

## How to Login and Certify Your Effort Report

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

- 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 **Charger ID**, enter your Charger ID.
- Enter your **Charger Password**. If you need assistance with your login, click on the link, [Click Here for Help with Login?](#) Or got to <https://apps.uah.edu/PasswordReset/>.
- 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 9 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, Post-reviewer, 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 13 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 20 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 26 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.

**Method Two for PIs and Financial Managers:** --PIs are required to certify for their GRAs. *(Page 30 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.

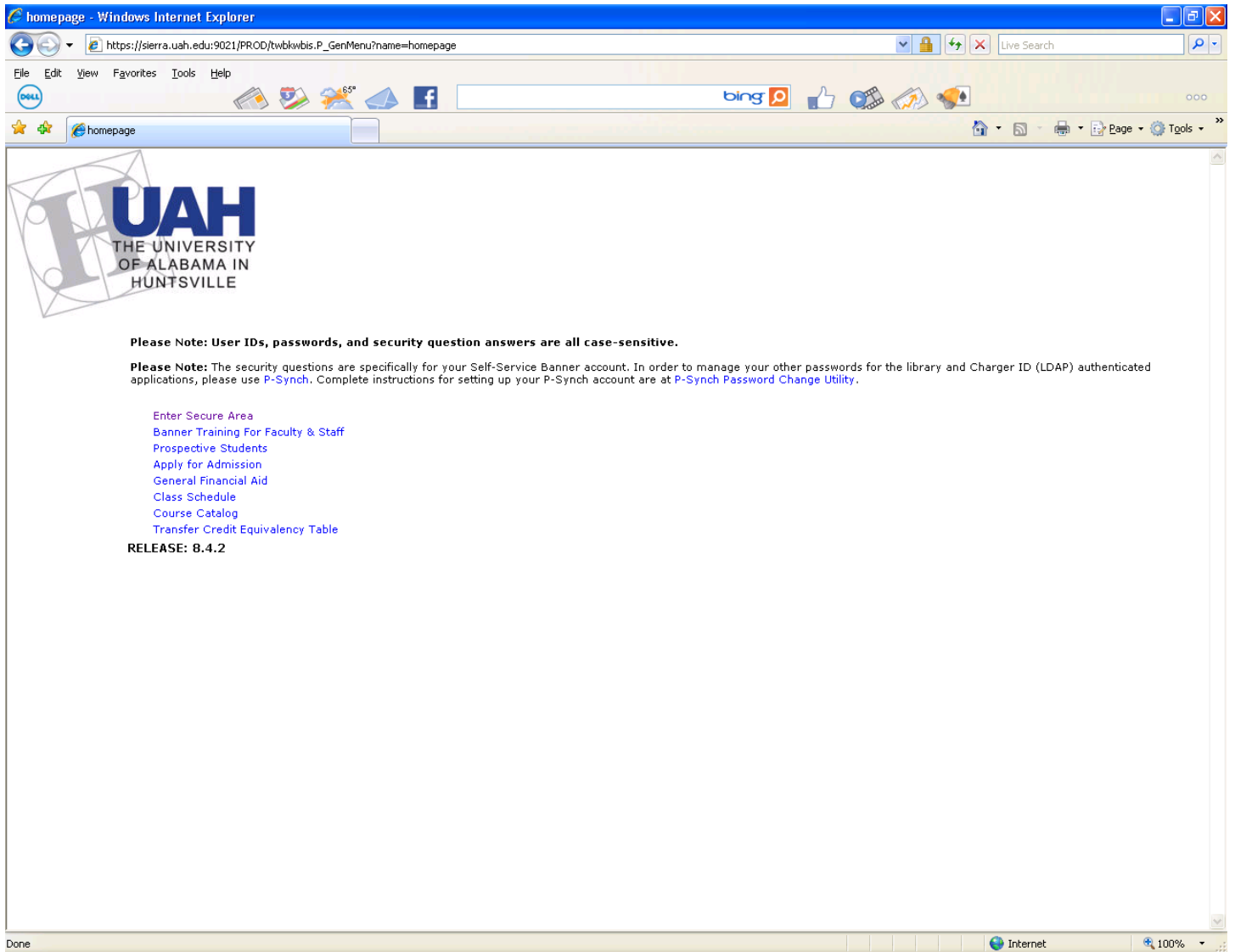
Use the **X** icon at the right of the attribute field to remove individual attributes.

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

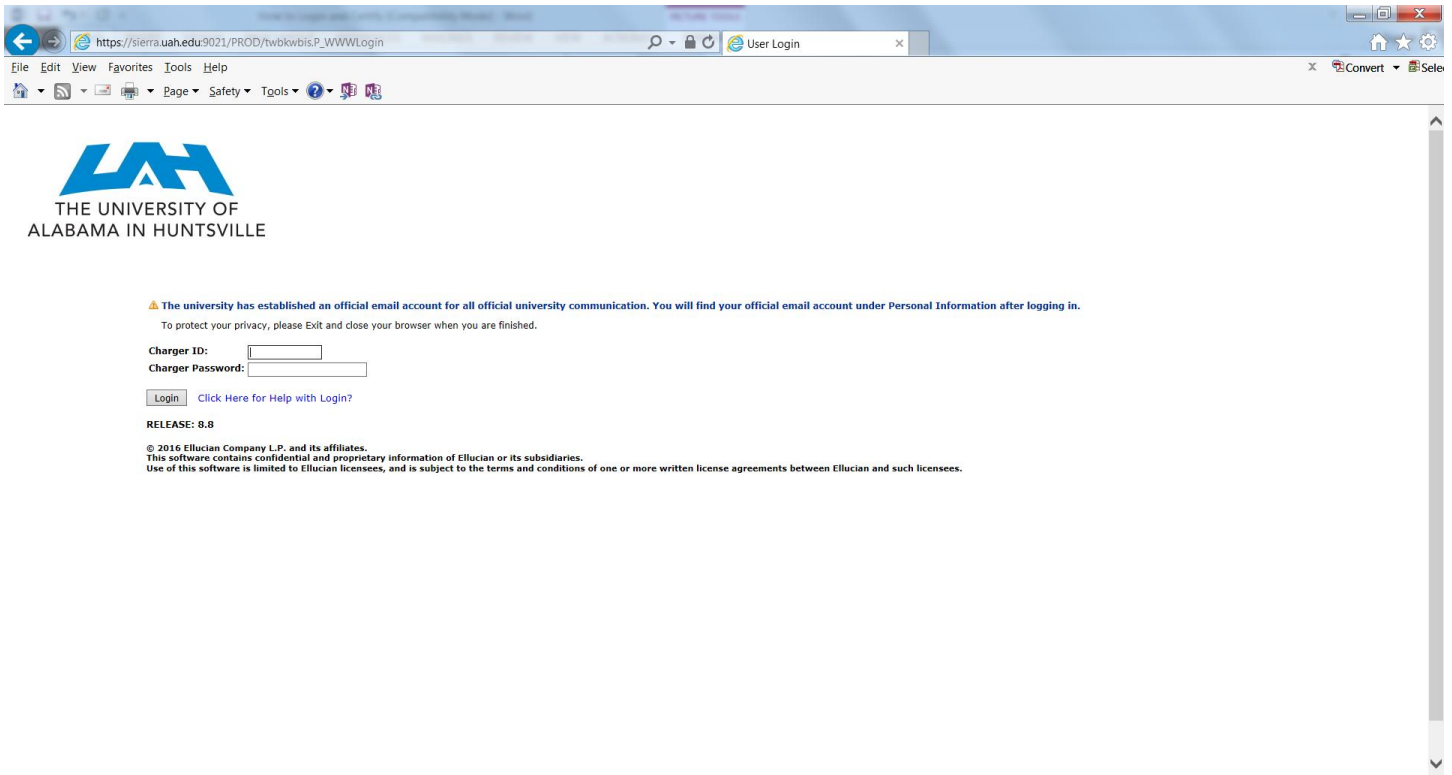
- Click on the **Go** button or press Enter on your keyboard.
- Click the directional arrow on any column header to reorder lowest to highest or highest to lowest value.
- Highlight the line of the report you wish to review, and click the **Open** icon or double-click the line of the effort report.
- 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.

