

Labor Distribution: Manage Costing on a New Employee or New Assignment

Overview

- This job aid is intended for Departmental LD Analysts.
- This document outlines the steps to enter a labor schedule for a new employee or new assignment. *Refer to separate job aid for Revising an LD Schedule for an Existing Assignment.*
- You can add costing by selecting an employee, entering an effective date for the change, and adding appropriate percentages and information to a costing string.

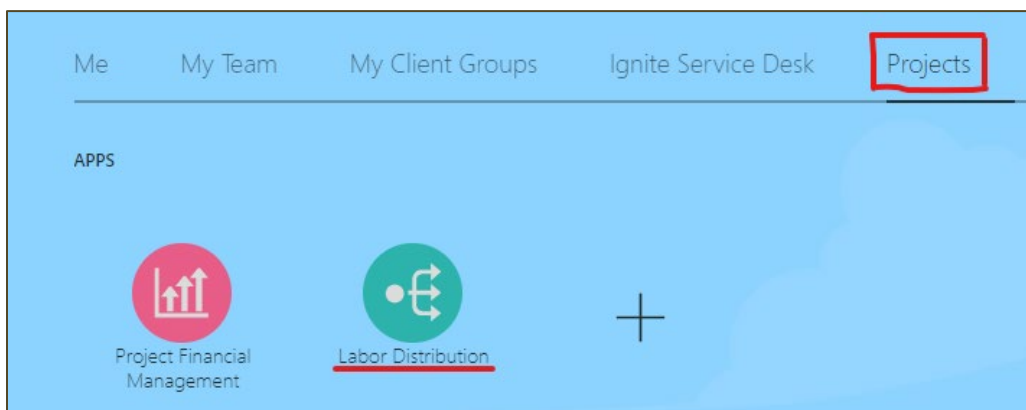
I. Labor Distribution Information

1. A weekly report will be provided by Labor Distribution (LD) Accountants for all new hires or assignments that require a labor schedule entry. Reach out to Financial Managers for costing information.
2. Ensure you have reviewed all active labor schedules and enter the correct effective start date and end date. The Costing End Date is a required field. If an employee has an ongoing assignment and it is known that costing remains the same, use 12/31/2050 for the default costing end date.
3. *Refer to separate job aids for Costing on New ICPs or Revising an Existing Labor Schedule.*

In-System Processing

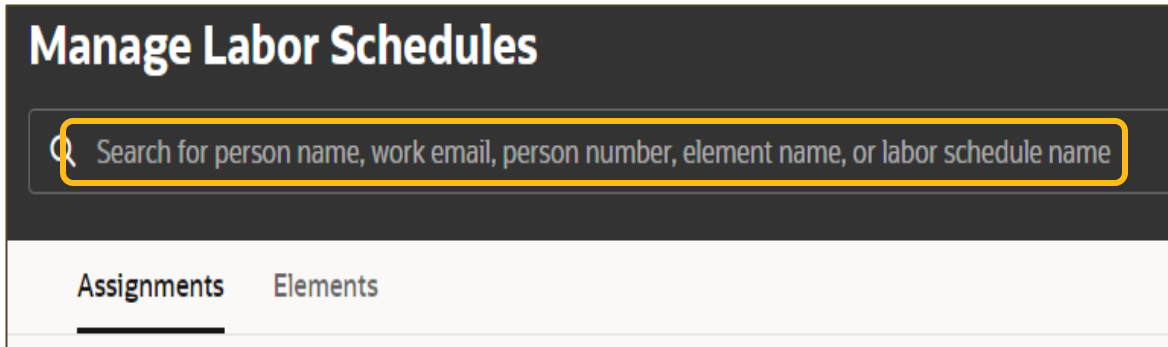
II. Find Employee & Entering Labor Schedule

