Dashboard: Effort Status Report

What is the Effort Status Report?

The Effort Status Report provides the ability to view the status (pending, pre-reviewed, certified) of effort certifications by Operating Unit, Department, Award, Project, or Assigned Pre-Reviewer.

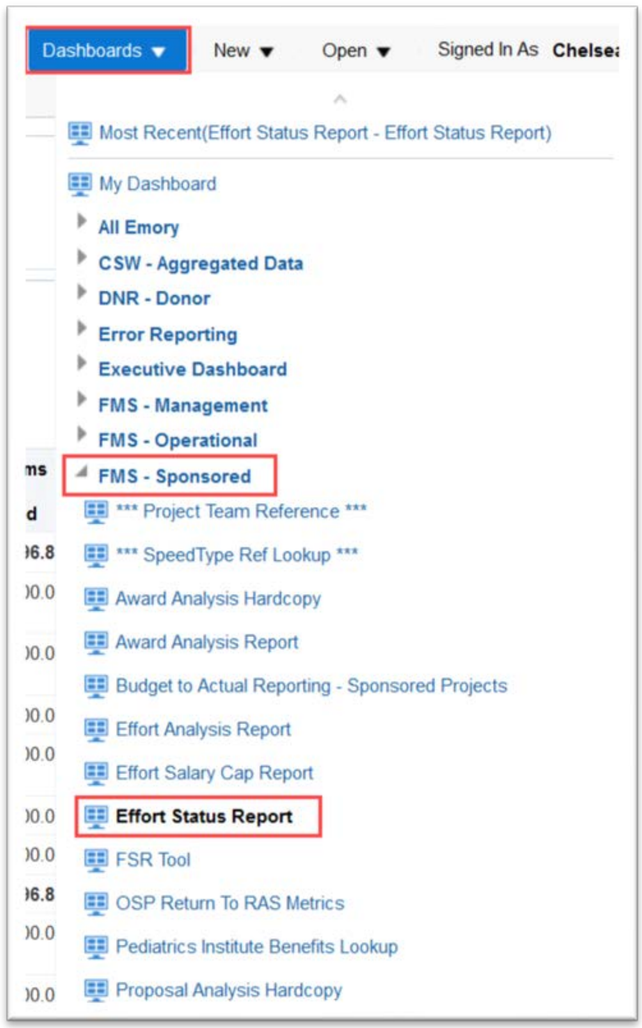
IMPORTANT NOTE: All effort pages that contain employee payroll data require Labor Security. The same Labor Security you have on the Labor Transaction Detail Report applies to the Effort Status Report. Therefore, only authorized charged or managed employee detail will appear based on your security configuration. 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 Status Report?

Use this report if you are looking for status details related to employee effort certification. 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 Status Report link.



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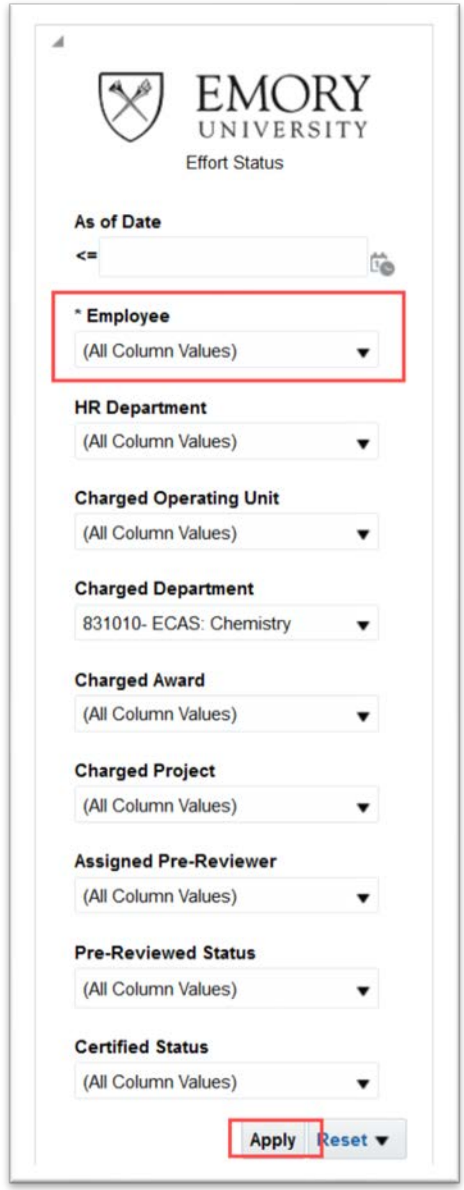
Selecting Prompts



1. Enter an “As of Date” if you need to override the default.

   NOTE: If left blank, the “As of Date” will default to today’s date.

