

Grant Quarterly Time & Effort Forms: Approval Process

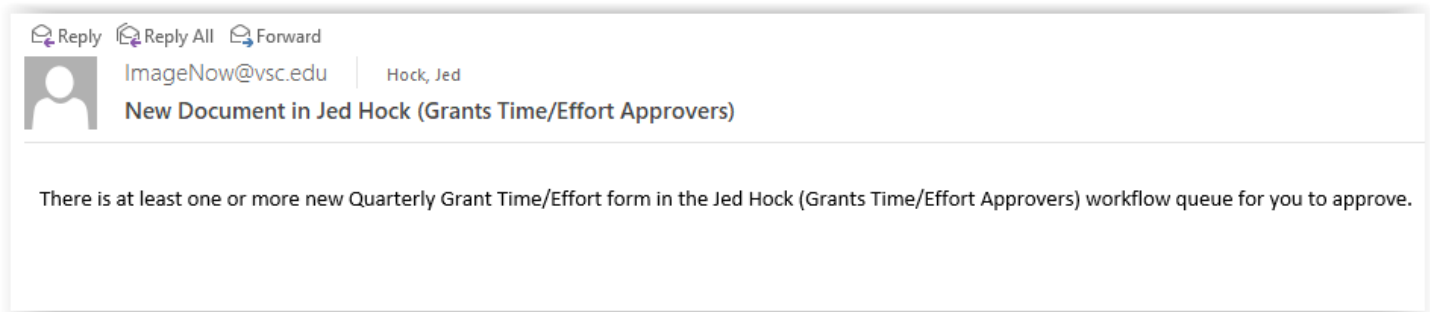
The instructions here are for using either the web version of Perceptive Experience (pages 1-5) or the desktop client for Perceptive Content (pages 6-8), depending on which version you use.

NOTE: Most approvers will use Perceptive Experience. If you are a person who frequently uses ImageNow/Perceptive Content for other work-related duties, you can use the desktop client to approve the time and effort form, or you also can use Perceptive Experience. For those who do not frequently use ImageNow/Perceptive Content for work-related duties, please follow the instructions for Perceptive Experience only.

E-mail Notification

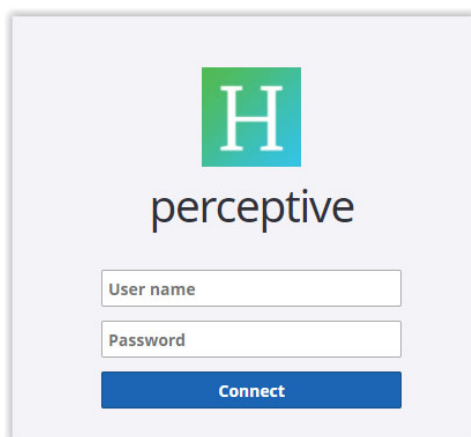
The forms should be completed quarterly by your employees. You will receive an alert to your email when you have a document to approve. This is true for all approvers and is not related to what method you use to approve documents.

The email you receive will look like this:

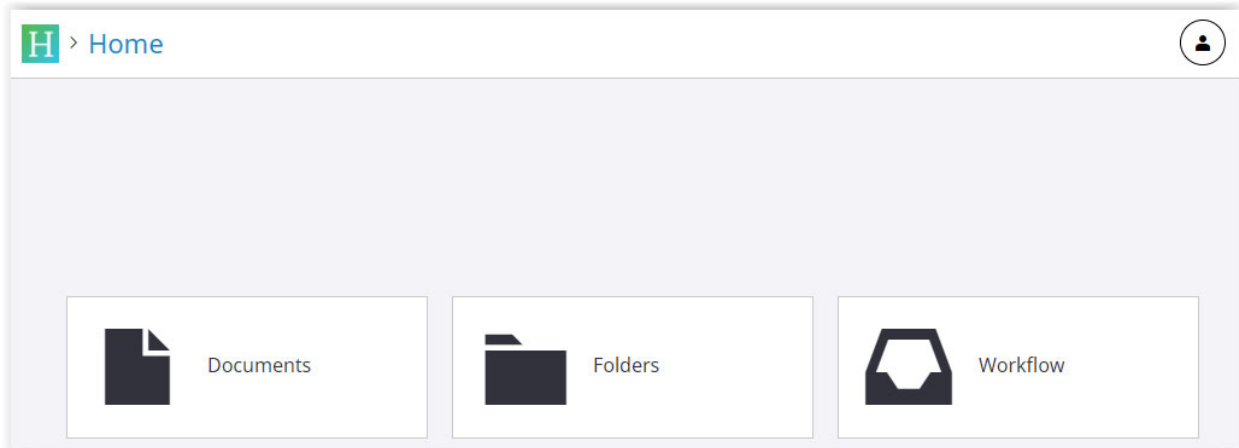


Approving Grants Quarterly Time/Effort Forms in Perceptive Experience (web)

