

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 a new assignment. Refer to the 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.

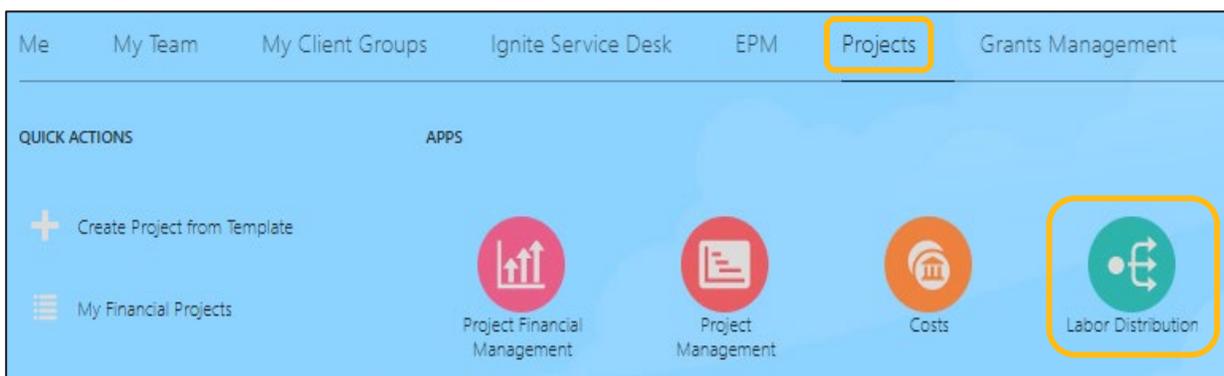
I. Labor Distribution Information

1. Labor Distribution (LD) Accountants will provide a weekly report for all new hires or assignments that require a labor schedule entry. Contact Financial Managers for the costing information.
2. Ensure you have reviewed all active labor schedules and entered the correct effective start and end dates. The Costing End Date is a required field. If an employee has an ongoing assignment and it is known that the 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

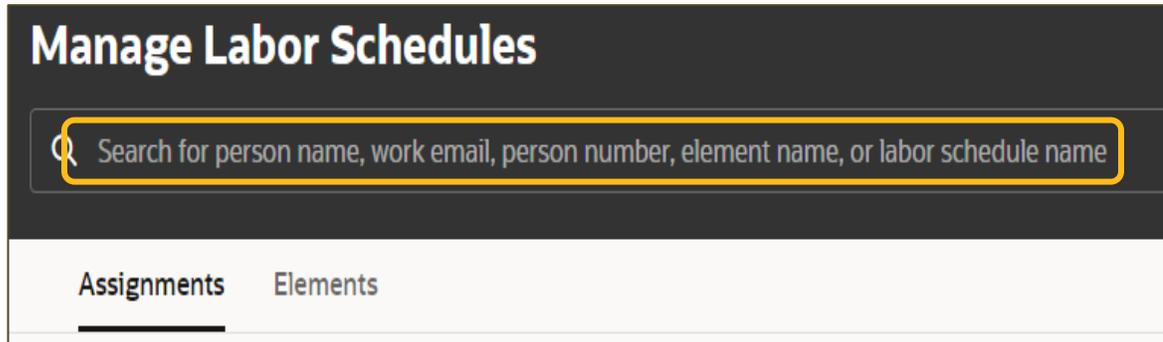
II. Find Employee & Enter a Labor Schedule

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



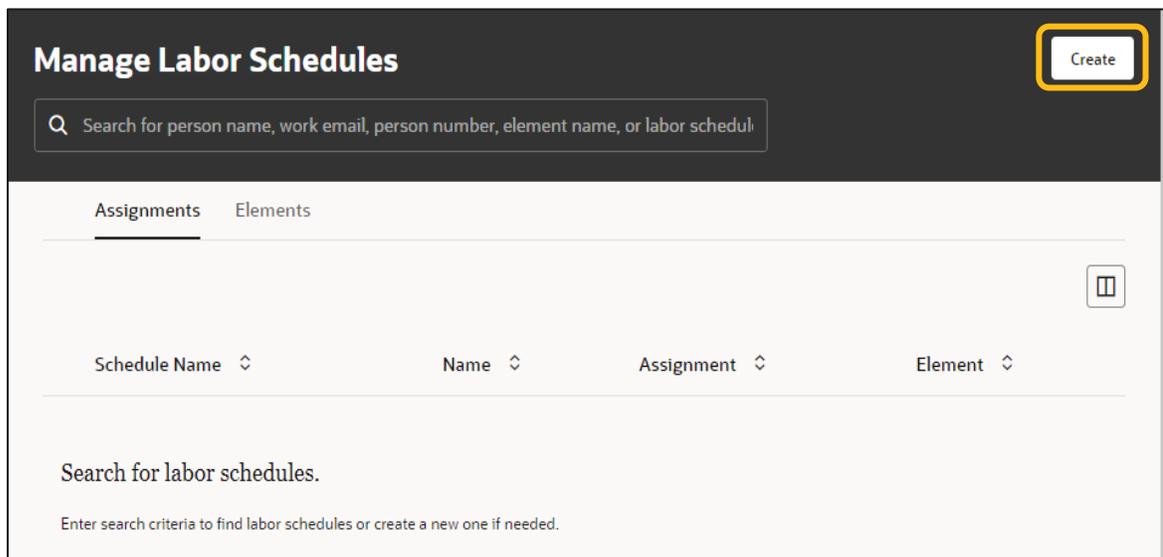
Labor Distribution: Manage Costing on a New Employee or New Assignment

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 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. If the employee or assignment is new, create a new labor schedule by clicking **Create** in the upper right-hand corner. 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 and underlined. Below the tabs, there is a table with four columns: 'Schedule Name', 'Name', 'Assignment', and 'Element'. Each column has a dropdown arrow. Below the table, there is a search bar with the text 'Search for labor schedules.' and a note: 'Enter search criteria to find labor schedules or create a new one if needed.'

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

4. Click on the **Assignment** tab and enter a person's name or number.
 - a. Select the **Person** for the new labor schedule.
 - b. The **Assignment Number** defaults based on the previous selection in step a.
 - c. The Distribute Using Time Cards feature is **NOT** being used and should not be checked.
 - d. The **Schedule Name** defaults to "Name-Assignment #".
 - e. Enter the **Version Name**, refer to the [LD Schedule Version Name QRG](#) for guidance.
 - f. Enter the scheduled **Start Date**.
 - g. Enter the **End Date**.
 - h. 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.

5. Validate the header level schedule version details populated correctly based on the previous steps.
 - a. Additional comments/justification can be added to the version by clicking on the **three dots under Actions** and selecting **Edit**.

Create Labor Schedule

Assignment | Element | Payroll Costing Configuration

Person: Testuser_Baylor_s29

Assignment Number: E128

Distribute Using Time Cards

Costed Only

Pay Element: [dropdown]

Schedule Name: Testuser_Baylor_s29 - E128

Version Name: New Assignment_120123_AC

Start: 01/01/2025

End: 05/31/2025

Cancel | Create

Schedule Versions: Testuser_Baylor_s29 - E128 (1)

Create Version

Start	End	Status	Version Name	Time Card Distribution	Comments	Actions
01/01/2025	05/31/2025	New	New Assignment_120123_AC			...

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

6. Enter a **Distribution Rule**. Click **Create Rule** under the Distribution Rules section.

The screenshot shows a table with columns for Start, End, Status, and Version Name. Below the table, the 'Distribution Rules' section for 'New Assignment_120123_AC' is visible. A 'Create Rule' button is highlighted with a yellow box. Below this, there are dropdown menus for Line, Project, Task, Award, and Funding Source.

- The **Create Distribution Rule** window will open on the right side of the screen.
- Click on the **Project** or **Nonproject** tab depending on the funding source. (*Follow the steps below for Project funding; otherwise, skip to Step 7 for Nonproject funding entry instructions.*)
- Enter the **Project** number. The **Award** and **Funding Source** information will auto-populate.
- Select the **Task** from the drop-down menu.
- Enter the **Expenditure Organization**,
- Enter the **Expenditure Type**
- Enter the **Percentage** allocation.
- Click **Create** to save.

Note: If the percentage allocation entered is less than 100%, click **Create** and enter another distribution rule for the remaining percentage.

The 'Create Distribution Rule' window is shown with the 'Project' tab selected. The form contains the following fields: Project (1001522), Task (SP), Award (102947), Funding Source (Lilly Endowment Inc), Expenditure Organization (Music Academic Studies), Expenditure Type (Graduate Assistant Salaries), and Percentage (75). The 'Create' button is highlighted with a yellow box.

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

7. For **Nonproject** costing, select the **Nonproject** tab.
 - a. Enter the **COA** string
 - b. Enter the **Percentage** allocation.
 - c. Click **Create** to save.

Create Distribution Rule

Project: **Nonproject**

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

Percentage: 25

Buttons: Cancel, **Create**

8. Review the **Distribution Rules** created. The total percentage allocation between various funding sources must **total 100%**.

