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.
Dashboard: Effort Status Report
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.
Dashboard: Effort Status Report

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.

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.

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

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.

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.

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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.

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.

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