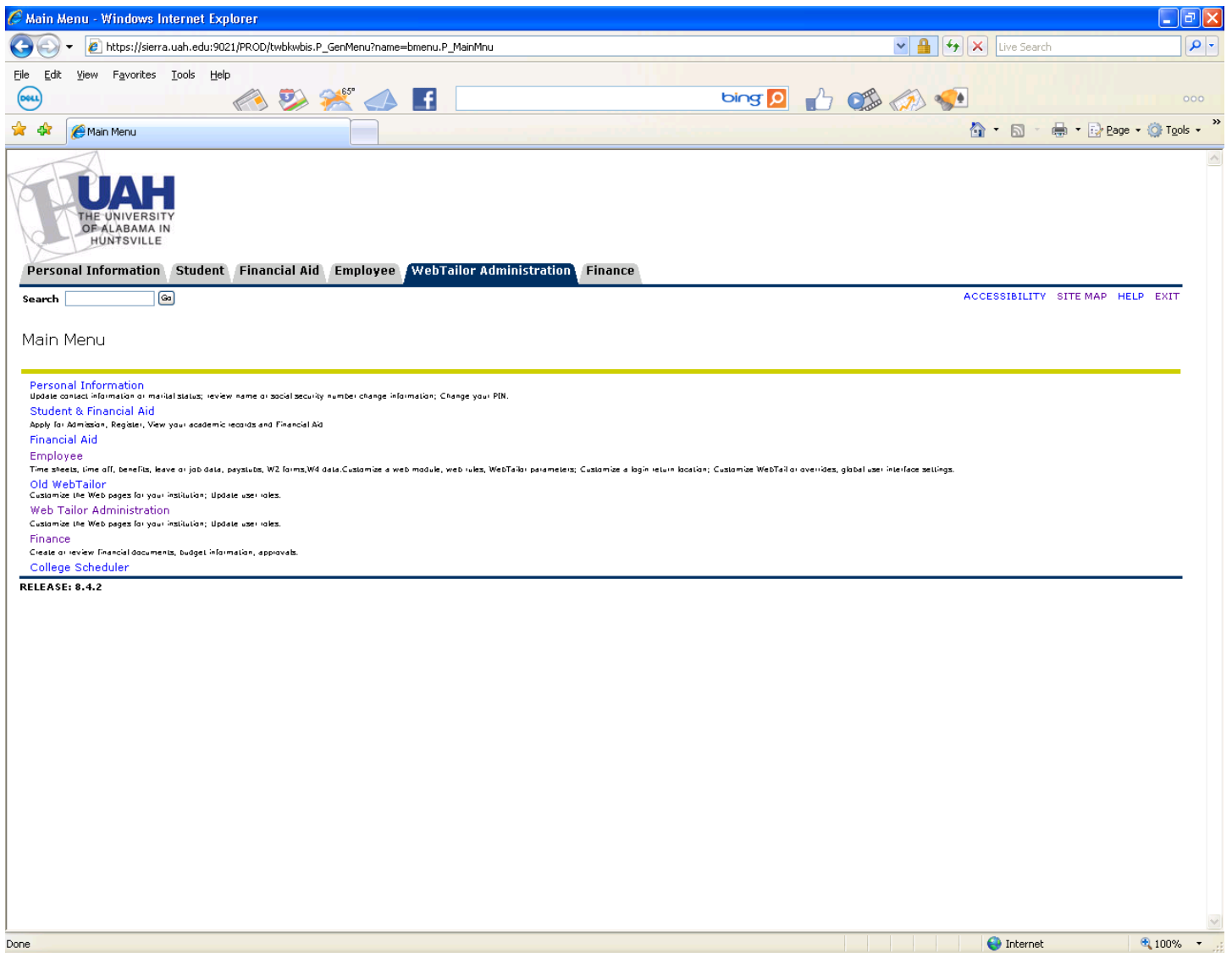


- In the field labeled **Charger ID**, enter your Charger ID.
- Enter your **Charger Password**. If you need assistance with your Login, click on the link, [Click Here for Help with Login?](#) Or go to <https://apps.uah.edu/PasswordReset/>.

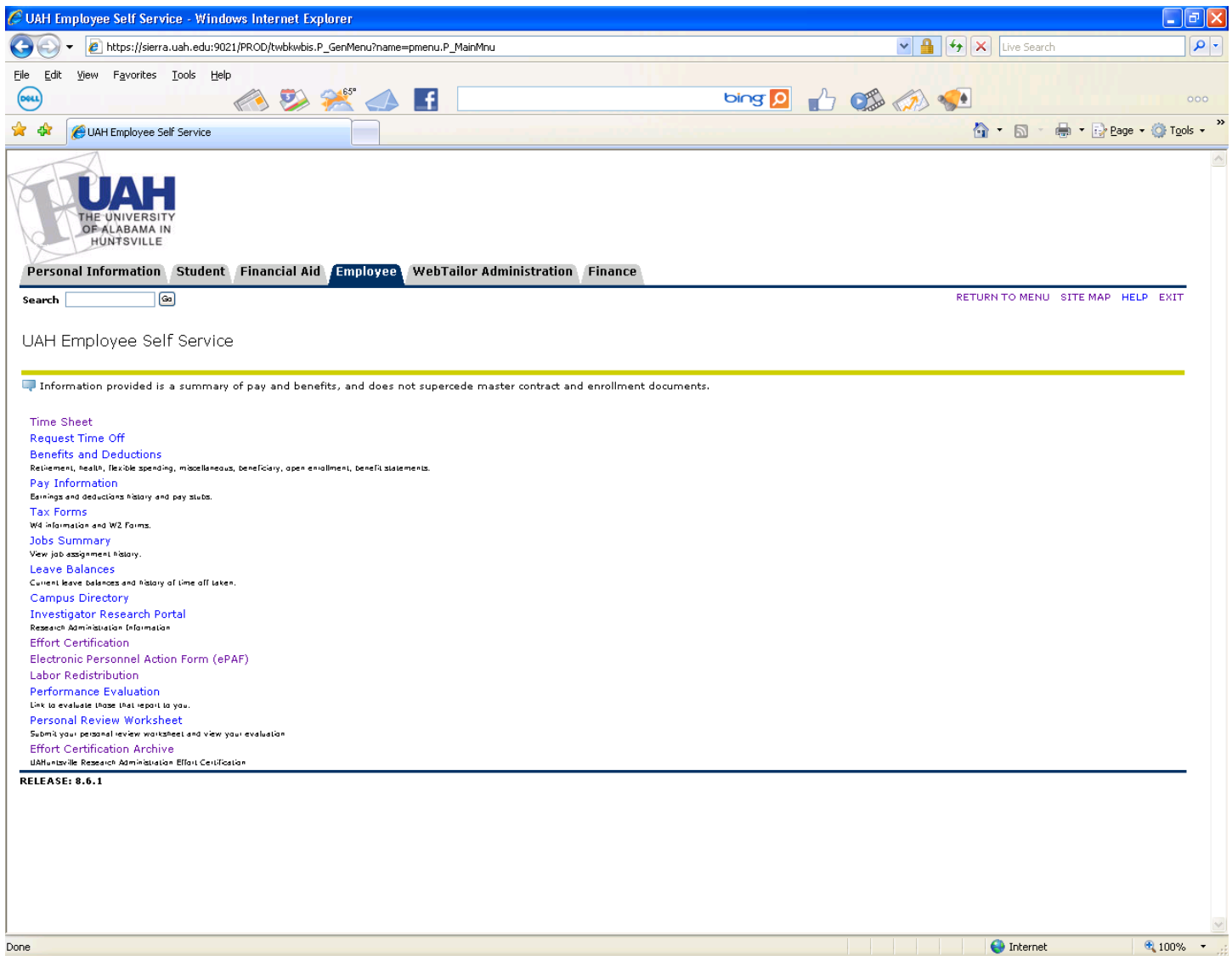


- Click on the **Login** button with your mouse or press “Enter” on your keyboard.

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



- 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 on the Effort Certification Archive link.)

If you see this extra log-in screen, click on the back arrow in the top left of the screen until the effort reporting screen appears.

Effort Certification - Windows Internet Explorer

http://zero.uah.edu:8889/efc/efc-flex/index.jsp;jsessionid=e0ff6d3874991975ceaae69456cd494d79f49310f423b3624a7de6739faace10?login\_error=

File Edit View Favorites Tools Help

Oracle Fusion Middleware Fo... Effort Certification

90°

bing

Live Search

Page Tools

### Welcome

Sign in to Banner Effort Certification

Please enter your User Name and Password.

Your sign in attempt was not successful, try again.

User Name:

Password:

Remember User Name?

**Sign In**

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Banner Effort Certification (Release 8.5)

Done Internet 100%

Effort Certification - Windows Internet Explorer

http://zero.uah.edu:8889/efc/efc-flex/index.html

File Edit View Favorites Tools Help

66°

bing

Effort Certification

Sign Out ? Help

**Effort Certification** Labor Redistribution

**Certify My Effort**

Effort Report Actions New Refresh Open Save Copy Delete More Actions Close

Review or Certify Reports

Proxy or Superuser

Open Items

COA	Period Code	Report Period	Start Date	End Date	Status	Unlocked/Locked

SUNGARD HIGHER EDUCATION Banner Effort Certification (Release 8.5)

Done Internet 100%



**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.

Effort Certification - Windows Internet Explorer

http://zerotest.uah.edu:8089/efc/efc-flex/index.html

File Edit View Favorites Tools Help

Effort Certification Labor Redistribution Sign Out ? Help

Certify My Effort

Review or Certify Reports

Search by ID

Search Descriptions: ID = a25167750

Advanced Search

Displaying 1 row.

COA	Period Code	Report Period	Last Name	First Name	ID	Start Date	End Date	Status	Unlocked/Locked
H	20120110	Training 2012 pay 1	Winfrey	Oprah	A25167750	March 16, 2012	August 31, 2012	Awaiting Certificatio	Unlocked

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Banner Effort Certification (Release 8.5)

Done Internet 100%

You will see the certification page.

