

Effort Reporting

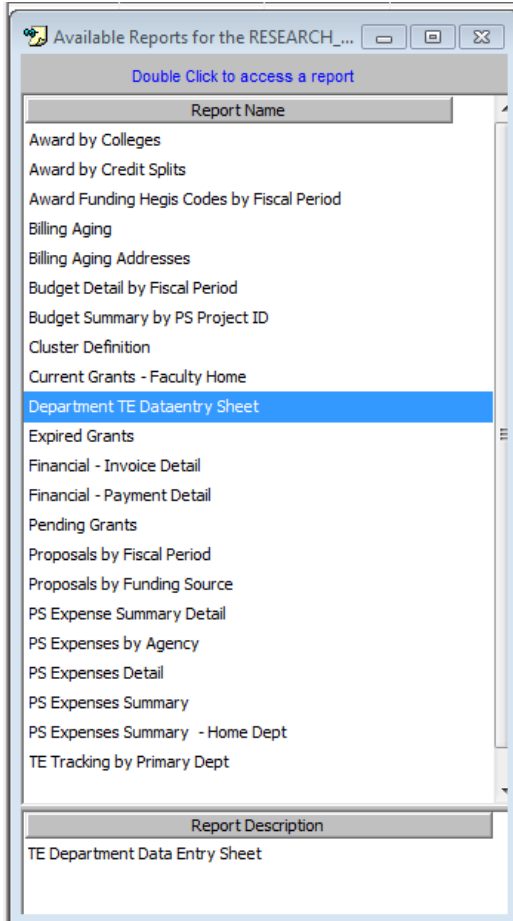
OCG enters all effort into RD2K. You only need to print the reports, verify the effort is correct, and route for signatures.

RD2K Procedures

1. Navigate to the Reports section in RD2K



2. Choose Department TE Dataentry Sheet



3. Enter your department, the fiscal year you are working on, and the fiscal quarter

A screenshot of the search criteria form. It has two tabs: 'Search Criteria' and 'Report Results'. The 'Search Criteria' tab is active. Below the tabs is a table with columns for Department, Fiscal Year, Fiscal Quarter, Hr Cd, Pi Name, and Row Indicator. The Department column has a dropdown arrow, and the Row Indicator column has a dropdown arrow.

Department	Fiscal Year	Fiscal Quarter	Hr Cd	Pi Name	Row Indicator

4. The reports will come up in a long continuous set in RD2k. Print the reports to PDF and save in the Effort Reporting FY 20XX>Quarter X> Blank Effort Sheets folder on the P drive. Print a physical copy of the reports.

FMP Procedures

1. From the Main Menu go to HR/Payroll Time & Effort
2. Run an Employee Roster for the specified time period. PDF print and save in the Effort Reporting FY 20XX>Quarter X>Reports folder on the P drive with name Employee.Roster.MMDDYY

The screenshot shows a web-based form for selecting a report. At the top, there is a search icon and the word "Find". Below this, the "REPORT" field is set to "Employee Roster". The form includes several input fields: "DEPARTMENT", "NAME" (with a note: "(only use for Individual Search, otherwise it will be ignored)"), "EMPLOYEE ID", "EMPLOYEE TYPE" (note: "(only for EMPLOYEE ROSTER)"), "CURRENT TITLE" (note: "(only for EMPLOYEE ROSTER)"), "SPEEDTYPE" (note: "(only for EMPLOYEE ROSTER)"), "SUBACCOUNT" (note: "(only for EMPLOYEE ROSTER)"), and "SUPERVISOR" (note: "(only for EMPLOYEE ROSTER)"). There are also "DATE" and "To" fields with calendar icons, and a "PAY TYPE" field. A checkbox for "LONGEVITY" is present with the note "(only valid for Bi-Weekly Trial/Final Reports)". Below these fields is a "University Leave" section with sub-sections for "ADMINISTRATIVE LEAVE @ 100% FTE" and "EMERGENCY LEAVE @ 100% FTE" (note: "(only valid for Monthly Trial Reports)"). A "Find" button is at the bottom.

