Effort Gap Reports

1. Note the following about the Effort Gap Reports

   • The Effort Gap Report shows the effort utilization and identifies any gaps in effort.

   • There are 3 formats available for this report – see next bullets - you may choose to run by any of the formats outlined below:
     - Individual Effort - outcome is funding for the individual for the current plus two fiscal years.
     - Principal Investigator’s Projects - outcome is a list of all the codes associated with the PI along with the individuals funded on each code. The bottom of the report contains a summary of all the individuals funded on the PI’s cost objects (WBS Elements and Cost Centers).
     - BFR code – outcome is a list of all employees associated with the BFR and the funding for each employee.

   • Based on the selection of the format above, the system determines the utilization based on the current effort in SAP and the end dates of the various sources of funding (for Projects, the end date is the Project End Date, for Cost Centers, there is no end date). The report also incorporates any changes made in the Projection Tool.
Effort Gap Report (cont.)

To execute and review the report:

2. Follow one of the paths via the Portal based on which version is to be executed (see Access the Projection and Reporting Tool section of the Guide):

   - **Grants Management → Projection and Reporting Tool → Effort Gap – Individual Effort Report**
     (outcome is funding for the individual for the current plus two fiscal years).
   
   - **Grants Management → Projection and Reporting Tool → Effort Gap – PI Projects Report**
     (outcome is a list of all the codes associated with the PI along with the individuals funded on each code. The bottom of the report contains a summary of all the individuals funded on the PI’s cost objects (WBS Elements and Cost Centers)).
   
   - **Grants Management → Projection and Reporting Tool → Effort Gap – BFR Report**
     (outcome is a list of all employees associated with the BFR and the funding for each employee).

3. If the **Effort Gap – Individual Effort Report** is selected, enter the **Principal Investigator’s or employee’s Duke Unique ID (DUID)** in the **Select Employee** field.

4. If the **Effort Gap – PI Projects Report** is selected, enter the **Principal Investigator’s Duke Unique ID (DUID)** in the **Select PI** field.
5. If the **Effort – BFR Report** is selected, enter the **10 digit BFR Code** in the **BFR Code** field.

6. After a selection is made from the steps above, click on the **Execute** to generate the report.
7. Review the data for the format chosen (by Individual Effort, by PI projects, or by BFR Code).

8. Review the **Effort Percentages** columns which display the projected effort levels out for the **current fiscal year plus 2 fiscal years** and note the following:
   - The Total line will be **highlighted in red when effort total drops below 100%**.
   - **Cost centers go out without end and WBS Element/Projects are based on the Project End Date in project master data.**
   - The **data also takes into account changes made in the Projection tool.**

9. Use the **Export to Excel** button to export the contents of the report to Excel (follow export options outlined the Report Functions section of this guide).