**Effort Certification - Windows Internet Explorer**  
http://zerotest.uah.edu:8889/efc/efc-flex/index.html

**Effort Certification** | Labor Redistribution | Sign Out | ? Help

**Review or Certify Reports** | Effort Report Actions: New, Refresh, Open, Save, Copy, Delete, More Actions, Close

**Effort Report** | Oprah Winfrey

Pay Period Summary  
Comments  
Routing Queue

**Sponsored**

Fund	Organization	Effort Category	Charge Type	Effort
20001 S/ALDOT/Grade Slope Stur	2345AC S/ALDOT/Grade Slope St	20 Research	Direct	75

**Total** Sponsored Activity 75.00%

**Non Sponsored**

Fund	Organization	Effort Category	Charge Type	Effort
15000 O & M General	234100 E & C Engineering		Direct	25

**Total** Non Sponsored Activity 25.00%

**Total** 100.00%

[Request Changes](#) | [Certify](#) | [Add New Funding](#)

**Effort Report Overview**  
Report Status: 20120110  
Dates: Training 2012 pay 1 to 10  
Mar 16, 2012 - Aug 31, 2012  
Awaiting Certification - Unlocked

**Funding Chart**  
75% (Sponsored) | 25% (Non-Sponsored)

**Proxy or Superuser**  
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.

The screenshot displays the Banner Effort Certification application in a Windows Internet Explorer browser. The main content area shows an effort report for 'Oprah Winfrey'. It is divided into two sections: 'Sponsored' and 'Non-Sponsored' activities.

Fund	Organization	Effort Category	Charge Type	Effort
20001 S/ALDOT/Grade Slop	Z345AC S/ALDOT/Grade Slo	20 Research	Direct	75
<b>Total</b> Sponsored Activity 75.00%				
Fund	Organization	Effort Category	Charge Type	Effort
15000 O & M General	234100 E & C Engineering		Direct	25
<b>Total</b> Non Sponsored Activity 25.00%				
				<b>Total</b> 100.00%

The right-hand sidebar contains an 'Effort Report Overview' section with a 'Dates' tab. The dates listed are:

- Begin Pre-Review: March 06, 2012
- Certification Period: March 16, 2012 to August 31, 2012
- Post-Review End: December 31, 9999

Below the dates is a 'Funding Chart' pie chart showing 75% (orange) and 25% (green). At the bottom of the sidebar, it indicates 'Proxy or Superuser' status: 'You are acting as a Superuser'.

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.

**Effort Report Overview**

Report Status: Report Status | Dates: Dates

20120110  
 Training 2012 pay 1 to 10  
 Mar 16, 2012 - Aug 31, 2012  
 Awaiting Certification - Unlocked

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**Effort Report**

**Oprah Winfrey**

**Bi-Weekly 5 2012** February 08, 2012 - February 21, 2012

Organization	Grant	Fund	Effort Type	Payroll Percent	Effort Period Percent
2345AC S/ALDOT/Grade S	20001 S/ALDOT/Grade Slc	20001 S/ALDOT/Grade Slc	20 Research	100	50

**Bi-Weekly 6 2012** February 22, 2012 - March 06, 2012

Organization	Grant	Fund	Effort Type	Payroll Percent	Effort Period Percent
234100 E & C Engineering		15000 O & M General		50	25
2345AC S/ALDOT/Grade S	20001 S/ALDOT/Grade Slc	20001 S/ALDOT/Grade Slc	20 Research	50	25

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**Funding Chart**

75% | 25%

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**Proxy or Superuser**

You are acting as a Superuser

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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 screenshot displays the Effort Certification web application interface. The main content area shows the 'Routing Queue' for the report 'Oprah Winfrey'. The queue lists the following users and their roles:

- Robert Lindquist, Acknowledge, Pre-Reviewer (Pending, E-mail)
- Al Sharpton, Acknowledge, Pre-Reviewer (Pending, E-mail)
- Gary Zank, Acknowledge, Pre-Reviewer (Pending, E-mail)
- Al Sharpton, Alternate Certifier (Pending, E-mail) - This entry is highlighted in green.
- Oprah Winfrey, Certify (Pending, E-mail)
- Robert Lindquist, Acknowledge, Post-Reviewer (Pending, E-mail)
- Al Sharpton, Acknowledge, Post-Reviewer (Pending, E-mail)

On the right side, the 'Effort Report Overview' shows the report status as 'Awaiting Certification - Unlocked' for the period 'Mar 16, 2012 - Aug 31, 2012'. Below this is a 'Funding Chart' with a pie chart showing 75% (orange) and 25% (green). At the bottom right, a 'Proxy or Superuser' notification states 'You are acting as a Superuser'. An 'Add Member' button is located at the bottom right of the routing queue.

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.)

Effort Certification - Windows Internet Explorer

http://zerotest.uah.edu:8889/efc/efc-flex/index.html

File Edit View Favorites Tools Help

bing

User Logout Effort Certification

Sign Out ? Help

Effort Certification Labor Redistribution

Review or Certify Reports

Effort Report Actions New Refresh Open Save Copy Delete More Actions Close

Oprah Winfrey

Robert Lindquist, Acknowledge, Pre-Reviewer  
 Pending  
 E-mail

Al Sharpton, Acknowledge, Pre-Reviewer  
 Pending  
 E-mail

Gary Zank, Acknowledge, Pre-Reviewer  
 Pending  
 E-mail

Al Sharpton, Alternate Certifier  
 Pending  
 E-mail

Oprah Winfrey, Certify  
 Pending  
 E-mail

Robert Lindquist, Acknowledge, Post-Reviewer  
 Pending  
 E-mail

Al Sharpton, Acknowledge, Post-Reviewer  
 Pending  
 E-mail

Open Items

- Effort Certification
  - Oprah Winfrey

**Add New Member**

Name \*

Role \* Alternate Certifier

Action \* Certify

Cancel Save

Effort Report Overview

Report Status Dates

20120110  
 Training 2012 pay 1 to 10  
 Mar 16, 2012 - Aug 31, 2012  
 Awaiting Certification - Unlocked

Funding Chart

75% 25%

Proxy or Superuser

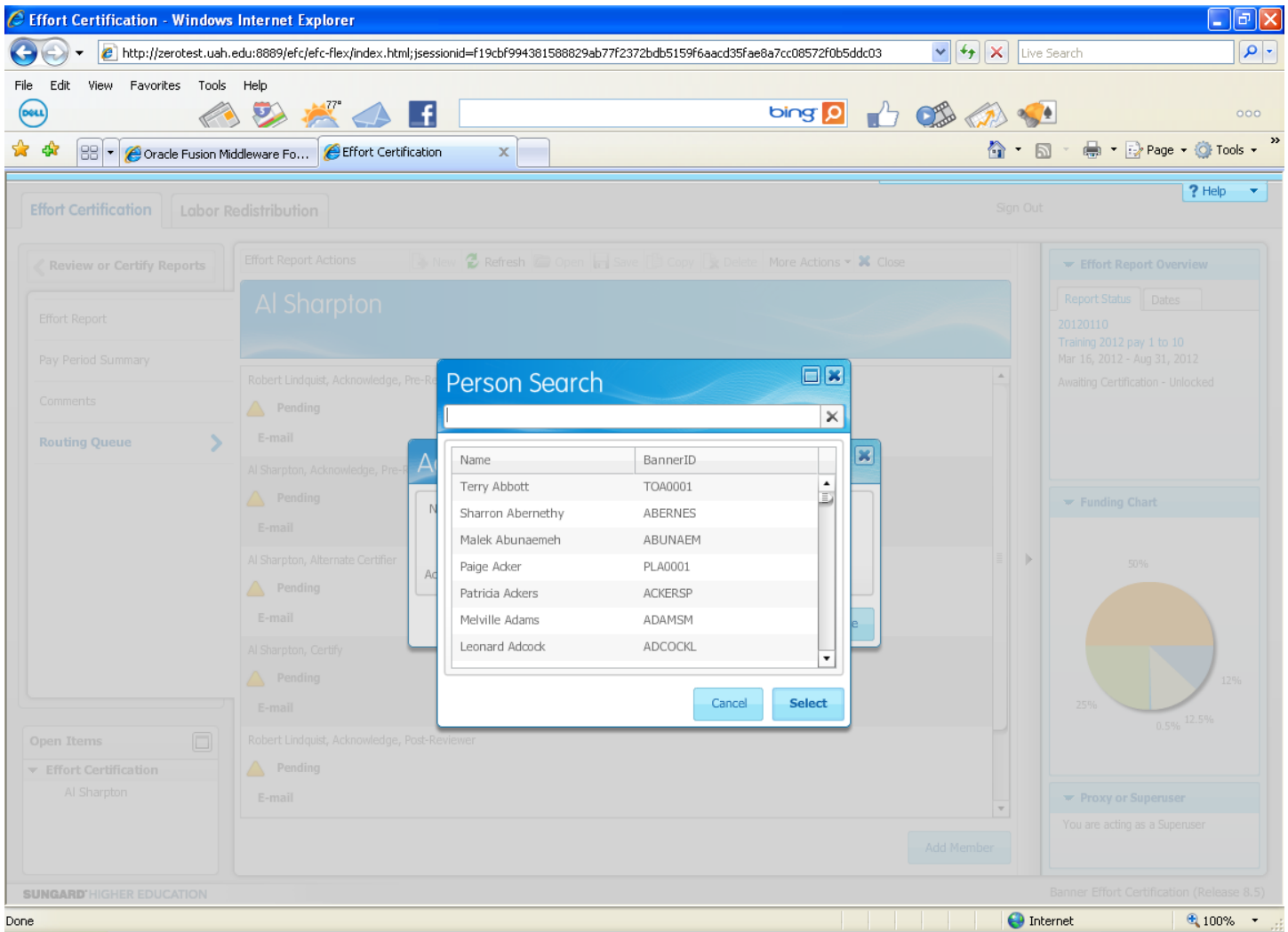
You are acting as a Superuser

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Banner Effort Certification (Release 8.5)