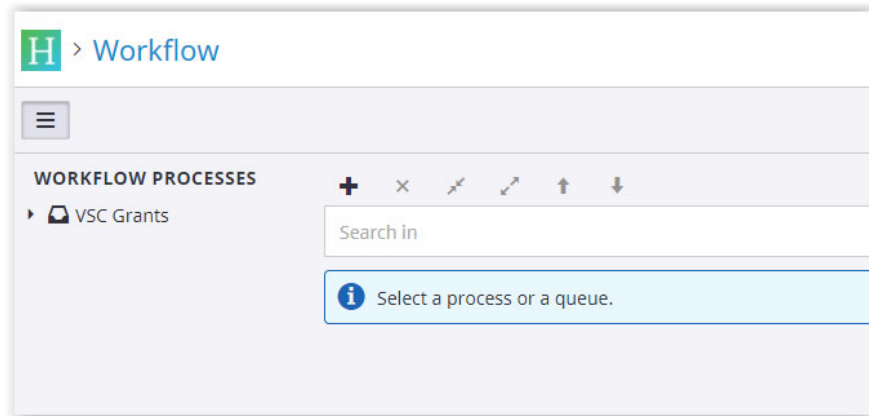
Go to <https://perceptive.vsc.edu:8443/experience> and sign in with your credentials.

A login interface for Perceptive Experience. It features a logo consisting of a green square with a white letter 'H' inside, positioned above the word 'perceptive' in a lowercase, sans-serif font. Below the logo are two input fields: the first is labeled 'User name' and the second is labeled 'Password'. At the bottom of the form is a blue button with the text 'Connect' in white.

After signing in, you should see a menu with a few icons like this (yours may not be identical):

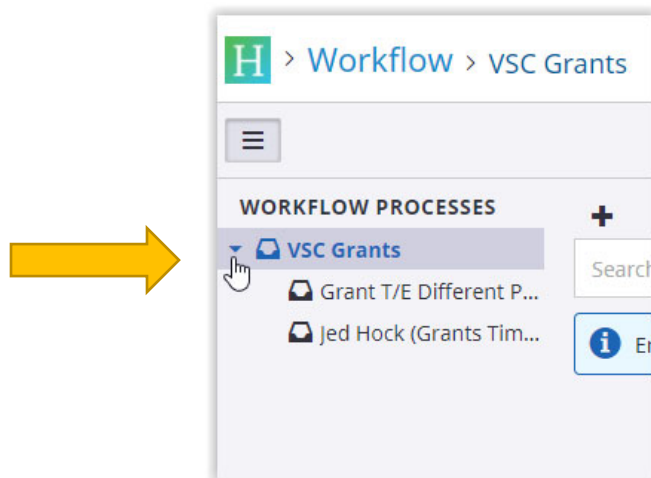


Click on “Workflow,” which will take you to:

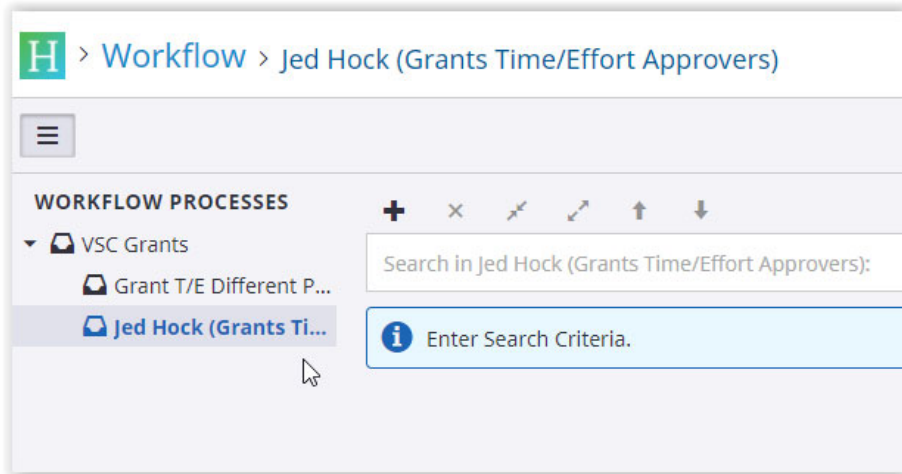


From this page you can access all the workflow processes you are part of as related to your work-related duties. Some people may see multiple workflows here while others may only see “VSC Grants.”

