

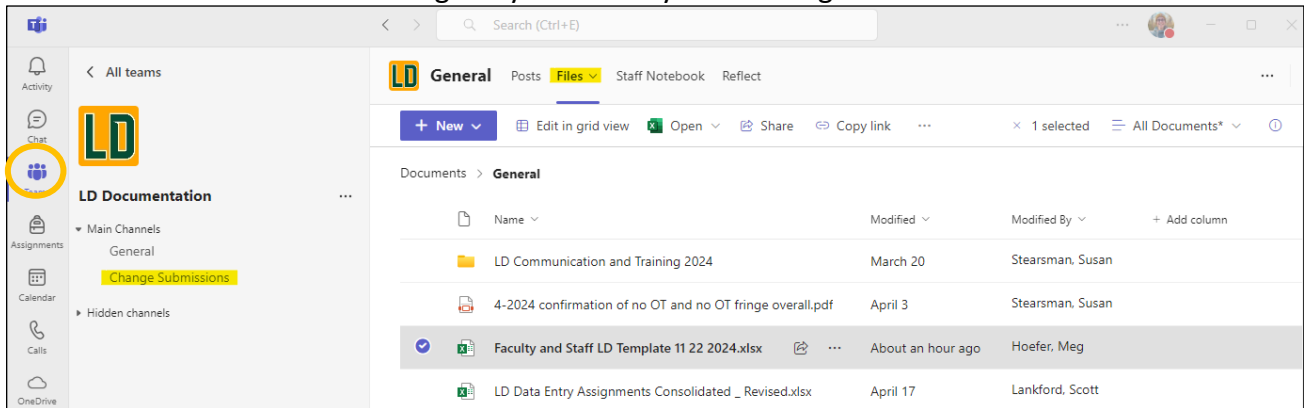


## Labor Distribution: Document Storage Process – QUICK REFERENCE GUIDE –

**Objective:** To support audit compliance, documentation justifying changes to labor schedule versions (and the resulting labor cost adjustments) will be retained within **LD Documentation** in Teams. A link to the supporting documentation retained in Teams should be recorded in the **Comments** field of the corresponding labor schedule version within the *Labor Distribution (LD) Module* in Ignite.

### Instructions:

1. Navigate to **LD Documentation – General channel** in Teams and click on the **Files** tab.
2. Download the current **LD Change Request Form** (i.e., *Faculty and Staff LD Template [Version Date].xlsx*).
  - a. Check for new versions regularly to ensure you are using the most recent.



3. After completing the **LD Change Request Form**, including the applicable signatures, save the file to upload into Teams.

### Labor Distribution Template

 **Superceding LDS**

Employee Name (Last, First Middle)-(Nickname)

Employee Type

Bear ID

Employee ID

Assignment Number

**Change To:**

\* Position Title/Rank

\* Dept Number  Select Department Number

\* Composite FTE

\* Contract Salary

\* Total Salary \$  -

\* Begin Date

\* Admin Stipend  (add all)

