## 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, go 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, please notify the Effort Reporting Officer and the person in your department responsible for originating Retros.
- Close your report using the blue **Close** icon at the top of the screen.

  **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 22 of the detailed instructions.)*
- After you close the report using the blue **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.

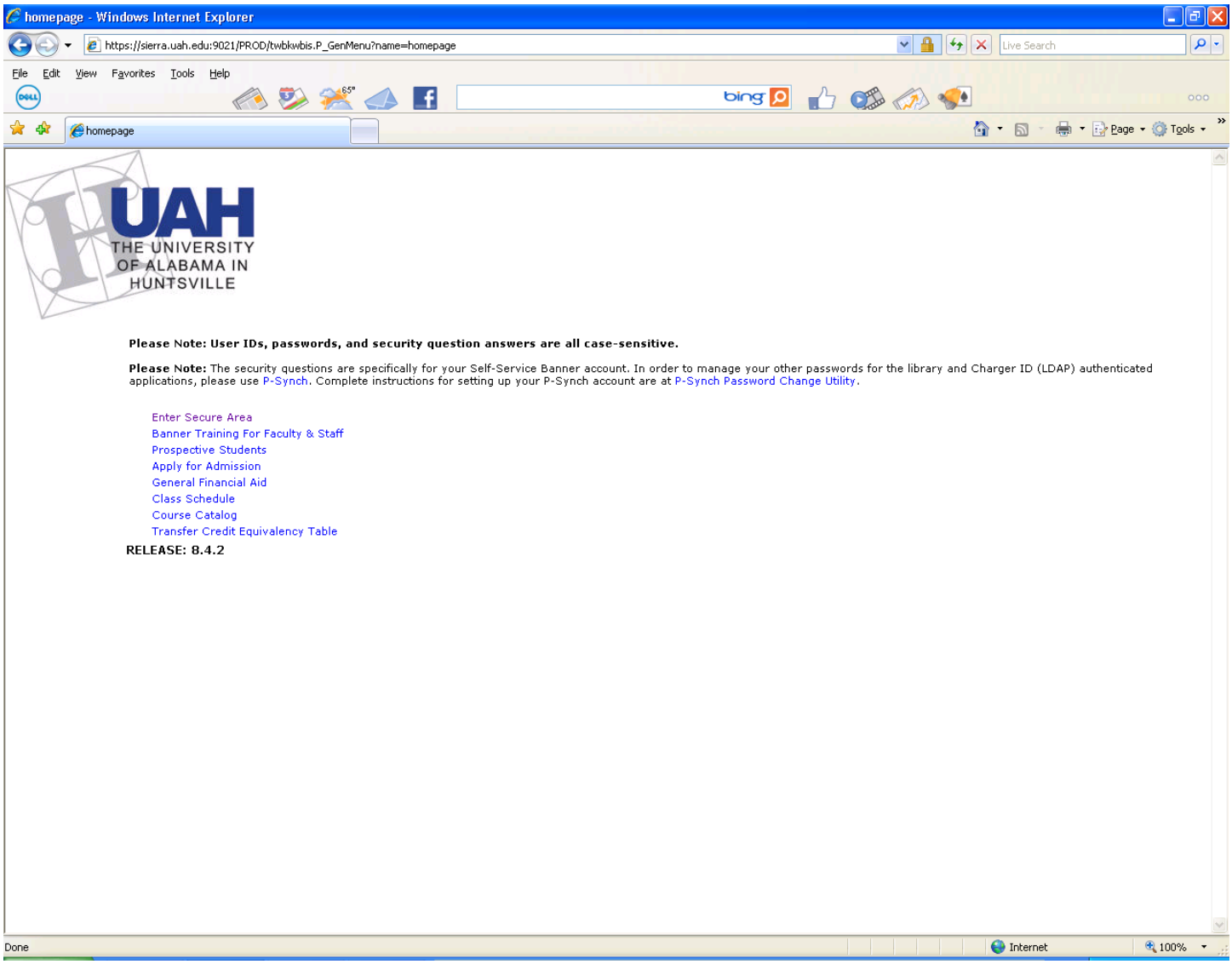
  Use the **Clear** button at the bottom of the attributes area to remove all your selected search criteria attributes.

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

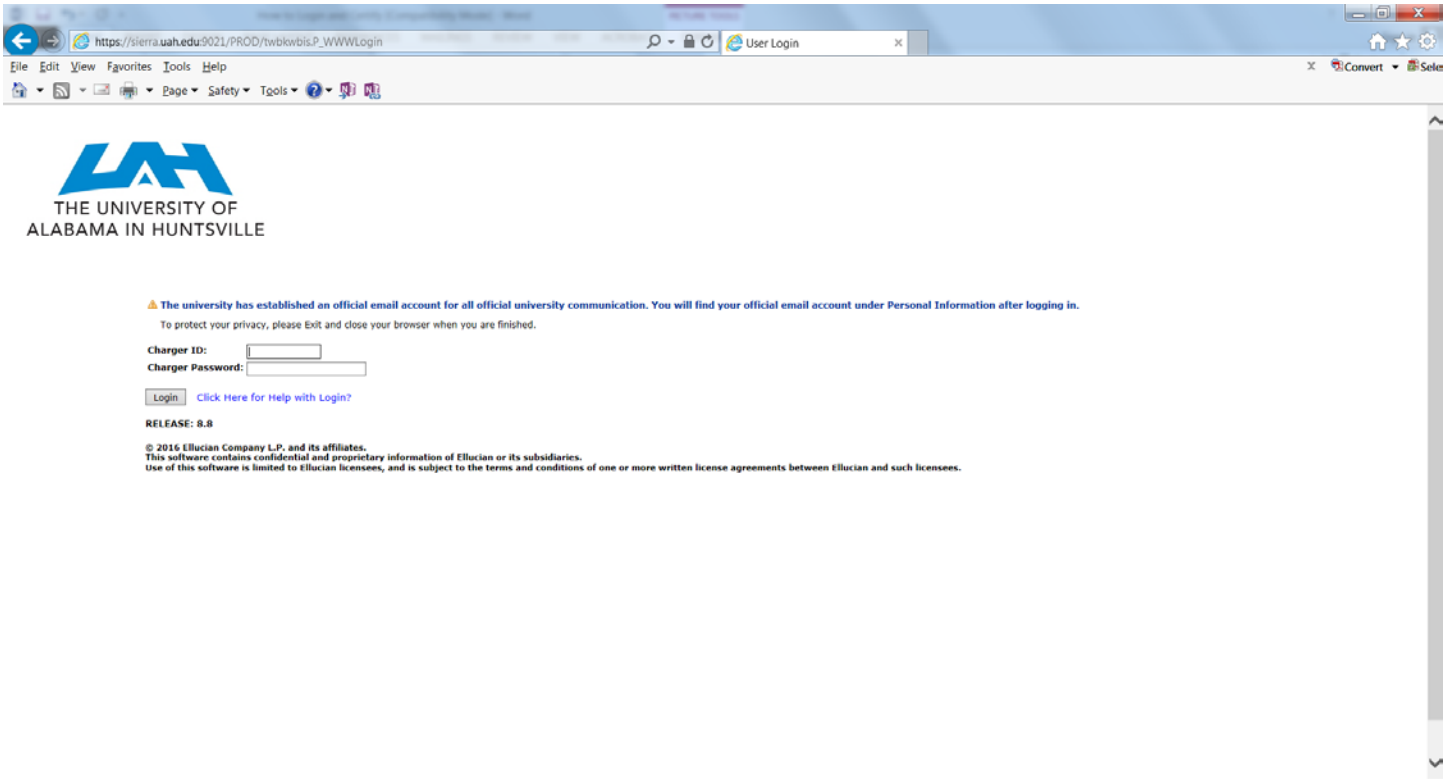
  Use the **Close** button at the bottom of the attributes area to close the attribute window.
- Click on the **Go** button or press Enter on your keyboard.
- Click the directional arrow on any column header to reorder lowest to highest or highest to lowest value.
- Highlight the line of the report you 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.

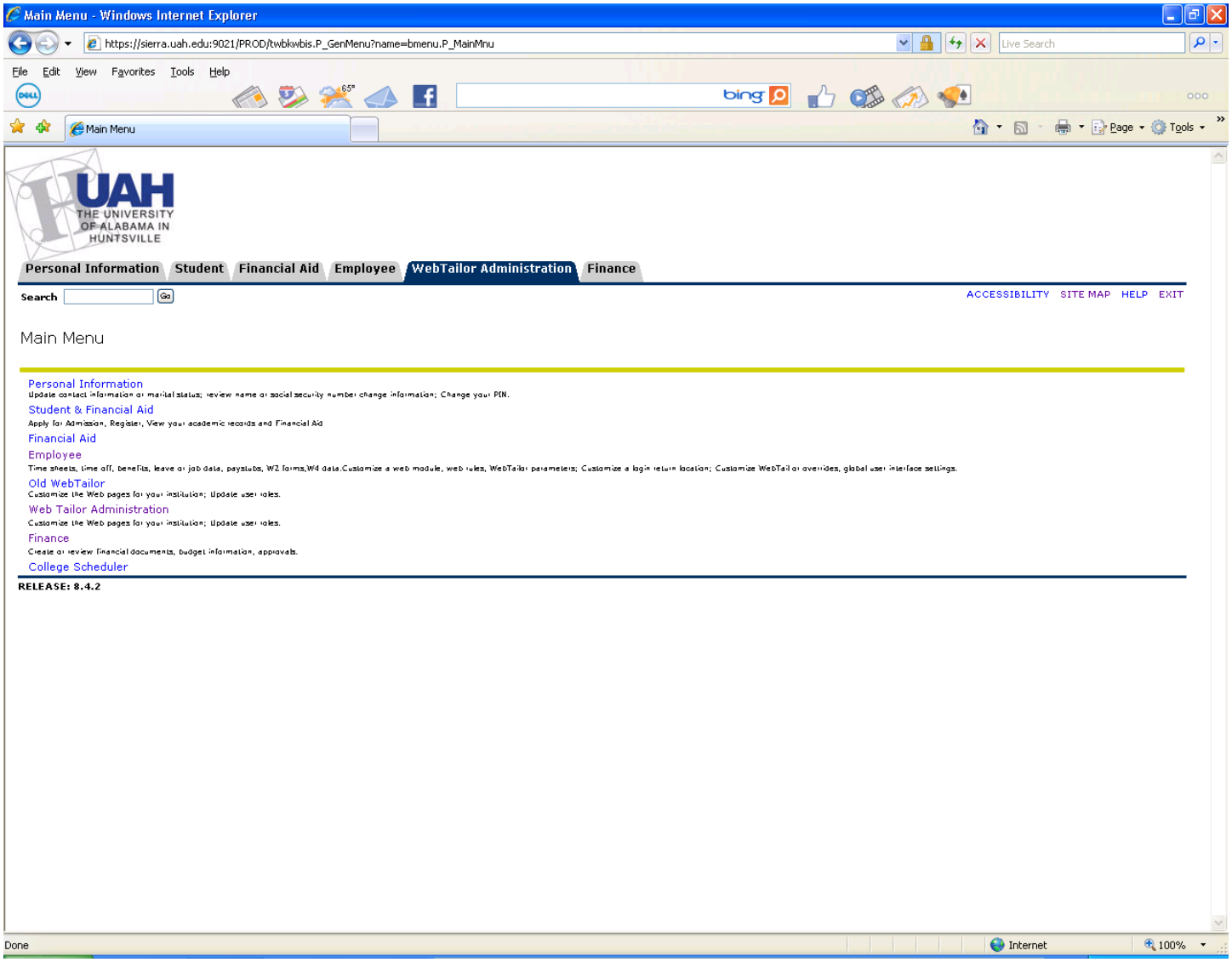


- In the field labeled **Charger ID**, enter your Charger ID.
- Enter your **Charger Password**. If you need assistance with your Login, click on the link, Click Here for Help with Login? Or go to https://apps.uah.edu/PasswordReset/.

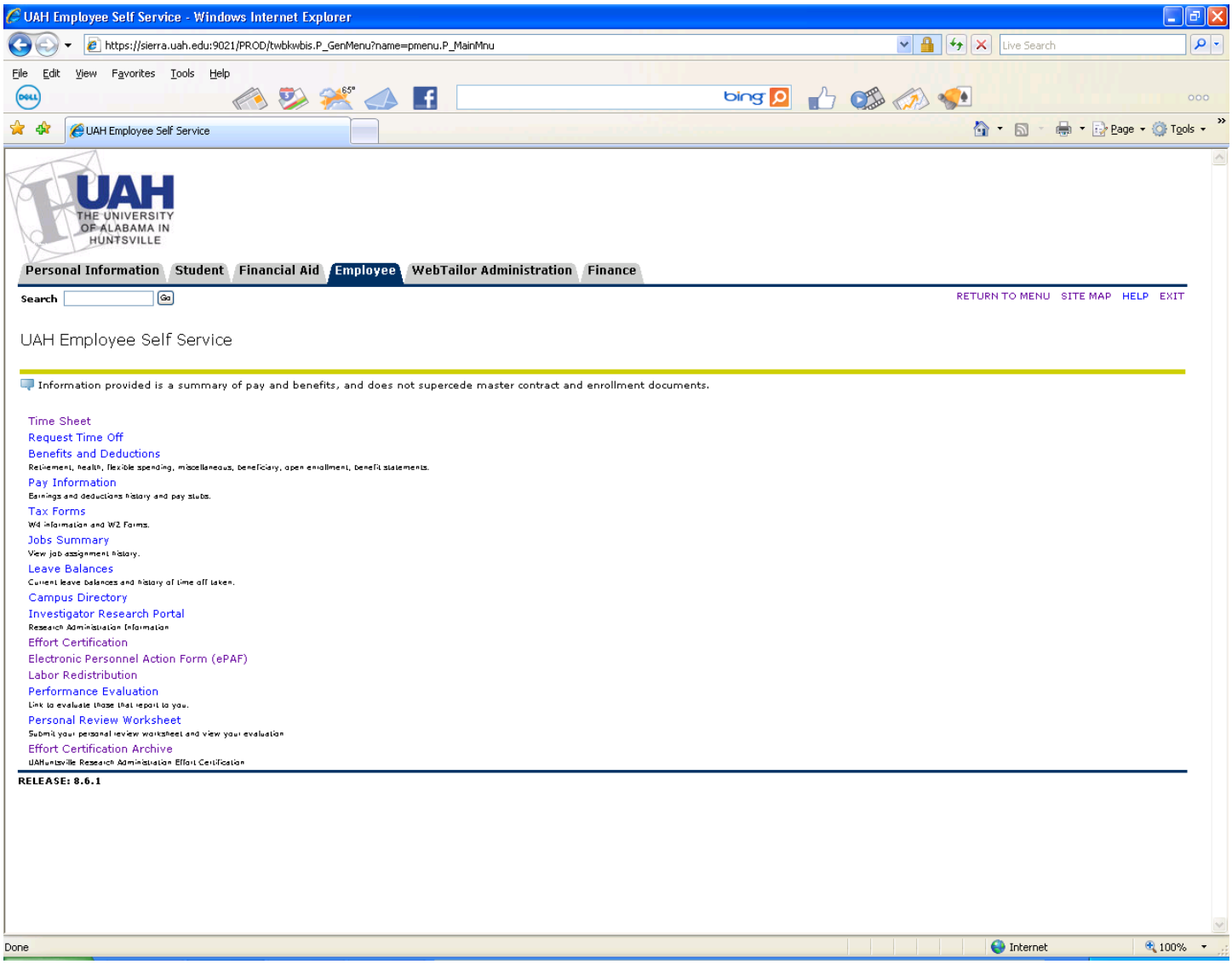



- Click on the **Login** button with your mouse or press “Enter” on your keyboard.

