

Peoplesoft Effort Certification

Participant's Manual

Version 1.3.7
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TRAINING AGENDA

TOPIC
INTRODUCTION
LEARNING OBJECTIVES
MODULE 1: WHY COMPLETE EFFORT REPORTS
MODULE 2: HOW TO COMPLETE EFFORT REPORTS
MODULE 3: DIFFERENT SCENARIOS
MODULE 4: PREPARING TO TRAIN

Course Overview

Field	Description
Audience	<p>This course is for any of the following end users of the PeopleSoft system:</p> <ul style="list-style-type: none"> ▪ Persons identified as trainers to teach the PI how to electronically certify effort reports ▪ Principle Investigators on active grants
Prerequisites	<p>A basic knowledge of computers is required. You need to be familiar with using a web-browser to browse web-pages. An accounting background may prove useful, but is not necessary for using PeopleSoft for different accounting functions. No other experience is required.</p>
What is covered in this Class?	<p>The purpose of this course is to provide basic knowledge on how to certify effort reports in PeopleSoft.</p> <p>After completing this course, you will be able to:</p> <ul style="list-style-type: none"> ▪ Principle Investigators will be able to use this documentation to certify effort reports for Fall/Spring Semesters. ▪ Access and understand the sections PS Finance for purposes of certifying effort reports. ▪ Navigate PeopleSoft menus and individual screens related to Effort Reports. ▪ View data in PeopleSoft pertinent to effort reporting. <p>Hands-on practice will be combined along with the demonstration of certifying effort reports in PeopleSoft.</p>
Length	<p>The length of this course is up to 2hours.</p>

Introduction

PeopleSoft is a web-based application that is used to store and process UMBC's data resources. It provides a large suite of integrated software applications that manage data and communications for human resources, accounting and finance systems. The PeopleSoft system provides us with accurate, timely information ensuring sound business recommendations and decisions. This will ultimately enable us to serve all our clients (internal and external) better.

Learning Objectives

The purpose of this course is to provide knowledge on how to certify effort reports in PeopleSoft, along with information and tools to effectively navigate and find information in PeopleSoft.

After completing this course, you will be able to:

- Identify tools necessary for the PI to be successful
- Access and understand your Effort Reports in the database.
- Navigate PeopleSoft menus and individual screens necessary to certify effort reports.
- View data in PeopleSoft using search features, reports and inquiries.

Module 1: Why Complete Effort Reports

The purpose of this module is to inform you of the reasons for completing Effort Reports.

At the end of this module, you will know:

- Who is required to complete effort reports
- Why effort reports must be completed
- What information is included in an effort report
- How are they currently being done?
- When are effort reports due?
- Consequences of not completing effort reports

Who is required to complete effort report?

Government regulations, set by the Office of Management and Budget (OMB) in Circular A-21 "Cost Principles for Educational Institutions" states for professorial and professional staff, the reports will be prepared each academic term, but not less frequently than every six months. For other employees, unless alternate arrangements are agreed to, the reports will be prepared no less frequently than monthly and will coincide with one or more pay periods.

Why effort reports must be certified:

Government regulations, set by the Office of Management and Budget (OMB) in Circular A-21 "Cost Principles for Educational Institutions" require that the University maintain records that will substantiate the effort of each individual charged to a sponsored project. Therefore, time records must be carefully maintained. A-21 states that the payroll distribution system will (i) be incorporated into the official records of the institution, (ii) reasonably reflect the activity for which the employee is compensated by the institution, and (iii) encompass both sponsored and all other activities on an integrated basis. Of the options available for documentation, according to A-21, the After-the-Fact Activity Records Method has been determined to be the method most easily adaptable to the Campus environment.

What information is included in an effort report?

- Reporting period.
- Chartfields.
- Total period salary.
- Sponsored
- Non-Sponsored
- Percent of total salary.

How are they currently being certified?

- Business manager's print the effort report
- Business Manager then gives them to the PI for verification and approval
- PI signs and certifies the effort report
- The Business Manager sends the effort reports to Contracts and Grants to act as the PI and certify the effort reports

When are effort reports due?

- January 30 - Fall Pay Period 1 – 14
- August 30 - Spring Pay Period 15 - 26

Note: This process could take weeks. By the time the process is finished the distribution can sometimes change

Consequences of not certifying effort reports.

- Loss of Government funding
- Sponsor can request funding to be returned
- Auditors determining the expenses are unallowable

Module 2: How to Complete Effort Reports

This module will teach you the steps required to electronically certify effort on a Grant using PeopleSoft.

At the end of this module, you will be able to:

- Know what information is required prior to certifying effort on a Grant.
- Locate Effort Reports assigned to a specific Principal Investigator
- View an Effort Report.
- Research an individual's percentage of effort.
- Complete and finalize an Effort Report.
- Certify and **SAVE**.
- Print the Master Report Listing.

Supporting Documentation needed for Certifying Effort Reports:

The following is needed to certify effort on a Grant. You may need to bring the following documentation to assist you.

1. All grant research agreement letters and Award Information Sheets for which you, are the PI and have exerted effort for the time frame of _____ to _____.
 - You may have not received a salary from an award during this time frame, but if the grant life falls within the above time frame and you have effort bring that award information with you.
2. Names of Graduate Assistant budgeted and paid on the above grants during this above period
3. Names of Faculty budgeted and paid from the above grants during this period
4. Any awards that you are the PI in another dept at UMBC, with the name of the contact for the department.

How to get the necessary Information:

- Navigation to Payroll Report
Payroll Reporting – Payroll Report Search
- Proposal with budget as submitted to Sponsored Programs including percentage of effort

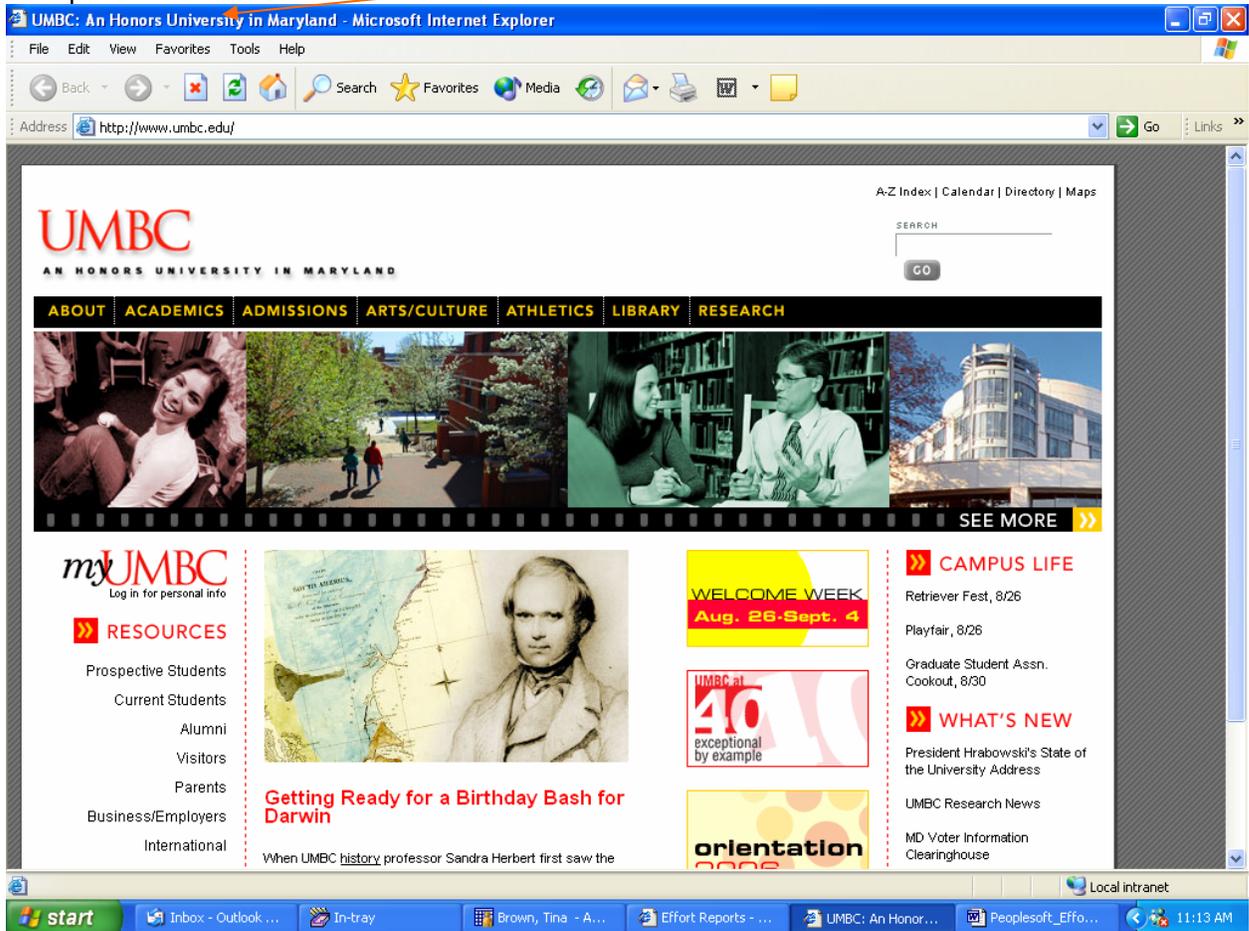
You need to have access to Peoplesoft FS to certify effort reports
You need to be a PI on the grant to certify effort reports