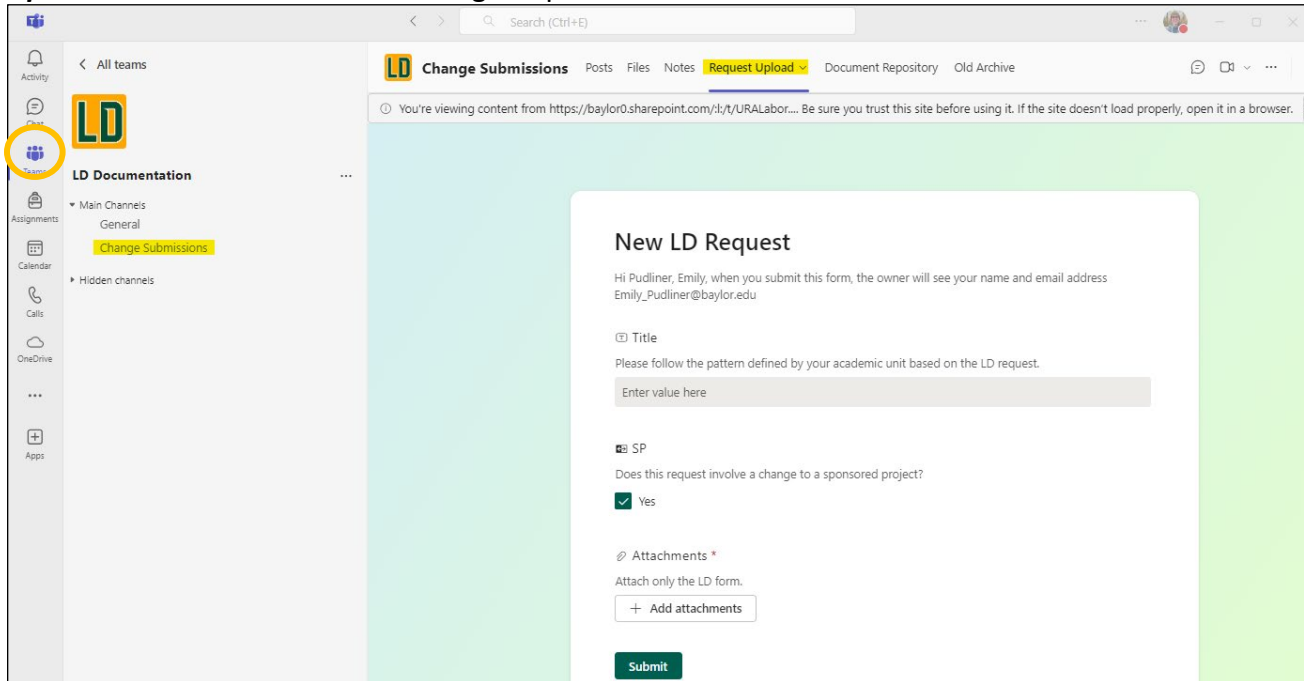
Rate  Monthly Rate

End Date  Duration

Length M - Month(s)

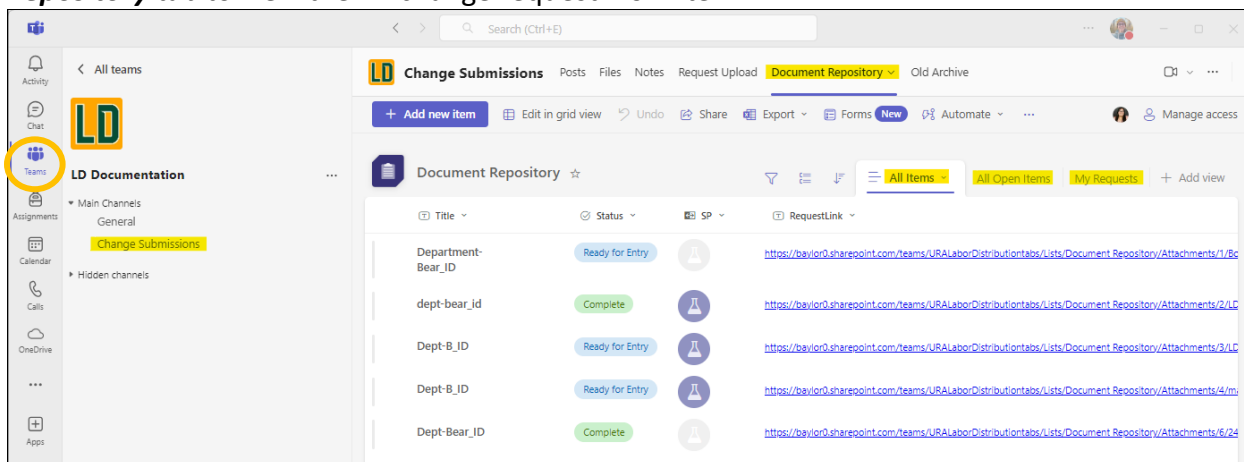
**Further Notice**

- Navigate to the **LD Documentation – Change Submissions** channel in Teams, and click on the **Request Upload** tab to create a new LD change request work item.