1. From the Ignite Homepage, select the **Projects** tab, then select the **Labor Distribution** tile.



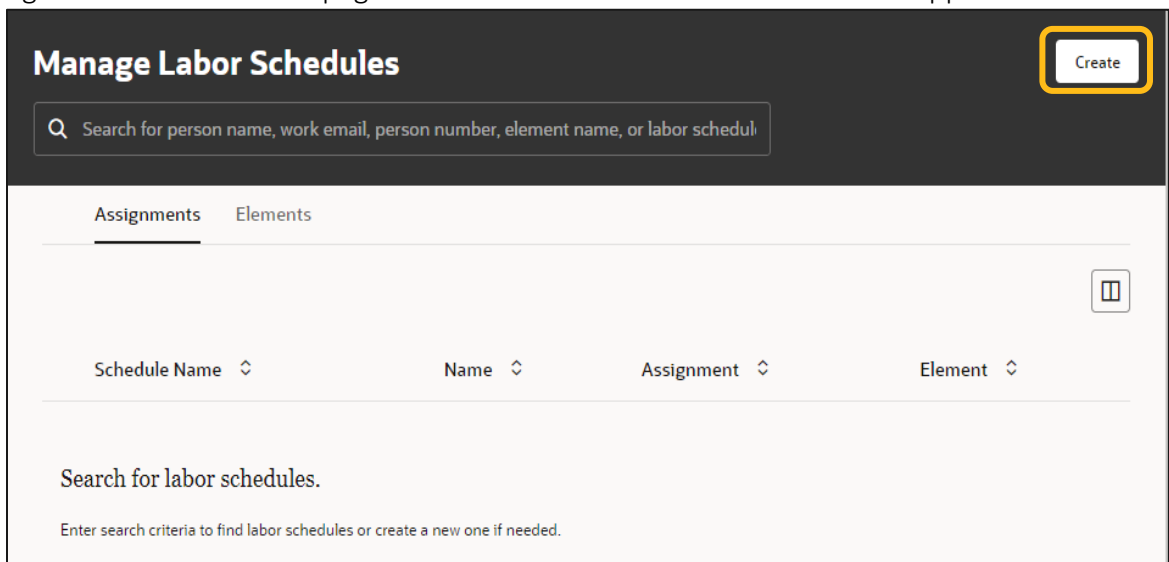
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2. Search for the Employee using Name, Person number, element name, or labor schedule name.

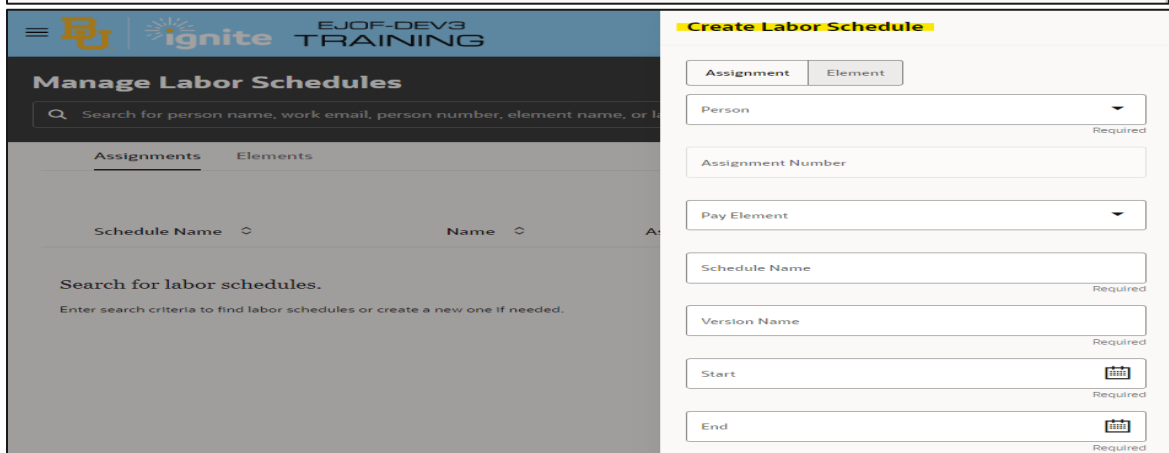


The screenshot shows the 'Manage Labor Schedules' interface. At the top, there is a search bar with the placeholder text 'Search for person name, work email, person number, element name, or labor schedule name'. Below the search bar, there are two tabs: 'Assignments' and 'Elements'. The 'Assignments'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

3. All existing Labor Schedule versions will appear for the selected Person. If the employee or assignment is new, create a new labor schedule by clicking "Create" located in the upper right-hand corner of the page. A "Create Labor Schedule" window will appear.



The screenshot shows the 'Manage Labor Schedules' interface. At the top right, there is a 'Create' button highlighted with a yellow box. Below the search bar, there are two tabs: 'Assignments' and 'Elements'. The 'Assignments' tab is currently selected. Below the tabs, there is a table with columns: 'Schedule Name', 'Name', 'Assignment', and 'Element'. Below the table, there is a search bar with the placeholder text 'Search for labor schedules.' and a note: 'Enter search criteria to find labor schedules or create a new one if needed.'



