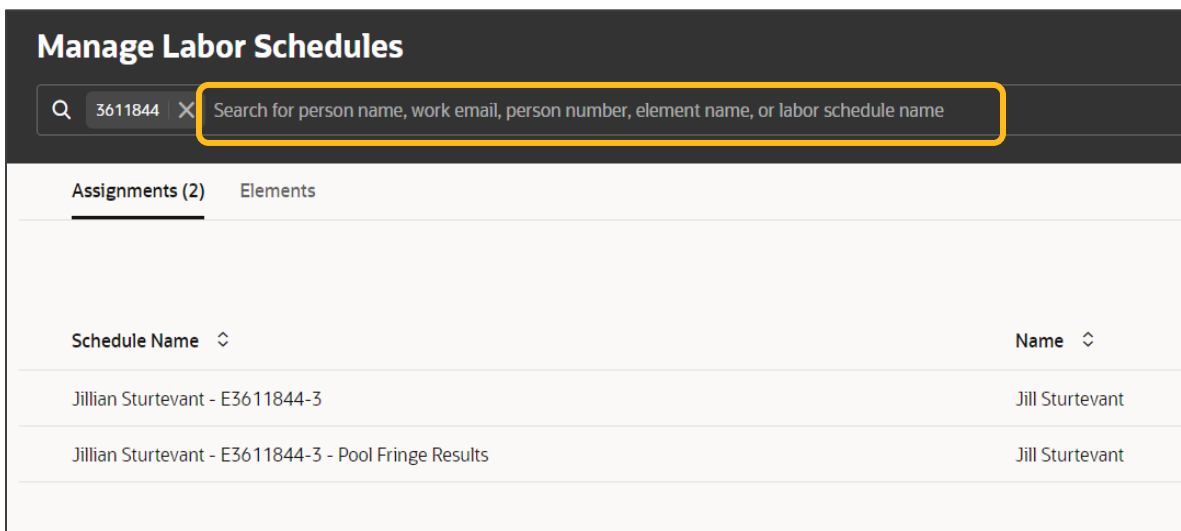# LABOR DISTRIBUTION: Revising a Labor Distribution Schedule for an Existing Assignment

Overview

- This job aid is intended for Departmental LD Analyst.
- This document outlines the steps to edit an existing Labor Schedule Version for an assignment.

In-System Processing

1. To update an existing Labor Schedule Version, go to the Manage Labor Schedule page and use the search box at the top of the page to search for the person using the person's name, work email, person number, element name, or labor schedule.
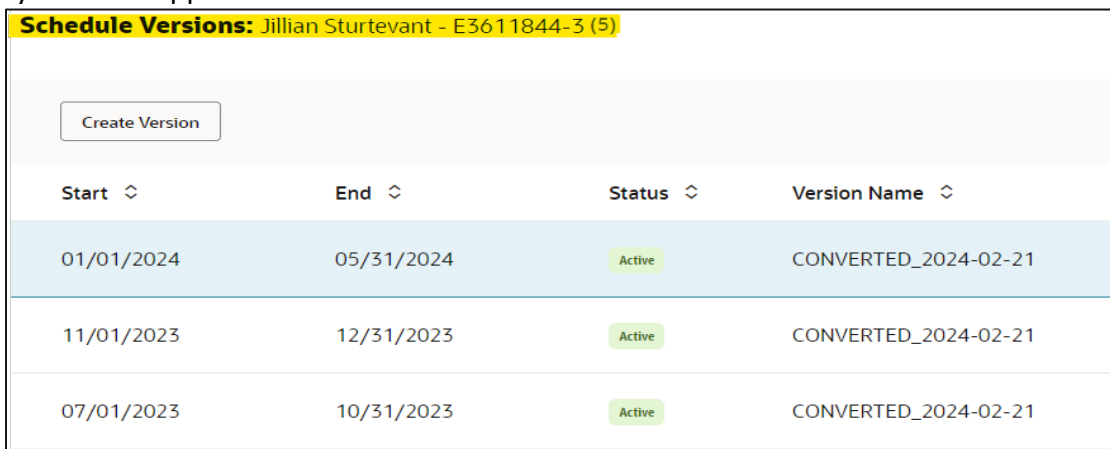

2. Click on the labor schedule you wish to edit. All labor schedule versions entered in the system will appear for the selected schedule.

3. Click and highlight the schedule version you wish to edit. Click the (3) dots below the "Action" column and select Edit. Set the schedule status to "Inactive" and click the "Save" button.

4. To add the revised schedule, Click the "Create Version" button at the top of the page and enter the Version Name, Start Date, and End Date. Click Create. Alternatively, click the (3) dots below the "Actions" column and select Duplicate Version.