- Title:** Enter a *Title* for the LD change request work item in the format defined by your academic business unit.
- SP Checkbox:** Use the checkbox to identify whether the request involves a change to a sponsored project.
- Add Attachments:** Use the *Add Attachments* button to upload the final version of the *LD Change Request Form* completed in Step #3.

- After submitting a new LD change request work item in the Teams channel, navigate to the **Document Repository** tab to view the LD change request work item.

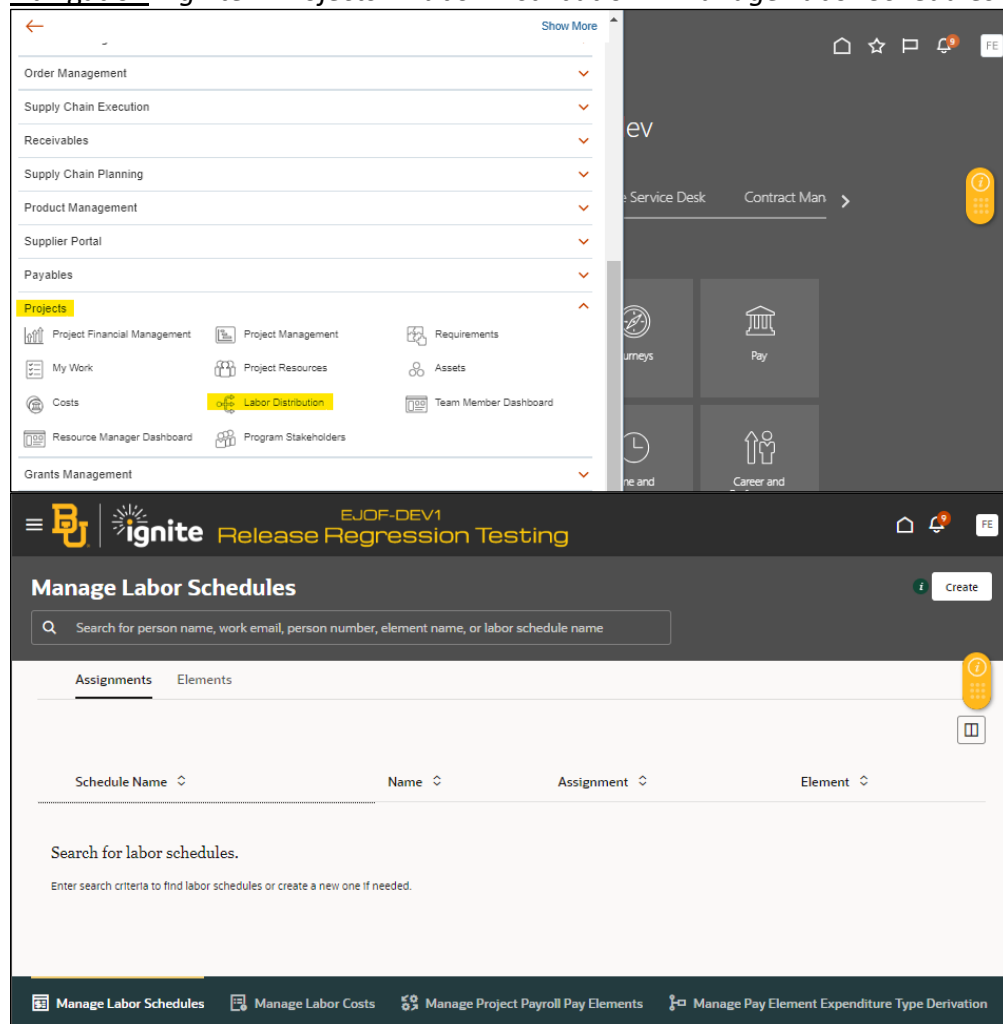




- a. Notice the three subtabs within the primary *Document Repository* tab. These tabs display LD change request work items specific to your user account.
  - i. **All Items** – Displays all of your LD change request work items regardless of *Status* (i.e., both open and completed items).
  - ii. **All Open Items** – Displays all of your open LD change request work items.
  - iii. **My Requests** – Displays all open LD change request work items where you are assigned as the owner.

