

Labor Distribution: Manage Costing on an ICP

Overview

- This job aid is intended for Departmental LD Analyst.
- This document outlines the steps to enter a labor schedule for a new ICP or modify an existing ICP labor schedule.
- A second labor schedule under **Supplemental Fringe Results** pay element is required for each ICP schedule entry. This instruction shows steps how to enter the additional schedule.

I. Labor Distribution Information

1. A weekly report will be provided by LD Accountants for all new ICPs that will need to have costing entered. Reach out to the department Financial Manager to obtain costing information if unknown.
2. ICP labor schedule dates must align with the actual ICP entry effective start and end date located on the new ICP report provided by the LD Accountant.

ICP Updates					
Name	Person Number	Assignment Number	ICP Name	ICP Effective Start Date	ICP Effective End Date
Daniel, Julia	3238028	E3238028	Overload Faculty	11/01/2023	12/31/2023

3. Costing for ICPs must always be applied using the same pay element name as the ICP name on the LD report.
4. ICPs are rarely charged to sponsored projects. Requests to add sponsored project costing to an ICP must be confirmed by a URA.

In-System Processing

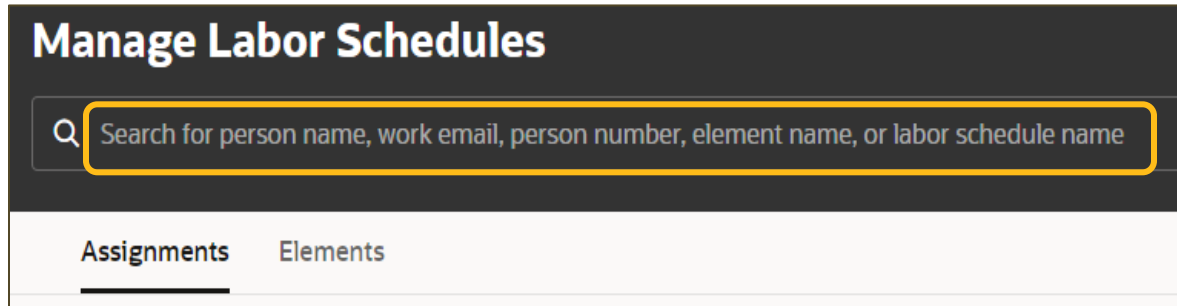
II. Add New ICP Labor Schedule

- I. From the Ignite homepage, select the **Projects** tab, then select the **Labor Distribution** tile.



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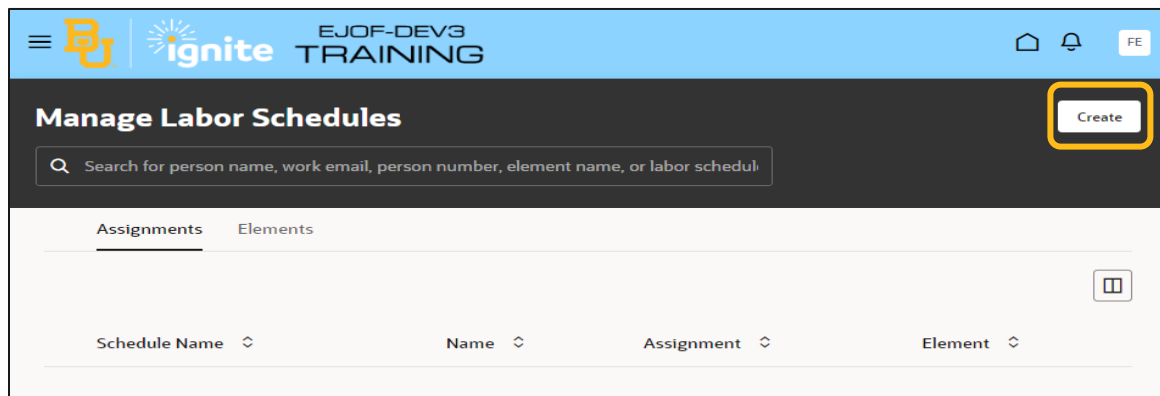
2. Search for the employee using Name, Person number, element name, or labor schedule.



