Detailed instructions with screen shots follow the short description. (page 3.)

- Go to the Banner Registration login page (<u>http://register.uah.edu</u>).
- Click on the Enter Secure Area link in the menu.
- In the field labeled **UserID**, enter your full A-number. The "User ID" field is case sensitive, so make sure you use an UPPERCASE "A" when typing your A-number.
- Enter your **PIN**. The first time you login, the PIN will default to the first initial of your fist name, first initial of your last name, and your 6 digit date of birth (MMDDYY.) For example, John Doe born on July 11, 1984 would type JD071184 into the "PIN" field. Follow the Self-Service instructions for changing your PIN.
- Click on the **Login** button with your mouse or press "Enter" on your keyboard.
- Click on the **Employee** Tab.
- Click on the **Effort Certification** Link. (If you have certified previously, you will also see a link for Effort Certification Archive. You may view your old certifications here.)
- Click on the **Review Certification** link.

There are 2 methods to view and certify your reports.

Method One for your personal certification: (Page 8 in the detailed instructions.)

- Click on **Certify My Effort**.
- Highlight the line and click the yellow file **Open** icon or double-click on the line. You may resize the columns to view the entire title of each org, grant, and fund.
- Click on **Pay Period Summary** to view the breakdown of the report by pay period.
- Click on the **Routing Queue.** You will see everyone with access to your report as a Pre-reviewer, Postreviewer, Certifier, and Alternate Certifier. The Alternate Certifier is the PI on any one of the accounts you charged. Pre-Reviewers and Post-Reviewers are account managers on any one of the accounts you have charged.

You may add an Alternate Certifier or Post-Reviewer by using the drop down boxes after clicking the **Add Member** tab. (*Page 12 in the detailed instructions*.)

- Click on **Comments** to add a comment that will be viewed by everyone in your routing queue. (Please be aware that auditors may also have access to your comments.)
- If the Effort Report does not reflect your actual effort, click on the **Request Changes** button on the Effort Report view. (*Page 19 in the detailed instructions*.) It will take you to an email page. Please use it to notify the Effort Reporting Officer and the person in your department responsible for originating Retros. (The Add Funding button is disabled. Only authorized departmental employees are allowed to enter corrections through the Retro system.)
- When you close your report using the blue **X Close** icon at the top of the screen, you will see that your report says "Changes Submitted" in the Unlocked/Locked column.
- If you change your mind or the corrections by Retro are completed, you may use the **Clear** button to access the report for additional review and certification.

Note: The Add New Funding button is disabled. Only authorized departmental employees are allowed to enter funding correction through the Retro system.

- Click on the **Certify** button. Then click on the **I Accept** button after reading the certification statement. The Routing Queue will show who certified and when. (*Page 25 of the detailed instructions.*)
- After you close the report using the blue **X Close** icon, you will see that the report is locked. You will not be able to unlock it to request additional changes. If you certified by accident, contact the Effort Reporting Officer for assistance.

<u>Method Two for PIs and Financial Managers</u>: --PIs are required to certify for their GRAs. (*Page 29 in the detailed instructions.*)

- Click on **Review or Certify Reports**.
- Click on the drop-down arrow on the Advanced Search tab.
- Click on the drop-down arrow on the Select Attribute tab.
- Click on Chart of Account Code. Enter H. The H must be capitalized.
- Select the Effort Period Code attribute using the drop down box (...) at the right of the field. These two selections will show you all the employees charging on accounts for which you are listed as a PI or Financial Manager for the selected certification period.

Note: You can also search by Last Name, First Name, ID, COA, Status and State. You must provide at least two characters of the First Name, Last Name, or ID. You can use an asterisk (*) as a wild card with any listed attribute.