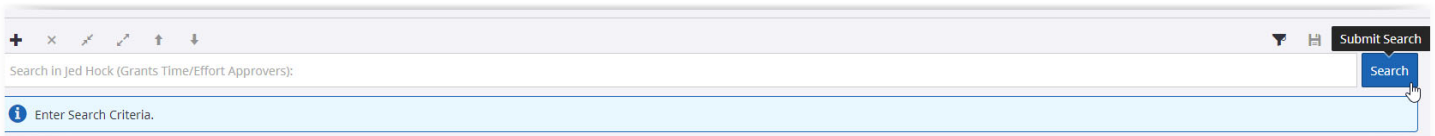
IMPORTANT! You must click on the triangle, or you will not see forms in your queue that are pending your approval!



You should see a “VSC Grants” workflow with a queue for “YourName (Grants Time/Effort Approvers).” Click on that workflow queue. You should see that queue then highlighted and the path across the top change to reflect what workflow queue you are viewing:



Mouse over to the “Search” button, which is located alongside the text field that says, “Search in YourName (Grants Time/Effort Approvers)”, and click “Search”:



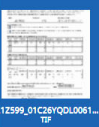
This should return then whatever documents are in your Grants Time/Effort Approvers workflow queue:

The screenshot shows a table with the following columns: 'Time In ...', 'Ite...', 'Stat...', 'Type', 'Name', 'Drawer', 'F...', 'Fiel...', and 'Field3'. The first row of data is highlighted in light blue and contains the following values: '20 hours 5...', a document icon, 'Idle', 'Grant Time...', '321Z599_0...', 'Grants', '1...', 'July-S...', and 'Jed Hock'. A mouse cursor is hovering over the 'Grants' cell.


<input type="checkbox"/>	Time In ...	Ite...	Stat...	Type	Name	Drawer	F...	Fiel...	Field3
<input type="checkbox"/>	20 hours 5...		Idle	Grant Time...	321Z599_0...	Grants	1...	July-S...	Jed Hock

Click to open the document in your workflow queue that needs approval:

Workflow > Jed Hock (Grants Time/Effort Approvers) \321Z599_01C26YQDL00619E



321Z599_01C26YQDL0061...
TIP


QUARTERLY TIME AND EFFORT CERTIFICATION
For grant-funded VTC salaried employees

Federal regulations require that salaries charged to federal grants must be based on records that accurately reflect the work performed. These records must be: 1) supported by a system of internal control which provides reasonable assurance that the charges are accurate, allowable, and properly allocated; 2) be incorporated into an organization's official records; and 3) reasonably reflect the total activity for which the employee is receiving salaried compensation. (2 CFR 200.439)

Name	Institution	Reporting Period
Jed Hock	VTC	July-Sept 2021 (FY 2022, Quarter 1)

Documentation Source:
 The percentages that I entered on this form align with my allocation in the accounting records.
 I had a noticeably different percentage of effort than what was allocated. The percentages entered on the form are more accurate representation of my effort.

Grant Effort This Quarter: (Dates indicate pay period ending dates)

Entity Code	Activity Code	07/09/21	07/23/21	08/06/21	08/20/21	09/03/21	09/17/21	NO TIME REPORTED
052	12345	50 %	50 %	50 %	50 %	50 %	50 %	%
052		%	%	%	%	%	%	%
052		%	%	%	%	%	%	%
052		%	%	%	%	%	%	%

Institutional Effort This Quarter:

Entity Code	Activity Code	07/09/21	07/23/21	08/06/21	08/20/21	09/03/21	09/17/21	NO TIME REPORTED
051		%	%	%	%	%	%	%
051		%	%	%	%	%	%	%

Matching Effort This Quarter:

Entity Code	Activity Code	07/09/21	07/23/21	08/06/21	08/20/21	09/03/21	09/17/21	NO TIME REPORTED
051	98765	50 %	50 %	50 %	50 %	50 %	50 %	%
051		%	%	%	%	%	%	%

I certify that the effort above reasonably reflects the work performed during this time period.
 Employee's Signature: **Jed Hock** Date: **09/09/2021**

SUPERVISOR APPROVAL
 I certify that I have first-hand knowledge of the compensated activities for the above listed individual and I confirm that the effort indicated above reasonably reflects the work performed in the designated period.
 Supervisor's Signature: **Ana Gaillat** Date: _____

DOCUMENT PROPERTIES

NAME
321Z599_01C26YQDL00619E

DRAWER
Grants

FIELD1
1004665

FIELD2
July-Sept 2021 (FY 2022, Quarter 1)

FIELD3
jed Hock

FIELD4
Ana Gaillat

FIELD5
516

TYPE
Grant Time/Effort

CUSTOM PROPERTIES

INSTITUTION
VTC

GRANTS TIME/EFFORT VERIFICATION
Normal Percentage

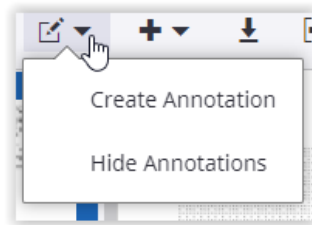
GRANTS MATCHING EFFORT
YES

NOTES

You are now viewing your employee's Quarterly Grant Time/Effort form submission. Please verify the information provided by your employee. Place your stamp/annotation over the date line next to your printed name once approved. The stamp/annotate button is on the toolbar located under the Workflow breadcrumb path:



After clicking the button, you will be presented with a choice:



Click "Create Annotation" which will then change your cursor to a box when you are mousing over the document.

