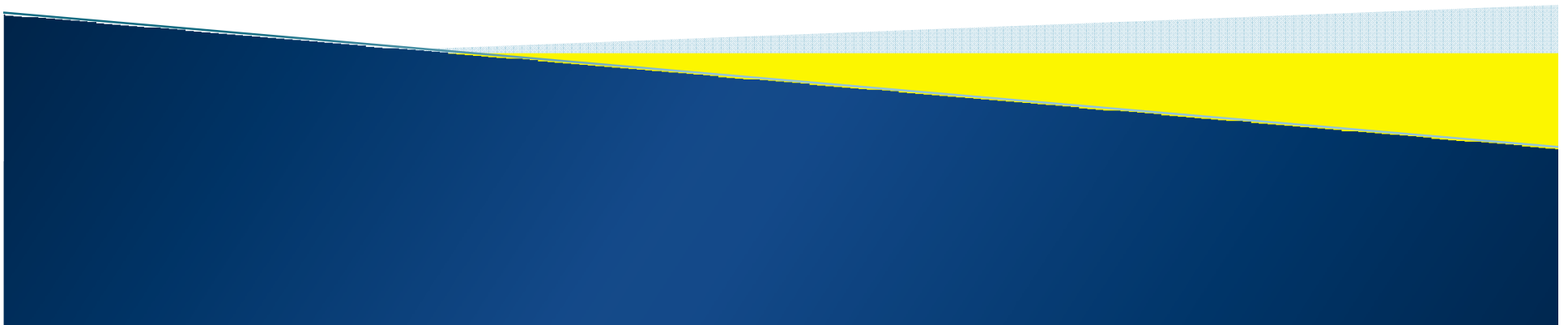


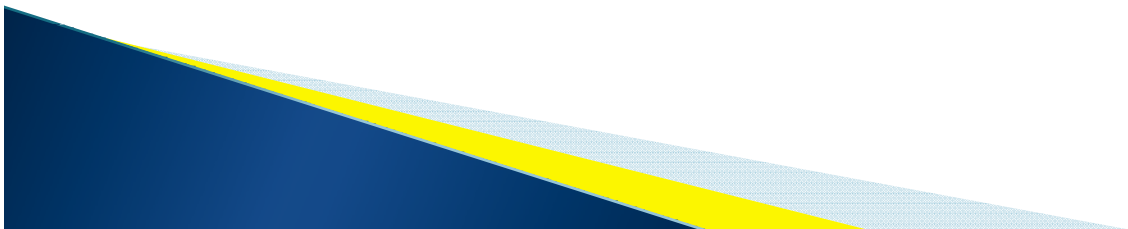
Effort Reporting and the LAM

December 2008



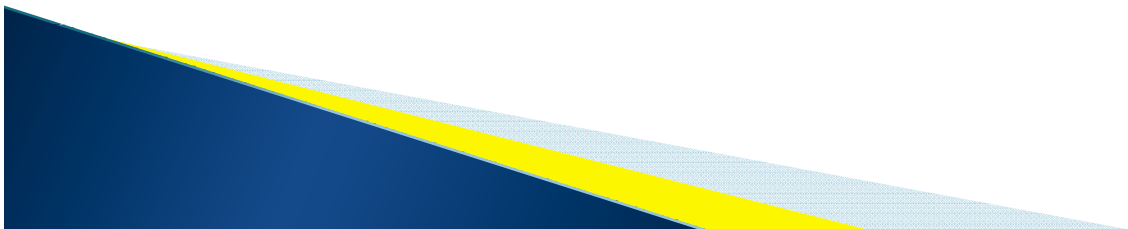
- ▶ Chris Cook
 - Assistant Provost
 - Research Office

- ▶ Matt Muldowney
 - Budget Analyst
 - Budget Office

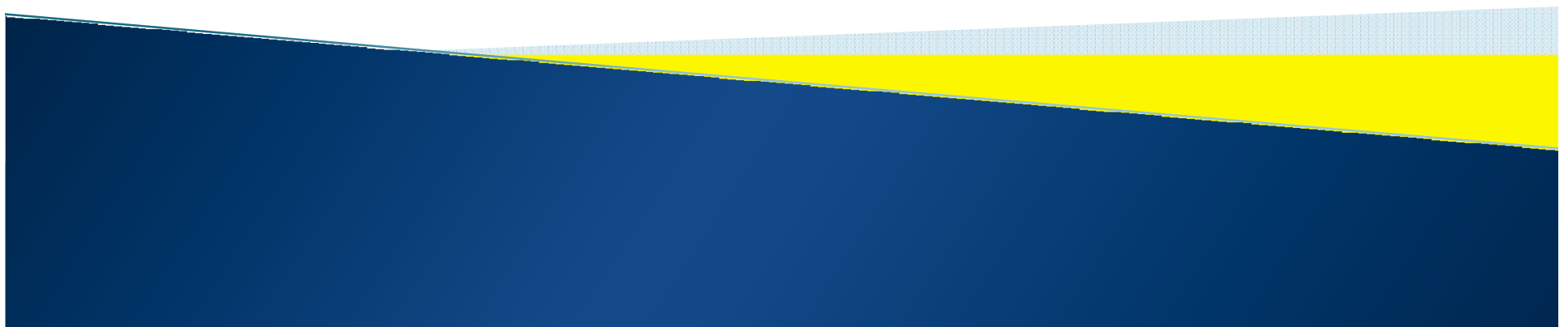


What you will learn...

- ▶ LAM basics
- ▶ How pay transactions are created
- ▶ Effort basics
 - Difference between LAM and Effort
- ▶ Workload applied to LAM vs. Effort
- ▶ How to use new LAM calculator

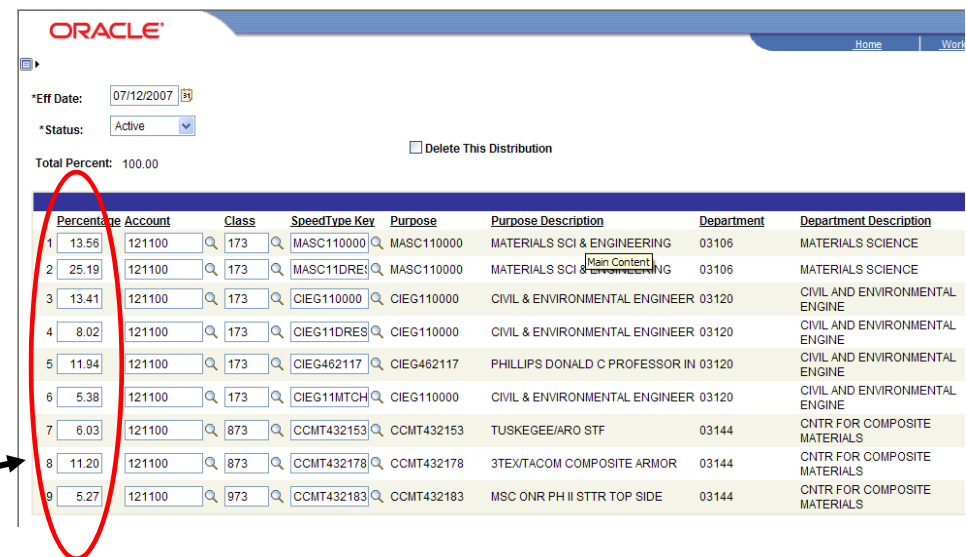


Labor Allocation Module



LAM – a brief overview

- ▶ Pay distributions allocated by percentage in LAM (PER PAY) based on HR amounts using chart fields assigned in the LAM.
- LAM changes made up to 2 days before payday
- Employee may have multiple distribution rows in LAM