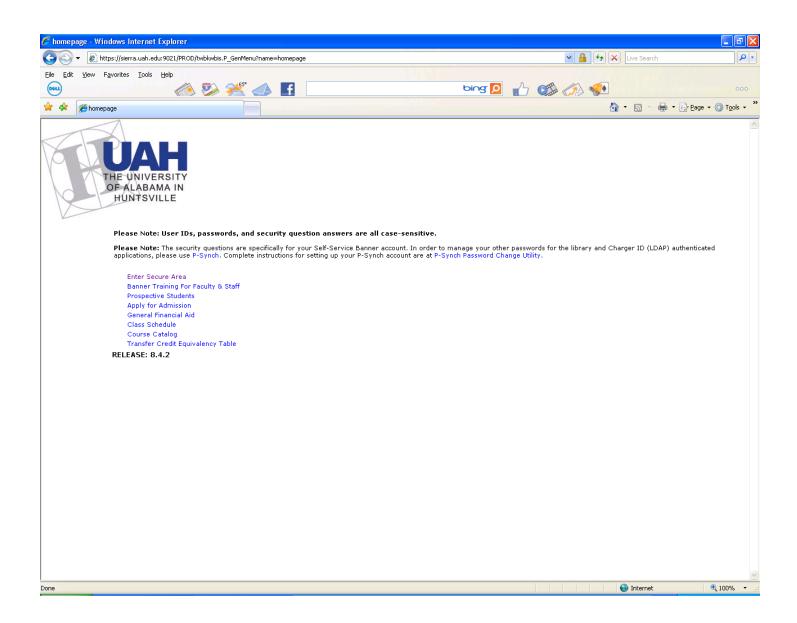
Use the **Clear** button at the bottom of the attributes area to remove all your selected search criteria attributes.

Use the **X** icon at the right of the attribute field to remove individual attributes.

- Use the **Close** button at the bottom of the attributes area to close the attribute window.
- Click on the **Go** button or press Enter on your keyboard.
- Click the directional arrow on any column header to reorder lowest to highest or highest to lowest value.
- Highlight the line of the report you wish to review, and click the **Open** icon or double-click the line of the effort report.
- The remaining instructions are the same as in Method One (*Page 9 in the detailed instructions.*)

Detailed instructions with screen shots

- Go to the Banner Registration login page (http://register.uah.edu).
- Click on the Enter Secure Area link in the menu.



- In the field labeled **User ID**, enter your full A-number. The "User ID" field is case sensitive, so make sure you use an UPPERCASE 'A' when typing your A-number.
- Enter your **PIN**. The first time you login, the PIN will default to the first initial of your first name, first initial of your last name, and your 6 digit date of birth (MMDDYY.) For example, John Doe born on July 11, 1984 would be JD071184. Follow the screen instructions for setting up your own PIN.

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Contact Charger Central at 256-824-7777, if you need assistance with your log in.		
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• Click on the Login button with your mouse or press "Enter" on your keyboard.

Your Menu will reflect the access you have in Self-Service.

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• Click on the **Employee** Tab.

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• Click on the **Effort Certification** Link. (If you have certified previously, you will also see a link for Effort Certification Archive. You may view your old certifications on the Effort Certification Archive link.)

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There are 2 methods to view and certify your report.

Method One is for your personal certification:

- Click on **Certify My Effort**.
- Highlight the report line (highlighted in blue on this page) and click the yellow folder **Open** icon at the top of the page, or double-click on the report line.

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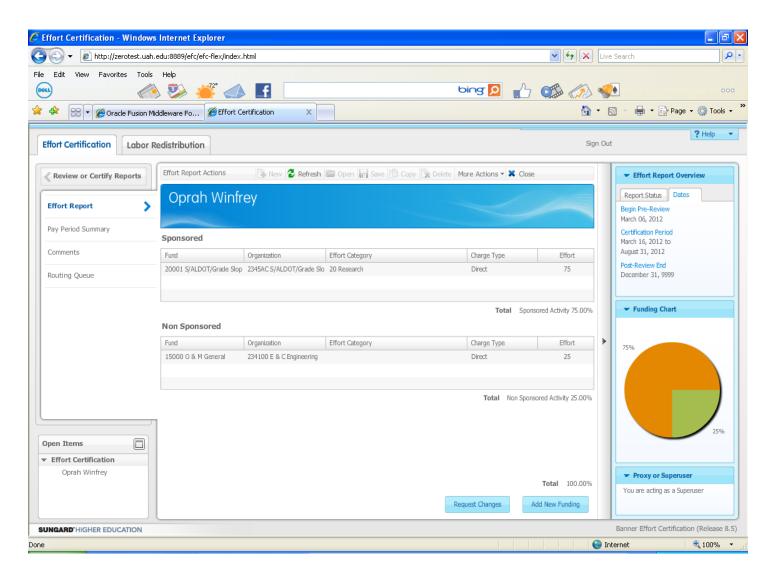
You will see the certification page.

