eCertification:
Lessons Learned and
Enhancements

OSR & SeRA Seminar Series

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Agenda

- eCert Successes
- eCert Features
- Lessons Learned
- Enhancements
- Questions and Comments
Successes

Successful rollout to campus

- Overseer go live – December 12, 2017
- Research Administrator go live - January 22 - February 16, 2018
- Principal Investigator go live - February 26 - March 23, 2018
Successes

- 8043 PTAs
  - 6888 required certification
  - 1155 certification not required
- 100% Reviewed by 330 Research Administrators
  \[\text{THANK YOU!}\]

- 1668 Certifiers
- 99.17% Certified prior to the deadline date
  \[\text{THANK YOU!}\]
Successes

Appears when there is a change in the Research Administrator. You can tell if there was an update in ePTA.
eCert Features – Make eCert work for YOU!

- Primary Task Manager Assignment – For Overseers
- Monthly and/or mid-quarter review using Quarter to Date
- Journal initiation from within eCert
- Drill into PO and Invoice details
eCert Demonstration

- Primary Task Manager Assignment – For Overseers
- Quarter to Date – For all eCert users
eCert Features

- Initiate non-salary journals
  - Reduces data entry - Saves time
  - Ensures data fidelity – Virtually eliminates keystroke errors
  - Can split expenses by $ or %
  - Journal status can be monitored within eCert
Feature - Journal Preparation & Status

- Easily view the status of any journals initiated within eCert
eCert Features

- Drill into PO and Invoice Details
- Allows for efficient deep dives

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eCert Features

- Drill into PO and Invoice Details
Lessons Learned

- Additional opportunities for system enhancements
- Start Early - Quarter to Date Reviews
- Start Early - For PIs leaving or that have left Stanford
- New Resource - Faculty Leave/Sabbatical  FAQs
eCert Enhancements

- Coming Soon – Reporting
- Your Voice Matters! - Continued feedback from users is critical for system enhancements
eCert Support and Resources

Support:
- Submit a Help Ticket

Resources:
- DoResearch
- Faculty Leave/Sabbatical FAQs
Questions?
Suggestions?
We’re All In This Together!

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OSR & SeRA Seminar Series Schedule

Attend seminars
Virtually with Zoom <- video conferencing link to join each seminar. Setup Zoom in advance to attend seminars virtually. Click for more info.