



Dynamic Budgets User Guide for Define Custom Reports-Actual, Variance, Comments



User Guide **for** **Define Custom Reports-** **Actual, Variance, Comments**



Define Custom Reports Prerequisite Steps Make use of the reporting tags 1-10 in manage objects, orgunits and master chart of accounts. This helps with the display of desired accounts for reporting purposes.



Define Custom Reports Prerequisite Steps

Make use of the reporting tags 1-10 in manage objects, orgunits, and master chart of accounts. This helps with the display of desired accounts for reporting purposes.



Purpose: Define Custom Reports Custom Reports allows you to create custom columns and rows designed by users to include user-specified data leveraging the tags for manage objects, orgunits, and the master chart of accounts.



Define Custom Reports

Purpose: Custom Reports allows you to create custom columns and rows designed by users to include user-specified data leveraging the tags for manage objects, orgunits, and the master chart of accounts.



Note: This is an example of the custom report we are about to create named 23 vs 24 Actual. It compares 2023 Actual to 2024 Actual, calculates the variance amount and % with the ability to view comments entered monthly or for the fiscal period.

Reports > Custom Reports > Custom Reports

CompanyDB: DB3147_two18 OrgUnit RollUp: <all> Object RollUp: <all> Report: 23 vs 24 Actual

OrgUnit: <all> Object: <all> Search Advanced ☐ Exclude zero value accounts

Select Month: <per rpt setup> ☐ Show Simple Comments ☐ Show Comments to date

Accounts highlighted are itemized, click the account number link to edit line items

Dashboard Account Details

CompanyDB: DB3147_two18 BudgetID:

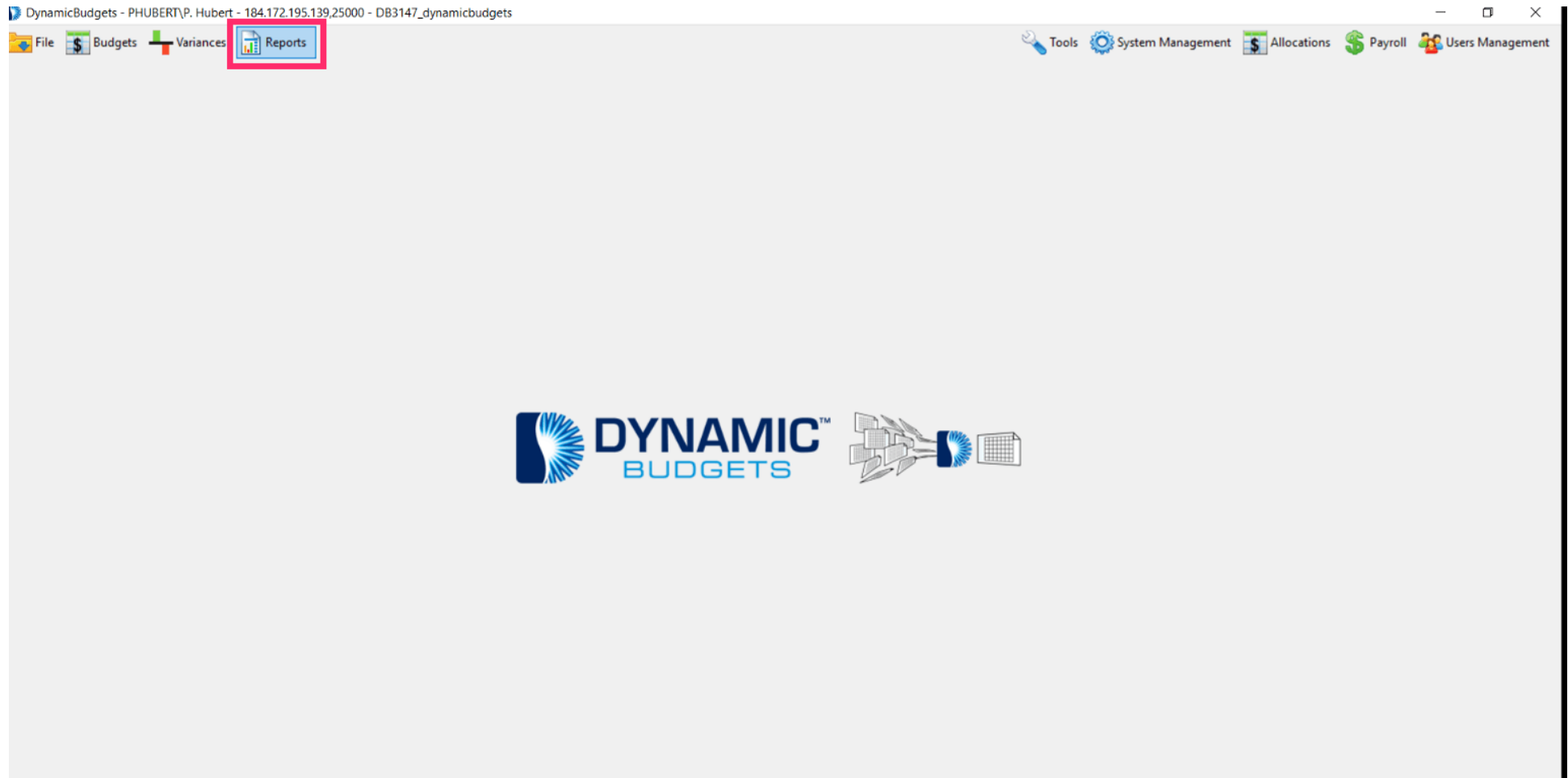
Print Export to Excel Print to PDF AutoSize Columns