3. Run Quarterly Effort Detail by Employee | ALL for the specified time period. PDF print and save in the Effort Reporting FY 20XX>Quarter X>Reports folder on the P drive with name Quarterly.Effort.by.Employee.All.MMDDYY

The screenshot shows a web-based form for selecting a report. At the top, there is a search icon and the word "Find". Below this, the "REPORT" field is set to "Quarterly Effort Detail by Employee | ALL". The form includes several input fields: "DEPARTMENT", "NAME" (with a note: "(only use for Individual Search, otherwise it will be ignored)"), "EMPLOYEE ID", "EMPLOYEE TYPE" (note: "(only for EMPLOYEE ROSTER)"), "CURRENT TITLE" (note: "(only for EMPLOYEE ROSTER)"), "SPEEDTYPE" (note: "(only for EMPLOYEE ROSTER)"), "SUBACCOUNT" (note: "(only for EMPLOYEE ROSTER)"), and "SUPERVISOR" (note: "(only for EMPLOYEE ROSTER)"). There are also "DATE" and "To" fields with calendar icons, and a "PAY TYPE" field. A checkbox for "LONGEVITY" is present with the note "(only valid for Bi-Weekly Trial/Final Reports)". Below these fields is a "University Leave" section with sub-sections for "ADMINISTRATIVE LEAVE @ 100% FTE" and "EMERGENCY LEAVE @ 100% FTE" (note: "(only valid for Monthly Trial Reports)"). A "Find" button is at the bottom.

4. Run Quarterly Effort Summary by Project for the specified time period. PDF print and save in the Effort Reporting FY 20XX>Quarter X>Reports folder on the P drive with name Quarterly.Effort.by.Project.MMDDYY

Find

REPORT **Quarterly Effort Summary by Project**

DEPARTMENT

NAME (only use for Individual Search, otherwise it will be ignored)

EMPLOYEE ID

EMPLOYEE TYPE (only for EMPLOYEE ROSTER)

CURRENT TITLE (only for EMPLOYEE ROSTER)

SPEEDTYPE (only for EMPLOYEE ROSTER)

SUBACCOUNT (only for EMPLOYEE ROSTER)

SUPERVISOR (only for EMPLOYEE ROSTER)

DATE To

PAY TYPE

LONGEVITY (only valid for Bi-Weekly Trial/Final Reports)

University Leave

ADMINISTRATIVE LEAVE @ 100% FTE

EMERGENCY LEAVE @ 100% FTE

(only valid for Monthly Trial Reports)

Find

Review Procedures

- Go to the P drive>Minutes and Procedures>Effort Reporting folder and open the Master.List.TEMPLATE.041612 spreadsheet. Save a copy in Effort Reporting FY 20XX>Quarter X>Reports with name Master.List.Quarter.X.FYXXXX.MMDDYY.
- Enter the Fiscal Year, Quarter, and Time Period that is being reviewed.

FY:					
Quarter:					
Time Period:					

- Enter the names of all employees who had effort sheets print from RD2K on the Master List tab.

Employee Name	<i>Effort correct to FMP</i>	<i>Effort Correct to PS</i>	<i>Report signed by Empl</i>	<i>Report signed by all Pt's</i>	<i>Reported % entered in RD2K</i>	<i>Report filed in house</i>	<i>Report uploaded to RD2K</i>
A							
B							
C							

Cal Template Master List Empl 1

- Review the printed RD2K reports to the Quarterly Effort Detail by Employee report. If the RD2K report effort entered by OCG does not match the FMP report enter the information from the Employee Roster on the Cal Template tab of the Master List. This will give the true % effort for the time period.


Calculation for Weight of each cost center by duration, FTE, and distribution						
Employee:	A					
Quarter:	0					
Fiscal Year:	0					
Time Period	0					
Project ID	Speed	# months	FTE*	Distribution %	Effort Months	% Effort
				100	0	#DIV/0!
				100	0	#DIV/0!
				100	0	#DIV/0!
				100	0	#DIV/0!
				100	0	#DIV/0!
				100	0	#DIV/0!
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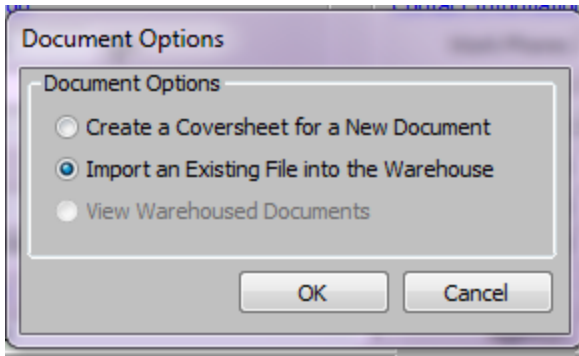
5. Write the correct percentage on the RD2K Effort sheet
6. Put an x in the Effort correct to FMP cell on the Master List tab
7. Put an x in the Effort correct to PS cell on the Master List tab
8. For all PIs, put PI Only in the Report signed by all PI's cell on the Master List tab
9. Route RD2K effort reports for signatures.
10. When signed reports are returned scan and save to Effort Reporting FY 20XX>Quarter X>Signed Effort Sheets with name YYYY.Quarter.X.Effort.Report.LastName.
11. Put an x in the Report signed by Empl cell on the Master List tab
12. Put an x in the Report signed by all PI's cell on the Master List tab
13. Put an x in the Reported % entered in RD2K cell on the Master List tab
14. Put an x in the Report efiled in house cell on the Master List tab
15. Navigate to RD2K HR Panel