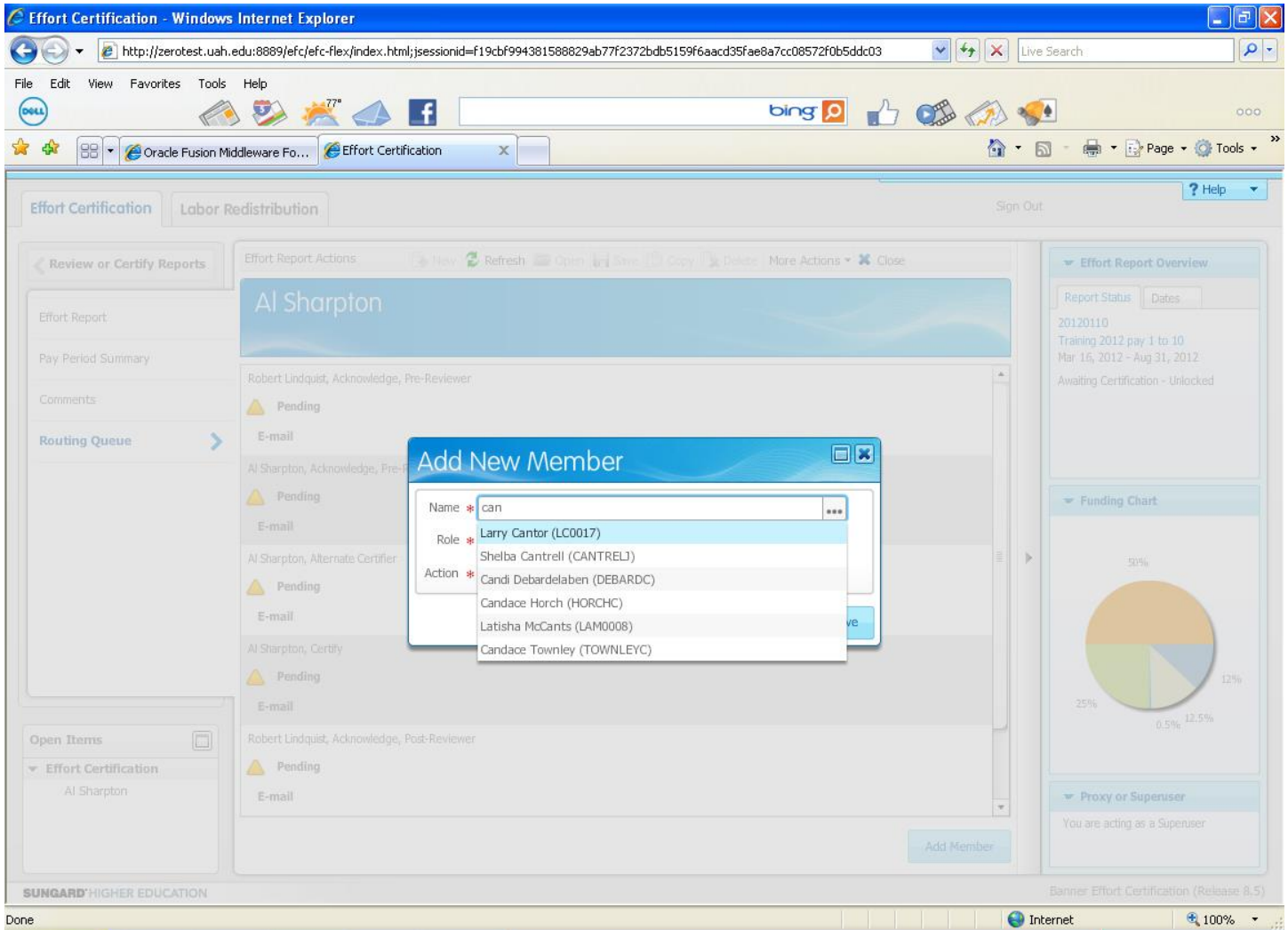
Done Internet 100%

- 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.

Effort Certification - Windows Internet Explorer

http://zerotest.uah.edu:8889/efc/efc-flex/index.html

File Edit View Favorites Tools Help

User Logout Effort Certification

Sign Out ? Help

Review or Certify Reports

Effort Report

Pay Period Summary

Comments

Routing Queue

Open Items

Effort Certification

Oprah Winfrey

Effort Report Actions New Refresh Open Save Copy Delete More Actions Close

Oprah Winfrey

Bi-Weekly 5 2012 February 08, 2012 - February 21, 2012

Organization	Grant	Fund	Effort Type	Payroll Percent	Effort Period Percent
2345AC S/ALDOT/Grade S	20001 S/ALDOT/Grade Slc	20001 S/ALDOT/Grade Slc	20 Research	100	50

Bi-Weekly 6 2012 February 22, 2012 - March 06, 2012

Organization	Grant	Fund	Effort Type	Payroll Percent	Effort Period Percent
234100 E & C Engineering		15000 O & M General		50	25
2345AC S/ALDOT/Grade S	20001 S/ALDOT/Grade Slc	20001 S/ALDOT/Grade Slc	20 Research	50	25

Effort Report Overview

Report Status Dates

20120110

Training 2012 pay 1 to 10

Mar 16, 2012 - Aug 31, 2012

Awaiting Certification - Unlocked

Funding Chart

75%

25%

Proxy or Superuser

You are acting as a Superuser

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Banner Effort Certification (Release 8.5)

Done Internet 100%

Effort Certification - Windows Internet Explorer

http://zerotest.uah.edu:8889/efc/efc-flex/index.html

File Edit View Favorites Tools Help

Oracle Fusion Middleware Fo... Effort Certification UAH Employee Self Service

Sign Out Help

Review or Certify Reports

Effort Report Actions New Refresh Open Save Copy Delete More Actions Close

Oprah Winfrey

Candace Horch

Test

Posted On Mar 25, 2012 4:03 PM

Add Comment

Effort Report Overview

Report Status Dates

20120110

Training 2012 pay 1 to 10

Mar 16, 2012 - Aug 31, 2012

Completed - Unlocked

Funding Chart

75%

25%

Proxy or Superuser

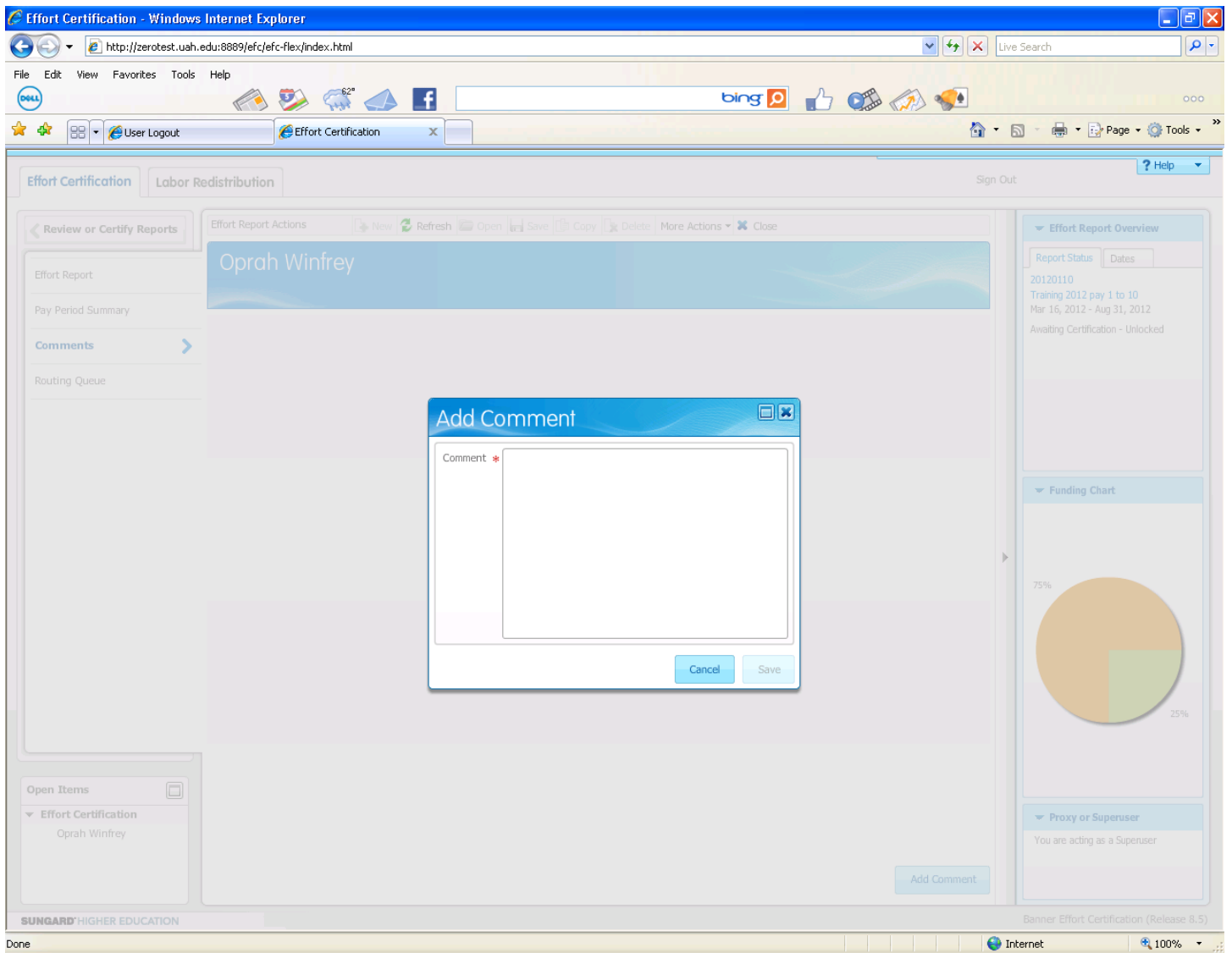
You are acting as a Superuser

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Banner Effort Certification (Release 8.5)

Done Internet 100%

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



- (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.

