Weighted Effort Report – Effort Percentage by Employee

The Weighted Effort Report – Effort Percentage by Employee Report, allows research administrators to view an individual’s effort by cost object and G/L account for a selected period for time. Research administrators can execute this report for one or multiple exempt employees to view their cost distribution for an individual fiscal period or for multiple fiscal periods. Fiscal periods can cross fiscal years. The ability to view employees is not tied to payroll access. The report only includes effort percentage and funding information for base and supplemental pay for the selected exempt employee. It does not include salary dollars and cannot be executed for a non-exempt employee.

1. From the Grants Management page, select the Effort and Payroll Tools and Reports. Select Weighted Average Report – Effort Percentage by Employee to launch the report.
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2. In the Employee, field enter the Duke Unique Id Number (DUID) for the employee(s) of interest separating numbers with a semi-colon (;). Enter a single fiscal year/fiscal period (FY-period) or use the drop-down picker to select multiple (consecutive or non-consecutive) fiscal year/fiscal periods (FY-periods).

**Notes:** Users must enter the fiscal period as seven digits – four digits for the fiscal year and three digits with the first digit being zero – for the fiscal month.

Users can run the report across fiscal years.

Single DUID and single FY-Period view:

Multiple DUIDs and single FY-Period view:

Note: After entering DUIDs, select Check to display employee names.
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To select multiple FY-Periods:
After entering DUIDs, select the additional selections button to open the FY-Period picker.

In the selection screen, select the FY-period to include from Settlement Period. Users can choose one period or multiple periods and FY-periods can be consecutive or non-consecutive. If a user chooses a period in error, select the gray square to the left of the cost object to unselect the period. Once periods are highlighted, select Add to move dates to the Selections column. Select Ok to add the desired FY-periods and close the box.
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3. Once DUID(s) and FY-period(s) are entered, select OK.

4. In the returned report, the following information displays:

A. Employee’s Name
B. Employee’s Organizational Unit
C. Payment type – B = Base Pay; S = Supplemental Pay
D. Faculty appointment term – appointment information for faculty
   - 12 months = 12 month faculty appointment
   - 9 months paid over a designed period of time
   - Not assigned = displays if employee is not in a faculty position
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E. Cost object and cost object description. A separate line will display for each cost object and G/L account combination.

F. G/L Account used for the effort on the cost object. A separate line will display for each cost object and G/L account combination.

G. Cost distribution displays for each employee by cost object and G/L account for the fiscal periods entered.

*Note:* Cost distribution does not reflect iForm changes until Corporate Payroll executes a payroll run for the pay period in which the iForm was submitted.
5. To export the report, select **Export/Print Options** and choose the appropriate format.