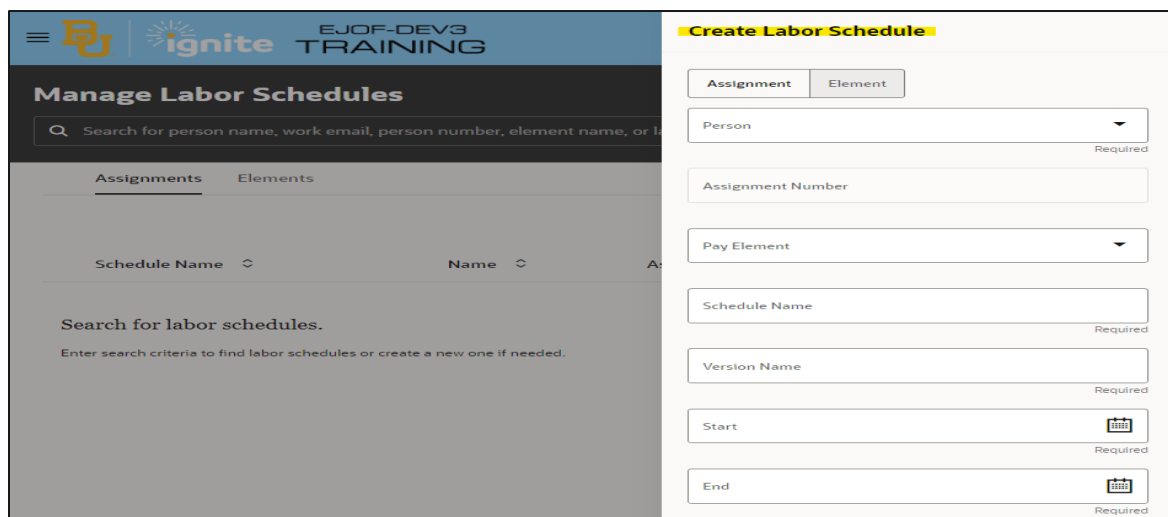
The screenshot shows the 'Manage Labor Schedules' page. At the top, there is a search bar with a magnifying glass icon and the text 'Search for person name, work email, person number, element name, or labor schedule name'. Below the search bar, there are two tabs: 'Assignments' and 'Elements'. The 'Assignments' tab is currently selected and underlined.

3. All existing Labor Schedule versions will appear for the selected Person. To create a labor schedule for the new ICP pay element, click "Create" located in the upper right-hand corner of the page. A "Create Labor Schedule" window will appear.

Note: If a labor schedule already exists for the assignment number and pay element on the search result, select the schedule name to enter the new ICP's schedule version.



This screenshot shows the 'Manage Labor Schedules' page with the 'Create' button in the upper right-hand corner highlighted with a yellow box. The search bar and tabs are visible, and the page is ready for a search or creation action.



The screenshot shows the 'Create Labor Schedule' modal form. The form is titled 'Create Labor Schedule' and has two tabs: 'Assignment' and 'Element'. The 'Assignment' tab is selected. The form contains several required fields: 'Person', 'Assignment Number', 'Pay Element', 'Schedule Name', 'Version Name', 'Start', and 'End'. Each field has a 'Required' label next to it. There are also calendar icons for the 'Start' and 'End' fields.

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- Click on the "Assignment" tab and enter the person's name or number. Select the assignment where the new labor schedule will be entered. The assignment number will default based on the selection. Select the Pay Element that matches the ICP name entered. The schedule name will default to "Name-Assignment #-Pay Element". Enter the version name, schedule start and end date, and click "Create".

Create Labor Schedule

Assignment | Element

Person
Yanbin Xu

Assignment Number
E1000145853

Costed Only

Pay Element
Overload Faculty

Schedule Name
Yanbin Xu - E1000145853 - Overload Faculty

Version Name
ICP-04/08/24-A.Cherinet

Start
08/01/2024

End
05/31/2025

- Validate that the header level schedule version details are populated correctly based on the previous step. Enter any necessary comments by clicking on the three dots under Actions and Edit.

Schedule Versions: Yanbin Xu - E1000145853 - Overload Faculty (1)				
<input type="button" value="Create Version"/>				
Start	End	Status	Version Name	Comments
08/01/2024	05/31/2025	New	ICP-04/08/24-A.Cherinet	Adding new ICP labor schedule

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6. Enter the distribution rule. Click “Create Rule” under the distribution rules section. A “Create Distribution Rule” window will open. Click on “Project” or “Nonproject” depending on the funding source. If the costing is split between various funding sources, create additional distribution rules until the total percentage allocation adds up to 100%. **Note: ICPs are rarely charged to projects and must be verified with URAs before the schedule is entered.** Click “Create”.

Create Distribution Rule

Project Nonproject

GL Account
320-32250-100-1000000-91080-101-0000-0000

Percentage
100

Distribution Rules: ICP-04/08/24-A.Chernet (1)

Create Rule

Task	Award	Funding Source	Expenditure Organization	Expenditure Type	GL Account	Percentage
					320-32250-100-1000000-91080-101-0000-000000	100.00%
Total						100.00%

7. Submit the schedule version for approval. Under the Schedule Version header, click on and highlight the labor schedule version. Under the Actions column on the far right, click on the (3) dots under “Actions” and select Edit. Verify the header level details, then update the status to “Active” and click the “Save” button. The Labor Schedule Version status will be updated to “Submitted”.

Schedule Versions: Yanbin Xu - E1000145853 - Overload Faculty (1)

Create Version

Start	End	Status	Version Name	Comments	Actions
08/01/2024	05/31/2025	New	ICP-04/08/24-A.Chernet	Adding new ICP labor schedule	...

Distribution Rules: ICP-04/08/24-A.Chernet (1)

Create Rule

Actions dropdown:
Edit
Duplicate Version
Delete

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8. Enter the **Supplemental Fringe Results** labor schedule associated to the ICP. Repeat steps 1 – 3. Create a labor schedule using the “Supplemental Fringe Results” pay element. The costing start and end date must align with the ICP element schedule version entry.

Note: If the person is receiving more than one ICP with different distribution rule, calculate the percentage allocation between the various costing strings and enter the distribution rule accordingly. If the effective dates on the various ICPs with different costing strings do not match, use the distribution rule with the longer effective period to apply the supplemental fringe labor schedule entry.

Create Labor Schedule

Assignment | Element

Person
Yanbin Xu

Assignment Number
E1000145853

Costed Only

Pay Element
Supplemental Fringe Results

Schedule Name
Yanbin Xu - E1000145853 - Supplemental Fringe Resul

Version Name
ICP-04/08/24-A. Cherinet

Start
08/01/2024

End
05/31/2025

9. Enter a distribution rule. Enter the department default COA with account number 91300 for distributed benefits. Review and submit entry.

Create Distribution Rule

Project | **Nonproject**

GL Account
320-32250-100-1000000-91300-101-0000-000

Percentage
100

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III. Add New ICP Schedule Version

If a new ICP is issued and a labor schedule is already in the system for the ICP element type, enter a schedule version the new ICP based on it's effective start and end date.

For example: Yulissa Torres (shown below) has an active Overload Faculty ICP labor schedule already in the system for costing period through 05/31/24. If Yulissa receives a new Faculty Overload ICP for 08/01/24 – 12/31/24, we will use the existing labor schedule and create a new version for the new costing period.

Yulissa Torres - E1000132844-3 - Overload Faculty	Yulissa Torres	Lecturer	Overload Faculty
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Schedule Versions: Yulissa Torres - E1000132844-3 - Overload Faculty (1)

Create Version

Start	End	Status	Version Name
01/01/2024	05/31/2024	Active	CONVERTED_2024-02-21

- I. Create a new schedule version. Duplicate the current active schedule and edit the contents of the duplicated version as needed. Click "Save" when completed.

Schedule Versions: Yulissa Torres - E1000132844-3 - Overload Faculty (1)

Create Version

Start	End	Status	Version Name	Comments	Actions
01/01/2024	05/31/2024	Active	CONVERTED_2024-02-21		...

Distribution Rules: CONVERTED_2024-02-21 (1)

Edit Duplicate Version

Edit Version

Version Name
ICP-04/08/24-A. Cherinet

Start
08/01/2024

End
12/31/2024

Status
New

Comments
Adding new ICP schedule version that starts on 08/01/2024

Labor Distribution: Manage Costing on an ICP

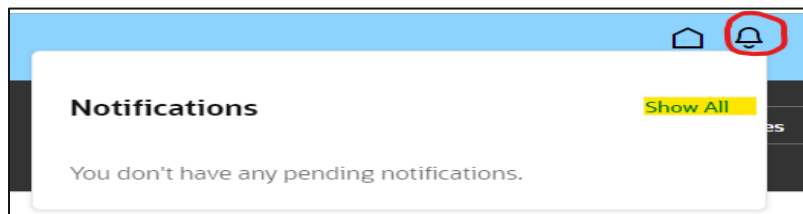
2. Update the distribution rule of the duplicated version as needed. Review and submit the new schedule version for approval.

Task	Award	Funding Source	Expenditure Organization	Expenditure Type	GL Account	Percentage
					320-32250-100-1000000-91080-101-0000-00000-00000	100.00%

3. Create the corresponding **Supplemental Fringe Results** Element version schedule for the added costing period by duplicating the previous active version and updating the content of the entry as needed.

IV. View Approval of Submitted Labor Schedule

1. To track the approval status of a submitted schedule within the workflow, go to the notification bell and click “Show All”



2. 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.

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

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

User	Action	Date/Time
Meg Hoefer		
Amanda Dobbins		
Tamar Carter		
Bridget Popham	Assigned to	12/04/2023 9:53 AM
Abby Cherinet	Submitted by	12/04/2023 9:53 AM