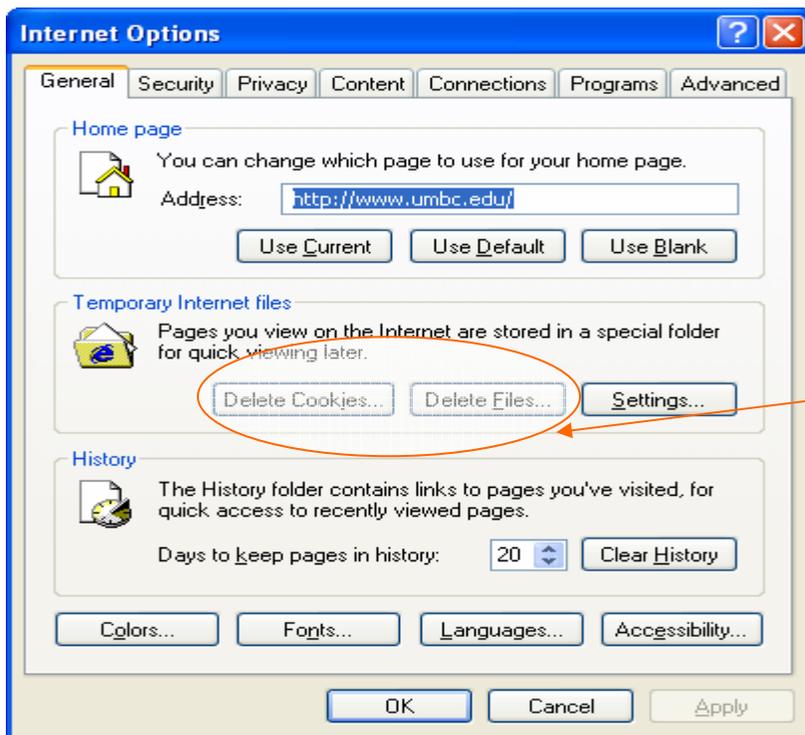
Accessing PeopleSoft

If you only certify effort reports every six months you should perform step 1 below.

To access PeopleSoft, follow these steps;

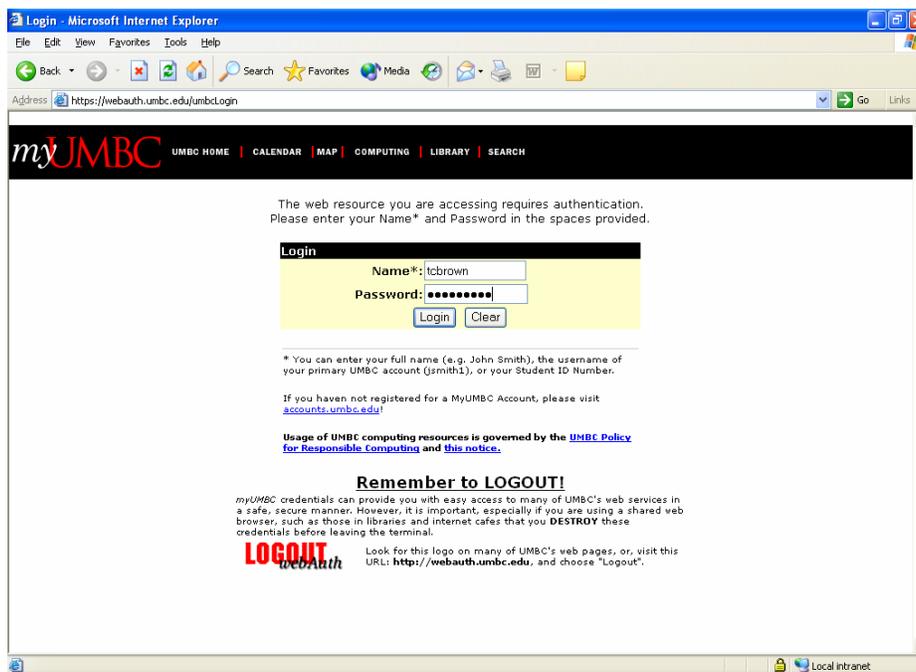
1. Clean the cache files. Open Internet Explorer. Click Tools – Internet Options on the menu option.



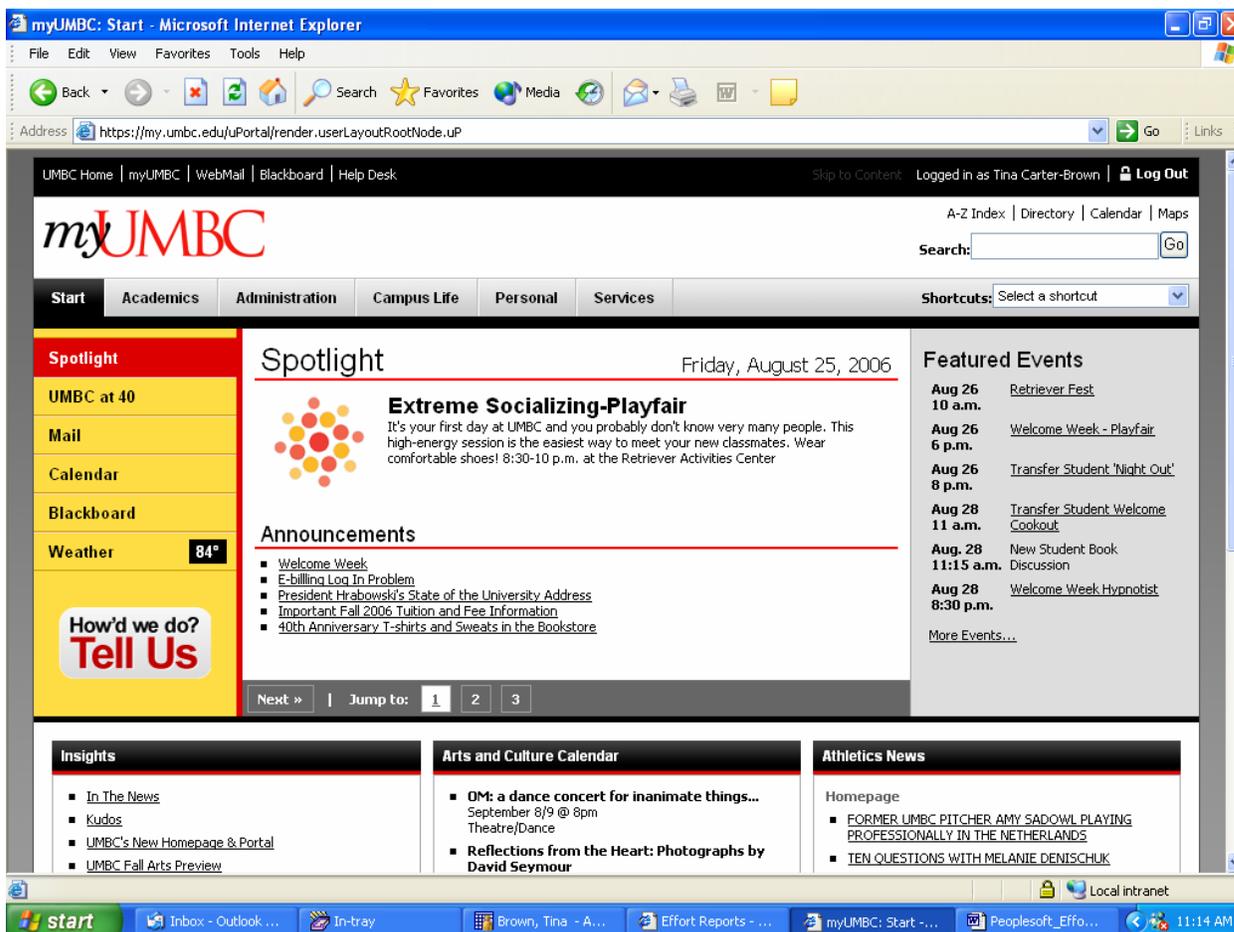


Click Delete Cookies
Click Delete Files

- Go to myUMBC, by entering the URL <http://my.umbc.edu> or clicking on myumbc on the UMB. The following screen is displayed.