ORACLE

*Eff Date: 07/12/2007

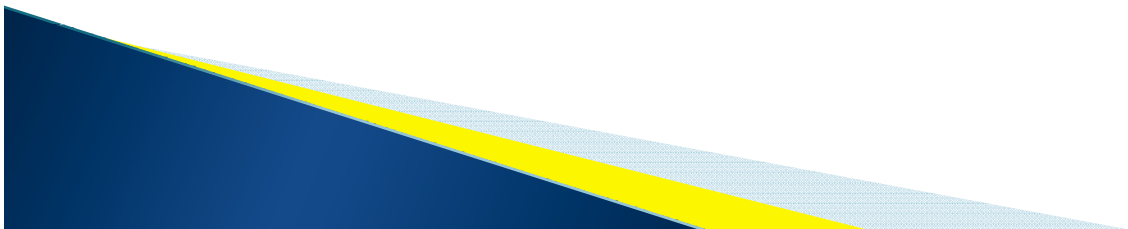
*Status: Active

Total Percent: 100.00

Percentage	Account	Class	SpeedType Key	Purpose	Purpose Description	Department	Department Description
13.56	121100	173	MASC110000	MASC110000	MATERIALS SCI & ENGINEERING	03106	MATERIALS SCIENCE
25.19	121100	173	MASC11DRES	MASC110000	MATERIALS SCI & ENGINEERING	03106	MATERIALS SCIENCE
13.41	121100	173	CIEG110000	CIEG110000	CIVIL & ENVIRONMENTAL ENGINEER	03120	CIVIL AND ENVIRONMENTAL ENGINE
8.02	121100	173	CIEG11DRES	CIEG110000	CIVIL & ENVIRONMENTAL ENGINEER	03120	CIVIL AND ENVIRONMENTAL ENGINE
11.94	121100	173	CIEG482117	CIEG482117	PHILLIPS DONALD C PROFESSOR IN	03120	CIVIL AND ENVIRONMENTAL ENGINE
5.38	121100	173	CIEG11MTCH	CIEG110000	CIVIL & ENVIRONMENTAL ENGINEER	03120	CIVIL AND ENVIRONMENTAL ENGINE
6.03	121100	873	CCMT432153	CCMT432153	TUSKEGEE/ARO STF	03144	CNTR FOR COMPOSITE MATERIALS
11.20	121100	873	CCMT432178	CCMT432178	3TEXTACOM COMPOSITE ARMOR	03144	CNTR FOR COMPOSITE MATERIALS
5.27	121100	973	CCMT432183	CCMT432183	MSC ONR PH II STR TOP SIDE	03144	CNTR FOR COMPOSITE MATERIALS

LAM – additional info

- ▶ Budget Office enters all initial new-hire regular employees' data; all future changes are entered by respective depts
- ▶ Grads on stipends & post docs are optional
 - Email Budget Office with name & Employee ID
 - Check LAM box on JED Webform
- ▶ Pay NOT included in the LAM
 - S-Contracts
 - Grad students paid by Grad Non-Contract Pay (GNCP)
 - Bi-weekly and Miscellaneous Wage employees



LAM – additional info contd.

- ▶ ‘Copy’ feature – helpful when entering additional line items for individuals with multiple distribution rows

UD Labor Allocation - Windows Internet Explorer

https://mod.nss.udel.edu:4480/psp/FIPRD/EMPLOYEE/ERP/c/UD_LABOR_ALLOC.UD_LABOR_ALLOC.GBL?FolderPath=PORTAL_ROOT_OBJECT.UD_PROCESSES.UD_LABOR_ALLOC.GBL&tsFolder=fal

ORACLE

UOD Distribution Maintenance

*SetID: UOD01

*EmpID: 701064275 Muldowney, Matthew R

*Eff Date: 09/15/2008

*Status: Active

Total Percent: 100.00

Delete This Distribution

Copy This Distribution To New Effective Date 11/19/2008

Percentage	Account	Class	SpeedType Key	Purpose	Purpose Description	Department	Department Description	Fund	Program	Project	Source	UD Chartfield
1	100.00	120200	004	BUDG110000	BUDG110000	BUDGET OFFICE	BUDGET OFFICE	OPBAS	ADALL			

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display Include History

Trusted sites 100%

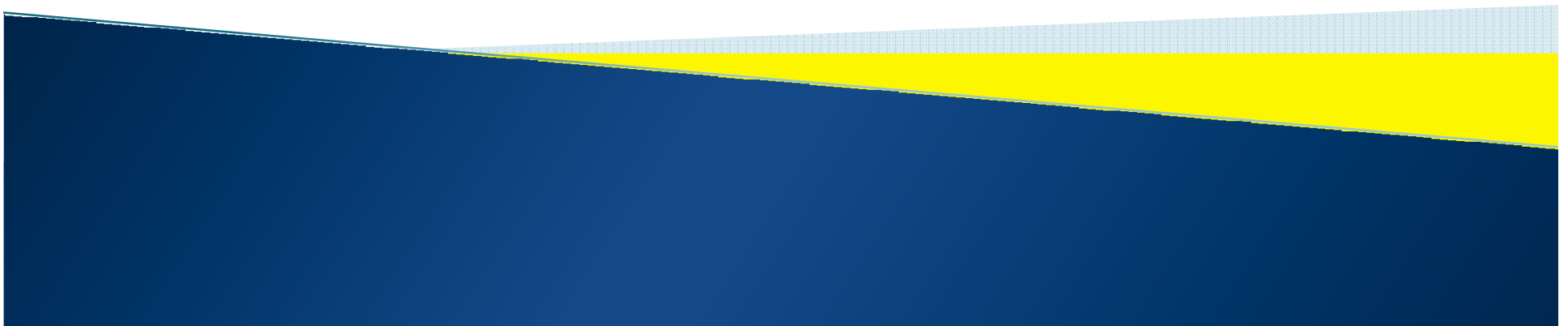
LAM – additional info contd.

