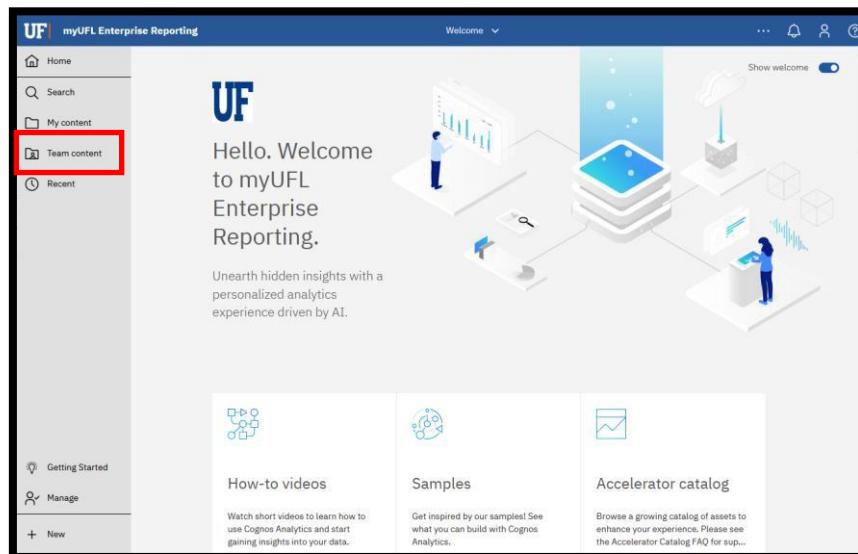


## THE COMPREHENSIVE PROJECTED PAYROLL

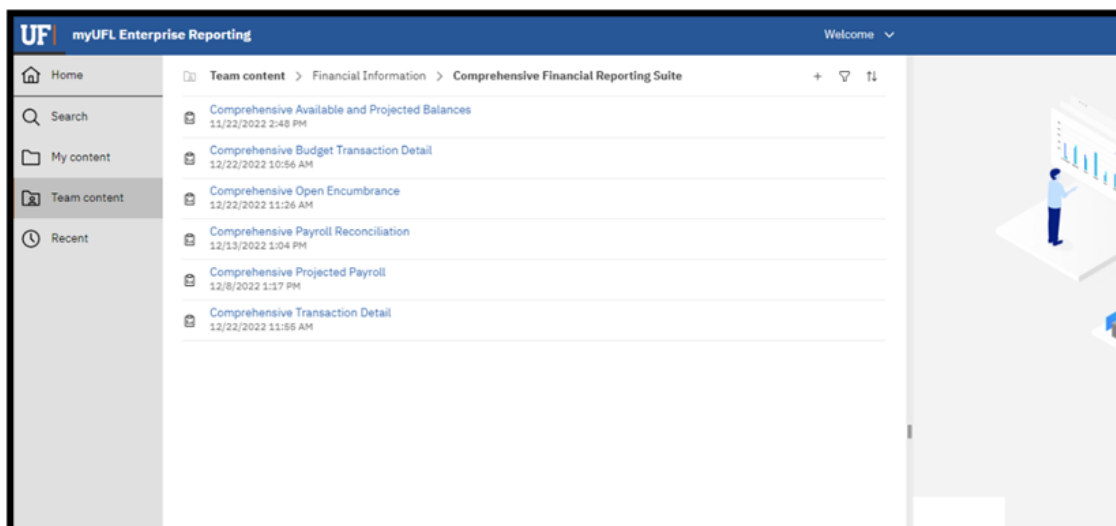
Report provides projected earnings and estimated fringe figures either for all department cost centers that funded an individual or all current distributed individuals for a particular cost center based on prompts selected. Distribution commitment dates, percentage and individual's FTE are included.

### NAVIGATION

1. Login into myUFL and navigate to: **Nav Bar > Main Menu > Enterprise Analytics > Access Enterprise Analytics**
2. To open the report, click on the **Team Content** folder.
  - The Team Content folder is used for reports shared by you and other members of your team. The My Content folder is used for your personal reports.