- 6. Once the LD change request has been recorded in the Teams channel, enter the corresponding labor schedule version within the *LD Module* in Ignite.
  - a. Login to Ignite and navigate to the **Manage Labor Schedules** work area within the *LD Module*.

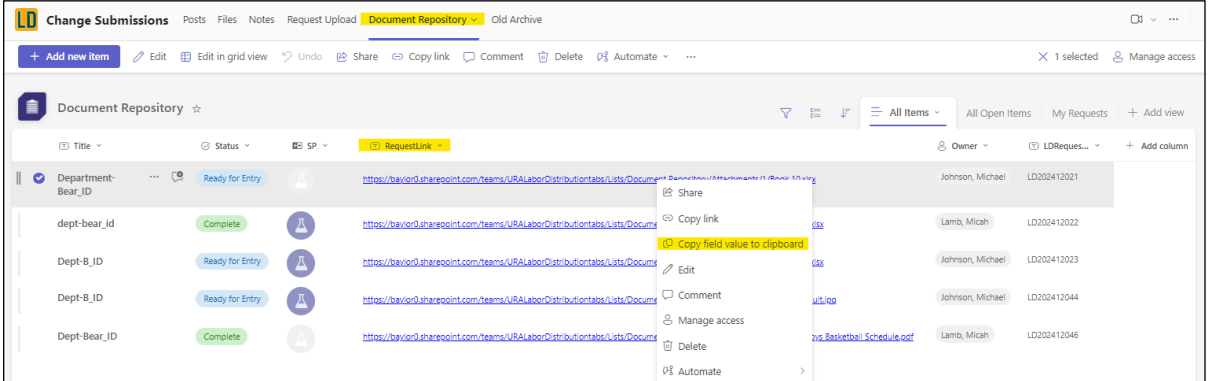
- i. Navigation: *Ignite > Projects > Labor Distribution > Manage Labor Schedules*





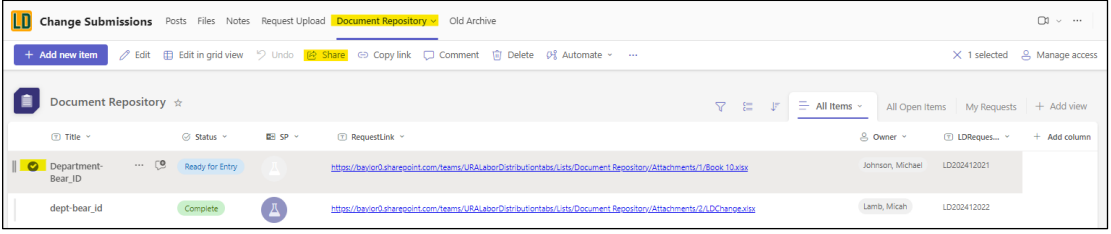


- b. Identify the appropriate LD change request work item and right-click on the corresponding link in the *RequestLink* column. Click **Copy field value to clipboard** to copy the link to the *LD Change Request Form*.

