

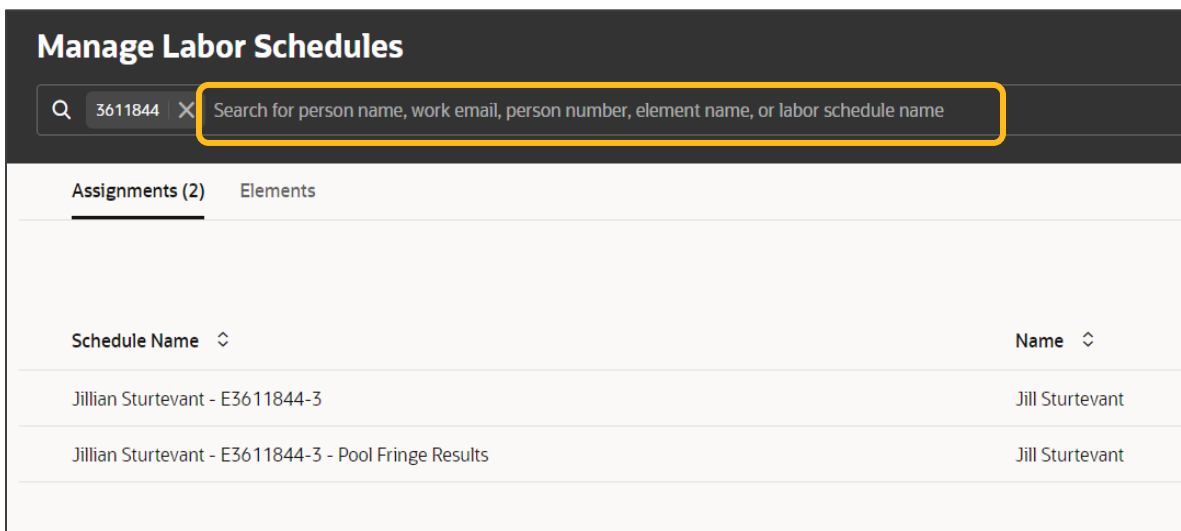
LABOR DISTRIBUTION: Revising a Labor Distribution Schedule for an Existing Assignment

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.



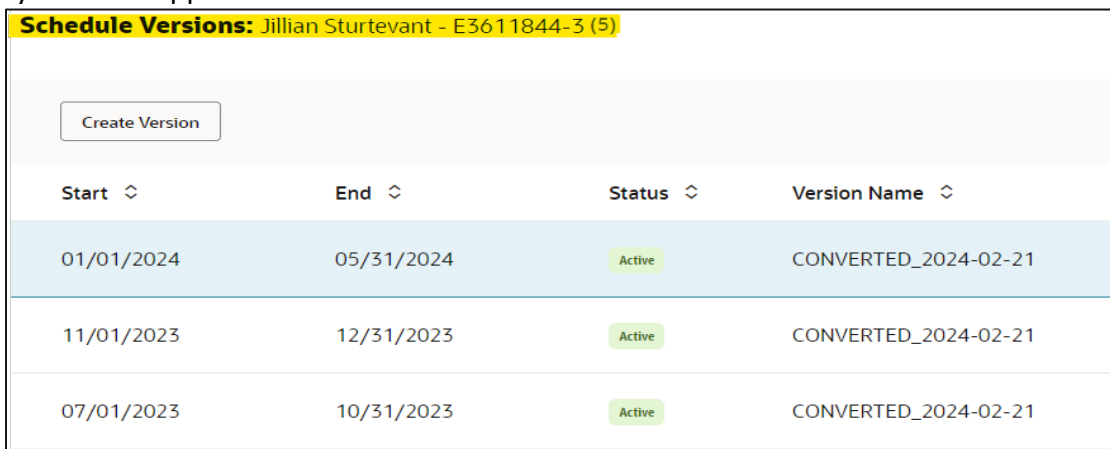
Manage Labor Schedules

Q 3611844 X Search for person name, work email, person number, element name, or labor schedule name

Assignments (2) Elements

Schedule Name	Name
Jillian Sturtevant - E3611844-3	Jill Sturtevant
Jillian Sturtevant - E3611844-3 - Pool Fringe Results	Jill Sturtevant

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



Schedule Versions: Jillian Sturtevant - E3611844-3 (5)

Create Version

Start	End	Status	Version Name
01/01/2024	05/31/2024	Active	CONVERTED_2024-02-21
11/01/2023	12/31/2023	Active	CONVERTED_2024-02-21
07/01/2023	10/31/2023	Active	CONVERTED_2024-02-21

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- 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.

The screenshot shows the 'Schedule Versions' interface for 'Jillian Sturtevant - E3611844-3 (4)'. It features a table with columns for Start, End, Status, Version Name, Comments, and Actions. The table lists three versions, all with a status of 'Active'. The 'Actions' column for the first row (11/01/2023 to 11/30/2023) is expanded, showing options: Edit, Duplicate Version, and Delete. An 'Edit Version' modal is open on the right, showing the 'Version Name' as 'Converted_20231023', 'Start' as '11/01/2023', 'End' as '11/30/2023', and 'Status' set to 'Inactive'. A 'Comments' field is also visible at the bottom of the modal.