- ▶ Accurate Speedtype selected is important
 - Auto-populates the Purpose and Program Code
 - Triggers unique Program code to capture applicable Workload Category
- ▶ Four typical Speedtypes for 1–book:

Speedtype	Purpose	Program
ABCD110000 (Instruction)	ABCD110000	INST1
ABCD11MTCH (Match)	ABCD110000	RSCH6
◦ ABCD11DRES (Research)	ABCD110000	INST2
ABCD11PSER (Pub Service)	ABCD110000	PUBSV

- ▶ ProjectID on non–grant codes indicates a cost/share (match) relationship to grant

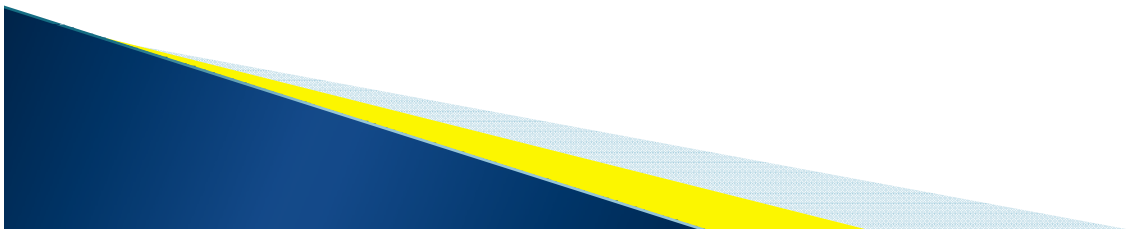
Pay transactions, start to finish



Pay Transactions, Start to Finish



*Job Employee Data



UD Fin/LAM updates transactions

- ▶ Pay data is first filtered through LAM
- ▶ Empl IDs used to match HR pay data to LAM
- ▶ LAM distributions applied to pay transactions based upon %'s

UOD Distribution Maintenance

*SetID:

*EmplID: Gillespie, John

*Eff Date:

*Status:

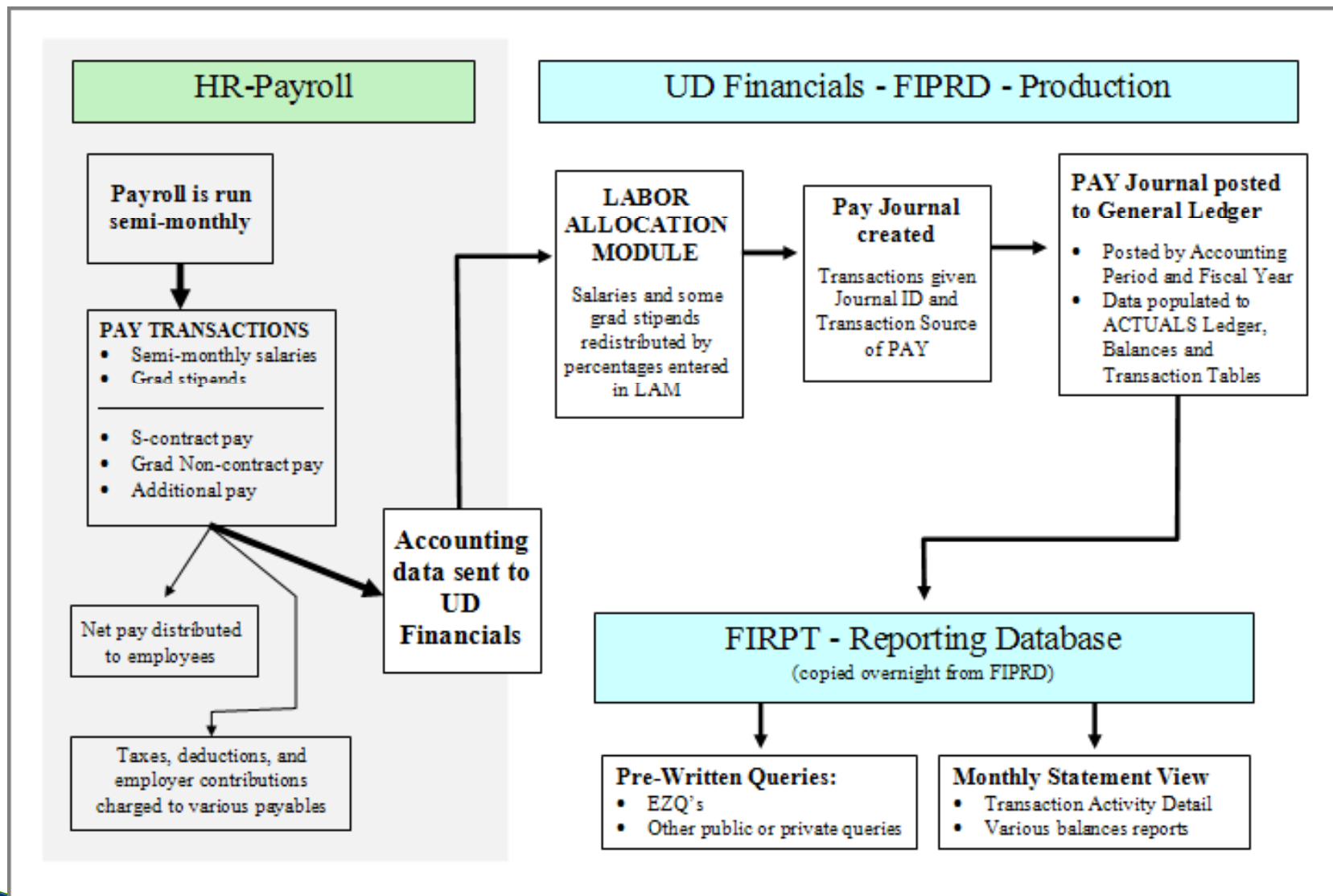
Total Percent: 100.000

Dumbledore, Albus » This Distribution

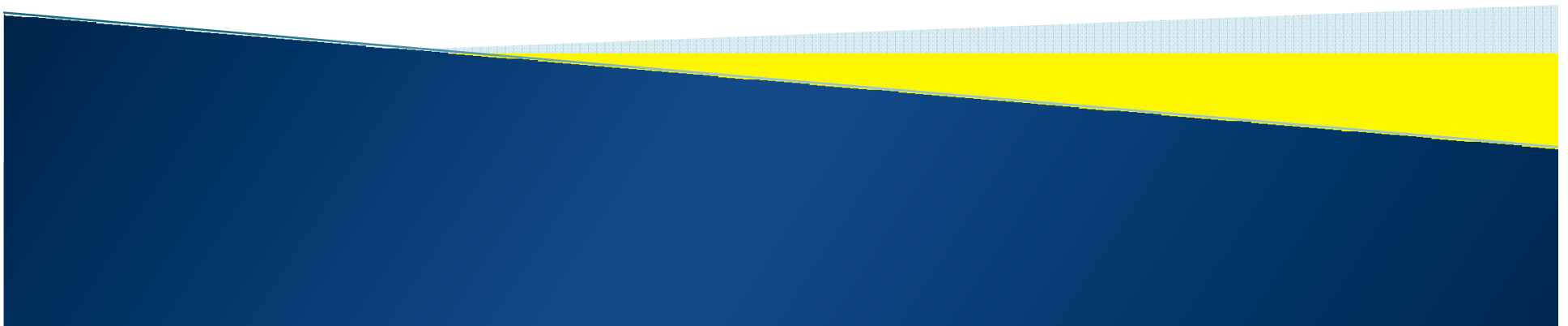
Percentage	Account	Class	SpeedType Key	Purpose	Purpose Description	Department	Department Description	Fund	Program	Project	So
12.56	<input type="text" value="121100"/>	<input type="text" value="173"/>	<input type="text" value="MASC110000"/>	MASC110000	MATERIALS SCI & ENGINEERING	03106	MATERIALS SCIENCE	OPBAS	INST1	<input type="text"/>	<input type="checkbox"/>
23.33	<input type="text" value="121100"/>	<input type="text" value="173"/>	<input type="text" value="MASC11DRE"/>	MASC110000	MATERIALS SCI & ENGINEERING	03106	MATERIALS SCIENCE	OPBAS	INST2	<input type="text"/>	<input type="checkbox"/>
18.00	<input type="text" value="121100"/>	<input type="text" value="173"/>	<input type="text" value="CIEG110000"/>	CIEG110000	CIVIL & ENVIRONMENTAL ENGINEER	03120	CIVIL AND ENVIRONMENTAL ENGINE	OPBAS	INST1	<input type="text"/>	<input type="checkbox"/>
18.00	<input type="text" value="121100"/>	<input type="text" value="173"/>	<input type="text" value="CIEG11DRES"/>	CIEG110000	CIVIL & ENVIRONMENTAL ENGINEER	03120	CIVIL AND ENVIRONMENTAL ENGINE	OPBAS	INST2	<input type="text"/>	<input type="checkbox"/>
5.41	<input type="text" value="121100"/>	<input type="text" value="973"/>	<input type="text" value="CIEG110000"/>	CIEG110000	CIVIL & ENVIRONMENTAL ENGINEER	03120	CIVIL AND ENVIRONMENTAL ENGINE	OPBAS	INST1	<input type="text"/>	<input type="checkbox"/>
6.17	<input type="text" value="121100"/>	<input type="text" value="873"/>	<input type="text" value="CCMT432153"/>	CCMT432153	TUSKEGEE/ARO STF	03144	CNTR FOR COMPOSITE MATERIALS	OPBAL	RSCH5	CCMT43215305000	89
16.53	<input type="text" value="121100"/>	<input type="text" value="873"/>	<input type="text" value="CCMT432178"/>	CCMT432178	3TEX/TACOM COMPOSITE ARMOR	03144	CNTR FOR COMPOSITE MATERIALS	OPBAL	RSCH3	CCMT43217807000	89



Pay Transaction Flow Chart



Effort Reporting



Effort Reporting – just the basics

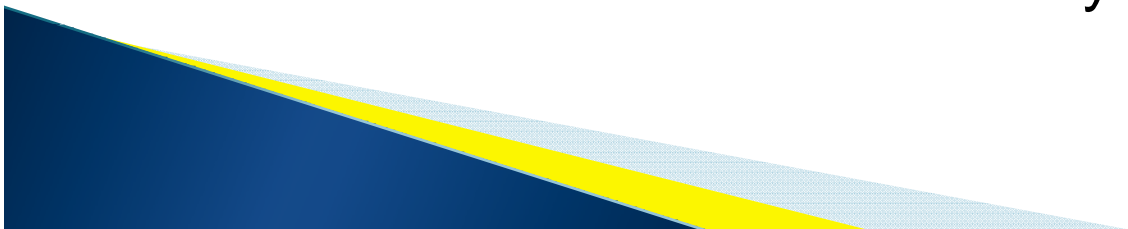
- ▶ A Federal requirement for organizations receiving federal funding
- ▶ Percentage of **time** spent on work-related activities for which UD pays a person
- ▶ This provides assurance that:
 1. Salaries charged to sponsored projects are reasonable in relation to the work performed
 2. Faculty/staff have met their commitments to sponsored projects
- ▶ **Person certifies his/her own effort**
- ▶ UD certifies twice annually
 - Sept – Feb
 - March – August



Effort % by appointment type

Appointment Type	% if +3 summer months	% if +2 summer months	% if +1 summer months
9-month	8.3%	9%	10%
10-month	N/A	8.3%	9%
11-month	N/A	N/A	8.3%
12-month	8% for any month		

“Ninth” is a term used to define “summer month”.
Summer months are defined by appointment type.



Effort and LAM – comparison

Effort Report	LAM
% of TIME (per effort period)	% of MONEY (per pay)
Based on full year; reported each 6 months	Based on appointment type and spread over 12 months
Includes academic year and summer research months	Includes Base Salary, Ninths and Admin. Supplements per offer
Reflects workload grouped by sponsored and non-sponsored activity using chartfields	Chartfields critical to accuracy of pay distribution
Not dependent on a 40 hour work week	
Includes summer S-contracts	Does NOT include Summer S-contracts
Must = 100%	Must = 100%

Comparison – Effort vs. Lam %'s

9-month faculty paid over 12 months, with 3 months of summer research pay:

Academic Year

Effort

TIME Effort 1 mo = 1/12 or 8.3%	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG
	8.3%	8.3%	8.3%	8.3%	8.3%	8.3%	8.3%	8.3%	8.3%	8.3%	8.3%	8.3%

EFFORT is based on 12 mos.

INCLUDES:
LAM pay and S-contract pay

PAYROLL:

LAM

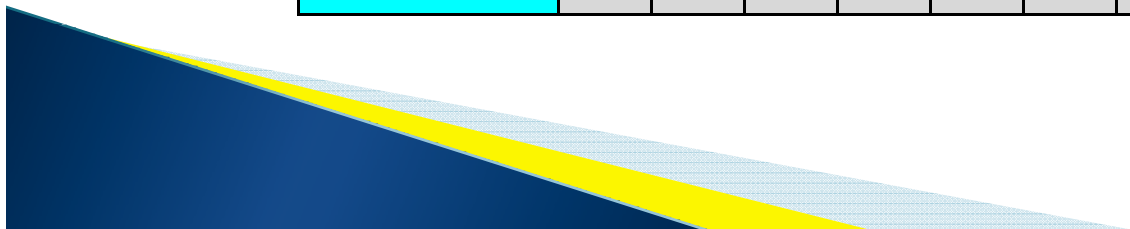
PAY LAM 1 mo = 1/9 or 11%	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY
	11%	11%	11%	11%	11%	11%	11%	11%	11%

