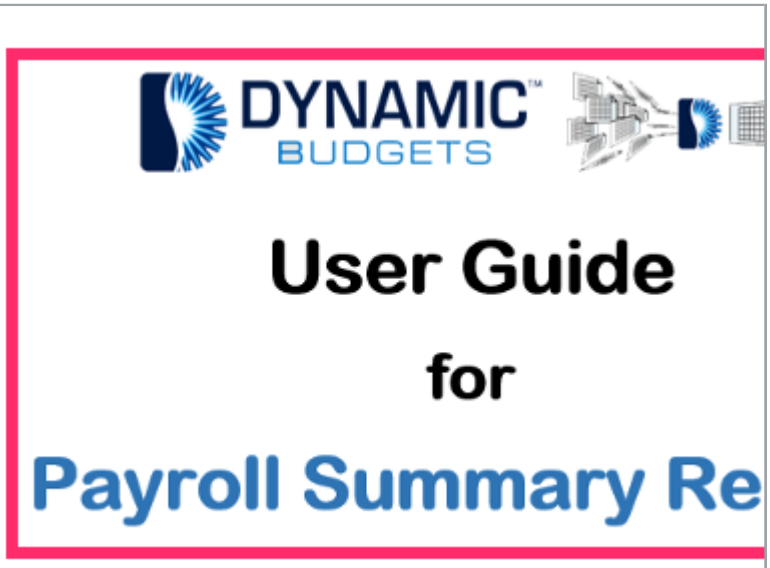
1

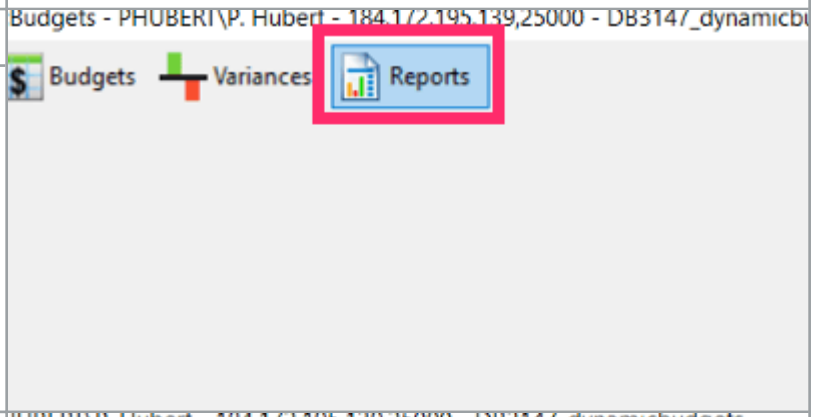
Dynamic Budgets User guide for Payroll Summary Report




2

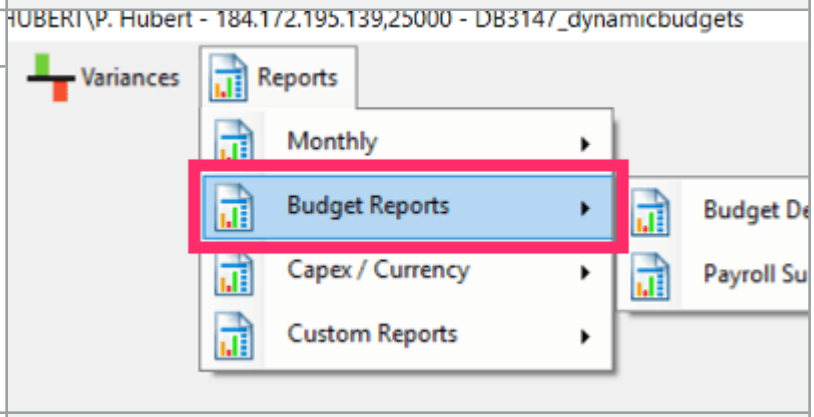
We are going to review the Payroll Summary Report.

Let's get started. Click on Reports.