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

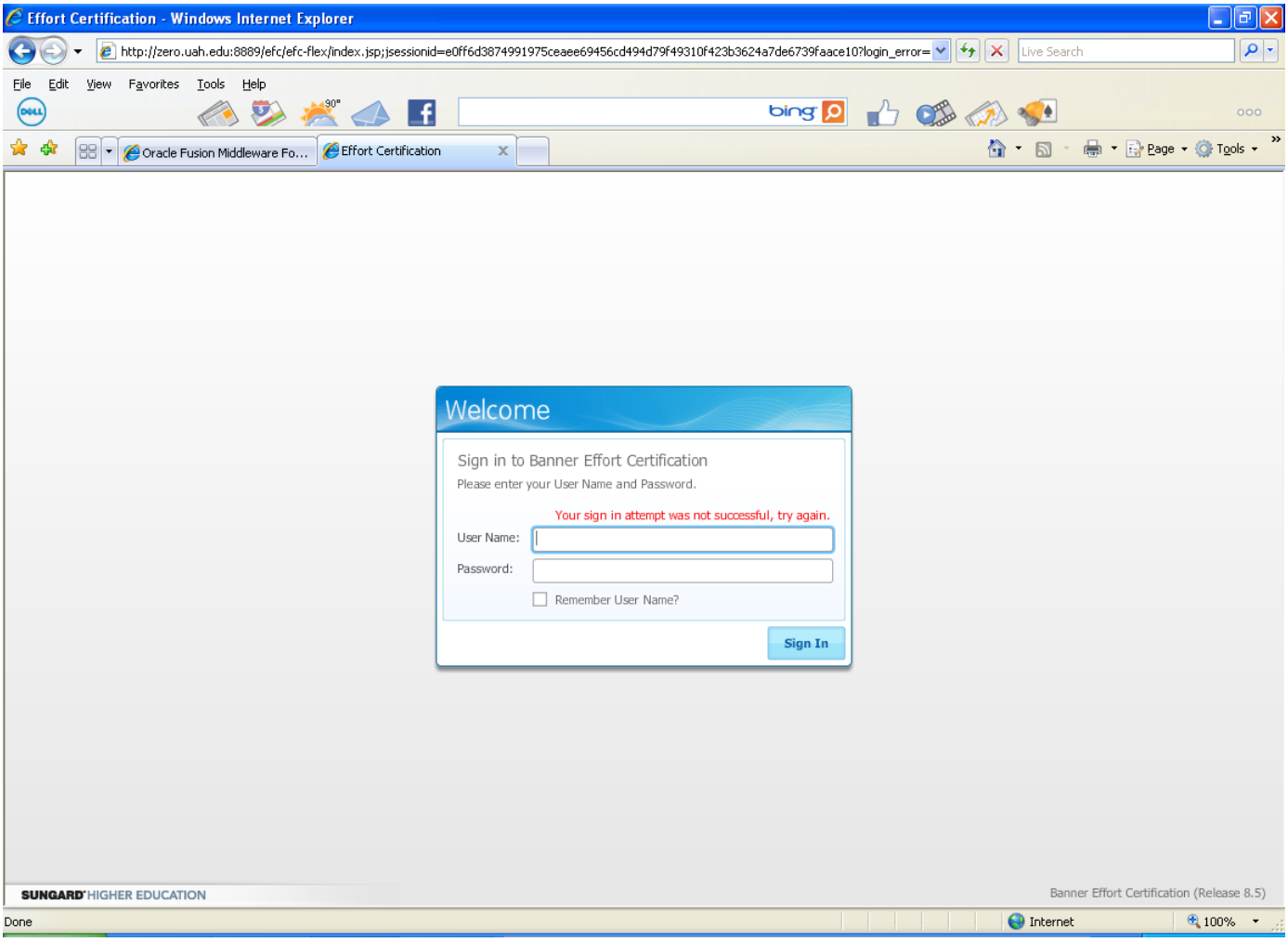


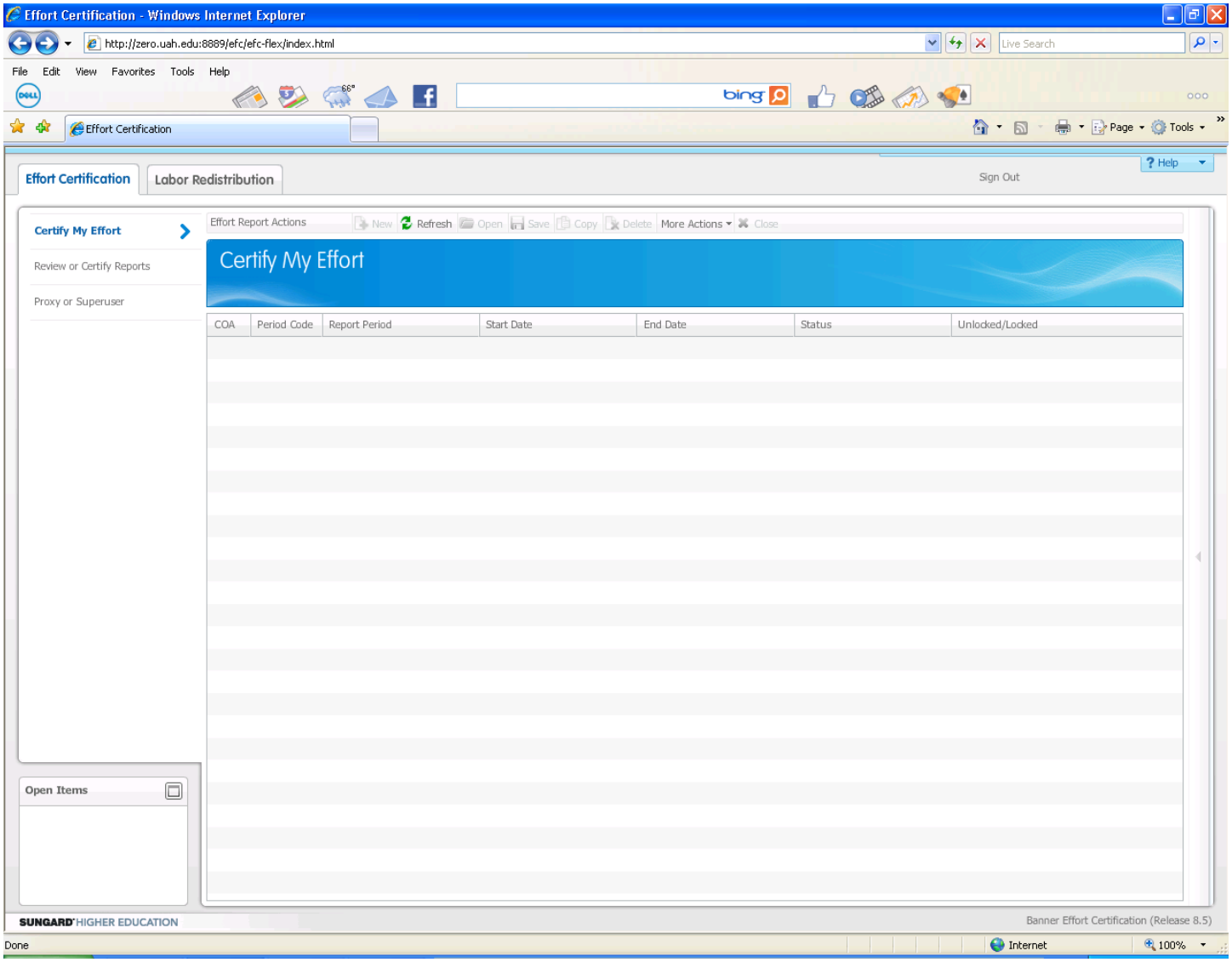

- Click on the **Employee** Tab.




- 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.

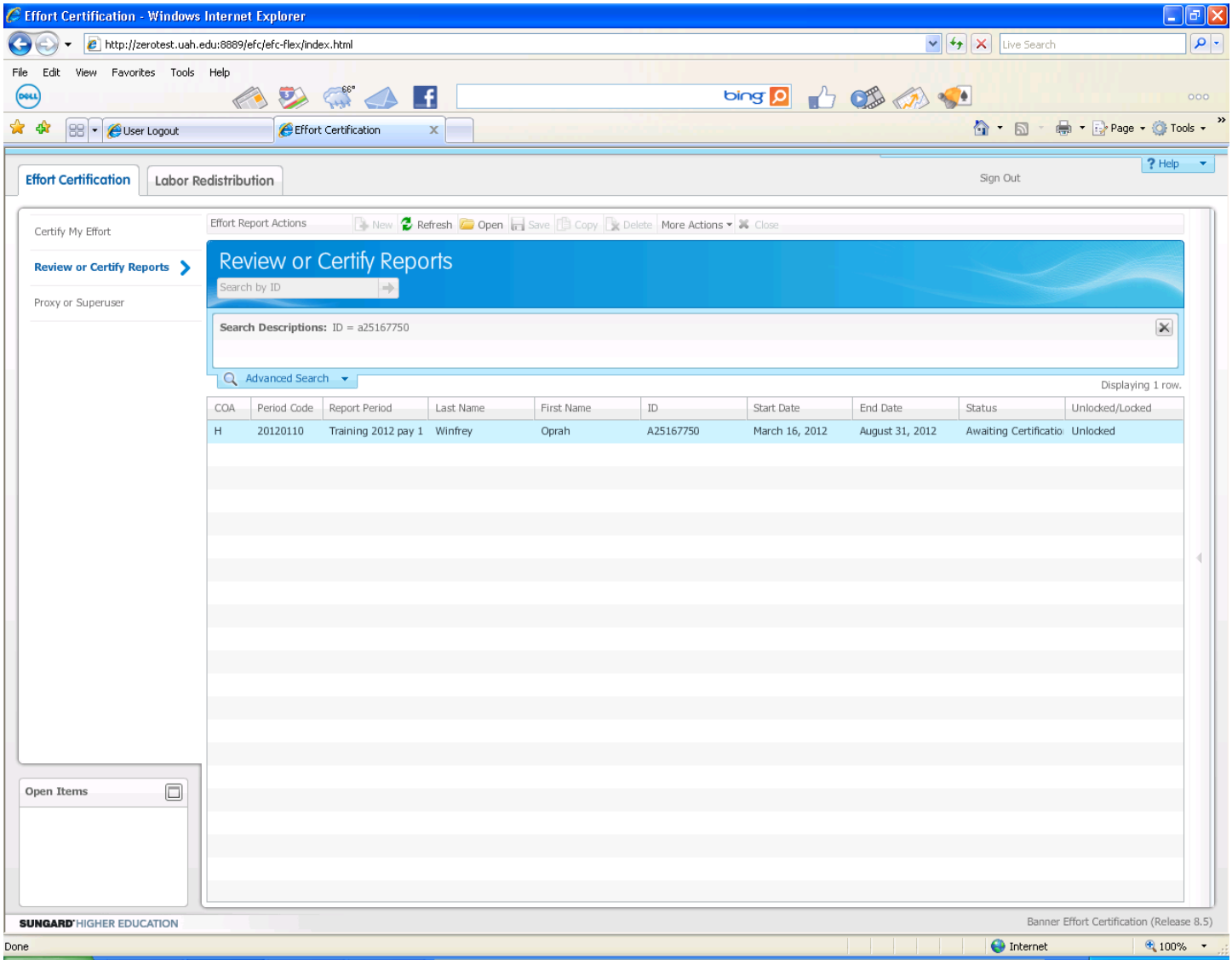



Effort Certification - Windows Internet Explorer
http://zero.uah.edu:8889/efc/efc-flex/index.html
Live Search
File Edit View Favorites Tools Help
Effort Certification
Page Tools
Effort Certification
Labor Redistribution
Help
Sign Out
Certify My Effort
Review or Certify Reports
Proxy or Superuser
Effort Report Actions
New Refresh Open Save Copy Delete More Actions Close
Certify My Effort
COA
Period Code
Report Period
Start Date
End Date
Status
Unlocked/Locked
Open Items
SUNGARD HIGHER EDUCATION
Banner Effort Certification (Release 8.5)
Done
Internet
100%

