Closeout 13- Payroll By Person

Summary
Below are some of the main elements of the Payroll By Person page:

Purpose
The purpose of the Payroll By Person page is to allow users to navigate through the payroll transactions on their fund. Expenses on this page are pulled in from the payroll system, not the general ledger. Below is a sample view of the Payroll By Person page:
Screen Group
The Payroll By Person page can be accessed three ways:

1. From the Menu Bar; user selects Payroll by Person under the Financial Summary tab.

2. From the Overview page, with the link called Payroll by Person under the Financial Summary.
3. When user clicks on the label for 00, 01, 02, and 06 on the Summary By Sub page.

Screen View
The Payroll By Person page is visible to all. Home users can view Home and Linked accts, Linked users can only view the individual Linked account. The screen consists of dropdown options (green box) and once dropdowns are selected, the Payroll By Person grid appears (red box):
Dropdowns:
If the user accesses the Payroll By Person page through the navigation bar or the COP overview, the default on the drop down filters will be Earn Date From (first Month / Year available), Earn Date To (last Month / Year), FAU (All), Employee Name (All), Sub (All). If the user accesses the Payroll By Person page through the Summary by Sub page, the dropdown filter for Sub will be set to match the Sub label clicked.

FAU Dropdown: For Home and EFM, user may select option for “All”. Home Depts can see Linked FAUs. For Linked, user can only view their FAUs.

Earn Date From and Earn Date To: User selects Month and Year (for beginning date) through drop down box. The first option will be the first month/year that has data. The last month/year available in the drop-down will be the last CLOSED ledger month

Employee Name: This dropdown will list all employees that have salary charges on the FAU(s).

Sub: This dropdown box will list all Sub codes, even if certain Sub codes do not exist on fund/FAU.

Note: When the user filters on one field, only the available results will appear in the remaining dropdowns. For example, if Employee A only has salary charged to Sub code 00, and the user filters on Employee A, only the sub code 00 will be available in the drop-down menu. Also, if the user first filters on sub code 02, Employee A will not appear in the drop-down for Employee Name.

Payroll By Person Grid
The Payroll By Person grid will display results based on the dropdown filter selections. If no results exist for the drop downs selected, the grid will display “None Found”. All fields in the grid are pulled directly from the payroll ledger. The fields displayed in the grid can be seen below:
By default, the grid will be sorted by Employee Name, then by Earn date (in descending order). The Grid can also be custom sorted by clicking on the column headers:

**Report Generation**

The grid can be exported to Excel by clicking the Excel icon on the top right of the grid.

**Page Access**

The Sum by Sub page is viewable to: EFM Director, Dept Sr. Fund Manager, Dept Admin, Dept Fund Manager, EFM Fund Manager and EFM Supervisor.