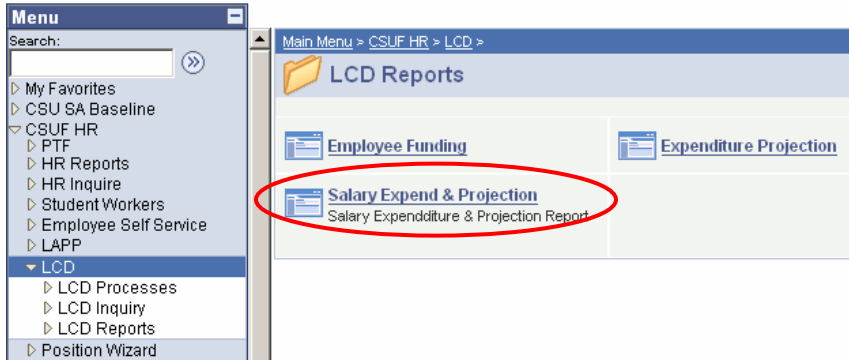













To view online tutorial, visit: <http://www.fullerton.edu/cms/Training/docs/index.html>

The **LCD Salary Expenditure Projection Report** allows departments to view baseline salaries for positions within their department. Access to this report and specific CMS departments is defined by the user's security access.

Frequency: Ad hoc

| | |
|---|---|
| <p>Step 1: Navigate to the correct page:</p> <p>Menu > CSUF HR > LCD > LCD Reports > Salary Expend & Projection</p> <p>Note: You may navigate to the appropriate link using the menu list on the left or the link in the body of the page.</p> |  |
| <p>The Salary Expenditure Projection Report Page appears.</p> <p>Step 2:</p> <p>Run Control ID identifies specific run control settings for a specific report or process. A Run Control ID must exist in order to run a CMS report or process.</p> <p>Click Search to see what run controls you have available to you.</p> <p>If this is your first time running the report, click Add a New Value.</p> | <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p>Find an Existing Value Add a New Value</p> <p>Search by: Run Control ID begins with <input type="text"/></p> <p><input type="checkbox"/> Case Sensitive</p> <p>Search Advanced Search</p> <p>Find an Existing Value Add a New Value</p> |
| <p>Step 2A:</p> <p>Add a Run Control ID</p> <p>You can name your Run Control ID any name. You cannot use spaces; use underscore (_) instead.</p> <p>Click Add.</p> | <p>Salary Expenditure-Projection</p> <p>Find an Existing Value Add a New Value</p> <p>Run Control ID: <input type="text" value="LCD_Salary_Expenditure"/></p> <p>Add</p> <p>Find an Existing Value Add a New Value</p> |



| | |
|--|---|
| <p>Step 3:</p> <p>The Salary Expenditure Projection page appears.</p> <p>The Business Unit automatically defaults to "FLCMP", you do not need to change this value.</p> <p>Enter information into the following required fields:</p> <ul style="list-style-type: none"> - Fiscal Year - Fund (leave blank to request all funds) <p>You may also use the  icon to look up the appropriate values.</p> | <p>Run Control ID: LCD_Reports Report Manager !</p> <p>Report Parameter(s)</p> <div style="border: 2px solid red; padding: 5px;"> <p>Business Unit: FLCMP </p> <p>Fiscal Year: 2007  (YYYY)</p> <p>Fund: THEFD  CSU Operating Fund (Leave Fund blank to request all funds.)</p> </div> |
| <p>Step 3a:</p> <p>Next, enter the reporting level or department the Salary Expenditure Projection report will be run for.</p> <p>To run the report without projections or generate a spreadsheet click the box <input type="checkbox"/>.</p> | <div style="display: flex; justify-content: space-between;"> <div data-bbox="592 867 1084 1031"> <p>Choose One Rollup Level or Department</p> <p>Division <input type="text"/></p> <p>College/Unit <input type="text"/></p> <p>Department 10057 </p> </div> <div data-bbox="1122 867 1416 993"> <p>Additional Parameters</p> <p><input type="checkbox"/> Report with no Projections</p> <p><input type="checkbox"/> Generate Spreadsheet</p> </div> </div> <p>Note: Not all fields displayed are required</p> |
| <p>Step 4:</p> <p>Once the required fields are complete click <input type="button" value="Run"/>.</p> | <p>Run Control ID: LCD_Reports Report Manager Process Monitor <input type="button" value="Run"/></p> <p>Report Parameter(s)</p> <div style="border: 2px solid red; padding: 5px;"> <p>Business Unit: FLCMP </p> <p>Fiscal Year: 2007  (YYYY)</p> <p>Fund: THEFD  CSU Operating Fund (Leave Fund blank to request all funds.)</p> </div> <div style="display: flex; justify-content: space-between;"> <div data-bbox="592 1497 1096 1648"> <p>Choose One Rollup Level or Department</p> <p>Division <input type="text"/></p> <p>College/Unit <input type="text"/></p> <p>Department 10057 </p> </div> <div data-bbox="1133 1497 1433 1623"> <p>Additional Parameters</p> <p><input type="checkbox"/> Report with no Projections</p> <p><input type="checkbox"/> Generate Spreadsheet</p> </div> </div> |