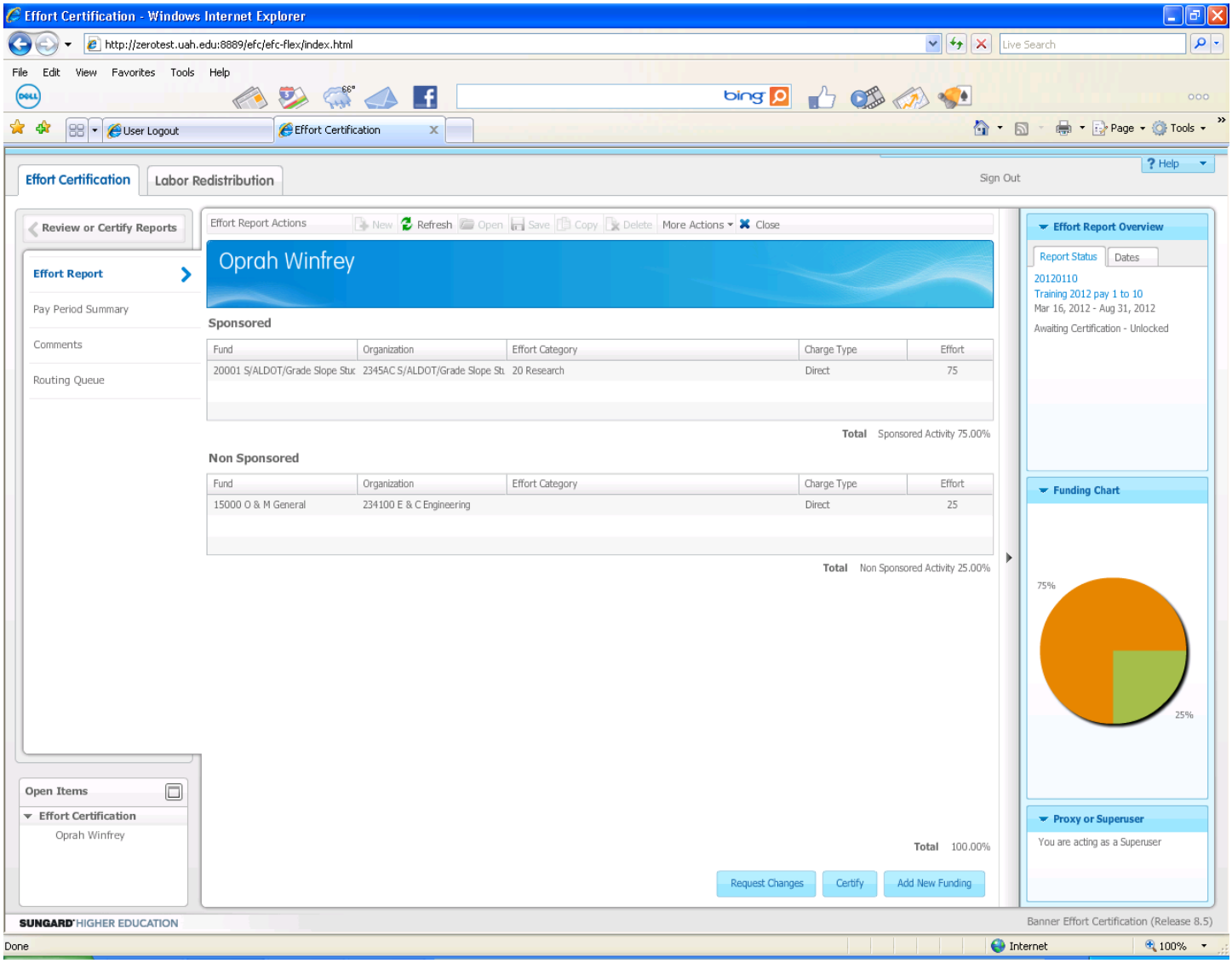
**There are 2 methods to view and certify your report.**

**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.



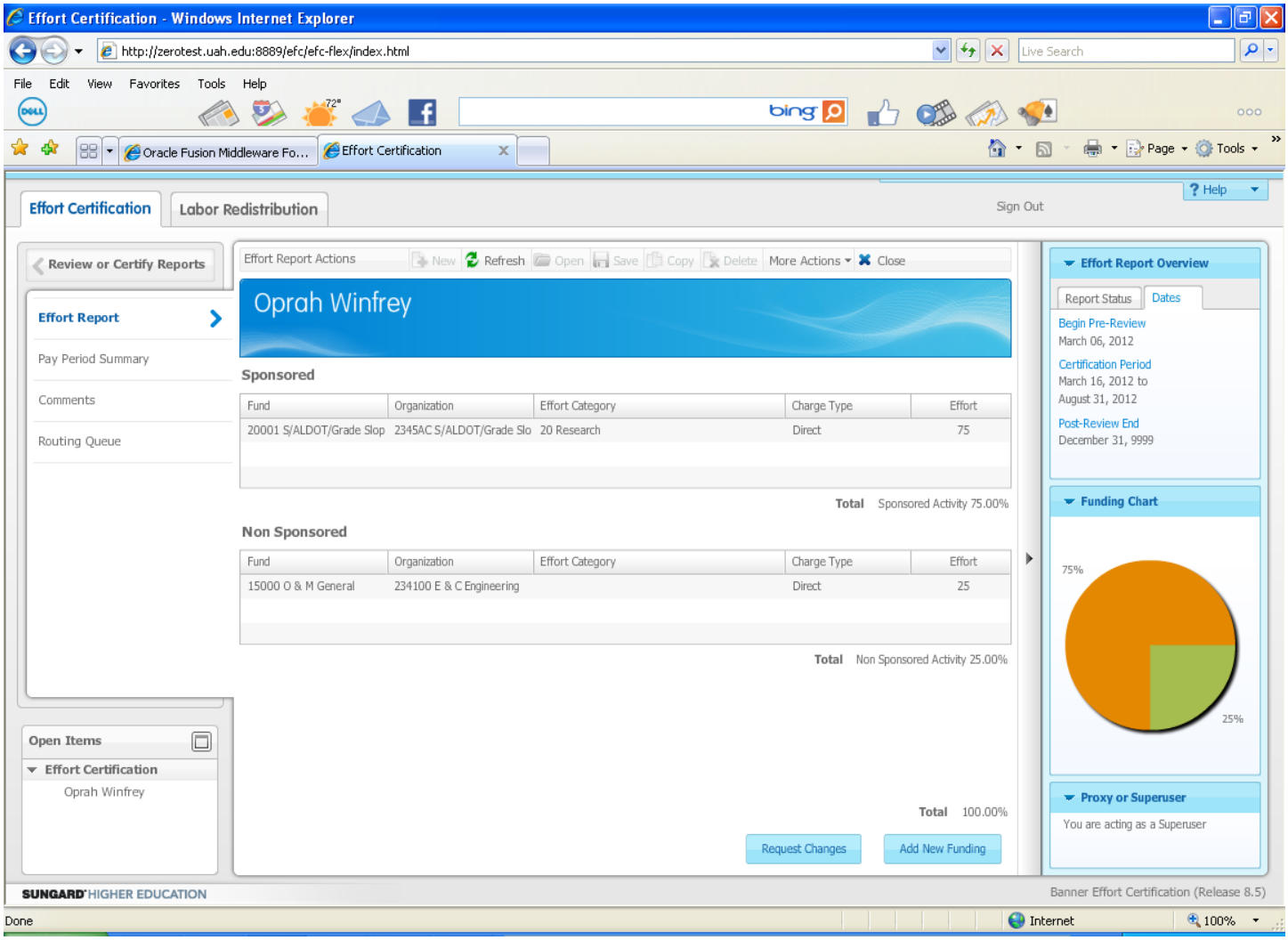
You will see the certification page.




(You may resize the columns to view the entire title of each org, grant, and fund.)

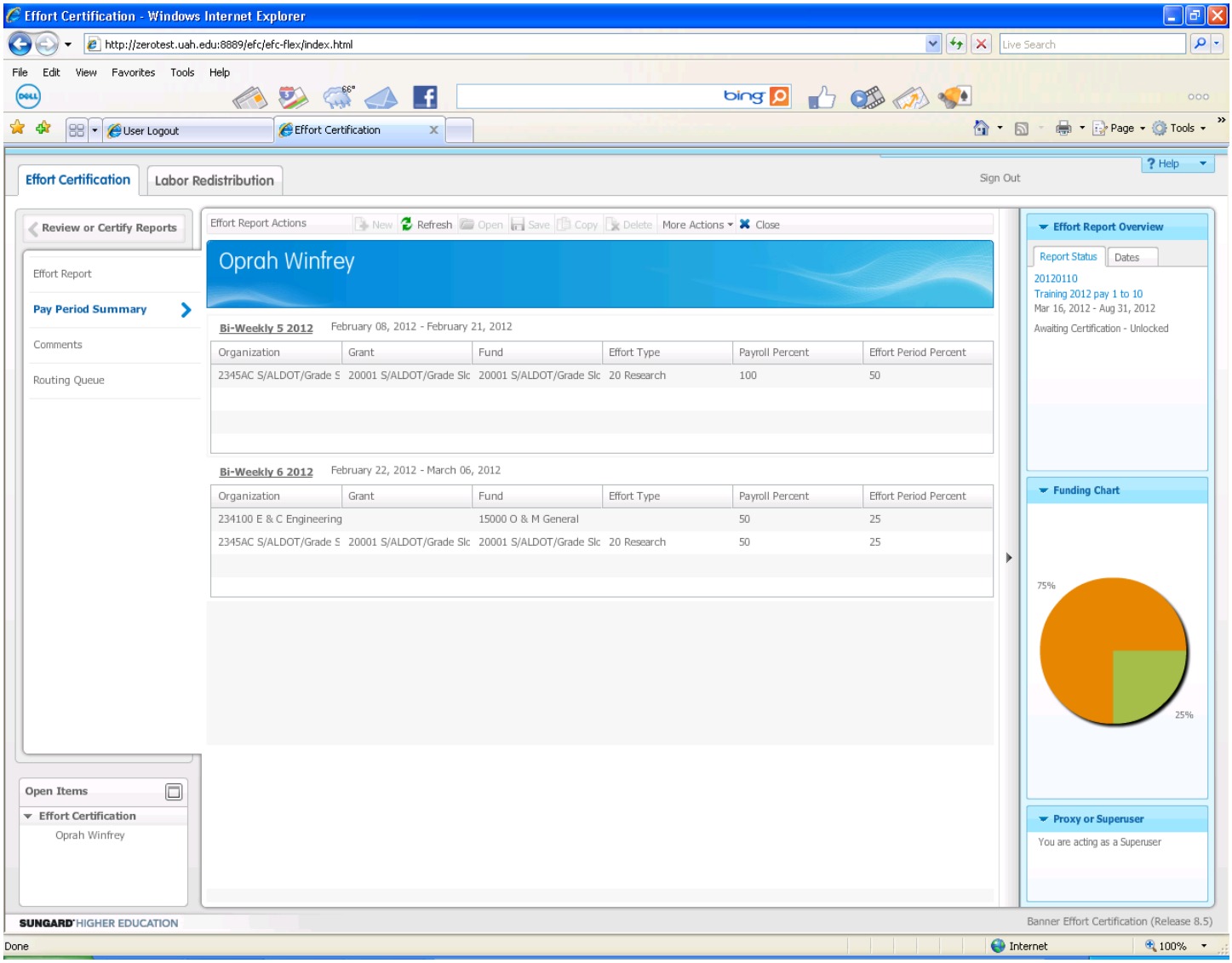
Notice the information in the upper right block. It gives you the code for the report (20120110), the full name of the report (Training 2012 pay 1 to 10), the dates covered in the report (Mar 16, 2012 – Aug 21, 2012), and the status (Awaiting Certification – Unlocked.)

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



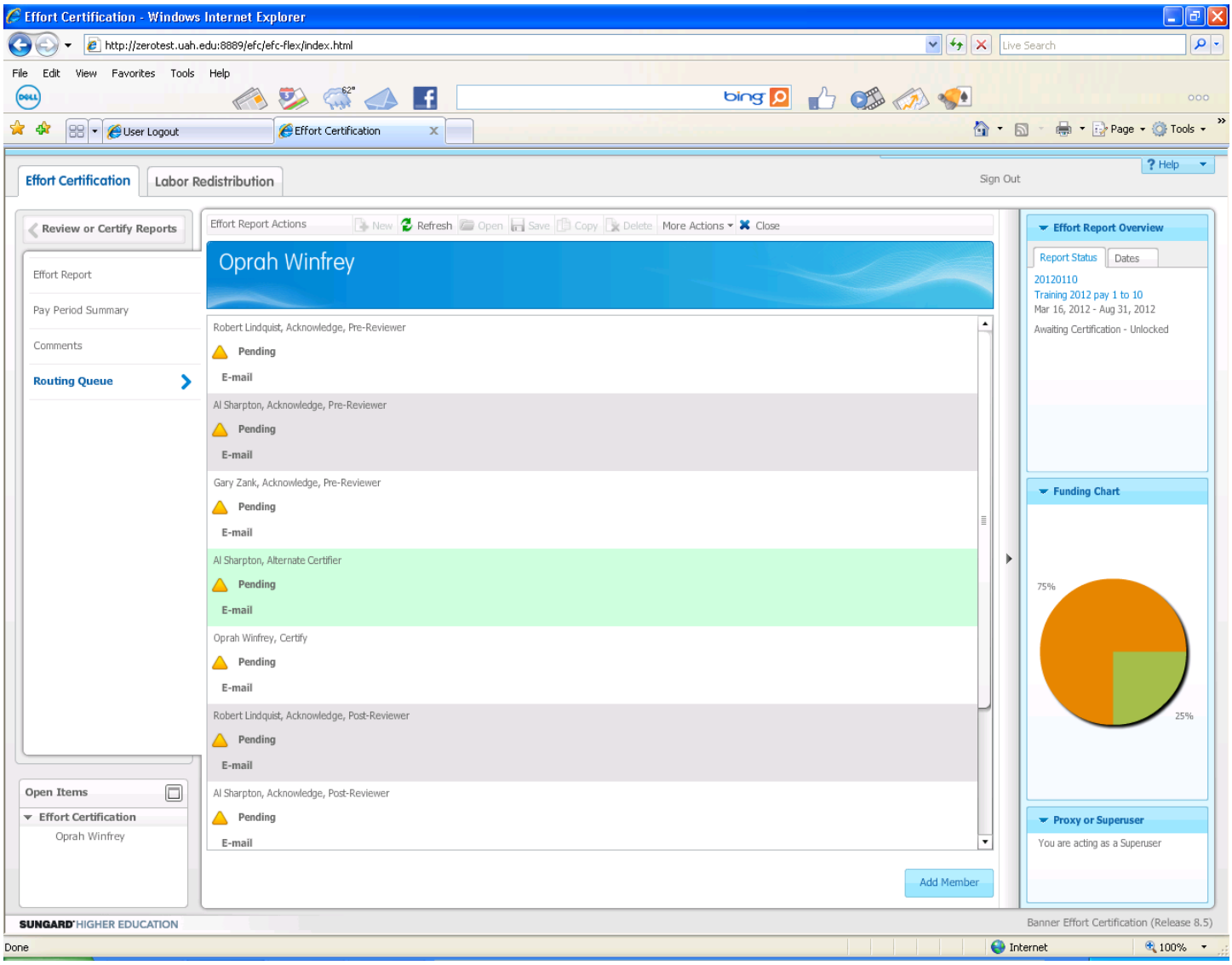

Notice the information. There is a date for Begin Pre-Review, which allows review of the report before the certification period begins. There are also the dates for the certification period, and the Post-Review End date. In this case, it shows that you will be able to review the report until the year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



