



# SUMMIT Job Aid

## Payroll Projection Dashboard

### University of Massachusetts Amherst

#### 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.

The screenshot shows the Oracle Business Intelligence interface. The top navigation bar includes the Oracle logo, 'Business Intelligence', and a 'Sign Out' button. The main content area is divided into sections: 'Home', 'Browse/Manage...', 'Get Started...', 'Recent', 'Dashboards', 'Others', and 'Most Popular'. The 'Dashboards' section is expanded, showing a dropdown menu with various report categories. The 'Payroll Projection' item is circled in red. The categories visible in the dropdown are: AMH Reports, FDM Reports, Global Reports, HCM Reports, Payroll Projection, and Summit Leads. The 'Payroll Projection' category is currently selected and highlighted.

## Page Prompts

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

Through Fiscal Period	Dept Level Node(s)	
2014-01 (Jul, 2013)	AALL000000 - Amherst Campus	

	Paid YTD	Encumbered	Total	Budget	Balance
Payroll Account Group					
Payroll Other	0.00	0.00	0.00	2,880,839.00	2,880,839.00
AA Regular Employee Comp	13,566,370.11	300,559,124.54	314,125,494.65	28,713,641.00	(285,411,853.65)
CC Special Employee Comp	2,255,954.41	13,063,936.54	15,319,890.95	20,990,455.00	5,670,564.05
Fringe Benefits Other	0.00	0.00	0.00	6,830,306.00	6,830,306.00
DD Pension and Insurance	1,180,786.10	27,550,262.12	28,731,048.22	1,206,910.00	(27,524,138.22)
GEO Health Insurance	(889.33)	0.00	(889.33)	173,727.00	174,616.33
<b>Grand Total</b>	<b>17,002,221.29</b>	<b>341,173,323.20</b>	<b>358,175,544.49</b>	<b>60,795,878.00</b>	<b>(297,379,666.49)</b>

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.

**Prompts**

**Through Fiscal Period**  
2014-02 (Aug, 2013) ▾

**Dept Tree Level**  
Major Budget Unit ▾

**Dept Level Nodes**  
[Redacted] ▾

**DeptID**  
--Select Value-- ▾

**Fund**  
--Select Value-- ▾

Apply Reset ▾

**Payroll Projection**

The data is as of **August 04, 2013**

[Scenario Builder](#) Time run: 8/5/2013 10:03:52 AM

Through Fiscal Period    Dept Level Node(s)

2014-02 (Aug, 2013)    [Redacted]

Summary ▾

Payroll Account Group ▾	Paid YTD	Encumbered	Total	Budget	Balance
AA Regular Employee Comp	584,403.27	6,620,966.21	7,205,369.48	7,674,957.26	469,587.78
CC Special Employee Comp	52,531.37	74,380.02	126,911.39	450,000.00	323,088.61
Fringe Benefits Other	0.00	0.00	0.00	131,627.22	131,627.22
DD Pension and Insurance	13,502.96	137,929.07	151,432.03	0.00	(151,432.03)
Grand Total	650,437.60	6,833,275.30	7,483,712.90	8,256,584.48	772,871.58

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### 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.

**Payroll Projection**

The data is as of **August 04, 2013**

[Scenario Builder](#) Time run: 8/5/2013 10:03:52 AM

Through Fiscal Period    Dept Level Node(s)

2014-02 (Aug, 2013)    [Redacted]

Summary ▾

- Summary
- By Fund
- By DeptID
- By Fund/DeptID
- By Fund/DeptID/Project

Payroll Account Group ▾	Paid YTD	Encumbered	Total	Budget	Balance
AA Regular Employee Comp	584,403.27	6,620,966.21	7,205,369.48	7,674,957.26	469,587.78
CC Special Employee Comp	52,531.37	74,380.02	126,911.39	450,000.00	323,088.61
Fringe Benefits Other	0.00	0.00	0.00	131,627.22	131,627.22
DD Pension and Insurance	13,502.96	137,929.07	151,432.03	0.00	(151,432.03)
Grand Total	650,437.60	6,833,275.30	7,483,712.90	8,256,584.48	772,871.58

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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	Dept Level Node(s)
2014-02 (Aug, 2013)	