PAY is 9 mos. paid over 12
INCLUDES:
Base pay, ninths & admin. supplements

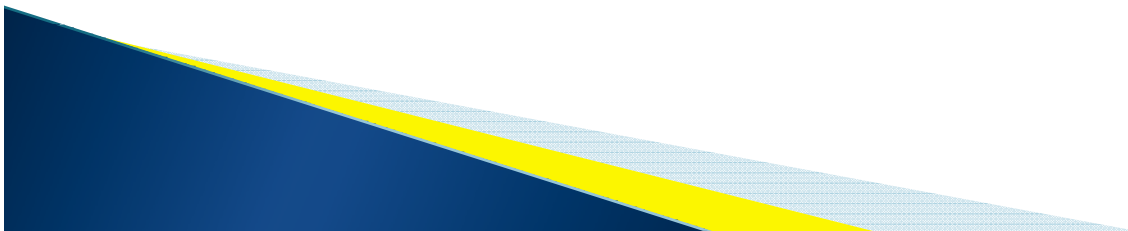
not in LAM

PAY Summer S-Contract	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG

PAY is not included in the LAM



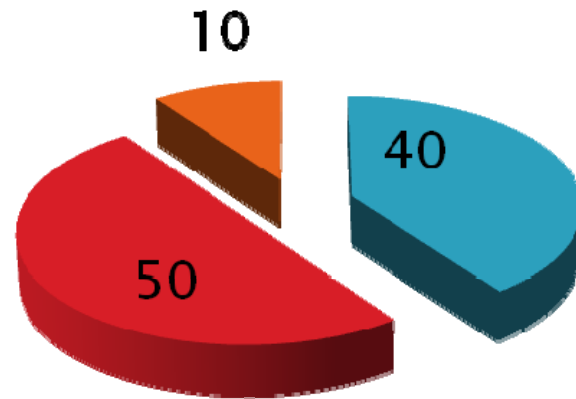
Workload



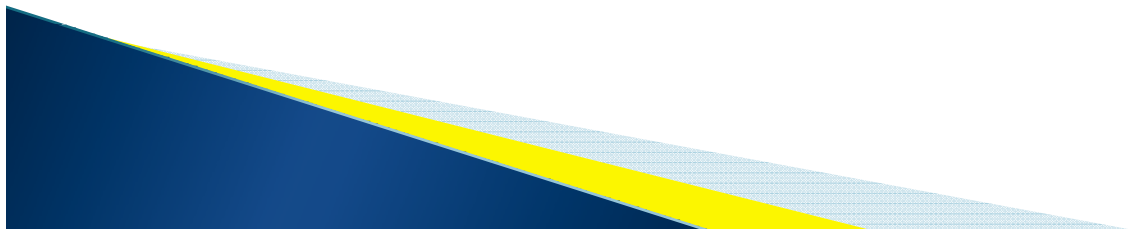
Workload – a definition

▶ Percentage of faculty time assigned:

- Research
- Teaching
- Service
 - Public
 - UD/Department

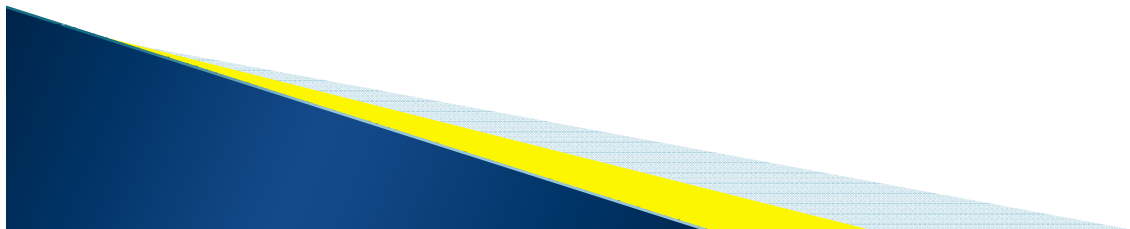


- Research
- Instruction
- Service

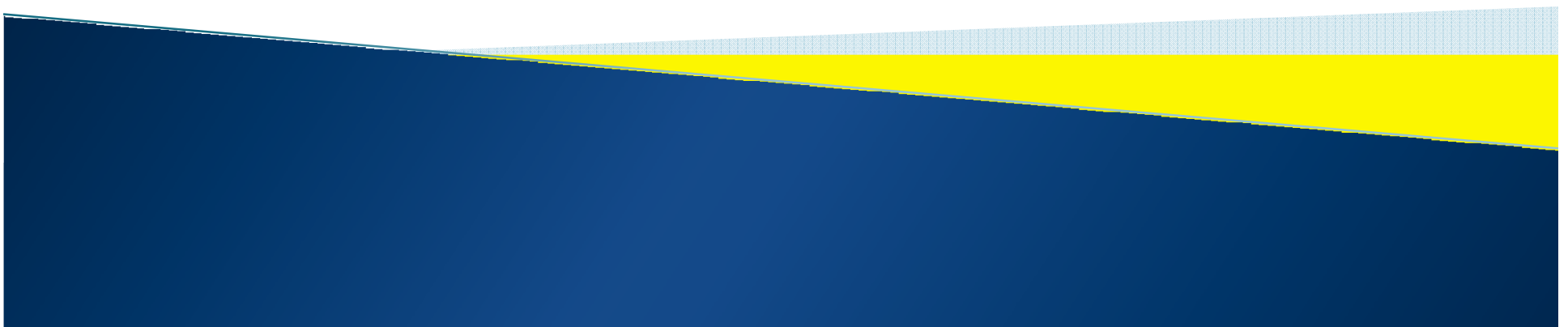


Workload

- ▶ Impacts both LAM and Effort Reporting
- ▶ LAM – by percentage, determines the accounting entries for salary expenses for regular employees
 - Total adds to 100%
- ▶ Effort – determined by actual work time percentages
 - Should track with Effort commitment in award budget(s)
 - Total adds to 100% and *not more*



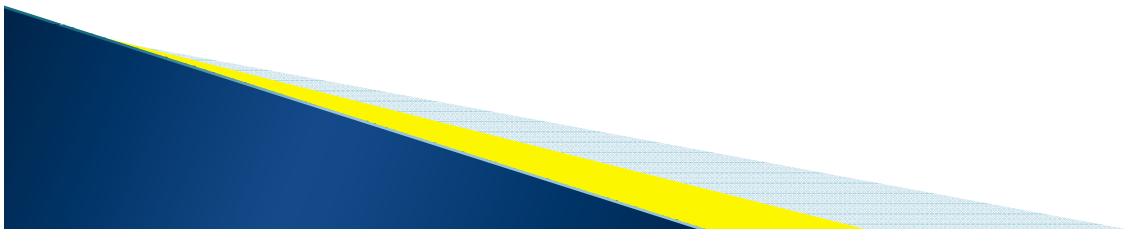
A simple example



Setting the scene...