Display Level: 4 Row Format: <No Format> Hide Extended Column Header

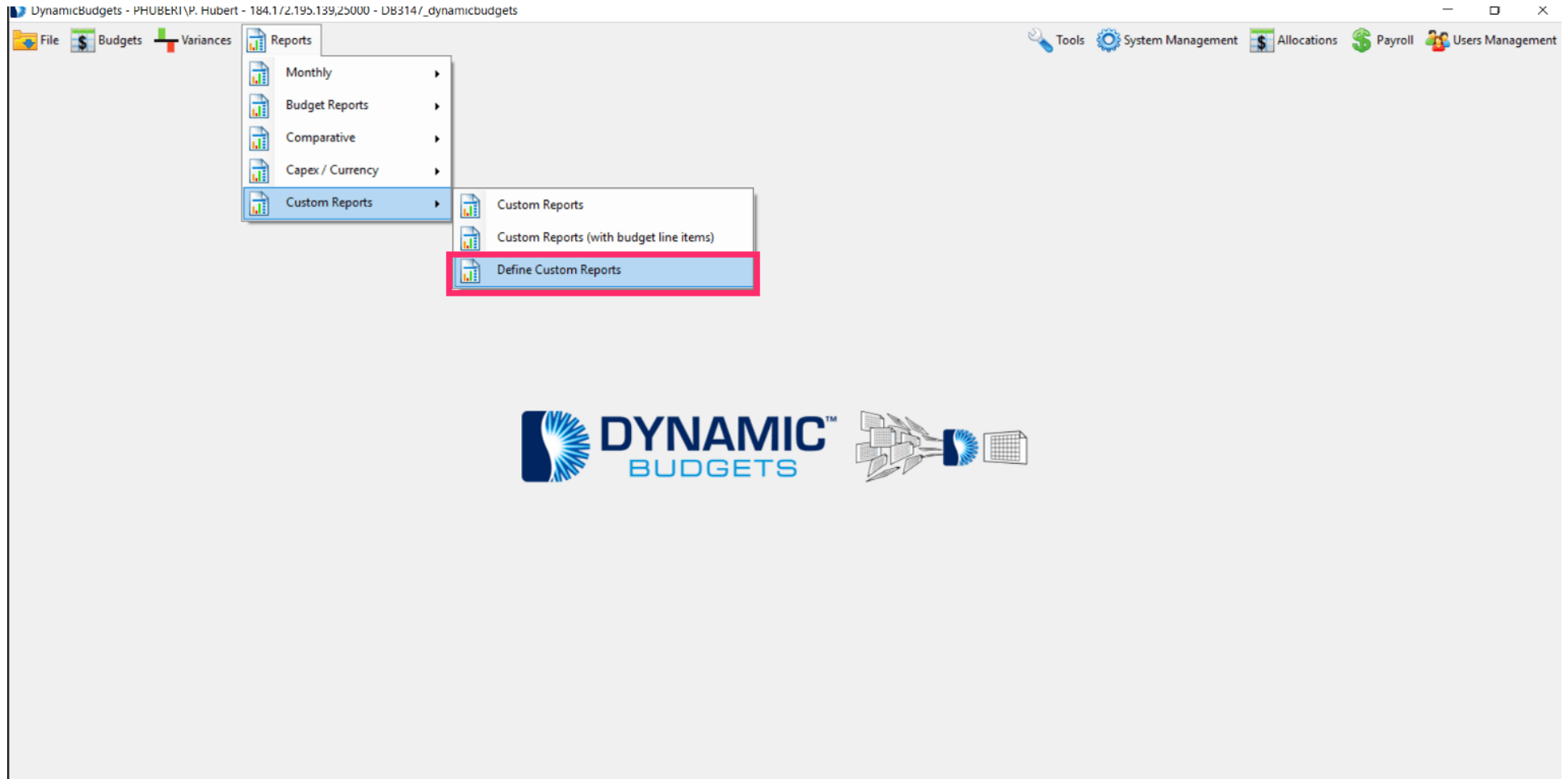
| AccountNum | AccountDescr | 2023 Actual | 2024 Actual | 23 vs 24 Actual | % | Enter Comments Here | Comments History |
|-------------|-------------------------------------|-------------|-------------|-----------------|-----------|---------------------|---|
| 000-4110-02 | US Sales - Finished Goods | 85,643.34 | 79,604.49 | (6,038.85) | -7.05 % | | [03/06/2018 12:48] [PHUBERT/P. Hubert] [\$6K] Jan - Comments Test |
| 000-4111-01 | Canadian Sales - Retail/Parts | 45,208.55 | 45,208.55 | - | 0.00 % | | |
| 000-4111-02 | Canadian Sales - Finished Goods | - | - | - | 0.00 % | | |
| 000-4112-01 | AustralAsian Sales - Retail/Parts | 96,936.57 | 96,936.57 | - | 0.00 % | | |
| 000-4112-02 | AustralAsian Sales - Finished Goods | 6,290.65 | 6,290.65 | - | 0.00 % | | |
| 000-4114-01 | Germany Sales - Retail/Parts | 5,114.74 | - | (5,114.74) | -100.00 % | | |
| 000-4114-02 | Germany Sales - Finished Goods | - | - | - | 0.00 % | | |
| 000-4115-01 | United Kingdom Sales - Retail/Parts | 894.12 | 894.12 | - | 0.00 % | | |
| 000-4115-02 | United Kingdom Sales - Finished Go | 6,542.12 | 6,542.12 | - | 0.00 % | | |
| 000-4116-01 | South Africa - Retail/Parts | 5,034.33 | 5,034.33 | - | 0.00 % | | |



Click on **Reports**



Click on **Custom Reports**, then **Define Custom Reports**





Click on the **CompanyDB** dropdown list. Select a company. For this example, we will select **DB3147_two18**.

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Reports > Custom Reports > Define Custom Reports

CompanyDB*
DB3147_two18
DB3147_two18

Report
<select>

Save Changes Add New Column Delete Report Add New Report Clone Report

Form Name Primary BudgetID for Accounts List *

☐ Form Enabled ☐ Allow period as input ☐ Flip sign for Variances (Better/Worse for CR vs DR Accts)

Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period | Month / YTD | Report Level | VarCompCol | VarBaseCol | VarCommitments | NumberFormat | Hidden | <input type="checkbox"/> Background Color | Text Color | FormulaResolved | Th |
|-----------------|-------------|-----------------|----------|---------------|-------------|--------------|------------|------------|----------------|--------------|--------|---|------------|-----------------|----|
|-----------------|-------------|-----------------|----------|---------------|-------------|--------------|------------|------------|----------------|--------------|--------|---|------------|-----------------|----|



Click on [Add New Report](#)

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FileBudgetsVariancesReports

ToolsSystem ManagementAllocationsPayrollUsers Management

Reports > Custom Reports > Define Custom Reports

CompanyDB*
DB3147_two18

Report
<select>

Save Changes

Add New Column

Delete Report

Add New Report

Clone Report

Form Name

Primary BudgetID for Accounts

Add New Report

☐ Form Enabled

☐ Allow period as input

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(Better\Worse for CR vs DR Accts)

Column Layout

Row Layout

Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period | Month / YTD | Report Level | VarCompCol | VarBaseCol | VarCommitments | NumberFormat | Hidden | <input type="checkbox"/> Background Color | Text Color | FormulaResolved | Th |
|-----------------|-------------|-----------------|----------|---------------|-------------|--------------|------------|------------|----------------|--------------|--------|---|------------|-----------------|----|
|-----------------|-------------|-----------------|----------|---------------|-------------|--------------|------------|------------|----------------|--------------|--------|---|------------|-----------------|----|



Click in the **Report Name** box. **Type a report name.** For this example, we will enter **23 vs 24 Actual**.