By Fund

Fund	Payroll Account Group	Paid YTD	Encumbered	Total	Budget	Balance
51342 - General Operating Funds	AA Regular Employee Comp	731.83	0.00	731.83	0.00	(731.83)
	CC Special Employee Comp	45,769.56	55,785.06	101,554.62	450,000.00	348,445.38
	DD Pension and Insurance	708.60	3,446.76	4,155.36	0.00	(4,155.36)
51369 - General Operating Funds - 2	AA Regular Employee Comp	573,933.00	6,545,612.50	7,119,545.50	7,674,957.26	555,411.76
	Fringe Benefits Other	0.00	0.00	0.00	131,627.22	131,627.22
	DD Pension and Insurance	9,814.27	111,929.94	121,744.21	0.00	(121,744.21)
53105 - Federal Direct G&C Level 5	AA Regular Employee Comp	211.50	509.16	720.66	0.00	(720.66)
	CC Special Employee Comp	660.00	0.00	660.00	0.00	(660.00)
	DD Pension and Insurance	73.84	144.09	217.93	0.00	(217.93)
53106 - Federal Direct G&C Level 6	AA Regular Employee Comp	5,377.81	22,903.61	28,281.42	0.00	(28,281.42)
	CC Special Employee Comp	1,813.10	18,594.96	20,408.06	0.00	(20,408.06)
	DD Pension and Insurance	1,606.95	7,880.40	9,487.35	0.00	(9,487.35)
53500 - Private Gifts	AA Regular Employee Comp	4,149.13	51,940.94	56,090.07	0.00	(56,090.07)
	CC Special Employee Comp	4,288.71	0.00	4,288.71	0.00	(4,288.71)
	DD Pension and Insurance	1,299.30	14,527.88	15,827.18	0.00	(15,827.18)
<b>Grand Total</b>		<b>650,437.60</b>	<b>6,833,275.30</b>	<b>7,483,712.90</b>	<b>8,256,584.48</b>	<b>772,871.58</b>

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### 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

Payroll Account Group	Account ID - Desc	Paid YTD	Encumbered	Total	Budget	Balance
AA Regular Employee Comp	700821 - AA Employee Compensation	0.00	0.00	0.00	9,998,786.67	9,998,786.67
	711000 - Salaries: Regular	320,774.44	8,432,906.36	8,753,680.80	0.00	(8,753,680.80)
	711900 - Shift Differential Pay	131.58	0.00	131.58	0.00	(131.58)
	712300 - Overtime Pay	4,367.36	0.00	4,367.36	0.00	(4,367.36)
	714200 - Bonus Pay & Awards	17,944.62	46,173.19	64,117.81	0.00	(64,117.81)
	715400 - Research Actv Smr Salary	114,910.71	0.00	114,910.71	0.00	(114,910.71)
<b>Grand Total</b>		<b>458,128.71</b>	<b>8,479,079.55</b>	<b>8,937,208.26</b>	<b>9,998,786.67</b>	<b>1,061,578.41</b>

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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.

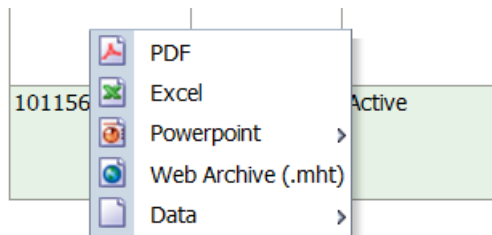
Employee ID	Employee Record	Employee Record Status	Employee Name	Employee Type	Employee Classification Desc	YTD Actuals Amount	YTD Encumbrance Balance	YTD Total	Encumbrance End Date	Step Entry Date	Business Title	Jobcode ID	Job Title	FTE	Rate Type	Rate	Fund
	0	Active		Excep Hrly	Professional	211.50	509.16	720.66	09/30/2013			90238		1.00	Annual	57,026.32	53105 - Federal Direct G&C Level 5
	0	Active		Excep Hrly	Professional	4,884.15	60,780.48	65,664.63	06/28/2014			IP01D		1.00	Annual	65,845.52	51369 - General Operating Funds - 2
	0	Active		Excep Hrly	Classified	3,375.34	42,516.30	45,891.64	06/30/2014	07/08/2013		14X24		1.00	Annual	45,786.78	51369 - General Operating Funds - 2
	0	Active		Excep Hrly	Classified	4,257.95	53,303.32	57,561.27	06/30/2014	03/02/2006		16X08		1.00	Annual	57,403.58	51369 - General Operating Funds - 2
	0	Active		Excep Hrly	Professional	4,188.82	52,437.56	56,626.38	06/30/2014			90238		1.00	Annual	56,471.22	51369 - General Operating Funds - 2
	0	Active		Excep Hrly	Classified	3,780.84	47,330.62	51,111.46	06/30/2014	10/02/2011		14X24		1.00	Annual	50,971.44	51369 - General Operating Funds - 2
	6	Active		Excep Hrly	Professional	3,193.11	1,655.68	4,848.79	06/30/2014	07/01/2012		UA01B		1.00	Annual	43,047.68	51369 - General Operating Funds - 2
	0	Leave W/Py		Excep Hrly	Professional	5,073.03	63,506.82	68,579.85	06/30/2014			90239		1.00	Annual	68,391.96	51369 - General Operating Funds - 2

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

Employee ID	Employee Record	Employee Record Status	Employee Name	Employee Type	Employee Classification Desc	YTD Actuals Amount	YTD Encumbrance Balance	YTD Total	Encumbrance End Date	Step Entry Date	Business Title	Jobcode ID	Job Title
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### 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.



[Return](#) - [Export](#)