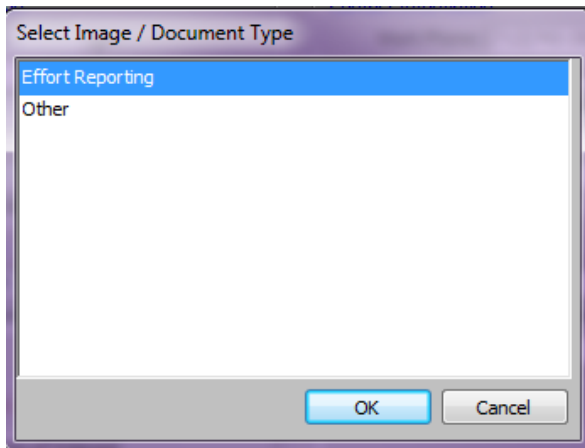
16. Enter the EmplID or First Name and Last Name

Hr Code	EmplID	First Name	Last Name	Department

17. Click the  icon next to the HR Code. If no items have been uploaded the icon will be white. If items have been previously uploaded it will be yellow.
18. Choose Import an Existing File in the Warehouse and click OK



19. Choose Effort Reporting and click OK

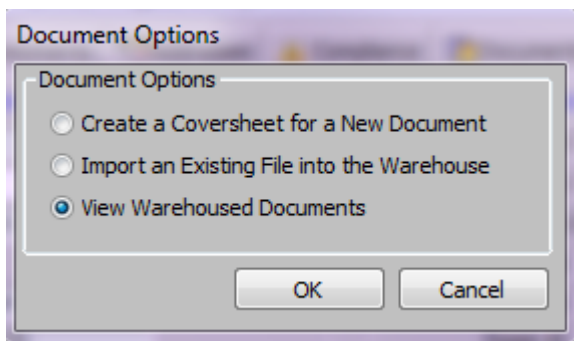


20. Change the description to YYYY Quarter X Effort Reporting and click OK.

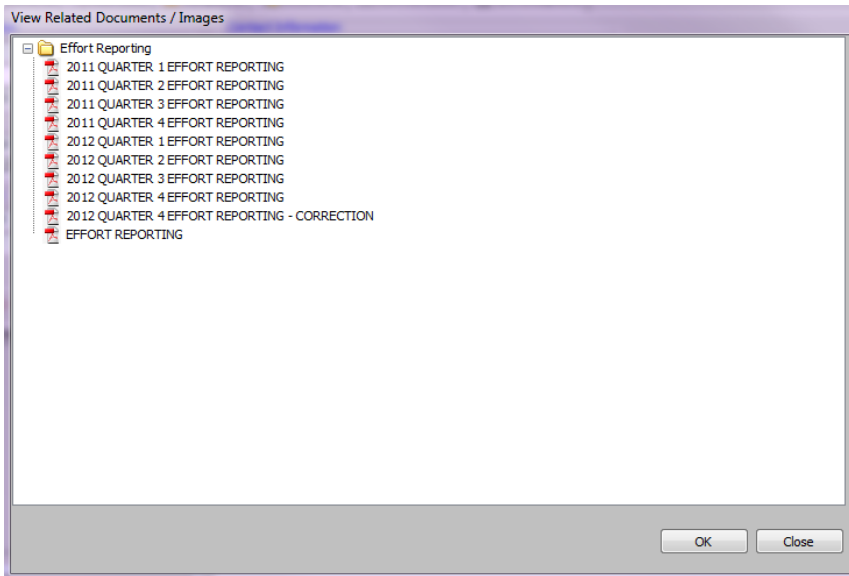
21. Choose the folder on the P drive where the signed effort sheets are saved and find the corresponding report.

22. You will get a message saying the report has been successfully consumed in the warehouse. You are done.

23. You can view the items that have been previously uploaded. Choose View Warehoused Documents and click enter.



24. You will see a list of the previously uploaded reports.



25. After the report has been uploaded put an x in the Report uploaded to RD2K cell on the Master List tab