| <p>Step 5:</p> <p>The Process Scheduler page appears.</p> <p>Complete the following fields: Server Name=PSUNX Type = Web Format = PDF</p> <p>Leave all other fields as is.</p> | <p>Process Scheduler Request</p> <p>User ID: LLEDYARD Run Control ID: LCD_Salary_Expenditure</p> <p>Server Name: PSUNX Run Date: 07/31/2007</p> <p>Recurrence: Run Time: 11:21:02AM Reset to Current Date/Time</p> <p>Time Zone: <input type="text"/></p> <table border="1"> <thead> <tr> <th>Select</th> <th>Description</th> <th>Process Name</th> <th>Process Type</th> <th>*Type</th> <th>*Format</th> <th>Distribution</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>Salary Expend& Projection</td> <td>FULLCD04</td> <td>SQR Report</td> <td>Web</td> <td>PDF</td> <td>Distribution</td> </tr> </tbody> </table> <p>OK Cancel</p> | Select | Description | Process Name | Process Type | *Type | *Format | Distribution | <input checked="" type="checkbox"/> | Salary Expend& Projection | FULLCD04 | SQR Report | Web | PDF | Distribution |
|--|--|---------------|--------------|--------------|------------------|------------------------------|-----------|--------------|-------------------------------------|---------------------------|----------|------------|------------|------------|------------------------------|
| Select | Description | Process Name | Process Type | *Type | *Format | Distribution | | | | | | | | | |
| <input checked="" type="checkbox"/> | Salary Expend& Projection | FULLCD04 | SQR Report | Web | PDF | Distribution | | | | | | | | | |
| <p>Step 6:</p> <p>For troubleshooting purposes, you must specify the "Distribution" information.</p> <p>Click on the Distribution link.</p> <p><i>Note: This step must be completed only once per report.</i></p> | <p>Process Scheduler Request</p> <p>User ID: LLEDYARD Run Control ID: LCD_Salary_Expenditure</p> <p>Server Name: PSUNX Run Date: 07/31/2007</p> <p>Recurrence: Run Time: 11:21:02AM Reset to Current Date/Time</p> <p>Time Zone: <input type="text"/></p> <table border="1"> <thead> <tr> <th>Select</th> <th>Description</th> <th>Process Name</th> <th>Process Type</th> <th>*Type</th> <th>*Format</th> <th>Distribution</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>Salary Expend& Projection</td> <td>FULLCD04</td> <td>SQR Report</td> <td>Web</td> <td>PDF</td> <td>Distribution</td> </tr> </tbody> </table> <p>OK Cancel</p> | Select | Description | Process Name | Process Type | *Type | *Format | Distribution | <input checked="" type="checkbox"/> | Salary Expend& Projection | FULLCD04 | SQR Report | Web | PDF | Distribution |
| Select | Description | Process Name | Process Type | *Type | *Format | Distribution | | | | | | | | | |
| <input checked="" type="checkbox"/> | Salary Expend& Projection | FULLCD04 | SQR Report | Web | PDF | Distribution | | | | | | | | | |
| <p>Step 7:</p> <p>The Distribution Detail page appears.</p> <p>Click on the + button to add a new row.</p> | <p>Distribution Detail</p> <p>Process Name: FULLCD01</p> <p>Process Type: SQR Report</p> <p>Folder Name: <input type="text"/></p> <table border="1"> <thead> <tr> <th colspan="2">Distribute To</th> </tr> <tr> <th>ID Type</th> <th>*Distribution ID</th> </tr> </thead> <tbody> <tr> <td>User</td> <td>892248626</td> </tr> </tbody> </table> <p>+ -</p> | Distribute To | | ID Type | *Distribution ID | User | 892248626 | | | | | | | | |
| Distribute To | | | | | | | | | | | | | | | |
| ID Type | *Distribution ID | | | | | | | | | | | | | | |
| User | 892248626 | | | | | | | | | | | | | | |
| <p>Step 8:</p> <p>In the new row, complete the following fields:</p> <ul style="list-style-type: none"> - ID Type: Role - Distribution ID: FS HR <p>Then click the look up icon </p> | <p>Distribution Detail</p> <p>Process Name: FULLCD01</p> <p>Process Type: SQR Report</p> <p>Folder Name: <input type="text"/></p> <table border="1"> <thead> <tr> <th colspan="2">Distribute To</th> </tr> <tr> <th>ID Type</th> <th>*Distribution ID</th> </tr> </thead> <tbody> <tr> <td>User</td> <td>892248626</td> </tr> <tr> <td>Role</td> <td>FS HR</td> </tr> </tbody> </table> <p>+ - + -</p> | Distribute To | | ID Type | *Distribution ID | User | 892248626 | Role | FS HR | | | | | | |
| Distribute To | | | | | | | | | | | | | | | |
| ID Type | *Distribution ID | | | | | | | | | | | | | | |
| User | 892248626 | | | | | | | | | | | | | | |
| Role | FS HR | | | | | | | | | | | | | | |



