Effort Certification Advisory Group

April 4, 2012
9-10:30
Today’s Agenda

• Welcome
• Timeline
• Previously Gathered Requirements
• Workflow
• User Interface for Certifier
• Functional Requirements
• Confirm Project Team for Next Phases of Project
• Adjourn
Effort Certification Discovery

Timeline

• November/December 2011
  – Formed the Effort Certification Advisory Group
  – Reviewed options for effort certification solutions
  – Advisory Group advised to proceed with discovery on Kuali Effort Certification

• January – March 2012
  – Individual interviews with various effort certification preparers, reviewers, and
    the effort certification system administrator (OFA)
  – Meetings with other offices who’s processes touch effort certification such as
    sponsored projects accounting, payroll services, and faculty affairs
  – Identify data interfaces with payroll, general ledger and other systems
  – Take the requirements gathered to date to pull together a rough draft of user
    interface and requirements for advisory group’s discussion and comments

• April 2012 – Spring 2013
  – After this meeting a project team will work with the business analyst to
    further refine the requirements to provide to programmers, assist with testing
    and rollout
Summary of Key Requirements

• USCnet ID login and instructions for how to retrieve forgotten login and passwords
• Very user friendly interface
• Improve reporting of outstanding certifications
• Be able to certify RA’s in a group view or one by one according to user’s preference
• Usable on multiple browsers
Summary of Key Requirements

- Effort must certify to 100% and present error message when it doesn’t equal 100%
- Role based (i.e. certifier, preparer, reviewer, system admin roles)
- Documents certifier’s original certification
- Take into account, the accounts that have cost sharing or salary cap
- Allow PI to preview and make corrections to effort of his/her exempt staff before each exempt staff person certifies his/her own effort
Summary of Key Requirements

• Improve accuracy of institutional base salary
• Exception handling for special certification circumstances such as separation from USC
Guiding Principles

• Provide user friendly interface for Certifiers
• Minimize number of clicks
• Start with what Kuali has out of the box and modify to meet requirements
Future Workflow

1. Certification period opens

2. Certifier will be notified to certify

3. If a PI Certifier or has been delegated to, certifies for RA’s as well

4. Certifier certifies for self and system records certification

5. If a preparer has been designated, s/he will prepare the certification(s)

6. Certifier certifies for self and system records certification

7. Certifier will be notified to certify

8. Certification period opens
Certifier User Interface – Rough Draft of Discussion

• Certifier user interface mock-up presentation, discussion, and feedback
Functionality Enhancements

• Assignment of:
  – Certifier to Preparer

• Delegation of:
  – Preparer to Preparer
  – Certifier to Certifier (for RAs)

• Better reporting
  – Outstanding certifications
  – Who is my preparer
  – Who have I delegated to?
Next Steps

• Please complete your feedback forms
• We will invite and convene project team
  – Develop/refine functional specification documents for programmers
  – Programming
  – Testing
  – Rollout