checked, then chargeable actual and budget hours and amounts for PTD and YTD are reported.
- Show Non-Chargeable - if checked, then non-chargeable actual and budget hours and amounts for PTD and YTD are reported.

Report Layout

Employee: (1)

Page: 1

Billam and Smyle
Employee Budget Report
 For the Period Ending August 31, 1997

(2)	PTD Hours	%	PTD Amount	%	YTD Hours	%	YTD Amount	%
(3)								
<i>{ Chargeable }</i>								
Chargeable	(4)		(5)		(6)		(7)	
Budget Chargeable	(8)	(9)	(10)		(11) (12)		(13) (14)	(15)
<i>{ Non-Chargeable }</i>								
Non-Chargeable	(16)		(17)		(18)		(19)	
Budget Non-Chargeable	(20)	(21)	(22)		(23) (24)		(25) (26)	(27)
<i>{ Totals }</i>								
Total Time	(28)		(29)		(30)		(31)	
Total Budget	(32)	(33)	(34)		(35)(36)		(37) (38)	(39)

- (1) Calculated field: Employee ID of Employee producing the report
 - (2) Calculated field: The text for the lowest sort chosen on the Sort/Subtotal tab with a subtotal.
 - (3) Calculated field: The sort field selected at report runtime
- { Chargeable }**
- (4) Calculated field: The sum of Hours field divided by 100 in WIP records with TranType 'T', Chargeable 'C' in the WORKCODE record and TranDate greater than or equal to the first day of the current period and less than or equal to the current period end.
 - (5) Calculated field: The sum of AdjAmount field in WIP records with TranType 'T', Chargeable 'C' in the WORKCODE record and TranDate greater than or equal to the first day of the current period and less than or equal to the current period end.
 - (6) Calculated field: The sum of Hours field divided by 100 in WIP records with TranType 'T', Chargeable 'C' in the WORKCODE record and TranDate greater than or equal to the first day of the current fiscal year and less than or equal to the year end.
 - (7) Calculated field: The sum of AdjAmount field in WIP records with TranType 'T', Chargeable 'C' in the WORKCODE record and TranDate greater than or equal to the first day of the current fiscal year and less than or equal to the year end.
 - (8) Calculated field: The sum of ChgHrs field in STAFBDGT records with PeriodNum equal to the current period number.
 - (9) Calculated field: If (8) is not equal to zero then (4) divided by (8) times 100 otherwise it is zero.
 - (10) Calculated field: The sum of ChgDlrs field in STAFBDGT records with PeriodNum equal to the current period number.
 - (11) Calculated field: If (10) is not equal to zero then (5) divided by (10) times 100 otherwise it is zero.
 - (12) Calculated field: The sum of ChgHrs field in STAFBDGT records with PeriodNum greater than the prior year end period number and less than or equal to the current period number.
 - (13) Calculated field: If (12) is not equal to zero then (6) divided by (12) times 100 otherwise it is zero.
 - (14) Calculated field: The sum of ChgDlrs field in STAFBDGT records with PeriodNum greater than the prior year end period number and less than or equal to the current period number.
 - (15) Calculated field: If (14) is not equal to zero then (7) divided by (14) times 100 otherwise it is zero.
- { Non-Chargeable }**
- (16) Calculated field: The sum of Hours field divided by 100 in WIP records with TranType 'T', Chargeable not equal to 'C' in the WORKCODE record and TranDate greater than or equal to the first day of the current period and less than or equal to the current period end.
 - (17) Calculated field: The sum of AdjAmount field in WIP records with TranType 'T', Chargeable not equal to 'C' in the WORKCODE record and TranDate greater than or equal to the first day of the current period and less than or equal to the current period end.
 - (18) Calculated field: The sum of Hours field divided by 100 in WIP records with TranType 'T', Chargeable not equal to 'C' in the WORKCODE record and TranDate greater than or equal to the first day of the current fiscal year and less than or equal to the year end.
 - (19) Calculated field: The sum of AdjAmount field in WIP records with TranType 'T', Chargeable not equal to 'C' in the WORKCODE record and TranDate greater than or equal to the first day of the current fiscal year and less than or equal to the year end.
 - (20) Calculated field: The sum of NchgHrs field in STAFBDGT records with PeriodNum equal to the current period number.
 - (21) Calculated field: If (20) is not equal to zero then (16) divided by (20) times 100 otherwise it is zero.
 - (22) Calculated field: The sum of NchgDlrs field in STAFBDGT records with PeriodNum equal to the current period number.
 - (23) Calculated field: If (22) is not equal to zero then (17) divided by (22) times 100 otherwise it is zero.
 - (24) Calculated field: The sum of NchgHrs field in STAFBDGT records with PeriodNum greater than the prior year end period number and less than or equal to the current period number.
 - (25) Calculated field: If (24) is not equal to zero then (18) divided by (24) times 100 otherwise it is zero.
 - (26) Calculated field: The sum of NchgDlrs field in STAFBDGT records with PeriodNum greater than the prior year end period number and less than or equal to the current period number.
 - (27) Calculated field: If (26) is not equal to zero then (19) divided by (26) times 100 otherwise it is zero.
- { Totals }**
- (28) Calculated field: The sum of (4) and (16).
 - (29) Calculated field: The sum of (5) and (17).
 - (30) Calculated field: The sum of (6) and (18).
 - (31) Calculated field: The sum of (7) and (19).
 - (32) Calculated field: The sum of (8) and (20).
 - (33) Calculated field: If (32) is not equal to zero then (28) divided by (32) times 100 otherwise it is zero.
 - (34) Calculated field: The sum of (10) and (22).
 - (35) Calculated field: If (34) is not equal to zero then (29) divided by (34) times 100 otherwise it is zero.
 - (36) Calculated field: The sum of (12) and (24).
 - (37) Calculated field: If (36) is not equal to zero then (30) divided by (36) times 100 otherwise it is zero.
 - (38) Calculated field: The sum of (14) and (26).
 - (39) Calculated field: If (38) is not equal to zero then (31) divided by (38) times 100 otherwise it is zero.

Glossary

A/R activity - consists of Invoices, Tax, Finance Charges, Payments, and Adjustments.

Current state report - a report that reflects the data as it is now, without regard to what happened during the period or year. See also Point in time report.

Date based report - a report that filters transactions or accumulates amounts based on the date of the transaction rather than when the transaction was posted. For example, if a transaction dated in January was not posted until after January had been closed, a date based report would report as if the transaction was entered in January. See also Period based report.

Future dated A/R activity - any A/R activity with a PeriodNum greater than the current period.

Future dated WIP activity - any WIP activity with a PeriodNum or BilledPeriodNum greater than the current period.

Period based report - a report that filters transactions or accumulates amounts based on when the transaction was posted rather than the date of the transaction. For example, if a transaction dated in January was not posted until after January had been closed and the current period was February, a period based report would report as if the transaction was entered in February. See also Date based report.

Point in time report - a report that reflects the data as it was posted during a period of time, without regard to the current state of the data. For example, the PTD WIP Reconciliation shows how much time was posted to an account during the current period, not how much is left in the account when the report is printed. See also Current state report.

PTD - Period-to-date.

WIP activity - consists of Time, Expenses, Billings, MarkUps, MarkDowns, and Transfers in WIP.

YTD - Year-to-date.