

OrBIT Report

The OrBIT report gives you information on the personnel services of an organization for the fiscal year.

This report lists by account code categories like A&P Salary, Faculty, and C.S. Regular Salary. For each account code you will see Position Numbers, E-number, Name, *Current Employment Status, YTD Expense, Remaining Encumbrance and Total Cost for Fiscal Year listed.

1. Open your web browser, enter
<http://www.eiu.edu/banner/>
2. Under Reporting select **Argos – Production**
3. Enter Username and Password.
4. Click on the + sign in front of “Financial Managers Reports” on the left-hand side.
5. Click on the + sign in front of “Orbit”.
6. Click on the “Orbit” Report, then click Run Report

The screenshot displays the Banner Financial Managers Reports interface. On the left, a tree view shows the navigation path: **Financial Managers Reports** > **Orbit**. The **Orbit** folder is expanded, showing sub-items like **Dashboard**, **Orbit**, **Orbit lite**, **Dashboard**, and **Orbit Lite**. The **Orbit** item is highlighted with a blue bar. On the right, the **Orbit Report** details are shown, including the author (Ipadmaraju), creation date (11/4/2013 3:58:10 PM), and last modified date (3/6/2014 11:43:35 AM). Below this, there are three sections of actions: **Report Viewer actions** (Run Report, Run Saved, Shortcut), **Report Writer actions** (Edit Report, Edit Data, Delete), and **DataBlock Designer actions** (Schedule, Security). A **Notes** section with a green plus icon is also visible at the bottom.

7. Select your parameters

- a. Click on the down arrow next to "Select Fiscal Year" to choose the desired year.
- b. Click on the desired organization.

8. Click on one of the icons at the top right. Preview, Save, E-Mail or Print

The screenshot shows the Orbit.Orbit application window. At the top, there are navigation icons for Dashboard Options (Saved Settings), Report Options (Orbit), and actions (Preview, Save, E-Mail, Print). The main area features a 'Fiscal Year' dropdown menu set to 2014 and a list of organizations. The '110000 - President Operations' organization is selected. To the right, contact information for L Padmaraju, Ipadmaraju@eiu.edu, and Dave Watson is provided. Below the list is a 'Notes' section with instructions on how to use the report. At the bottom, a summary table displays Finance Data and HR Data.

Notes:

The Orbit (ORganizational Budget Information Table) Report gathers budget information from the Human Resources and Finance modules of Banner and compares them on the same report.

Similar to the older "PESO" report, Orbit shows expenses, encumbrances, and remaining balances for a particular organization broken down by individual employees.

To begin, select a Fiscal Year from the drop down menu. Then select an organization you would like to view. Only the organizations that you have access to will be listed. Finally, click next.

In the summary section of the report, you will notice the totals for a particular organization. Below is a snapshot of the summary section with example data added. On the left you will see the Beginning Budget, Adjustments, Expenditures, Encumbrances remaining to be paid, and a Balance. This information comes from the Finance system. On the right you will see Expenditures, Encumbrances remaining, and total cost for the chosen fiscal year from the Human Resources system. The data is then matched to Finance to give a remaining balance called the "(Over)/Under".

**In the event that Human Resources runs a payroll before Finance does, these numbers will not match. In most cases the Human Resources information will show more Expenditures and less Encumbrances. This is simply due to a timing issue and is typically resolved in a business day. This does not mean the two budgets do not match.

Finance Data						HR Data	
	OriginalBudget	Adjustments	Expended	Encumbrance	Balance		
Salary&Wages	\$5,000.00	\$1,000.00	\$2,000.00	\$1,000.00	\$3,000.00	\$2,200.00	\$3,200.00
Student	\$500.00	\$0.00	\$200.00	\$0.00	\$300.00		
	\$5,500.00	\$1,000.00					
		\$6,500.00	\$2,200.00	\$1,000.00	\$3,300.00		
						Finance Total Budget:	\$6,500.00
						(Over)/ Under	\$3,300.00

OrBIT Lite Report

The OrBIT Lite report gives you information on the personnel services of an organization for a specific payroll (monthly or bi-weekly).

This report lists by account code categories like A&P Salary, Faculty, and C.S. Regular Salary. For each account code you will see Position Numbers, E-Numbers, Name and Job FTE listed.

1. Open your web browser, enter
<http://www.eiu.edu/banner/>
2. Under Reporting select **Argos – Production**
3. Enter Username and Password
4. Click on the + sign in front of “Financial Managers Reports” on the left-hand side.
5. Click on the + sign in front of “Orbit lite”.
6. Click on the “Orbit Lite” report, then click Run Report.

The screenshot displays the Banner Financial Managers Reports interface. On the left, a tree view shows the navigation structure. The 'Financial Managers Reports' folder is expanded, and the 'Orbit lite' folder is selected. Within 'Orbit lite', the 'Orbit Lite' report is highlighted. On the right, the 'Orbit Lite Report' details are shown, including the author (lpadmaraju), creation date (11/4/2013 3:58:32 PM), and last modified date (3/6/2014 11:44:47 AM). Below the details are three sections of actions: 'Report Viewer actions' (Run Report, Run Saved, Shortcut), 'Report Writer actions' (Edit Report, Edit Data, Delete), and 'DataBlock Designer actions' (Schedule, Security). A 'Notes' section with a plus sign is also visible at the bottom.

7. Select your parameters

- a. Click on the down arrow next to “Select Fiscal Year” to choose the desired year.
- b. Click on the down arrow next to “Select Payroll ID”, and choose either BW for bi-weekly or MN for monthly.
- c. Click on the down arrow next to “Select Payroll Number” to choose the desired payroll period.

- i. The payroll schedules are available at:

<http://www.eiu.edu/humanres/payroll/payrolldistribution.php>

- d. Click on the desired organization.
- e. Click on “Next” button at the bottom right-hand side.
- f. Click on “preview” to view the report.

8. Click on one of the icons at the top right. Preview, Save, E-Mail or Print

*Current Employment status is the status as of the max date of contract not as of the payroll selected.

Orbit lite.Orbit Lite

Preview; Save; E-Mail; Print

Dashboard Options: Saved Settings

Report Options: Orbit Lite

2014 Select Fiscal Year

MN Select Payroll ID

05 Select Payroll Number

100000 - Revenue Income Fund
110000 - President Operations
110010 - General Administration
110011 - Sellers Case
110020 - Institutional Memberships
110030 - Recruitment Retention
110040 - Micro Computer Maintenance-Pres
110050 - FC-Planning Support

ORBIT
lite

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For Help and Support Contact:
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Notes:

The Orbit Lite Report gathers much of the same information as the original Orbit Report. It gathers budget information from the Human Resources module of Banner and generates totals for each account. The difference is, the Orbit Lite shows budget information in regards to a specific payroll.

To begin, select a Fiscal Year, a Payroll Type (BiWeekly or Monthly), and a Payroll Number from the drop down menus. Then select an organization you would like to view. Only the organizations that you have access to will be listed. Finally, click next.