

Adaptive Live | 2018

Custom Display As

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Custom Display As

What will we be covering?

- Display as a percentage
- Display as a percent of total
- Customize time in columns by version
- Trailing 3 months

What is the benefit for you?

- Display percentages of signs for variances differently based upon account type or attribute in reports
- Leverage the power of this for reporting

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Let's Take a Deeper Look!

Live Demo

Display as a percent of different denominators

Custom Display As allows users to set different denominators based upon the row characteristics (ie. attribute, account, code, etc.)

```
if(search(this.account.code,"revenue")>0,
```

```
(ACCT.this/ACCT.4000_Revenue)*100,
```

```
(ACCT.this/ACCT.6000_Operating_Expenses)*100)
```

Accounts	FY2016	
	Value	Custom
<input type="checkbox"/> 4000 Revenue		
<input type="checkbox"/> 4100 Product Revenue	3,471,878	27
<input type="checkbox"/> 4200 Services Revenue	8,940,824	70
<input type="checkbox"/> 4300 Maintenance Revenue	349,302	3
Total 4000 Revenue	12,762,004	100
<input type="checkbox"/> 6000 Operating Expenses		
<input type="checkbox"/> 6100 Payroll	7,063,586	78
<input type="checkbox"/> 6200 Taxes & Benefits	1,575,349	18
<input type="checkbox"/> 6300 Office Expenses	264,767	3
<input type="checkbox"/> 6400 Travel & Entertainment	40,648	0
<input type="checkbox"/> 6500 Marketing	47,464	1
6999 Other Expense	9,504	0
Total 6000 Operating Expenses	9,001,318	100

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Display as a percent of total

For levels, see the percentage of total.

$(ACCT.This/ACCT.This[|level=United States(+)]) * 100$

	6100 Payroll	
	FY2016	
Levels	Value	Custom
<input type="checkbox"/> United States (Rollup)		
Sales - North	208,960	25
Sales - South	113,956	14
Sales - East	35,704	4
Sales - West	42,699	5
Services - East	120,434	14
Services - West	167,120	20
Support	147,479	18
Total United States (Rollup)	836,352	100

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Customize time in columns by version

Custom Display As allows define different time based upon version in the report

- In this example, we used a complicated formula to determine what time period we are showing in the report

```
if (search(this.version.name,"working budget")>0, ACCT.this[time=2016],  
# this will show the whole year for any version whose name contains  
budget
```

```
  if (this.version.name = "actuals", ACCT.this[time=01/2016:this],  
# But YTD (start of year to "this) for the actuals version
```

```
    if (month(this) = 12, 0, ACCT.this[time=this+1:12/2016] )))  
# other versions (e.g. Commitments) sum all months after this to the end of  
the year
```

Time Feb-2016				
Custom				
Feb-2016				
Accounts	Working Budget	Actuals	Forecast	Remaining Budget
6000 Operating Expenses				
6100 Payroll	21,401,365	3,559,222	17,988,026	-145,883
6200 Taxes & Benefits	4,637,597	791,051	3,757,028	89,517
6300 Office Expenses	962,060	126,397	634,129	201,534
6400 Travel & Entertainment	81,209	28,669	60,552	-8,013
6500 Marketing	153,260	22,588	130,470	203
6999 Other Expense	23,000	6,504	13,000	3,496
Total 6000 Operating Expenses	27,258,490	4,534,431	22,583,206	140,853

Custom Display As for TTM

- Leverage the Custom Display As element and the Power of THIS to create a trailing 3 month report that is parameterized.

- ACCT.this[time=this-2:this]
- ACCT.this[time=this-11:this]

Accounts	Trailing 3 months		Trailing 12 months	
	Working Budget	Actuals	Working Budget	Actuals
[-] 6000 Operating Expenses				
[+] 6100 Payroll	5,283,275	5,296,507	20,389,688	20,439,693
[+] 6200 Taxes & Benefits	1,196,213	1,182,294	4,545,773	4,478,658
[+] 6300 Office Expenses	280,807	196,922	865,053	781,837
[+] 6400 Travel & Entertainment	26,737	19,273	82,742	89,333
[+] 6500 Marketing	36,865	35,172	137,996	136,640
6999 Other Expense	9,000	6,060	13,572	10,076
Total 6000 Operating Expenses	6,832,898	6,736,229	26,034,824	25,936,237

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