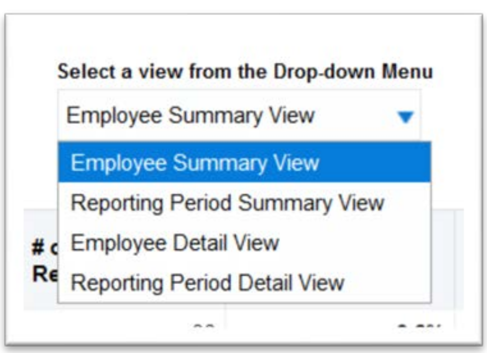
2. Select an Employee as needed, or choose All Column Values and select values for HR Department, Charged Operating Unit, Charged Department, Charged Award, Charged Project or other prompts as necessary.

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.

Available Views for the Report

After you have applied your prompts and results have populated on the report, you will see a view selector drop down menu near the middle of the page. There are four views available for the Effort Status Report.



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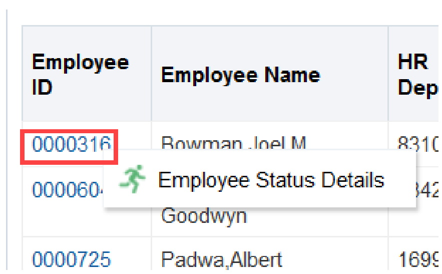
1. The **Employee Summary View** is the default view for the report. This view shows the number and percentage of Pre-Reviewed, Certified, and Pending forms, sorted by the Employee and HR Department.

Emory University Effort Status Report
As of Date: Default - 04/24/2020, User Entered - @{ENDDATE}
Date run: 4/24/2020

Select a view from the Drop-down Menu
Employee Summary View

Employee ID	Employee Name	HR Department Id	HR Department Desc	# of Forms Pending Pre-Review	# of Forms Pre-Reviewed	% of Forms Pending Pre-Review	% of Forms Pre-Reviewed	# of Forms Pending Certification	# of Forms Certified	% of Forms Pending Certification	% of Forms Certified
0000316	Bowman,Joel M	831010	ECAS: Chemistry	1	30	3.2%	96.8%	1	30	3.2%	96.8%
0000604	Mitchell,Deborah Goodwyn	834250	ECAS: Emory Inst for Drug Disc	0	4	0.0%	100.0%	0	4	0.0%	100.0%
0000725	Padwa,Albert	169902	HR: Retiree (HR Use Only)	0	1	0.0%	100.0%	0	1	0.0%	100.0%
0000725	Padwa,Albert	831010	ECAS: Chemistry	0	19	0.0%	100.0%	0	19	0.0%	100.0%
0000767	Liebeskind,Lanny S	830060	ECAS: Dean of the College	0	17	0.0%	100.0%	0	17	0.0%	100.0%
0001322	Liotta,Dennis C	831010	ECAS: Chemistry	0	31	0.0%	100.0%	0	31	0.0%	100.0%
0001414	Austin,Harland D	814000	SPH: Epidemiology	0	10	0.0%	100.0%	0	10	0.0%	100.0%
0001523	Heaven,Michael C	831010	ECAS: Chemistry	1	30	3.2%	96.8%	1	30	3.2%	96.8%
0001985	Shoji,Mamoru	732500	SOM: HMO: Med Onc	0	15	0.0%	100.0%	0	15	0.0%	100.0%
0001996	Marsteller,Patricia	830050	ECAS: Ofc Research Fund Supprt	0	5	0.0%	100.0%	0	5	0.0%	100.0%
0001996	Marsteller,Patricia	831000	ECAS: Biology	0	4	0.0%	100.0%	0	4	0.0%	100.0%

The option to drill to additional details is available on the Employee ID. This drill will display **"Employee Status Details"** showing only those forms for that individual.



Employee ID	Employee Name	HR Department Id	HR Department Desc	Reporting Period Begin Date	Reporting Period End Date	Assigned Pre-Reviewer Name	# of Forms Pending Pre-Review	# of Forms Pre-Reviewed	Pre-Reviewed Date	Pre Reviewer Name	Assigned Certifier Name	# of Forms Pending Certification	# of Forms Certified	Certified Date	Certifier Name
0000316	Bowman,Joel M	831010	ECAS: Chemistry	9/1/2019	2/29/2020	Snyder,Deborah	1	0		-	Bowman,Joel M	1	0		-
0000316	Bowman,Joel M	831010	ECAS: Chemistry	3/1/2019	8/31/2019	Snyder,Deborah	0	1	11/25/2019	Grandberry,Nikya	Bowman,Joel M	0	1	12/16/2019	Bowman,Joel M
0000316	Bowman,Joel M	831010	ECAS: Chemistry	9/1/2018	2/28/2019	Snyder,Deborah	0	1	3/26/2019	Randle,Kimberly A	Bowman,Joel M	0	1	3/27/2019	Bowman,Joel M
0000316	Bowman,Joel M	831010	ECAS: Chemistry	3/1/2018	8/31/2018	Snyder,Deborah	0	1	10/17/2018	Roberts,Venrique Hosea	Bowman,Joel M	0	1	10/24/2018	Bowman,Joel M
0000316	Bowman,Joel M	831010	ECAS: Chemistry	9/1/2017	2/28/2018	Snyder,Deborah	0	1	4/30/2018	Roberts,Venrique Hosea	Bowman,Joel M	0	1	5/3/2018	Bowman,Joel M