The screenshot shows the 'DynamicBudgets' application interface. The main window is titled 'DynamicBudgets - PHUBERT\p. Hubert - 184.172.195.139,25000 - DB3147_dynamicbudgets'. The 'Reports' menu is open, and the 'Define Custom Reports' dialog box is displayed. The dialog box has a 'CompanyDB*' dropdown set to 'DB3147_two18' and a 'Report' dropdown set to '<select>'. Below these are buttons for 'Save Changes', 'Add New Column', 'Delete Report', and 'Add New'. The 'Add New' button is highlighted. A modal dialog box titled 'Add New Custom Report' is open, showing the 'CompanyDB' as 'DB3147_two18' and a 'Report Name*' field with a red border, indicating where to enter the report name. The background shows a table with columns: 'Column Position', 'Column Name', 'Data Entry Type', 'BudgetID', 'NumberFormat', 'Hidden', 'Background Color', 'Text Color', 'FormulaResolved', and 'Th'.



Click on **Add New**

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Reports > Custom Reports > Define Custom Reports

CompanyDB* DB3147_two18 Report <select>

Save Changes Add New Column Delete Report Add New Report Clone Report

Form Name # Primary BudgetID for Accounts 2024 Actual

Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and click the Delete icon.

| Column Position | Column Name | Data Entry Type | BudgetID | Filter |
|-----------------|-------------|-----------------|----------|--------|
|-----------------|-------------|-----------------|----------|--------|

Add New Custom Report

Add New

CompanyDB: DB3147_two18

Report Name*: 23 vs 24 Actual

Add New Cancel

Hidden Background Color Text Color FormulaResolved Threshold



On row 1, click on the **BudgetID** dropdown list. Make a selection. For this example, we will select **2023 Actual**. Note: the BudgetID menu lists live data sets or data sources that are available from GP in Dynamic Budgets system.

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Reports > Custom Reports > Define Custom Reports

CompanyDB* DB3147_two18 Report 23 vs 24 Actual

Save Changes Add New Column Delete Report Add New Report Clone Report

23 vs 24 Actual # 6 Primary BudgetID for Accounts List *

23 vs 24 Actual ☒ Form Enabled ☐ Allow period as input ☐ Flip sign for Variances (Better|Worse for CR vs DR Accts)

Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | FormulaResolved | Threshold |
|-----------------|-------------|-----------------|--------------|---------------------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|-----------------|-----------|
| 1 | | | BudgetID | | | | | | Value | <input type="checkbox"/> | | | | |
| 2 | | | BudgetIDDesc | | | | | | Value | <input type="checkbox"/> | | | | |
| 3 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 4 | | | 2023 Actual | | | | | | Value | <input type="checkbox"/> | | | | |
| 5 | | | 2024 Actual | | | | | | Value | <input type="checkbox"/> | | | | |
| 6 | | | Budget 2025 | | | | | | Value | <input type="checkbox"/> | | | | |
| 7 | | | Budget 2026 | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | Budget 2028 | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | Budget 2027 | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | Budget 2024 | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | Value | <input type="checkbox"/> | | | | |



On row 2, click on the **BudgetID** dropdown list. Make a selection. For this example, we will select **2024 Actual**.

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Reports > Custom Reports > Define Custom Reports

CompanyDB* DB3147_two18 Report 23 vs 24 Actual

Save Changes Add New Column Delete Report Add New Report Clone Report

23 vs 24 Actual # 6 Primary BudgetID for Accounts List *

23 vs 24 Actual ☐ Form Enabled ☐ Allow period as input ☐ Flip sign for Variances (Better\Worse for CR vs DR Accts)

Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | FormulaResolved | Threshold |
|-----------------|-------------|-----------------|--|---------------------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|-----------------|-----------|
| 1 | | | 2023 Actual | | | | | | Value | <input type="checkbox"/> | | | | |
| 2 | | | <div> <div>2023 Actual</div> <div>BudgetIDDesc</div> <div>2023 Actual</div> <div>2024 Actual</div> <div>Budget 2025</div> <div>Budget 2026</div> <div>Budget 2028</div> <div>Budget 2027</div> <div>Budget 2024</div> </div> | | | | | | Value | <input type="checkbox"/> | | | | |
| 3 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 4 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 5 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 6 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | Value | <input type="checkbox"/> | | | | |

- Copy the selected BudgetID for rows 1 and 2. Click in the row 1 cell under BudgetID, shift, down arrow to row 2, then control C (to copy).

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Reports > Custom Reports > Define Custom Reports

CompanyDB* DB3147_two18 Report 23 vs 24 Actual

Save Changes Add New Column Delete Report Add New Report Clone Report

23 vs 24 Actual # 6 Primary BudgetID for Accounts List *

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Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | FormulaResolved | Threshold |
|-----------------|-------------|-----------------|-------------|---------------------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|-----------------|-----------|
| 1 | | | 2023 Actual | | | | | | Value | <input type="checkbox"/> | | | | |
| 2 | | | 2024 Actual | | | | | | Value | <input type="checkbox"/> | | | | |
| 3 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 4 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 5 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 6 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | Value | <input type="checkbox"/> | | | | |



Paste the selected BudgetID for rows 1 and 2 to Column Name for row 1 and 2. Click in the row 1 cell under Column Name, then control V (to paste).

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Save Changes Add New Column Delete Report Add New Report Clone Report

23 vs 24 Actual # 6 Primary BudgetID for Accounts List *

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Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | FormulaResolved | Threshold |
|-----------------|-------------|-----------------|-------------|---------------------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|-----------------|-----------|
| 1 | 2023 Actual | | 2023 Actual | | | | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | | 2024 Actual | | | | | | Value | <input type="checkbox"/> | | | | |
| 3 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 4 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 5 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 6 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | Value | <input type="checkbox"/> | | | | |



On row 1, click on the **Data Entry Type** dropdown list. Make a selection. For this example, we will select **ReadOnly**. Note: The Data Entry Type menu lists the different types of source data options available.

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Reports > Custom Reports > Define Custom Reports

CompanyDB* DB3147_two18 Report 23 vs 24 Actual

Save Changes Add New Column Delete Report Add New Report Clone Report

23 vs 24 Actual # 6 Primary BudgetID for Accounts List *

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Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | FormulaResolved | Threshold |
|-----------------|-------------|-----------------|-------------|---------------------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|-----------------|-----------|
| 1 | 2023 Actual | ▼ | 2023 Actual | | | | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | Name | 2024 Actual | | | | | | Value | <input type="checkbox"/> | | | | |
| 3 | | ReadOnly | | | | | | | Value | <input type="checkbox"/> | | | | |
| 4 | | VarianceValue | | | | | | | Value | <input type="checkbox"/> | | | | |
| 5 | | VariancePcnt | | | | | | | Value | <input type="checkbox"/> | | | | |
| 6 | | Remaining to S | | | | | | | Value | <input type="checkbox"/> | | | | |
| 7 | | CustomCalc | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | Comments | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | CommentsHisc | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | < > | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | Value | <input type="checkbox"/> | | | | |



On row 1, copy the Data Entry Type for row 1 to row 2. Click in the cell under Data Entry Type, Control C (to copy).

