Q10. How do I pull the payroll detail report in Orbit that the financial reporting team uses?

To pull the payroll detail report in Orbit, use the **GL Payroll Employee Expenses (PFi001)** report:

1. Open the link for <u>Orbit</u> Reporting Portal. Note: Orbit can be found on the UTSW intranet through the tabs labeled Administration or Tools.

2.

Medical Center				Search this site		Search	
About Us Administration Department	s & Centers Education	Hospital & Clinics	Human Resource	es Research	Services	∞ ▼	
Home / Administration				1			
Administration							
Accounting & Fiscal Services Accounting Updates 	Faculty Diversity Financial Affairs	and Development	OF	• Worker Protect BIT- UTSW Repo	ion Plan rting Portal		

	in page win open. Cick Standard Reports.
UT Southwestern	Home
Wedical Center	Welcome to ORBIT
Ø rbit	Online Reporting Business Intelligence Tools (ORBIT) is a central portal that contains standard reports developed using the Enterprise Data Warehouse (EDW). It also has links to various reporting portals for Administration, Academic, and Health System. Releases of new reports and report modifications are introduced to the portal on a regular basis. To request access to ORBIT dashboards and reports, please contact the Service Desk and mention ORBIT. Access requests will be reviewed by respective data stewards, and the requestor will be notified of the approval or disapproval by the Service Desk. By using this portal and its contents, you agree to the <u>Confidentiality Agreement</u> .
	Not sure which report bundles you have access to? Click here to find out.
EDW Reports	
Standard Reports	Custom Reports Report Finder Package Analyze In Excel (AIC) Templates

3. Scroll down to the Subject Area for "Leave, Payroll, and Timekeeping", then locate PFi001 (GL Payroll Employee Expenses). Using the right click button on your mouse, open the Full Version in a new window. (Note: opening in a new window allows users to easily return to the Orbit page).

4	Subject Area : Leave, Payroll, and	Timekeeping (7)				
	GL Payroll Employee Expenses	PFi001	INC	Full	ll Version	Web Version	Web Version (Detail)
			LIVE			(Summary)	

4. The report should open to the default homepage labeled "Payroll Expenses by Funding Department" as demonstrated below.

	Power BI EDS 092 AER	PRD		PFi001 Payroll Employee Expenses Data updated 6/15/22 🗸	,P Search D	@ ± ? @ 📢
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Search for the Project ID in the Project box (see 1). Select the fiscal year and months that you would like to view. To select more than one year/month, hold down the Control key on your keyboard and select the years/months (see 2) for which you are searching.



6. In the field with the magnifying glass icon, enter the Project ID number.



Note: the drop down menu will switch its appearance once you enter the Project ID number – no action needed to correct this. See example below:

Funding EDW Level 6-Division					
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₽ 10015	704				
10015	704-PP180091 STOP	-HCC Expa			

Once you have entered your search parameters, the report auto-generates accordingly. You
may choose to export the list into Excel. To do this, locate the ellipses in the bottom right
corner (see 3 in screenshot on previous page), just above the column labeled Project
Description.



A popup will appear. Select "Data with current layout" and click the Export button.

Which data do you want to export?				
Export your data in the format rows you export might be limi	that suits your needs. If you have ted depending on the file type you	a lot of data, the number of u select. <u>Learn more</u>		
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Data with current layout	Summarized data	Underlying data		
Export this data in the same layout you see now, but without any icons, colors, or other formatting you added.	Export the summarized data used to create your visual (for example, sums, averages, and medians).	Export the raw data used to calculate the data in your visual.		
File format:				
.xlsx (Excel 150,000-row max)~			
		Export		

8. Once your data is exported to Excel, you are able to filter the payroll detail data as needed.

END OF INSTRUCTIONS