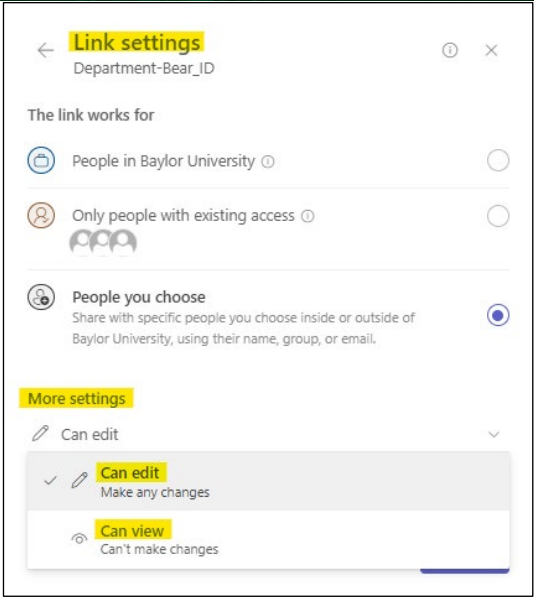
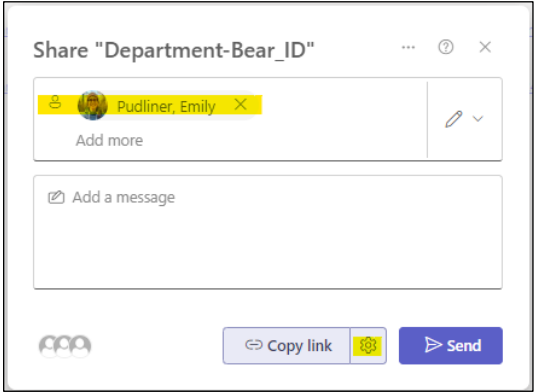


**Note:** It is imperative to click the **Copy field value to clipboard** menu option versus the *Copy link* menu option. The **Copy field value to clipboard** menu option copies the link to the final *LD Change Request Form* while the *Copy link* menu option copies the link to the overall LD change request work item in Teams.

- c. The final *LD Change Request Form* will be available to anyone with access to the link.
  - i. Without making any changes, only members of the *LD Documentation Team* will have access to the link.
  - ii. To provide Principal Investigators with access to link, click on the applicable LD change request work item to highlight the row and click the **Share** icon.

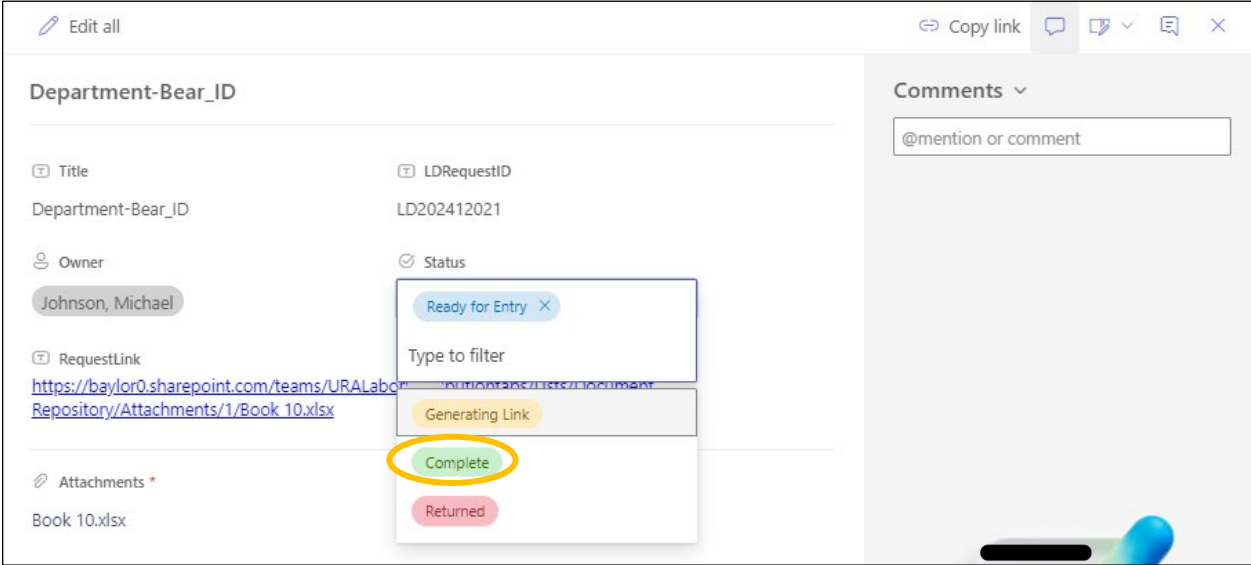


- iii. Within the **Share** pop-up window, enter the Principal Investigator's name and click the **Gear** icon to select the appropriate level of access based on the requirements of your academic business unit (e.g., *Can View* or *Can Edit*). Once complete, click the **Send** button.



