Computing Division Report Requirements for the FTL Effort System

To provide easier access to data as well as specialized reports for the Computing Division, work effort entered by Computing Division monthly employees to the new FTL Lab Effort Reporting System will be stored in the CD enterprise database. The data will contain only approved effort entries and will be updated on a weekly base.

This document describes the set of reporting requirements for the FTL data uploaded to the CD enterprise database. This set of reports will be developed as new reports using an appropriate report platform (such as Crystal Reports) allowing better flexibility and much shorter turnaround time.

Computing Division FTL Report Requirements

There are four major ways of viewing effort entries:

- **By Person:** list activities, effort reported (calculated etc), charged task and budgeted effort
- **By Activity:** list persons, effort reported (calculated etc), charged task and budgeted effort
- **By Project-Task:** list activities, person, effort reported (calculated etc) and budgeted effort
- **Spreadsheet listing:** list all available information: activities, project-task, person, effort reported, calculated etc in a spreadsheet, so that the user can sort the list as needed

The reports will also include the following information:

- Total budgeted/remaining FTEs per activity as budgeted in the Budget Input System
- Total budgeted/remaining budget (dollar amount) per project-task in the Lab System (restricted to authorized reviewers)

Matthew Arena 4/8/09 8:48 AM
Comment: Do we have this data? If so, where?

Penelope Constanta 4/8/09 12:07 PM
Comment: The people who might have access to these data are Vicky and Mike for the whole division and for a particular group the leaders who know people salaries.

Report User Interface

For the above set of reports the users will be able to select:

- **By Person**
  - The organization
  - The reporting date range
- **By Activity**
  - The activity owning organization
  - The reporting date range
- **By Project/Task**
  - The project/task owning organization

- The reporting date range

Report Interactivity – Drill Down

All report types (except the spreadsheet one) will exploit drill down techniques to enable navigation from higher level objects to more details. For example, from upper-level organizations drill into lower level organizations for more detail.

FTL System Native Reports

The FTL system will not provide any reports only a number of Discoverer queries. To see the current set of queries refer to URL:

https://bss-support.fnal.gov/project/bspta.nsf/tasklink/12744

Current Effort Reporting System Reports

The following types of reports are available for Supervisors: All reports allow selection of CD Department/Group and month that information is requested for. In all the reports, there is a button next to the Employee's name that provides the effort reported by that employee for all previous months, in descending order.

- **Reports for Entry Checking:** These reports are real time reports and entries can be review immediately for the current month. Please, be patient; they're slow.
    - ***Effort (as entered) By Person:*** Lists the Activity and the Effort percent an employee entered, the list is sorted by employee name. If the whole Division is chosen ("FL/CD"), this report also, summarizes the people who have not reported their effort yet.
    - ***Effort (as entered) By Activity:*** Lists the Activity and the Effort percent an employee entered. The list is sorted by Activity name.
- **Reports for Effort Reviewing:** These reports are for supervisor reviewing purposes. These reports are made available for the current report month during the review period (after the system closes for effort entry). These reports are not real time. During the review period, they are updated once or twice a day.
    - ***By Activity Owning CD Department:*** Lists all Activities owned by a department and the employees who reported effort to it. Information is listed in three lines: the first line lists Employee information; the second line lists the Activity name and the Effort Percentage as reported to the system; the third line lists the Project - Task number, the Task Name and the percentage that will be charged to it.
    - ***By Task Owning CD Department:*** Lists all Tasks owned by a department and the employees who reported effort to it. Information is listed in three lines: the first line lists Employee information; the second line lists the Project - Task number, the Task Name and the percentage that will be charged to it; the third line lists the Activity name and the Effort Percentage as reported to the system.
    - ***By Personnel Group (sorted by Activity):*** Lists all Employees in a department sorted by the Activity name that effort was reported to. Information is listed in three lines: the first line lists Employee information; the second line lists the Activity name and the Effort Percentage as reported to the system; the third line lists the Project - Task number, the Task Name and the percentage that will be charged to it.
    - ***By Personnel Group (sorted by Task):*** Lists all Employees in a department sorted by the Project Number - Task Number that effort was charged to. Information is listed in three lines: the first line lists Employee information; the second line lists

the Project - Task number, the Task Name and the percentage that will be charged to it; the third line lists the Activity name and the Effort Percentage as reported to the system.

- ***Accounting Reports:*** These reports are sent to the lab accounting system at the end of the month. They include only monthly and weekly personnel (contractors, guest scientists etc. are not listed).

  A person's time (effort percent) reported as vacation, sick etc. (OPTO) is distributed among the rest of the Activities that are charged to Project Tasks so that the total effort charged to these Project Tasks is 100%. The following are the calculation steps:

  First, it is calculated the sum of all effort charged to OPTO (***SUM-OPTO***) and the sum of all other effort (***SUM-ACT***).

  Then, for each ***REPORTED-EFFORT*** to an activity, the compensated for OPTO percentage is calculated as: ***(SUM-OPTO / SUM-ACT) * (REPORTED-EFFORT) + (REPORTED-EFFORT)***

  - ***For Accounting by Personnel Last Name:*** Lists all Employees in a department sorted by Employee name. The information is listed in two lines: the first line lists Employee information; the second line lists the Project - Task number, the Task Name and the percentage that will be reported to accounting after it has been adjusted to compensate for OPTO (vacation, sick, jury duty etc.)
  - ***For Accounting by Project-Task Number:*** Lists all Tasks in a department sorted by Project Number - Task Number. The information is grouped by Project Number and then Task Number, for each task number all employees whose effort will be reported to the Project Number - Task Number are listed along with the percentage that will be reported to accounting after it has been adjusted to compensate for OPTO (vacation, sick, jury duty etc.)
- **Report by Activity, by Person:**
  - First option: selecting one or more Activities (using the control button), it lists all employees who have reported effort to the selected from the drop down menu activity(s) grouped by Activity name.
  - Second Option: uses the specified string to match all activities that contain it and lists all employees who have reported effort to the matching activities grouped by Activity name.
- **Reports in Excel Spreadsheets Format**: These are a collection of reports in Excel spreadsheet format. The reports contain a single excel spreadsheet listing the effort reported to an activity by employees and the corresponding chargeable task and the adjusted percentage to compensate for OPTO that will be reported to accounting (see ***Accounting Reports*** instructions for the calculations).