

## Variances/Percentages – FIS Example

*Goal: Create a report with a variance showing whether you have underspent or overspent your budget, and calculating the percentage by which your budget is under or overspent*

Navigate to the MFY - Operating Ledger window and open the MFY Operating Ledger object

Select Report Category, Report Category Title, Acct, Acct Title, SUM Per 14 Ytd Bud DR, SUM Per 14 Ytd Dr, SUM Per 14 Ytd Enc Dr, SUM Per 14 Ytd Avail Bal Dr

Qualify FY = 00, Index = Input your index here

Sort by Report Category, Acct

Submit query

Move the results into a GQL Standard Report

Change the page orientation to Landscape

Resize the columns and then reorder them to move Report Category Title after Report Category, and move Acct Title after Acct

Create calculated column showing Percent of budget spent:

$$((\text{Ytd Dr} + \text{Enc Dr}) / \text{Bud Dr}) * 100$$

Notice that since budgeting isn't usually done at the individual account level, the percentages aren't very useful, especially where either the budget or the amount spent is zero

Subtotal on Report Category, summing amount columns

Add borders to the report, especially on the subtotal row

Notice that summing the percentages provides inaccurate results

Hide the calculated numbers by changing the font color to be the same color as the report background, or change the calculation from " $((\text{Ytd Dr} + \text{Enc Dr}) / \text{Bud Dr}) * 100$ " to "0" and format the column to not display zeros

Create a calculation in the subtotal row and format the amount to display as a percentage:

$$(((\text{Sum of SUM Per 14 YTD Dr by Rpt Category}) + (\text{Sum of SUM Per 14 YTD Enc Dr by Rpt Category})) / (\text{Sum of SUM Per 14 YTD Bud Dr by Rpt Category})) * 100$$

## Variations/Percentages – HRIS Example

*Goal: Create a report estimating the effect for your department of a 2% pay raise in April for classified staff's jobs*

Navigate to the HRIS model window

From the person object, select PIDM (we'll use that instead of name to indicate a specific individual so that we don't associate people's salaries with specific people)

From the Jobs object, select Position Number, Job Suffix, Assignment Salary

From the Pay object, select Index, Acct, SUM March Amt

Qualify NOT Job End Date < {sysdate}, or Job End Date IS NULL, and group those two attributes together. Also qualify Timesheet Org = Input your major org here, and Employee Class – JOBS begins with C, and Calendar Year = 2000

Sort by PIDM, Position Number, Job Suffix, Index, Acct

Submit query

Move the results into a GQL Standard Report

Resize the columns

Create calculated column showing Est salary for Apr to June:  
[March Amt] \* 3

Create calculated column showing Est salary for Apr to June with 2% raise:  
([March Amt] \* 3)\*1.02

Create a calculated column showing the variance in costs for a 2% raise:  
[Apr to Jun w/ 2% raise] - [Current Apr to Jun]