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Reports > Custom Reports > Define Custom Reports

CompanyDB* DB3147_two18 Report 23 vs 24 Actual

Save Changes Add New Column Delete Report Add New Report Clone Report

23 vs 24 Actual # 6 Primary BudgetID for Accounts List *

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Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | FormulaResolved | Threshold |
|-----------------|-------------|-----------------|-------------|---------------------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|-----------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | | | | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | | 2024 Actual | | | | | | Value | <input type="checkbox"/> | | | | |
| 3 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 4 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 5 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 6 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | Value | <input type="checkbox"/> | | | | |

Then click in row 2. Now **Control V** (to paste).

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Reports > Custom Reports > Define Custom Reports

CompanyDB* DB3147_two18 Report 23 vs 24 Actual

Save Changes Add New Column Delete Report Add New Report Clone Report

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Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | FormulaResolved | Threshold |
|-----------------|-------------|-----------------|-------------|----------------------------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|-----------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | <input type="button" value="v"/> | | | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | | | | | | Value | <input type="checkbox"/> | | | | |
| 3 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 4 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 5 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 6 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | Value | <input type="checkbox"/> | | | | |



On row 1, click on the **Fiscal Period** dropdown list. Make a selection (fiscal period/last month). For this example, we will select **Dec**.

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Reports > Custom Reports > Define Custom Reports

CompanyDB* DB3147_two18 Report 23 vs 24 Actual

Save Changes Add New Column Delete Report Add New Report Clone Report

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Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period | Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | FormulaResolved | Threshold |
|-----------------|-------------|-----------------|-------------|---------------|-------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|-----------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | ▼ | | | | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | Na | | | | | | Value | <input type="checkbox"/> | | | | |
| 3 | | | | Dec | | | | | | Value | <input type="checkbox"/> | | | | |
| 4 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 5 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 6 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |



On row 1, click on the **Month/YTD** dropdown list. Make a selection. For this example, we will select **YTD**. Note: The Month/YTD menu lists the data sets or data source date range options.

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Reports > Custom Reports > Define Custom Reports

CompanyDB* DB3147_two18 Report 23 vs 24 Actual

Save Changes Add New Column Delete Report Add New Report Clone Report

23 vs 24 Actual # 6 Primary BudgetID for Accounts List *

23 vs 24 Actual ☐ Form Enabled ☐ Allow period as input ☐ Flip sign for Variances (Better\Worse for CR vs DR Accts)

Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then click the Delete button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period | Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | FormulaResolved | Threshold |
|-----------------|-------------|-----------------|-------------|---------------|-------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|-----------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec | Month / YTD | | | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | | Month | | | | | Value | <input type="checkbox"/> | | | | |
| 3 | | | | | QTD | | | | | Value | <input type="checkbox"/> | | | | |
| 4 | | | | | YTD | | | | | Value | <input type="checkbox"/> | | | | |
| 5 | | | | | YTD-Avg | | | | | Value | <input type="checkbox"/> | | | | |
| 6 | | | | | FullYear | | | | | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |



On row 1, click on the **Report Level** dropdown list. Make a selection. For this example, we will select **GL Code**. Note: The Report Level menu lists G/L account based, object or object rollup reports options.

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File Budgets Variances Reports

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Company/DB* DB3147_two18 Report 23 vs 24 Actual

Save Changes Add New Column Delete Report Add New Report Clone Report

23 vs 24 Actual # 6 Primary BudgetID for Accounts List *

23 vs 24 Actual ☐ Form Enabled ☐ Allow period as input ☐ Flip sign for Variances (Better|Worse for CR vs DR Accts)

Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button.

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | FormulaResolved | Threshold |
|-----------------|-------------|-----------------|-------------|---------------------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|-----------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec YTD | Report Level | | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | | Name | | | | Value | <input type="checkbox"/> | | | | |
| 3 | | | | | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 4 | | | | | Object | | | | Value | <input type="checkbox"/> | | | | |
| 5 | | | | | ObjectRollup | | | | Value | <input type="checkbox"/> | | | | |
| 6 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | Value | <input type="checkbox"/> | | | | |

On row 3, under Column Name, type **23 vs 24 Actual**.

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CompanyDB* DB3147_two18 Report 23 vs 24 Actual

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23 vs 24 Actual # 6 Primary BudgetID for Accounts List * 23 vs 24 Actual

☒ Form Enabled ☐ Allow period as input ☐ Flip sign for Variances (Better\Worse for CR vs DR Accts)

Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period | Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | FormulaResolved | Threshold |
|-----------------|-----------------|-----------------|-------------|---------------|-------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|-----------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec | YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | | | | | | | Value | <input type="checkbox"/> | | | | |
| 3 | 23 vs 24 Actual | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 4 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 5 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 6 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |



On row 3, click on the **Data Entry Type** dropdown list. Make a selection. For this example, we will select **VarianceValue**.

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CompanyDB* DB3147_two18 Report 23 vs 24 Actual

Save Changes Add New Column Delete Report Add New Report Clone Report

23 vs 24 Actual # 6 Primary BudgetID for Accounts List *

23 vs 24 Actual ☒ Form Enabled ☐ Allow period as input ☐ Flip sign for Variances (Better/Worse for CR vs DR Accts)

Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | FormulaResolved | Threshold |
|-----------------|-----------------|--|-------------|---------------------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|-----------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec | YTD | | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | | | | | | Value | <input type="checkbox"/> | | | | |
| 3 | 23 vs 24 Actual | <div>▼ Name ReadOnly VarianceValue VariancePoint Remaining to S CustomCalc Comments CommentsHisc < ></div> | | | | | | | Value | <input type="checkbox"/> | | | | |
| 4 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 5 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 6 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | Value | <input type="checkbox"/> | | | | |



On row 4, under Column Name, type %.

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Save Changes Add New Column Delete Report Add New Report Clone Report

23 vs 24 Actual # 6 Primary BudgetID for Accounts List *

23 vs 24 Actual ☐ Form Enabled ☐ Allow period as input ☐ Flip sign for Variances (Better\Worse for CR vs DR Accts)

Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period | Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | FormulaResolved | Threshold |
|-----------------|--------------|-----------------|-------------|---------------|-------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|-------------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec | YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | | | | | | | Value | <input type="checkbox"/> | | | | |
| 3 | 23 vs Actual | VarianceValue | | | | | | | | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) | |
| 4 | % | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 5 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 6 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |



On row 4, click on the **Data Entry Type** dropdown list. Make a selection. For this example, we will select **VariancePcnt**.