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Comments	Fund	Organization	Effort Category	Charge Type	Effort	
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Oprah Winfrey					Total 100.00%	You are acting as a Superuser
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(You may resize the columns to view the entire title of each org, grant, and fund.)

Notice the information in the upper right block. It gives you the code for the report (20120110), the full name of the report (Training 2012 pay 1 to 10), the dates covered in the report (Mar 16, 2012 – Aug 21, 2012), and the status (Awaiting Certification – Unlocked.)

• Click on the **Dates** Tab in the upper right block.



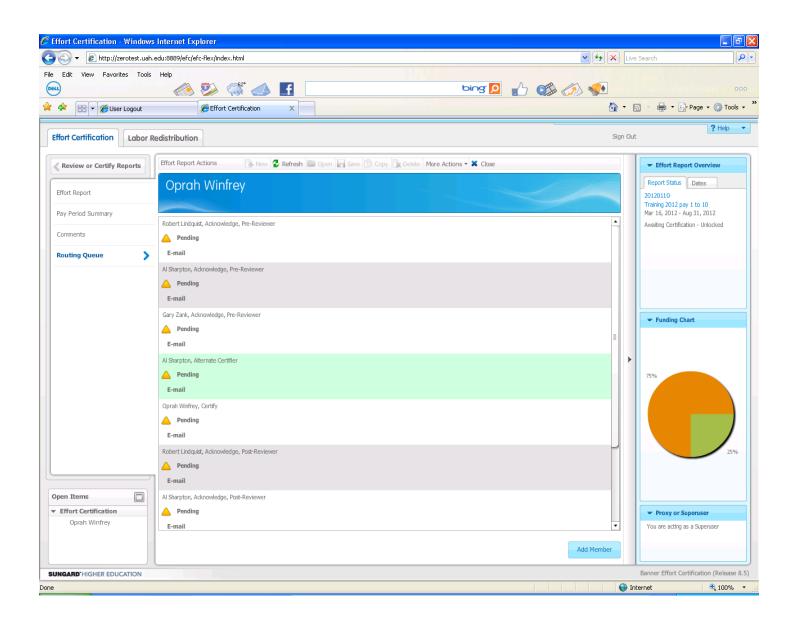
Notice the information. There is a date for Begin Pre-Review, which allows review of the report before the certification period begins. There are also the dates for the certification period, and the Post-Review End date. In this case, it shows that you will be able to review the report until the year 9999.

• Click on **Pay Period Summary** in the left column to view the breakdown of the report by pay period. You may resize the columns to view the entire title of each org, grant, and fund by moving your cursor between the column headers.

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Notice there are only two pay periods for this report, because Oprah only worked two pay periods during the certification period. However, the report is still for 100% effort. This is to comply with OMB regulations. The distribution in the Effort Period Percent column shows how the distribution in the Payroll Percent column affects the total certification as represented in the Funding Chart.

• Click on the **Routing Queue.** You will see everyone with access to your report as a Pre-Reviewer, Post-Reviewer, Certifier and Alternate Certifier. The Alternate Certifier is the PI on any one of the accounts you have charged.