| <p>Step 9:</p> <p>The Distribution ID look up page appears. Click on the link FS HRReport Distribution List.</p> | <h3>Look Up Distribution ID</h3> <p>Search by: <input type="text" value="Distribution ID"/> begins with <input type="text" value="FS HR"/></p> <p><input type="button" value="Look Up"/> <input type="button" value="Cancel"/> Advanced Lookup</p> <h4>Search Results</h4> <p>View All First 1 of 1 Last</p> <table border="1"> <thead> <tr> <th>Distribution ID</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>FS HRReport Distribution List</td> <td>HR Report Distribution List</td> </tr> </tbody> </table> | Distribution ID | Description | FS HRReport Distribution List | HR Report Distribution List | | |
|--|--|-----------------|------------------|---|-----------------------------|------|-------------------------------|
| Distribution ID | Description | | | | | | |
| FS HRReport Distribution List | HR Report Distribution List | | | | | | |
| <p>Step 10:</p> <p>Verify the Distribution Detail page for accuracy.</p> <p>Once complete, click <input type="button" value="OK"/>.</p> | <h3>Distribution Detail</h3> <p>Process Name: FULLCD01 Process Type: SQR Report Folder Name: <input type="text"/></p> <h4>Distribute To</h4> <table border="1"> <thead> <tr> <th>ID Type</th> <th>*Distribution ID</th> </tr> </thead> <tbody> <tr> <td>User</td> <td>892248626</td> </tr> <tr> <td>Role</td> <td>FS HRReport Distribution List</td> </tr> </tbody> </table> <h4>Email Only</h4> <p>Email Subject: <input type="text"/> <input type="checkbox"/> Email With Log <input type="checkbox"/> Email Web Report <input type="checkbox"/></p> <p>Message Text: <input type="text"/></p> <p>Email Address List: <input type="text"/></p> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/></p> | ID Type | *Distribution ID | User | 892248626 | Role | FS HRReport Distribution List |
| ID Type | *Distribution ID | | | | | | |
| User | 892248626 | | | | | | |
| Role | FS HRReport Distribution List | | | | | | |
| <p>Step 11:</p> <p>The Salary Expenditure History process page appears with a Process Instance number.</p> <p>This is a confirmation number for your reference.</p> | <p>Run Control ID: Report Manager Process Monitor <input type="button" value="Run"/></p> <p>Process Instance: 51613</p> <h4>Report Parameter(s)</h4> <p>*Business Unit: <input type="text" value="FLCMP"/></p> | | | | | | |



| <p>Step 12:</p> <p>After you have initiated the process you can check the status and view the attendance reports by clicking Report Manager.</p> | <p>Run Control ID: Report Manager Process Monitor Run Process Instance:51613</p> <p>Report Parameter(s)</p> <p>'Business Unit: FLCMP</p> | | | | | | | | | | | | |
|---|---|-------------|----------------------|-------------|----------------------|-----------|------------------|----------------------------|----------------------------|---------|------------------|------|-------|
| <p>Step 12A:</p> <p>The Report Manager page appears.</p> <p>If the report name does not appear in a hyperlink (i.e. FULLCD04), the process has not finished.</p> <p>Click Refresh to update the status of the process. You may have to click this button several times before the process is Posted.</p> <p>When the status Posted appears next to the process you initiated, you can click the Report name to access the report.</p> <p>The report will open in a new window.</p> | <p>List</p> <p>View Reports For</p> <p>Folder: <input type="text"/> Instance: <input type="text"/> to: <input type="text"/> Refresh</p> <p>Name: <input type="text"/> Created On: <input type="text"/> Last: 1 Days</p> <p>Reports Customize Find View All First 1-4 of 4 Last</p> <table border="1"> <thead> <tr> <th>Report</th> <th>Report Description</th> <th>Folder Name</th> <th>Completion Date/Time</th> <th>Report ID</th> <th>Process Instance</th> </tr> </thead> <tbody> <tr> <td>1 FULLCD04</td> <td>SALARY EXPEND & PROJECTION</td> <td>General</td> <td>07/31/07 11:22AM</td> <td>2228</td> <td>51613</td> </tr> </tbody> </table> | Report | Report Description | Folder Name | Completion Date/Time | Report ID | Process Instance | 1 FULLCD04 | SALARY EXPEND & PROJECTION | General | 07/31/07 11:22AM | 2228 | 51613 |
| Report | Report Description | Folder Name | Completion Date/Time | Report ID | Process Instance | | | | | | | | |
| 1 FULLCD04 | SALARY EXPEND & PROJECTION | General | 07/31/07 11:22AM | 2228 | 51613 | | | | | | | | |

LCD Salary Expenditure Projection Report
8.9



Business Process Guide

The Salary Expenditure Project report appears

Report ID: FULLC003 California State University CSU-Fullerton Report Date: 07/30/07
Page 1 of 32 Salary Expenditures & Projections Report for The Fiscal Year 2006 Report Time: 13:49:34
As of The Month Of January 2007

Division: Information Technology
College: Administration - IT
Department: 10008, Administration - IT

| Dept | Fund | Prgm | Class | Proj | Account | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Total |
|--|------|----------------------|-------|------|-------------------|-------------|-------------|-------------|-------------|-------------|------------------|------------------|------------------|------------------|------------------|------------------|--|-------------------|
| Posn# | R/T | Employee Name | | | Est Posn \$ | | | | | | | | * | * | * | * | * | Projected |
| 601201 - Management and Supervisory | | | | | | | | | | | | | | | | | Original Budget: | 0.00 |
| | | | | | | | | | | | | | | | | | Revised Budget: | 0.00 |
| 10008 | | TRFPD | | | | | | | | | | | | | | | | |
| 00024553 | R | Apple, Mary | | | 132,888.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 11,074.00 | 11,074.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 22,148.00 |
| 00023799 | R | Bedrest, Jim | | | 113,940.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 9,495.00 | 9,495.00 | 9,495.00 | 9,495.00 | 9,495.00 | 9,495.00 | 9,495.00 | 66,465.00 |
| 00024661 | R | Cranapple, Elizabeth | | | 95,412.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 7,951.00 | 7,951.00 | 7,951.00 | 7,951.00 | 7,951.00 | 7,951.00 | 7,951.00 | 55,657.00 |
| 00026457 | R | Duncan, Sharon | | | 193,500.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 8,625.00 | 8,625.00 | 8,625.00 | 8,625.00 | 8,625.00 | 8,625.00 | 8,625.00 | 60,375.00 |
| 00023914 | R | Ember, Lisa | | | 121,860.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 10,155.00 | 10,155.00 | 10,155.00 | 10,155.00 | 10,155.00 | 10,155.00 | 10,155.00 | 71,085.00 |
| | | Total | | | 567,600.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 47,300.00 | 47,300.00 | 36,226.00 | 36,226.00 | 36,226.00 | 36,226.00 | 36,226.00 | 275,730.00 |
| Subtotal of Fund for Management and Supervisory | | | | | | | | | | | | | | | | | Total Fund Original Budget | 0.00 |
| | | | | | | | | | | | | | | | | | Total Fund Revised Budget | 0.00 |
| | | | | | 567,600.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 47,300.00 | 47,300.00 | 36,226.00 | 36,226.00 | 36,226.00 | 36,226.00 | 36,226.00 | <u>275,730.00</u> |
| | | | | | | | | | | | | | | | | | Available | -275,730.00 |
| | | | | | | | | | | | | | | | | | ===== | |
| Subtotal of Management and Supervisory | | | | | | | | | | | | | | | | | Total Management and Supervisory Original Budget | 0.00 |
| | | | | | | | | | | | | | | | | | Total Management and Supervisory Revised Budget | 0.00 |
| | | | | | 567,600.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 47,300.00 | 47,300.00 | 36,226.00 | 36,226.00 | 36,226.00 | 36,226.00 | 36,226.00 | <u>275,730.00</u> |
| | | | | | | | | | | | | | | | | | Available | -275,730.00 |
| | | | | | | | | | | | | | | | | | ===== | |
| 601300 - Support Staff Salaries | | | | | | | | | | | | | | | | | Original Budget: | 0.00 |
| | | | | | | | | | | | | | | | | | Revised Budget: | 0.00 |
| 10008 | | TRFPD | | | | | | | | | | | | | | | | |
| 00022841 | R | Carol, Webster | | | 63,612.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5,130.00 | 6,156.00 | 6,156.00 | 6,156.00 | 6,156.00 | 6,156.00 | 6,156.00 | 42,066.00 |
| 00023712 | R | Derecks, Henry | | | 36,012.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2,904.00 | 3,486.00 | 3,486.00 | 3,486.00 | 3,486.00 | 3,486.00 | 3,486.00 | 23,820.00 |
| 00024102 | R | Manning, Jennifer | | | 50,664.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4,046.00 | 4,850.00 | 4,850.00 | 4,850.00 | 4,850.00 | 4,850.00 | 4,850.00 | 33,146.00 |
| 00023971 | R | Zel, Timothy | | | 17,118.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1,367.00 | 1,640.00 | 1,640.00 | 1,640.00 | 1,640.00 | 1,640.00 | 1,640.00 | 11,207.00 |
| | | Total | | | 167,406.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 13,447.00 | 16,132.00 | 16,132.00 | 16,132.00 | 16,132.00 | 16,132.00 | 16,132.00 | 110,239.00 |

* Indicates Projected Month



The following table lists CMS field names and their definitions used for the LCD Salary Expenditure Projection Report:

| Field | Definition |
|---------------|--|
| Employee Name | Displays the employee's name as Last Name, First Name. |
| R/T | This field identifies whether an employee is Regular (R) or Temporary (T). |
| Department | This field displays the department number. |
| Account | This is the account number and description the employee salaries are being charged to. |
| Position # | This field identifies the CMS position that an employee occupies within a specific department. Unlike the SCO position number, the CMS position number has no meaning behind it. It is a randomly generated eight digit number that has data elements attached to it which define an appointment for a person. |
| Fund | This field identifies the funding source for the employee's position. |
| Class | This field is an extension of the department number. Information in this column only appears if applicable. |
| Est. Posn \$ | This field identifies the estimated dollar amount associated with each employee's position. |
| Program | This field is used by Accounting Services for reporting purposes at the Chancellor's Office. |
| Project | This field is an extension of the account. Departments use this field to track expenditures at a very specific level. |