From the "Employee Status Details" drill, you have the option to drill on the number of forms Pending Pre-Review, Pre-Reviewed, Pending Certification, and Certified. This drill will take you to the **"Effort Analysis Details"** displaying the Award and Project information with the Payroll amounts, Certified amounts, Committed Effort, and related percentages.

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NOTE: The Effort Analysis Details drill will only display results if you have HR level security for the HR Department listed.

EFF_ANALYSIS_DRILL

Employee ID	Employee Name	HR Department Id	HR Department Desc	Reporting Period Begin Date	Reporting Period End Date	Charged Department Id	Charged Department Desc	Charged Award Number	Charged Award Description	Charged Project Id	Charged Project Desc	Sponsored Project	Original Payroll Amount ($)	Payroll Percentage (%)	Pre-Review Cost Share Amount ($)	Pre-Review Cost Share Percentage (%)	Certified Amount ($)	Certified Percentage (%)	Committed Effort (%)	Effort Variance (%)

2. The **Reporting Period Summary** view provides a summary of all form statuses at the Reporting Period level.

Select a view from the Drop-down Menu

Reporting Period Summary View

Reporting Period Begin Date	Reporting Period End Date	# of Forms Pending Pre-Review	# of Forms Pre-Reviewed	% of Forms Pending Pre-Review	% of Forms Pre-Reviewed	# of Forms Pending Certification	# of Forms Certified	% of Forms Pending Certification	% of Forms Certified
9/1/2019	2/29/2020	125	27	82.2%	17.8%	127	25	83.6%	16.4%
3/1/2019	8/31/2019	1	175	0.6%	99.4%	6	170	3.4%	96.6%
9/1/2018	2/28/2019	0	175	0.0%	100.0%	2	173	1.1%	98.9%
3/1/2018	8/31/2018	0	165	0.0%	100.0%	0	165	0.0%	100.0%
9/1/2017	2/28/2018	0	154	0.0%	100.0%	0	154	0.0%	100.0%

The option to drill to additional details is available on the Reporting Period Begin Date. This drill will display **"Reporting Period Details"** showing employee name and HR department information.

Reporting Period Begin Date	Reporting Per Date
9/1/2019	2/29/2020
3/1/201	Reporting Period Details
9/1/2018	2/28/2019
3/1/2018	8/31/2018

Reporting Period Begin Date	Reporting Period End Date	Employee ID	Employee Name	HR Department Id	HR Department Desc	Assigned Pre-Reviewer Name	# of Forms Pending Pre-Review	# of Forms Pre-Reviewed	Pre-Reviewed Date	Pre-Reviewer Name	Assigned Certifier Name	# of Forms Pending Certification	# of Forms Certified	Certified Date	Certifier Name
9/1/2019	2/29/2020	0000316	Bowman,Joel M	831010	ECAS: Chemistry	Snyder,Deborah	1	0		-	Bowman,Joel M	1	0		-
9/1/2019	2/29/2020	0001322	Liotta,Dennis C	831010	ECAS: Chemistry	Snyder,Deborah	0	1	4/9/2020	Snyder,Deborah	Liotta,Dennis C	0	1	4/9/2020	Liotta,Dennis C
9/1/2019	2/29/2020	0001523	Heaven,Michael C	831010	ECAS: Chemistry	Snyder,Deborah	1	0		-	Heaven,Michael C	1	0		-
9/1/2019	2/29/2020	0001996	Marsteller,Patricia	830050	ECAS: Ofc Research Fund Supprt	Franko,Joann C	0	1	3/20/2020	Franko,Joann C	Marsteller,Patricia	0	1	3/23/2020	Marsteller,Patricia
9/1/2019	2/29/2020	0009207	Hill,Craig Livingston	831010	ECAS: Chemistry	Snyder,Deborah	1	0		-	Hill,Craig Livingston	1	0		-
9/1/2019	2/29/2020	0021083	Musaev,Djamaladdin G	831010	ECAS: Chemistry	Snyder,Deborah	1	0		-	Musaev,Djamaladdin G	1	0		-

From the "Reporting Period Details" drill, you have the option to drill on the number of forms Pending Pre-Review, Pre-Reviewed, Pending Certification, and Certified. This drill will take you to the **"Effort Analysis Details"** displaying the Award and Project information with the Payroll amounts, Certified amounts, Committed Effort, and related percentages.

