



Dashboard: Effort Analysis Report

What is the Effort Analysis Report?

The Effort Analysis Report provides the percentage of committed effort, the percentage of charged effort, the percentage of certified effort, and a variance of the certified vs. committed effort. The report can be run by Operating Unit, Department, Award Project, individual employee, or Assigned Pre-Reviewer.

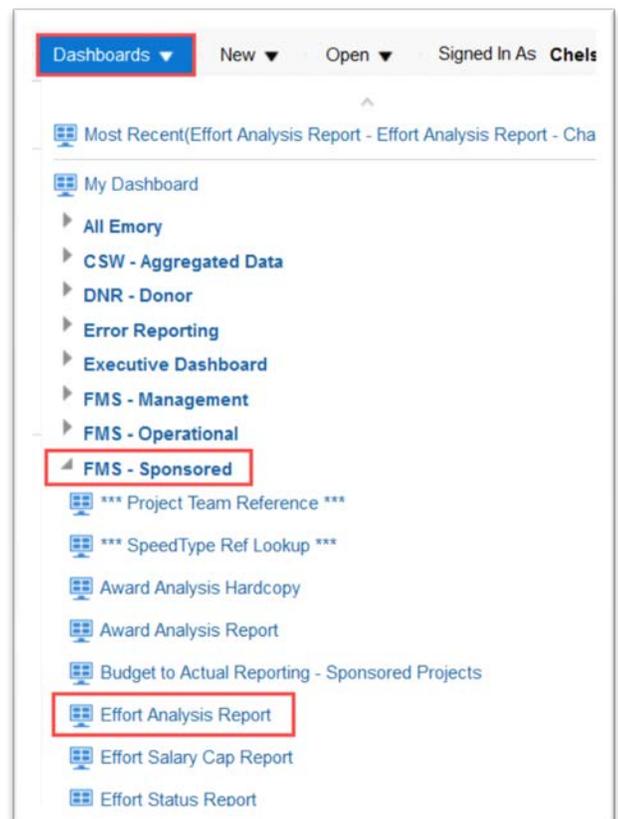
IMPORTANT NOTE: This report involves employee payroll data and requires Labor Security. The same Labor Security you have on the Labor Transaction Detail Report applies to the Effort Analysis Report. Therefore, only authorized charged or managed employee detail will appear based on your security configuration. Labor Security Access is not granted by EBI. See the [How do I Submit a Request for Labor Data Access?](#) job aid for additional information.

When should I use the Effort Analysis Report?

Use this report if you are looking for details related to employee effort. This is for reporting purposes only, employees are still required to certify effort via the [Effort Reporting System](#) based on applicable federal guidelines.

Where do I find this report in EBI?

1. Log in to EBI: <https://dwbi.emory.edu/analytics>
2. Click on the Dashboards Menu in the upper right corner
3. In the FMS – Sponsored folder, click the Effort Analysis Report link.



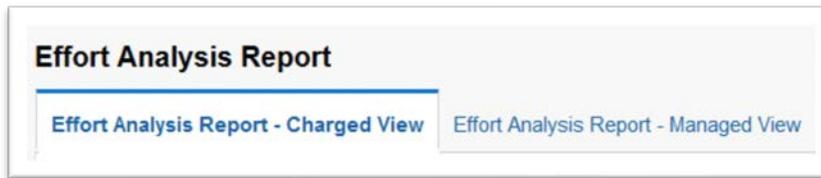


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Understanding the Dashboard Pages

The dashboard is divided into two pages (or tabs).

1. **Effort Analysis Report – Charged View** is the default page for the dashboard and displays effort details based on the prompted values in a table format. Security is based on the Operating Unit, Department, or Project where the transaction was charged.
2. **Effort Analysis Report – Managed View** also displays effort details based on the prompted values in a table format, but this security is based on access to the employee’s HR department.



Please note that the Effort Analysis Report may run more slowly than other reports in EBI. This is due to the Labor Security Access roles assigned to each individual user.

Understanding the Date Range Prompts

You are not required to enter dates in the Report Begin Date or Report End date prompts to run either of the report pages. The reports will run based on your Chartfield or employee prompt selections and will default to display complete effort reporting periods within 12 months trailing from the current date.

