Accessing the Payroll Projection Dashboard

Log into Summit and click on the down arrow by Dashboards for the dropdown list. Select Payroll Projection from the list.
Page Prompts

Data will automatically load for the current Fiscal Period and for all departments available to you based upon your security.

To limit that data or to change the Fiscal Through Period, use the Prompt box on the left side of the dashboard.

**Through Fiscal Period** – Determines the ending Fiscal Year and Fiscal Period (month) for the data displayed.

**Dept Tree Level/Dept Level Nodes** – To display a high level department, school, MBU, or executive level, choose the level you wish to view in the **Dept Tree Level** box. Then choose the appropriate node in **Dept Level Nodes** filter box. Click outside of the popup box when you are finished with your selection.

**DeptID** – To limit the output to certain DeptID’s, choose from the list of DeptIDs in the **DeptID** filter box. To select all, leave blank. Click outside of the popup box when you are finished with your selection.

**Fund** – To limit the output to certain Funds, choose from the list of Funds in the **Fund** filter box. To select all, leave blank. Click outside of the popup box when you are finished with your selection.
Click on Apply to return results. Results will appear to the right.

**Viewing the Summarized Data**

By default, the payroll data appears summarized by Account Group. There are four additional ways to view the data in this report. If you click on the down arrow in the view selector box, you will see the options.
The alternative views display the data by the specified chartfield(s) as well as the Payroll Account Group. Below is an example of the **By Fund** view.

![Through Fiscal Period](image)

Viewing the Detail Data

To view the payroll data in detail (by employee, chartstring and account) click on any of the blue hyperlinks on the summary page. Clicking on the Fund, DeptID or Project ID will return all of the payroll detail for the given chartfield. Clicking on a Payroll Account Group hyperlink will bring you to the intermediate page displayed below.

![Summary](image)

The payroll account page allows you to drill into an individual Account ID or the entire Payroll Account Group. Drilling on the Account ID will return detail for that account only. Drilling on the Payroll Account Group will return detail data...
for all accounts contained within that group. Below is an example of the detail after drilling on the AA Regular Employee Comp Payroll Account Group. Additional fields are viewable in Summit by scrolling to the right.

Fields are sortable by hovering over the field name then clicking on the Sort Ascending or Sort Descending arrow.

**Downloading and Printing the Data**

Like all Summit dashboards, the Payroll Projection reports can be downloaded to Excel, PDF or Powerpoint. Scroll to the bottom of the page and click on the Export link.