NOTE: The Effort Analysis Details drill will only display results if you have HR level security for the HR Department listed.

3. The **Employee Detail View** provides the same information as the “Employee Status Details” drill from the Employee Summary View. It includes options to drill on the Employee ID, Reporting Period Begin Date, and the number of forms Pending Pre-Review, Pre-Reviewed, Pending Certification, and Certified.

Select a view from the Drop-down Menu: Employee Detail View

Employee ID	Employee Name	HR Department Id	HR Department Desc	Reporting Period Begin Date	Reporting Period End Date	Assigned Pre-Reviewer Id	Assigned Pre-Reviewer Name	# of Forms Pending Pre-Review	# of Forms Pre-Reviewed	Pre-Reviewed Date	Pre Reviewer ID	Pre Reviewer Name	Assigned Certifier Id	Assigned Certifier Name	# of Forms Pending Certification	# of Forms Certified	Certified Date	Certifier ID	Certifier Name
0000316	Bowman,Joel M	831010	ECAS: Chemistry	9/1/2019	2/29/2020	0067734	Snyder,Deborah	1	0		-	-	0000316	Bowman,Joel M	1	0		-	-
0001322	Liotta,Dennis C	831010	ECAS: Chemistry	9/1/2019	2/29/2020	0067734	Snyder,Deborah	0	1	4/9/2020	0067734	Snyder,Deborah	0001322	Liotta,Dennis C	0	1	4/9/2020	0001322	Liotta,Dennis C
0001523	Heaven,Michael C	831010	ECAS: Chemistry	9/1/2019	2/29/2020	0067734	Snyder,Deborah	1	0		-	-	0001523	Heaven,Michael C	1	0		-	-
0001996	Marsteller,Patricia	830050	ECAS: Ofc Research Fund Supprt	9/1/2019	2/29/2020	0380142	Franko,Joann C	0	1	3/20/2020	0380142	Franko,Joann C	0001996	Marsteller,Patricia	0	1	3/23/2020	0001996	Marsteller,Patricia
0009207	Hill,Craig Livingston	831010	ECAS: Chemistry	9/1/2019	2/29/2020	0067734	Snyder,Deborah	1	0		-	-	0009207	Hill,Craig Livingston	1	0		-	-

4. The **Reporting Period Detail View** provides the same information as the “Reporting Period Details” drill from the Reporting Period Summary View. It includes options to drill on Reporting Period Begin Date, Employee ID, and the number of forms Pending Pre-Review, Pre-Reviewed, Pending Certification, and Certified.

Select a view from the Drop-down Menu: Reporting Period Detail View

Reporting Period Begin Date	Reporting Period End Date	Employee ID	Employee Name	HR Department Id	HR Department Desc	Assigned Pre-Reviewer Id	Assigned Pre-Reviewer Name	# of Forms Pending Pre-Review	# of Forms Pre-Reviewed	Pre-Reviewed Date	Pre Reviewer ID	Pre Reviewer Name	Assigned Certifier Id	Assigned Certifier Name	# of Forms Pending Certification	# of Forms Certified	Certified Date	Certifier ID	Certifier Name
9/1/2019	2/29/2020	0000316	Bowman,Joel M	831010	ECAS: Chemistry	0067734	Snyder,Deborah	1	0		-	-	0000316	Bowman,Joel M	1	0		-	-
9/1/2019	2/29/2020	0001322	Liotta,Dennis C	831010	ECAS: Chemistry	0067734	Snyder,Deborah	0	1	4/9/2020	0067734	Snyder,Deborah	0001322	Liotta,Dennis C	0	1	4/9/2020	0001322	Liotta,Dennis C
9/1/2019	2/29/2020	0001523	Heaven,Michael C	831010	ECAS: Chemistry	0067734	Snyder,Deborah	1	0		-	-	0001523	Heaven,Michael C	1	0		-	-
9/1/2019	2/29/2020	0001996	Marsteller,Patricia	830050	ECAS: Ofc Research Fund Supprt	0380142	Franko,Joann C	0	1	3/20/2020	0380142	Franko,Joann C	0001996	Marsteller,Patricia	0	1	3/23/2020	0001996	Marsteller,Patricia
9/1/2019	2/29/2020	0009207	Hill,Craig Livingston	831010	ECAS: Chemistry	0067734	Snyder,Deborah	1	0		-	-	0009207	Hill,Craig Livingston	1	0		-	-

TIP: Each of these views have 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.

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 Status Report, please contact the Analytics & Reporting team via the **Finance Support Center**. Choose **Emory Business Intelligence (EBI)/Reporting** as your ticket category.