

# Effort Certification Summary Reporting *in Argos*

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**Grants Accounting** at the University of Toledo is responsible for post-award grant administration and accounting functions. Effort reporting is a federally-mandated process used to confirm that the salaries and wages charged to each sponsored agreement are reasonable in relation to the actual work performed.

The actual **Online Effort Certification** system is where the reports are actually certified. The Online Effort Certification system is a web-based application that is integrated with and can be accessed from the Self-Service portal in MyUT.

Grants Accounting and the University's IT department have partnered to provide a *resource for tracking and reporting* Effort Report completion thru **Effort Certification Summary Reporting in Argos**. This Argos report is a tool that provides summary information on the report states (*Changes Saved; Changes Submitted; Locked; or Unlocked*) and report statuses (*Awaiting Certification; Awaiting Refresh; Certified; or Completed*) of effort reports and should be very instrumental in tracking and accounting for what effort reports are completed or are still awaiting action by either the Certifier or the PI.

## How To Access Argos Reporting

You may access Argos Reporting by going to the link: <https://myreports.utoledo.edu> .

Select the folder for "Effort Certification" and the report titled: "Effort Certification Summary."

We have also provided a direct link the Effort Certification Summary report from the Grants Accounting website from to locations:

**Forms and Directions** (Link on Left Side Panel Menu on Grants Accounting Pages) OR from the **"Summary Reports"** (Link on the Online Effort Certification Page).

# GRANTS ACCOUNTING

CONTROLLER OFFICE   ACCOUNTS PAYABLE   ACCOUNTING AND REPORTING   PAYROLL

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## RESOURCES

[myUT Web Portal](#)

[UT Webmail](#)

[Administrative Offices](#)

[Campus Directory](#)

## CONTACT US

### Main Campus

Research & Technology Complex 1,  
2nd Floor  
Mall Stop 218  
Phone: 419.530.1885  
Fax: 419.530.8766  
webmaster@utoledo.edu

## WELCOME TO GRANTS ACCOUNTING (POST-AWARD)

### HERE IS WHAT'S NEW IN GRANTS ACCOUNTING

[New Effort Reporting Period](#)

[New FY18 Fringe Rates](#)

[Grants Accounting Has Moved](#)

[New Award Notice Template](#)

[Grants Accounting Memos](#)



Grants Accounting at the University of Toledo is responsible for post-award grant administration and accounting functions. As a unit of the Controller's Office, Grants Accounting oversees the accounting and financial management of grants and sponsored programs for the University. This includes ensuring compliance with the rules and regulations of funding agencies, preparation and submission of related financial reports and invoices. Grants Accounting serves as a resource for accurate and complete information on post award administrative and financial support to principal investigators, project directors and sponsors. The Grants Accounting office

is a service-oriented team dedicated to the University's research and academic missions.

[FAQ](#)

[Effort Reporting](#)

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From "Forms and Directions" link:

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- Update Notice
- Frequently Asked Questions

**GRANTS ACCOUNTING FORMS**

- **Web Report Library**
- **Argos Reporting**

**INDEPENDENT CONTRACTORS**

- Procedure for Contracting with Independent Contractors (Including Consultants)
- Independent Contractor - Form A (Submit to HR-Employment)

**RSP109 (Departmental Request to Open a Restricted Account)**

- Complete and submit signed original to the Office of Research and Sponsored Programs.

