

Staff Project Budget To Actual

Purpose of this Report

The Staff Project Budget to Actual report shows budget versus actual project hours and amounts for staff. Managers can use this report to review project budgets vs. actual and the difference (variance) by staff assigned.

Permissions Required to Access this Report

For the security group the user is assigned to they must have [View Permissions](#) for these areas:

Workstream under Functional Rights-Reports-Firm Library

Client Profile under Functional Rights-Administration Manager-Client

Reports in Foundation that are Comparable

In Practice Management, the comparable report is Employee Budget to Actual.

In Practice Advantage, the comparable report is Project/Task Budget Report.

Report Specifications

The following report options and data selections are available to determine the report contents.

Options and Settings:

Show Hours	Yes/No	Show or hide the Actual Hours, Budget Hours, and Hours Variance columns.
Show Amounts	Yes/No	Show or hide the Actual Amount, Budget Amount, and Amount Variance columns.
Show Workstep	Yes/No	Show or hide the workstep information.
Include Deleted Clients	Yes/No	Shows or hides the deleted clients informations.

Default Data Selections:

Project Status	In	All
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Optional Data Selections:

Actual Amount	Project Actual Finish	Project Name
Actual Hours	Project Actual Start	Project Office
Amount Variance	Project Bill Manager	Project On Hold
Area of Expertise	Project Business Unit	Project On Hold as of Date
Budget Amount	Project Complexity	Project Original Due Date
Budget Hours	Project Delivery Method	Project Original Planned Finish
Client	Project Extension 1 Date	Project Planned Finish
Department	Project Extension 2 Date	Project Planned Start
Est Percentage Complete Per Est Hours	Project File Holder	Project Priorities
Estimate Percentage Complete Per Budget	Project Frequency	Project Prospective
Hours Variance	Project ID	Project Region
Project	Project Missed Dates	Project Status

Optional Data Selections Continued:

Project Team	Staff	Staff Region
Project Template	Staff Business Unit	Staff Reporting Manager
Project Type	Staff ID	Working Out of Drawer
Report Name	Staff Name	Workstep
Roles	Staff Office	
Skill Level	Staff Position	

Grouping:

Client	Project Office	Staff Business Unit
Department	Project Region	Staff ID
Project	Project Status	Staff Name
Project Business Unit	Project Team	Staff Office
Project File Holder	Project Template	Staff Position
Project Frequency	Project Type	Staff Region
Project ID	Report Name	Staff Reporting Manager
Project Name	Staff	

Sorting:

Actual Amount	Budget Hours	Staff
Actual Hours	Client	Workstep
Amount Variance	Hours Variance	Workstep Order
Budget Amount	Project	

Fields that are displayed on this report:

Staff	The staff that is assigned to the workstep. The format is Last Name, First Name (Staff ID).
Client	The client that the project is assigned to. The format is Client Sort Name (Client ID.Sub ID).
Project	The name of the project. The format is Project Name (Project ID).
Workstep	The name of the workstep. The format is Workstep Name (Workstep ID).
Workstep Order	The order the worksteps are on the project.
Actual Hours	The number of hours that were actually worked on the project or workstep.
Budget Hours	The number of hours that were budgeted for the project or workstep.
Hours Variance	The budgeted hours minus actual hours.
Actual Amount	The amount actually spent on the project or workstep.
Budget Amount	The budgeted amount for the project or workstep.
Amount Variance	The budgeted amount minus actual amount.

ProSystem fx Practice SaaS
 Staff Project Budget To Actual

Project	Workstep	Actual Hours	Budget Hours	Hours Variance	Actual Amount	Budget Amount	Amount Variance
Staff: Doe, Jane F (JFD)							
Client: ABC Inc (1000.001)							
1040-2012 (1040-2012)	Gather Information (INFO)	527.50	35.00	(492.50)	1,425.00	600.00	(825.00)
	Doe, Jane F (JFD) Subtotal:	1,025.50	70.00	(955.50)	\$525.00	\$1,400.00	\$875.00
	Grand Totals:	1,025.50	70.00	(955.50)	\$525.00	\$1,400.00	\$875.00