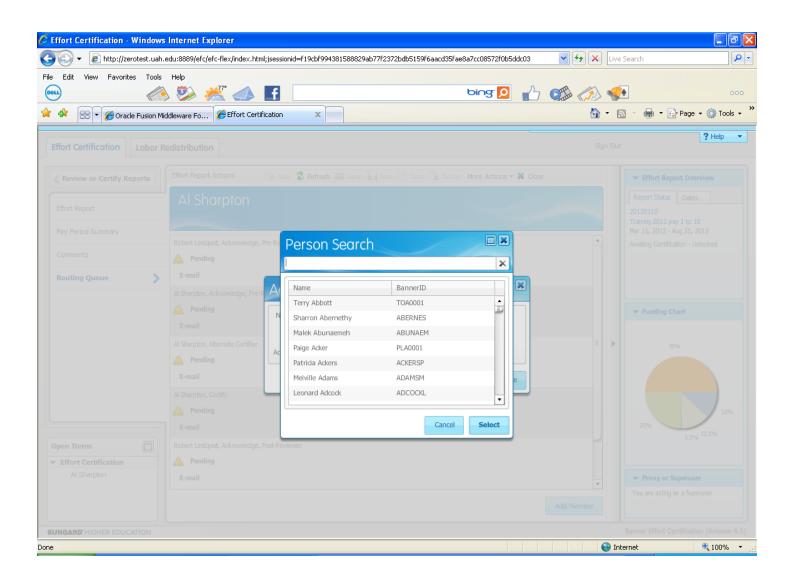


The Routing Queue of Oprah Winfrey shows Pre-reviewers and Post-reviewers of everyone with oversight of any account that Oprah charges. Also, the Alternate Certifier is the PI on Oprah's Research account.

• You may add an Alternate Certifier or Post-Reviewer by using the drop down boxes after clicking the **Add Member** tab at the bottom right of the routing queue. (Pre-Reviewers and Post-Reviewers are account managers on one of the accounts charged.)

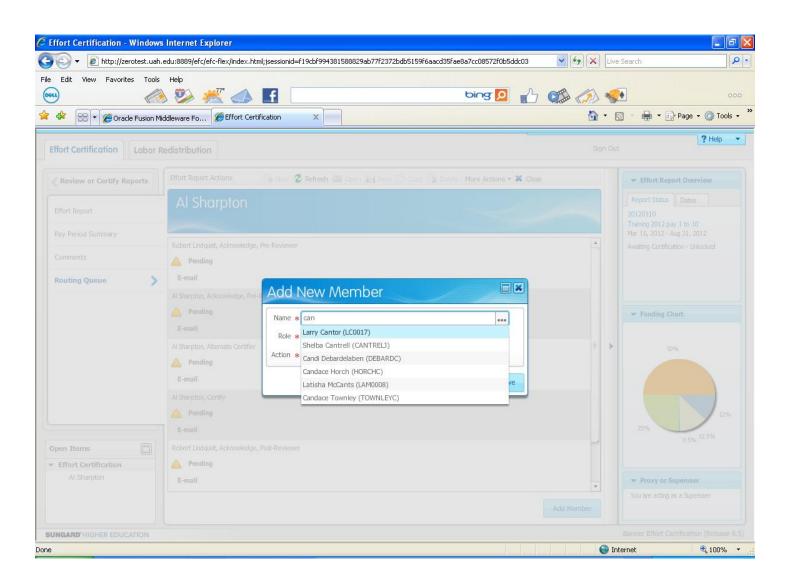
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• Add a member using the person search feature represented by the (...) at the end of the name box.



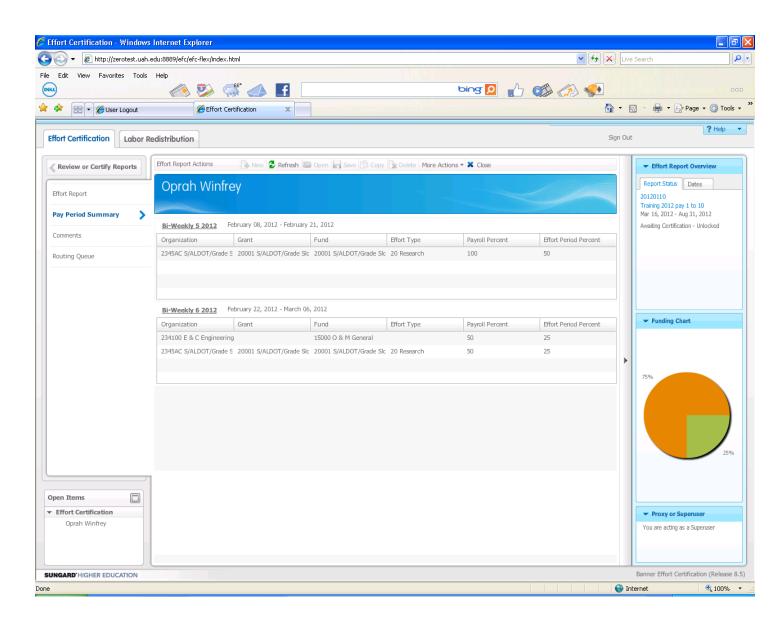
• Scroll through the names and click the **Select** button to make your choice.