The screenshot displays the 'Effort Certification' application interface. The main content area shows an effort report for 'Oprah Winfrey'. The report is divided into 'Sponsored' and 'Non Sponsored' sections, each with a table of activities. A pie chart on the right shows the distribution of activity: 75% Sponsored and 25% Non Sponsored. At the bottom of the report, there are two buttons: 'Request Changes' and 'Add New Funding'.

Fund	Organization	Effort Category	Charge Type	Effort
20001 S/ALDOT/Grade Sk	2345AC S/ALDOT/Grade S	20 Research	Direct	75
<b>Total</b> Sponsored Activity 75.00%				
Fund	Organization	Effort Category	Charge Type	Effort
15000 O & M General	234100 E & C Engineering		Direct	25
<b>Total</b> Non Sponsored Activity 25.00%				
<b>Total</b> 100.00%				

**Effort Report Overview**

Report Status: 20120110  
 Dates: Training 2012 pay 1 to 10  
 Mar 16, 2012 - Aug 31, 2012  
 Completed - Unlocked

**Funding Chart**

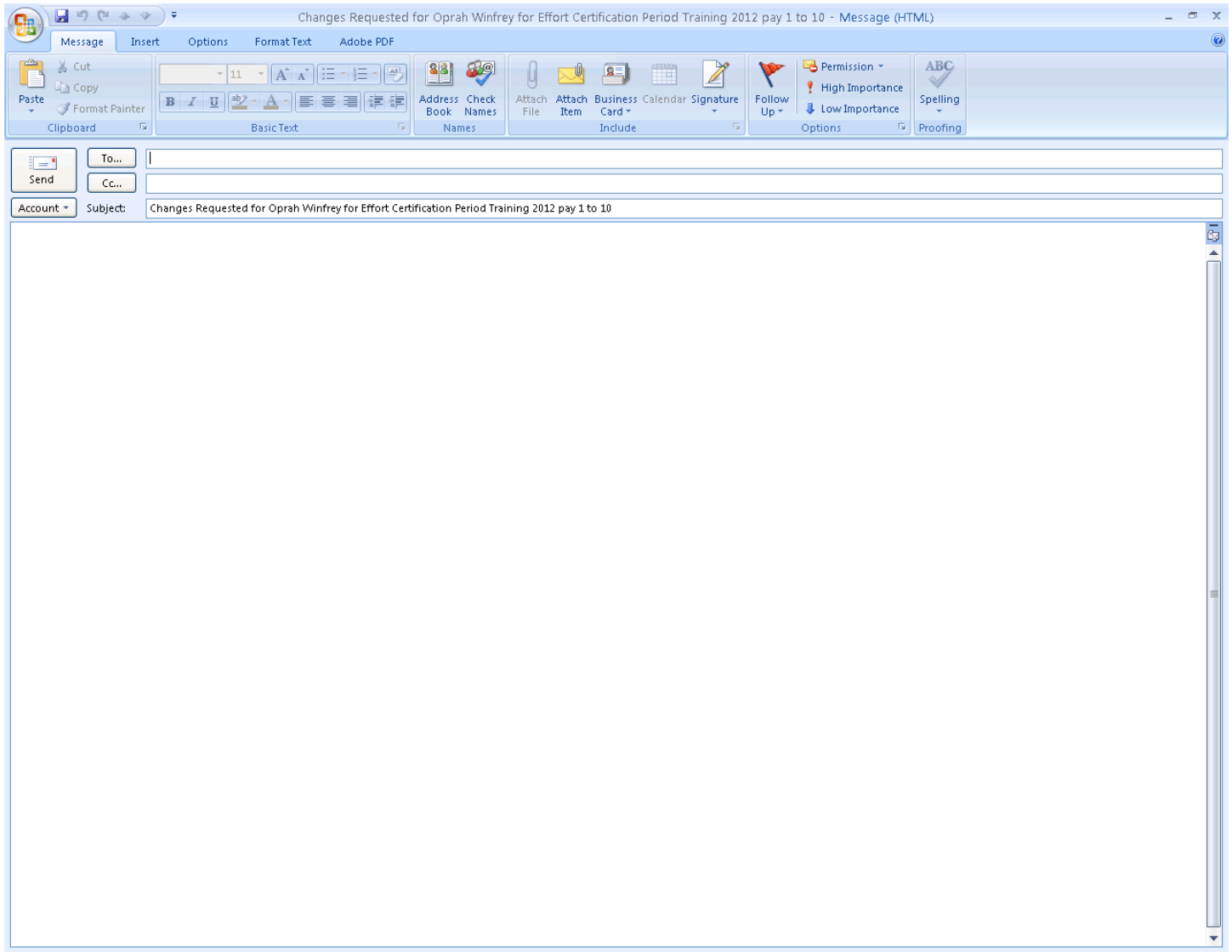
75% (Sponsored)  
 25% (Non Sponsored)

**Proxy or Superuser**

You are acting as a Superuser

[Request Changes](#) [Add New Funding](#)

- 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.



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.

**Effort Certification - Windows Internet Explorer**

http://zerotest.uah.edu:8689/efc/efc-flex/index.html

File Edit View Favorites Tools Help

Oracle Fusion Middleware Fo... Effort Certification Oracle Fusion Middleware Fo...

**Effort Certification** Labor Redistribution Sign Out ? Help

Review or Certify Reports

Effort Report Actions: New Refresh Open Save Copy Delete More Actions Close

**Effort Report** Oprah Winfrey

Pay Period Summary

Comments

Routing Queue

**Sponsored**

Fund	Organization	Effort Category	Charge Type	Effort
20001 S/ALDOT/Grade Slo	2345AC S/ALDOT/Grade Slo	20 Research	Direct	75

**Total** Sponsored Activity 75.00%

**Non Sponsored**

Fund	Organization	Effort Category	Charge Type	Effort
15000 O & M General	234100 E & C Engineering		Direct	25

**Total** Non Sponsored Activity 25.00%

**Total** 100.00%

Clear Changes

**Effort Report Overview**

Report Status Dates

20120110

Training 2012 pay 1 to 10

Mar 16, 2012 - Aug 31, 2012

Awaiting Certification - Changes

Changed by Candace Horch

**Funding Chart**

75%

25%

**Proxy or Superuser**

You are acting as a Superuser

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Done Internet 100%

- 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.

The screenshot shows the 'Effort Certification' web application in a Windows Internet Explorer browser. The main content area is titled 'Review or Certify Reports' and includes a search bar with the text 'Search Descriptions: ID = a25167750'. Below the search bar is a table with the following data:

COA	Period Code	Report Period	Last Name	First Name	ID	Start Date	End Date	Status	Unlocked/Locked
H	20120110	Training 2012 pay 1	Winfrey	Oprah	A25167750	March 16, 2012	August 31, 2012	Awaiting Certificatio	Changes Submitted

The interface also features a left sidebar with 'Certify My Effort', 'Review or Certify Reports', and 'Proxy or Superuser' options. At the bottom, there is a footer with 'SUNGARD HIGHER EDUCATION' and 'Banner Effort Certification (Release 8.5)'.

- 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.

The screenshot displays the Effort Certification interface for user Oprah Winfrey. The main content area is divided into two sections: 'Sponsored' and 'Non Sponsored' activity.

Fund	Organization	Effort Category	Charge Type	Effort
20001 S/ALDOT/Grade Sk	2345AC S/ALDOT/Grade S	20 Research	Direct	75
<b>Total</b>				Sponsored Activity 75.00%

Fund	Organization	Effort Category	Charge Type	Effort
15000 O & M General	234100 E & C Engineering		Direct	25
<b>Total</b>				Non Sponsored Activity 25.00%

**Total** 100.00%

A 'Clear Changes' button is located at the bottom center of the report area.

The right-hand sidebar contains an 'Effort Report Overview' section with the following details:

- Report Status: 20120110
- Dates: Training 2012 pay 1 to 10, Mar 16, 2012 - Aug 31, 2012
- Status: Awaiting Certification - Changes
- Changed by: Candace Horch

Below the overview is a 'Funding Chart' pie chart showing 75% (orange) and 25% (green) distribution.

At the bottom of the sidebar, it indicates 'Proxy or Superuser: You are acting as a Superuser'.

The footer of the application shows 'SUNGARD HIGHER EDUCATION' and 'Banner Effort Certification (Release 8.5)'.



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

The screenshot displays the 'Effort Certification' web application in a Windows Internet Explorer browser. The main interface shows an effort report for 'Oprah Winfrey' with a 'Sponsored' activity of 75 and a 'Non Sponsored' activity of 25, totaling 100.00%. A modal dialog box titled 'Confirm Cancel Changes' is centered on the screen, asking 'Are you sure that you want to clear your changes?' with 'No' and 'Yes' buttons. The 'Yes' button is highlighted, indicating it is the intended action. The background interface includes a navigation menu, a 'Clear Changes' button, and a 'Funding Chart' pie chart showing 75% sponsored and 25% non-sponsored activity.

