

Over Budget Tasks

Description: This report provides a quick way to see tasks that are over their budgeted amount by more than 5%. To show up on the report the task must meet the following criteria:

- The task must have any tracking description besides “Not Started”
- The task must be over the budgeted amount by more than 5%
- The task must not have a budgeted amount of \$0.
- The task must fall within the report settings you specified for “Detail line” date range and “Based on” criteria.

Notes

- Tasks that are 10-15% over budget will have a yellow exclamation point icon next to them.
- Tasks that are more than 15% over budget will have a red exclamation point icon next to them.
- No Grouping Headers are displayed on this report so Grouping is not recommended.
- Filtering can provide a good way to see trends on a particular client or staff.
- Use this report to quickly identify tasks over budget.