• You may also select a name by beginning to type a name in the name box. The program will try to anticipate your choice.



• Click the **Save** button to complete your selections.

• Click on **Comments** in the left column to add a comment that will be viewed by everyone in your routing queue.



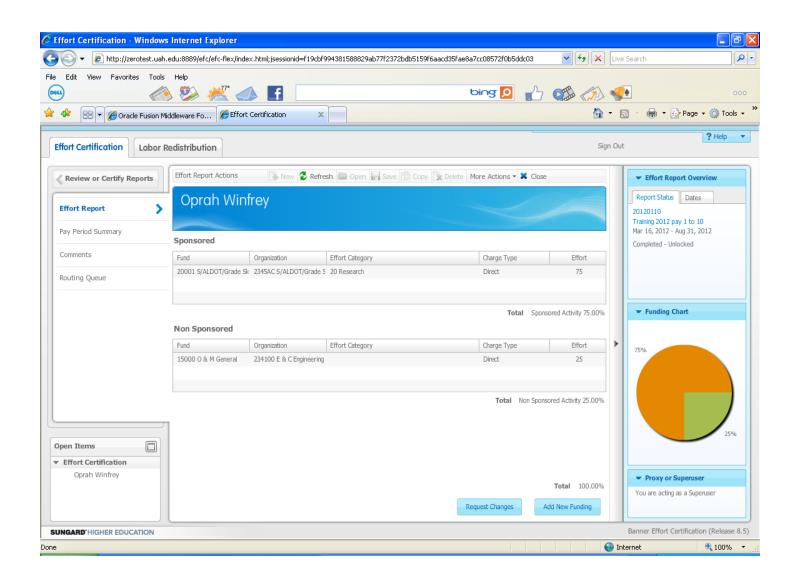
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• Click on the **Add Comment** button in the lower right section of your screen.

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• (Please be aware that auditors may also have access to your comments.) You may click on the **Save** button to register your comment or the **Cancel** button to erase it.

• If the Effort Report does not reflect your actual effort, click on the **Request Changes** button on the Effort Report view. It will take you to an email page.



• Please use the email page to notify the Effort Reporting Officer and the person in your department responsible for originating Retros that your effort does not reasonably reflect your actual effort. Also, clicking on the **Send** button will change the status of your report.

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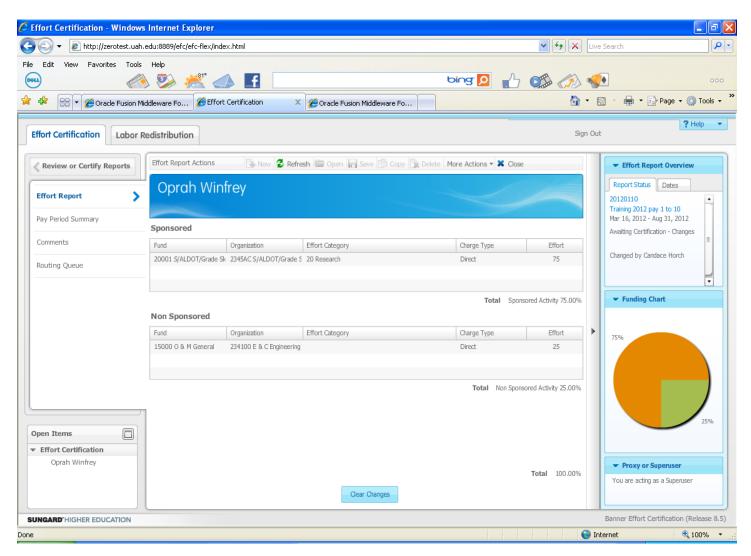
The status of your report will be automatically updated to Changes Submitted as shown in the Report Status box in the upper right corner of the report.