The screenshot shows the 'Create Labor Schedule' window. The window has a title bar that says 'Create Labor Schedule'. Below the title bar, there are two tabs: 'Assignment' and 'Element'. The 'Assignment' tab is currently selected. Below the tabs, there are several form fields: 'Person' (Required), 'Assignment Number', 'Pay Element', 'Schedule Name' (Required), 'Version Name' (Required), 'Start' (Required), and 'End' (Required). Each field has a 'Required' label next to it.

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- Click on the “Assignment” tab and enter a 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. The schedule name defaults to “Name – Assignment #”. Enter the version name, the scheduled start date, and the end date, then click “Create”. **Note: The Schedule Date should always be the start date of the employee’s first pay period. There should not be a costing date gap between given pay periods.**

The screenshot shows the 'Create Labor Schedule' form. The 'Person' field is set to 'Namrata Mathew'. The 'Assignment Number' is 'E1000130480-3'. The 'Pay Element' is empty. The 'Schedule Name' is 'Namrata Mathew - E1000130480-3'. The 'Version Name' is 'New Assignment_120123_AC'. The 'Start' date is '01/01/2024' and the 'End' date is '05/31/2024'. The 'Create' button is highlighted.

- Validate the header level schedule version details populated correctly based on the previous step. Additional comments/Justification can also be added to the version by clicking on the three dots under Actions and then selecting Edit.

The screenshot shows the 'Schedule Versions' table. The table has columns for 'Start', 'End', 'Status', 'Version Name', 'Comments', and 'Actions'. The first row is highlighted in yellow and contains the following data: Start: 01/01/2024, End: 05/31/2024, Status: New, Version Name: New Assignment_120123_AC. The 'Actions' column for this row has a three-dot menu icon, which is highlighted with a red arrow.

| Start | End | Status | Version Name | Comments | Actions |
|------------|------------|--------|--------------------------|----------|---------|
| 01/01/2024 | 05/31/2024 | New | New Assignment_120123_AC | | ... |

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6. Enter a distribution rule. Click the “Create Rule” button under the distribution rules section. A “Create Distribution Rule” window will open. Click on “Project” or “Nonproject” depending on the funding source.

Create Distribution Rule

Project Nonproject

Project Required

Task

Award

Funding Source

Expenditure Organization Required

Expenditure Type Required

Percentage Required

Schedule Versions: Namrata Mathew - E1000130480-3 (1)

| Start | End | Status | Version Name |
|------------|------------|--------|--------------------------|
| 01/01/2024 | 05/31/2024 | New | New Assignment_120123_AC |

Distribution Rules: New Assignment_120123_AC

| Line | Project | Task | Award | Funding Source | Expenditure Organization | Expenditure Type |
|---------------------|---------|------|-------|----------------|--------------------------|------------------|
| No data to display. | | | | | | |

7. For the Project funding source, enter the project number. Award and Funding source information will auto-populate. Select the task from the drop-down menu. Enter the Expenditure Organization, Expenditure Type, and the percentage allocation. If the percentage allocation entered under the project is less than 100%, click “Create” and enter another distribution rule.

Create Distribution Rule

Project Nonproject

Project 1001210

Task SP

Award 102683

Funding Source National Science Foundation

Expenditure Organization Chemistry and Biochemistry

Expenditure Type Graduate Assistant Salaries

Percentage 75

Schedule Versions: Namrata Mathew - E1000130480-3 (1)

| Start | End | Status | Version Name |
|------------|------------|--------|--------------------------|
| 01/01/2024 | 05/31/2024 | New | New Assignment_120123_AC |

Distribution Rules: New Assignment_120123_AC

| Line | Project | Task | Award | Funding Source | Expenditure Organization | Expenditure Type |
|---------------------|---------|------|-------|----------------|--------------------------|------------------|
| No data to display. | | | | | | |

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- For Non-project costing, click “Create Rule” again, select the “Nonproject” header, and enter the COA string and percentage allocation. Click on “Create”

Create Distribution Rule

Project: **Nonproject**

GL Account: 320-32375-100-1000000-92150-101-0000-000

Percentage: 25

Buttons: Cancel, Create

Schedule Versions: Namrata Mathew - E1000130480-3

| Start | End | Status | Version Name |
|------------|------------|--------|--------------|
| 01/01/2024 | 05/31/2024 | New | New Assign |

Distribution Rules: New Assignment_120123_AC (1)

Buttons: Create Rule

- Review the distribution rule created. The total percentage allocation between various funding sources must add up to 100%.