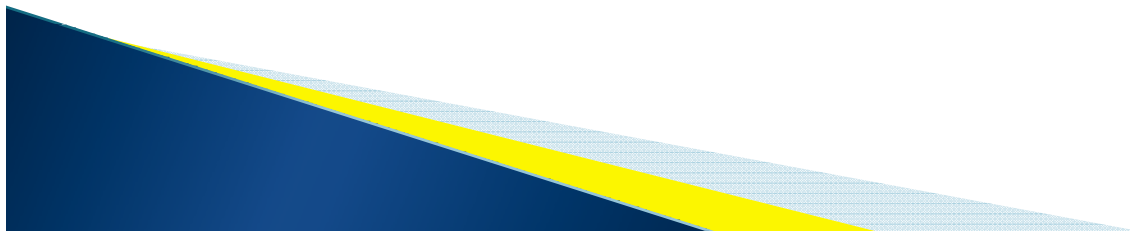
- ▶ Prof. Albus Dumbledore (AD) hired 9/1/08 by Chemistry (9-month faculty)
 - Dept completes JED with permanent funding
 - Budget Office creates initial LAM entry
- ▶ AD's semester workload is:
 - Teaching two 3-credit classes Fall/Spring – 50%
 - Public Service – 10%
 - Research – 40%
- ▶ AD does research in summer up to 3 months paid as s-contract

to be continued...



LAM entries effective 9/1/08

Workload Category	%	Speedtype	Purpose	Class	Program	ProjectID
Instruction	50	CHEM110000	CHEM110000	104	INST1	
Research	40	CHEM11DRES	CHEM110000	104	INST2	
Service	10	CHEM11PSER	CHEM110000	104	PUBSV	



Grant awarded 10/1/08

- ▶ Dumbledore is awarded NSF grant: *“Effect of Spells on Muggle Brain Chemistry”*
 - Grants runs 10/1/08 – 9/30/10
 - Budget includes 10% of AD’s salary for academic year and 2 summer months (s-contract)

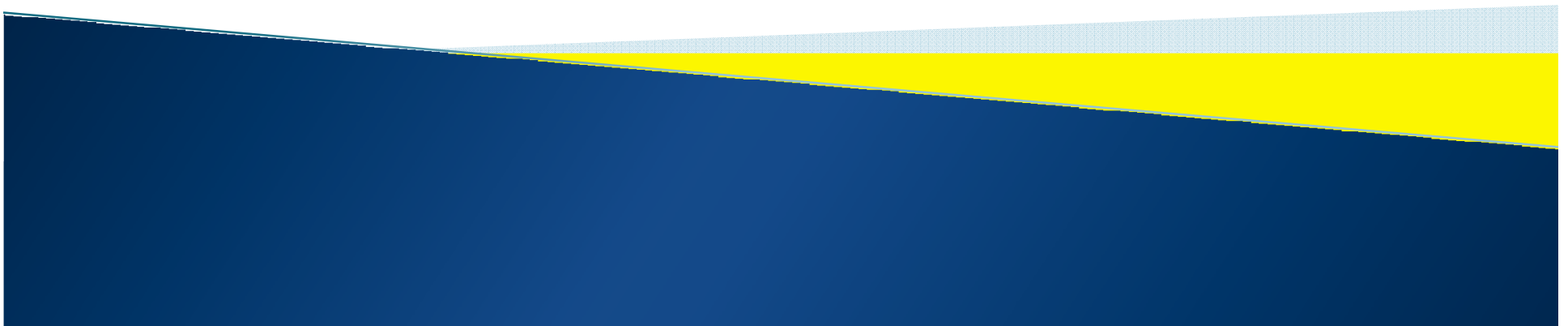


Effort % vs. Lam % – don't panic

- ▶ Time Periods are different
 - Effort % is for 6 months
 - LAM % is PER pay period
 - LAM will not include Summer S-contracts



**Let's look at the LAM
calculator tool...**



LAM calculator—helpful TOOL

- ▶ In production www.udel.edu/LAM
- ▶ For reference only—not creating entries
- ▶ Printable, screen shots, etc.
- ▶ not saving for future



www.udel.edu/LAM -> UD processes->UOD Grants LAM Calc

The screenshot shows the Oracle UOD Grants LAM Calc tool interface. On the left is a navigation menu with 'UOD Grants LAM Calc' highlighted in a red circle. The main content area is titled 'Uod Grants Lam Calc' and contains a 'Clear calculation' checkbox and a 'To use this calculator, enter the values as indicated below and tab out of the fields.' instruction. Below this are four input fields, each with a red arrow pointing to it:


- Enter Total Annual Salary [input field]
- Enter Total Effort % committed for this bud period [input field] %
Or Salary to be distributed for this grant for this bud period [input field]
- Enter Number of months remaining in this budget period [input field]
Or number of pay periods for distribution [input field]
- Enter As of Date [input field]

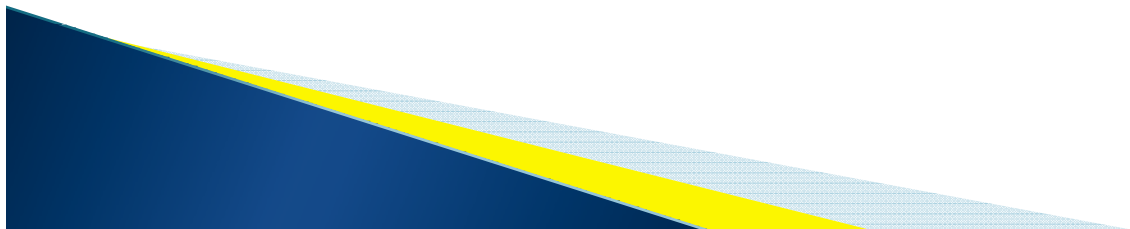
**!Use this tool for LAM entries—
Not S-Contracts (Summer Research)!**

Enter the data required

Uod Grants Lam Calc

To use this calculator, enter the values as indicated below and tab out of the fields.

Enter	Total Annual Salary	<input type="text" value="\$50,000.00"/>
Enter	Total Effort % committed for this bud period	<input type="text" value="10.00"/> %
Or	Salary to be distributed for this grant for this bud period	<input type="text" value="\$5,000.00"/>
Enter	Number of months remaining in this budget period	<input type="text" value="12.0"/>
Or	number of pay periods for distribution	<input type="text" value="24"/>
Enter	As of Date	<input type="text" value="10/1/2008"/> 



Tab out of last field and...