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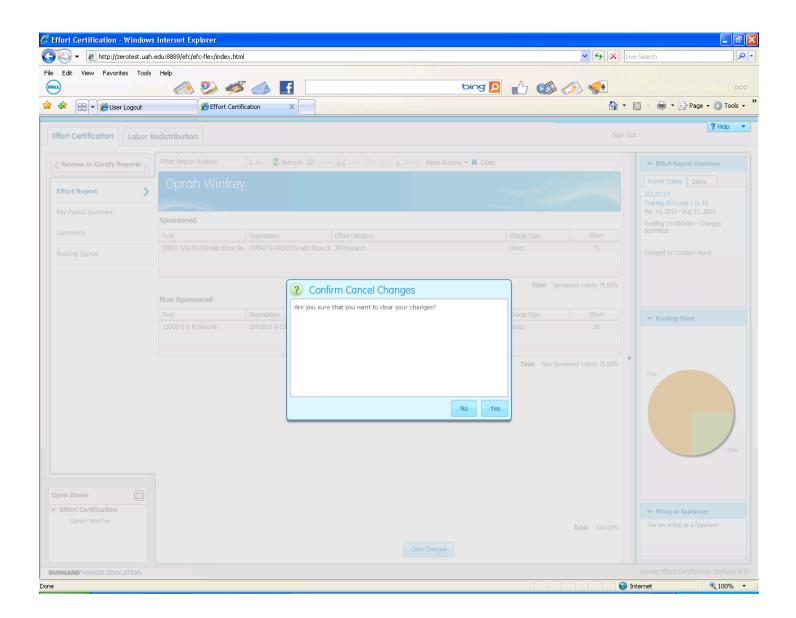
• When you close your report using the blue **X Close** icon at the top of the screen next to the More Actions button, you will see that your report says "Changes Submitted" in the Unlocked/Locked column.

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• If you change your mind or the corrections by Retro are completed, you may use the **Clear Changes** button to access the report for additional review and certification.



• Click the **Yes** button to cancel the changes.



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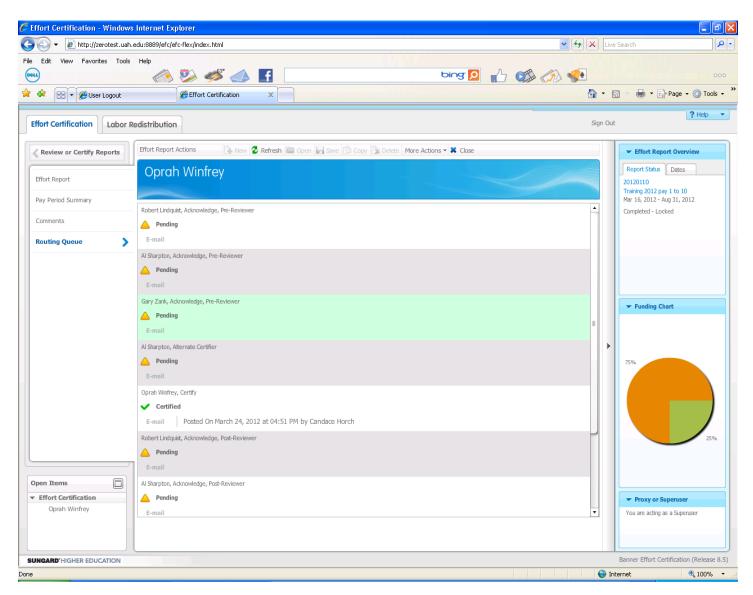
Note: The Add New Funding button is disabled. Only authorized department employees are allowed to enter funding corrections through the Retro system.

• Click on the **Certify** button to complete your certification.

• Then click on the I Agree button after reading the certification statement.

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• The Routing Queue will show who certified and when.