Option #1

Option #2

5. Using option #2, a duplicate version of the inactive assignment is created.

> **Note:** *To update the labor schedule version with future costing dates, the existing version will need to be made inactive for historical records followed by creating a duplicate version and modifying the end date accordingly so that the Labor Schedule Version covers the period where costs have previously been distributed. The duplicate schedule will then need to be submitted for approval.*

6. Edit the version name that is appropriate for the reason why the schedule change is needed. Update the schedule's start and end date if necessary. Add comments for schedule update justification or any other information you want the approver to know. Click "save"

7. Since option #2 in step 5 is selected (duplicating the previous version), the distribution rule for the inactive schedule appears on the new schedule. Click the (3) dots below "Actions" under the Distribution Rule and select "Edit" if the costing change is to the same funding source type (Project). Select "Delete" if updating the costing to a different funding source type.

Distribution Rules: Costing Update_120523 (2)

Create Rule

Line	Project	Task	Award	Funding Source	Expenditure Organization	Expenditure Type	Percentage	Actions
1	1001129	SP	102610	Pacific Northwest National Laboratory	Environmental Sciences	Graduate Assistant Salaries	50.00%	...
2	1001435	SP	102872	National Science Foundation	Environmental Sciences	Graduate Assistant Salaries		

✏ Edit
⊗ Delete

If the costing line is deleted, add a new distribution rule by clicking "Create Rule". Update the costing information and percentage allocation and click "create".

Create Distribution Rule

Project	Nonproject

GL Account
320-32340-100-1000000-92150-101-0000-000 ☐

Percentage
50

8. Submit the schedule version for Approval. Click and highlight the labor schedule version. Under the "Action" column, click on the (3) dots under Action and select Edit. Verify the header level details, then update the status to "Active" and click "Save". The Labor Schedule version status will be updated to "Submitted".

9. To track the approval status of a submitted schedule within the workflow, go to the Notification Bell and click "Show All

10. Click on "Worklist" located on the upper right-hand corner of the page. A separate window pops up. Click on "Initiated Tasks" to see a list of all Labor schedules entered that are pending approval.

11. Click on the schedule to view the Approval status.

Labor Schedule Name: Jillian Sturtevant - E3611844-3
Labor Schedule Version Name: Costing Update_120523
Creation Date: 12/05/2023
Submitted By: 1000139572
Labor Schedule Type: Person assignment
Labor Schedule Type Attributes: Jill Sturtevant - Graduate Assistant
Total Percentage: 100
Version Start Date: 12/05/2023
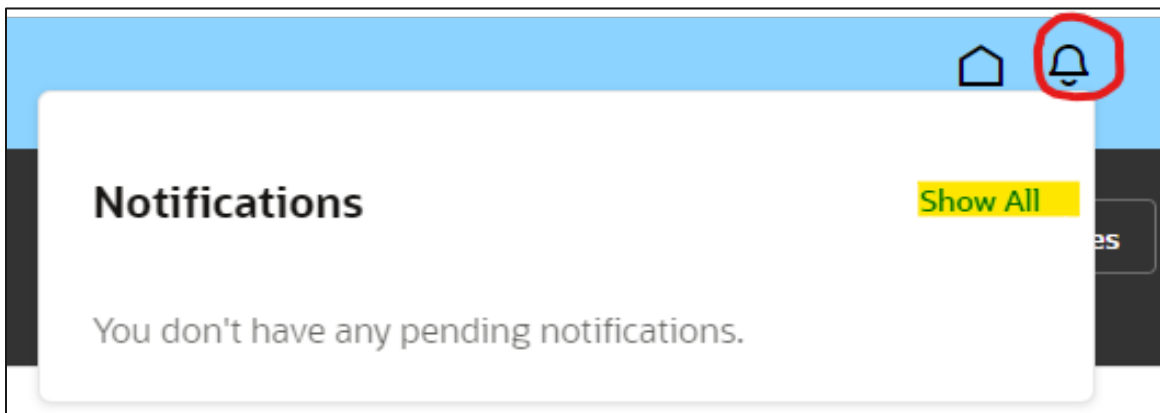Version End Date: 12/05/2023
Version Comments: To end project 1001435 costing and change costing to department operation fund per PI request.

Distribution Rules Details

Line Number	Project Name	Task Number	Contract Name	Funding Source Name	Expenditure Type	Expenditure Organization	GI Account Segment	Percentage
1	PNNL-DOE-IM3-McManamay	SP	PNNL-DOE-IM3-McManamay	Pacific Northwest National Laboratory	Graduate Assistant Salaries	Environmental Sciences		50
2							320-32340-100-1000000-92150-101-0000-00000-00000	50

Approval History

○ Ryan McManamay

○ Heidi Mueller

🕐 Assigned to **Mayra Hough** — 12/06/2023 3:08 AM

⬆ Submitted by **Abby Cherinet** — 12/06/2023 3:08 AM