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CompanyDB* DB3147_two18 Report 23 vs 24 Actual

Save Changes Add New Column Delete Report Add New Report Clone Report

23 vs 24 Actual # 6 Primary BudgetID for Accounts List *

23 vs 24 Actual ☐ Form Enabled ☐ Allow period as input ☐ Flip sign for Variances (Better\Worse for CR vs DR Accts)

Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period | Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | FormulaResolved | Threshold |
|-----------------|-----------------|---------------------|-------------|---------------|-------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|----------------------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec | YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | | | | | | | Value | <input type="checkbox"/> | | | | |
| 3 | 23 vs 24 Actual | VarianceValue | | | | | | | | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) | |
| 4 | % | VariancePcnt | | | | | | | | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) / Col-NA | |
| 5 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 6 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |

On row 5, under Column Name, type **Enter Comments Here**

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23 vs 24 Actual # 6 Primary BudgetID for Accounts List * 23 vs 24 Actual

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Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | FormulaResolved | Threshold |
|-----------------|---------------------|-----------------|-------------|---------------------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|----------------------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec | YTD | GLCode | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | | | | | | Value | <input type="checkbox"/> | | | | |
| 3 | 23 vs 24 Actual | VarianceValue | | | | | | | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) | |
| 4 | % | VariancePcnt | | | | | | | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) / Col-NA | |
| 5 | Enter Comments Here | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 6 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | Value | <input type="checkbox"/> | | | | |



On row 5, click on the **Data Entry Type** dropdown list. Make a selection. For this example, we will select **Comments**.

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23 vs 24 Actual # 6 Primary BudgetID for Accounts List *

23 vs 24 Actual ☒ Form Enabled ☐ Allow period as input ☐ Flip sign for Variances (Better/Worse for CR vs DR Accts)

Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | FormulaResolved | Threshold |
|-----------------|---------------------|------------------|-------------|---------------------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|----------------------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec | YTD | GLCode | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | | | | | | Value | <input type="checkbox"/> | | | | |
| 3 | 23 vs 24 Actual | VarianceValue | | | | | | | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) | |
| 4 | % | VariancePcnt | | | | | | | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) / Col-NA | |
| 5 | Enter Comments Here | Comments | | | | | | | Value | <input type="checkbox"/> | | | | |
| 6 | | Name | | | | | | | Value | <input type="checkbox"/> | | | | |
| 7 | | ReadOnly | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | VarianceValue | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | VariancePcnt | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | Remaining to Spe | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | CustomCalc | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | Comments | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | CommentsHistory | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | Value | <input type="checkbox"/> | | | | |

On row 6, under Column Name, type **Comments History**.

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23 vs 24 Actual # 6 Primary BudgetID for Accounts List * 23 vs 24 Actual

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Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | FormulaResolved | Threshold |
|-----------------|---------------------|-----------------|-------------|---------------------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|----------------------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec | YTD | GLCode | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | | | | | | Value | <input type="checkbox"/> | | | | |
| 3 | 23 vs 24 Actual | VarianceValue | | | | | | | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) | |
| 4 | % | VariancePcnt | | | | | | | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) / Col-NA | |
| 5 | Enter Comments Here | Comments | | | | | | | Value | <input type="checkbox"/> | | | | |
| 6 | Comments History | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | Value | <input type="checkbox"/> | | | | |



On row 6, click on the **Data Entry Type** dropdown list. Make a selection. For this example, we will select **CommentsHistory**.

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23 vs 24 Actual # 6 Primary BudgetID for Accounts List *

23 vs 24 Actual ☒ Form Enabled ☐ Allow period as input ☐ Flip sign for Variances (Better/Worse for CR vs DR Accts)

Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | FormulaResolved | Threshold |
|-----------------|---------------------|--|-------------|---------------------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|----------------------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec | YTD | GLCode | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | | | | | | Value | <input type="checkbox"/> | | | | |
| 3 | 23 vs 24 Actual | VarianceValue | | | | | | | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) | |
| 4 | % | VariancePcnt | | | | | | | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) / Col-NA | |
| 5 | Enter Comments Here | Comments | | | | | | | Value | <input type="checkbox"/> | | | | |
| 6 | Comments History | <div> <div></div> <div>Name</div> <div>ReadOnly</div> <div>VarianceValue</div> <div>VariancePcnt</div> <div>Remaining to Spe</div> <div>CustomCalc</div> <div>Comments</div> <div>CommentsHistory</div> </div> | | | | | | | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | Value | <input type="checkbox"/> | | | | |

- Copy the selected Fiscal Period, Month/End, Report Level on row 1. Click in the row 2 cell under Fiscal Period, shift, right arrow, to Report Level, then control C (to copy).

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23 vs 24 Actual # 6 Primary BudgetID for Accounts List * 23 vs 24 Actual

☒ Form Enabled ☐ Allow period as input ☐ Flip sign for Variances (Better/Worse for CR vs DR Accts)

Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period | Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | Formula Resolved | Threshold |
|-----------------|---------------------|-----------------|-------------|---------------|-------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|----------------------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec | YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | | | | | | | Value | <input type="checkbox"/> | | | | |
| 3 | 23 vs 24 Actual | VarianceValue | | | | | | | | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) | |
| 4 | % | VariancePcnt | | | | | | | | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) / Col-NA | |
| 5 | Enter Comments Here | Comments | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 6 | Comments History | CommentsHistory | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |



Now **shift, down arrow** to row 6.

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Reports > Custom Reports > Define Custom Reports

CompanyDB* DB3147_two18 Report 23 vs 24 Actual

Save Changes Add New Column Delete Report Add New Report Clone Report

23 vs 24 Actual # 6 Primary BudgetID for Accounts List * 23 vs 24 Actual

☒ Form Enabled ☐ Allow period as input ☐ Flip sign for Variances (Better/Worse for CR vs DR Accts)

Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | FormulaResolved | Threshold |
|-----------------|---------------------|-----------------|-------------|---------------------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|----------------------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | | | | | | Value | <input type="checkbox"/> | | | | |
| 3 | 23 vs 24 Actual | VarianceValue | | | | | | | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) | |
| 4 | % | VariancePcnt | | | | | | | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) / Col-NA | |
| 5 | Enter Comments Here | Comments | | | | | | | Value | <input type="checkbox"/> | | | | |
| 6 | Comments History | CommentsHistory | | | | | | | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | Value | <input type="checkbox"/> | | | | |



Control V (to paste).

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File Budgets Variances Reports

Tools System Management Allocations Payroll Users Management

Reports > Custom Reports > Define Custom Reports

CompanyDB* DB3147_two18 Report 23 vs 24 Actual

Save Changes Add New Column Delete Report Add New Report Clone Report

23 vs 24 Actual # 6 Primary BudgetID for Accounts List *

23 vs 24 Actual ☐ Form Enabled ☐ Allow period as input ☐ Flip sign for Variances (Better\Worse for CR vs DR Accts)

Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | Formula Resolved | Threshold |
|-----------------|---------------------|-----------------|-------------|---------------------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|----------------------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 3 | 23 vs 24 Actual | VarianceValue | | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) | |
| 4 | % | VariancePcnt | | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) / Col-NA | |
| 5 | Enter Comments Here | Comments | | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 6 | Comments History | CommentsHistory | | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | Value | <input type="checkbox"/> | | | | |



On row 3, click on the **1st Calc Factor** dropdown list. Make a selection. For this example, we will select **2**. Note: The 1st Calc Factor menu lists the row # for the data source to create a formula. 2 in this example represents 2024 Actual.