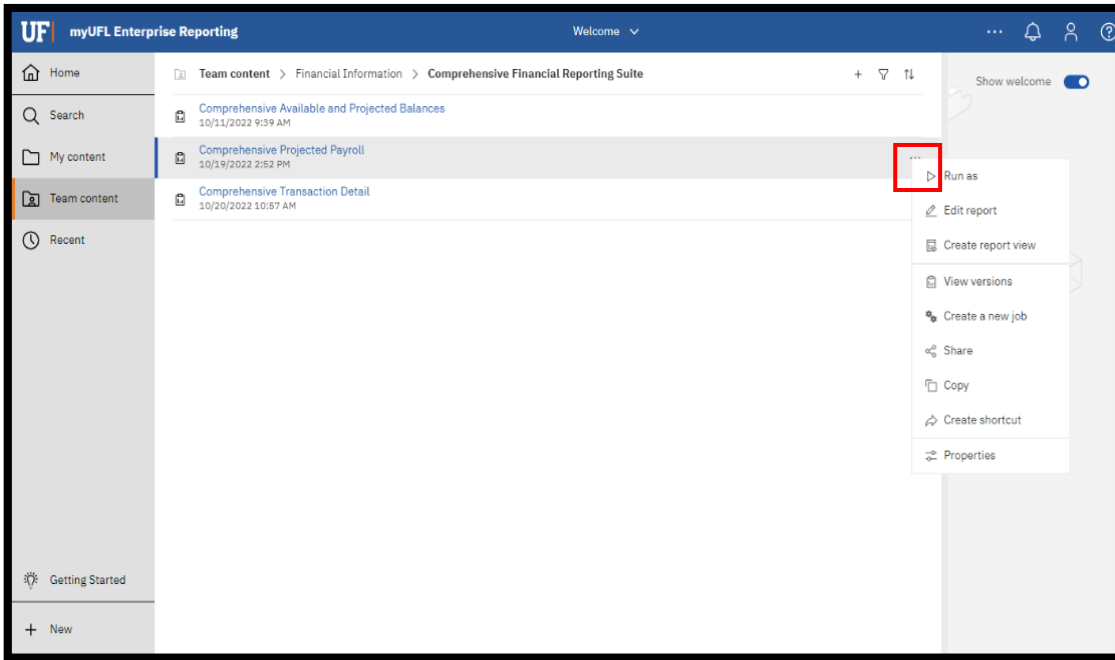


3. Navigation to the report: **Team content > Financial Information > Comprehensive Financial Reporting Suite**

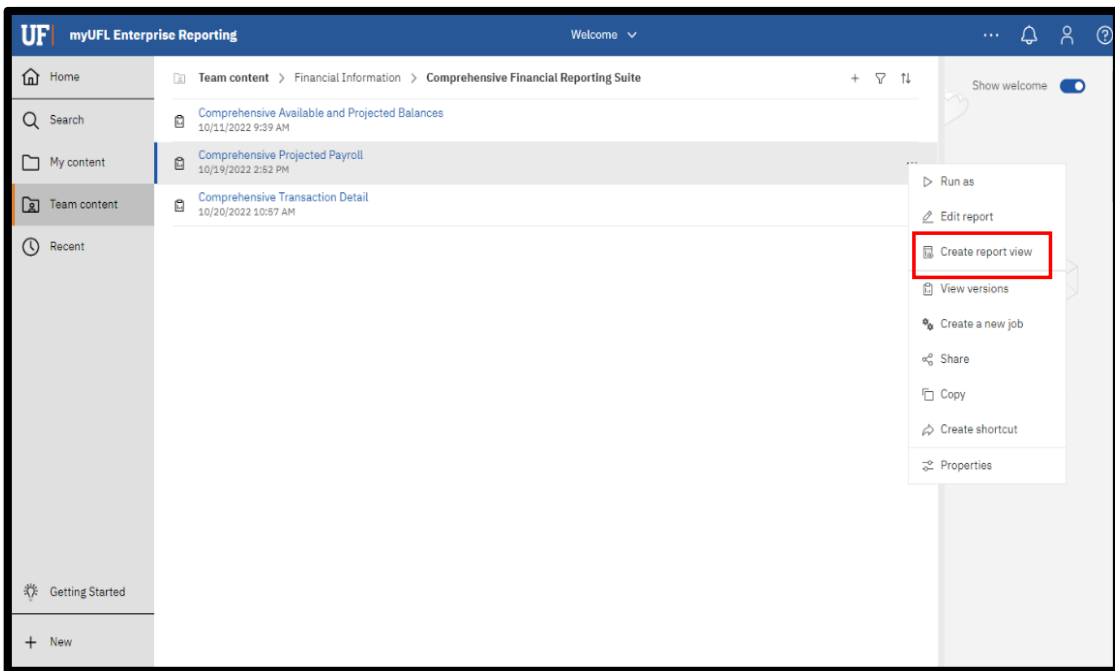


