Effort Reporting Dashboard

Effort Reporting Dashboard Page

The **Effort Reporting** dashboard page is located on the Finance dashboard, under the Grants group. Use this dashboard to view the supporting payroll amounts included on the Effort Reports that are distributed by the Grants Accounting office for certification each academic term.   The dashboard will display the dollar amounts and percentages of total effort for each employee included on the reports.

Note: Only users who have access to the HR dashboard will see this dashboard tab. If you do not have access to this dashboard and you are responsible for certifying the Ohio University Effort Reports, please contact your planning unit's business office to request a copy of the report.

Dashboard Prompts

Multiple prompt options are available on this dashboard. **Calendar Year** and **Effort Period** are required prompts. Other prompts may be used to view specific orgs, employees, etc.

Prompt Definitions

Term	Definition
* Calendar Year	* (Asterisk) indicates this is a required field. Select the calendar year in which the term begins. For example, for Fall 2018-2019, choose 2018 since the term begins in Aug. 2018; for Spring 2018-2019, choose 2019 since the term begins in Jan. 2019.
*Effort Period	* (Asterisk) indicates this is a required field. Select Fall, Spring, or Summer.
HR Planning Unit/ HR Org with Name	The planning unit/org on an employee's HR assignment record. If an employee has multiple HR assignments, only the wages for the assignment in the selected planning unit/org will be displayed. If you do not see the expected results for an employee in your org, please prompt by only employee (name or number) and view the results prior to contacting the Grants Accounting office.
Employee Number/ Last Name/First Name	If you would like to search for a specific employee, enter the employee's six digit employee number or their last name/first name.
Entity/Source/GL Org/Activity/Function/ Object	These prompts allow you to specify GL segments where the employee(s) wages are charged. Using these prompts will only display the portion of the wages charged to the GL account entered.
Project/Task/Award	These prompts allow you to specify portions of a PTA to see employee(s) costed to specific grant accounts. Using these prompts will only display the portion of the wages charged to the PTA entered.

Criteria

What employees are included in the dashboard?

- The report contains payroll detail for all salaried employees with any charges to a federal grant account. The report includes all charges for these employees. If the employee has a second assignment that is an hourly assignment, the hourly assignment details are also included in the effort percentage calculations.

What pay elements are included in the dashboard?

- The report includes only the institutional base pay elements that are included in the Ohio University Effort Reports. A list of these elements can be found on the Effort Reporting Element List in OBI in the Human Resources catalog > General HR Reports > Payroll folder.

Dashboard Columns

Default Columns

To condense the report, only the following columns are automatically displayed on the OBI screen:

- Full Name, Employee Number, Awd Short Name, Cost Center/PTA, Current Net, and Current Net %

The **Current Net** column will return a dollar amount rounded to two decimal places. It reflects the wages after any payroll distribution adjustments.

The **Current Net %** column will return a percentage rounded to two decimal places. This calculated column compares current net against the total wages for the prompts selected. Due to the rounding involved in this calculation, you may encounter a slight variance with this value compared against your Ohio University Effort Report. If the variance is greater than .01%, re-run your analysis using only the employee prompts (number or name).

Additional Columns

The following additional columns will be included if you export the data to a CSV file:

- Fiscal Year, Object, Project, Task, Award, Entity, Source, Activity, Function, Organization, Transaction Date, Check Date, Original Net, Transfer Net, Element Full Name, HR Planning Unit, HR Organization with Name, and Assign Pay Basis

If you would like to include any of these additional columns on your screen, you must do so to the left of the Current Net Amount column. Inserting columns in between or after the Current Net columns will change the layout of the entire report, as these are calculated columns.

You may see rows with a zero dollar amount and zero percentage. These rows are a result of Payroll Accounting Corrections. If you would like to see additional detail for those corrections, you can include the **Transaction Date** column to view the transfer date.