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23 vs 24 Actual # 6 Primary BudgetID for Accounts List *

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Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | FormulaResolved | Threshold |
|-----------------|---------------------|-----------------|-------------|---------------------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|----------------------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 3 | 23 vs 24 Actual | VarianceValue | | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) | |
| 4 | % | VariancePcnt | | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) / Col-NA | |
| 5 | Enter Comments Here | Comments | | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 6 | Comments History | CommentsHistory | | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | Value | <input type="checkbox"/> | | | | |



On row 3, click on the **2nd Calc Factor** dropdown list. Make a selection. For this example, we will select **1**. Note: The 2nd Calc Factor menu lists the row # for the data source to create a formula. 1 in this example represents 2023 Actual.

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23 vs 24 Actual # 6 Primary BudgetID for Accounts List *

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Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | FormulaResolved | Threshold |
|-----------------|---------------------|-----------------|-------------|---------------------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|----------------------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 3 | 23 vs 24 Actual | VarianceValue | | Dec YTD | GLCode | 2 | | | Value | <input type="checkbox"/> | | | (Col2 - Col-NA) | |
| 4 | % | VariancePcnt | | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) / Col-NA | |
| 5 | Enter Comments Here | Comments | | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 6 | Comments History | CommentsHistory | | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | Value | <input type="checkbox"/> | | | | |



On row 3, click on the **3rd Calc Factor** dropdown list. Make a selection. For this example, we will select **1**. Note: The 3rd Calc Factor menu lists the sets of data created with variances and comments.

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Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | FormulaResolved | Threshold |
|-----------------|---------------------|-----------------|-------------|---------------------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|----------------------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 3 | 23 vs 24 Actual | VarianceValue | | Dec YTD | GLCode | 2 | 1 | | Value | <input type="checkbox"/> | | | (Col2 - Col1) | |
| 4 | % | VariancePcnt | | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) / Col-NA | |
| 5 | Enter Comments Here | Comments | | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 6 | Comments History | CommentsHistory | | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | Value | <input type="checkbox"/> | | | | |



Note: The 3rd Calc Factor menu is also used for the formula calculation for the "remaining to spend" data entry type option.

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| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | Formula Resolved | Threshold |
|-----------------|---------------------|-----------------|-------------|---------------------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|----------------------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 3 | 23 vs 24 Actual | VarianceValue | | Dec YTD | GLCode | 2 | 1 | | value | <input type="checkbox"/> | | | (Col2 - Col1) | |
| 4 | % | VariancePcnt | | Dec YTD | GLCode | | | | value | <input type="checkbox"/> | | | (Col-NA - Col-NA) / Col-NA | |
| 5 | Enter Comments Here | Comments | | Dec YTD | GLCode | | | | value | <input type="checkbox"/> | | | | |
| 6 | Comments History | CommentsHistory | | Dec YTD | GLCode | | | | value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | Value | <input type="checkbox"/> | | | | |



Copy the cells under 1st Calc Factor, 2nd Calc Factor, 3rd Calc Factor on row 3. Then Control C (to copy).

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| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | FormulaResolved | Threshold |
|-----------------|---------------------|-----------------|-------------|---------------------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|----------------------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 3 | 23 vs 24 Actual | VarianceValue | | Dec YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | | | (Col2 - Col1) | |
| 4 | % | VariancePcnt | | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) / Col-NA | |
| 5 | Enter Comments Here | Comments | | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 6 | Comments History | CommentsHistory | | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | Value | <input type="checkbox"/> | | | | |



Paste the selected cells. Click in the cell under **1st Calc Factor** from row 4. Then **shift, down arrow** to row 6.

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Column Layout Row Layout Accounts Search Filter

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|-----------------|---------------------|-----------------|-------------|---------------------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|----------------------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 3 | 23 vs 24 Actual | VarianceValue | | Dec YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | | | (Col2 - Col1) | |
| 4 | % | VariancePcnt | | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) / Col-NA | |
| 5 | Enter Comments Here | Comments | | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 6 | Comments History | CommentsHistory | | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | Value | <input type="checkbox"/> | | | | |



Now **Control V** (to paste).

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Column Layout Row Layout Accounts Search Filter

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| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period | Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | Formula Resolved | Threshold |
|-----------------|---------------------|-----------------|-------------|---------------|-------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|----------------------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec | YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | Dec | YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 3 | 23 vs 24 Actual | VarianceValue | | Dec | YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | | | (Col2 - Col1) | |
| 4 | % | VariancePcnt | | Dec | YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) / Col-NA | |
| 5 | Enter Comments Here | Comments | | Dec | YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | | | | |
| 6 | Comments History | CommentsHistory | | Dec | YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |

 Double-Click in the cell under background color for row 3.

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To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period | Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | Formula Resolved | Threshold |
|-----------------|---------------------|-----------------|-------------|---------------|-------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|----------------------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec | YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | Dec | YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 3 | 23 vs 24 Actual | VarianceValue | | Dec | YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | | | (Col2 - Col1) | |
| 4 | % | VariancePcnt | | Dec | YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) / Col-NA | |
| 5 | Enter Comments Here | Comments | | Dec | YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | | | | |
| 6 | Comments History | CommentsHistory | | Dec | YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |

 **Select a color.** In this example, we will select **yellow**.

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Reports > Custom Reports > Define Custom Reports

CompanyDB* DB3147_two18 Report 23 vs 24 Actual

Save Changes Add New Column Delete Report Add New Report Clone Report

23 vs 24 Actual # 6 Primary BudgetID for Accounts List * 23 vs 24 Actual Form Enabled

Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period Month / Yr | Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | Formula Resolved | Threshold |
|-----------------|---------------------|-----------------|-------------|--------------------------|-------------|-----------------|--------------|--------------------------|------------------|------------|----------------------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec YTD | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | Dec YTD | | | Value | <input type="checkbox"/> | | | | |
| 3 | 23 vs 24 Actual | VarianceValue | | Dec YTD | 1 | 1 | Value | <input type="checkbox"/> | | | (Col2 - Col1) | |
| 4 | % | VariancePcnt | | Dec YTD | 1 | 1 | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) / Col-NA | |
| 5 | Enter Comments Here | Comments | | Dec YTD | 1 | 1 | Value | <input type="checkbox"/> | | | | |
| 6 | Comments History | CommentsHistory | | Dec YTD | | | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | Value | <input type="checkbox"/> | | | | |

Color selection dialog box is open, showing Basic colors and Custom colors. The color yellow is selected.