**FEDERAL GRANTS RESOURCE**

- Dept of Commerce
- Dept of Defense
- Dept of Education
- Dept of Energy
- Dept of Transportation
- HHS
- HRSA
- NASA
- NIH
- NSF

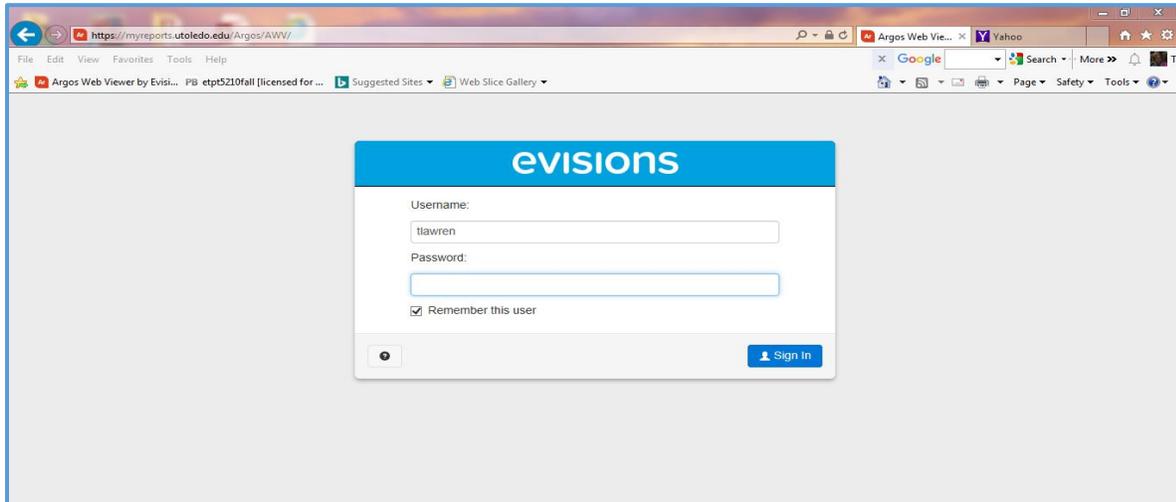
OR From "Effort Reporting" link (scroll down the page):

USEFUL EFFORT REPORTING LINKS
<a href="#">Effort Reporting FAQ</a>
<a href="#">Effort Reporting Quick Notes</a>
<a href="#">Effort Certification Training Manual</a>
<a href="#">Summary Reports on Effort Certification</a>
<a href="#">Request to Move Expenditures Over 90 Days or to Re-Open Certified Effort Report</a>

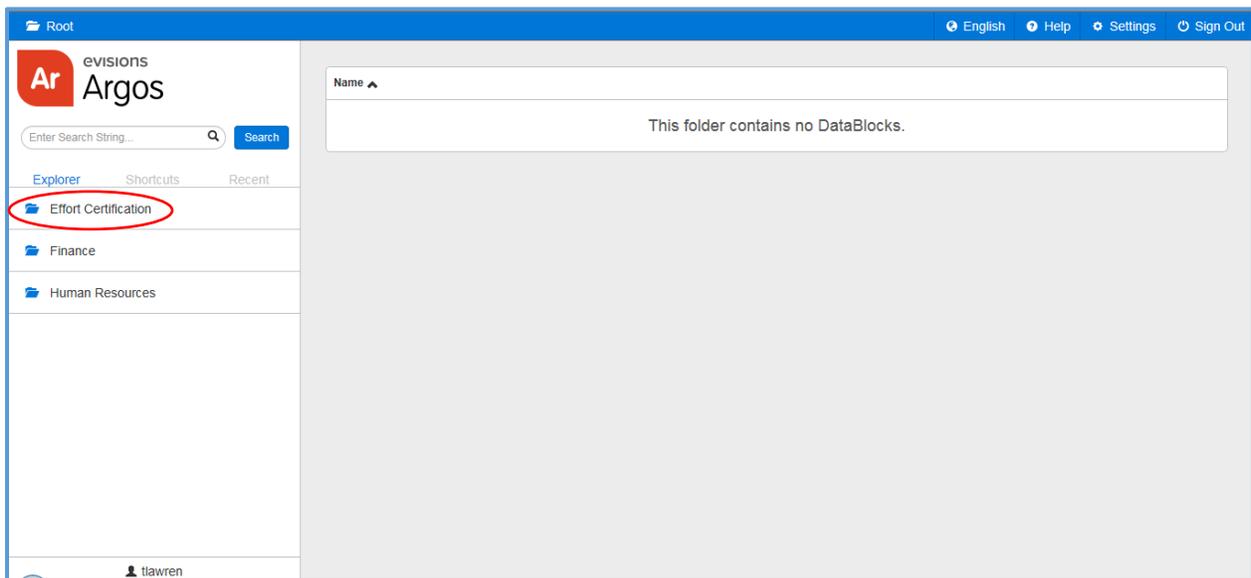
# How To Sign In To Argos Reporting

The Sign-In Screen for Argos Reporting:

*Use your UTAD credentials to sign into Argos.*



# Choosing Effort Certification Report Summary



Root > Effort Certification English Help Settings Sign Out

**Ar** evisions  
**Argos**

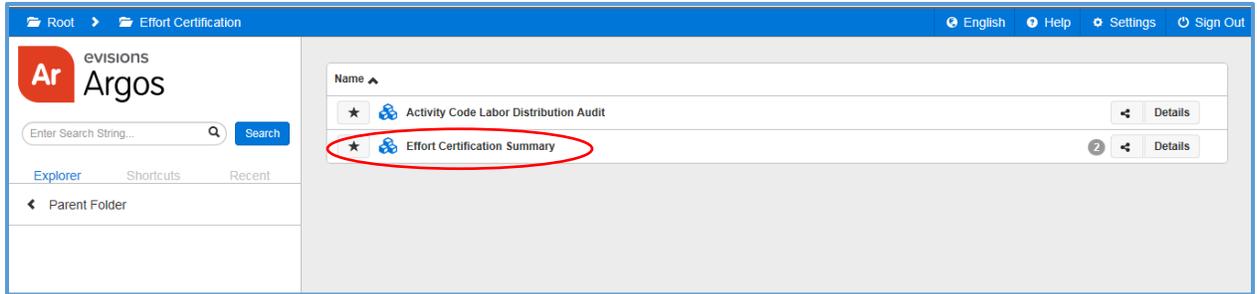
Enter Search String... Search

Explorer Shortcuts Recent

Parent Folder

Name ▲

★	Activity Code Labor Distribution Audit	Details
★	Effort Certification Summary	2 Details



## Choosing Effort Certification Summary Report Parameters

- 1) For each parameter choose either '**Select All**' or and **click on the specific selections required** while holding down the 'Ctrl' key to choose multiple selections in a group.
  - a. For specific selections make sure that '**Select All**' is **not checked**;
  - b. If you know a single selection you want you may optionally type it in the parameter box.

The screenshot displays the 'Effort Certification Summary' dashboard. At the top, there is a navigation bar with 'Root', 'Effort Certification', and 'Effort Certification Summary - Dashboard'. Below this is a header with the University of Toledo logo and the title 'Effort Certification Summary'. The main area contains several selection panels:

- Select Effort Period(s):** A list of semesters from 2017-4Q to 2015-4Q. '2017-4Q' is selected.
- Select Grant(s):** A table with columns 'Grant' and 'Grant Title'. 'All Grants Sel' and 'All Grants Selected' are selected.
- Select Fund(s):** A table with columns 'Fund' and 'Fund Title'. 'All Funds Sel' and 'All Funds Selected' are selected.
- Select Org(s):** A table with columns 'Organization' and 'Organization Title'. 'All Orgs Select' and 'All Orgs Selected' are selected.
- Select Activities:** A table with columns 'Activity' and 'Activity Title'. 'All Activities' and 'All Activities Selected' are selected.
- Select Certifier(s):** A table with columns 'Rocket ID' and 'Certifier Name'. 'All Certifiers S' and 'All Certifiers Selected' are selected.
- Select Pre-Reviewer(s):** A table with columns 'Rocket ID' and 'Pre Reviewer Name'. 'All Pre-Review' and 'All Pre-Reviewers Selected' are selected.
- Select Post-Reviewer(s):** A table with columns 'Rocket ID' and 'Post Reviewer Name'. 'All Post-Review' and 'All Post-Reviewers Selected' are selected.
- Select Report Status:** A table with columns 'Report Status'. 'All Status Selected' is selected.
- Select Report State(s):** A table with columns 'Report State'. 'All States Selected' is selected.