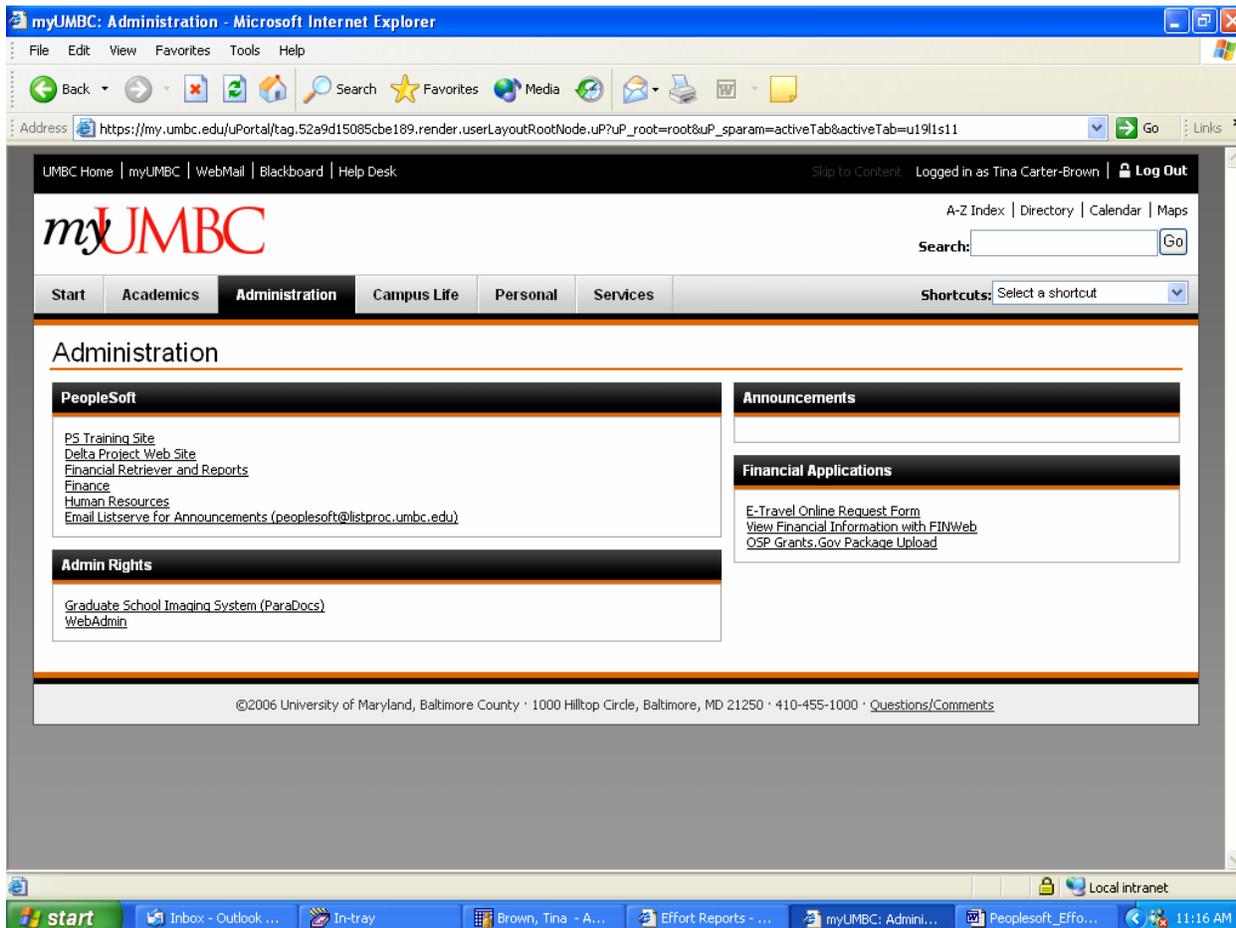


3. Enter your UserID in the Name field.
4. Enter your Password, and click on the **Login** button. You are taken to the myUMBC home page.



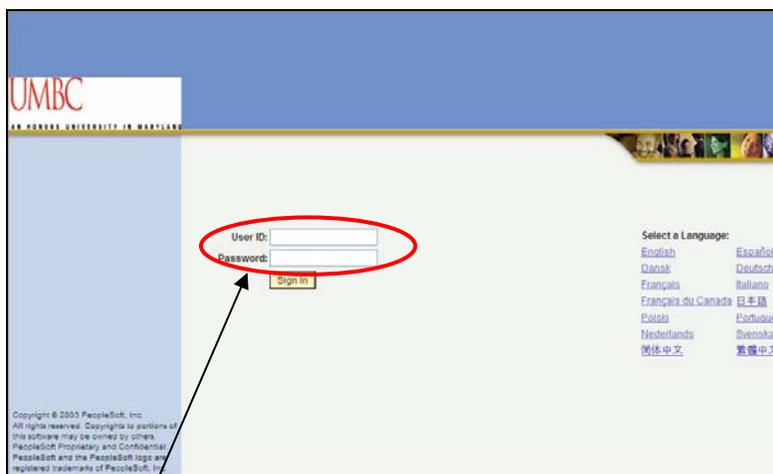
My UMBC HOME PAGE

5. Select the **Administration** tab.

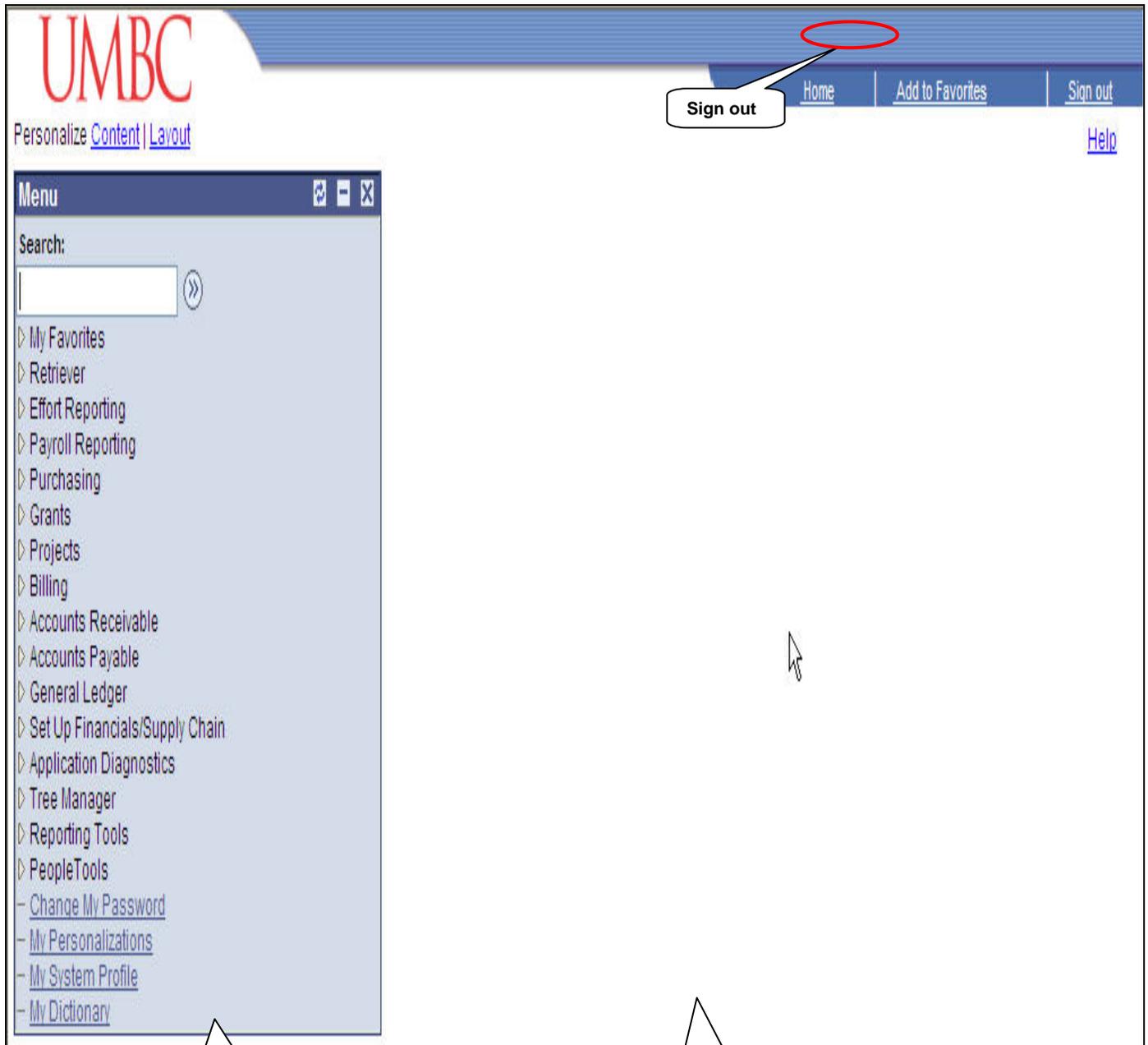


ENTER SCREEN CAPTURE OF MYUMBC Services TAB.

- Click on the Finance link. The PeopleSoft Finance login page is displayed.



- Enter your **User ID** and **Password** in the fields provided.
- Click the **Sign In** button. The Home Page for the finance database will appear.



The screenshot shows the UMBC system interface. At the top left is the UMBC logo. Below it are links for "Personalize Content" and "Layout". On the right side of the top bar, there are buttons for "Home", "Add to Favorites", and "Sign out". A red circle highlights the "Sign out" button, with a callout box containing the text "Sign out". Further right is a "Help" link. On the left side, there is a "Menu" window with a search box and a list of items: My Favorites, Retriever, Effort Reporting, Payroll Reporting, Purchasing, Grants, Projects, Billing, Accounts Receivable, Accounts Payable, General Ledger, Set Up Financials/Supply Chain, Application Diagnostics, Tree Manager, Reporting Tools, PeopleTools, Change My Password, My Personalizations, My System Profile, and My Dictionary. A mouse cursor is visible in the main display area.

Menu: left navigation pane.

Results/Information display space.

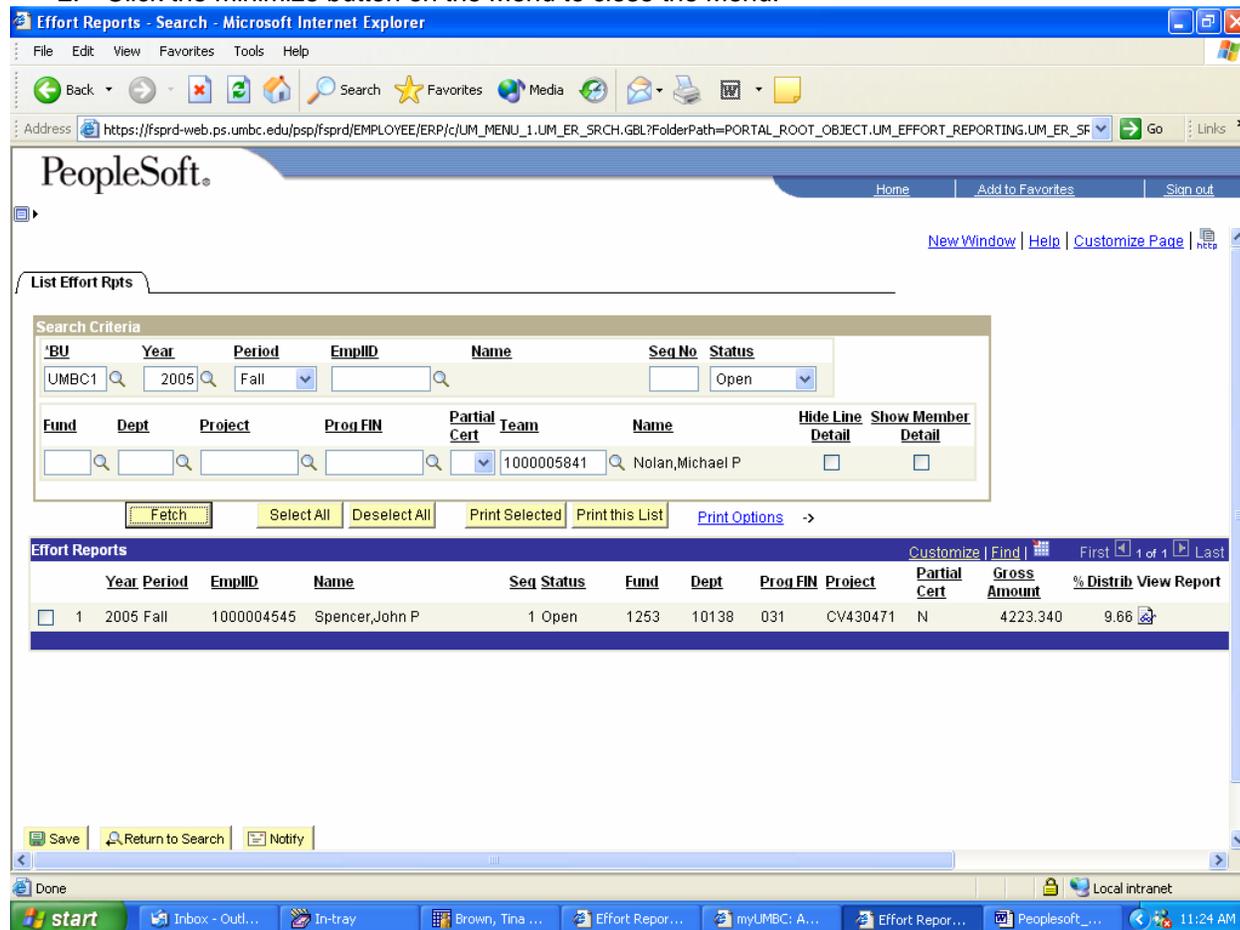
Navigating to Effort Reports



- To access Effort Reports, follow this navigation from the main menu in PeopleSoft Finance:
Effort Reporting → Effort Reports – Search

The Effort Reports Search page is displayed. The first time you will have to enter *BU = UMBC1, it will automatically populate the next time.

- Click the minimize button on the Menu to close the Menu.



Search Criteria

'BU'	Year	Period	EmplID	Name	Seq No	Status
UMBC1	2005	Fall				Open

Fund	Dept	Project	Prog FIN	Partial Cert	Team	Name	Hide Line Detail	Show Member Detail
					1000005841	Nolan, Michael P	<input type="checkbox"/>	<input type="checkbox"/>

Effort Reports

Year	Period	EmplID	Name	Seq	Status	Fund	Dept	Prog FIN	Project	Partial Cert	Gross Amount	% Distrib	View Report
1	2005	Fall	1000004545	Spencer, John P	1	Open	1253	10138	031	CV430471	N	4223.340	9.66

From the Search Page, you narrow the reports that you will select by entering data in the various fields provided on the search page. You can choose to enter as few or as many search parameters as you wish. **The recommended search parameters include Year, Period, Status, and PI/Team Member.**

3. In the Year field, enter the Semester Year to search.
4. In the Period field, enter the Period (Fall PP 1-14/Spring PP 15-26),
5. Select the Open Status you desire.
6. Enter the Y/N from the Partial Cert drop down box. (Y = Yes Partially Certified, N = Not Partially Certified)
7. Enter the PI employee ID in the PI/Team Member field. If you do not know the employee ID, use the search icon (magnifying glass) to locate the appropriate data.
8. Click the Show Member Detail box – if want the PI name in the data.
9. Click **Fetch**

NOTE:

Only Effort Reports that have a status of Open or Ready can have information changed at the row level. Effort Reports marked Old Seq No or Old X Seq are rows that were previously Finalized (Old Seq No) or previously Canceled (Old X Seq) and a retro-pay transaction has subsequently been processed. Newer Sequences exist for these employees, and these old rows cannot be modified.

View Report

- After entering the search criteria, and selecting Fetch, the list of effort reports that meet your search criteria is displayed at the bottom of the screen. Before you continue, you should locate, and have available, the information included in the “Information necessary for completing effort report” page

Effort Reports - Search - Microsoft Internet Explorer

Address: https://fsprd-web.ps.umbc.edu/pspr/erp/c/UM_MENU_1.UM_ER_SRCH.GBL?FolderPath=PORTAL_ROOT_OBJECT.UM_EFFORT_REPORTING.UM_ER_SF

PeopleSoft

List Effort Rpts

Search Criteria

'BU	Year	Period	EmpID	Name	Seq No	Status
UMBC1	2005	Fall				Open

Fund	Dept	Project	Prog FIN	Partial Cert	Team	Name	Hide Line Detail	Show Member Detail
					1000005841	Nolan, Michael P	<input type="checkbox"/>	<input type="checkbox"/>

Fetch Select All Deselect All Print Selected Print this List Print Options

Effort Reports

Year	Period	EmpID	Name	Seq	Status	Fund	Dept	Prog FIN	Project	Partial Cert	Gross Amount	% Distrib	View Report	
1	2005	Fall	1000004545	Spencer, John P	1	Open	1253	10138	031	CV430471	N	4223.3	9.66	

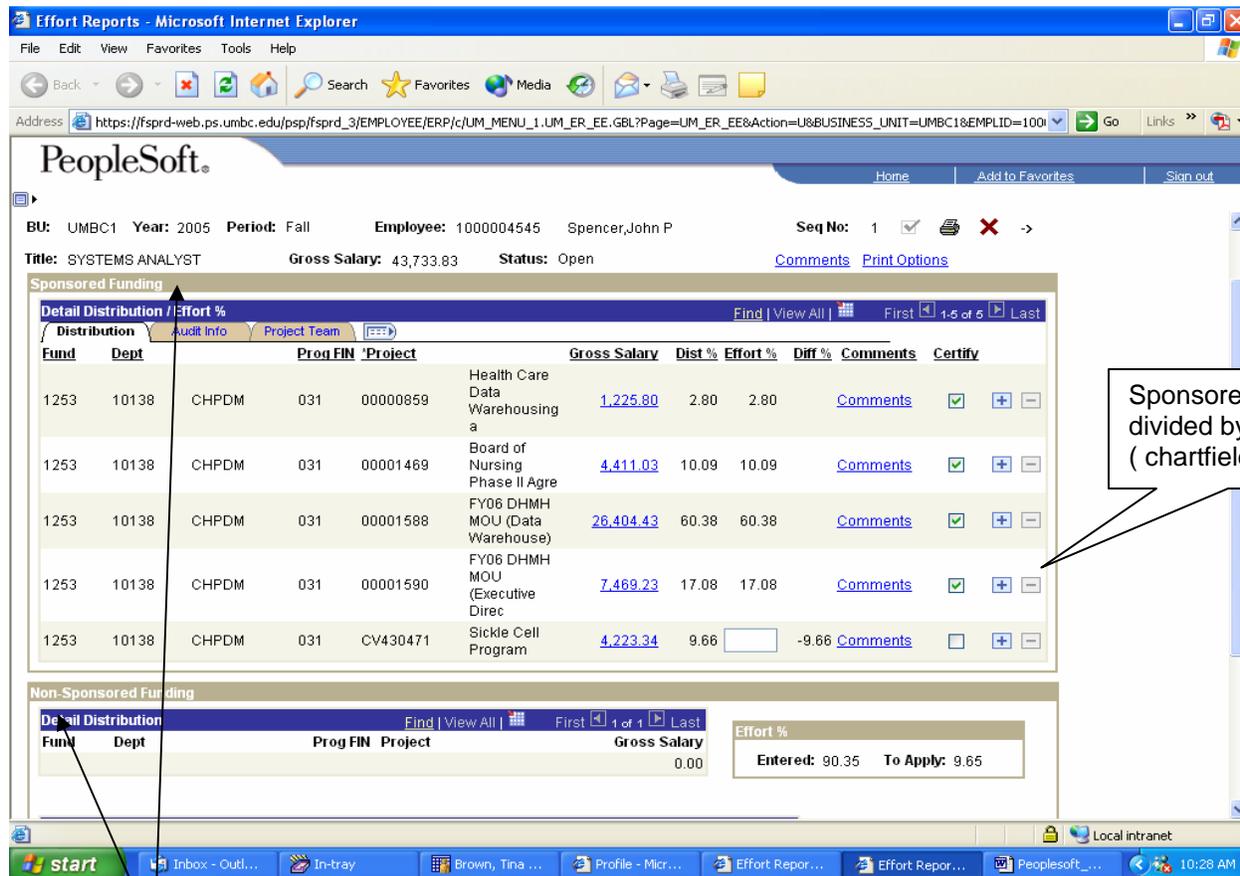
Save Return to Search Notify

Done

start Inbox - Out... In-tray Brown, Tina Effort Repor... myUMBC: A... Effort Repor... Peoplesoft... Local intranet 11:24 AM

1. To View the desired report, click on the **View Report icon**. The selected report is displayed.

Effort Report - screen overview.



The screenshot shows the PeopleSoft Effort Reports interface in a Microsoft Internet Explorer browser window. The browser address bar shows the URL: https://fspd-web.ps.umbc.edu/psp/fspd_3/EMPLOYEE/ERP/c/UM_MENU_1.UM_ER_EE.GBL?Page=UM_ER_EE&Action=U&BUSINESS_UNIT=UMBC1&EMPLID=1001. The PeopleSoft header includes navigation links for Home, Add to Favorites, and Sign out.

Screen Header Information: BU: UMBC1 Year: 2005 Period: Fall Employee: 1000004545 Spencer, John P Seq No: 1 Title: SYSTEMS ANALYST Gross Salary: 43,733.83 Status: Open

Sponsored Funding Section: This section is divided into line detail (chartfields). The table below shows the data for sponsored funding:

Fund	Dept	Prog FIN	Project	Gross Salary	Dist %	Effort %	Diff %	Comments	Certify
1253	10138	CHPDM	031 00000859 Health Care Data Warehousing a	1,225.80	2.80	2.80		Comments	<input checked="" type="checkbox"/> + -
1253	10138	CHPDM	031 00001469 Board of Nursing Phase II Agre	4,411.03	10.09	10.09		Comments	<input checked="" type="checkbox"/> + -
1253	10138	CHPDM	031 00001588 FY06 DHMH MOU (Data Warehouse)	26,404.43	60.38	60.38		Comments	<input checked="" type="checkbox"/> + -
1253	10138	CHPDM	031 00001590 FY06 DHMH MOU (Executive Direc	7,469.23	17.08	17.08		Comments	<input checked="" type="checkbox"/> + -
1253	10138	CHPDM	031 CV430471 Sickle Cell Program	4,223.34	9.66		-9.66	Comments	<input type="checkbox"/> + -

Non-Sponsored Funding Section: This section includes all non grant related funding. The table below shows the data for non-sponsored funding:

Fund	Dept	Prog FIN	Project	Gross Salary
				0.00

Effort % Summary: Entered: 90.35 To Apply: 9.65

Sponsored Section – divided by line detail (chartfields)

Screen Header Information consists of: BU* (UMBC1), Year (2005), Period (Fall), Employee (emplid), Seq No (1), Title, Gross Salary, Status (Open)

SPONSORED FUNDING

Line Item made up of chartfields called: Fund, Dept#, Prog Fin, Project, Distribution of Gross Salary

NON-SPONSORED FUNDING

Includes all non grant related funding

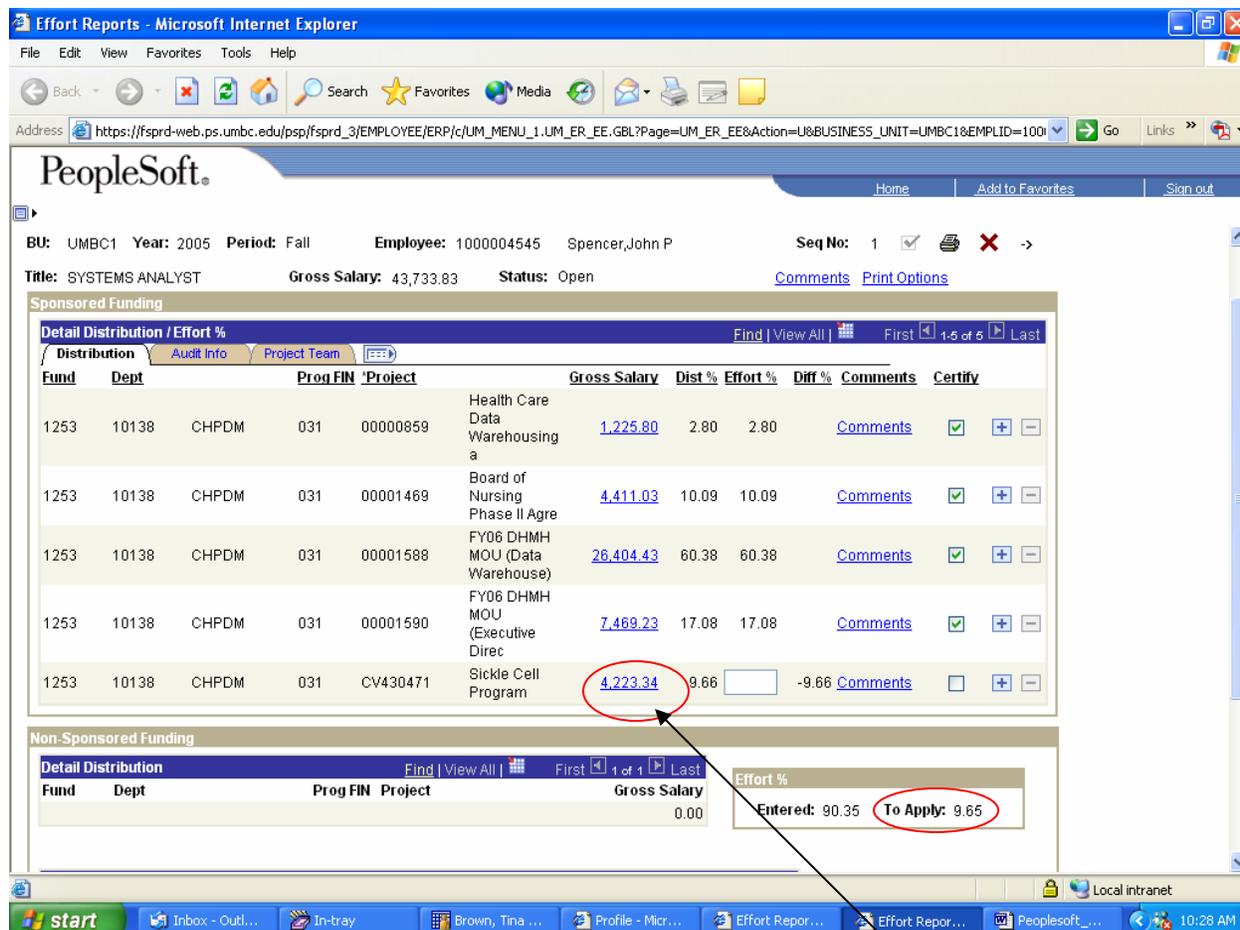
Certifying Effort

Rules for Effort Percentage

There are a few basic rules that must be followed for data entered onto this page:

- 1) The Effort Percent for any given row must be between zero and 100%.
- 2) For a **Sponsored row**, the Effort % must be equal to or greater than the Dist % (which is the percentage of total gross pay for that particular row). You can save a row with an Effort % lower than the Dist %, but you cannot finalize it that way. If the Effort % must be lower, then a retro-pay transaction must be processed in HR to lower the Dist % before the row can be finalized.
- 3) Effort Percent in the Non-Sponsored Funding section is broken into three categories: Instructional/Non-Sponsored Research, Administrative and Sabbatical. The Effort % entered for each should represent that amount of time spent in that category across ALL non-sponsored funding rows combined.
- 4) Total Effort % for the Non-Sponsored Funding section can be less than the Dist % for that sector or zero.
- 5) The Effort% box in the lower right hand corner, contains the total of percentage of effort entered. If it is less than 100% (see number 6)
- 6) The 'To Apply:' field in the small gray Effort % box in the upper right corner of the Non-Sponsored Funding section indicates the total Effort % that must be distributed to either Sponsored or Non-Sponsored categories. Total Effort% must equal 100%. Any changes entered dynamically effects the Effort % in any of the fields on the page are modified.
- 7) The page can be saved if the total Effort % on the page is greater than 100%. This must be corrected, however, so the total Effort % for the entire page equals 100% before the header status will be updated to Ready for Review. Until then, it cannot be Finalized at the header level by the Effort Reporting Administrator.

Steps for Completing Effort Reports



The screenshot shows the PeopleSoft interface for Effort Reports. The user is logged in as Spencer, John P. (Employee: 1000004545). The report is for BU: UMBC1, Year: 2005, Period: Fall. The Gross Salary is 43,733.83 and Status is Open.

Sponsored Funding

Fund	Dept	Prog	FIN	Project	Description	Gross Salary	Dist %	Effort %	Diff %	Comments	Certify
1253	10138	CHPDM	031	00000859	Health Care Data Warehousing a	1,225.80	2.80	2.80		Comments	<input checked="" type="checkbox"/>
1253	10138	CHPDM	031	00001469	Board of Nursing Phase II Agree	4,411.03	10.09	10.09		Comments	<input checked="" type="checkbox"/>
1253	10138	CHPDM	031	00001588	FY06 DHMH MOU (Data Warehouse)	26,404.43	60.38	60.38		Comments	<input checked="" type="checkbox"/>
1253	10138	CHPDM	031	00001590	FY06 DHMH MOU (Executive Direc	7,469.23	17.08	17.08		Comments	<input checked="" type="checkbox"/>
1253	10138	CHPDM	031	CV430471	Sickle Cell Program	4,223.34	9.66		-9.66	Comments	<input type="checkbox"/>

Non-Sponsored Funding

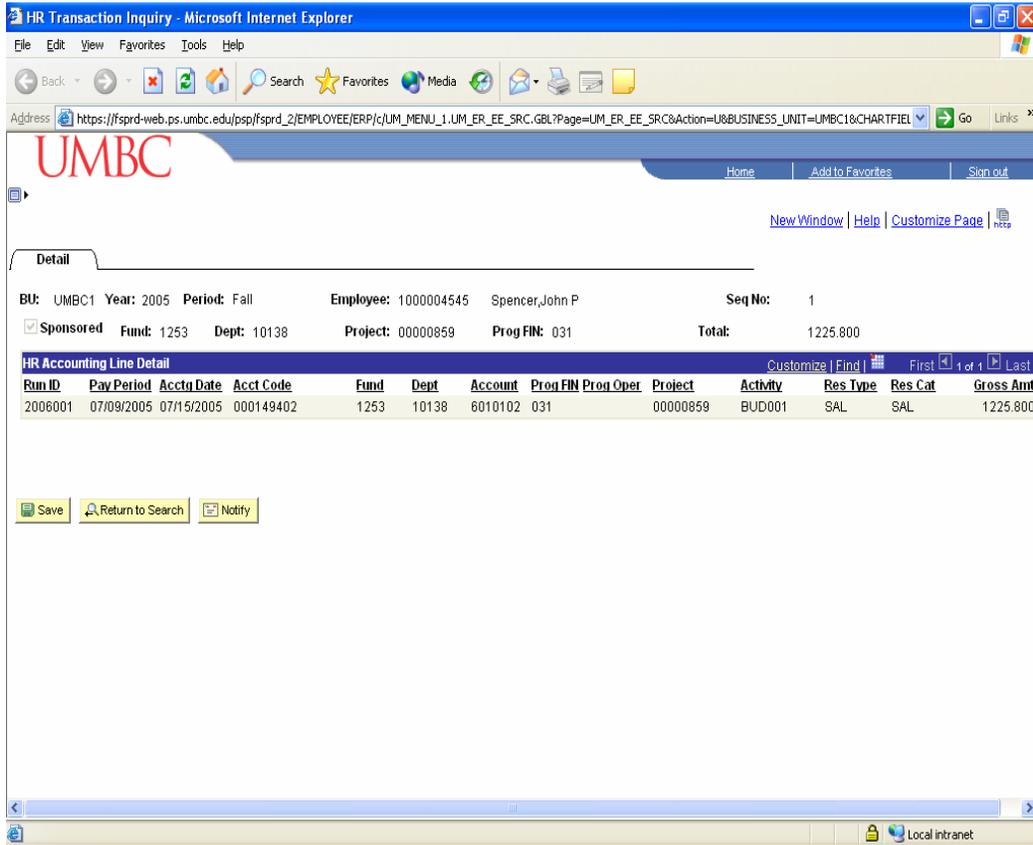
Fund	Dept	Prog	FIN	Project	Gross Salary	Effort %
					0.00	

Effort % summary: Entered: 90.35, To Apply: 9.65

1. Verify your supporting documentation to the payroll listed in the Sponsored section for each project listed. If you need to see the payroll detail for any transaction, **click** the link under Gross Salary. If the payroll matches the grant continue to two. If it doesn't reconcile the difference.
2. Enter Effort Percentage in the appropriate fields.
3. Distribute the To Apply amount to the Non-sponsored section after all Sponsored rows are complete.

Payroll Drill Down

You can link directly to the detail for the Gross Salary, if you have questions about payroll distribution. When you select the Gross Salary link for an effort report, you are taken to the HR Transaction Inquiry screen.



HR Transaction Inquiry - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address https://fsprd-web.ps.umbc.edu/pspr/psprd_2/EMPLOYEE/ERP/c/UM_MENU_1.UM_ER_EE_SRC.GBL?Page=UM_ER_EE_SRC&Action=U&BUSINESS_UNIT=UMBC1&CHARTFIEL Go Links

UMBC Home Add to Favorites Sign out

[New Window](#) | [Help](#) | [Customize Page](#) | [Help](#)

Detail

BU: UMBC1 Year: 2005 Period: Fall Employee: 1000004545 Spencer, John P Seq No: 1

Sponsored Fund: 1253 Dept: 10138 Project: 00000859 Prog FIN: 031 Total: 1225.800

HR Accounting Line Detail [Customize](#) | [Find](#) | [First](#) | [1 of 1](#) | [Last](#)

Run ID	Pay Period	Acctg Date	Acct Code	Fund	Dept	Account	Prog FIN	Prog Oper	Project	Activity	Res Type	Res Cat	Gross Amt
2006001	07/09/2005	07/15/2005	000149402	1253	10138	6010102	031		00000859	BUD001	SAL	SAL	1225.800

[Save](#) | [Return to Search](#) | [Notify](#)

Local intranet

This screen verifies pay periods charged to the grant.

Rules for Certifying

There are several security rules that apply to users on the Effort Reporting page for non-Effort Reporting Administrators (**Note – all of these security rules are waived for Effort Reporting Administrators, but the Effort Percentage Rules apply to all users**).

- 1) In order to have access to the Effort % field and the Certification checkbox on a Sponsored Funding row, the Employee ID for the person logged into the system (which is configured on the User ID for that user) must be assigned as a PI to the Project ID on that row. The Project Team is maintained by the Grant Accounting Office.
- 2) Clicking the Certify checkbox for accessible rows (based on the above rule), locks the Effort % field for that row and records the User ID and the date/time stamp for the employee that checked the box in the Audit fields. Audit fields can be viewed on the second tab in the Sponsor Funding Section and via the Audit Hyperlink in the Non-Sponsored Funding section. Note that this hyperlink only appears after the Non-Sponsored Funding section is Finalized.
- 3) After Clicking the Certify checkbox for any given row, you will be prompted with a separate page asking you to acknowledge a certification statement by clicking Certify and Save. Clicking Cancel returns you to the Effort Report without updating the status.
- 4) The Certify checkbox can be un-clicked by anyone that has access to click it for that row, provided that the Effort Reporting Administrator has not Finalized the Effort Report at the Header Level. If needed, the Effort Reporting Administrator can Un-finalize the Effort Report at the Header Level, but this will require that an explanation be keyed into the Comments at the header level.
- 5) Don't forget to update the search screen you must click the fetch button. This will allow you to see how many reports are still open.

Certifying Effort

Effort Reports - Microsoft Internet Explorer

Address: https://fsprd-web.ps.umbc.edu/pspp/fsprd_3/EMPLOYEE/ERP/c/UM_MENU_1.UM_ER_EE.GBL?Page=UM_ER_EE&Action=U&BUSINESS_UNIT=UMBC1&EMPLID=100

PeopleSoft. Home Add to Favorites Sign out

BU: UMBC1 Year: 2005 Period: Fall Employee: 1000004545 Spencer, John P Seq No: 1

Title: SYSTEMS ANALYST Gross Salary: 43,733.83 Status: Open

Sponsored Funding

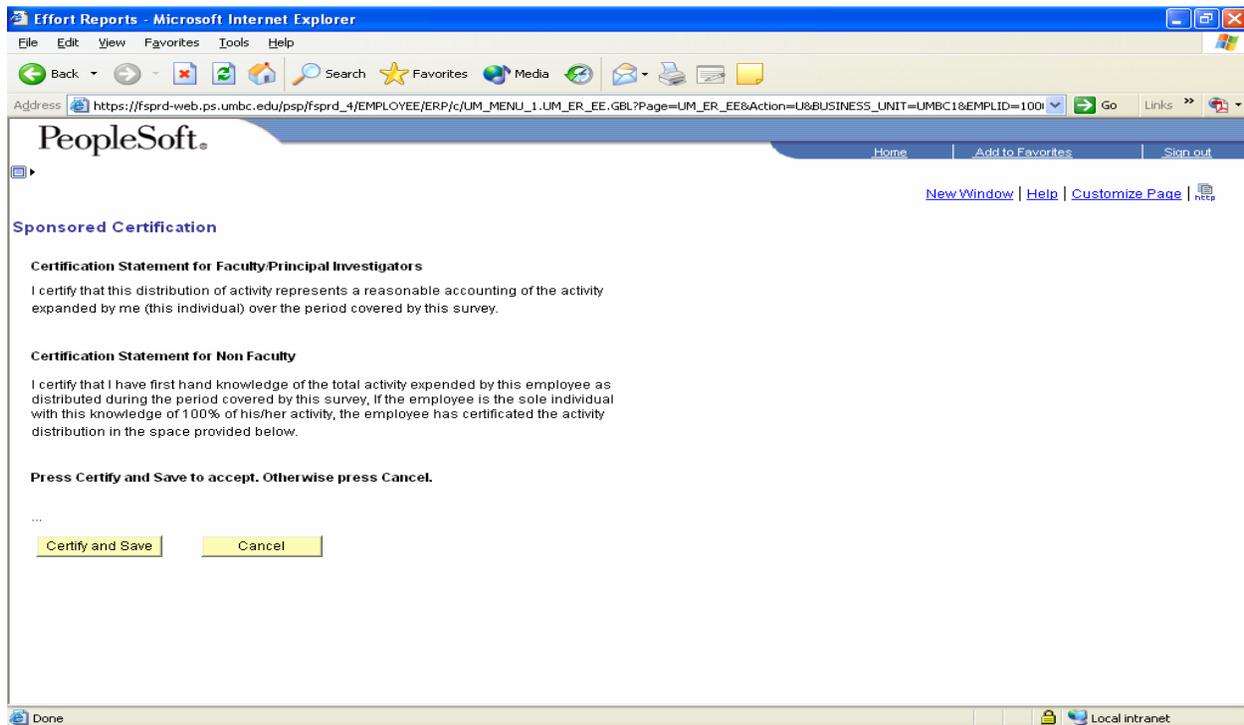
Detail Distribution / Effort %										
Fund	Dept	Proj	FIN	Project	Gross Salary	Dist %	Effort %	Diff %	Comments	Certify
1253	10138	CHPDM	031	00000859	1,225.80	2.80	2.80		Comments	<input checked="" type="checkbox"/>
1253	10138	CHPDM	031	00001469	4,411.03	10.09	10.09		Comments	<input checked="" type="checkbox"/>
1253	10138	CHPDM	031	00001588	26,404.43	60.38	60.38		Comments	<input checked="" type="checkbox"/>
1253	10138	CHPDM	031	00001590	7,469.23	17.08	17.08		Comments	<input checked="" type="checkbox"/>
1253	10138	CHPDM	031	CV430471	4,223.34	9.66		-9.66	Comments	<input type="checkbox"/>