- 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

The screenshot shows the 'Schedule Versions' interface for 'Jillian Sturtevant - E3611844-3 (4)'. The 'Create Version' button at the top left is highlighted with a yellow box. The table below shows one version with a status of 'Inactive' (11/01/2023 to 11/30/2023) and an 'Actions' column with a three-dot menu.

Option #2

The screenshot shows the 'Schedule Versions' interface for 'Jillian Sturtevant - E3611844-3 (4)'. The 'Create Version' button is at the top left. The table lists two versions: one 'Inactive' (11/01/2023 to 11/30/2023) and one 'Active' (07/01/2023 to 10/31/2023). The 'Actions' column for the 'Inactive' version is expanded, showing options: Edit and Duplicate Version. The 'Duplicate Version' option is highlighted with a yellow box.

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

11/01/2023	11/30/2023	New	Copy of Converted_20231023	...
07/01/2023	10/31/2023	Active	Converted_20231023	Edit Duplicate Version Delete

Distribution Rules: Copy of Converted_20231023 (2)

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"

Edit Version

Version Name
Costing Update_120523

Start
11/01/2023

End
11/30/2023

Status
New

Comments
To end project 1001435 costing and change costing to department operation fund per PI [request](#).

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- 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.

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

- 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”.

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Schedule Versions: Jillian Sturtevant - E3611844-3 (5)

Create Version

Start	End	Status	Version Name	Comments	Actions
11/01/2023	11/30/2023	Inactive	Converted_20231023		...
11/01/2023	11/30/2023	New	Costing Update_120523	To end project 1001435 costing and change costing to department	...
07/01/2023	10/31/2023	Active	Converted_20231023		Edit Duplicate Version

Schedule Versions: Jillian Sturtevant - E3611844-3 (5)

Create Version

Start	End	Status	Version Name
11/01/2023	11/30/2023	Inactive	Converted_20231023
11/01/2023	11/30/2023	New	Costing Update_120523
07/01/2023	10/31/2023	Active	Converted_20231023

Distribution Rules: Costing Update_120523 (2)

Edit Version

Version Name: Costing Update_120523

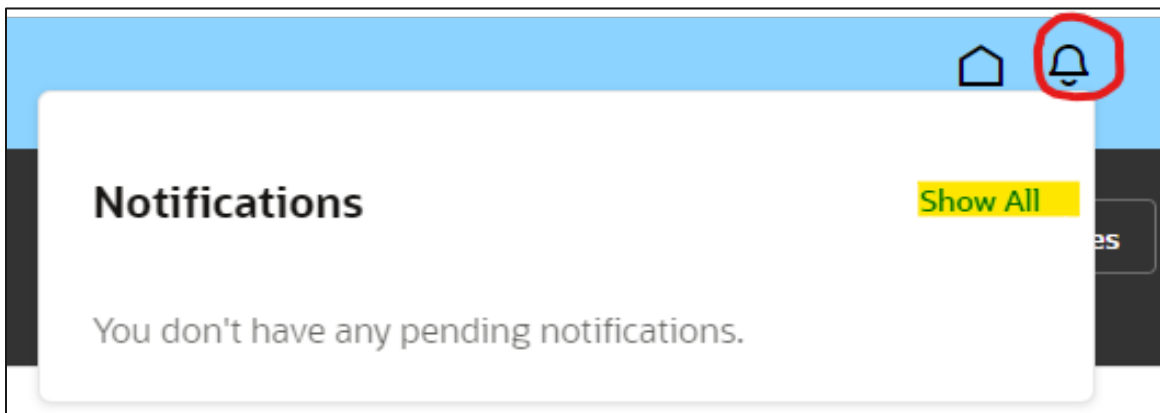
Start: 11/01/2023

End: 11/30/2023

Status: Active

Comments: To end project 1001435 costing and change costing to department operation fund per PI request.

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



Notifications

Show All

You don't have any pending notifications.

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- 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.

The screenshot shows the ORACLE BPM Worklist interface. On the left, there is a sidebar with 'Views' and 'Inbox' sections. The 'Inbox' section shows 'My Tasks (0)' and 'Initiated Tasks (12)'. The main area displays a table of tasks with columns for 'Status', 'Title', and 'Number'. The tasks listed are:

Status	Title	Number
	Labor Schedule Version Status Approval for Kailah Hall	9831737
	Labor Schedule Version Status Approval for Kailah Hall	9831736
	Labor Schedule Version Status Approval for Monserrat /	9828817
	Labor Schedule Version Status Approval for Monserrat /	9828816

- Click on the schedule to view the Approval status.

The screenshot shows the details for a labor schedule. The metadata includes:

- 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