Define Custom Colors >> OK Cancel



Click on **OK**

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File Budgets Variances Reports

Tools System Management Allocations Payroll Users Management

Reports > Custom Reports > Define Custom Reports

CompanyDB* DB3147_two18 Report 23 vs 24 Actual

Save Changes Add New Column Delete Report Add New Report Clone Report

23 vs 24 Actual # 6 Primary BudgetID for Accounts List * 23 vs 24 Actual Form Enabled

Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period Month / Yr | Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | Formula Resolved | Threshold |
|-----------------|---------------------|-----------------|-------------|--------------------------|-------------|-----------------|--------------|--------------------------|------------------|------------|----------------------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec YTD | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | Dec YTD | | | Value | <input type="checkbox"/> | | | | |
| 3 | 23 vs 24 Actual | VarianceValue | | Dec YTD | 1 | | Value | <input type="checkbox"/> | | | (Col2 - Col1) | |
| 4 | % | VariancePcnt | | Dec YTD | 1 | | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) / Col-NA | |
| 5 | Enter Comments Here | Comments | | Dec YTD | 1 | | Value | <input type="checkbox"/> | | | | |
| 6 | Comments History | CommentsHistory | | Dec YTD | | | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | Value | <input type="checkbox"/> | | | | |

Color

Basic colors:

Custom colors:

Define Custom Colors >>

OK Cancel

 Double-Click in the cell under background color for row 4.

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Reports > Custom Reports > Define Custom Reports

CompanyDB* DB3147_two18 Report 23 vs 24 Actual

Save Changes Add New Column Delete Report Add New Report Clone Report

23 vs 24 Actual # 6 Primary BudgetID for Accounts List *

23 vs 24 Actual ☐ Form Enabled ☐ Allow period as input ☐ Flip sign for Variances (Better/Worse for CR vs DR Accts)

Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period | Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | Formula Resolved | Threshold |
|-----------------|---------------------|-----------------|-------------|---------------|-------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|----------------------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec | YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | Dec | YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 3 | 23 vs 24 Actual | VarianceValue | | Dec | YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | FFFF80 | | (Col2 - Col1) | |
| 4 | % | VariancePcnt | | Dec | YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) / Col-NA | |
| 5 | Enter Comments Here | Comments | | Dec | YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | | | | |
| 6 | Comments History | CommentsHistory | | Dec | YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | | Value | <input type="checkbox"/> | | | | |

 **Select a color.** In this example, we will select **green**.

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Reports > Custom Reports > Define Custom Reports

CompanyDB* DB3147_two18 Report 23 vs 24 Actual

Save Changes Add New Column Delete Report Add New Report Clone Report

23 vs 24 Actual # 6 Primary BudgetID for Accounts List * 23 vs 24 Actual Form Enabled

Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period Month / Yr | Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | Formula Resolved | Threshold |
|-----------------|---------------------|-----------------|-------------|--------------------------|-------------|-----------------|--------------|--------------------------|------------------|------------|----------------------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec YTD | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | Dec YTD | | | Value | <input type="checkbox"/> | | | | |
| 3 | 23 vs 24 Actual | VarianceValue | | Dec YTD | | | Value | <input type="checkbox"/> | FFFF80 | | (Col2 - Col1) | |
| 4 | % | VariancePcnt | | Dec YTD | | | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) / Col-NA | |
| 5 | Enter Comments Here | Comments | | Dec YTD | | | Value | <input type="checkbox"/> | | | | |
| 6 | Comments History | CommentsHistory | | Dec YTD | | | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | Value | <input type="checkbox"/> | | | | |

Color selection dialog box showing Basic colors and Custom colors. The green color is selected.

Define Custom Colors >>

OK Cancel



Click on **OK**.

DynamicBudgets - PHUBERT\P. Hubert - 184.172.195.139,25000 - DB3147_dynamicbudgets

File Budgets Variances Reports

Tools System Management Allocations Payroll Users Management

Reports > Custom Reports > Define Custom Reports

CompanyDB* DB3147_two18 Report 23 vs 24 Actual

Save Changes Add New Column Delete Report Add New Report Clone Report

23 vs 24 Actual # 6 Primary BudgetID for Accounts List * 23 vs 24 Actual Form Enabled

Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period Month / Yr | Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | FormulaResolved | Threshold |
|-----------------|---------------------|-----------------|-------------|--------------------------|-------------|-----------------|--------------|--------------------------|------------------|------------|----------------------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec | YTD | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | Dec | YTD | | Value | <input type="checkbox"/> | | | | |
| 3 | 23 vs 24 Actual | VarianceValue | | Dec | YTD | | Value | <input type="checkbox"/> | FFFF80 | | (Col2 - Col1) | |
| 4 | % | VariancePcnt | | Dec | YTD | | Value | <input type="checkbox"/> | | | (Col-NA - Col-NA) / Col-NA | |
| 5 | Enter Comments Here | Comments | | Dec | YTD | | Value | <input type="checkbox"/> | | | | |
| 6 | Comments History | CommentsHistory | | Dec | YTD | | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | Value | <input type="checkbox"/> | | | | |

Color

Basic colors:

Custom colors:

Define Custom Colors >>

OK Cancel



Note: These are the colors we selected. Sometimes you will not see the colors selected until you save changes.

DynamicBudgets - PHUBERT\P. Hubert - 184.172.195.139,25000 - DB3147_dynamicbudgets

File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Reports > Custom Reports > Define Custom Reports

CompanyDB* DB3147_two18 Report 23 vs 24 Actual

Save Changes Add New Column Delete Report Add New Report Clone Report

23 vs 24 Actual # 6 Primary BudgetID for Accounts List *

23 vs 24 Actual ☐ Form Enabled ☐ Allow period as input ☐ Flip sign for Variances (Better|Worse for CR vs DR Accts)

Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | FormulaResolved | Threshold |
|-----------------|---------------------|-----------------|-------------|---------------------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|----------------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 3 | 23 vs 24 Actual | VarianceValue | | Dec YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | FFFF80 | | (Col2 - Col1) | |
| 4 | % | VariancePcnt | | Dec YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | 30FF80 | | (Col2 - Col1) / Col1 | |
| 5 | Enter Comments Here | Comments | | Dec YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | | | | |
| 6 | Comments History | CommentsHistory | | Dec YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | Value | <input type="checkbox"/> | | | | |



Note: These are the formulas for rows 3 and 4 based upon the Calc Factors we selected. We created the formulas 2024-2023 actuals variance value and 2024-2023 variance %.