Fund	Organization	Effort Category	Charge Type	Effort
20001 S/ALDOT/Grade Slope Stu	2345AC S/ALDOT/Grade Slope St	20 Research	Direct	75
15000 O & M General	234100 E & C B		Direct	25

Total Sponsored Activity 75.00%

Total Non Sponsored Activity 25.00%

Total 100.00%

Effort Certification - Windows Internet Explorer

http://zerotest.uah.edu:8689/efc/efc-flex/index.html

File Edit View Favorites Tools Help

Oracle Fusion Middleware Fo... Effort Certification Oracle Fusion Middleware Fo...

Sign Out Help

Review or Certify Reports

Effort Report Actions New Refresh Open Save Copy Delete More Actions Close

Oprah Winfrey

Sponsored

Fund	Organization	Effort Category	Charge Type	Effort
20001 S/ALDOT/Grade Slo	2345AC S/ALDOT/Grade Slo	20 Research	Direct	75

Total Sponsored Activity 75.00%

Non Sponsored

Fund	Organization	Effort Category	Charge Type	Effort
15000 O & M General	234100 E & C Engineering		Direct	25

Total Non Sponsored Activity 25.00%

Total 100.00%

Request Changes Certify Add New Funding

Open Items

Effort Certification

Oprah Winfrey

Effort Report Overview

Report Status Dates

20120110

Training 2012 pay 1 to 10

Mar 16, 2012 - Aug 31, 2012

Awaiting Certification - Unlocked

Funding Chart

75%

25%

Proxy or Superuser

You are acting as a Superuser

SUNGARD HIGHER EDUCATION

Banner Effort Certification (Release 8.5)

Done Internet 100%

**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.

The screenshot displays the Banner Effort Certification web application in a Windows Internet Explorer browser. The browser's address bar shows the URL <http://zerotest.uah.edu:8889/efc/efc-flex/index.html>. The application interface includes a navigation bar with "Effort Certification" and "Labor Redistribution" tabs, and a "Sign Out" link. The main content area is titled "Oprah Winfrey" and displays a table of effort reports. A modal dialog box titled "Certify" is open in the center, containing the following text:

I certify that the effort certified this period reasonably reflects the work performed in the designated period, and that I have significant technical knowledge and/or I am in a position that provides me with a suitable means of verification that the work was performed.

The dialog box has "Cancel" and "I Agree" buttons. The background application shows a table with columns for Fund, Organization, Effort Category, Charge Type, and Effort. The table is divided into "Sponsored" and "Non Sponsored" sections. The "Sponsored" section has a total effort of 75, and the "Non Sponsored" section has a total effort of 25, for a combined total of 100.00%. On the right side, there is an "Effort Report Overview" section with a "Funding Chart" showing a pie chart with 75% and 25% segments, and a "Proxy or Superuser" section indicating the user is acting as a Superuser. The bottom of the page features the "SUNGARD HIGHER EDUCATION" logo and the text "Banner Effort Certification (Release 8.5)".

- The Routing Queue will show who certified and when.

Effort Certification - Windows Internet Explorer

http://zerotest.uah.edu:8889/efc-flex/index.html

File Edit View Favorites Tools Help

bing

User Logout Effort Certification

Sign Out ? Help

Effort Certification Labor Redistribution

Review or Certify Reports

Effort Report

Pay Period Summary

Comments

Routing Queue

Open Items

Effort Certification

Oprah Winfrey

Robert Lindquist, Acknowledge, Pre-Reviewer

Pending

E-mail

Al Sharpton, Acknowledge, Pre-Reviewer

Pending

E-mail

Gary Zank, Acknowledge, Pre-Reviewer

Pending

E-mail

Al Sharpton, Alternate Certifier

Pending

E-mail

Oprah Winfrey, Certify

Certified

E-mail Posted On March 24, 2012 at 04:51 PM by Candace Horch

Robert Lindquist, Acknowledge, Post-Reviewer

Pending

E-mail

Al Sharpton, Acknowledge, Post-Reviewer

Pending

E-mail

Effort Report Overview

Report Status Dates

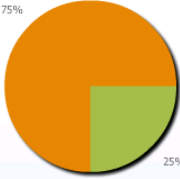
20120110

Training 2012 pay 1 to 10

Mar 16, 2012 - Aug 31, 2012

Completed - Locked

Funding Chart



75%

25%

Proxy or Superuser

You are acting as a Superuser

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Done Internet 100%

- 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.

Effort Certification - Windows Internet Explorer

http://zerotest.uah.edu:8889/efc/efc-flex/index.html

File Edit View Favorites Tools Help

bing

User Logout Effort Certification

Sign Out ? Help

Effort Certification Labor Redistribution

Certify My Effort

Review or Certify Reports

Proxy or Superuser

Effort Report Actions New Refresh Open Save Copy Delete More Actions Close

Review or Certify Reports

Search by ID

Search Descriptions: ID = a25167750

Advanced Search

Displaying 1 row.

COA	Period Code	Report Period	Last Name	First Name	ID	Start Date	End Date	Status	Unlocked/Locked
H	20120110	Training 2012 pay 1	Winfrey	Oprah	A25167750	March 16, 2012	August 31, 2012	Completed	Locked

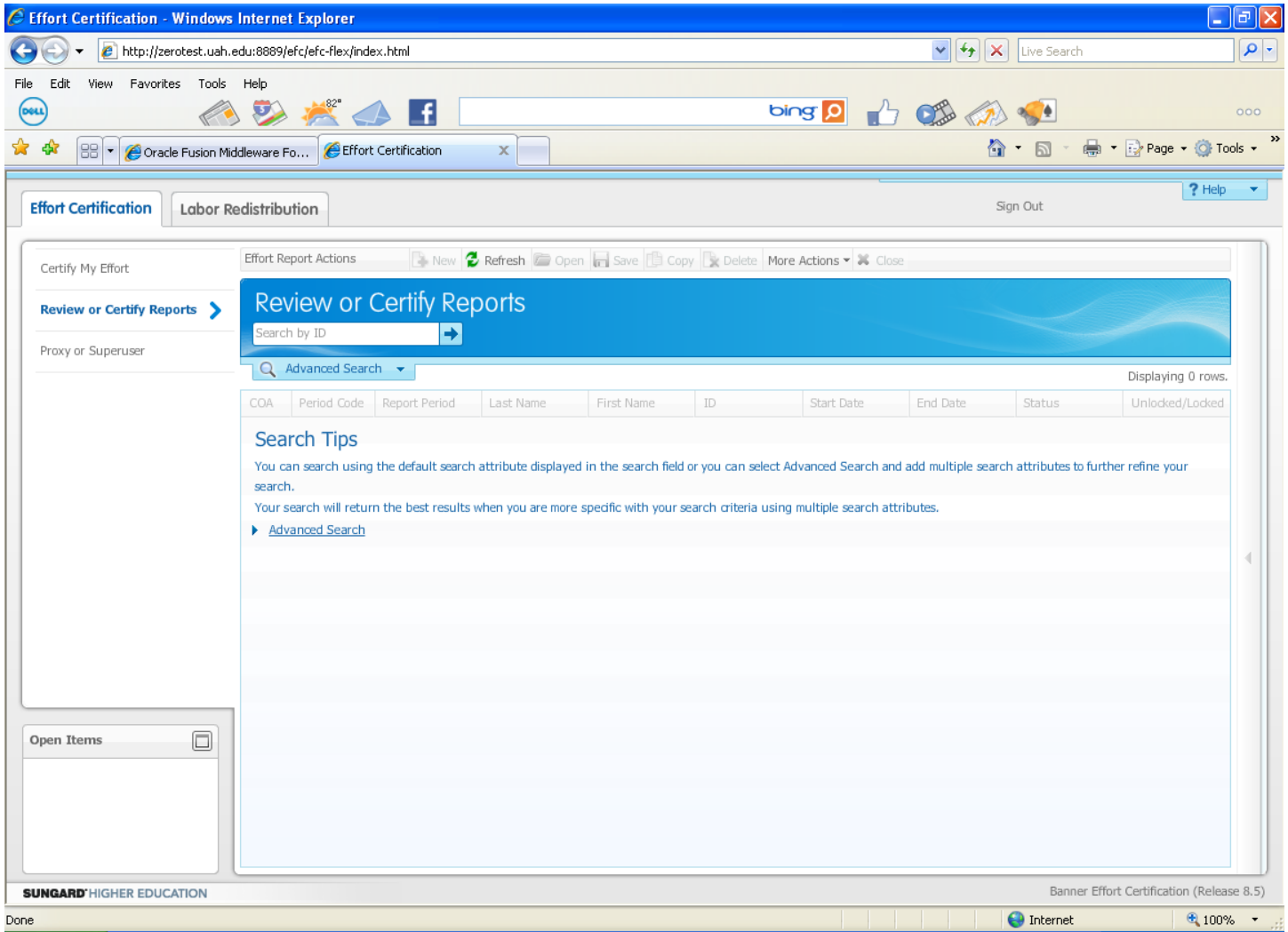
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Banner Effort Certification (Release 8.5)

