



WPI

Online Effort Reporting

Intro

- Purpose
- Log In

Report

- Open your effort report
- Review pay period summary

Actions

- Request changes
- Certify the report
- Print & close

Students

- Search for student/other grant personnel reports
- Review student/other grant personnel reports
- Review routing queue

All Done

- Sign Out
- Thank you for your prompt attention



WPI

Online Effort Reporting

January 7, 2015

INTRODUCTION

WPI is required by Federal Regulations to maintain an Effort Reporting System as a means to ensure salaries and wages charged or cost shared to sponsored research awards reasonably reflect the actual time devoted to the project.

Each report must be certified by the employee or a responsible person with suitable means of verification that the work was performed. The WPI Effort Reporting policy states that the effort report will be prepared semiannually, at the end of January and July, for the previous six month period. **The report should be certified within ten business days of report availability.**

Beginning in January, 2012, the WPI effort report is now paperless. Using Banner Self Service, the effort report will be produced, reviewed and certified electronically. As a PI, you will log into Banner Self Service to view and certify the reports for yourself and/or for students and other personnel paid or cost shared from your grant funds. If you believe the report does not accurately reflect the effort, please contact the Sponsored Research Accounting Office.

Please follow the instructions below to view and certify your report and your other grant personnel reports. Once certified, the reports are electronically routed to the Sponsored Research Accounting Office. You do not need to print any of the forms and they will remain available online for seven years.

Step 1:

LOG IN

To log into the Banner Self Service System, from Internet Explorer: Go to: BANNERWEB.WPI.EDU

Note: If you are off campus, you should use the [VPN](#).

Visit [Virtual Private Network](#) for more information about WPI's VPN.

LOG IN WITH YOUR USER NAME AND PASSWORD

If you forgot your password, contact the Helpdesk at 508-831-5888 or email helpdesk@wpi.edu.



Web Information System

Members of the WPI Community may now Login to the WPI Web Information System using any of the following:

- Windows Username and Password
- Social Security Number and PIN
- WPI ID and PIN (Faculty may use their WPI assigned initials)
Please note: Your PIN is a minimum of 6 and a maximum of 20 AlphaNumeric characters.
[Click here if you have forgotten your PIN.](#)

Between 2 a.m. EST and 5:30 a.m. EST the server may be unavailable.

To protect your privacy, please Exit and then close your browser when you are finished.

** Tuition Bills and Payment Options **

Look at your latest invoices and account information by selecting the Student Services tab and choosing the option titled **e-Bills and e-Payments** or [Click here to make payment without a WPI PIN](#)

WPI Username:

Password:

OR

*WPI ID Number:

PIN:

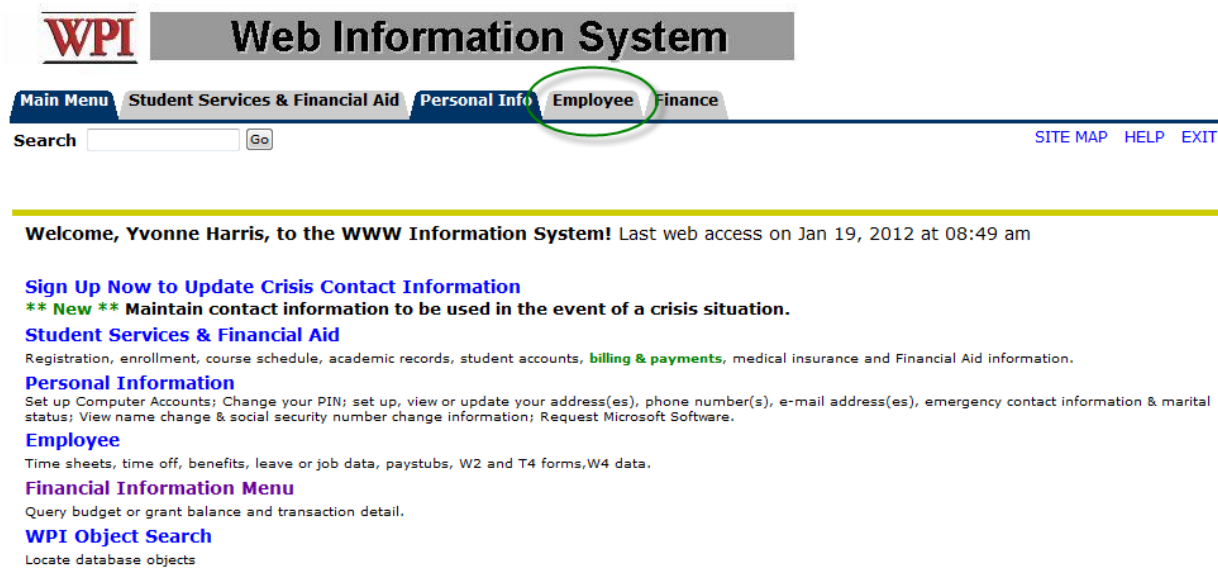
*ID Required to Reset PIN

[Forgot PIN?](#)

RELEASE: 8.3.1

SELECT EMPLOYEE TAB

Once you have logged into the Banner Self Service system, select the Employee Tab



WPI Web Information System

Main Menu Student Services & Financial Aid Personal Info **Employee** Finance

Search Go SITE MAP HELP EXIT

Welcome, Yvonne Harris, to the WWW Information System! Last web access on Jan 19, 2012 at 08:49 am

[Sign Up Now to Update Crisis Contact Information](#)
**** New **** Maintain contact information to be used in the event of a crisis situation.

[Student Services & Financial Aid](#)
Registration, enrollment, course schedule, academic records, student accounts, **billing & payments**, medical insurance and Financial Aid information.

[Personal Information](#)
Set up Computer Accounts; Change your PIN; set up, view or update your address(es), phone number(s), e-mail address(es), emergency contact information & marital status; View name change & social security number change information; Request Microsoft Software.

[Employee](#)
Time sheets, time off, benefits, leave or job data, paystubs, W2 and T4 forms, W4 data.

[Financial Information Menu](#)
Query budget or grant balance and transaction detail.

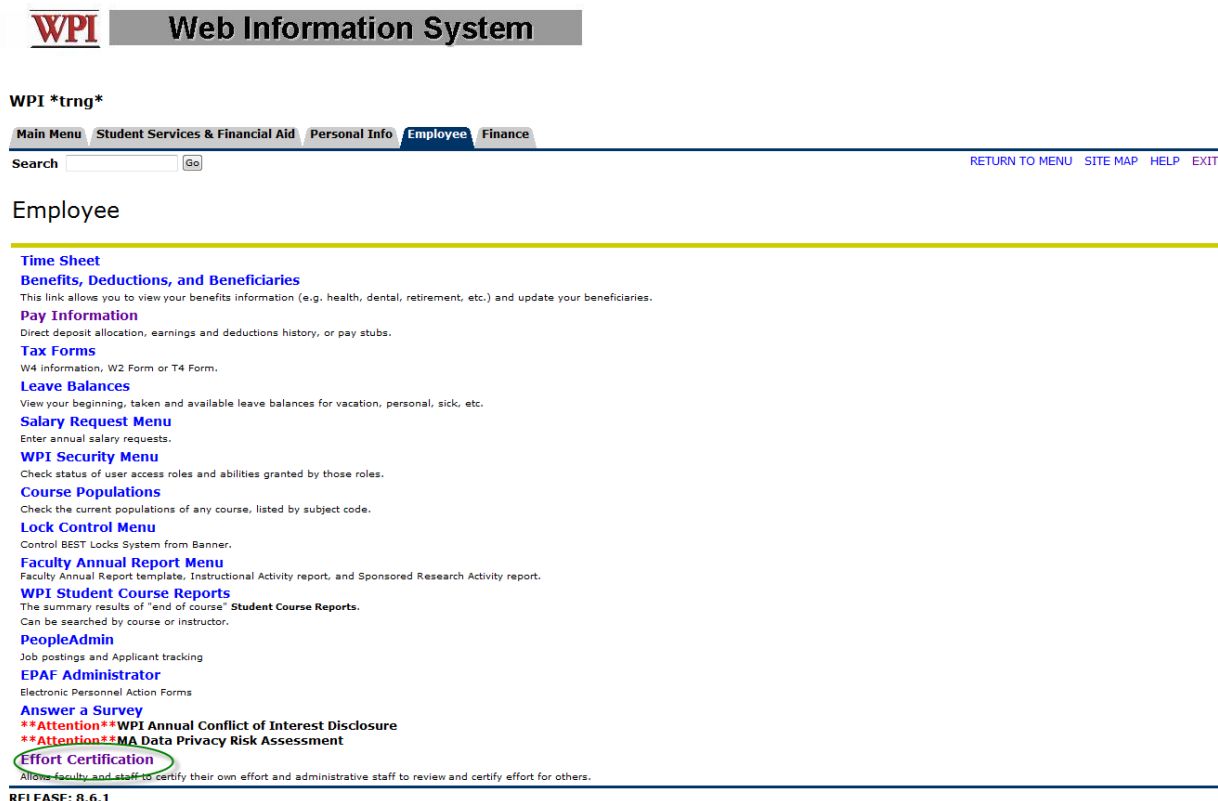
[WPI Object Search](#)
Locate database objects