**Note:** The Principal Investigator will receive an email stating that access has been granted to the file. The individual will now be able to view the file from the link.

- 8. After the corresponding labor schedule version has been approved via the **LD Workflow** and **activated within the LD Module** in Ignite, **return to Teams** and update the status of the LD change request work item to **Completed**.
  - a. Click on the title of the LD change request work item to open the record. Within the record, update the status to **Complete**.





**ADDITIONAL NOTES:**

- Once the link to supporting documentation is saved in the *Comments* field of the associated labor schedule version within the *LD Module* in Ignite, users can copy-and-paste the link from the *Comments* field to view the supporting documentation.

Schedule Versions: Emily Pudliner - E1000140235 (27)

Start	End	Status	Version Name	Comments	Actions
03/01/2025	03/31/2025	Active	PIPS-7288_TEST_2024-10-14		...
02/01/2025	02/28/2025	Active	PIPS-6095_TEST_2024-09-26		...
11/01/2024	11/30/2024	Submitted	PIPS-7080_TEST_2024-09-09_ChangeRequest	<a href="https://baylor0.sharepoint.com/x/r/teams/PIPS-7080_LaborDistributionDocumentation/Shared%20Documents/General/Labor">https://baylor0.sharepoint.com/x/r/teams/PIPS-7080_LaborDistributionDocumentation/Shared%20Documents/General/Labor</a>	...
11/01/2024	11/30/2024	Inactive	PIPS-7080_TEST_2024-09-09	PIPS-7080_TEST_2024-09-09	...

- In addition, the link to the supporting documentation will be visible in the labor schedule version workflow approval notification, where it can be referenced by approving parties when making the determination on whether to approval or reject a labor schedule version change request.

**Project Labor Schedule Version Approval Notification**

**Labor Schedule Name: Emily Pudliner - E1000140235**

Labor Schedule Version Name: PIPS-7080\_TEST\_2024-09-09\_ChangeRequest

Creation Date: 09/09/2024

Submitted By: 229

Labor Schedule Type: Person assignment

Labor Schedule Type Attributes: Emily Pudliner - PPM Systems Analyst

Total Percentage: 100

Version Start Date: 11/01/2024

Version End Date: 11/30/2024

Version Comments: Reduce E. Pudliner's percent effort on Project #1001522 to 50% for the period of 11/01/2024 to 11/30/2024 to reflect actual time worked.

[https://baylor0.sharepoint.com/x/r/teams/PIPS-7080\\_LaborDistributionDocumentation/Shared%20Documents/General/Labor%20Distribution%20Change%20Requests/102947-1001522/LD-CR\\_102947-1001522\\_PIPS-7080\\_TEST\\_2024-09-09\\_EP.xlsx?d=w6f7c00cccc0c43e0aa45033efedb1ede&csf=1&web=1&e=hxJoaJ](https://baylor0.sharepoint.com/x/r/teams/PIPS-7080_LaborDistributionDocumentation/Shared%20Documents/General/Labor%20Distribution%20Change%20Requests/102947-1001522/LD-CR_102947-1001522_PIPS-7080_TEST_2024-09-09_EP.xlsx?d=w6f7c00cccc0c43e0aa45033efedb1ede&csf=1&web=1&e=hxJoaJ)

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**Distribution Rules Details**

Line Number	Project Name	Task Number	Contract Name	Funding Source Name	Expenditure Type	Expenditure Organization	GI Account Segment	Percentage
1	Lilly Endowment-Young Worshipers-Monteiro	SP	Lilly Endowment-Young Worshipers-Monteiro	Lilly Endowment Inc	Staff-Regular	Music Academic Studies		50
2							110-10706-100-100000-91100-701-0000-00000-00000	50