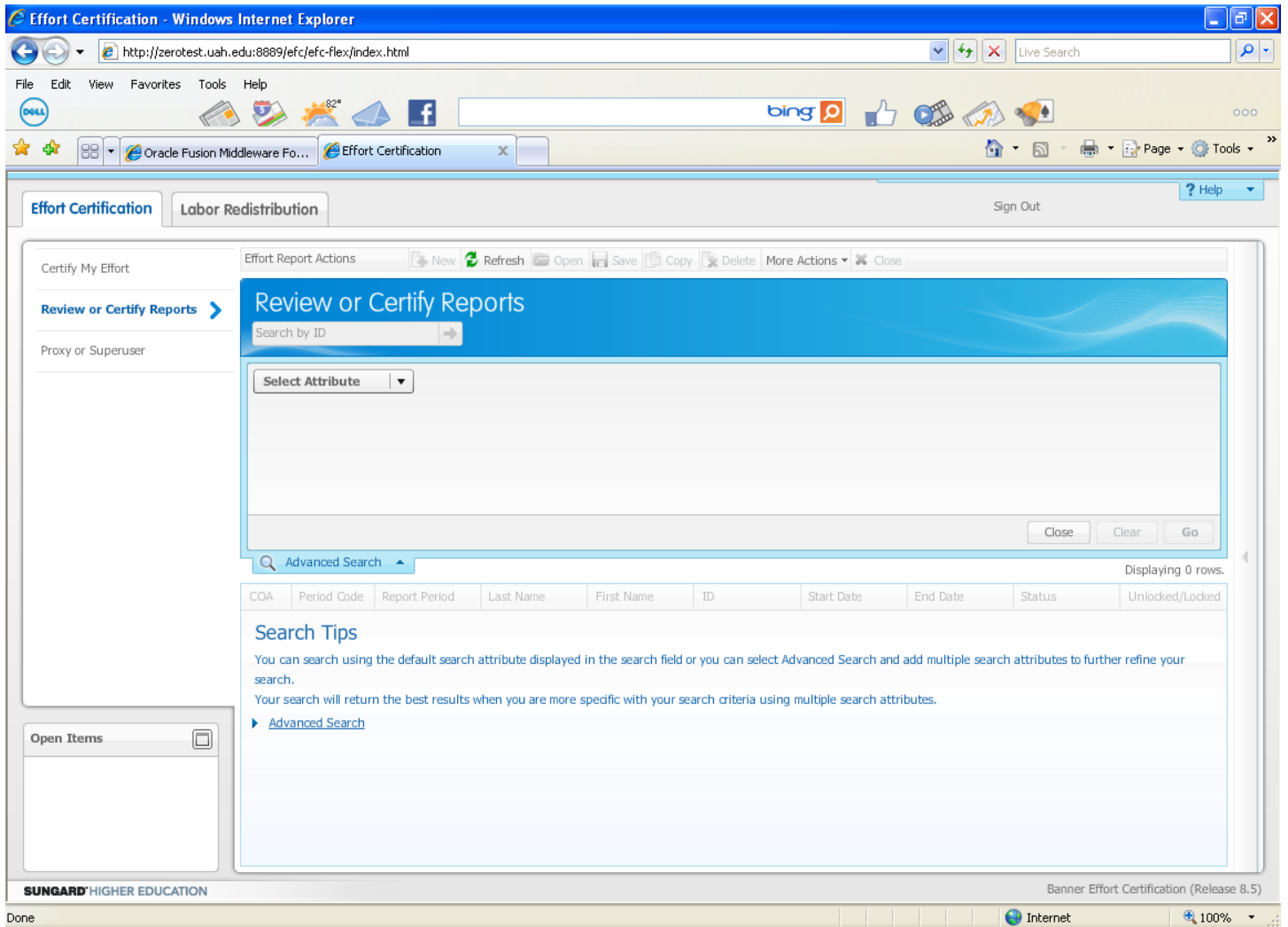
Done Internet 100%

**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.



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

Effort Certification - Windows Internet Explorer

http://zerotest.uah.edu:8889/efc-flex/index.html

File Edit View Favorites Tools Help

Oracle Fusion Middleware Fo... Effort Certification

Effort Certification Labor Redistribution Sign Out Help

Certify My Effort

Review or Certify Reports

Proxy or Superuser

Effort Report Actions New Refresh Open Save Copy Delete More Actions Close

Review or Certify Reports

Search by ID

Select Attribute

- Chart of Account Code
- Effort Period Code
- Effort Period Description
- First Name
- ID

Close Clear Go

Advanced Search

Displaying 0 rows.

COA	Period Code	Report Period	Last Name	First Name	ID	Start Date	End Date	Status	Unlocked/Locked
<p><b>Search Tips</b></p> <p>You can search using the default search attribute displayed in the search field or you can select Advanced Search and add multiple search attributes to further refine your search.</p> <p>Your search will return the best results when you are more specific with your search criteria using multiple search attributes.</p> <p><a href="#">Advanced Search</a></p>									

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Done Internet 100%



- Enter H in the Chart of Account Code field. The H must be capitalized.

Effort Certification - Windows Internet Explorer

http://zerotest.uah.edu:8889/efc-flex/index.html

File Edit View Favorites Tools Help

Oracle Fusion Middleware Fo... Effort Certification

Effort Certification Labor Redistribution Sign Out Help

Certify My Effort

Review or Certify Reports

Proxy or Superuser

Effort Report Actions New Refresh Open Save Copy Delete More Actions Close

Review or Certify Reports

Search by ID

Chart of Account Code H

Select Attribute

Close Clear Go

Advanced Search

Displaying 0 rows.

COA	Period Code	Report Period	Last Name	First Name	ID	Start Date	End Date	Status	Unlocked/Locked
-----	-------------	---------------	-----------	------------	----	------------	----------	--------	-----------------

Search Tips

You can search using the default search attribute displayed in the search field or you can select Advanced Search and add multiple search attributes to further refine your search.

Your search will return the best results when you are more specific with your search criteria using multiple search attributes.

Advanced Search

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Banner Effort Certification (Release 8.5)

Done Internet 100%

- Select the **Effort Period Code** attribute.

Effort Certification - Windows Internet Explorer

http://zerotest.uah.edu:8889/efc/efc-flex/index.html

File Edit View Favorites Tools Help

Oracle Fusion Middleware Fo... Effort Certification

Effort Certification Labor Redistribution Sign Out Help

Certify My Effort

Review or Certify Reports

Proxy or Superuser

Effort Report Actions New Refresh Open Save Copy Delete More Actions Close

Review or Certify Reports

Search by ID

Chart of Account Code H

Effort Period Code

Select Attribute

Close Clear Go

Advanced Search

Displaying 0 rows.

COA	Period Code	Report Period	Last Name	First Name	ID	Start Date	End Date	Status	Unlocked/Locked
-----	-------------	---------------	-----------	------------	----	------------	----------	--------	-----------------

Search Tips

You can search using the default search attribute displayed in the search field or you can select Advanced Search and add multiple search attributes to further refine your search.

Your search will return the best results when you are more specific with your search criteria using multiple search attributes.

[Advanced Search](#)

Open Items

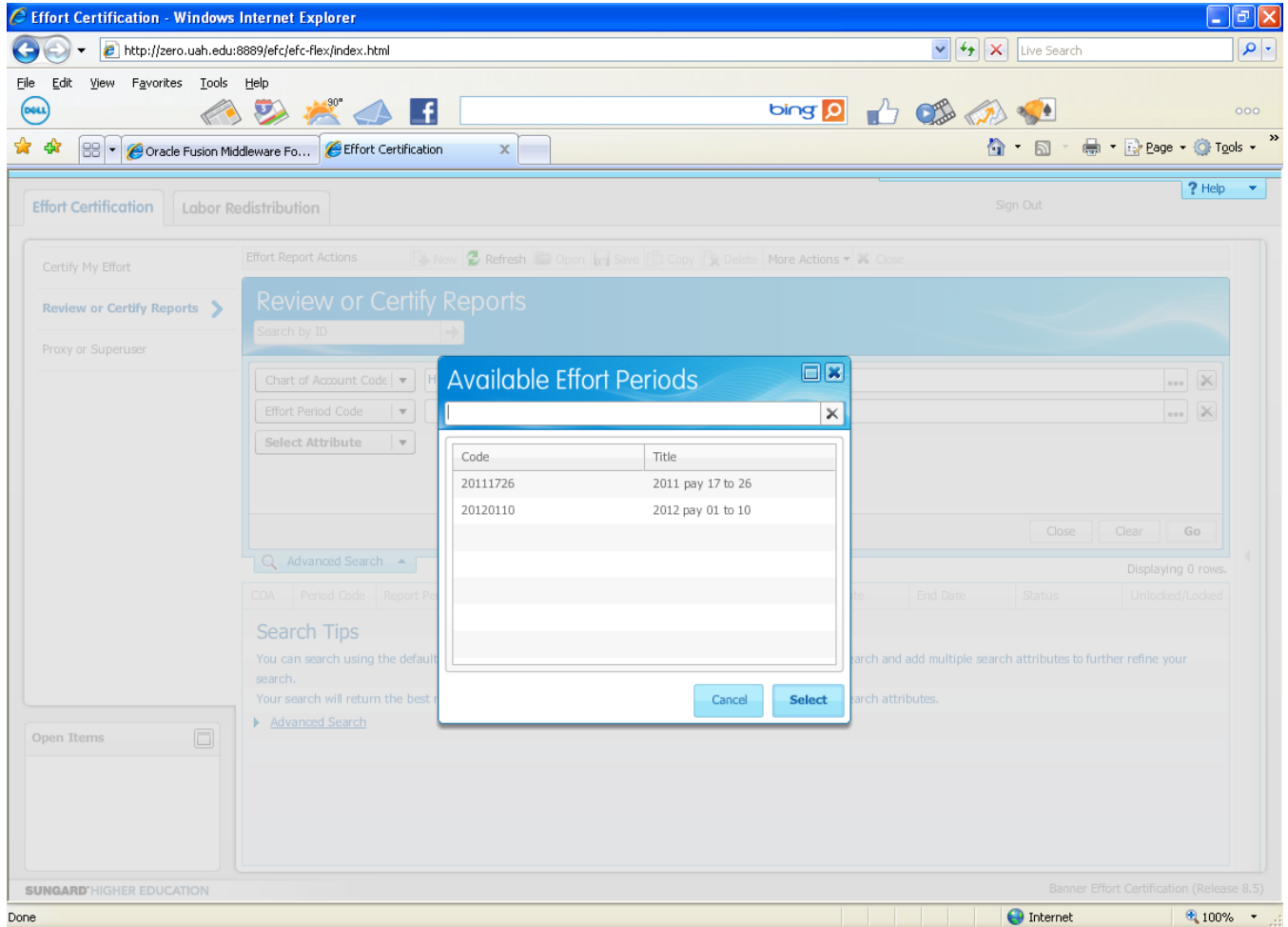
SUNGARD HIGHER EDUCATION

Banner Effort Certification (Release 8.5)

Done Internet 100%

- 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.

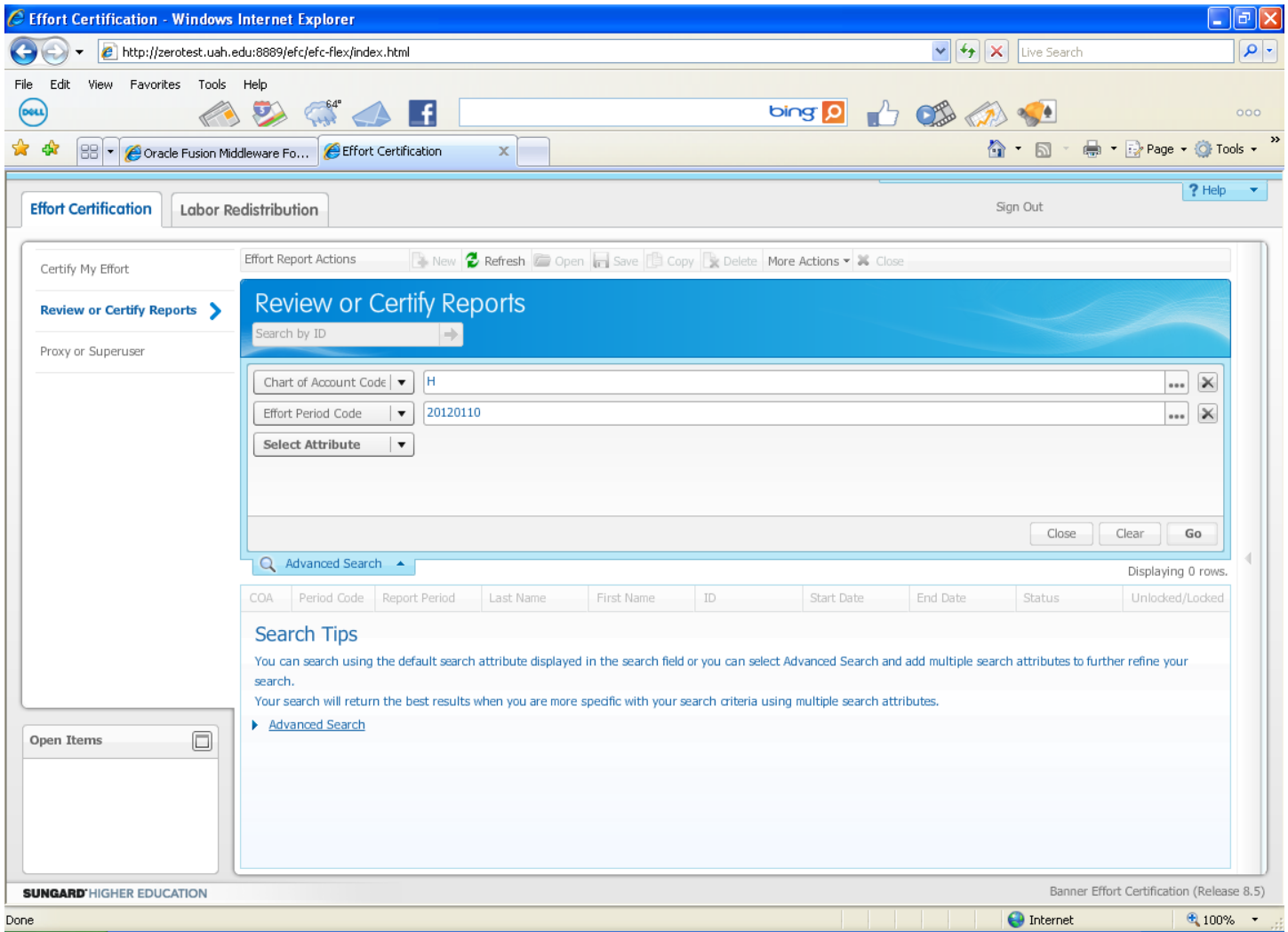
Note: You can search by Last Name, First Name, ID, COA, Status, and State. You must provide at least two characters of the First Name, Last Name, or ID. You can use an asterisk (\*) as a wild card with any listed attribute.



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

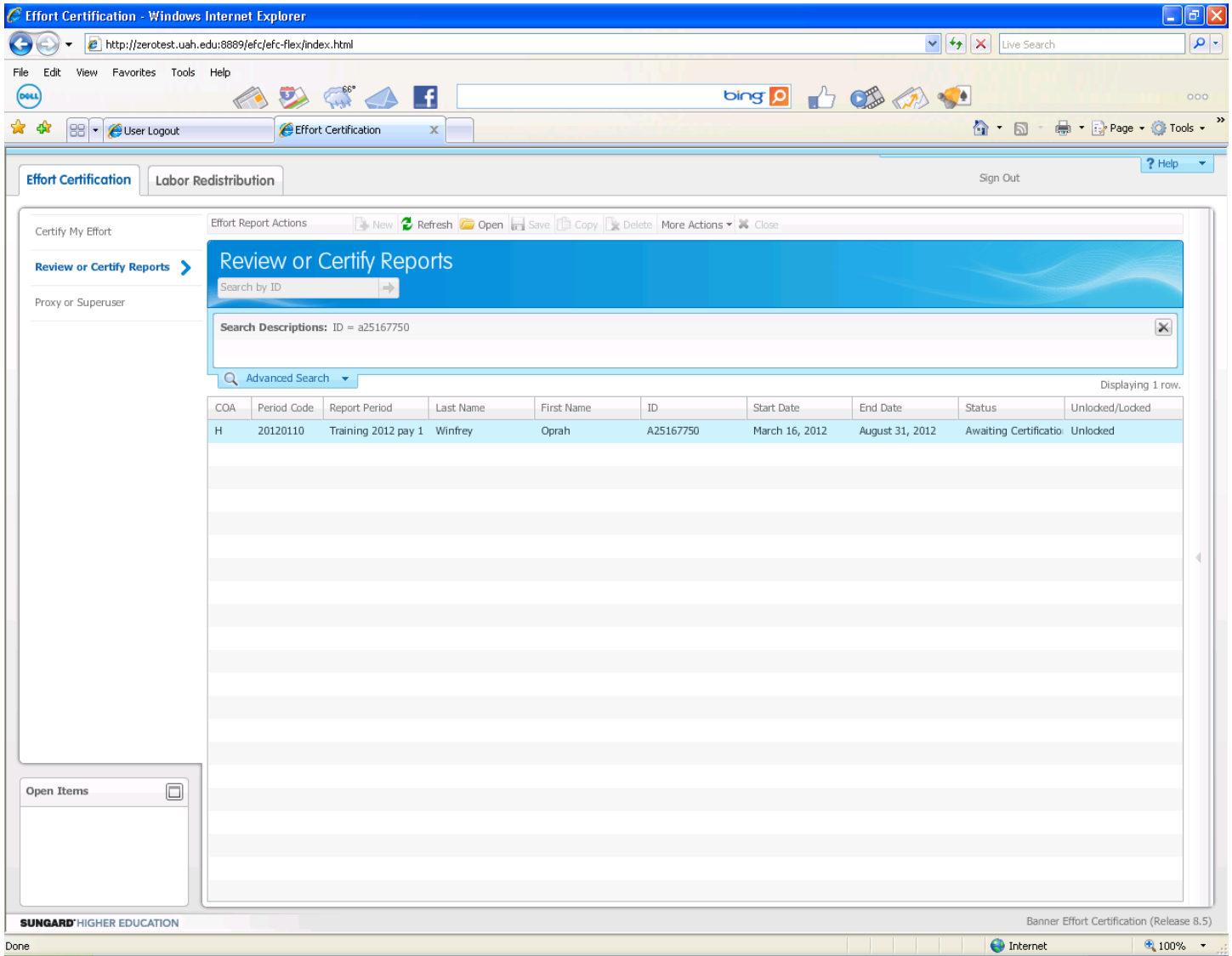
Use the **X** icon at the right of the attribute field to remove individual attributes.

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.



- 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**