DynamicBudgets - PHUBERT\P. Hubert - 184.172.195.139,25000 - DB3147_dynamicbudgets

File Budgets Variances Reports

Tools System Management Allocations Payroll Users Management

Reports > Custom Reports > Define Custom Reports

CompanyDB* DB3147_two18 Report 23 vs 24 Actual

Save Changes Add New Column Delete Report Add New Report Clone Report

23 vs 24 Actual # 6 Primary BudgetID for Accounts List *

23 vs 24 Actual

☒ Form Enabled ☐ Allow period as input ☐ Flip sign for Variances (Better|Worse for CR vs DR Accts)

Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | FormulaResolved | Threshold |
|-----------------|---------------------|-----------------|-------------|---------------------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|----------------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 3 | 23 vs 24 Actual | VarianceValue | | Dec YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | FFFF80 | | (Col2 - Col1) | |
| 4 | % | VariancePcnt | | Dec YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | 80FF80 | | (Col2 - Col1) / Col1 | |
| 5 | Enter Comments Here | Comments | | Dec YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | | | | |
| 6 | Comments History | CommentsHistory | | Dec YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | Value | <input type="checkbox"/> | | | | |



Click on **Save Changes.**

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File Budgets Variances Reports

Tools System Management Allocations Payroll Users Management

Reports > Custom Reports > Define Custom Reports

CompanyDB* DB3147_two18 Report 23 vs 24 Actual

Save Changes Add New Column Delete Report Add New Report Clone Report

23 vs 24 Actual # 6 Primary BudgetID for Accounts List *

23 vs 24 Actual

☒ Form Enabled ☐ Allow period as input ☐ Flip sign for Variances (Better/Worse for CR vs DR Accts)

Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | Formula Resolved | Threshold |
|-----------------|---------------------|-----------------|-------------|---------------------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|----------------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 3 | 23 vs Actual | VarianceValue | | Dec YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | FFFF80 | | (Col2 - Col1) | |
| 4 | % | VariancePcnt | | Dec YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | 80FF80 | | (Col2 - Col1) / Col1 | |
| 5 | Enter Comments Here | Comments | | Dec YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | | | | |
| 6 | Comments History | CommentsHistory | | Dec YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | Value | <input type="checkbox"/> | | | | |



To Recap: We have created a custom report named 23 vs 24 Actual. It compares 2023 Actual to 2024 Actual, calculates the variance amount and variance %. You will also be able to view any comments entered monthly or all comments for the fiscal period.

| Column Name | Data Entry Type | BudgetID | Fiscal Period | Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden <input type="checkbox"/> | BackgroundColor | Text Color | FormulaResolved |
|---------------------|-----------------|----------|---------------|-------------|--------------|-----------------|-----------------|-----------------|--------------|---------------------------------|-----------------|------------|----------------------|
| 2023 Actual | ReadOnly | 2023 Act | Dec | YTD | GLCode | | | | Value | <input type="checkbox"/> | | | |
| 2024 Actual | ReadOnly | 2024 Act | Dec | YTD | GLCode | | | | Value | <input type="checkbox"/> | | | |
| 23 vs 24 Actual | VarianceValue | | Dec | YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | FFFF80 | | (Col2 - Col1) |
| % | VariancePcnt | | Dec | YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | 80FF80 | | (Col2 - Col1) / Col1 |
| Enter Comments Here | Comments | | Dec | YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | | | |
| Comments History | CommentsHistor | | Dec | YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | | | |



Note: **This is the custom report** we created named 23 vs 24 Actual. It compares 2023 Actual to 2024 Actual, calculates the variance amount and % with the ability to view comments entered monthly or for the fiscal period.

Reports > Custom Reports > Custom Reports

CompanyDB*: DB3147_two18 OrgUnit Rollup: <all> Object RollUp: <all> Report: 23 vs 24 Actual

OrgUnit: <all> Object: <all> Search Advanced ☐ Exclude zero value accounts

Select Month: <per rpt setup> ☐ Show Simple Comments ☐ Show Comments to date

Accounts highlighted are itemized, click the account number link to edit line items

Dashboard Account Details

CompanyDB: DB3147_two18 BudgetID:

Print Export to Excel Print to PDF AutoSize Columns

Display Level: 4 Row Format: <No Format> Hide Extended Column Header

| AccountNum | AccountDescr | 2023 Actual | 2024 Actual | 23 vs 24 Actual | % | Enter Comments Here | Comments History |
|-------------|-------------------------------------|-------------|-------------|-----------------|-----------|---------------------|---|
| 000-4110-02 | US Sales - Finished Goods | 85,643.34 | 79,604.49 | (6,038.85) | -7.05 % | | [03/06/2018 12:48] [PHUBERT.P. Hubert] [\$6K] Jan - Comments Test |
| 000-4111-01 | Canadian Sales - Retail/Parts | 45,208.55 | 45,208.55 | - | 0.00 % | | |
| 000-4111-02 | Canadian Sales - Finished Goods | - | - | - | 0.00 % | | |
| 000-4112-01 | AustralAsian Sales - Retail/Parts | 96,936.57 | 96,936.57 | - | 0.00 % | | |
| 000-4112-02 | AustralAsian Sales - Finished Goods | 6,290.65 | 6,290.65 | - | 0.00 % | | |
| 000-4114-01 | Germany Sales - Retail/Parts | 5,114.74 | - | (5,114.74) | -100.00 % | | |
| 000-4114-02 | Germany Sales - Finished Goods | - | - | - | 0.00 % | | |
| 000-4115-01 | United Kingdom Sales - Retail/Parts | 894.12 | 894.12 | - | 0.00 % | | |
| 000-4115-02 | United Kingdom Sales - Finished Go | 6,542.12 | 6,542.12 | - | 0.00 % | | |
| 000-4116-01 | South Africa - Retail/Parts | 5,034.33 | 5,034.33 | - | 0.00 % | | |



Click on the X to close.

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Reports > Custom Reports > Define Custom Reports

CompanyDB* DB3147_two18 Report 23 vs 24 Actual

Save Changes Add New Column Delete Report Add New Report Clone Report

23 vs 24 Actual # 6 Primary BudgetID for Accounts List *

23 vs 24 Actual ☐ Form Enabled ☐ Allow period as input ☐ Flip sign for Variances (Better/Worse for CR vs DR Accts)

Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

| Column Position | Column Name | Data Entry Type | BudgetID | Fiscal Period Month / YTD | Report Level | 1st Calc Factor | 2nd Calc Factor | 3rd Calc Factor | NumberFormat | Hidden | Background Color | Text Color | Formula Resolved | Threshold |
|-----------------|---------------------|-----------------|-------------|---------------------------|--------------|-----------------|-----------------|-----------------|--------------|--------------------------|------------------|------------|----------------------|-----------|
| 1 | 2023 Actual | ReadOnly | 2023 Actual | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 2 | 2024 Actual | ReadOnly | 2024 Actual | Dec YTD | GLCode | | | | Value | <input type="checkbox"/> | | | | |
| 3 | 23 vs 24 Actual | VarianceValue | | Dec YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | FFFF80 | | (Col2 - Col1) | |
| 4 | % | VariancePcnt | | Dec YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | 80FF80 | | (Col2 - Col1) / Col1 | |
| 5 | Enter Comments Here | Comments | | Dec YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | | | | |
| 6 | Comments History | CommentsHistory | | Dec YTD | GLCode | 2 | 1 | 1 | Value | <input type="checkbox"/> | | | | |
| 7 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 8 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 9 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 10 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 11 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 12 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 13 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 14 | | | | | | | | | Value | <input type="checkbox"/> | | | | |
| 15 | | | | | | | | | Value | <input type="checkbox"/> | | | | |



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