

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

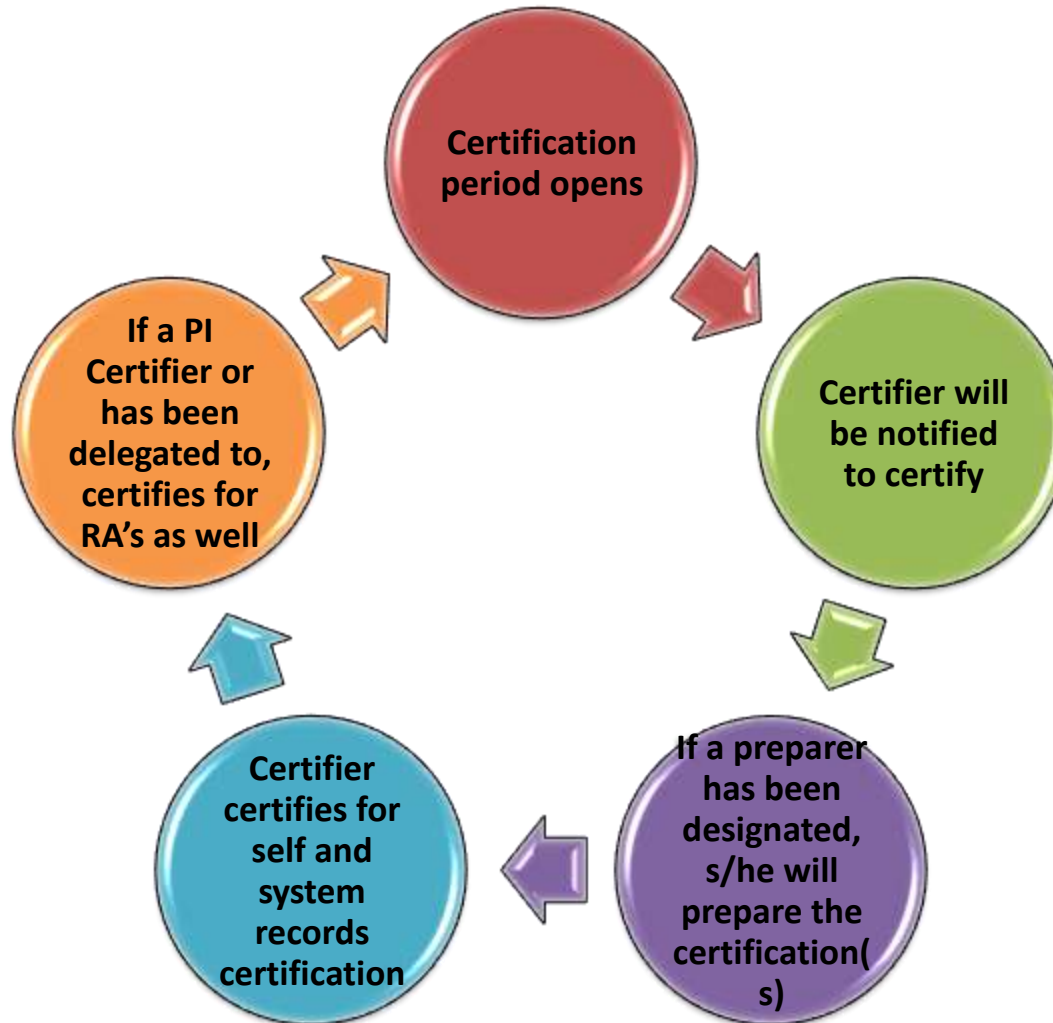
Summary of Key Requirements

- 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



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