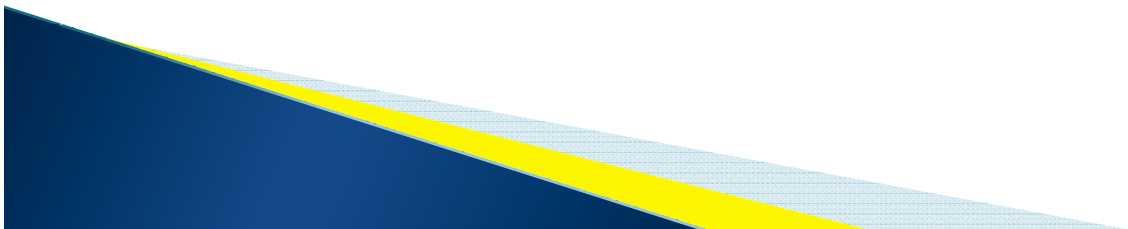
Uod Grants Lam Calc

To use this calculator, enter the values as indicated below and tab out of the fields. Clear calculation

Enter	Total Annual Salary	\$50,000.00
Enter	Total Effort % committed for this bud period	10.00 %
Or	Salary to be distributed for this grant for this bud period	\$5,000.00
Enter	Number of months remaining in this budget period	12.0
Or	number of pay periods for distribution	24
Enter	As of Date	10/01/2008 <input type="text"/>

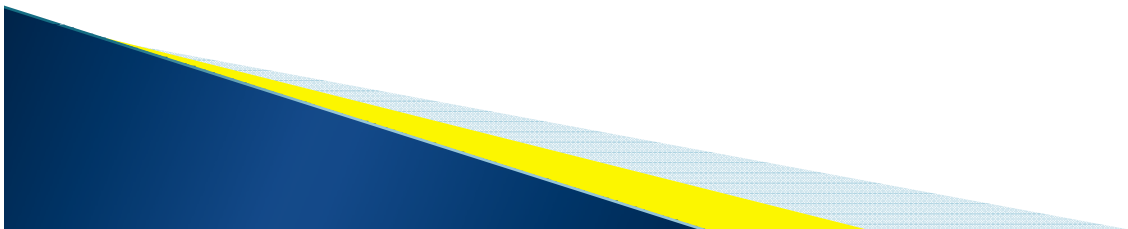
09/30/2009 Final Pay Date

Effort Period	091, AY09 9/1/2008-3/31/2009	\$2,083	distribute on grant for this effort period
LAM %	10.00	5.0	number of months remaining in effort period
Effort Report %	8.33	10	number pay periods allocated in this effort period
		\$20,833.33	total salary for effort period
Effort Period	092, AY09 3/1/2009-8/31/2009	\$2,500	distribute on grant for this effort period
LAM %	10.00	6.0	number of months remaining in effort period
Effort Report %	10.00	12	number pay periods allocated in this effort period
		\$25,000.00	total salary for effort period
Effort Period	101, AY10 9/1/2009-2/28/2010	\$417	distribute on grant for this effort period
LAM %	10.00	1.0	number of months remaining in effort period
Effort Report %	1.67	2	number pay periods allocated in this effort period
		\$4,166.67	total salary for effort period



Once calculated...

- ▶ Only relevant effort periods shown in results
- ▶ Print for records or capture screen shot
- ▶ Can clear screen to use again with 'clear calculation'



LAM entries effective 10/1/08

Workload Category	%	Speedtype	Purpose	Class	Program	ProjectID
Instruction	50	CHEM110000	CHEM110000	104	INST1	
Research	30	CHEM11DRES	CHEM110000	104	INST2	
Research	10	CHEM312111	CHEM312111	104	RSCH1	CHEM31211108000
Service	10	CHEM11PSER	CHEM110000	104	PUBSV	



Check 'clear calculation' box to clear data

Uod Grants Lam Calc

To use this calculator, enter the values as indicated below and tab out of the fields.

Clear calculation

Enter Total Annual Salary \$50,000.00

Enter Total Effort % committed for this bud period 10.00 %
Or Salary to be distributed for this grant for this bud period \$5,000.00

Enter Number of months remaining in this budget period 12.0
Or number of pay periods for distribution 24

Enter As of Date 10/01/2008 09/30/2009 Final Pay Date

Effort Period 091
LAM % 1
Effort Report %

Effort Period 092
LAM % 1
Effort Report %

Effort Period 101, AY10 9/1/2009-2/28/2010 \$417 distribute on grant for this effort period
LAM % 10.00 1.0 number of months remaining in effort period
Effort Report % 1.67 2 number pay periods allocated in this effort period
\$4,166.67 total salary for effort period

Save

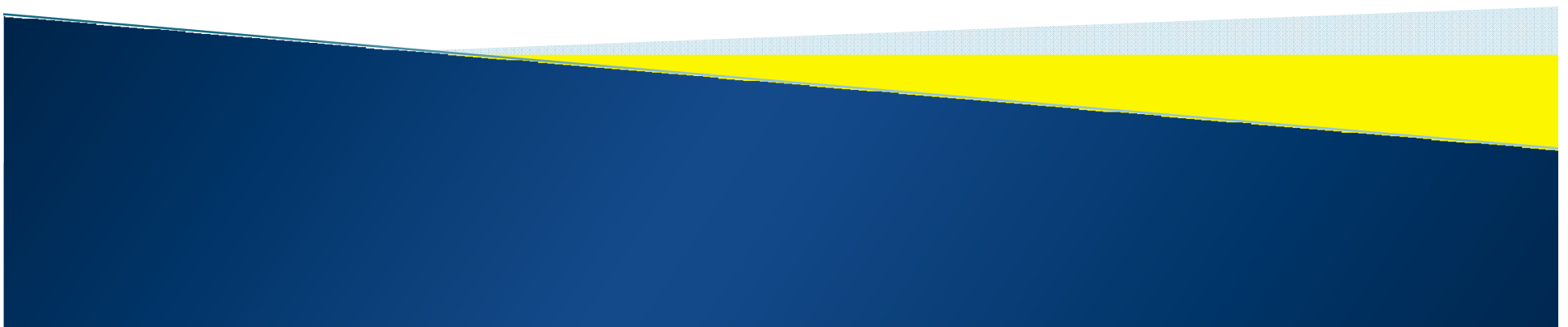
Windows Internet Explorer

This will clear the calculation upon save. (9999,999)

OK



A second (less simple) example



Grant awarded 11/1/08


- ▶ Dumbledore's faculty colleague, Dr. Slugworth is awarded NFS grant: *"Slugs and the environment"*
 - Grants runs 11/1/08 – 10/31/09
 - Effort committed includes 15% of Slugworth's salary for academic year of which only 5% is funded by the sponsor.
 - Slugworth informs the department administrator about this award on 12/10/08.

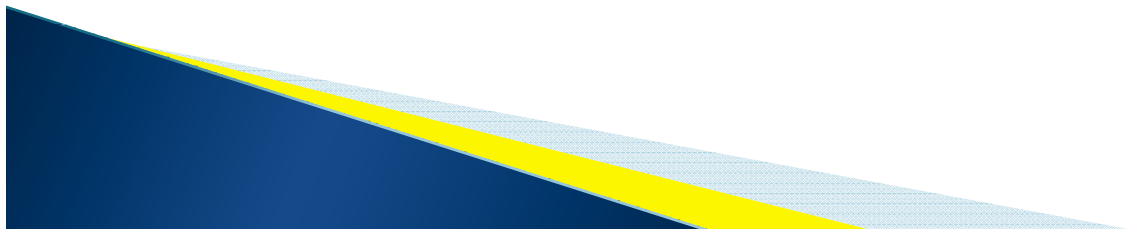
Let's calculate for Slugworth

Uod Grants Lam Calc

To use this calculator, enter the values as indicated below and tab out of the fields.

Clear calculation

Enter	Total Annual Salary	<input type="text" value="\$50,000.00"/>
Enter	Total Effort % committed for this bud period	<input type="text" value="5.00"/> %
Or	Salary to be distributed for this grant for this bud period	<input type="text" value="\$2,500.00"/>
Enter	Number of months remaining in this budget period	<input type="text" value="10.5"/>
Or	number of pay periods for distribution	<input type="text" value="21"/>
Enter	As of Date	<input type="text" value="12/15/2008"/> 



Results for the 5% funded by NSF

Uod Grants Lam Calc

To use this calculator, enter the values as indicated below and tab out of the fields.

Clear calculation

Enter Total Annual Salary

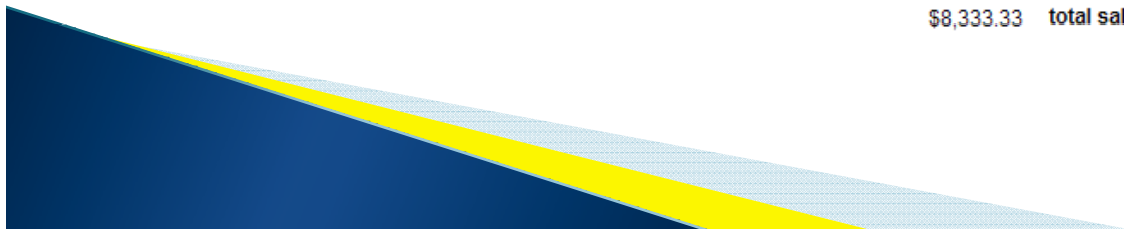
Enter Total Effort % committed for this bud period %
 Or Salary to be distributed for this grant for this bud period

Enter Number of months remaining in this budget period
 Or number of pay periods for distribution

Enter As of Date

10/31/2009 Final Pay Date

Effort Period	091, AY09 9/1/2008-3/31/2009	\$595	distribute on grant for this effort period
LAM %	5.71	2.5	number of months remaining in effort period
Effort Report %	2.38	5	number pay periods allocated in this effort period
		\$10,416.67	total salary for effort period
Effort Period	092, AY09 3/1/2009-8/31/2009	\$1,429	distribute on grant for this effort period
LAM %	5.71	6.0	number of months remaining in effort period
Effort Report %	5.72	12	number pay periods allocated in this effort period
		\$25,000.00	total salary for effort period
Effort Period	101, AY10 9/1/2009-2/28/2010	\$476	distribute on grant for this effort period
LAM %	5.71	2.0	number of months remaining in effort period
Effort Report %	1.90	4	number pay periods allocated in this effort period
		\$8,333.33	total salary for effort period



Results for the 10% NOT funded by NSF

[Link](#)

Uod Grants Lam Calc

To use this calculator, enter the values as indicated below and tab out of the fields.

Clear calculation

Enter Total Annual Salary

Enter Total Effort % committed for this bud period %
 Or Salary to be distributed for this grant for this bud period

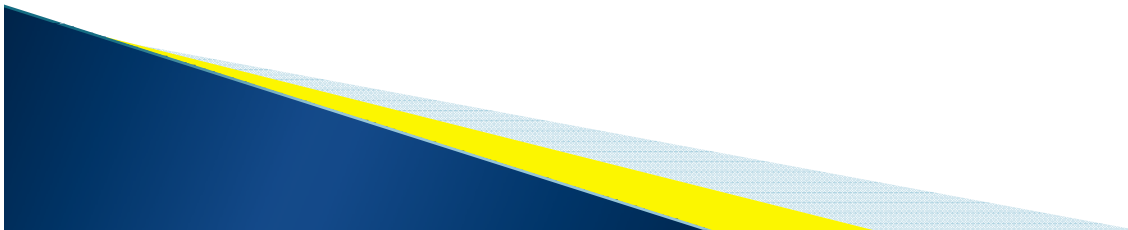
Enter Number of months remaining in this budget period
 Or number of pay periods for distribution

Enter As of Date

10/31/2009 Final Pay Date

Simply change the 5% to 10% in the effort % box and it will recalculate!

Effort Period	091, AY09 9/1/2008-3/31/2009	\$1,190	distribute on grant for this effort period
LAM %	11.43	2.5	number of months remaining in effort period
Effort Report %	4.76	5	number pay periods allocated in this effort period
		\$10,416.67	total salary for effort period
Effort Period	092, AY09 3/1/2009-8/31/2009	\$2,857	distribute on grant for this effort period
LAM %	11.43	6.0	number of months remaining in effort period
Effort Report %	11.43	12	number pay periods allocated in this effort period
		\$25,000.00	total salary for effort period
Effort Period	101, AY10 9/1/2009-2/28/2010	\$952	distribute on grant for this effort period
LAM %	11.43	2.0	number of months remaining in effort period
Effort Report %	3.81	4	number pay periods allocated in this effort period
		\$8,333.33	total salary for effort period



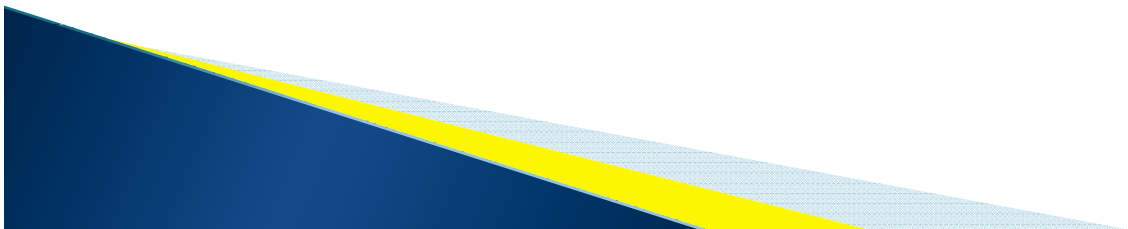
LAM entries effective 12/15/08

Workload Category	%	Speedtype	Purpose	Class	Program	ProjectID
Instruction	50	CHEM110000	CHEM110000	104	INST1	
Research	22.86	CHEM11DRES	CHEM110000	104	INST2	
Research	5.71	CHEM312122	CHEM312122	104	RSCH1	CHEM31212208000
Research	11.43	CHEM11MTCH	CHEM110000	104	RSCH6	CHEM31212208000
Service	10	CHEM11PSER	CHEM110000	104	PUBSV	



Tips & Tricks

- ▶ Careful of big budget periods
 - Calculator will display up to 4 effort periods
 - Warning to break period for calculations
- ▶ Use for S-contracts to explain to faculty
- ▶ Save screen shots for reference at Effort Period review



Questions?

Budget Office for help with LAM use
X1234

Research Office for help with LAM calculator
x2136