[WPI Homepage](#)

RELEASE: 8.3

SELECT EFFORT CERTIFICATION

Once in the Employee menu, scroll all the way to the bottom and select Effort Certification



WPI Web Information System

WPI *trng*

Main Menu Student Services & Financial Aid Personal Info **Employee** Finance

Search Go RETURN TO MENU SITE MAP HELP EXIT

[Time Sheet](#)

[Benefits, Deductions, and Beneficiaries](#)
This link allows you to view your benefits information (e.g. health, dental, retirement, etc.) and update your beneficiaries.

[Pay Information](#)
Direct deposit allocation, earnings and deductions history, or pay stubs.

[Tax Forms](#)
W4 information, W2 Form or T4 Form.

[Leave Balances](#)
View your beginning, taken and available leave balances for vacation, personal, sick, etc.

[Salary Request Menu](#)
Enter annual salary requests.

[WPI Security Menu](#)
Check status of user access roles and abilities granted by those roles.

[Course Populations](#)
Check the current populations of any course, listed by subject code.

[Lock Control Menu](#)
Control BEST Locks System from Banner.

[Faculty Annual Report Menu](#)
Faculty Annual Report template, Instructional Activity report, and Sponsored Research Activity report.

[WPI Student Course Reports](#)
The summary results of "end of course" **Student Course Reports**.
Can be searched by course or instructor.

[PeopleAdmin](#)
Job postings and Applicant tracking

[EPAF Administrator](#)
Electronic Personnel Action Forms

[Answer a Survey](#)
****Attention**** WPI Annual Conflict of Interest Disclosure
****Attention**** MA Data Privacy Risk Assessment

[Effort Certification](#)
Allows faculty and staff to certify their own effort and administrative staff to review and certify effort for others.

RELEASE: 8.6.1

Step 2:

OPEN YOUR EFFORT REPORT

If you received salary expensed to a grant during the effort reporting period, a line of information will appear under the heading **Certify My Effort**. **DOUBLE** Click on the period code, or any other value on that line, to open the effort report. The Period Code is a six digit code consisting of the fiscal year and semester. For example 201201 reflects effort during July 2011-December 2011 (this is in fiscal year 2012). The next effort period will be named 201202, covering January 2012-June 2012 pay events.

Certify My Effort

COA	Period Code	Report Period	Start Date	End Date	Status	Unlocked/Locked
1	201201	July-November, 2011	December 05, 2011	January 27, 2012	Awaiting Certification	Unlocked

Step 3:

REVIEW YOUR EFFORT REPORT

The online effort report lists all Banner funds (both Sponsored and Non Sponsored) that you were paid from during the six month effort period. The rightmost column of the report displays the percentage of effort each Banner fund was charged during the six month effort period.

John Professor

Sponsored

Grant	Fund	Effort Category	Charge Type	Effort
213004 Water sanitation on Blank	213004 Water sanitation on Blank	OTHER Other Sponsored Activities	Direct	3.7%
208600 Hydris in water development	208600 Hydris in water development	RESEARCH Sponsored Research	Direct	15.98
Total				Sponsored Activity 23.71%

Non Sponsored

Fund	Organization	Effort Category	Charge Type	Effort
13001 General Operating Funds	208600 Your Organization		Direct	76.29
Total				Non Sponsored Activity 76.29%
Total				100.00%

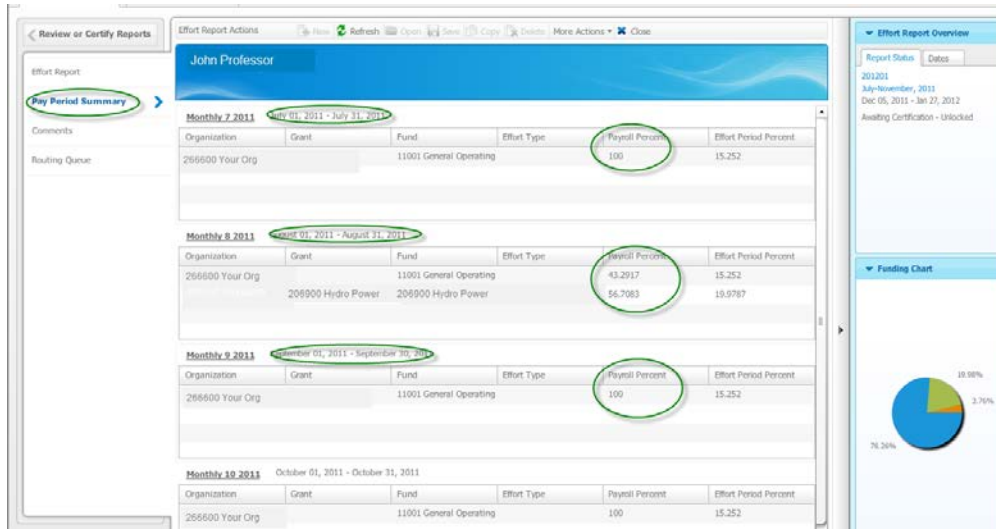
Funding Chart

15.98%
3.71%
76.29%

Step 4:

REVIEW PAY PERIOD SUMMARY

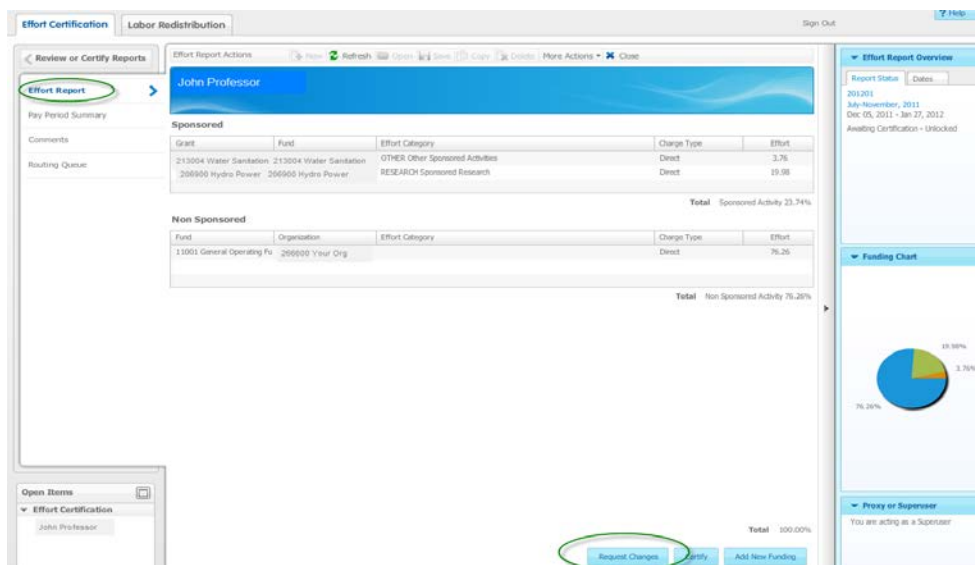
The Pay Period Summary will provide effort percentages by pay period, with each pay period totaling 100%. Review of this detail will provide the explanation for the calculation of the Effort Period effort percentages on the Effort Report.



Step 5

REQUEST CHANGES TO THE REPORT (if needed)

If you still have questions about the effort report, even after reviewing the Pay Period Summary, return to the Effort Report (click on Effort Report in upper left section) and select Request Changes. This will launch an email message, with the subject line already prepopulated. Insert the "TO" address for Heather Bilotta, Manager of Sponsored Research Accounting. Her WPI email address is hbilotta@wpi.edu. Type a brief message regarding your question or concern. Heather will review your comments and communicate with you regarding the effort report. The status for this report will be changed to Changes Requested.



Step 6

CERTIFY YOUR REPORT

If you agree with the effort percentages, click Certify.

Effort Certification | Labor Redistribution | Sign Out | ? Help

Review or Certify Reports

Effort Report >

Pay Period Summary

Comments

Routing Queue

Open Items

▼ **Effort Certification**

John Professor

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

John Professor

Sponsored

Grant	Fund	Effort Category	Charge Type	Effort
213004 Water Sanitation	213004 Water	OTHER Other Sponsored Activities	Direct	3.76
206900 Hydro Power	216900 Hydro Power	RESEARCH Sponsored Research	Direct	19.98

Total Sponsored Activity 23.74%

Non Sponsored

Fund	Organization	Effort Category	Charge Type	Effort
11001 General Operati	266600 Your Operating		Direct	76.26

Total Non Sponsored Activity 76.26%

Total 100.00%

Effort Report Overview

Report Status | Dates

201201
July-November, 2011
Dec 05, 2011 - Jan 27, 2012
Awaiting Certification - Unlocked

Funding Chart

Proxy or Superuser

You are acting as a Superuser

Buttons: Request Changes | **Certify** | Add New Funding

The certification statement will pop up, then click I Agree.

? **Certify**

I certify that, having firsthand knowledge or having used a suitable means of verification, the work was performed toward the above activities and that the certified effort percentages reflect a reasonable distribution of effort for this period.

Buttons: Cancel | **I Agree**

Step 7

PRINT THE REPORT (Optional)

If you would like to print a copy of your report, select More Options and Print. An image of the report will display, then click on the printer icon to print. This is an optional step. You are not required to print the report. It will be routed to the Sponsored Research Accounting Office electronically.

The screenshot shows the 'Effort Certification' interface for 'John Professor'. The 'More Actions' menu is open, and the 'Print' option is highlighted. The report displays 'Sponsored' and 'Non Sponsored' activity data. The 'Completed - Locked' status is also visible in the 'Effort Report Overview' panel.

Grant	Fund	Effort Category	Charge Type	Effort
213004 Water Sanitation	213400 Water Sanit	OTHER Other Sponsored Activities	Direct	3.76
206900 Hydro Power	206900 Hydro Power	RESEARCH Sponsored Research	Direct	19.98

Fund	Organization	Effort Category	Charge Type	Effort
11001 General Operating	2066600 Your Org		Direct	76.26

Total Sponsored Activity 23.74%
Total Non Sponsored Activity 76.26%

Step 8

CLOSE THE REPORT

Once a report is certified OR changes have been requested, the report status will change to completed and locked. You have just certified your effort report and it will be visible to Sponsored Research Accounting. After you have certified or requested changes, close the report by clicking the blue X next to the word Close.

The screenshot shows the 'Effort Certification' interface for 'John Professor'. The 'Close' button, represented by a blue X icon, is highlighted in the 'More Actions' menu. The report displays 'Sponsored' and 'Non Sponsored' activity data. The 'Completed - Locked' status is also visible in the 'Effort Report Overview' panel.

Grant	Fund	Effort Category	Charge Type	Effort
213004 Water Sanitation	213400 Water Sanit	OTHER Other Sponsored Activities	Direct	3.76
206900 Hydro Power	206900 Hydro Power	RESEARCH Sponsored Research	Direct	19.98

Fund	Organization	Effort Category	Charge Type	Effort
11001 General Operating	2066600 Your Org		Direct	76.26

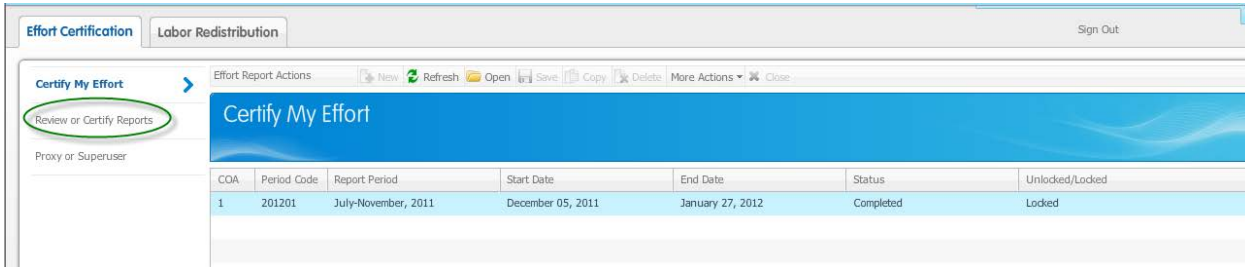
Total Sponsored Activity 23.74%
Total Non Sponsored Activity 76.26%

Step 9

SEARCH FOR OTHER REPORTS AWAITING YOUR CERTIFICATION

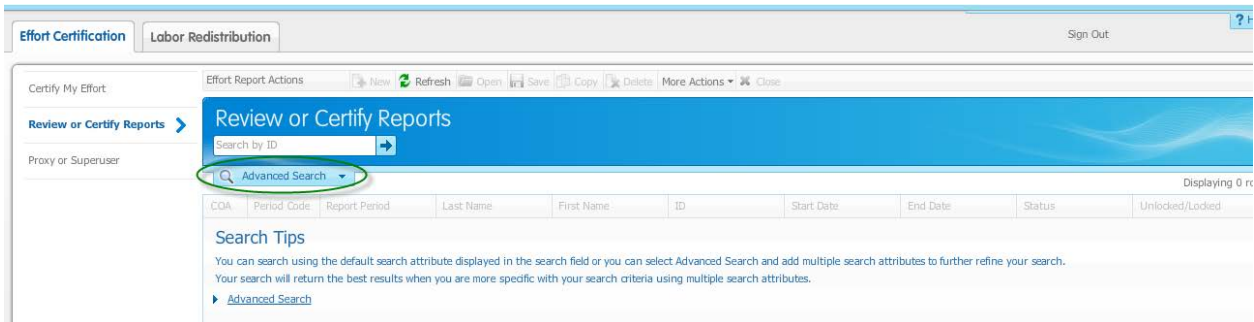
Once your own effort report is completed and closed, you must search for additional effort reports awaiting your certification as PI. The additional reports are for students and other personnel paid from your grant.

Select Review or Certify Reports



ADVANCED SEARCH

Perform a search for additional reports by clicking on the drop down arrow next to the Advanced Search option.



SELECT ATTRIBUTE

Now, select the attribute on which you will search. Click on the drop down arrow next to Select Attribute and scroll down all the way to the bottom to Status.



STATUS EQUALS AWAITING CERTIFICATION

When Status selected is Awaiting Certification, select GO. The system may take 30 to 60 seconds for processing.

The screenshot shows the 'Review or Certify Reports' window. The 'Status' dropdown menu is open, showing 'Awaiting Certification' selected. The 'Go' button is circled in green. The 'Search by ID' field is empty. The 'Advanced Search' button is visible at the bottom left of the search area. The table below the search area is empty, showing columns for COA, Period Code, Report Period, Last Name, First Name, ID, Start Date, End Date, Status, and Unlocked/Locked.

Step 10

REVIEW AND CERTIFY REMAINING REPORTS

If you have additional reports awaiting certification, one line of data will appear for each report you must review. In this example, a report for John Doe requires your certification. Now follow the same procedures that you followed to review and certify your effort report. Double click on the name to begin the review.

The screenshot shows the 'Review or Certify Reports' window with a search result for John Doe. The 'Status' is 'Awaiting Certification'. A red arrow points to the 'Period Code' (201201) with a text box saying 'Double click on period code to open this report'. The table below the search area shows one row of data.

COA	Period Code	Report Period	Last Name	First Name	ID	Start Date	End Date	Status	Unlocked/Locked
	201201	July-November, 2011	Doe	John	267984256	December 05, 2011	January 27, 2012	Awaiting Certification	Unlocked

REVIEW AND CERTIFY THE EFFORT REPORT

Review the effort report and, if in agreement, select **Certify**. If you do not agree with the effort report, select **Request Changes** to generate an email message to Heather Bilotta. Next, close the report.

The screenshot displays the 'Effort Certification' interface. On the left, a sidebar contains 'Review or Certify Reports', 'Effort Report', 'Pay Period Summary', 'Comments', 'Routing Queue', and 'Open Items'. The 'Open Items' section lists 'Effort Certification' for 'Jane Student'. The main area shows the 'Effort Report' for 'Jane Student' with a table of sponsored activities. The 'Certify' button is highlighted with a green circle. The 'Request Changes' and 'Add New Funding' buttons are also visible.

Grant	Fund	Effort Category	Charge Type	Effort
213004 Water Sanitation	213004 Water Sanitation	RESEARCH Sponsored Research	Direct	100

Total Sponsored Activity 100.00%

Fund	Organization	Effort Category	Charge Type	Effort
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Total Non Sponsored Activity 0.00%

Total 100.00%

Buttons: Request Changes, **Certify**, Add New Funding

Right sidebar: Effort Report Overview (Report Status, Dates: 201201, 2011, 2012, Awaiting Certification - Unlocked), Funding Chart (100% orange circle), Proxy or Supersuser.

REVIEW AND CERTIFY ALL REMAINING EFFORT REPORTS

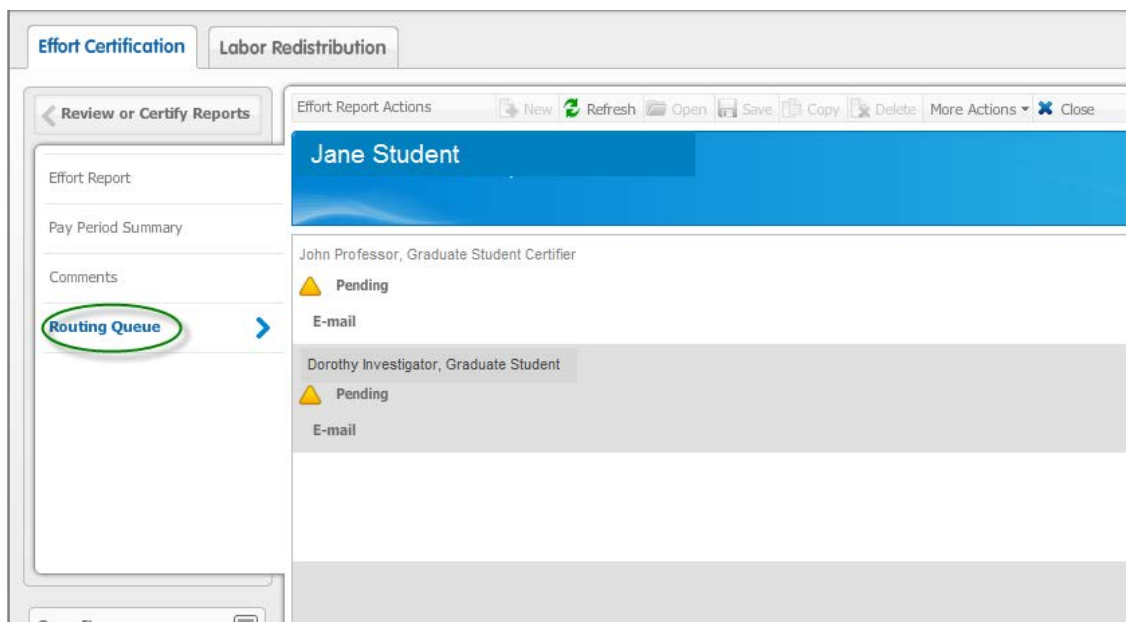
When you close the report, you will be returned to the list of reports under your review. Repeat the steps to review and certify all effort reports that are Awaiting Certification.

Multiple Grants/Routing Queue

A STUDENT OR OTHER GRANT PERSONNEL PAID ON MULTIPLE GRANTS, EACH WITH A DIFFERENT PI, REQUIRE CERTIFICATION FROM THE PI FROM EACH GRANT

If a student or other personnel is paid from multiple grants, each of which are under the responsibility different PI's, the effort report must be certified by a PI or COPI from each grant he or she received payment from. For example, if a student was paid from grant 1, managed by Prof. X, and also received payment from grant 2, managed by Prof. Y, both professors X and Y are required to sign the effort report. The required approvals are displayed in the Routing Queue.

You can view the Routing Queue by clicking on the words Routing Queue on the left side of the page.



Step 12

SIGN OUT

Once all of the reports are completed, you are finished. Please Sign Out. Thank you for your prompt attention. If you have any questions, please do not hesitate to call:

Heather Bilotta, Sponsored Research Accounting Manager, hbilotta@wpi.edu or Yvonne Harris, Information Analyst, ydharris@wpi.edu