Non-Sponsored Funding

Fund	Dept	Proj	FIN	Project	Gross Salary
					0.00

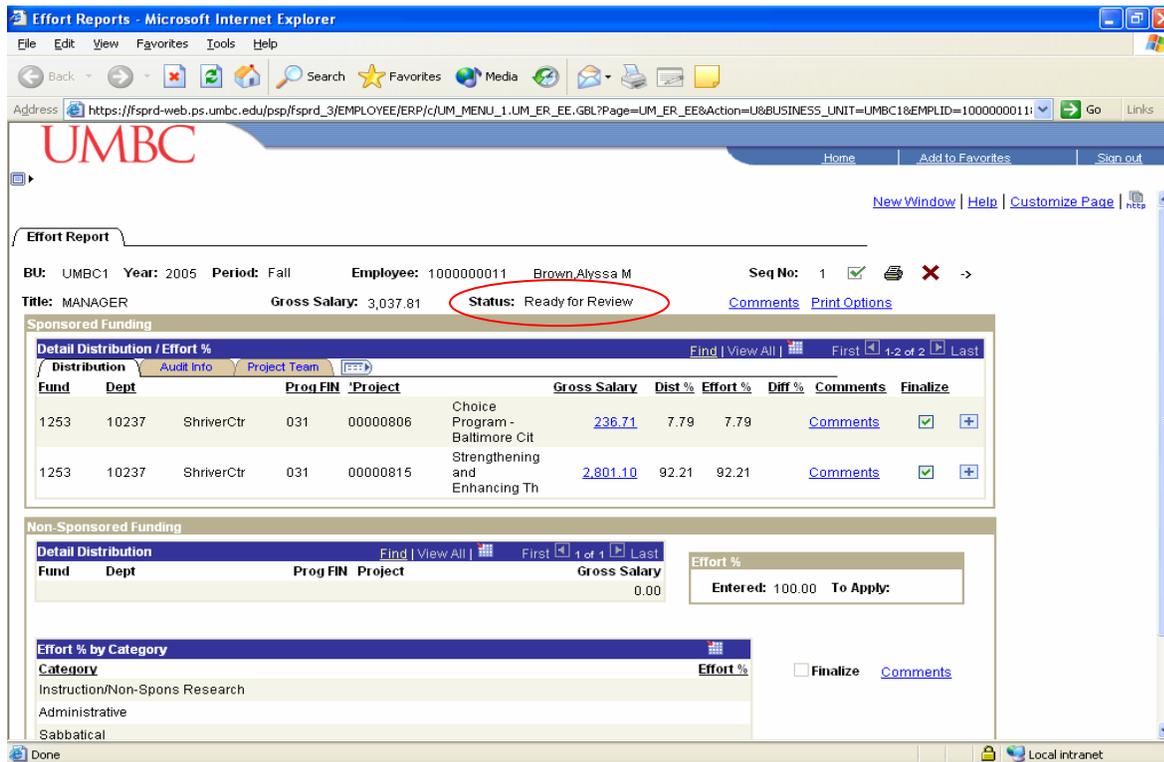
Effort %
Entered: 90.35 To Apply: 9.65

1. Click the **Certify** checkbox to certify a row, when you are ready to certify the distribution of effort. The Sponsored Certification screen is displayed.



2. Read the Certification statements, and click **Certify and Save** to otherwise click cancel. You are returned to the Effort Report screen.

3. Notice the Status is changed from Open, to Ready to Review.



Effort Report

BU: UMBC1 Year: 2005 Period: Fall Employee: 100000011 Brown, Alyssa M Seq No: 1

Title: MANAGER Gross Salary: 3,037.81 **Status: Ready for Review** [Comments](#) [Print Options](#)

Sponsored Funding

Fund	Dept	Proj FIN	Project	Gross Salary	Dist %	Effort %	Diff %	Comments	Finalize
1253	10237	ShriverCtr	031 00000806	236.71	7.79	7.79		Comments	<input checked="" type="checkbox"/>
1253	10237	ShriverCtr	031 00000815	2,801.10	92.21	92.21		Comments	<input checked="" type="checkbox"/>

Non-Sponsored Funding

Fund	Dept	Prog FIN	Project	Gross Salary
				0.00

Effort %
Entered: 100.00 To Apply:

Effort % by Category

Category	Effort %
Instruction/Non-Spons Research	
Administrative	
Sabbatical	

Finalize [Comments](#)

Comments

There are a couple of points to make regarding Comments:

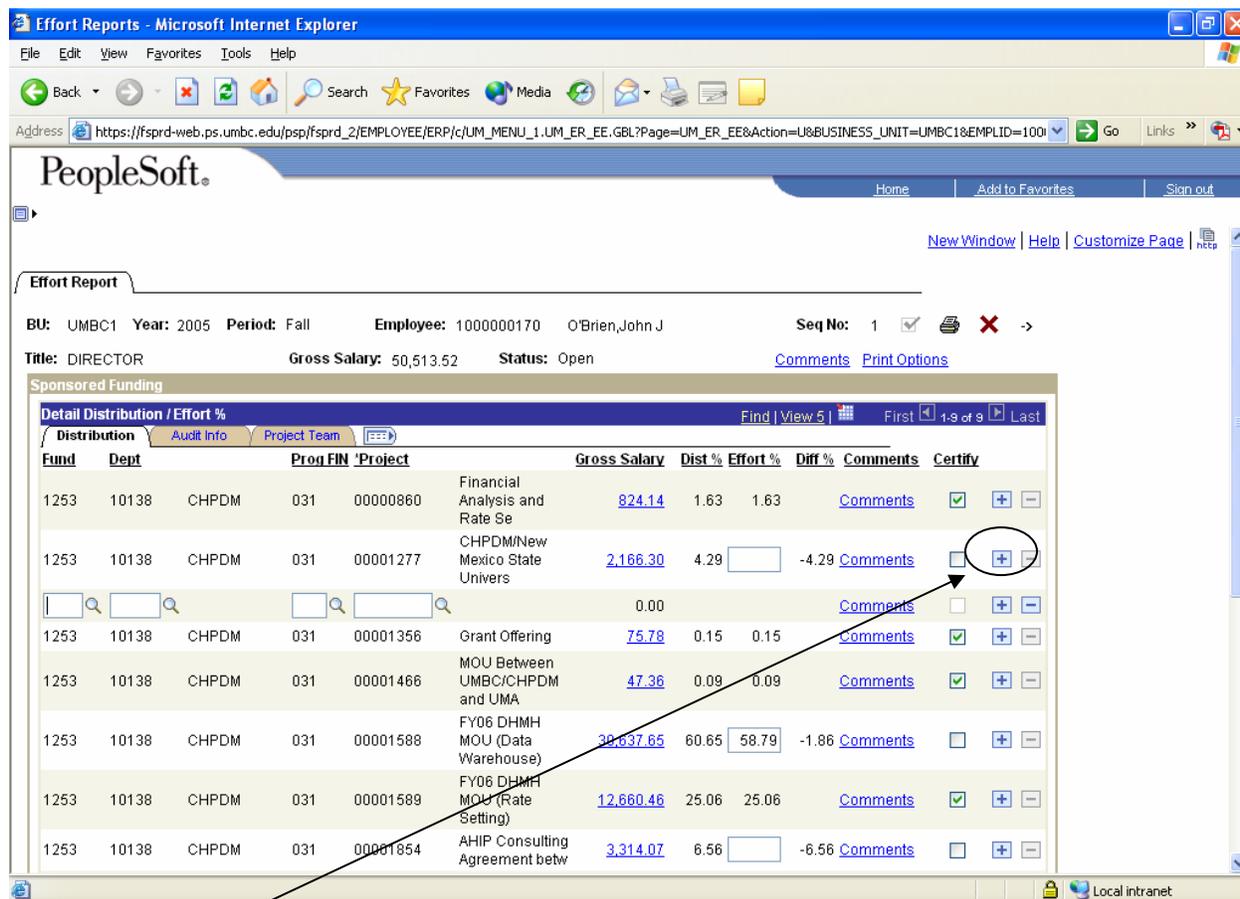
- 1) Comments can be added to each row in the Sponsored Funding section of the page, to the entire non-sponsored section, and to the header section. Multiple comment entries can be made for each of these areas. In other words, for any single row in the sponsored funding section, you can have multiple comment entries by different users with different date/time stamps.
- 2) Comments can be added to any section by any user with write access to the page. No security is applied to the comments link.
- 3) Comments cannot be deleted, but they can be modified.
- 4) A User ID and date/time stamp are added for the last user to modify each individual comment.

Note: If status doesn't change the entered % does not equal 100%.
Status Open – Ready for Review - Finalized

ADDITIONAL INFORMATION:

Adding / Deleting Manual Rows

Manual rows can be added to the Sponsored Funding section to show effort spent against a grant where no salary was distributed. All of the above rules regarding Effort % and Project Team security will apply to those manual rows. Manually added rows can be deleted provided the row has not been finalized and that the user trying to delete the row is on the Project Team for the Project on that manual row.