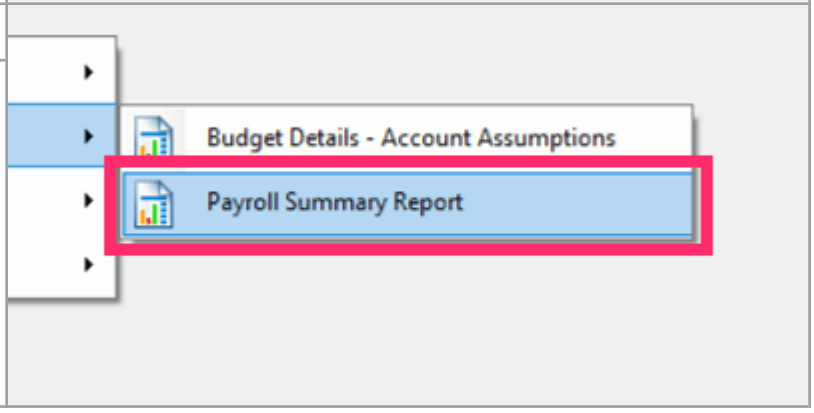

3

Click on Budget Reports.




4

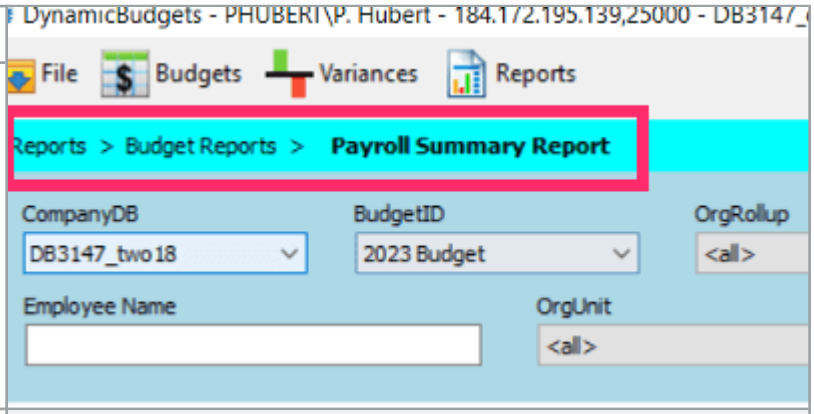
Click on Payroll Summary Report.



Note: As a reminder, this path shows you how to get to this screen again.

In this example, you would go to the Reports menu, Budget Reports then Payroll Summary Report.

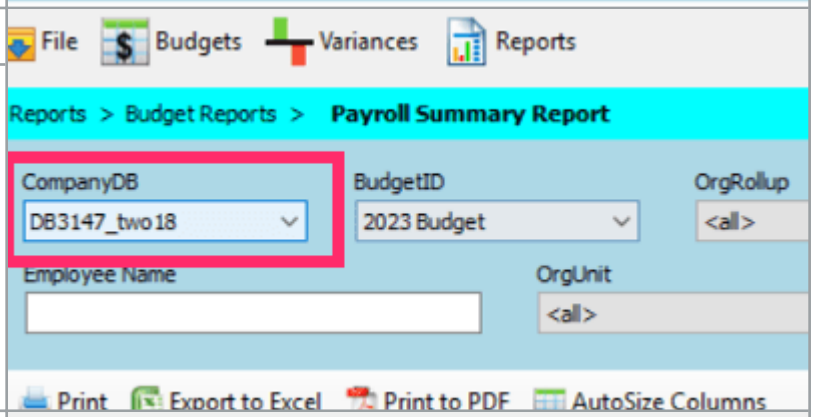
5




Click on the CompanyDB dropdown list. Make your selection.

In this example, select DB3147_two18.