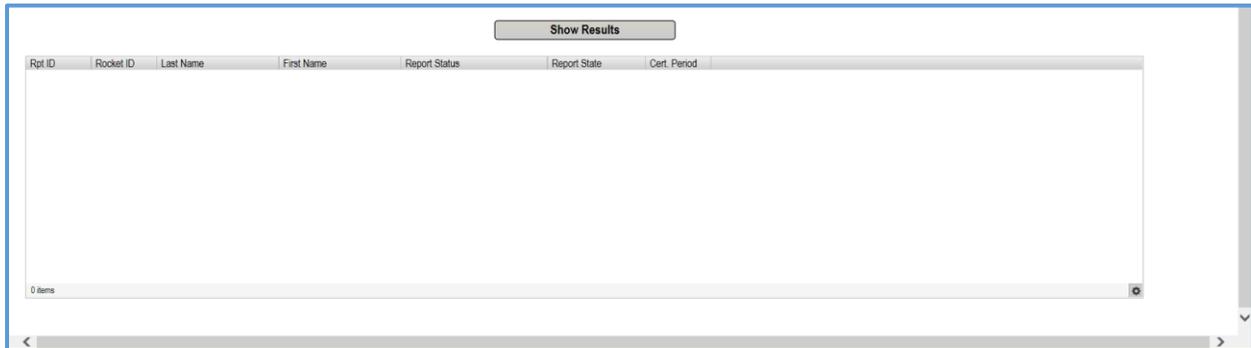
Each panel includes a 'Select All' checkbox and an 'Enter' field. A 'Show Results' button is located at the bottom center.

## Understanding Report Parameters

- Effort Period
  - The **Effort Period** represents the Year & Quarter of the effort evaluation period and it is the actual time period in which the work was done.
- Grant Title
  - The **Grant Title** is the title of the sponsored project or award
- Fund
  - The **Fund** is represents the index or accounting entity.
- Organization
  - **Organization** represents the departmental/college/budgetary subdivision.
- Activity
  - **Activity** is another element in the accounting FOAPAL string and is used in Effort Report to represent Cost Share activity contributions. It should always begin with 'G' followed by the award number and ending in 'M' (Mandatory Cost Share) or 'C' (Voluntary Committed).
- Certifier Name
  - The **Certifier** is the individual who performed the work effort.
- Pre-Reviewer(s)
  - **Pre\_Reviewers** often represent an administrative function on the sponsored project and could be an Award Coordinator, a Budget Manager, or the Grant Analyst on the award.
- Post-Reviewer(s)
  - A **Post-Reviewer** is the PI on the sponsored project. If an individual has multiple award assignments they may have more the one PI on the reports who needs to perform a post-review.
- Report Status
  - *Awaiting Certification*
  - *Awaiting Refresh*
  - *Certified*
  - *Completed*
- Report State
  - *Changes Saved*
  - *Changes Submitted*
  - *Unlocked*
  - *Locked*