Distribution Rules: New Assignment_120123_AC (2)

Buttons: Create Rule

| Project | Task | Award | Funding Source | Expenditure Organization | Expenditure Type | GL Account | Percentage | Actions |
|---------|------|--------|-----------------------------|----------------------------|-----------------------------|------------------|------------|---------|
| 1001210 | SP | 102683 | National Science Foundation | Chemistry and Biochemistry | Graduate Assistant Salaries | | 75.00% | ... |
| | | | | | | 320-32375-100-10 | 25.00% | ... |
| | | | | | | | Total | 100.00% |

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- 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. Note that the Labor Schedule Version status will be updated to “Submitted”.

Schedule Versions: Namrata Mathew - E1000130480-3 (1)

Create Version

| Start | End | Status | Version Name | Comments | Actions |
|------------|------------|--------|--------------------------|----------|---------|
| 01/01/2024 | 05/31/2024 | New | New Assignment_120123_AC | | ... |

Distribution Rules: New Assignment_120123_AC (2)

Create Rule

- Edit
- Duplicate Version
- Delete

Schedule Versions: Namrata Mathew - E1000130480-3 (1)

Create Version

| Start | End | Status | Version Name | Comments | Actions |
|------------|------------|-----------|--------------------------|----------|---------|
| 01/01/2024 | 05/31/2024 | Submitted | New Assignment_120123_AC | | |

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

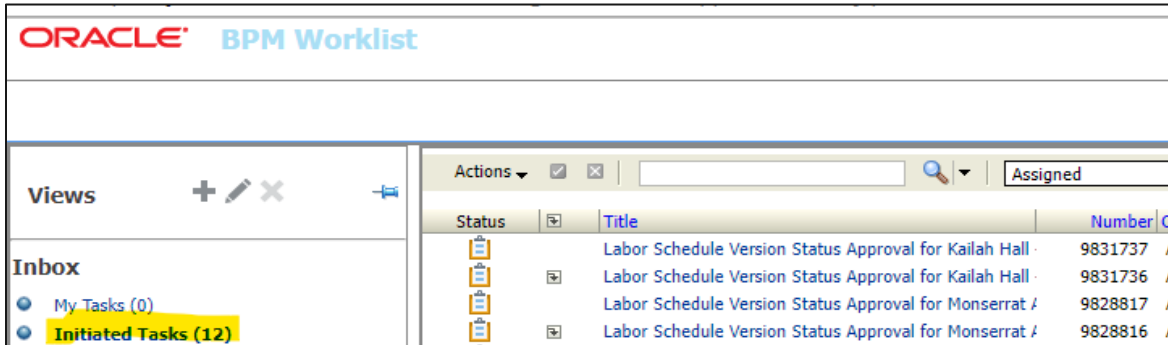
Notifications

Show All

You don't have any pending notifications.

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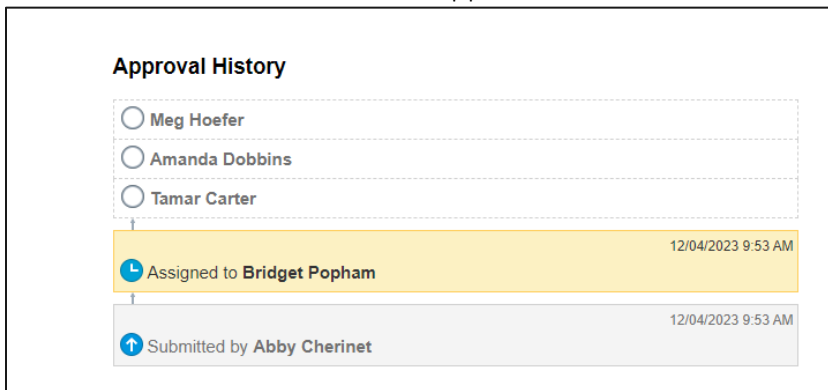
13. Click on “Worklist” located on the upper right-hand corner of the page. A separate window pops up. Click on “Initiated Tasks” to see a list of all Labor schedules entered that are pending approval.



The screenshot shows the Oracle BPM Worklist interface. The header includes the Oracle logo and "BPM Worklist". Below the header, there are navigation options for "Views" and "Inbox". The "Inbox" section shows "My Tasks (0)" and "Initiated Tasks (12)". The main content area displays a table of tasks with columns for "Status", "Title", and "Number".

| 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 A | 9828817 |
| | Labor Schedule Version Status Approval for Monserrat A | 9828816 |

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



The screenshot shows the "Approval History" section. It lists three users: Meg Hoefer, Amanda Dobbins, and Tamar Carter. Below them, there are two entries: "Assigned to Bridget Popham" and "Submitted by Abby Cherinet", both dated 12/04/2023 9:53 AM.

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