Distribution Rules: New Assignment_120123_AC (2)

Line	Project	Task	Award	Funding Source	Expenditure Organization	Expenditure Type	GL Account	Percentage	Actions
1	1001522	SP	102947	Lilly Endowment Inc	Music Academic Studies	Graduate Assistant Salaries		75.00%	...
2							320-32375-100-1000000-92150-101-0000-00000	25.00%	...
Total								100.00%	

9. Submit the schedule version for approval.
 - a. Under the **Schedule Version** header, click the labor schedule version (this will highlight the line).
 - b. Under the **Actions** column on the far right, click on the **3 dots**.
 - c. Select **Edit**.

Schedule Versions: Testuser_Baylor_s29 - E128 (1)

Start	End	Status	Version Name	Time Card Distribution	Comments	Actions
01/01/2025	05/31/2025	New	New Assignment_120123_AC			...

Distribution Rules: New Assignment_120123_AC (2)

Buttons: Create Rule

Dropdown Menu: Edit, Duplicate Version, Delete

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

- d. Verify the **Version Name, Start, and End** dates.
- e. Use the dropdown menu to change the **Status** to **Active**.
- f. Click **Save**.

The screenshot shows a form for configuring a Labor Schedule Version. The fields are as follows:

- Version Name:** New Assignment_120123_AC
- Start:** 01/01/2025
- End:** 05/31/2025
- Status:** Active (highlighted with a yellow box)
- Distribute Using Time Cards
- Comments:** New Assignment_120123_AC

At the bottom right, there are **Cancel** and **Save** buttons, with the **Save** button highlighted in yellow.

Note: The Labor Schedule Version status will be updated to **“Submitted”**.

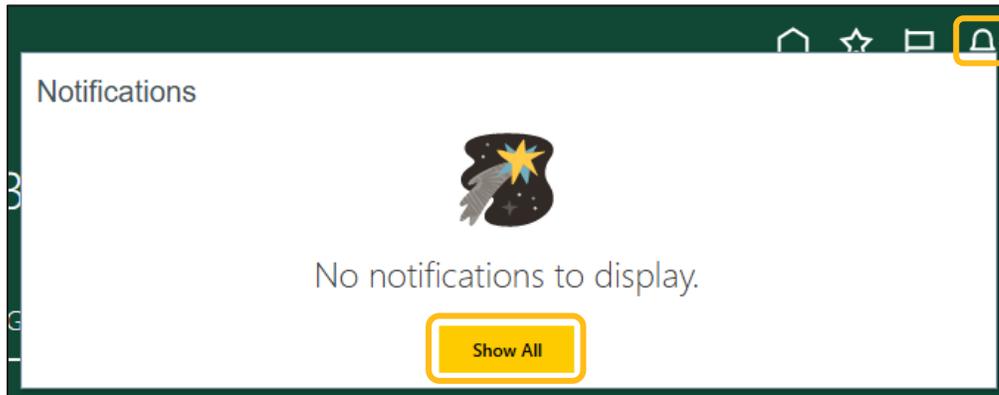
Schedule Versions: Testuser_Baylor_s29 - E128 (1)

Create Version ☰

Start	End	Status	Version Name	Time Card Distribution	Comments	Actions
01/01/2025	05/31/2025	Submitted	New Assignment_120123_AC		New Assignment_12	⋮

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

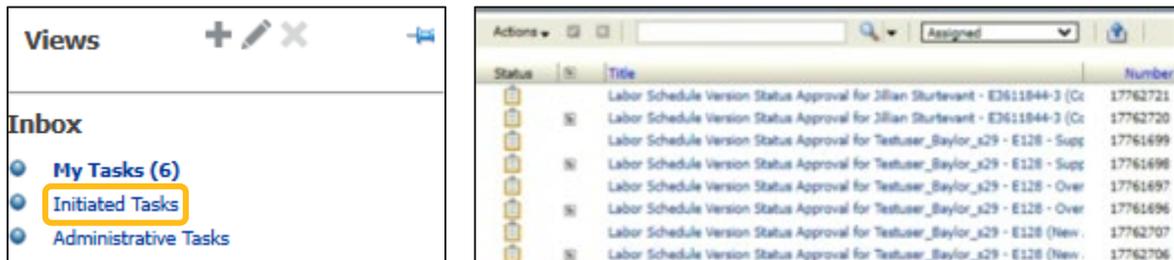
10. To track the approval status of a submitted schedule within the workflow, go to the **Notification Bell** and click **Show All**.



11. Click on **Worklist** in the upper right-hand corner.



12. A separate window opens; click on **Initiated Tasks** to see a list of all Labor schedules entered that are pending approval.



13. Click on the schedule to view the **Approval status**.