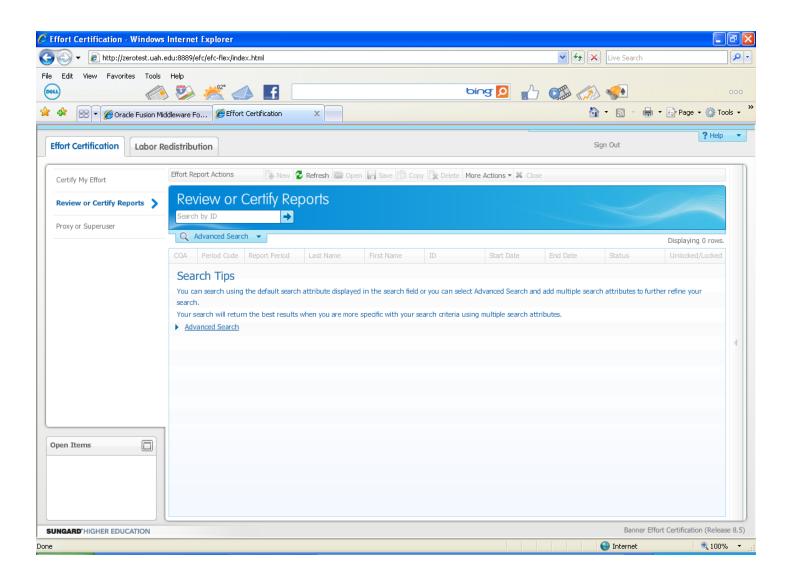


• After you close the report using the blue **X Close** Icon, you will see that the report is locked. You will not be able to unlock it to request additional changes. If you certified by accident, contact the Effort Reporting Officer for assistance. However, you may access the information for review at any time.

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Method Two for PIs and Financial Managers: (PIs are required to certify for their GRAs.)

- Click on **Review or Certify Reports.**
- Click on the drop-down arrow on the Advanced Search tab.



• Click on the drop-down arrow on the Select Attribute tab.

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• Click on **Chart of Account Code** field.

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Search Tips You can search using the default search attribute displayed in the search field or you can select Advanced Search and search. Your search will return the best results when you are more specific with your search criteria using multiple search attribute displayed in the search attribute displayed in the search field or you can select Advanced Search and search. Your search will return the best results when you are more specific with your search criteria using multiple search attribute displayed in the search attribute displayed in the search field or you can select Advanced Search and search. Your search will return the best results when you are more specific with your search criteria using multiple search attribute displayed in the sear		attributes to fur	ther refine your
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• Enter H in the Chart of Account Code field. The H must be capitalized.

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• Select the Effort Period Code attribute.

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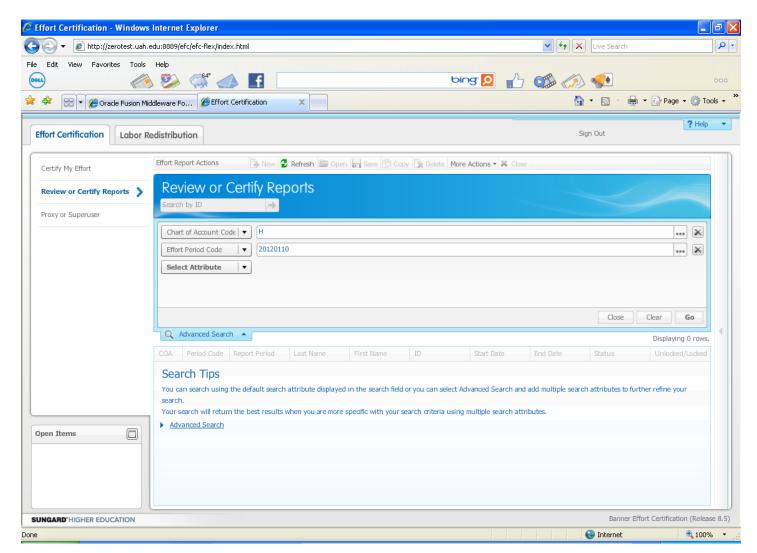
- Select the Effort Period code using the drop down box (...) on the right of the field.
- These two selections will show you all the employees charging on accounts for which you are listed as a PI or Financial Manager for the selected certification period.
 Note: You can search by Last Name, First Name, ID, COA, Status, and State. You must provide at least two characters of the First Name, Last Name, or ID. You can use an asterisk (*) as a wild card with any listed attribute.

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Use the **Clear** button at the bottom of the Attribute area to remove all your selected search criteria attributes.

Use the **X** icon at the right of the attribute field to remove individual attributes.

Use the **Close** button at the bottom of the Attribute area to close the attribute window.



• Click on the **Go** button or press Enter on your keyboard.

- Click the directional arrow on any column header to reorder from the lowest to highest or highest to lowest value.
- Highlight the line of the report you wish to review.

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• Click the yellow folder **Open** icon or double-click the line of the effort report.

The remaining instructions are the same as in Method One beginning on page 9.

Please contact the Effort Reporting Officer for additional information.

Candace Horch MDH 221 256-824-2242 horchc@uah.edu