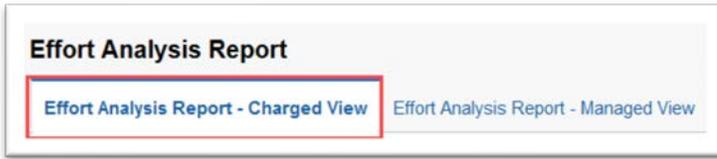
You can override the default time range by entering a Report Begin Date AND Report End Date.

TIP: Reporting begin and end dates will return effort based on reporting periods whose begin and end dates fall within the date range selected.



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Effort Analysis Report – Charged View page



Selecting Prompts:

1. Enter a date range if you need to override the default.
2. Select an Employee as needed, or choose All Column Values and select values for Assigned Pre-Reviewer, Charged Operating Unit, Charged Department, Charged Award, or Charged Project as necessary.
3. Click Apply.

TIP: Remember, a required prompt is indicated by an *. The only required prompt on this page is the Employee prompt. '(All Column Values)' is a valid prompt selection even for required prompts.

Default Page Layout

After the report has run and data is displayed, the default view for the report shows Employee, Department, and Project information, along with the following:

- The Committed Effort Percentage
- The Charged and Certified Amounts and Percentages
- The Cost Share Amount and Percentage
- The Effort Variance between the Committed and the Certified Percentage

The results also include subtotals by the Reporting Period End Date.

Emory University Effort Analysis Report
 Date Range: Default - 12 month period ending 04/21/2020, User Entered - @[BEGINDATE] - @[ENDDATE]
 Date run: 4/21/2020

Employee ID	Employee Name	HR Department	HR Department Description	Reporting Period Begin Date	Reporting Period End Date	Charged Department	Charged Department Description	Charged Project	Charged Project Description	Sponsored Project	Committed Effort (%)	Original Payroll Amount (\$)	Payroll Percentage (%)	Pre-Review Cost Share Amount (\$)	Pre-Review Cost Share Percentage (%)	Certified Amount (\$)	Certified Percentage	Effort Variance (%)
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TIP: This report has several Excluded Columns that can be added to the results and saved as a customization. Right click on any column header and navigate to Include Column to see the available columns. Possible columns include, but are not limited to: Pre-Reviewed Status, Certified Status, Cost Transfer Amount and Percentage, Project Activity.



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Effort Analysis Report – Managed View page

Effort Analysis Report

Effort Analysis Report - Charged View **Effort Analysis Report - Managed View**

Selecting Prompts:

1. Enter a date range if you need to override the default.
2. Select an Employee as needed, or choose All Column Values and select values for Assigned Pre-Reviewer or HR Department as needed.
3. Click Apply.

TIP: Remember, a required prompt is indicated by an *. The only required prompt on this page is the Employee prompt. '(All Column Values)' is a valid prompt selection even for required prompts.

Default Page Layout

The default layout is the same as the Charged View page and shows Employee, Department, and Project information, along with the following:

- The Committed Effort Percentage
- The Charged and Certified Amounts and Percentages
- The Cost Share Amount and Percentage, if applicable
- The Effort Variance between the Committed and the Certified Percentage

The results also include subtotals by the Reporting Period End Date.

Employee ID	Employee Name	HR Department	HR Department Description	Reporting Period Begin Date	Reporting Period End Date	Charged Department	Charged Department Description	Charged Project	Charged Project Description	Sponsored Project	Committed Effort (%)	Original Payroll Amount (\$)	Payroll Percentage (%)	Pre-Review Cost Share Amount (\$)	Pre-Review Cost Share Percentage (%)	Certified Amount (\$)	Certified Percentage (%)	Effort Variance (%)
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TIP: This report has several Excluded Columns that can be added to the results and saved as a customization. Right click on any column header and navigate to Include Column to see the available columns. Possible columns include, but are not limited to: Pre-Reviewed Status, Certified Status, Cost Transfer Amount and Percentage, Project Activity.



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More Information:

For assistance with Labor Security Access, contact the Cost Studies team via the [Finance Support Center](#). Choose **Cost Studies - Labor** as your ticket category.

For questions about or issues with the Effort Analysis Report, please contact the Analytics & Reporting team via the [Finance Support Center](#). Choose **Emory Business Intelligence (EBI)/Reporting** as your ticket category.