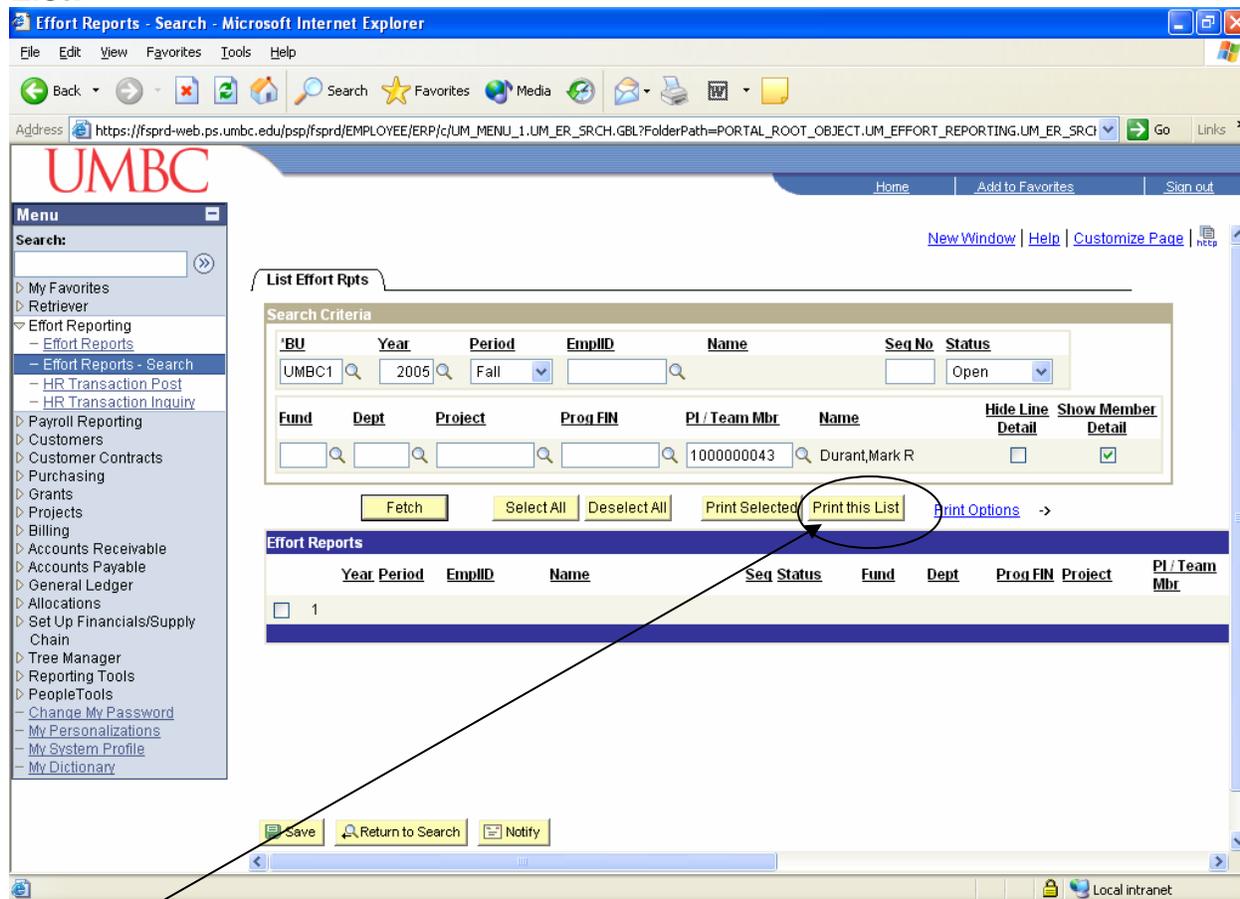


The screenshot shows the PeopleSoft 'Effort Report' interface. The 'Sponsored Funding' section is active, displaying a table with columns: Fund, Dept, Prog FIN, Project, Gross Salary, Dist %, Effort %, Diff %, Comments, and Certify. The second row is highlighted, and its 'Certify' column contains a circled '+' icon. An arrow points from this icon to the first step of the instructions below.

Fund	Dept	Prog FIN	Project	Gross Salary	Dist %	Effort %	Diff %	Comments	Certify
1253	10138	CHPDM	031 00000860	824.14	1.63	1.63		Comments	<input checked="" type="checkbox"/>
1253	10138	CHPDM	031 00001277	2,166.30	4.29		-4.29	Comments	<input type="checkbox"/>
				0.00				Comments	<input type="checkbox"/>
1253	10138	CHPDM	031 00001356	75.78	0.15	0.15		Comments	<input checked="" type="checkbox"/>
1253	10138	CHPDM	031 00001466	47.36	0.09	0.09		Comments	<input checked="" type="checkbox"/>
1253	10138	CHPDM	031 00001588	38,837.65	60.65	58.79	-1.86	Comments	<input type="checkbox"/>
1253	10138	CHPDM	031 00001589	12,660.46	25.06	25.06		Comments	<input checked="" type="checkbox"/>
1253	10138	CHPDM	031 00001854	3,314.07	6.56		-6.56	Comments	<input type="checkbox"/>

1. Click the + to add a row.
2. Enter the fund, dept #, Prog fin and project # in the blank boxes. This will prompt the Effort % box to appear.
3. Enter the effort % and check the certify box just as the other rows.

Printing Master List:



The screenshot shows a web browser window titled 'Effort Reports - Search - Microsoft Internet Explorer'. The address bar shows the URL: https://fsprd-web.ps.umbc.edu/pspr/EMPLOYEE/ERP/c/UM_MENU_1.UM_ER_SRCH.GBL?FolderPath=PORTAL_ROOT_OBJECT.UM_EFFORT_REPORTING.UM_ER_SRCI. The page content includes a 'Menu' sidebar on the left, a 'List Effort Rpts' header, and a 'Search Criteria' section with the following fields:

BU	Year	Period	EmpID	Name	Seq No	Status
UMBC1	2005	Fall				Open

Below the search criteria is a table of results:

Fund	Dept	Project	Prog FIN	PI / Team Mbr	Name	Hide Line Detail	Show Member Detail
				1000000043	Durant, Mark R	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Buttons at the bottom of the search criteria section include 'Fetch', 'Select All', 'Deselect All', 'Print Selected', 'Print this List', and 'Print Options'. The 'Print this List' button is circled in red, and an arrow points from it to the first step of the instructions below.

1. **Click** the Print this list button.
2. **Click** the arrow next to Print Options. This takes you to Process Monitor.
3. **Click** detail beside the crystal report titled UMERLIST. View log/trace and print.

MODULE 3: Different Scenarios Issues

If the have completed the effort reports and the status

Status	Scenario	Input	Resolution
Open	Multiple PIs on an effort report	Effort% must be entered by each before the effort report will can be finalize	Check other tab in effort report to see the other PIs that need to certify other projects
Open	Effort% not equal to 100% after certifying	Effort% (less than or greater than 100) and certify	Change the Effort% to equal 100% or Put in a RETRO to change the distribution so the effort report can be finalized
Open	Effort Report reopened to a Seq 2 after being finalized	A RETRO was processed to cause the effort report to reopen	The distribution on the new effort report needs to be reevaluated to determine the effort%
Open	No effort reports are in the list after you fetch	The search criteria ie. BU, Year, Period and PI/Team Mbr...	Clean you computer cache files. <ol style="list-style-type: none"> 1. Microsoft Explorer – Tools – Internet Options <ul style="list-style-type: none"> • delete cookies • delete files 2. Close Internet Explorer and reopen.

What do I do if...?

Situations may occur while preparing to certify effort reports that may be out of your control, or that you may require assistance. Below are examples of what may happen, and how to respond if it does.

Issue	Potential Cause	How to react
User does not have the Effort Reporting Menu item on their screen in PeopleSoft Test.	The user has the wrong security access in PeopleSoft.	Log into PeopleSoft using your ID in the PeopleSoft Test Instance.
User does not have the Effort Reporting Menu item on their screen in PeopleSoft Finance Production.	The user has the wrong security access in PeopleSoft.	<ol style="list-style-type: none"> 1. Ask the user if you can reschedule the session. 2. Contact Tina (Grants and Contracts) to get the user the correct access.
A user cannot locate an effort report they think they should have	<p>If this is happening in Test, remember that the Test database does not have up to date information.</p> <p>If this is happening in Production,</p> <ol style="list-style-type: none"> 1. The search criteria may be incorrect 2. Person's distribution is not on a grant (They are not the PI on the grant on the system) 	<ol style="list-style-type: none"> 1. Search for information using different search criteria. 2. Go to payroll report and search by emplid.
A user cannot locate any effort reports that are still open	If this happens in HTST or HPRD Peoplesoft has been updated since the last time you logged in.	<p>Clean you computer cache files.</p> <ol style="list-style-type: none"> 1. Microsoft Explorer – Tools – Internet Options <ul style="list-style-type: none"> • delete cookies • delete files 2. Close Explorer and reopen

Appendix 1: PeopleSoft Terminology

Below is a definition for each of the Search Criteria fields:

BU (Business Unit) – This is the Business Unit configured under the BU Setup page for Effort Reporting. It is the only required field in this search view.

Year – Effort Reporting Year. This prompts from a list of Years that are configured for the above business unit.

Period – Prompts for ‘Fall’ or ‘Spring.’ On this page, it can be used independently from Year. In other words, you can select any Effort Reports in a Spring period for all Years.

EmplID (Employee ID) – This prompts from the Personal Data table. It is the Employee ID to which that each Effort Report is associated.

Name – This is a display only field for the above EmplID field.

Seq No- This is the Sequence Number for the Effort Report. Sequence numbers may be greater than one in order to retain approval history. For example, if an effort report for an employee is either Finalized or Canceled by the Effort Reporting Administrator, but then subsequent payroll transitions are processed for that employee on Payroll IDs included in that Effort Reporting Period (i.e., Retro-pay transactions), then the system saves the original row of data giving it a status of ‘Old Seq No.’ for Finalized rows or ‘Old X Seq’ for Canceled rows. A new row with the next highest Sequence number is created and given a status of **Open**. **Note – if a row on an effort report has been finalized but the header has not, all statuses for the same sequence number are reset to Open for the above situation.**

Status – Indicates the Status of the Effort Report Header:

Open – Indicates the Effort Report still has unapproved detail rows.

Fund – Fund ChartField; this looks for detailed rows that use this Fund ID and shows all Effort Reports that use that Fund.

Dept (Department) – Department ChartField; this looks for detailed rows that use this Department ID and shows all Effort Reports that use that Department.

Project – Project ChartField; this looks for detailed rows that use this Project ID and shows all Effort Reports that use that Project.

Prog FIN – Prog FIN ChartField; this looks for detailed rows that use this Prog FIN ID and shows all Effort Reports that use that Prog FIN .

PI / Team Mbr – Prompts from Employee IDs that are attached to Project Teams. Retrieves all for Effort Report rows for employees that are associated with projects for which this person is on the Project Team.

Name - This is a display only field for the above **PI / Team Mbr** field.