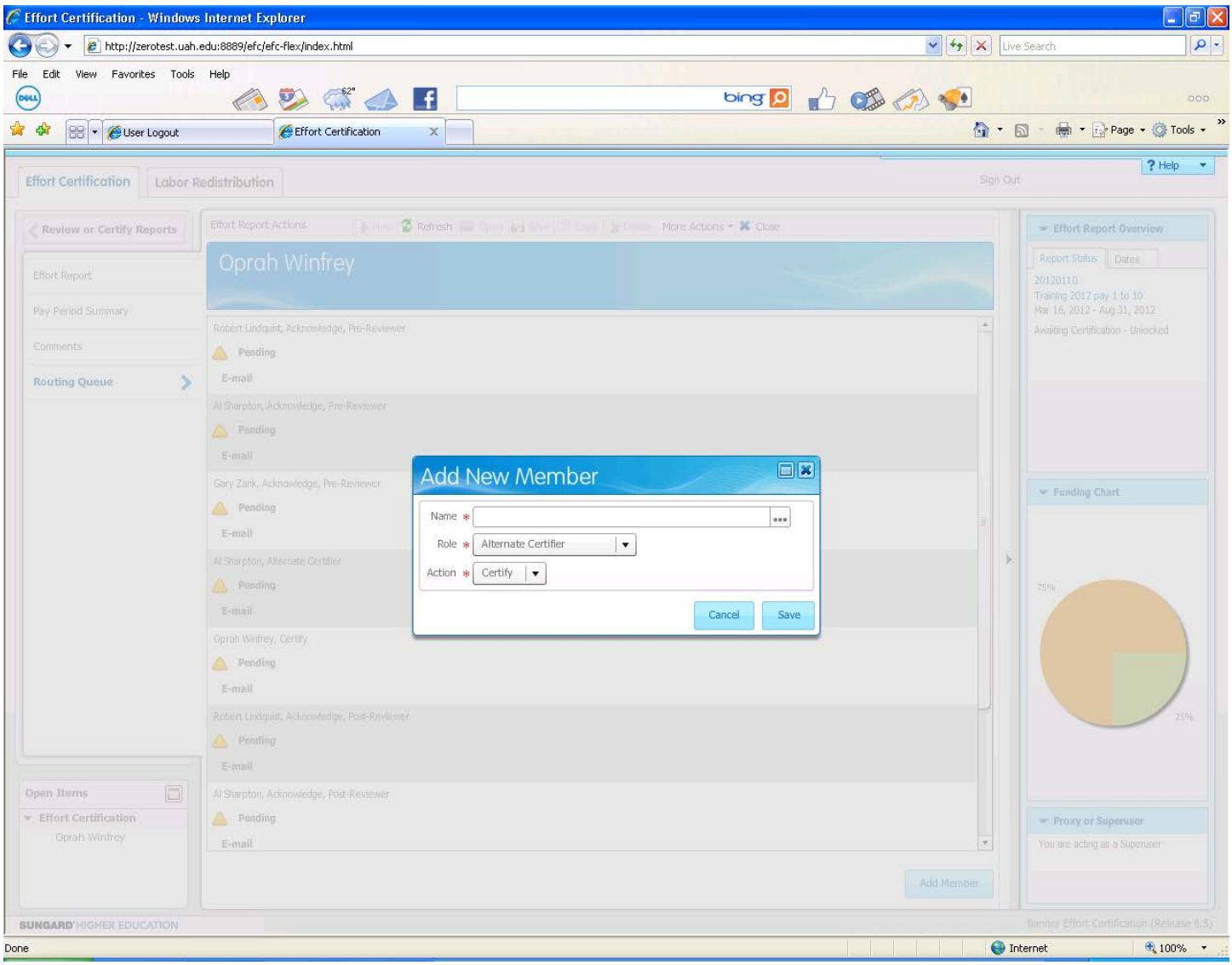

Notice there are only two pay periods for this report, because Oprah only worked two pay periods during the certification period. However, the report is still for 100% effort. This is to comply with OMB regulations. The distribution in the Effort Period Percent column shows how the distribution in the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

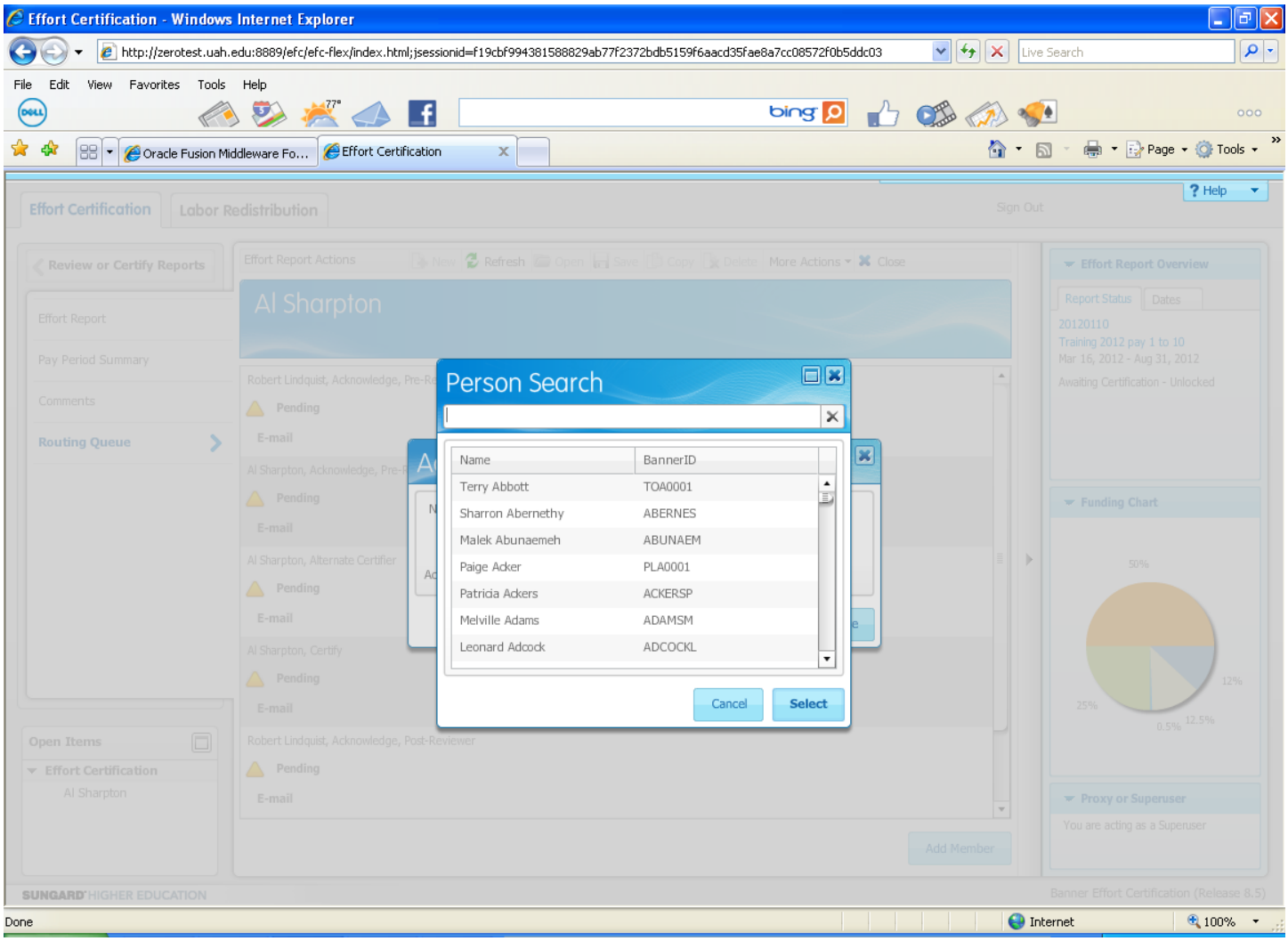



The Routing Queue of Oprah Winfrey shows Pre-reviewers and Post-reviewers of everyone with oversight of any account that Oprah charges. Also, the Alternate Certifier is the PI on Oprah's Research account.

- 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.)

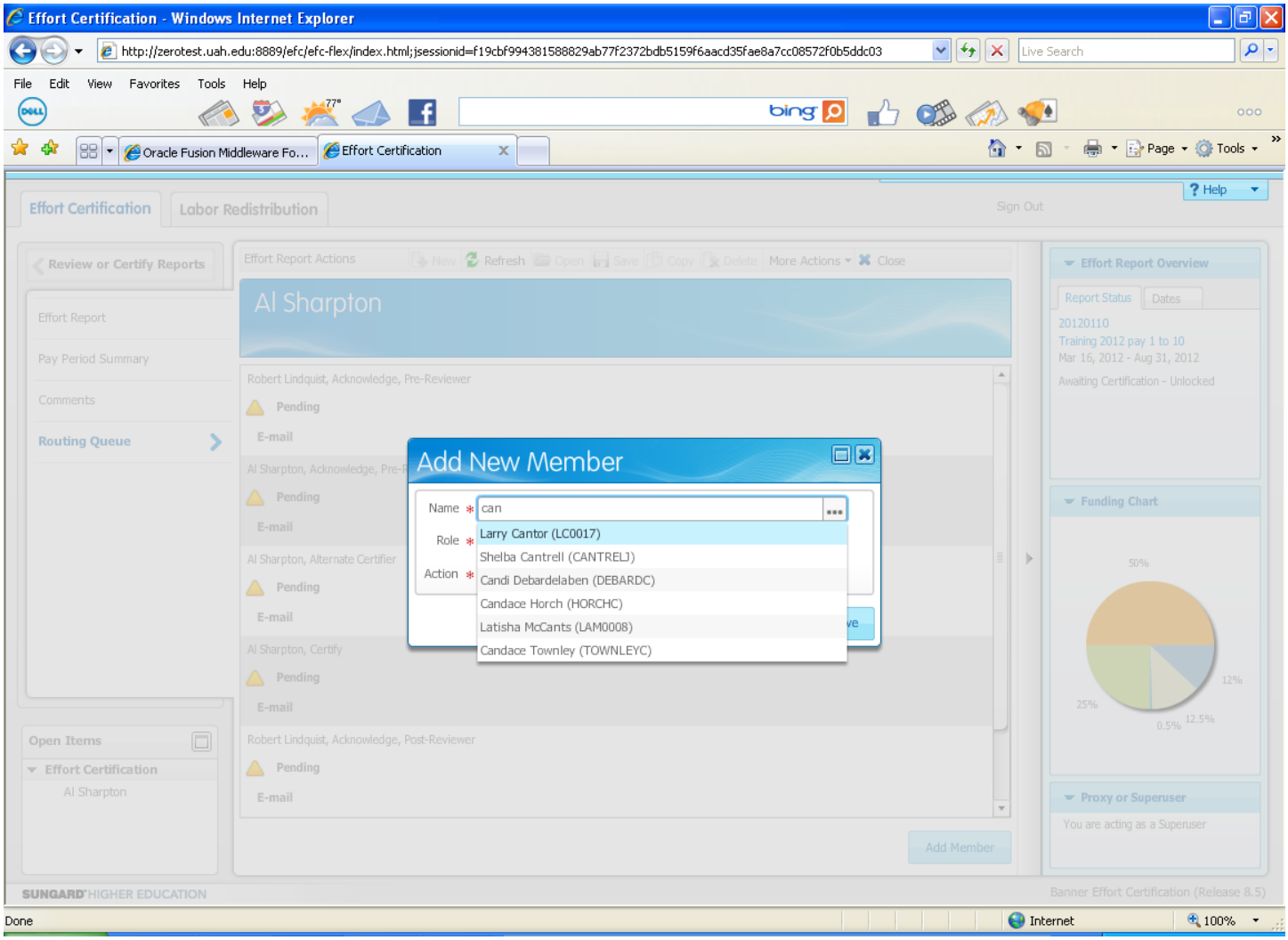

Effort Certification - Windows Internet Explorer
http://zerotest.uah.edu:8889/efc/efc-flex/index.html
File Edit View Favorites Tools Help
User Logout
Effort Certification
Page Tools
Effort Certification
Labor Redistribution
Sign Out
Help
Review or Certify Reports
Effort Report
Pay Period Summary
Comments
Routing Queue
Effort Report Actions
Refresh
More Actions
Close
Oprah Winfrey
Robert Lindquist, Acknowledge, Pre-Reviewer
Pending
E-mail
Al Sharpton, Acknowledge, Pre-Reviewer
Gary Zank, Acknowledge, Pre-Reviewer
Al Sharpton, Alternate Certifier
Oprah Winfrey, Certify
Robert Lindquist, Acknowledge, Post-Reviewer
Al Sharpton, Acknowledge, Post-Reviewer
Add New Member
Name *
Role * Alternate Certifier
Action * Certify
Cancel
Save
Open Items
Effort Certification
Oprah Winfrey
Add Member
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%