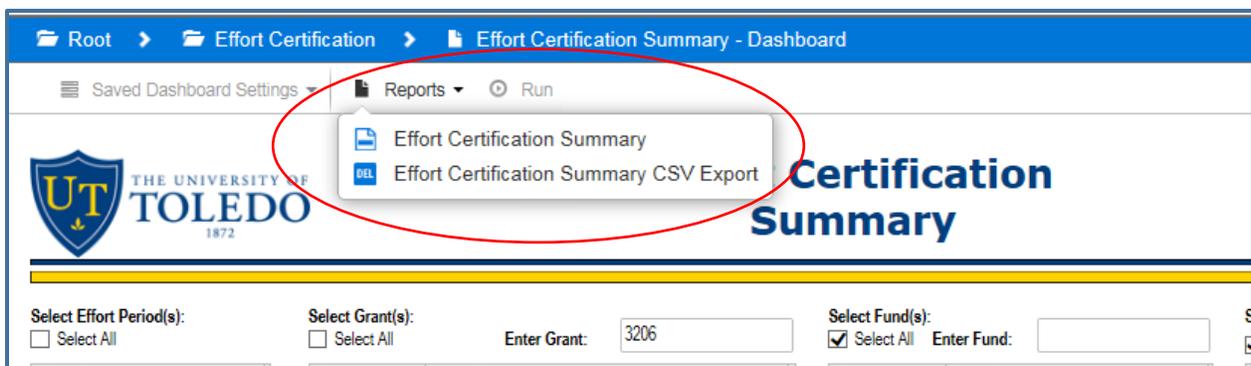
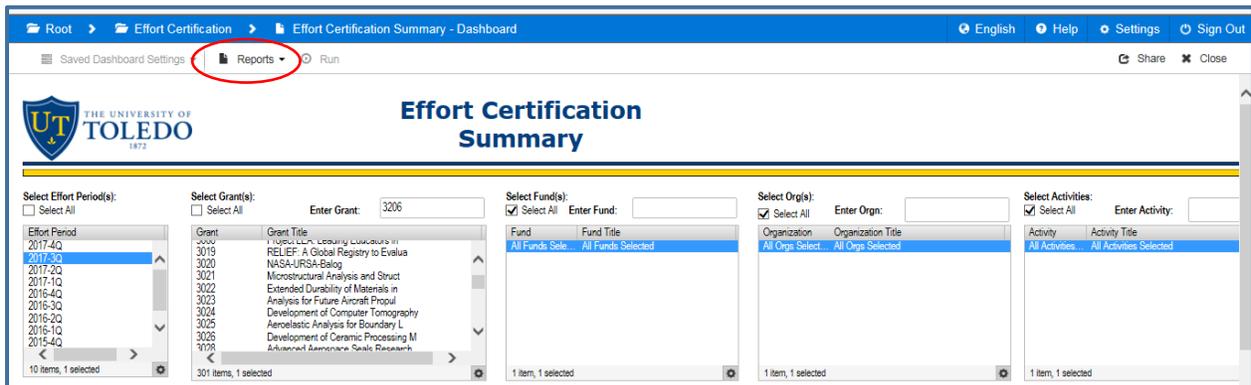
## Seeing Preliminary Results List

- 1) Click the “**Show Results**” button right below the parameter selection area to a preliminary results list.



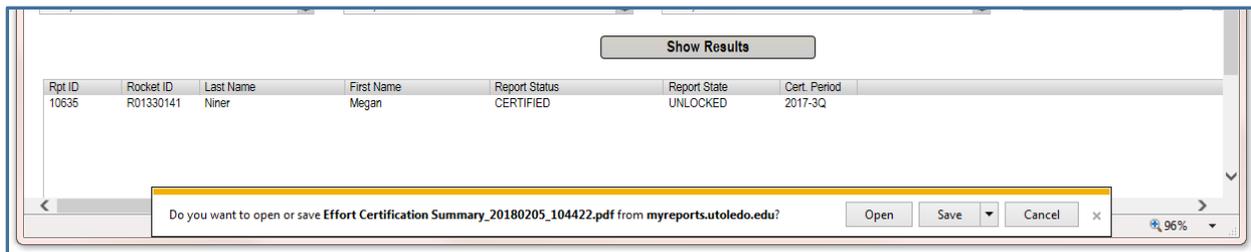
## Running & Printing the Report

Click on the 'Reports' pull-down menu for your report options.



Click on 'Effort Certification Summary' for a PDF document or on 'Effort Certification Summary CSV Export' for a CSV file that can be used in Excel.

The PDF dialogue box:



The CSV dialogue box:

