



**Responsible University Department:**

Controller's Office, Grants and Contracts

Accounting Services

Division of Information Technology, EIS

# **Effort Reporting 9 Effort Administrator User Guide**

**9/1/2020**

## Table of Contents

Contact Information.....	3
Helpful Links.....	3
GW Effort Certification Overview.....	4
Effort Reporting Phases.....	4
Effort Reporting Roles.....	4
Overview of the Effort Report Page.....	5
Logging Into the System.....	6
Email Notification Configuration.....	9
Steps to Pre-Review an Effort Report.....	11
• Select and Review Effort report(s).....	11
• Review an Effort Report Pay Period Summary.....	13
• Add Comments to an Effort Report.....	14
• Review an Effort Report Routing Queue.....	14
• Add an additional Pre-Reviewer to Review an Effort Report.....	14
• Add an Alternate Certifier to Certify an Effort Report.....	15
• Unlock Locked Effort Reports.....	15
Steps for Alternate Certifiers to Certify an Effort Report.....	16
• Select and Review Effort report(s).....	16
• Review the Effort Report Pay Period Summary.....	17
• Add Comments to an Effort Report.....	18
Adding a Proxy.....	19
Processing a Labor Redistribution.....	21
Running the Audit Report (PZRERAU).....	26

## Contact Information

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## Helpful Links

GW Effort Reporting Policy: <https://compliance.gwu.edu/effort-reporting>

Effort Reporting FAQ's: <https://controller.gwu.edu/labor-effort>

Effort Reporting Cycle and Labor Cost Transfer Process (link under Labor & Effort):

<https://controller.gwu.edu/labor-effort>

## GW Effort Certification Overview

Effort reporting is the process by which the University determines and documents the effort expended on sponsored agreements during each reporting period. Effort is the relative amount of time spent on a particular activity and it includes time spent working on a sponsored project in which salary is directly charged or contributed (cost-shared effort). Employees compensated in whole or in part by sponsored agreements must verify their effort. GW utilizes the Banner 9 system for both Effort Reporting and Labor Redistribution and both modules are integrated.

This user guide is designed to provide instructions to GW Department Administrators on how to use the automated Effort Reporting module to review, process and certify effort reports. In this module, Department Administrators are assigned the roles of Pre-reviewer and Alternate Certifier.

### Effort Reporting Phases

GW's Effort Certification process consists of the following two phases:

1. **Pre-Review** – in this first phase, the designated pre-reviewer(s) or pre-reviewer's proxy will review the effort report before it is certified, to ensure that the effort outlined in the report is accurate. This step must be completed before the employee/researcher or alternate certifier can certify the report.
2. **Certify** – this is the second phase of the process, where the employee who has worked on a sponsored project during the effort reporting period, will review and certify his/her report or request changes if they are needed. In the event that the employee is not available to certify the report, a proxy for the certifier, an alternate certifier, or a proxy for the alternate certifier can certify the report.

### Effort Reporting Roles

One or more of the following roles will be assigned to users in the system:

- **Pre-Reviewer** – typically the department administrator, who will review the assigned effort reports during the pre-review period to ensure accuracy of efforts.
- **Certifier** – employee or researcher who certifies the report after it is reviewed
- **Alternate Certifier** – someone other than the employee who is designated to certify an effort report and who has the knowledge of the work performed
- **Proxy** – someone assigned by a pre-reviewer, certifier or alternate certifier to review or act on behalf of the assignor. The proxy needs to have knowledge of the work performed for the effort reports he/she will be reviewing or certifying.

## Overview of the Effort Report Page

The Effort Report page is comprised of the following sections, as shown below:

The screenshot shows a web browser window with the URL [bssoweb.test.gwu.edu:8031/EmployeeSelfService/ssb/effortReporting#/effortReportDetails](https://bssoweb.test.gwu.edu:8031/EmployeeSelfService/ssb/effortReporting#/effortReportDetails). The page title is "Effort Report". The navigation bar includes "Employee Dashboard", "Effort Certification", and "Effort Report". The main content area has four tabs: "Effort Report", "Pay Period Summary", "Comments", and "Routing Queue". The "Effort Report" tab is active. Below the tabs, there are two sections: "Sponsored" and "Non Sponsored". Each section has a table with columns for Grant, Organization, Effort Category, Charge Type, and Effort. The "Sponsored" section shows a total of 10% activity, and the "Non Sponsored" section shows a total of 90% activity. On the right side, there is an "Effort Report Overview" sidebar with a "Report Status" section showing "2019-03", "2019 Fall Effort Cycle", "June 08, 2020 - June 30, 2020", and "Under Review - Unlocked". Below that is an "Important Dates" section with "Begin Pre-Review" on "June 01, 2020", "Certification Period" from "June 08, 2020 to June 30, 2020", and "Post Review End".

- The **Effort Report** tab consists of the following two sections
  - Sponsored section – summary of effort for sponsored activities
  - Non Sponsored section – summary of effort for non-sponsored activities
- The **Pay Period Summary** tab – provides details on the pay periods included in the certification period
- The **Comments** tab – provides the ability to add comments and to view comments previously added
- The **Routing Queue** tab – outlines the status of each stage of the Effort Certification process and the personnel assigned to each role
- The **Effort Report Overview** – gives a summary of the report status and dates for the effort certification period. The Funding Chart provides a graphical representation of the effort for that period.

Outlined below are the different types of status and states that a pre-reviewer, certifier, alternate certifier or proxy may see:

### Status

- Under Review – Effort report created and ready for review
- Awaiting Certification – Effort report is pre-reviewed and ready to be certified
- Completed – Effort report has been certified and completed
- Awaiting Refresh – Payroll action or labor redistribution has been completed

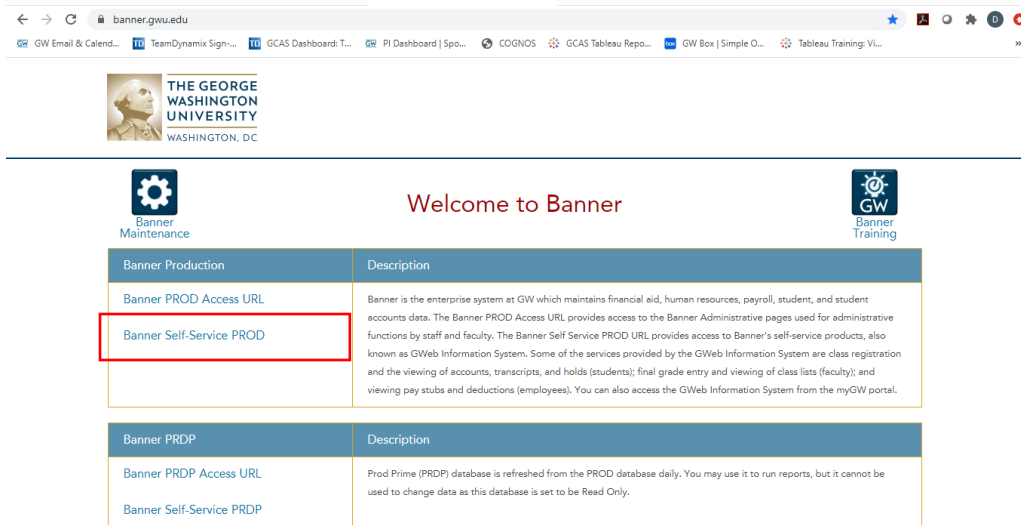
### State

- Unlocked – Effort report available to be reviewed, certified for changed by a member of the routing queue
- Locked – Effort report can no longer be updated; all action buttons are removed
- Changes Submitted – changes have been submitted to an authorized person to request changes to the labor distribution via the labor redistribution module. Once those changes are complete the status will change to 'Awaiting Refresh'.

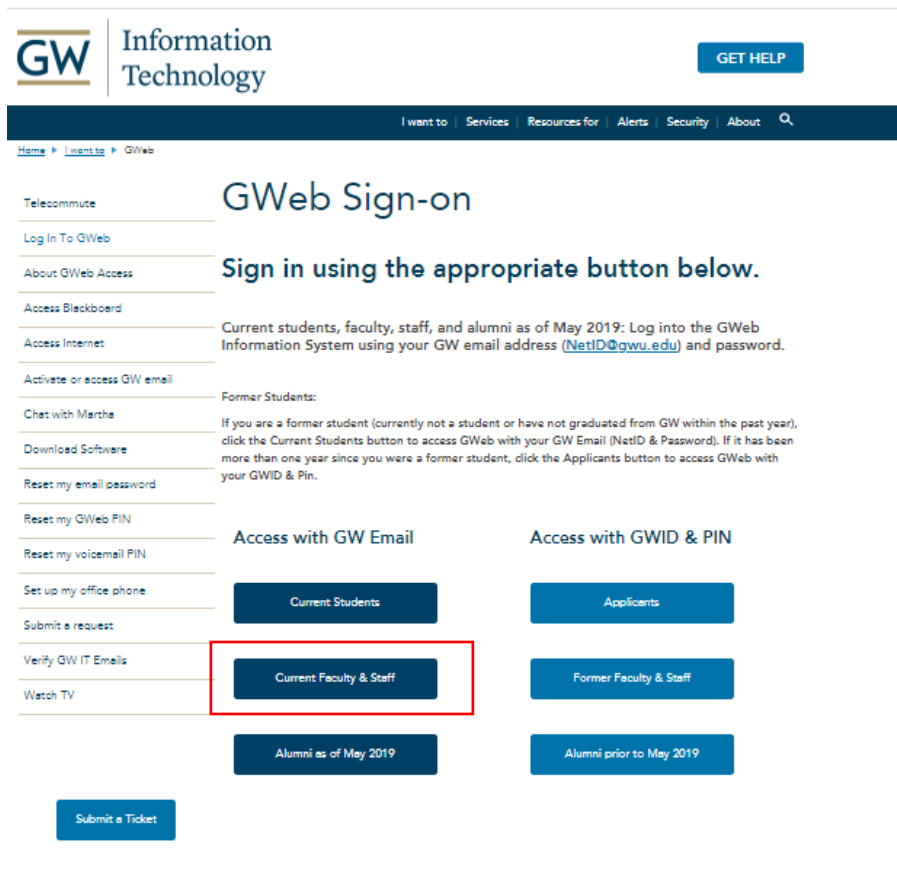
# Logging Into the System

To access the Banner 9 Effort Reporting system follow the steps below:

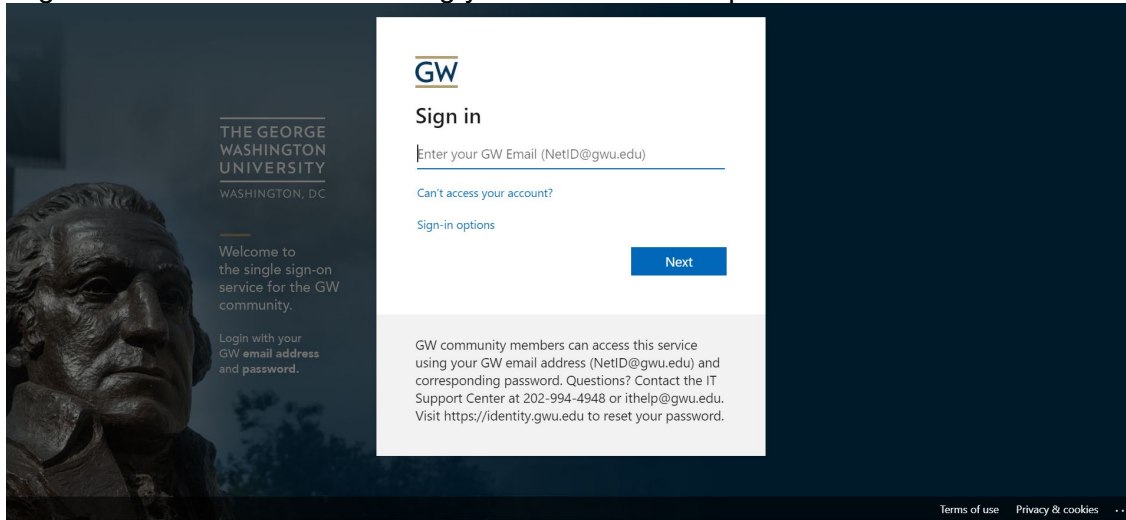
- Click on this link to go to Banner Self Service in Production - <https://banner.gwu.edu/>
- Click on the **Banner Self Service PROD** link



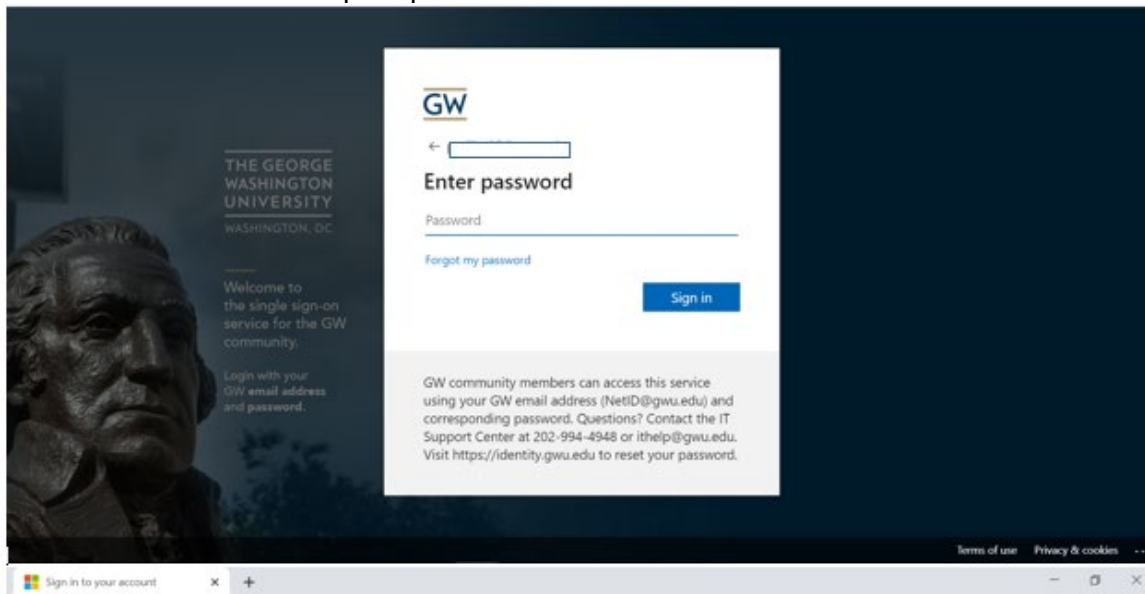
- From the GWeb Sign-on page, click on the **Current Faculty & Staff** button



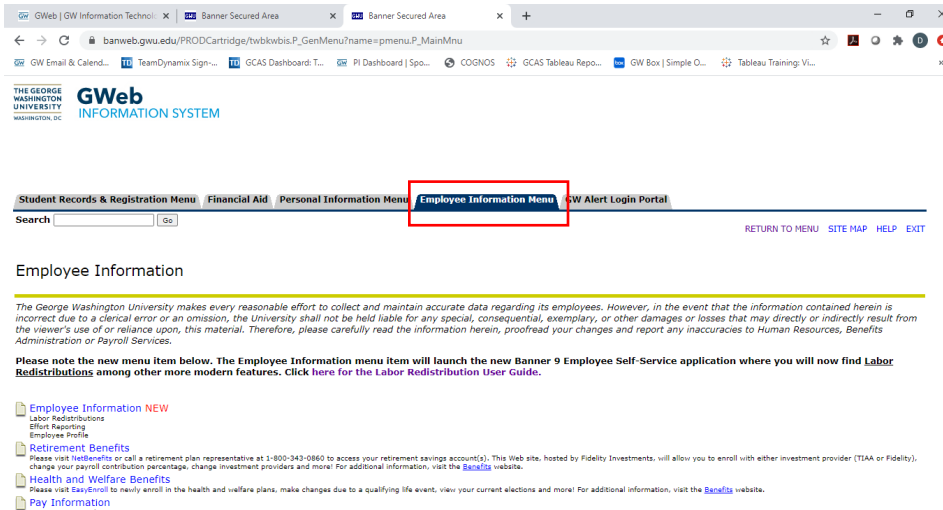
- Login to Banner Self Service using your GW NetID and password



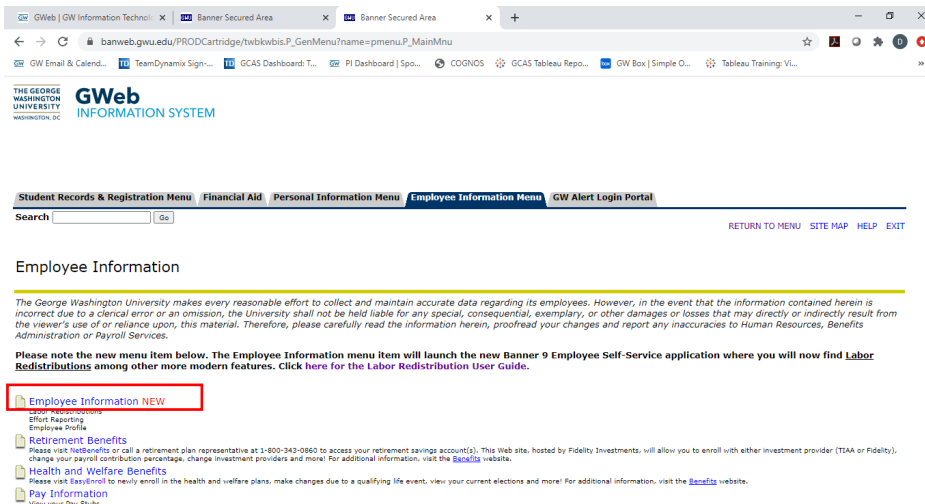
- Enter your password (this will be the same password you use for email) and then enter your 2-Factor-Authentication code when prompted



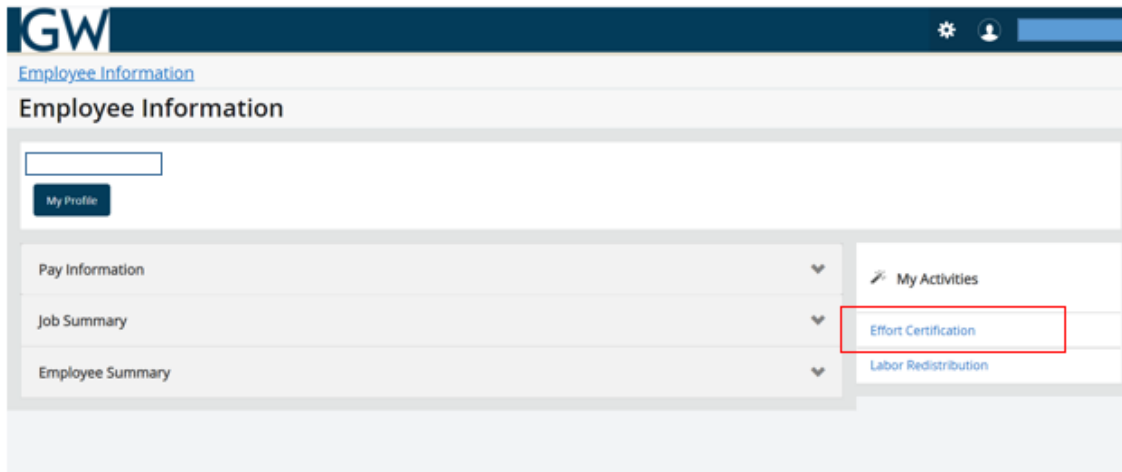
- After logging into Banner, click on the **Employee Information Menu** tab



- From the **Employee Information** page, click on the **Employee Information NEW** link




- Click on the **Effort Certification** link

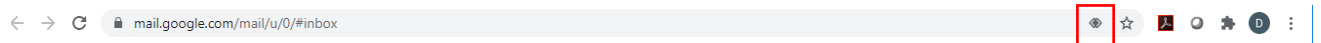


# Email Notification Configuration

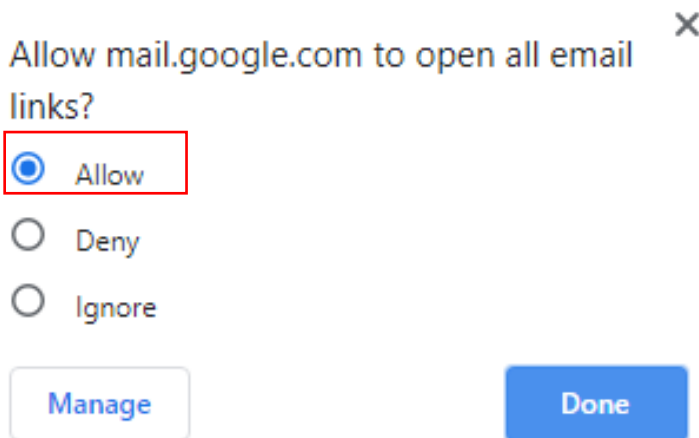
## To Configure the Email Handler in Chrome

To configure the settings in the email handler in Chrome to receive email alerts/notifications and to open the email window when you click on the **Request Changes** button to start the Labor Redistribution process, please follow the steps below *(if you have not previously done this configuration)*:

1. Open a Chrome browser window
2. Locate the horizontal ellipsis ( ⋮ ) in the upper right hand corner of the browser window. (If you position your mouse over it you will see the label “Customize and control Google Chrome”). Click on it
3. Click on **Settings**
4. Scroll down to the **Privacy and Security** section
5. Click on the arrow next to **Site Settings**
6. Scroll down on the page and click on **Additional permissions**
7. Scroll down to **Handlers** and click the arrow next to it
8. Move the slide bar to the right to “Allow sites to become default handlers for protocols”
9. Open a new GW email window in Chrome
10. Within the URL window, an eye looking icon will appear - . Click on that icon

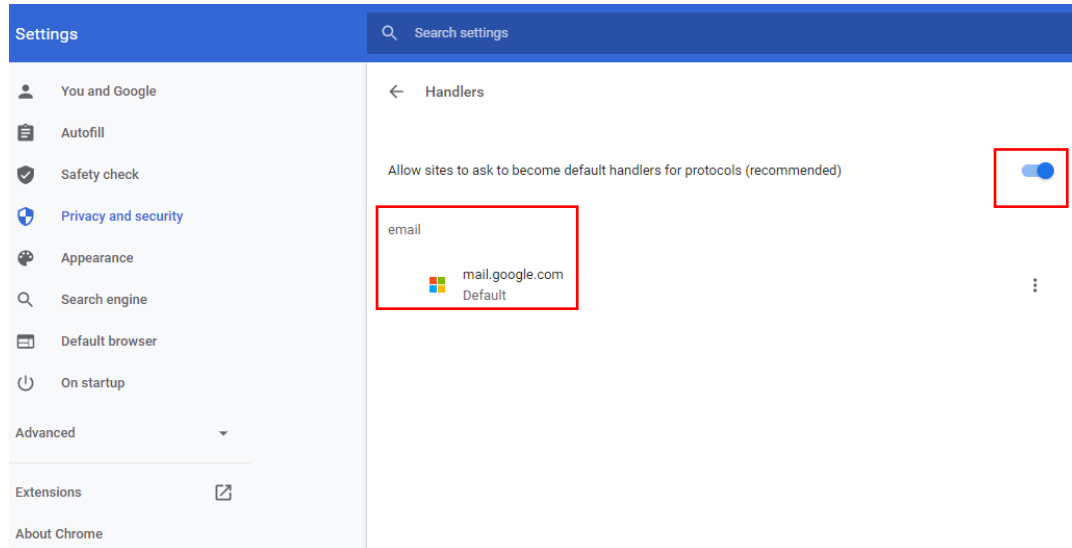


11. From the new window that appears, Select **Allow** then click **Done** to allow mail.google.com to open all email links



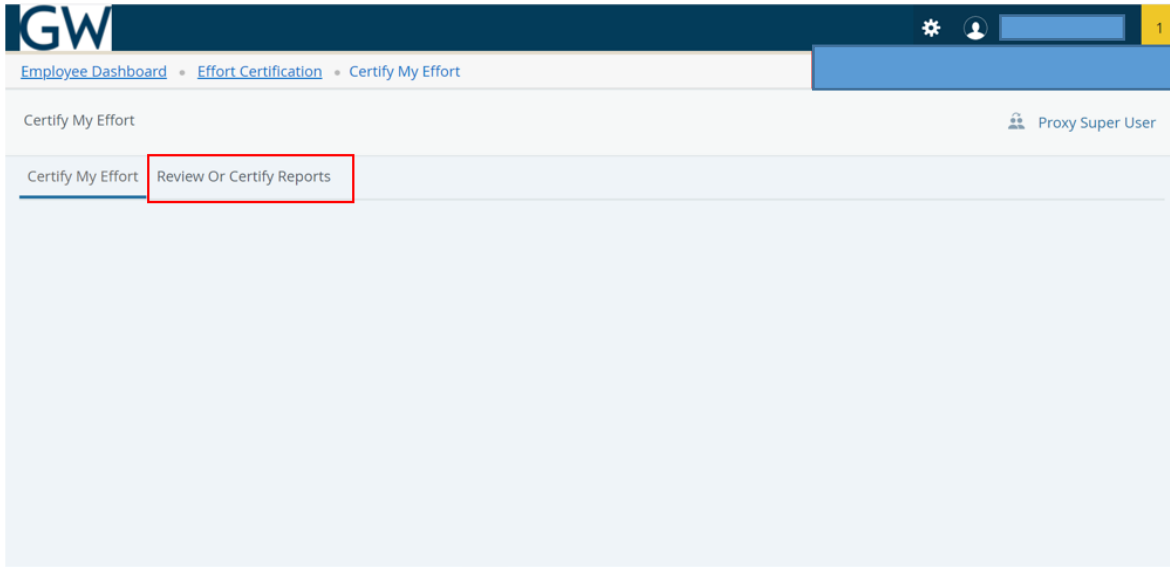
## To Confirm the Email Notification Settings

- Follow steps 1-7 above
- The slide bar for “Allow sites to become default handlers for protocols” should now be on the right
- The section under “email” should now say (as shown below): **mail.google.com**  
**Default**

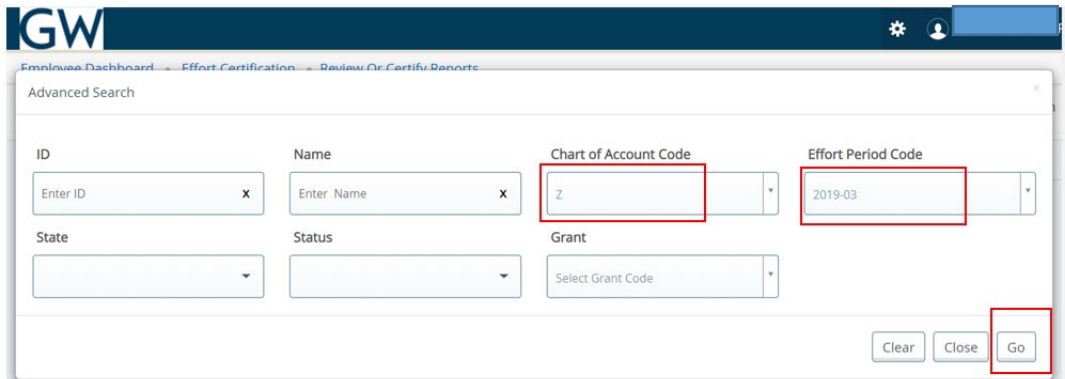


## Steps to Pre-Review an Effort Report

To access and review effort reports assigned to you, login to Effort Reporting system and click on **Review or Certify Reports** from the **Certify My Effort** screen, then follow the steps below:



- Select and Review Effort report(s)
  - From the **Advanced Search** screen, Select **'Z'** in the **Chart of Account Code** box, select the Effort Reporting period in the **Effort Period Code** box and then click on the **Go** button



- This will open your queue and show a list of the effort reports assigned to you for Pre-review. Double click on the one you want to review.

COA	Period Code	Period Description	Name	ID	Start Date	End Date	Status	Unlocked/Locked	Comments
Z	2019-03	2019 Fall Effort Cycle			06/08/2020	06/30/2020	Under Review	Changes Submitted	
Z	2019-03	2019 Fall Effort Cycle			06/08/2020	06/30/2020	Under Review	Changes Submitted	
Z	2019-03	2019 Fall Effort Cycle			06/08/2020	06/30/2020	Under Review	Changes Saved	
Z	2019-03	2019 Fall Effort Cycle			06/08/2020	06/30/2020	Under Review	Changes Submitted	
Z	2019-03	2019 Fall Effort Cycle			06/08/2020	06/30/2020	Under Review	Unlocked	

- Review the information in both the Sponsored and Non-Sponsored sections and the associated effort percent.

Grant	Organization	Effort Category	Charge Type	Effort
		SPONS	DIRECT	10

Total Sponsored Activity 10%

Grant	Organization	Effort Category	Charge Type	Effort
			DIRECT	90

Total Non-Sponsored Activity 90%

**Effort Report Overview**

**Report Status**

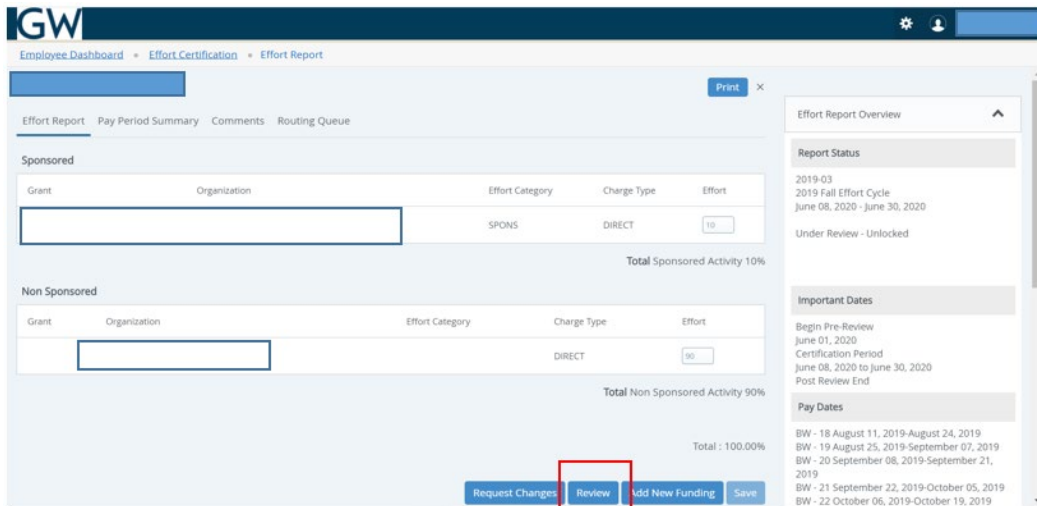
2019-03  
2019 Fall Effort Cycle  
June 08, 2020 - June 30, 2020

Under Review - Unlocked

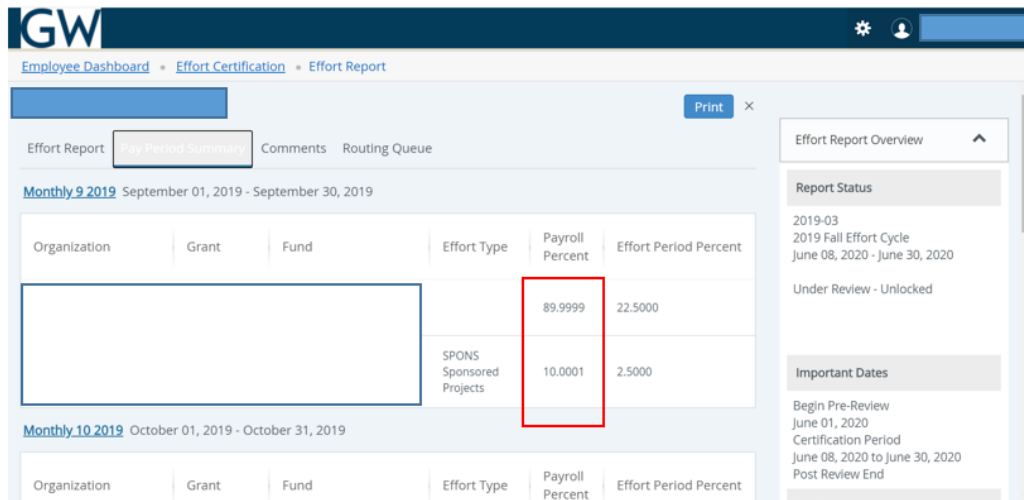
**Important Dates**

Begin Pre-Review  
June 01, 2020  
Certification Period  
June 08, 2020 to June 30, 2020  
Post Review End

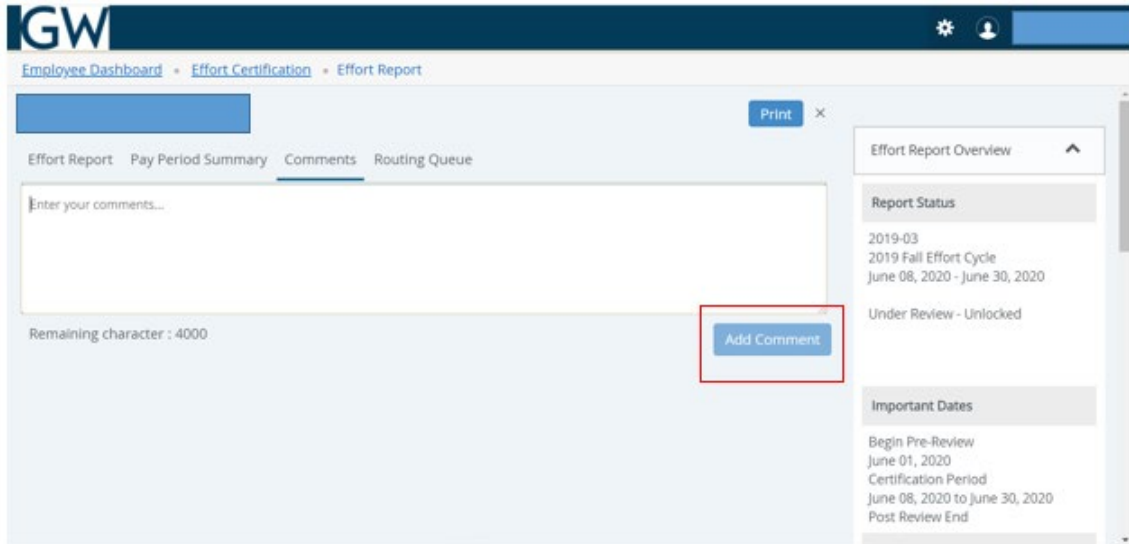
- If the Effort is correct, click on the **Review** button.



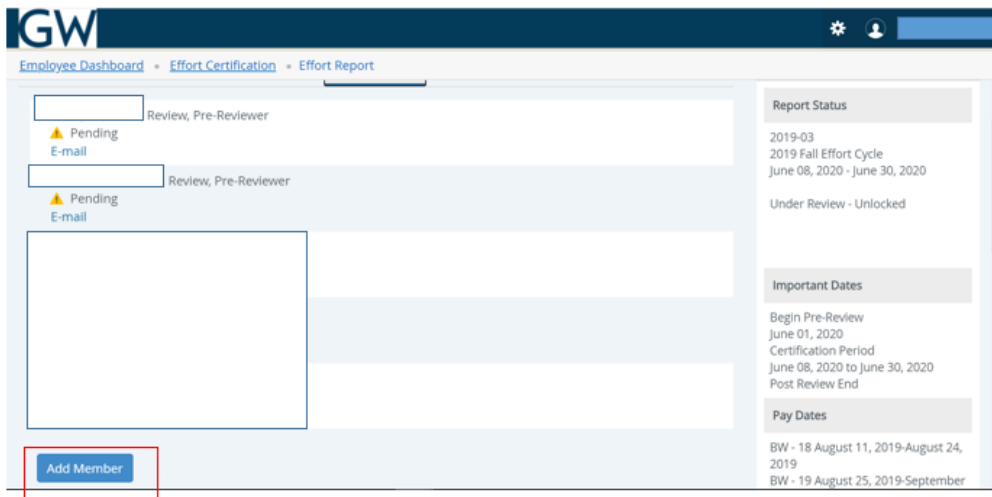
- If the Effort report **is not correct**, a labor redistribution will need to be done to correct the effort report and this will restart the Pre-review process.
  - If you are not able to process the Labor Redistribution, you can click on the “**Request Changes**” button, which will launch a new email window for you to send an email with the desired changes to your Department Administrator, who will process the labor redistribution in the Labor Redistribution module. This will change the effort report status to ‘Changes Submitted’. *If this email window does not appear, follow the instructions in the Email Notification Configuration section on pages 9 & 10, then click on the Request Changes button to send the email.*
- Review an Effort Report Pay Period Summary
  - To view specific payroll activity on an assigned effort report, click on the **Pay Period Summary** tab



- Add Comments to an Effort Report
  - To add or view comments, click on the **Comments** tab. You will be able view any comments that have been added by other members of the Routing Queue. If you add a comment, it will be saved and available to be viewed by any member of the Routing Queue. Once comments are added, they cannot be updated or deleted.



- Review an Effort Report Routing Queue
  - To view the progress and details of the effort certification process for a specific effort report, click on the **Routing Queue** tab. You will see the status of each stage of the process. The queue will be updated automatically after each queue member completes his/her task.
- Add an additional Pre-Reviewer to Review an Effort Report
  - If you need to add a person to the routing queue as a Pre-reviewer, click on the **Add Member** button at the bottom left corner of the Routing Queue screen. Please note that all pre-reviewers must review the report (check the report and click on the **Review** button) before it can be certified.

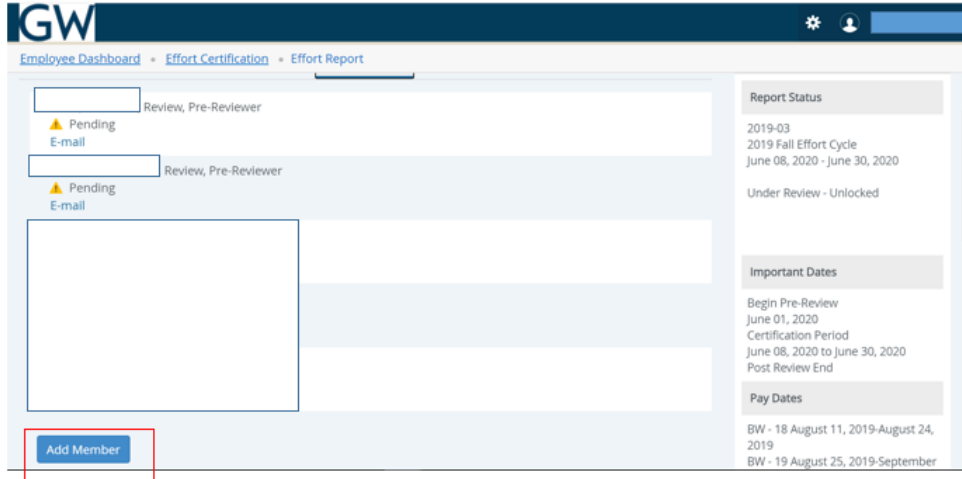


- Then Click on the ellipses (...) to the right of the **Name** field to search for the person to be added

- Once the person has been selected, Select **Pre-Reviewer** as the **Role**, **Review** as the **Action** and then click on the **Save** button.

- Add an Alternate Certifier to Certify an Effort Report

- If you need to add a person to the routing queue as an Alternate Certifier to certify an assigned report, click on the **Add Member** button at the bottom left corner of the Routing Queue screen.



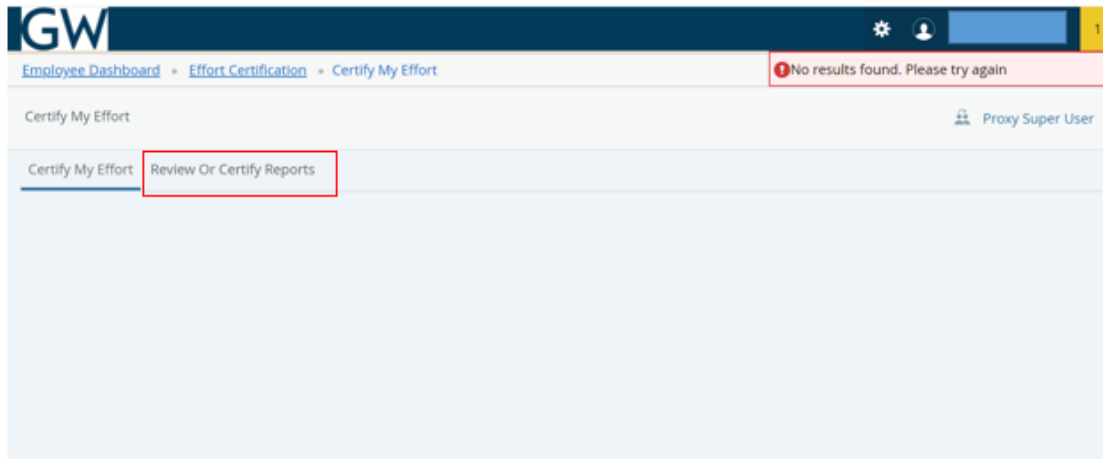
- Then Click on the ellipses (...) to the right of the **Name** field to search for the person to be added
- Once the person has been selected, Select **Alternate Certifier** as the **Role**, **Certify** as the **Action** and then click on the Save button.

- Unlock Locked Effort Reports

- If you discover an error in an Effort Report after it has been certified, and you need it unlocked and re-processed, send an email to [effort@gwu.edu](mailto:effort@gwu.edu)

## Steps for Alternate Certifiers to Certify an Effort Report

To access and review effort reports assigned to you, login to Effort Reporting system, click on **Review or Certify Reports** under the **Effort Certification** tab and follow the steps below.



- Select and Review Effort report(s)
  - From the **Advanced Search** screen that appears, Select **'z'** in the **Chart of Account Code** box, enter the effort reporting period in the **Effort Period Code** box then click on the **Go** button. You can select a status of 'Awaiting Certification' to further drill down the query results.

The screenshot shows the 'Advanced Search' form. The 'Chart of Account Code' field contains 'z' and the 'Effort Period Code' field contains '2019-03'. The 'Go' button is highlighted with a red box.

- The effort reports assigned for you to Certify will be listed in your queue with a status of 'Awaiting Certification'. Double click on the one you want to certify

The screenshot shows the 'Effort List' table with the following data:

COA	Period Code	Period Description	Name	ID	Start Date	End Date	Status	Unlocked/ Locked	Comments
Z	2019-03	2019 Fall Effort Cycle			06/08/2020	06/30/2020		Changes Submitted	
Z	2019-03	2019 Fall Effort Cycle			06/08/2020	06/30/2020		Changes Submitted	
Z	2019-03	2019 Fall Effort Cycle			06/08/2020	06/30/2020		Changes Saved	
Z	2019-03	2019 Fall Effort Cycle			06/08/2020	06/30/2020		Changes Submitted	
Z	2019-03	2019 Fall Effort Cycle			06/08/2020	06/30/2020		Unlocked	

- Review the information in both the Sponsored and Non-Sponsored sections and the associated effort percent.

Employee Dashboard » Effort Certification » Effort Report

Print

Effort Report Pay Period Summary Comments Routing Queue

**Sponsored**

Grant	Organization	Effort Category	Charge Type	Effort
		SPONS	DIRECT	10

Total Sponsored Activity 10%

**Non Sponsored**

Grant	Organization	Effort Category	Charge Type	Effort
			DIRECT	90

Total Non Sponsored Activity 90%

**Effort Report Overview**

**Report Status**

2019-03  
2019 Fall Effort Cycle  
June 08, 2020 - June 30, 2020  
Under Review - Unlocked

**Important Dates**

Begin Pre-Review  
June 01, 2020  
Certification Period  
June 08, 2020 to June 30, 2020  
Post Review End

- Review the Effort Report Pay Period Summary
  - To view specific payroll activity on an assigned effort report, click on the **Pay Period Summary** tab

Employee Dashboard » Effort Certification » Effort Report

Print

Effort Report **Pay Period Summary** Comments Routing Queue

**Monthly 9 2019** September 01, 2019 - September 30, 2019

Organization	Grant	Fund	Effort Type	Payroll Percent	Effort Period Percent
				89.9999	22.5000
			SPONS Sponsored Projects	10.0001	2.5000

**Monthly 10 2019** October 01, 2019 - October 31, 2019

Organization	Grant	Fund	Effort Type	Payroll Percent	Effort Period Percent
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**Effort Report Overview**

**Report Status**

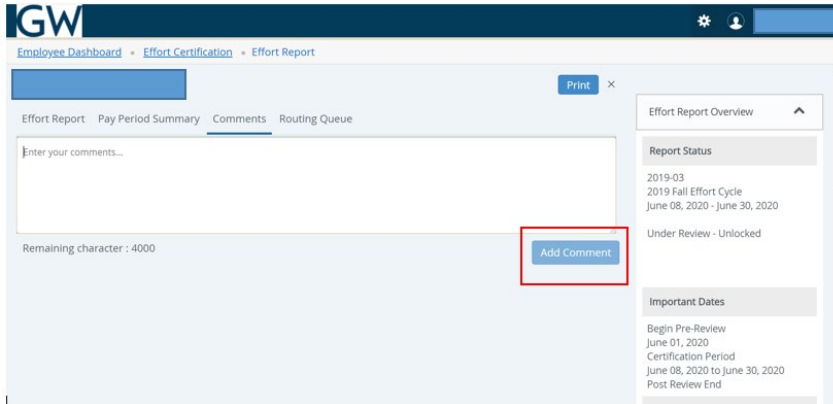
2019-03  
2019 Fall Effort Cycle  
June 08, 2020 - June 30, 2020  
Under Review - Unlocked

**Important Dates**

Begin Pre-Review  
June 01, 2020  
Certification Period  
June 08, 2020 to June 30, 2020  
Post Review End

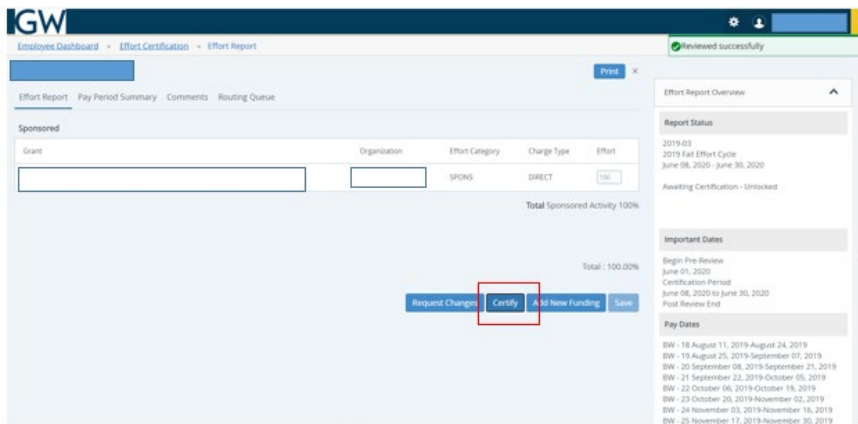
- Add Comments to an Effort Report

- To add or view comments, click on the **Comments** tab. You will be able view any comments that have been added by other members of the Routing Queue. If you add a comment, it will be saved and available to be viewed by any member of the Routing Queue. Once comments are added, they cannot be updated or deleted.

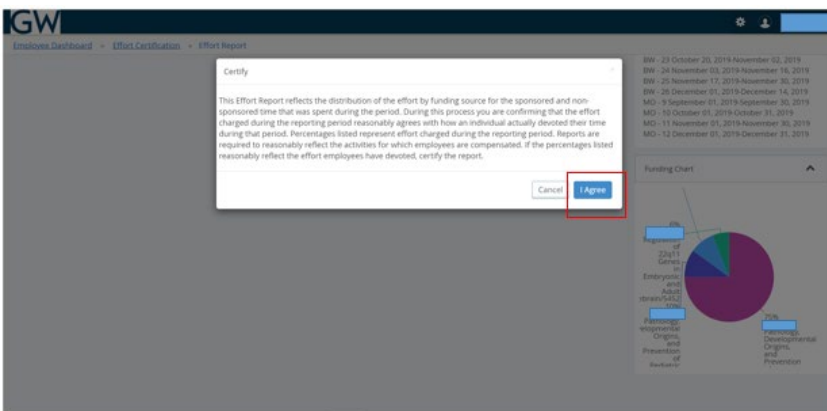


- Certify the Effort Report

- If the Effort is correct, then click on the **Certify** button.



- From the **Certify** screen click on the **I Agree** button to agree to the certification

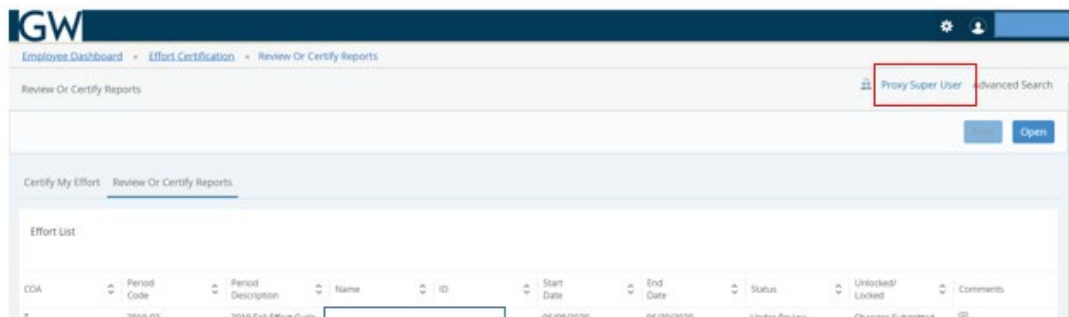


- If the Effort report **is not correct**, a labor redistribution will need to be done to correct the effort report and this will restart the Pre-review process.
  - If you are not able to process the Labor Redistribution click on the **“Request Changes”** button, which will launch a new email window for you to send an email with the desired changes to your Department Administrator, who will process the labor redistribution in the Labor Redistribution module. This will change the effort report status to ‘Changes Submitted’. *If this email window does not appear, follow the instructions in the Email Notification Configuration section on page 9, then repeat this step to send the email.*
- This will restart the Pre-review process.
- If you have questions, contact GCAS-Effort Reporting at [effort@gwu.edu](mailto:effort@gwu.edu)

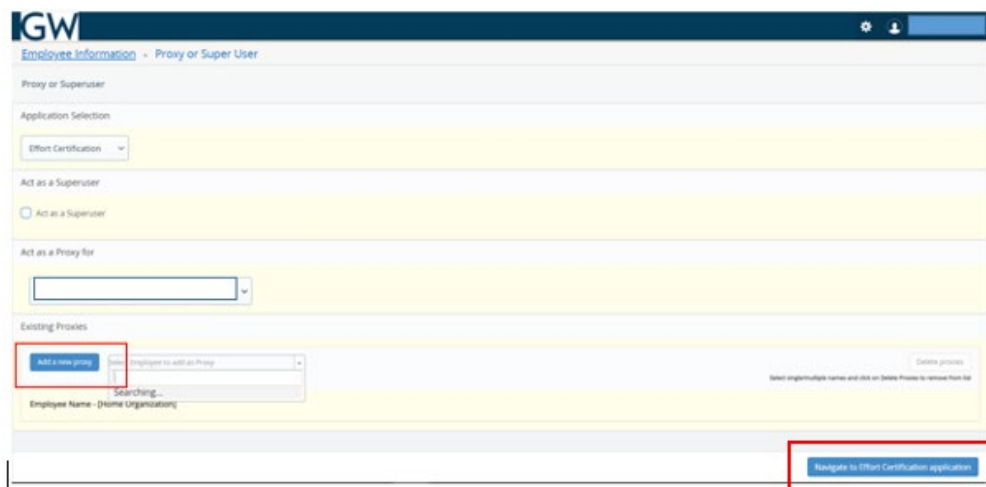
## Adding a Proxy

A proxy is someone who can act on your behalf in the Effort Certification process. To add a proxy, follow the steps below:

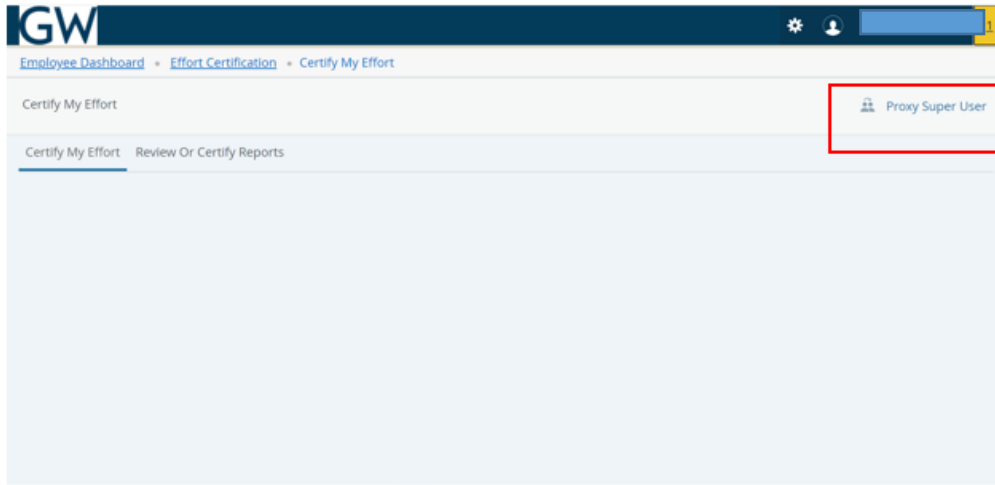
- From the **Review or Certify Reports** page, click on the **Proxy Super User** link in the upper right corner of the page.



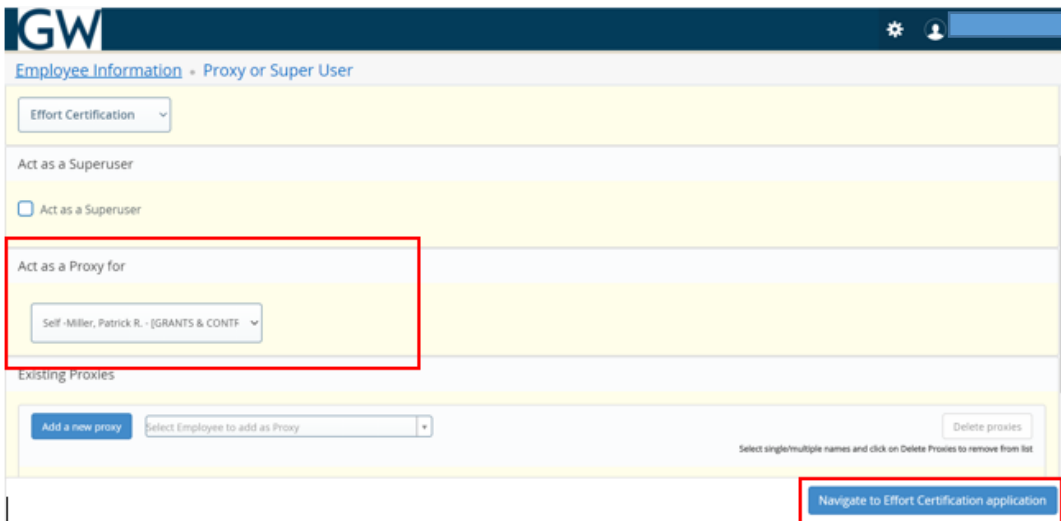
- Click on the **Add New Proxy** then click in the box **Select Employee to add as Proxy**. Begin typing the name of the person you want to assign as a proxy on your behalf. Select the person’s name when it is displayed. *(If the person’s name does not appear, then he/she does not have the proper Banner access)*. That person will then be listed as a proxy in the **Existing Proxies** section. Click on the check box next to the person’s name to activate that person to be a proxy on your behalf. Then click on the **Navigate to Effort Certification application** button to go back to your queue.



- For your proxy to see the effort reports assigned to you, your proxy will need to login to the Effort Reporting Module and follow the two steps outlined below:
  - First, your proxy should click on the **Proxy Super User** link as shown below



- Next your proxy will need to select your name from the dropdown list in the **Act as a Proxy for** section, as shown below, and then click on the **Navigate to Effort Certification application** button to see the effort reports in your queue. After completing these two steps, your proxy will not see reports in his/her regular queue, only the reports in your queue will be visible. These two steps will need to be repeated by your proxy whenever he/she logs into the Effort Reporting module/application and needs to act as your proxy and see the effort reports in your queue.



# Processing a Labor Redistribution

If a payroll percentage is incorrect during your review of the effort percentages on the **Effort Report** tab or the **Pay Period Summary** tab in the Effort Reporting Module, please follow the steps below:

1. From the Effort Reporting Module, once you have reviewed and are ready for next steps, Select the Effort Report Tab

The screenshot shows the GW Effort Reporting Module interface. The 'Effort Report' tab is highlighted with a red box. The interface displays a table for 'Sponsored' activity with columns for Grant, Organization, Effort Category, Charge Type, and Effort. The 'Effort' column shows a value of 95. Below this, it indicates 'Total Sponsored Activity 95%'. A 'Non Sponsored' section shows a value of 5 and 'Total Non Sponsored Activity 5%'. At the bottom, the total is 'Total : 100.00%'. A 'Request Changes' button is visible at the bottom of the table area. On the right side, there is a sidebar with 'Effort Report Overview', 'Report Status', 'Important Dates', and 'Pay Dates' sections.

2. Click on the **Request Changes** button. Clicking on this button will bring up a new email window that you can fill out and to send an email to the appropriate person to start the labor redistribution as needed. *If this email window does not appear, follow the instructions in the Email Notification Configuration document then repeat this step to send the email.*

This screenshot is identical to the one above, but the 'Request Changes' button at the bottom of the table area is highlighted with a red box. The rest of the interface, including the tables and sidebar, remains the same.

- After clicking the Request Changes button and sending the email, the status of the effort report will also change from 'Under Review – Unlocked' to 'Under Review - Changes Submitted'.

Employee Dashboard » Effort Certification » Effort Report

You are acting as Superuser

Print

Effort Report Overview

Report Status

2019-03  
2019 Fall Effort Cycle  
June 08, 2020 - July 17, 2020

**Under Review - Changes Submitted**

Changed by Jones, Mary E.

Important Dates

Begin Pre-Review  
June 01, 2020  
Certification Period  
June 08, 2020 to July 17, 2020  
Post Review End

Pay Dates

BW - 18 August 11, 2019-August 24, 2019  
BW - 19 August 25, 2019-September 07, 2019  
BW - 20 September 08, 2019-

Total Sponsored Activity 100%

Total : 100.00%

Clear Changes Save

- Now when you go back to see what is in your queue, the individual(s) that you just requested changes for show up as **Changes Submitted** under the **Unlocked/Locked** column. Now the labor redistribution can be processed.

Employee Dashboard » Effort Certification » Review Or Certify Reports

You are acting as Proxy Super User

Review Or Certify Reports

Print Open

Certify My Effort Review Or Certify Reports

Effort List

COA	Period Code	Period Description	Name	ID	Start Date	End Date	Status	Unlocked/Locked	Comments
Z	2019-03				06/08/2020	07/17/2020	Under Review	<b>Changes Submitted</b>	
Z	2019-03				06/08/2020	07/17/2020	Under Review	Changes Submitted	
Z	2019-03				06/08/2020	07/17/2020	Awaiting Certification	Unlocked	
Z	2019-03				06/08/2020	07/17/2020	Under Review	Unlocked	
Z	2019-03				06/08/2020	07/17/2020	Under Review	Unlocked	
Z	2019-03				06/08/2020	07/17/2020	Under Review	Unlocked	
Z	2019-03				06/08/2020	07/17/2020	Under Review	Unlocked	
Z	2019-03				06/08/2020	07/17/2020	Under Review	Unlocked	
Z	2019-03				06/08/2020	07/17/2020	Under Review	Unlocked	
Z	2019-03				06/08/2020	07/17/2020	Under Review	Changes Submitted	

5. Login to the Labor Redistribution Module. From the labor distribution screen enter the GWID of the individual for whom you are processing the LR, and click on **Go**

The screenshot shows the 'Person Search' dialog box with the following fields:

- ID: Enter ID (highlighted with a red box)
- Name: Enter Name
- Pay ID: Enter Pay ID
- From Pay Year: Enter From Pay Year
- From Pay Number: Enter From Pay Number
- To Pay Year: Enter To Pay Year
- To Pay Number: Enter To Pay Number
- Disposition: Select a Disposition

Buttons: Clear, Close, Go (highlighted with a red box)

6. The individual's pay period information will be displayed. Select the period for which you want to make your change.

The screenshot shows the 'Person Search Results' table with the following columns: Select, Batch ID, Name, ID, Pay Year, Pay ID, Pay Number, Sequence, Disposition, and Comments. The table contains 11 rows of data, all with a Disposition of '70, Complete'. The 'Name' column is obscured by a blue box.

Select	Batch ID	Name	ID	Pay Year	Pay ID	Pay Number	Sequence	Disposition	Comments
<input type="checkbox"/>				2019	MO	8	3	70, Complete	
<input type="checkbox"/>				2019	MO	8	5	70, Complete	
<input type="checkbox"/>				2019	MO	9	2	70, Complete	
<input type="checkbox"/>				2019	MO	10	2	70, Complete	
<input type="checkbox"/>				2019	MO	11	2	70, Complete	
<input type="checkbox"/>				2019	MO	12	2	70, Complete	
<input type="checkbox"/>				2020	MO	1	2	70, Complete	
<input type="checkbox"/>				2020	MO	2	2	70, Complete	
<input type="checkbox"/>				2020	MO	3	2	70, Complete	
<input type="checkbox"/>				2020	MO	4	0	70, Complete	
<input type="checkbox"/>				2020	MO	5	0	70, Complete	

Results found: 11

Page 1 of 1 Per Page 50

7. Make the appropriate changes the click on the **Ok changes**, and wait for all approvals in the routing queue to be completed

Update Distributions

COA: Z Posting Date: 07/09/2020  Change All

Index	Fund	Orgn	Account	Program	Hours	Percent	Amount
▼				INS	7.61	5.00%	520.83
▼				SP1	144.64	95.00%	9,895.84

Current Summary: Hours: 152.25 Percentage: 100% Amount: \$10,416.67 Updated: Hours: 152.25 Percentage: 100% Amount: \$10,416.67

Buttons: Cancel Round Add Line OK Changes

Summary Panel:

- Amount: \$10,416.67
- Percent: 100.00%
- Originator: Copan, Deborah
- Posting Date: 12/23/2019

8. Once the labor redistribution has been submitted you can go back into the Effort Reporting module and the effort report status for that individual should be updated to reflect the following *'Pay events are in process that may affect this report'*

Effort Report

You are acting as Superuser

Print

Effort Report Overview

Report Status

2019-03  
2019 Fall Effort Cycle  
June 08, 2020 - July 17, 2020

Under Review - Changes Submitted

⚠ Pay events are in process that may affect this effort report.

Changed by Jones, Mary E.

Important Dates

Begin Pre-Review  
June 01, 2020  
Certification Period  
June 08, 2020 to July 17, 2020  
Post Review End

Pay Dates

BW - 18 August 11, 2019-August 24, 2019  
BW - 19 August 25, 2019-September 07, 2019

Total Sponsored Activity 100%

Total : 100.00%

Buttons: Clear Changes Save

9. Once the labor redistribution has been processed you can go back into the Effort Reporting module and the effort report status for that individual should be updated in your queue to reflect the following 'Awaiting Refresh'

Employee Dashboard • Effort Certification • Review Or Certify Reports

You are acting as Superuser

Review Or Certify Reports [Proxy Super User](#) [Advanced Search](#)

[Print](#) [Open](#)

Certify My Effort Review Or Certify Reports

Effort List

COA	Period Code	Period Description	Name	ID	Start Date	End Date	Status	Unlocked/Locked	Comments
					06/08/2020	07/17/2020	Awaiting Refresh		Changes Submitted

Results found: 1

Page 1 of 1 Per Page 50

10. You can now update the report by clicking on the **Update Report** button and then verify the changes have been applied to the effort report

Employee Dashboard • Effort Certification • Effort Report

You are acting as Superuser

[Print](#) x

Effort Report Pay Period Summary [Comments](#) [Routing Queue](#)

Sponsored

Grant	Organization	Effort Category	Charge Type	Effort
		SPONS	DIRECT	100

Total Sponsored Activity 100%

Total : 100.00%

[Clear Changes](#) [Save](#)

[Update Report](#)

Effort Report Overview

Report Status

2019-03  
2019 Fall Effort Cycle  
June 08, 2020 - July 17, 2020

Awaiting Refresh - Changes Submitted

Changed by Jones, Mary E.

Important Dates

Begin Pre-Review  
June 01, 2020  
Certification Period  
June 08, 2020 to July 17, 2020  
Post Review End

Pay Dates

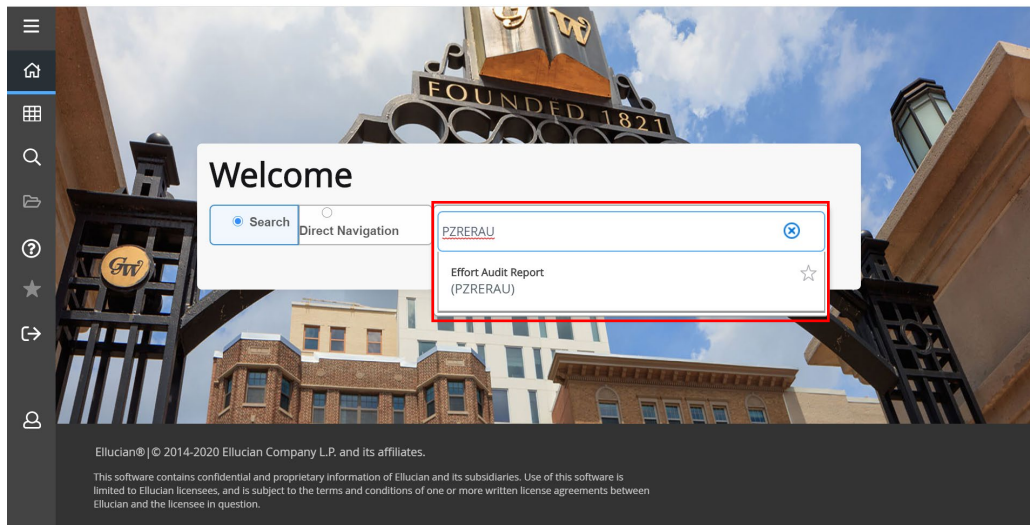
BW - 18 August 11, 2019-August 24, 2019

# Running the Audit Report (PZRERAU)

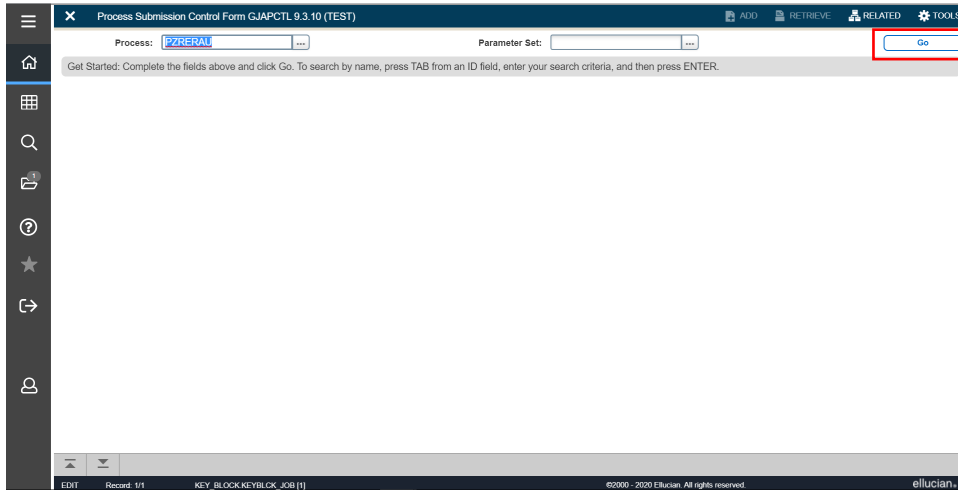
1. Click on this link to go to Banner Self Service in Production - <https://banner.gwu.edu/>
2. Click on Banner PROD Access URL

Banner Production	Description
<a href="#">Banner PROD Access URL</a>	Banner is the enterprise system at GW which maintains financial aid, human resources, payroll, student, and student accounts data. The Banner PROD Access URL provides access to the Banner Administrative pages used for administrative functions by staff and faculty. The Banner Self Service PROD URL provides access to Banner's self-service products, also known as GWeb Information System. Some of the services provided by the GWeb Information System are class registration and the viewing of accounts, transcripts, and holds (students); final grade entry and viewing of class lists (faculty); and viewing pay stubs and deductions (employees). You can also access the GWeb Information System from the myGW portal.
<a href="#">Banner Self-Service PROD</a>	
Banner PRDP	Description
<a href="#">Banner PRDP Access URL</a>	Prod Prime (PRDP) database is refreshed from the PROD database daily. You may use it to run reports, but it cannot be used to change data as this database is set to be Read Only.
<a href="#">Banner Self-Service PRDP</a>	
Banner PRDQ	Description
<a href="#">Banner PRDQ Access URL</a>	Quality Control (PRDQ) database is refreshed from the PROD database daily. You may use it to test functionality in Banner and to test reports, but it should never be used to change data you wish to retain in Banner.
<a href="#">Banner Self-Service PRDQ</a>	
Banner PROD BAM	Description
<a href="#">Banner PROD BAM URL</a>	Banner Access Manager (BAM) for Distributed Security only

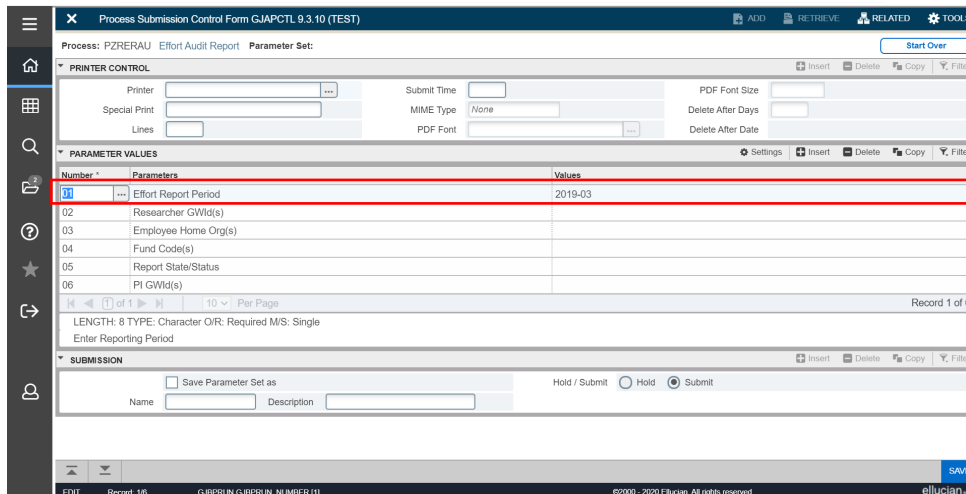
3. Type **PZRERAU** in the box as shown below and then click on **Effort Audit Report (PZRERAU)** to select it



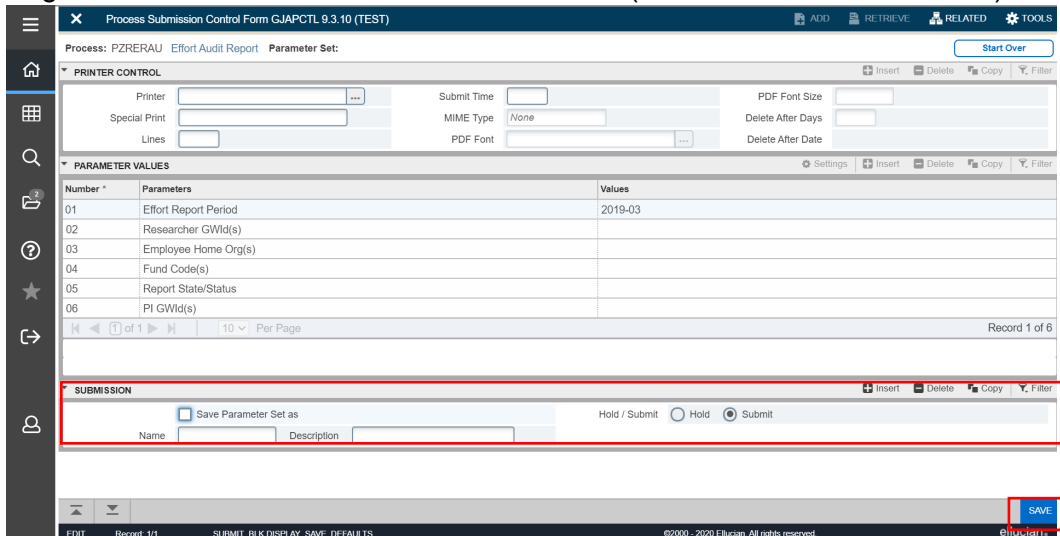
4. From the Process Submission Control Form, click on **Go**



5. Enter the Effort Report Period parameter by clicking on the box with the ellipses (...). You can also filter by selecting the other parameters (Researcher, Employee Home Orgs, Fund Codes, Report State/Status or PI GWId(s))



6. Page Down and click in the Submission section (this has to be done to Save), then click on **Save**



- To view the report, click on the **RELATED** link in the upper right section of the page then click on the **GZAPSTA Job Status Form**

Process Submission Control Form GJAPCTL 9.3.10 (TEST)

Process: PZRERAU Effort Audit Report Parameter Set:

PRINTER CONTROL

Printer: [ ] Submit Time: [ ] PDF Font Size: [ ]  
 Special Print: [ ] MIME Type: None Delete After Date: [ ]  
 Lines: [ ] PDF Font: [ ] Delete After Date: [ ]

PARAMETER VALUES

Number *	Parameters	Values
01	Effort Report Period	2019-03
02	Researcher GWId(s)	
03	Employee Home Org(s)	
04	Fund Code(s)	
05	Report State/Status	
06	PI GWId(s)	

SUBMISSION

Save Parameter Set as [ ] Hold / Submit:  Hold  Submit

Name: [ ] Description: [ ]

SAVE

- Select your report once it has finished running (once the status has changed from 'Running' to 'Finished') then click on **View Output**

Job Status GZAPSTA 9 0.15.g (TEST)

JOB STATUS

Settings Insert Delete Copy Filter

View Log View Output Download Output Grant / Revoke Refresh View File Size

Keep	Hide	Job Number	Job Description	Report Name	Status
<input type="checkbox"/>	<input type="checkbox"/>	8519806	Effort Audit Report	PZRERAU	RUNNING
<input type="checkbox"/>	<input type="checkbox"/>	8519590	Effort Audit Report	PZRERAU	RUNNING
<input type="checkbox"/>	<input type="checkbox"/>	8518984	Effort Audit Report	PZRERAU	FINISHED
<input type="checkbox"/>	<input type="checkbox"/>	8518948	Effort Audit Report	PZRERAU	FINISHED
<input type="checkbox"/>	<input type="checkbox"/>	8518932	Effort Audit Report	PZRERAU	FINISHED
<input type="checkbox"/>	<input type="checkbox"/>	8517560	Effort Audit Report	PZRERAU	FINISHED

Record 1 of 6

Owner: COMPRM Started Date: 08/04/2020 09:47:51 Finished Date: [ ] Job Type: G -

Status Message: [ ]

DETAILS

Default  Hidden Jobs  All Jobs

SAVE

9. Your output should be similar to what is displayed below

**THE GEORGE WASHINGTON UNIVERSITY**  
WASHINGTON, DC

The George Washington University Effort Report  
 Effort Period: 2019 Fall Effort Cycle  
 Bi-Weekly 2019 Periods 18 through 26 (08-11-2019 to 12-14-2019)  
 Monthly 2019 Periods 9 through 12 (09-01-2019 to 12-31-2019)

Home Org:

Researcher:

GWId: UNLOCKED

Status:

**Monthly Pay Period Summary**

Organization	Grant	Fund	Principle Investigator	Month				Effort Percent
				9	10	11	12	
				20.02%	19.46%	0.00%	0.00%	9.87%
				79.98%	80.00%	60.11%	100.00%	80.02%
				0.00%	0.00%	39.89%	0.00%	9.97%
				0.00%	.54%	0.00%	0.00%	.14%