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



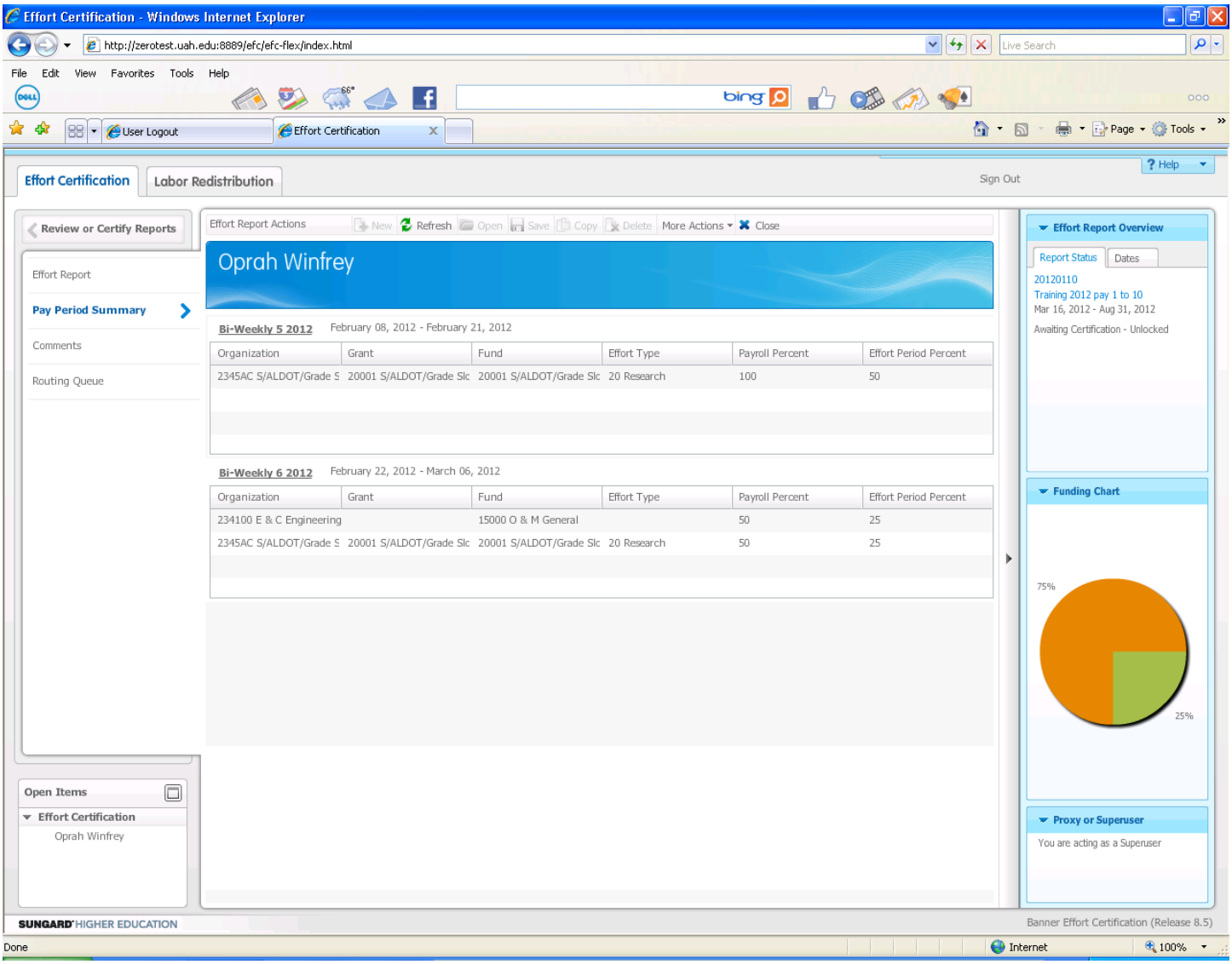

- Scroll through the names and click the **Select** button to make your choice.

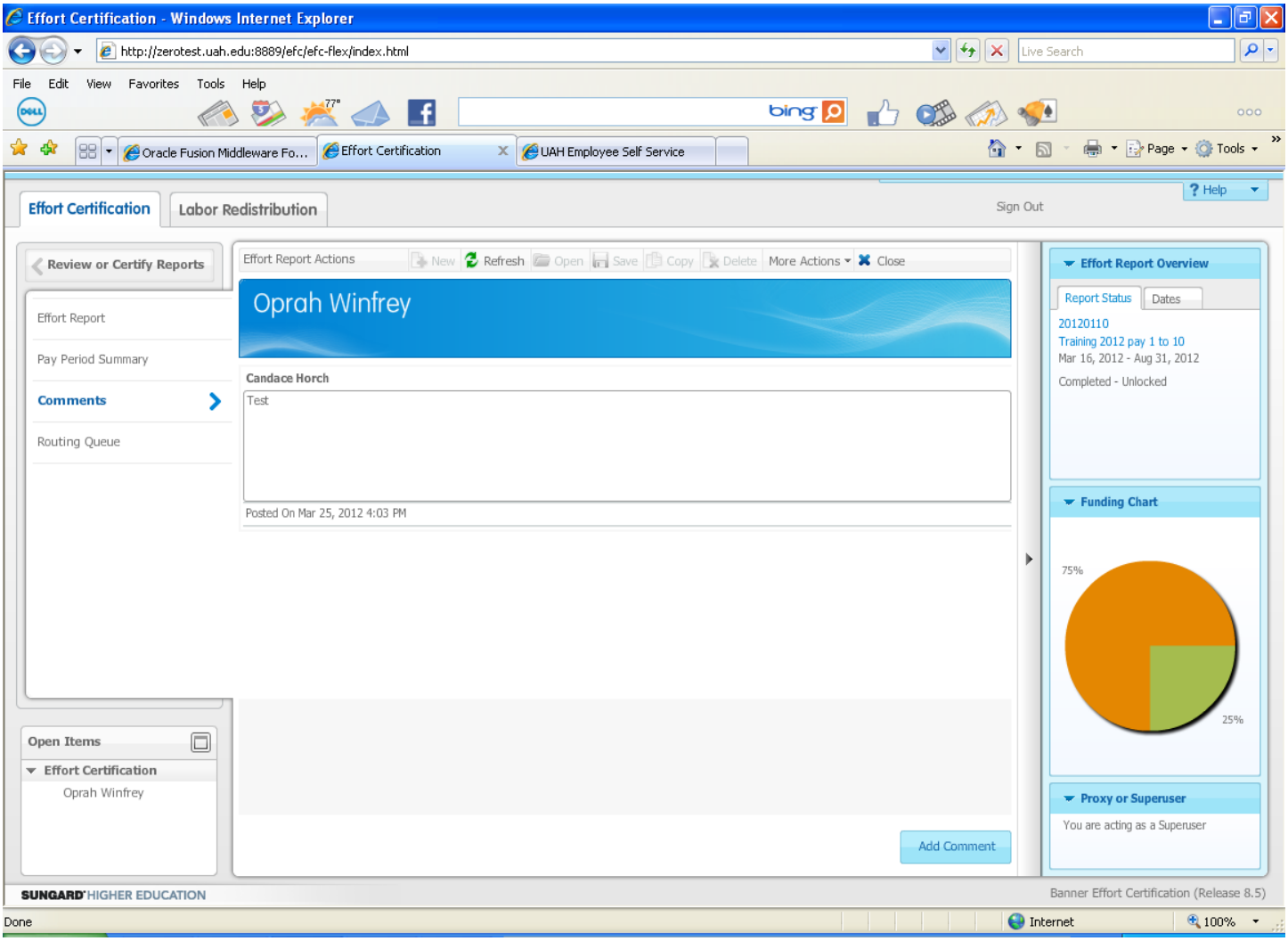
- You may also select a name by beginning to type a name in the name box. The program will try to anticipate your choice.



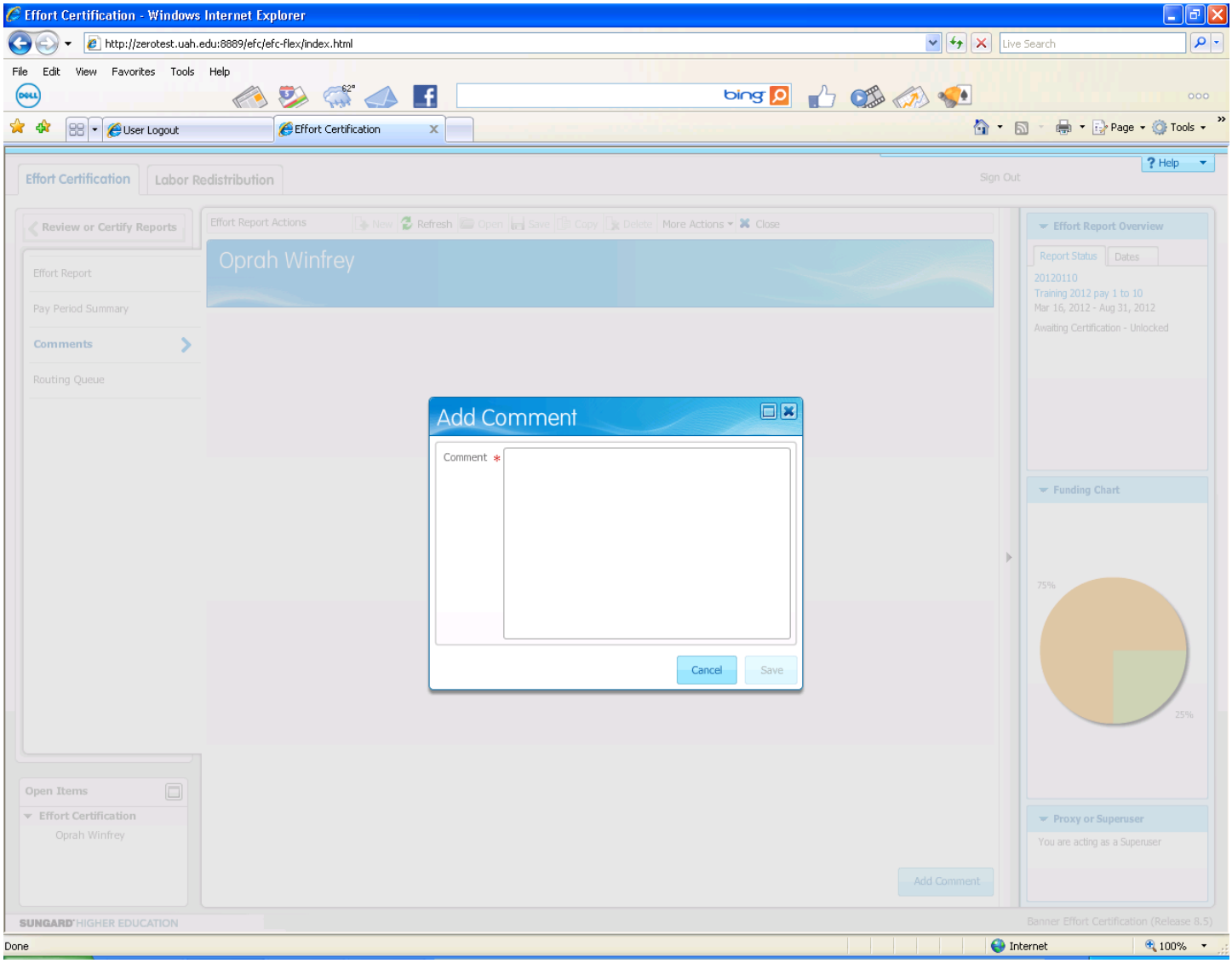

- Click the **Save** button to complete your selections.

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



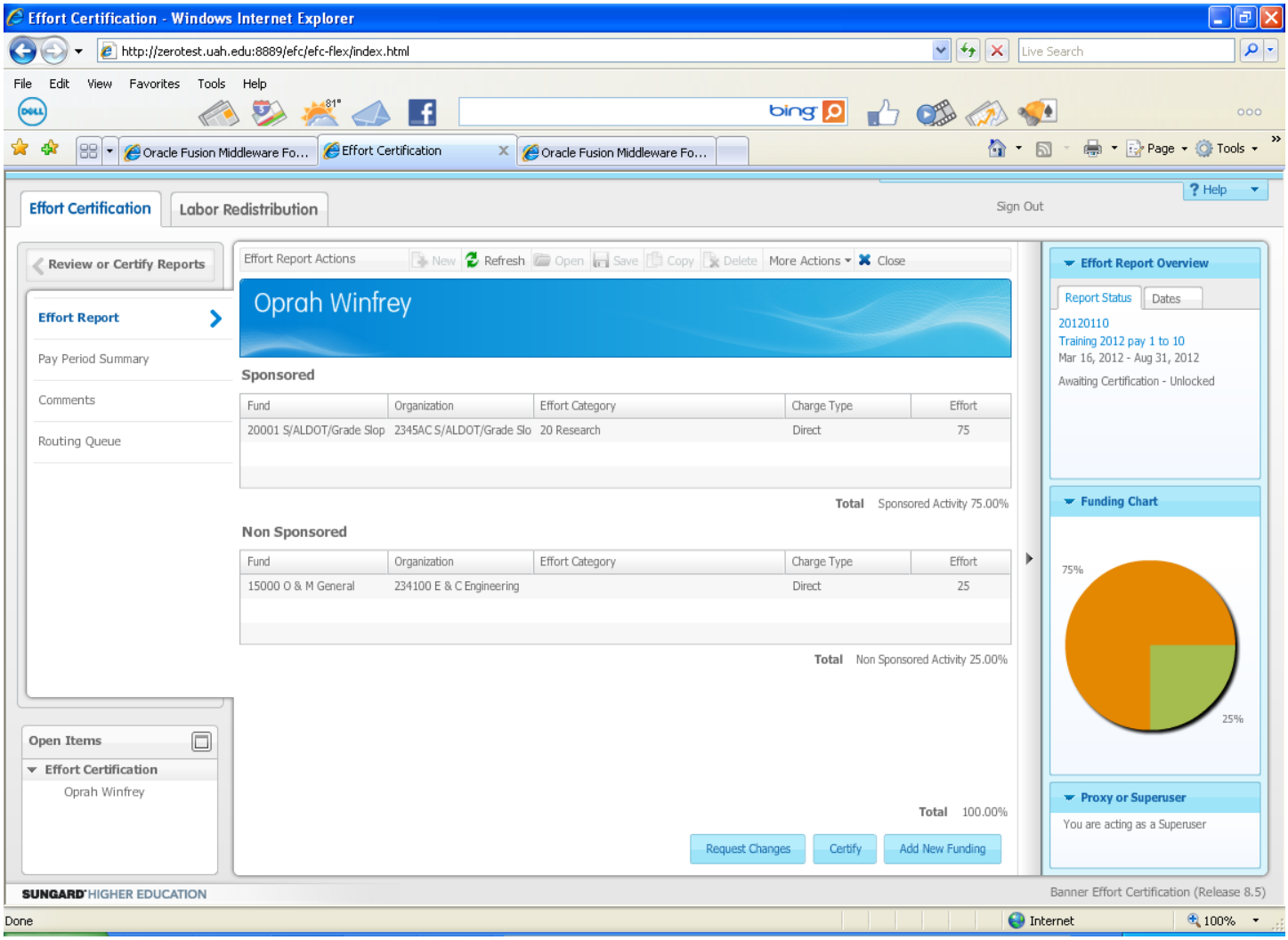



- Click on the **Add Comment** button in the lower right section of your screen.




- (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.

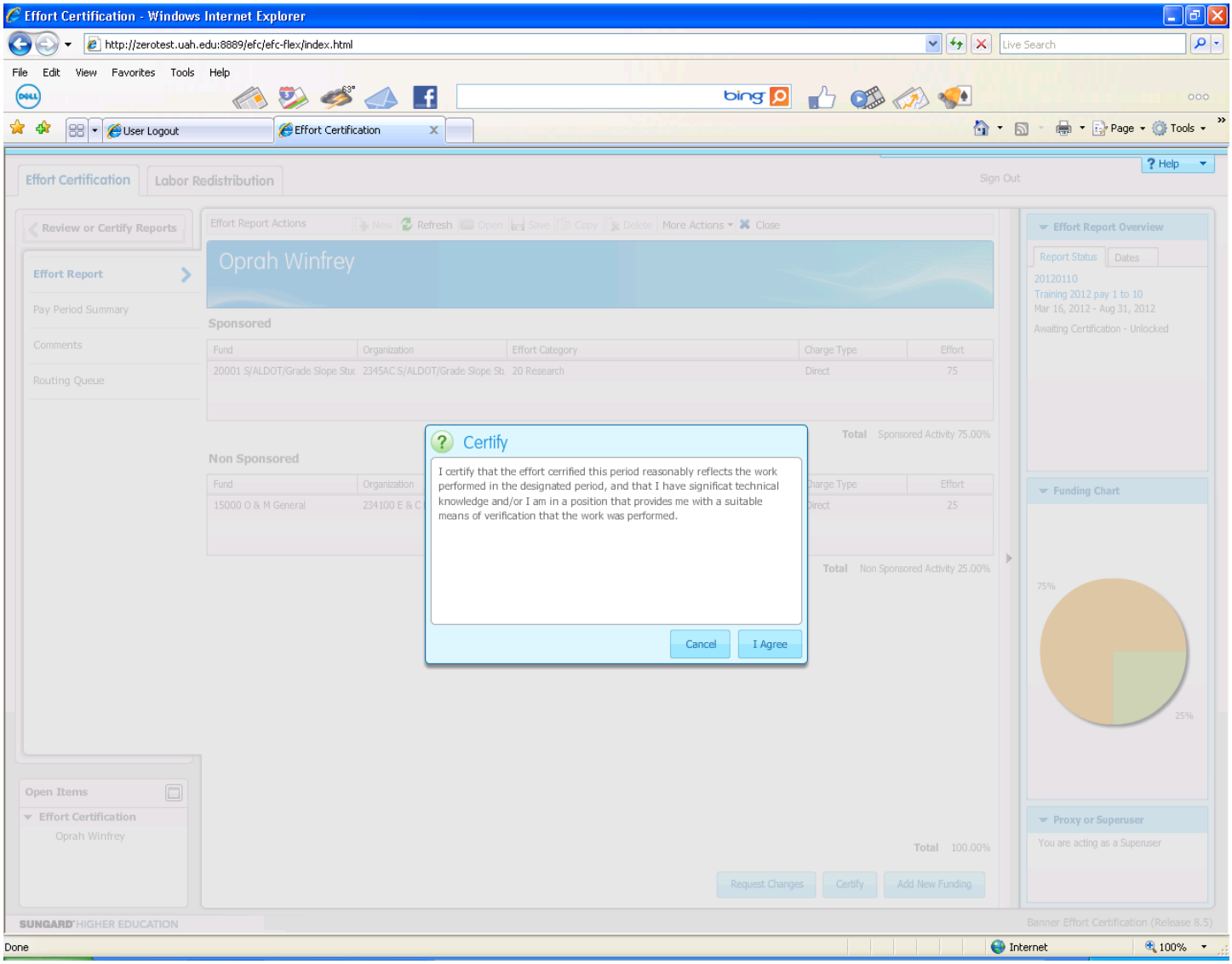
- If the Effort Report does not reflect your actual effort, please notify the Effort Reporting Officer and the person in your department responsible for originating Retros that your effort does not reasonably reflect your actual effort.



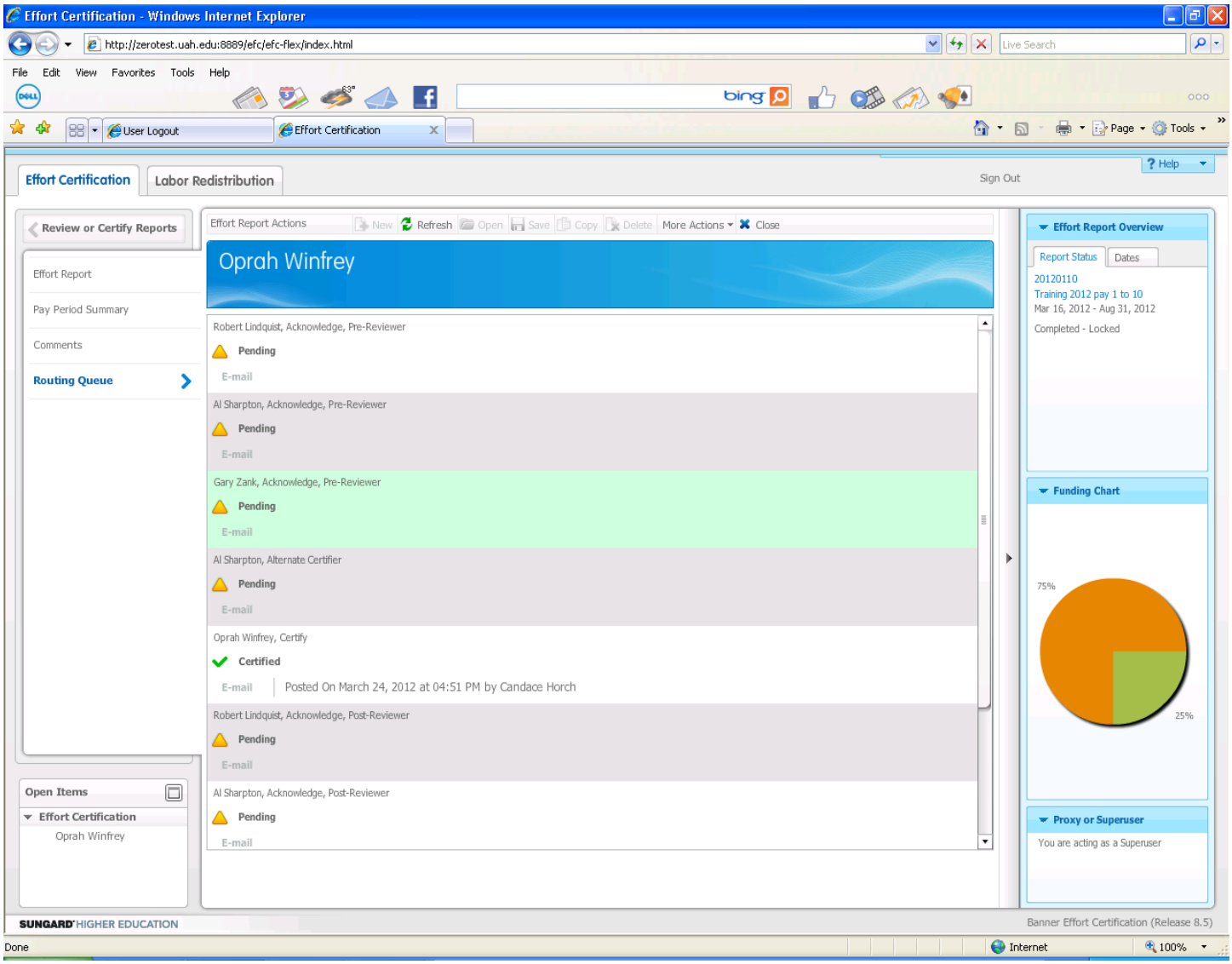

**Note: The Add New Funding and Request Changes buttons are disabled. Only authorized department employees are allowed to enter funding corrections through the Retro system.**

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

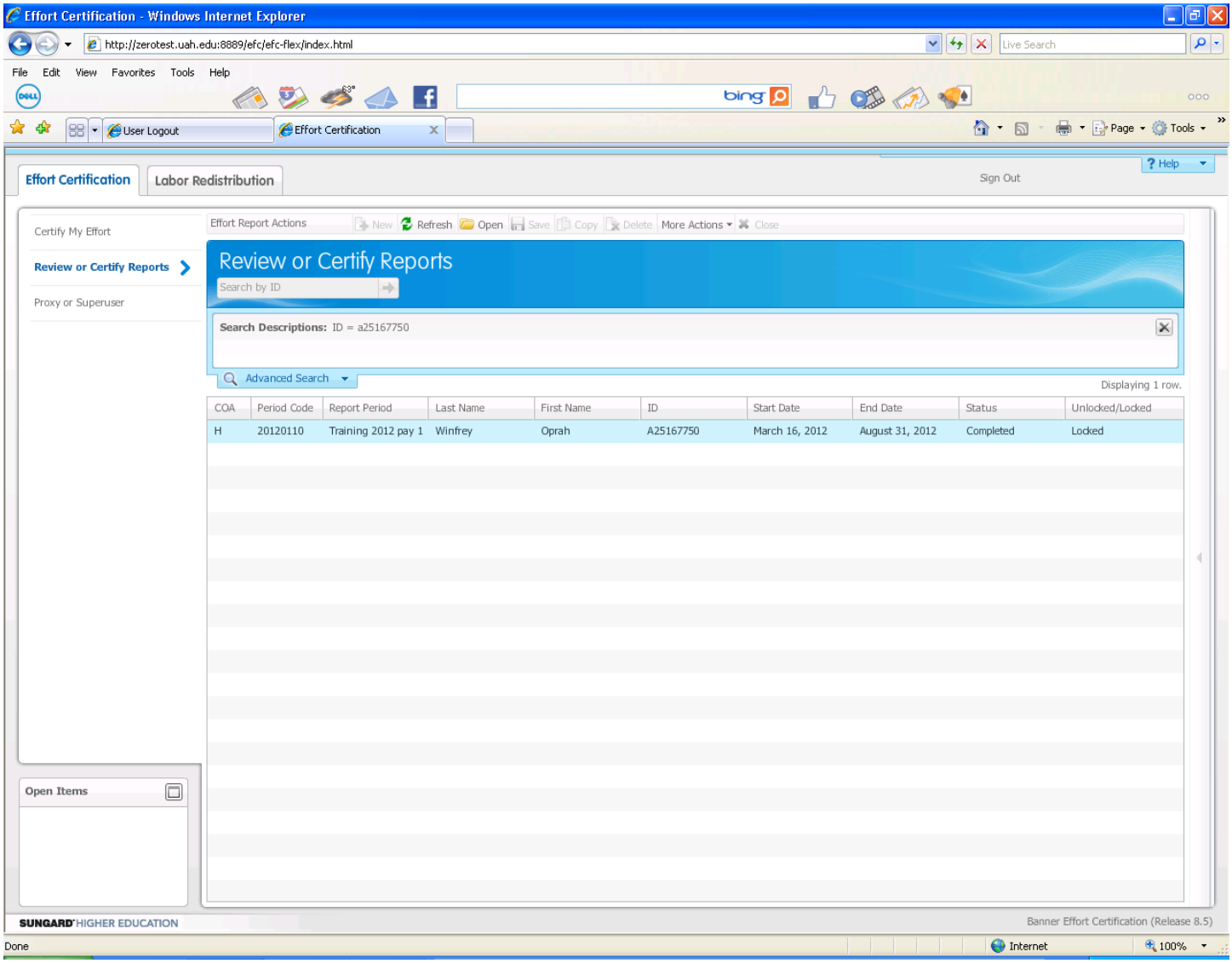
- Then click on the **I Agree** button after reading the certification statement.



- The Routing Queue will show who certified and when.

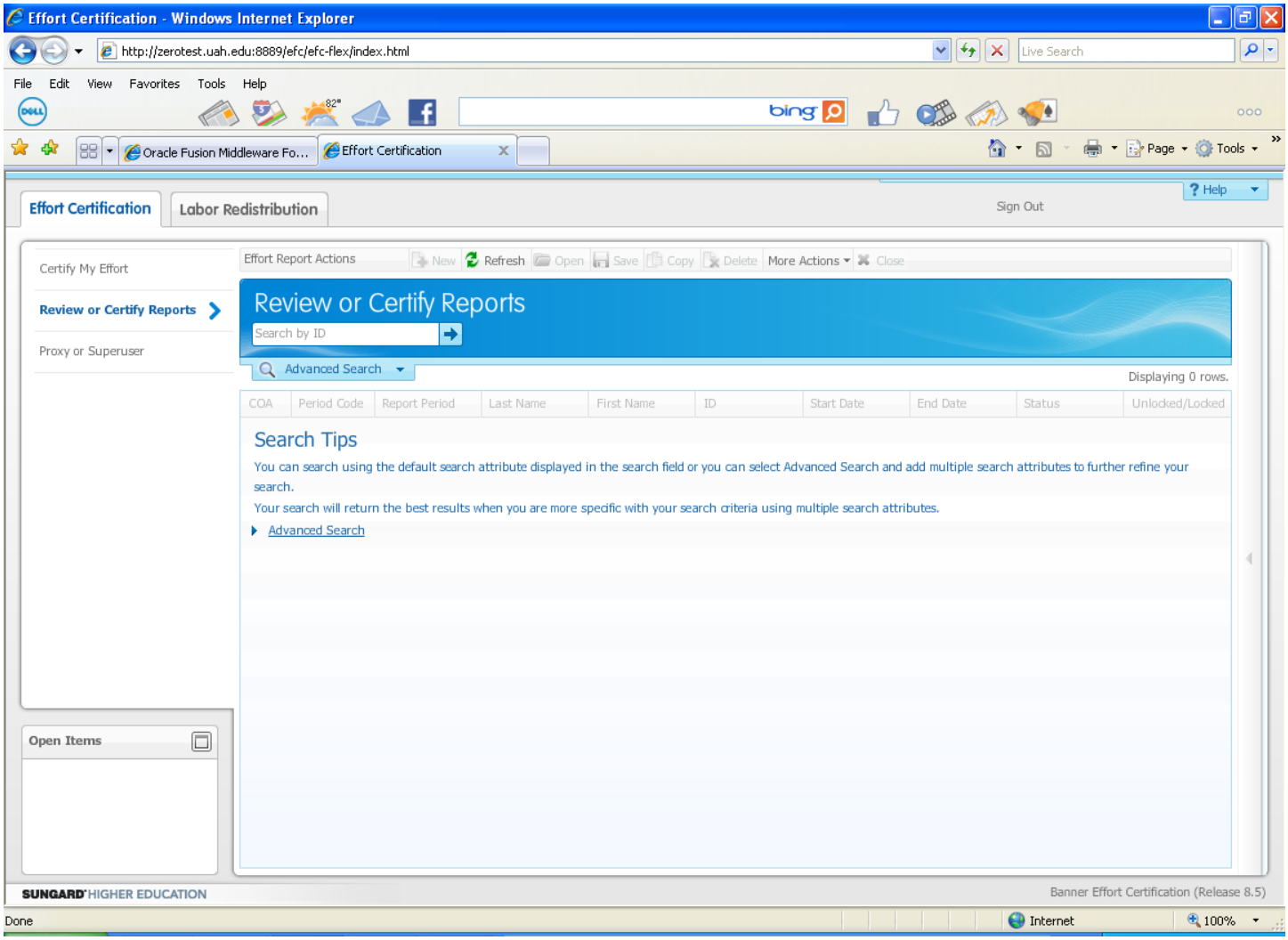


- After you close the report using the blue **X Close** Icon, you will see that the report is locked. You will not be able to unlock it to request additional changes. If you certified by accident, contact the Effort Reporting Officer for assistance. However, you may access the information for review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

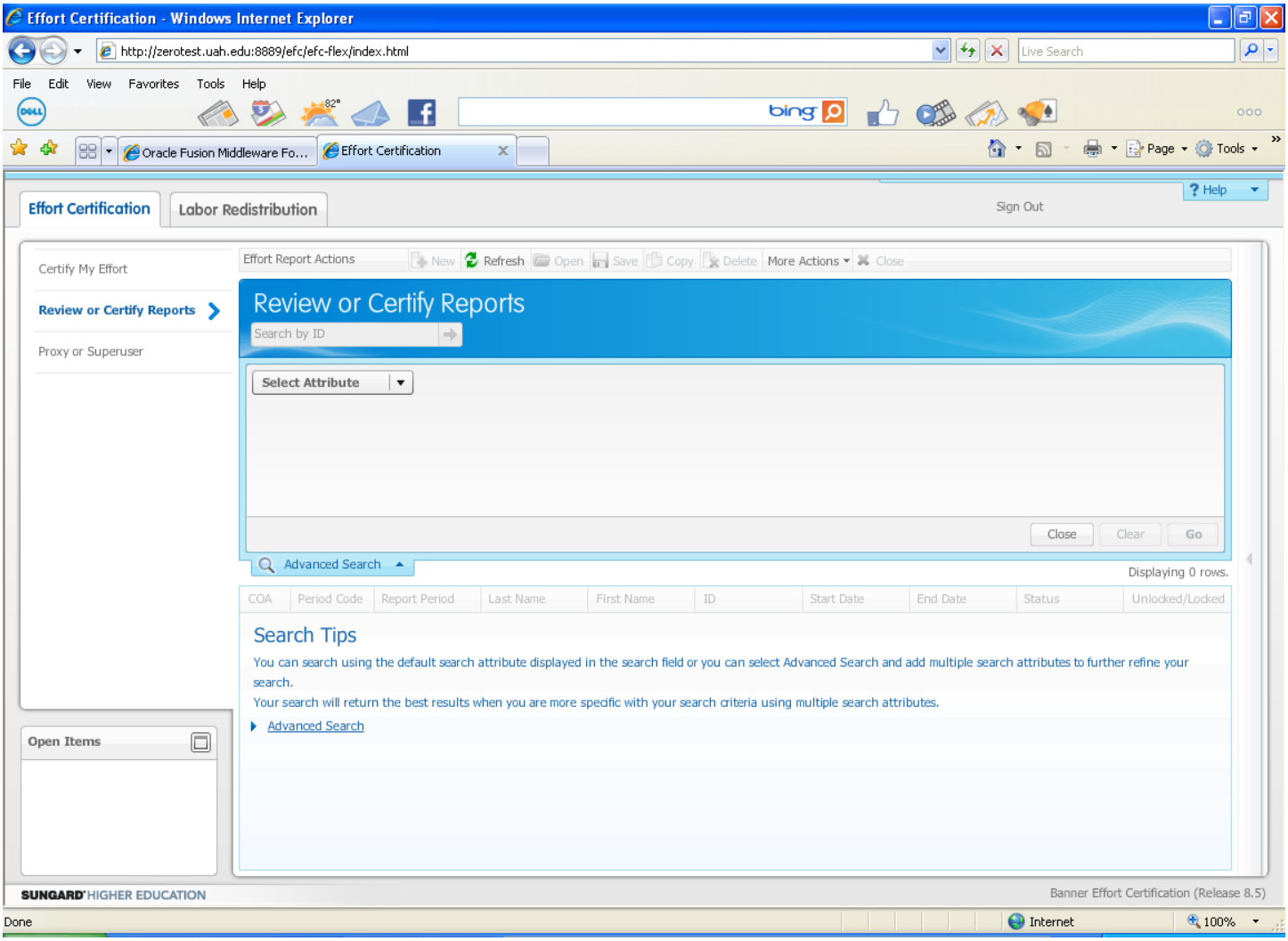


**Method Two for PIs and Financial Managers:** (PIs are required to certify for their GRAs.)

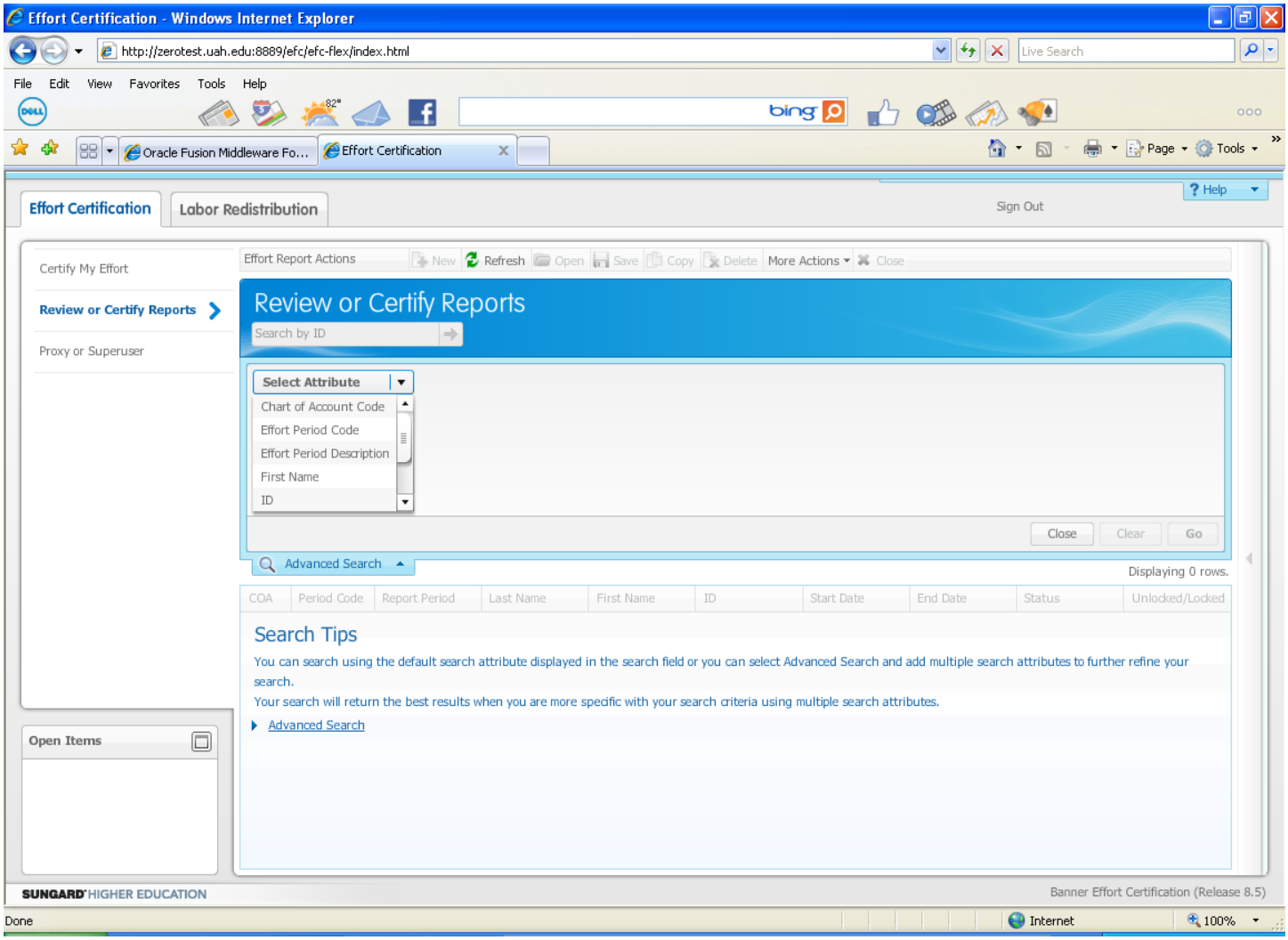
- Click on **Review or Certify Reports.**
- Click on the drop-down arrow on the **Advanced Search** tab.



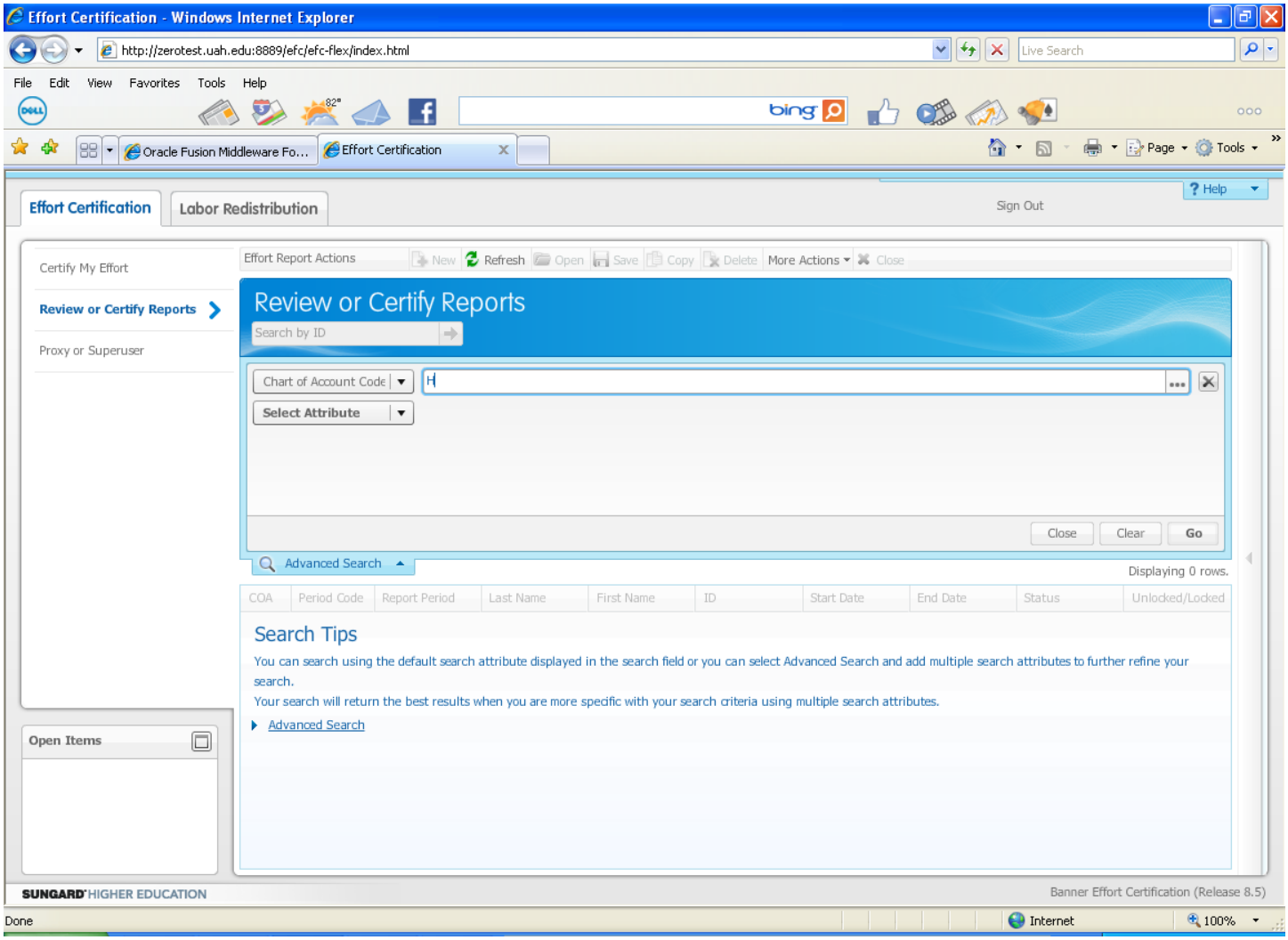
- Click on the drop-down arrow on the **Select Attribute** tab.



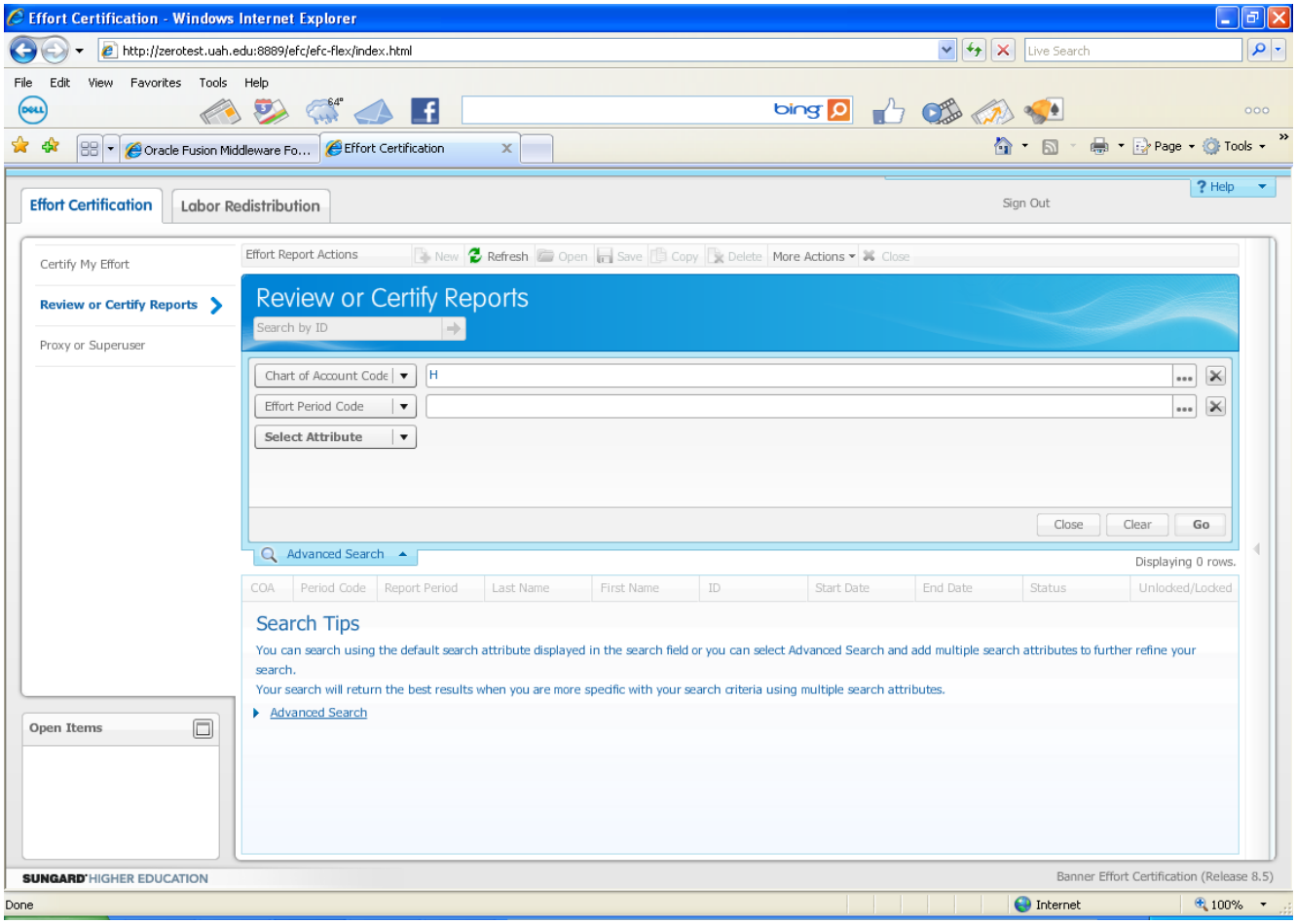
- Click on **Chart of Account Code** field.



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

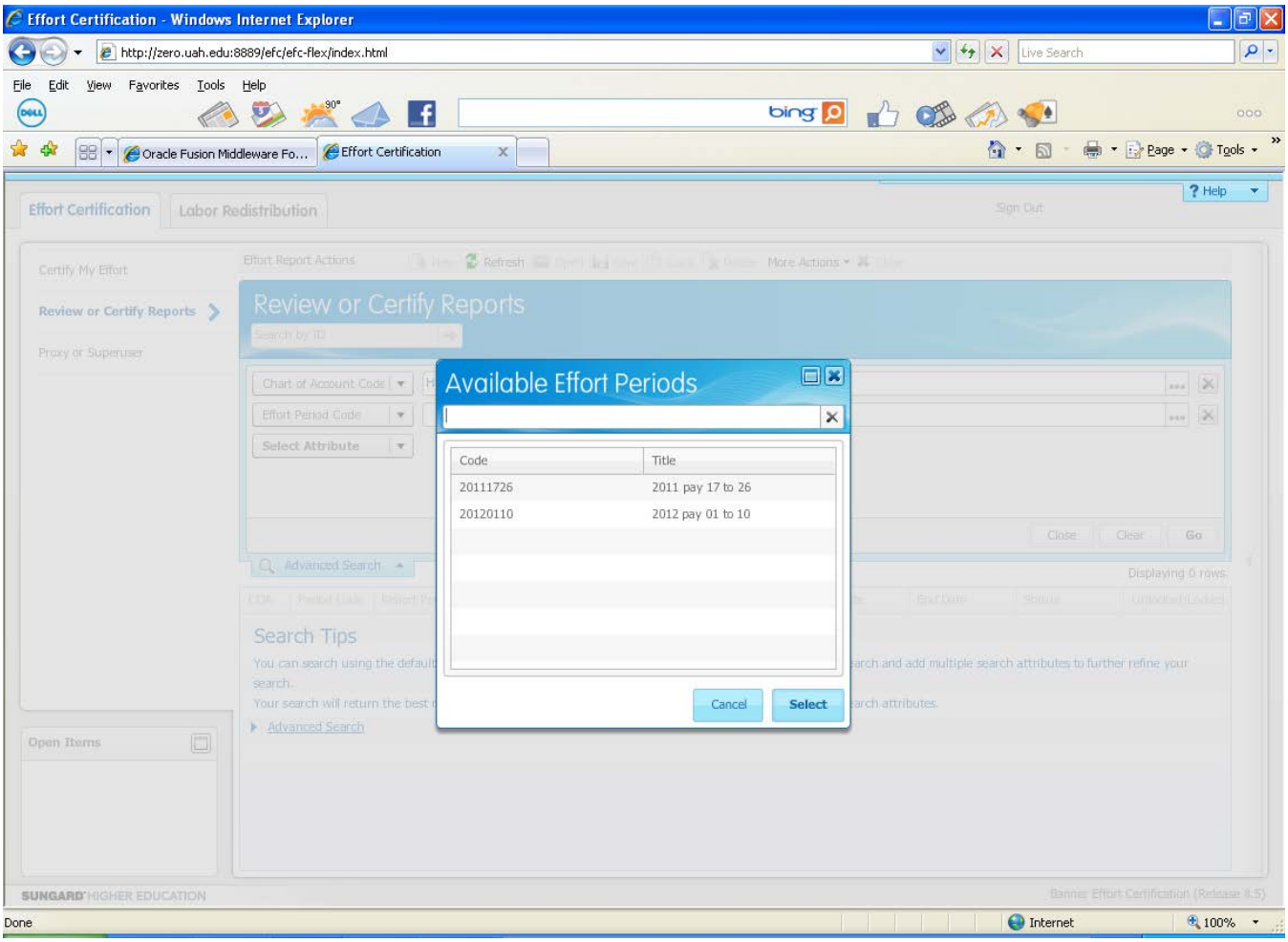


- Select the **Effort Period Code** attribute.

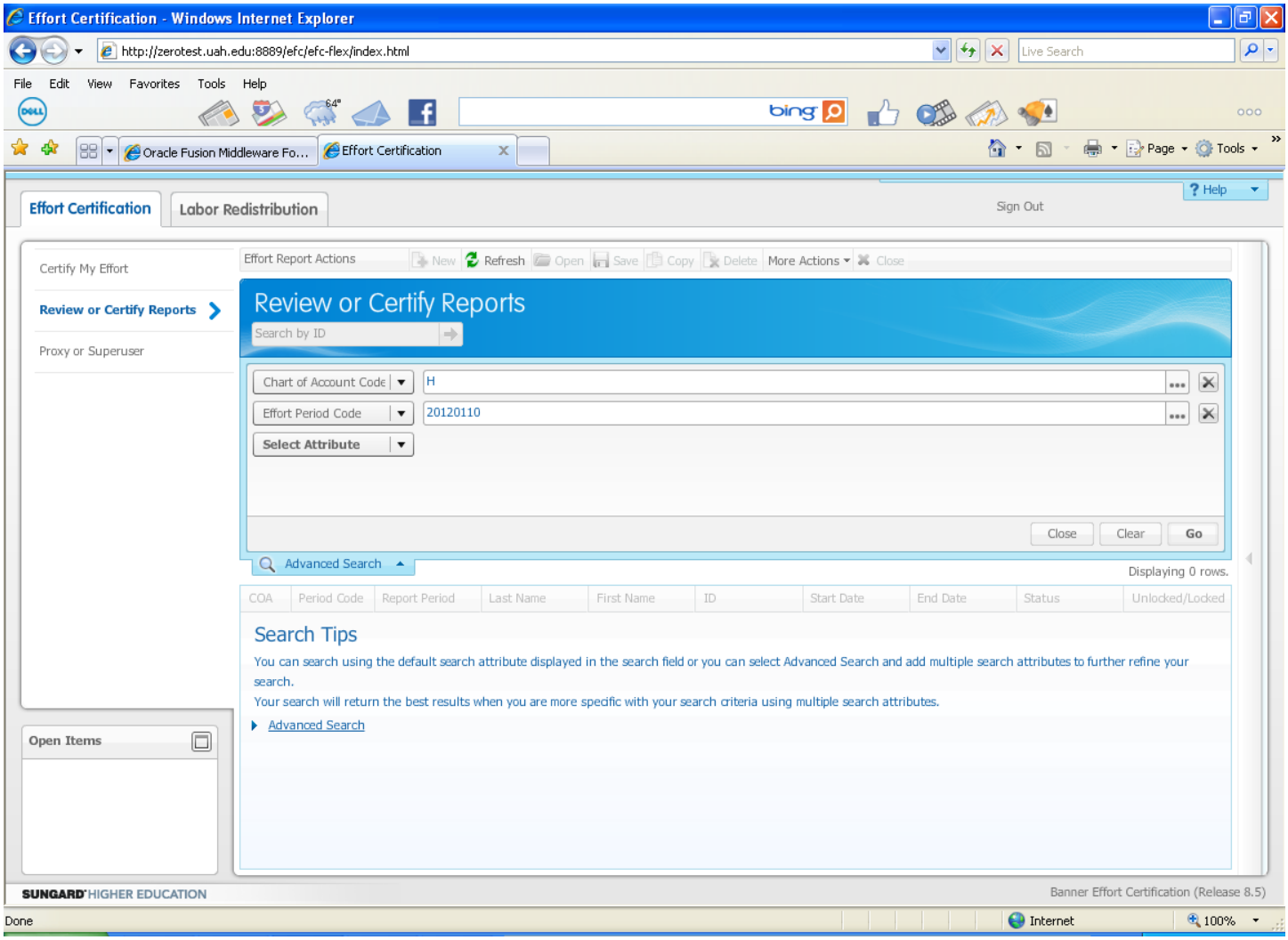



- Select the Effort Period code using the drop down box **(…)** on the right of the field.

- 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.

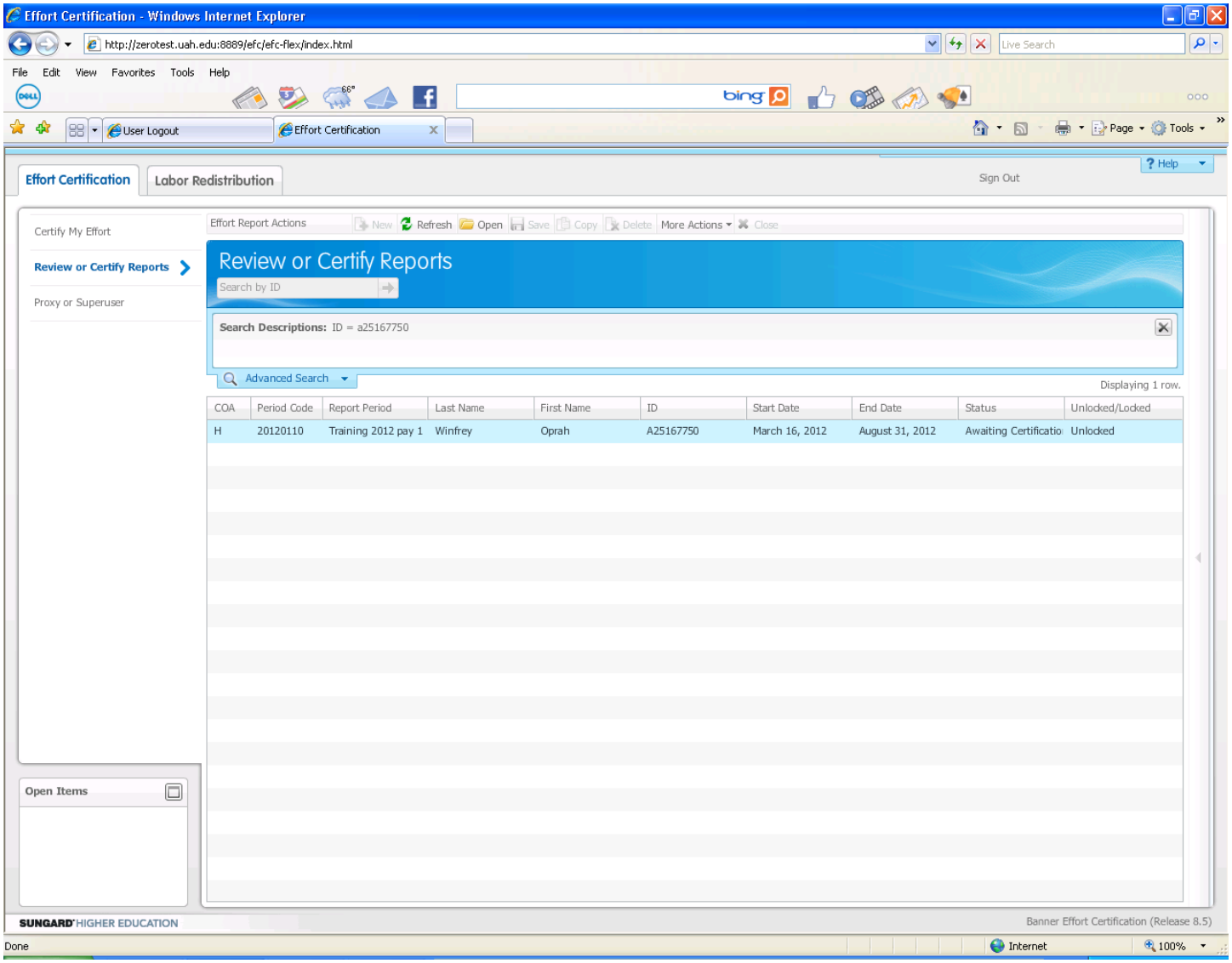


Use the **Clear** button at the bottom of the Attribute area to remove all your selected search criteria attributes.
Use the **X** icon at the right of the attribute field to remove individual attributes.
Use the **Close** button at the bottom of the Attribute area to close the attribute window.




- 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.**

**Tammy Thornton**
**SKH 165**
**256-824-2290**
**Trt0004@uah.edu**