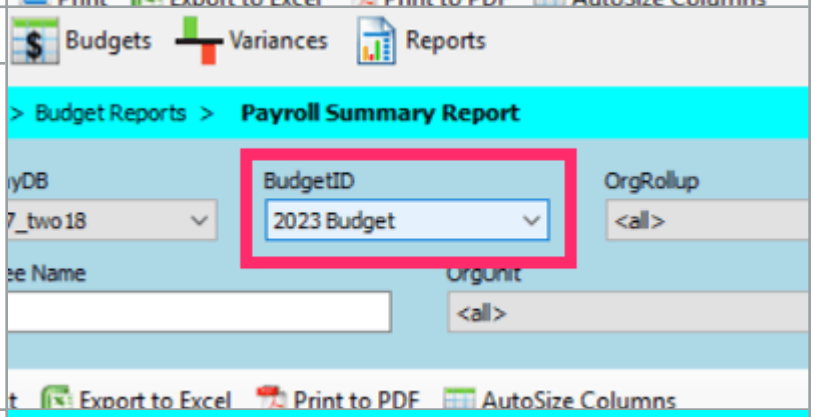
6




Click on the BudgetID dropdown list. Make your selection.

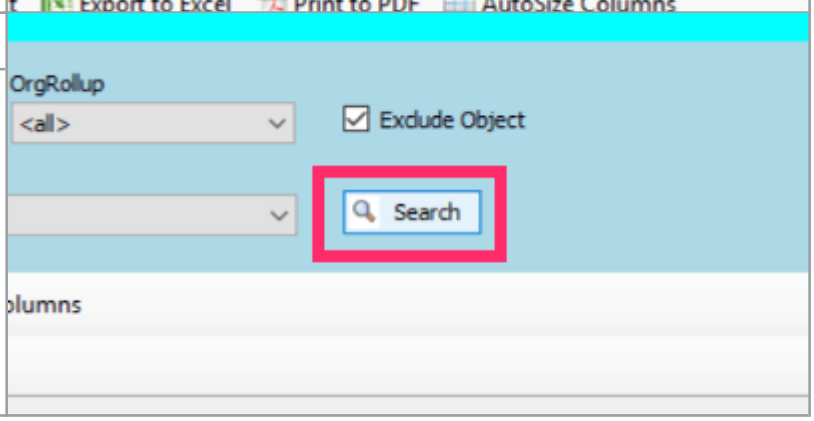
In this example, select 2023 Budget.

7




Click on Search.

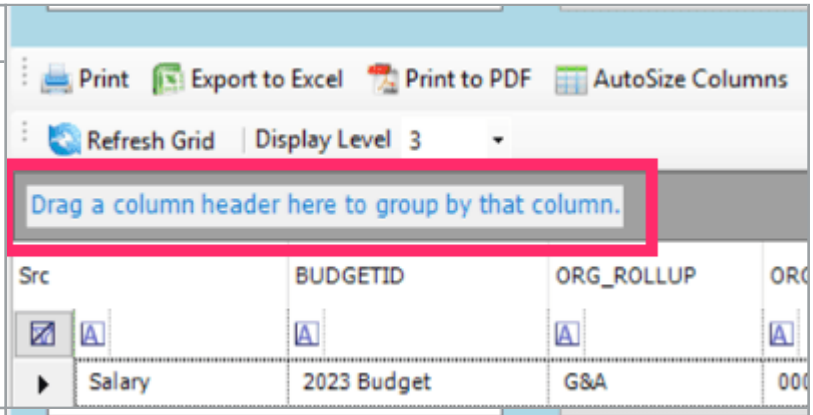
8



9

Now let's sort this screen.

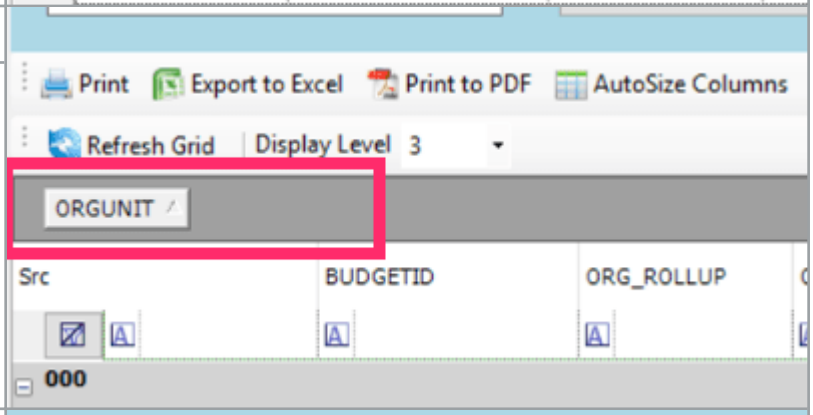
Drag a column header to group by that column.




10

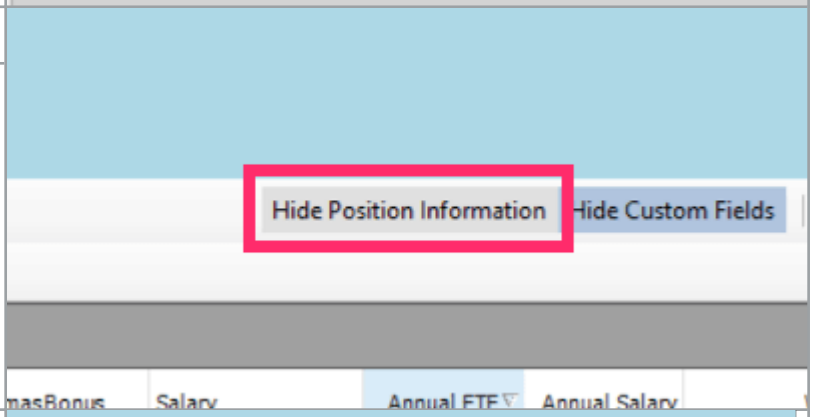
Let's drag the OrgUnit header to the gray area.

Now you see the screen is organized by OrgUnit.



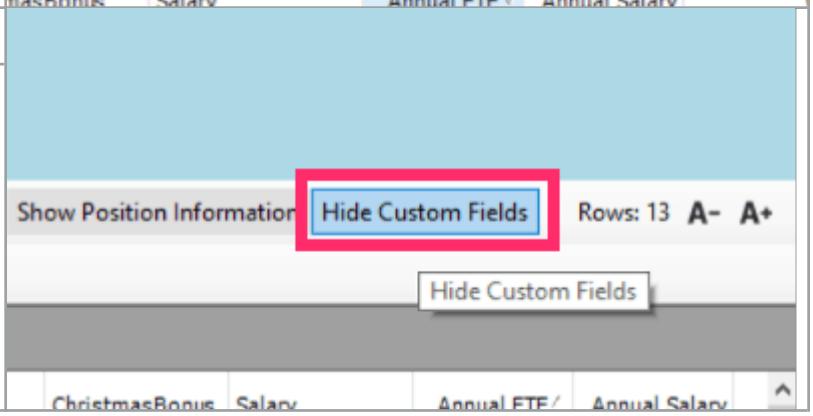

11

Click on Hide Position Information.



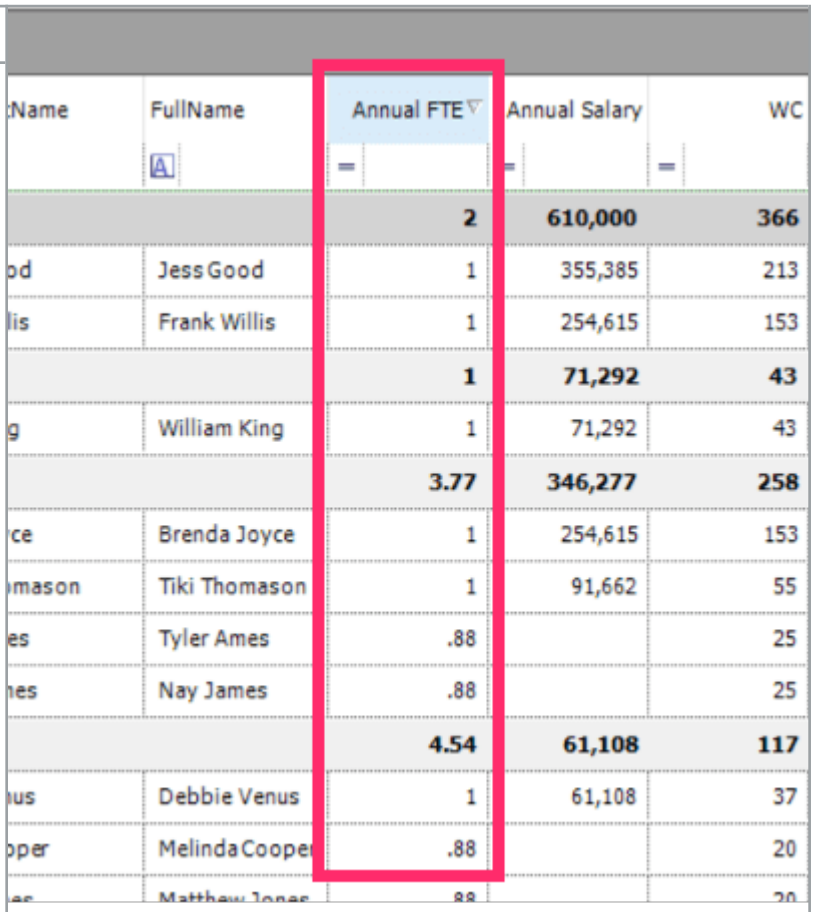

12

Click on Hide Custom Fields.



13

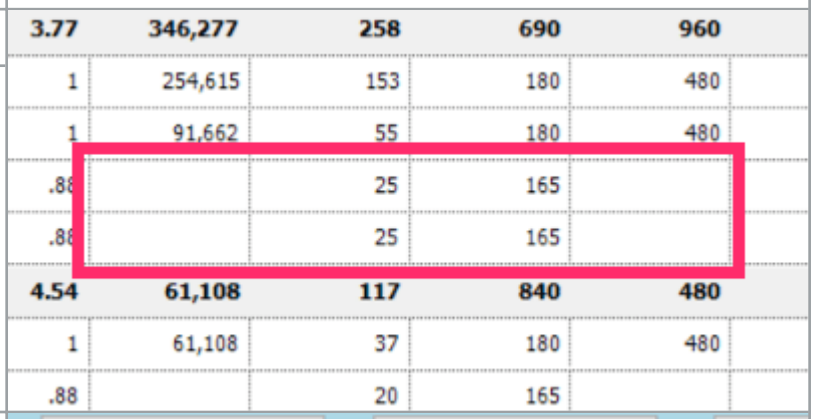
You can review the Annual FTE column to verify employee allocations are accurate.



| Name | FullName | Annual FTE | Annual Salary | WC |
|---|---|---|---|---|
| | | **2** | **610,000** | **366** |
| od | Jess Good | 1 | 355,385 | 213 |
| lis | Frank Willis | 1 | 254,615 | 153 |
| | | **1** | **71,292** | **43** |
| g | William King | 1 | 71,292 | 43 |
| | | **3.77** | **346,277** | **258** |
| ce | Brenda Joyce | 1 | 254,615 | 153 |
| mason | Tiki Thomason | 1 | 91,662 | 55 |
| es | Tyler Ames | .88 | | 25 |
| nes | Nay James | .88 | | 25 |
| | | **4.54** | **61,108** | **117** |
| us | Debbie Venus | 1 | 61,108 | 37 |
| oper | Melinda Cooper | .88 | | 20 |
| es | Matthew Jones | 88 | | 20 |

14

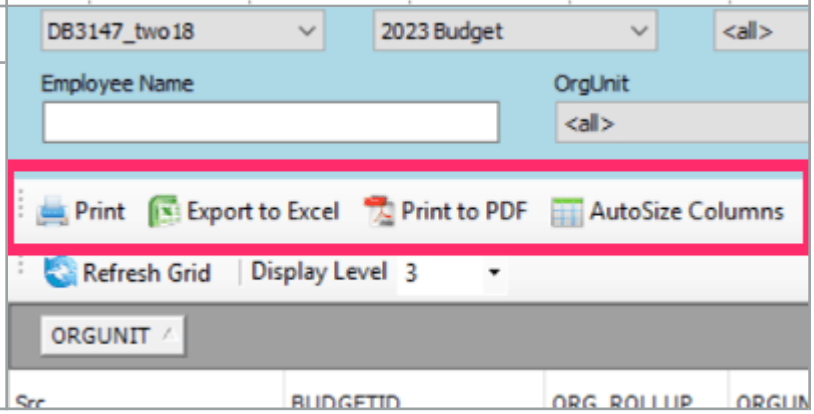
If you see any blank/white cells, you can make corrections where necessary.



| | | | | |
|---|---|---|---|---|
| **3.77** | **346,277** | **258** | **690** | **960** |
| 1 | 254,615 | 153 | 180 | 480 |
| 1 | 91,662 | 55 | 180 | 480 |
| .88 | | 25 | 165 | |
| .88 | | 25 | 165 | |
| **4.54** | **61,108** | **117** | **840** | **480** |
| 1 | 61,108 | 37 | 180 | 480 |
| .88 | | 20 | 165 | |

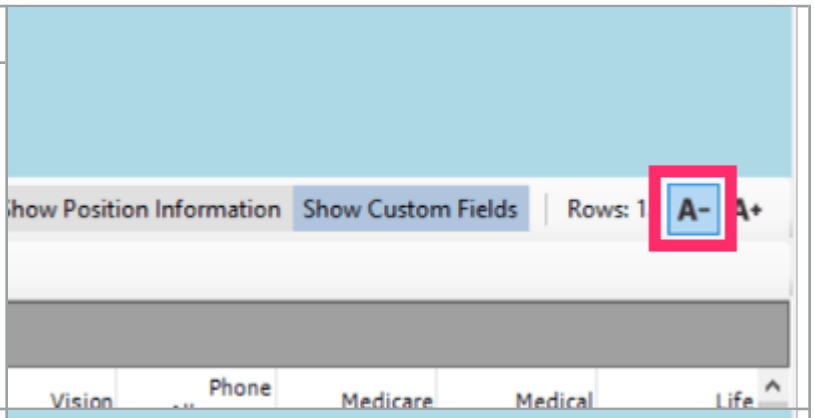
15

You can also print, export to excel, print to PDF and AutoSize Columns.



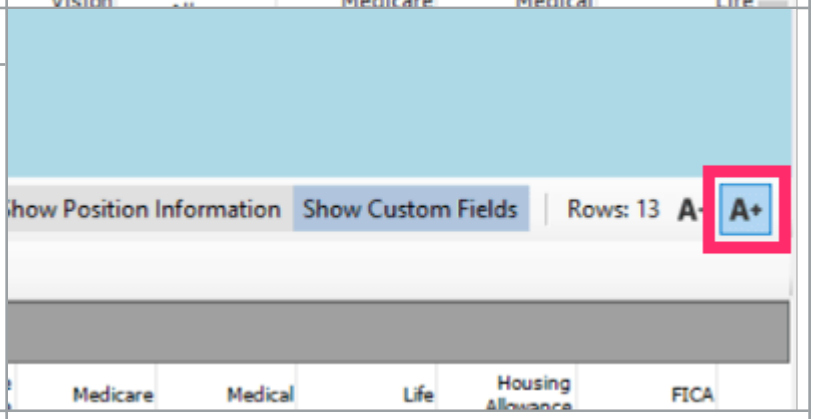
Click on A- to minimize or decrease the magnification of the screen.

16




Click on A+ to maximize or increase the magnification of the screen.

17




That's It. You're Done.

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