## CREATING REPORTING VIEW AND SETTING PROMPTS

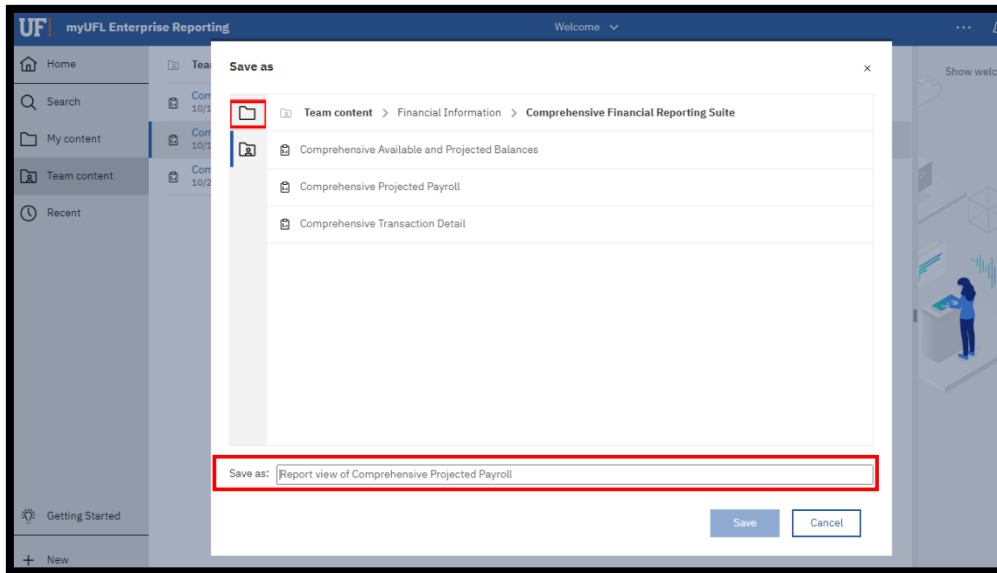
1. Click the **more** options (ellipses).



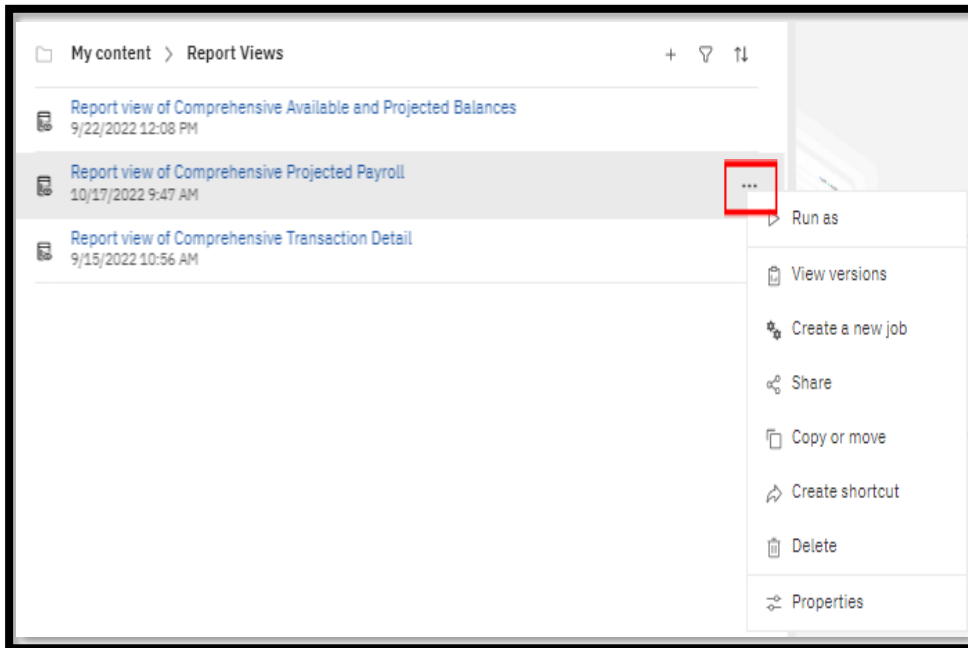
2. Select **Create report view**.



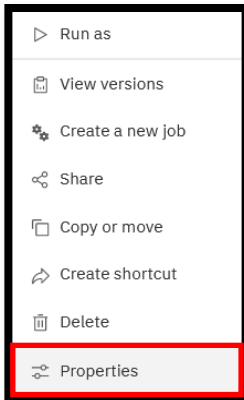
3. Name the report as desired and save to your **My Content** folder:



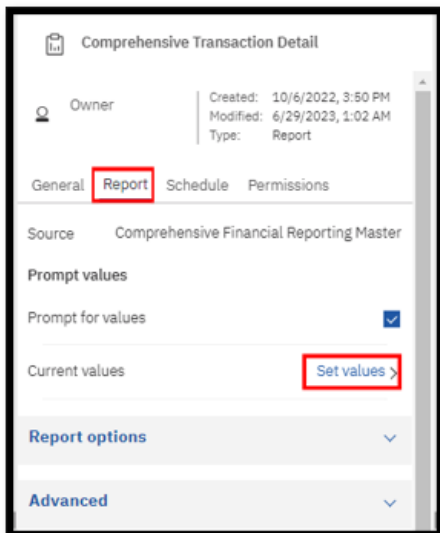
4. Navigate to the saved report view and click the **more** icon.



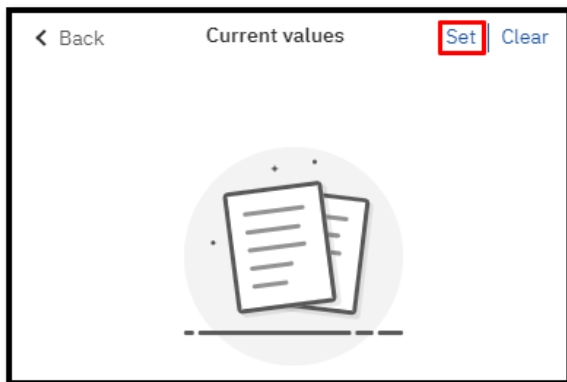
5. Click **Properties**.



6. Click **Report**, then **Set Values**:



7. Click **Set**



8. Set the **Required** and **Optional** prompts and then click **Run Report**.

This report will be downloaded in Excel format

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Select Employees Using Job Data Home College / DeptID(s)?

Select Employees by Distributed Di ▼

Include or Exclude Chartfield Descriptions?

Exclude Chartfield Descrs ▼

Select Salary Admin Plan(s)

- CPFI~Clin Postdoc Assoc/Inte
- CTSY~Courtesy Faculty Appoi
- FA09~Salaried Faculty - 9 Mo
- FA10~Salaried Faculty - 10 M
- FA12~Salaried Faculty - 12 M

Select all Deselect all

**Comprehensive Projected Payroll**

Description: Report provides projected earnings and estimated fringe figures either for all department cost centers that funded an individual or all current distributed individuals for a particular cost center based on prompts selected. Distribution commitment dates, percentage and individual's FTE are included.

Inquiries: Please contact reporting-services@ufl.edu with any questions or comments.

Last Modified: 6/28/23

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**Chartfield Values**

Select College

College Code Mask and Desc ▼

OR

Select DeptID(s)

Keywords: Input keywords here 🔍

Select all

No Results

Choices:

Select Fund(s)

Keywords: Input keywords here 🔍

Select all

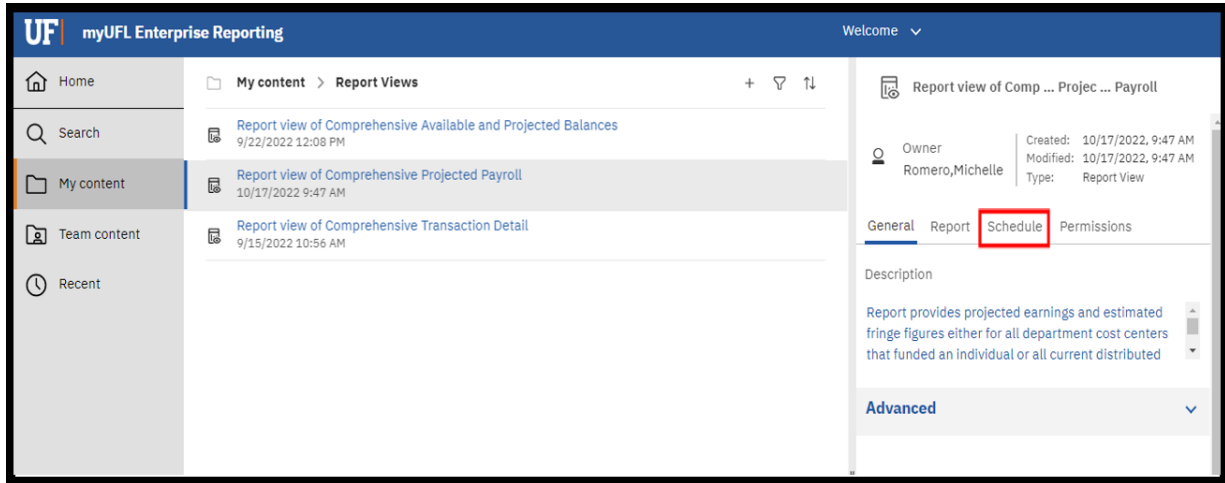
No Results

Choices:

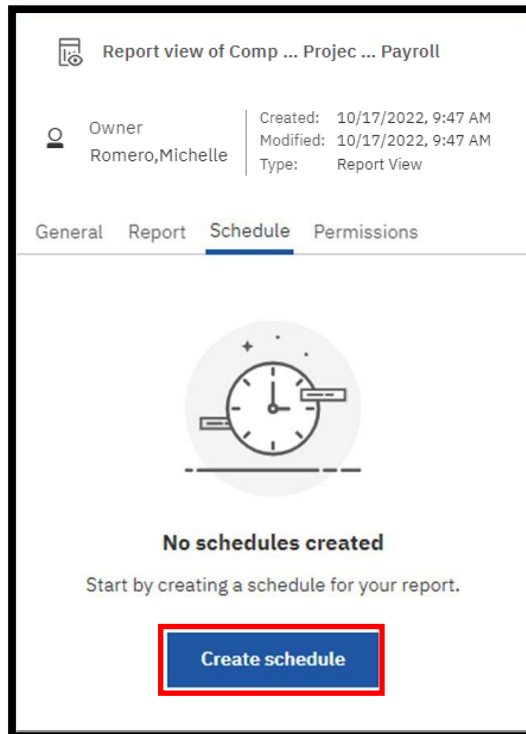
OR

## SCHEDULING THE REPORT FOR EMAIL DELIVERY

1. Click **Schedule**.



2. Click the **Create Schedule** button.

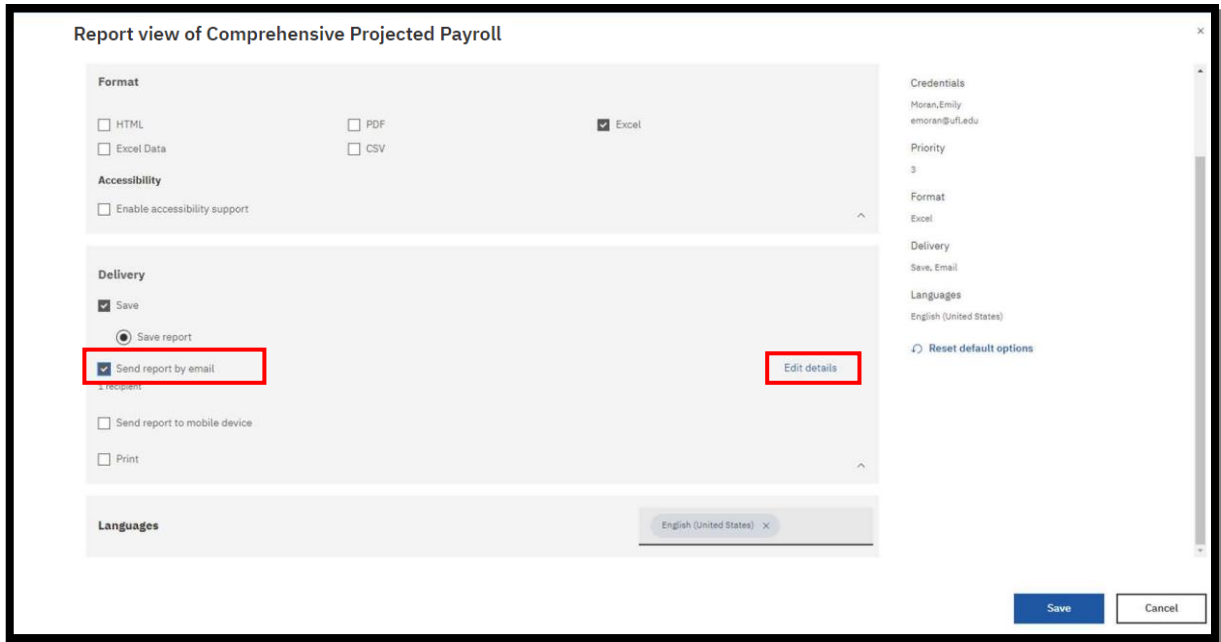


3. Select when and how frequently you would like to receive the report.

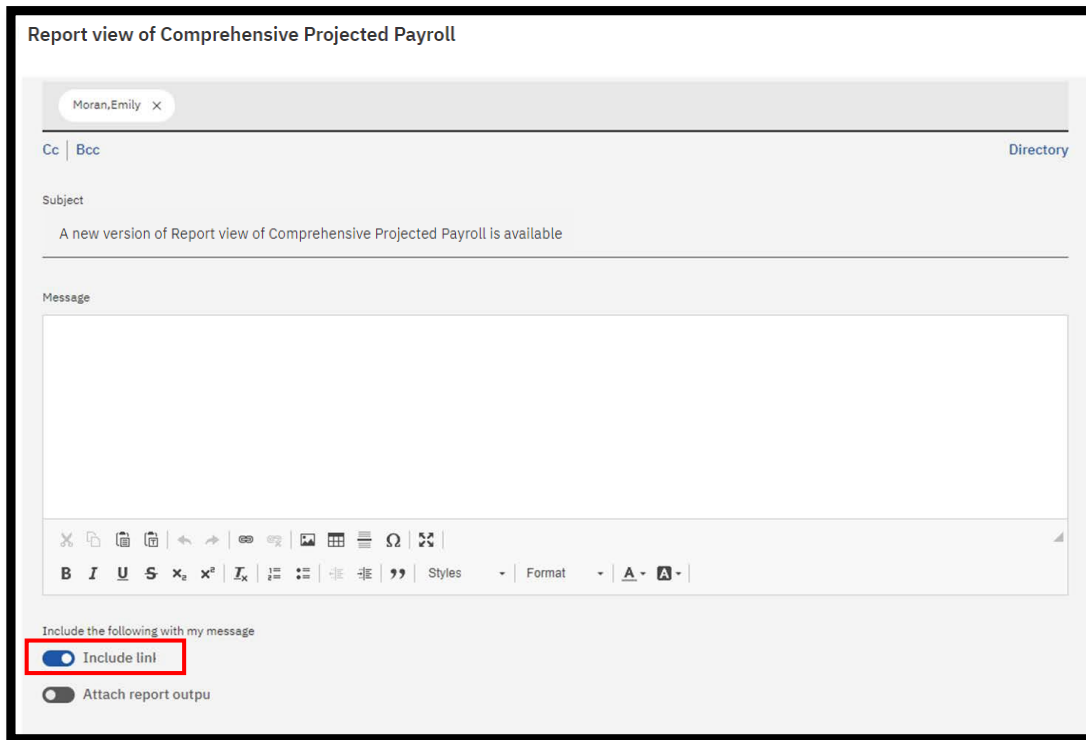
The screenshot displays the 'Report view of Comprehensive Projected Payroll' configuration interface. It features three tabs: 'Schedule', 'Options', and 'Prompts', with 'Schedule' being the active tab. The 'Frequency' section is highlighted with a red border and contains the following settings:

- Type:** Weekly (dropdown menu)
- Repeat every:** 1 week (spinner control)
- Repeat on:** M, T, W, T, F, S, S (checkboxes for each day, with 'T' selected)
- Daily time interval:**  (unchecked)
- Period:**
  - Start:** 2022-07-05 (calendar icon) and 4:00 PM (clock icon)
  - No end date

4. Click on the Options Tab and select **Send the report by email**. Set email options by clicking Edit Details.

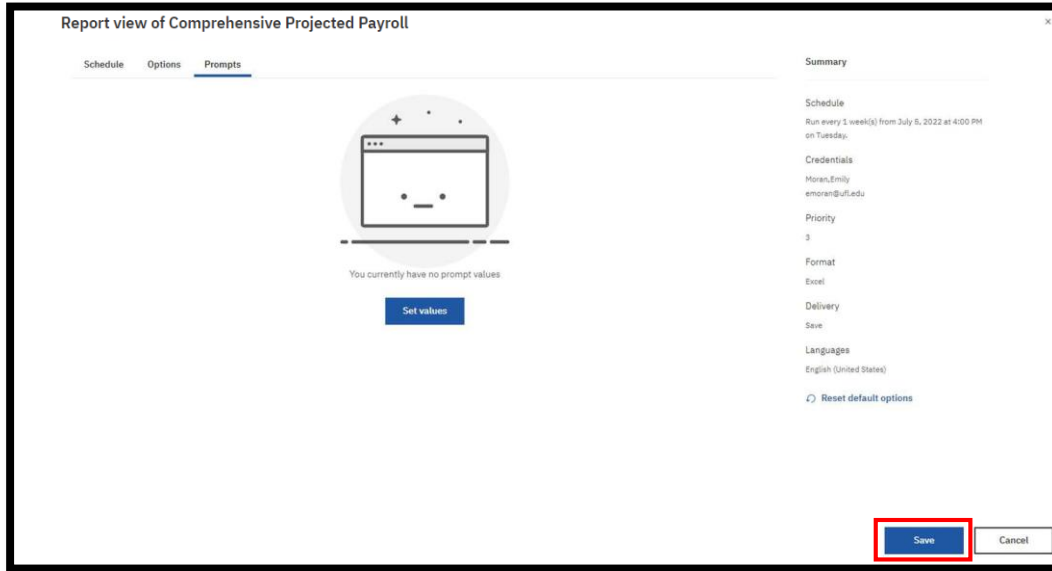


5. **A best practice is to send the report as a link** rather than as an attachment to ensure that the recipient has permissions to view the data. This will also ensure that large files are not prevented from being sent through email. The recipient will have to log into Enterprise Analytics. Gatorlink will authenticate their permissions.

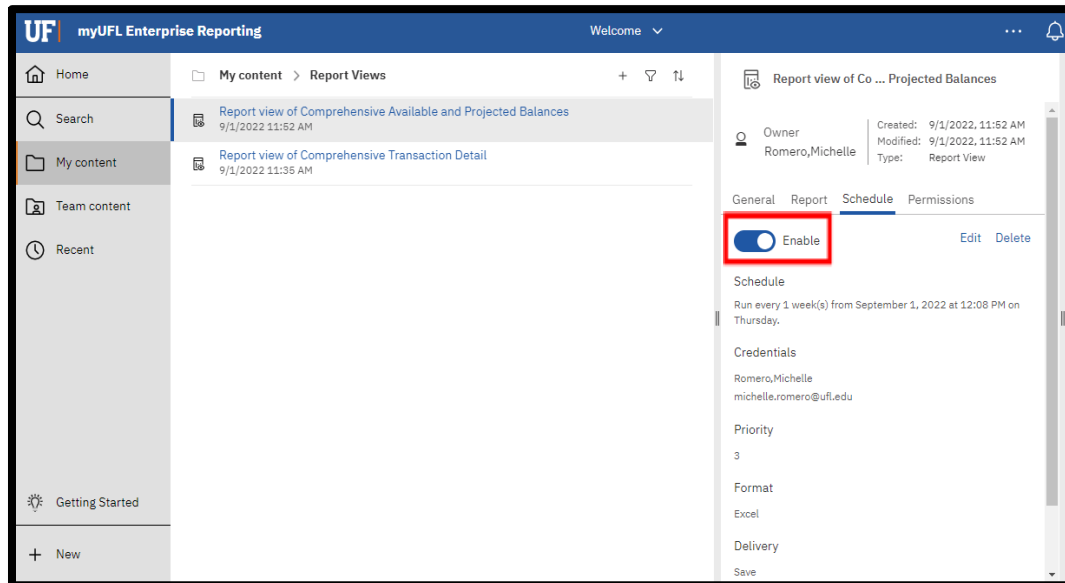




6. Click **Save**



7. The schedule confirmation message displays. Make sure that **Schedule** is set to enable



## Report Prompts with Explanation

Reminder: Report will filter down to the specific combination of prompts used. No date prompts included as this report is for future projections

- Select Employees Using Job Data/ Distributed Dept
  - Select Employees By Job Data Home Dept – Prompt will pull all employees under a dept id/college job data record regardless of distribution
    - Best to run with only dept id or college prompts
    - Example Scenario: Trying to find where all your employees are being paid from
  - Select Employees By Distributed Dept – Prompt will pull all employees distributed to cost center prompted regardless of job data dept
    - Example Scenario: Trying to find all employees paid from a specific funding source
  - Include or Exclude Chartfield Descriptions
    - This prompt will allow you to either include or exclude description of Chartfield values
      - Excludes: 731100
      - Includes: 731100 - Lab Supplies
  - Select Salary Admin Plan(s)
- Chartfield Values: Prompts only if used in Combination Code
  - College
  - Dept ID(s)
  - Fund(s)
  - Source of Fund(s)
  - Budget Reference(s)
  - Flex Code(s)
  - EmplID Chartfield(s)
    - Cannot be used to pull payroll for a specific employee
- Project / Award Related Values:
  - Award ID(s)
  - Award PI UFID(s)
  - Project ID(s)
  - Project Manager UFID(s)

## Report Export Fields with Explanation

All employees will show up with a minimum of two lines due to the account code for earnings/fringe being different

- Employee UFID
- Employee Name
- Employee Rec #
- Combination Code
- FTE
- Fiscal Year
- Distribution Commitment Begin Date
- Distribution Commitment End Date
- Type of Distribution
  - Regular or Default
- Distrib %
- Category
  - Type of Expense – OPS/Salary
- Employee Type

- Salary Admin Plan Type
- Salary Admin Plan
  - Code
- Class Code
- Projected Earnings
- Projected Fringe
  - Estimated
- Projected Total
- Account Code
- Dept ID Fund Code
- Program Code
- Budget Reference
- Source of Funds Code
- Project Code
- Flex Code
- EmplID
- CRIS Code
- Project Department Code
- Project Division Code
- Award ID
- Award Full Title
- Sponsor Name
- Award PI UFID
- Award PI Name
- Project Manager UFID
- Project Manager Name

#### ADDITIONAL HELP

Technical issues, contact the University of Florida Reporting Services  
[reporting-services@ufl.edu](mailto:reporting-services@ufl.edu)