Place your stamp/annotation over the date line next to your printed name once approved by clicking. You need to then change the Annotation type to "Text Stamp."

Then for Annotation Template you should have access to one named "*VSC* Grants Time/Effort Approved" to select. (It might also default to that.)

I certify that the effort above reasonably reflects the work performed during this time period.
Employee's Signature: Jed Hock Date: 09/09/2021

SUPERVISOR APPROVAL

I certify that I have first-hand knowledge of the compensated activities for the above listed individual and I confirm that the effort indicated above reasonably reflects the work performed in the designated period.
Supervisor's Signature: Ana Gaillat Date: _____

Annotation Type: Text Stamp
Annotation Template: *VSC* Grants Time/Effort Approved
Buttons: Cancel, Add

Click "Add" and the stamp should be placed. You can then reposition it to be on the date line if needed:

I certify that the effort above reasonably reflects the work performed during this time period.
Employee's Signature: Jed Hock Date: 09/09/2021

SUPERVISOR APPROVAL

I certify that I have first-hand knowledge of the compensated activities for the above listed individual and I confirm that the effort indicated above reasonably reflects the work performed in the designated period.
Supervisor's Signature: Ana Gaillat Date: _____

Stamp: Grants Time/Effort Approved
Jed Hock
09/10/2021

Once you have stamped/annotated the form with the "*VSC* Grants Time/Effort Approved" stamp you should route the document forward to complete the process. To "Route Forward" you need to click this button:

H > Workflow > Jed Hock (Grants Time/Effort Approvers) \ 321Z599_01

Buttons: Back, Save, Edit, Print, Stop, Copy, Paste, Route Forward

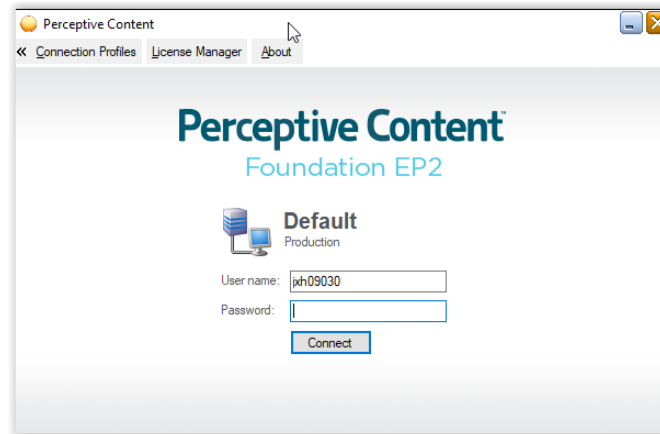
051 %

Once you click the “Route Forward” button, the form will move to the next step in the process. You will then be returned to your queue, and you should click “Search” again to see if you have any more documents to approve. If there are no new documents, then nothing will be returned from your Search.

The process is now complete for this quarter.

Approving Grants Quarterly Time/Effort Forms in Perceptive Content (desktop)

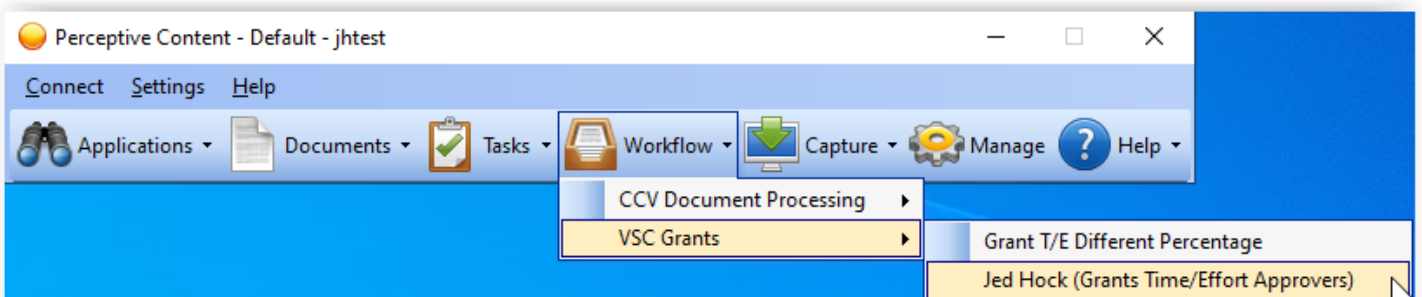
Open and run the desktop client and provide your login credentials:



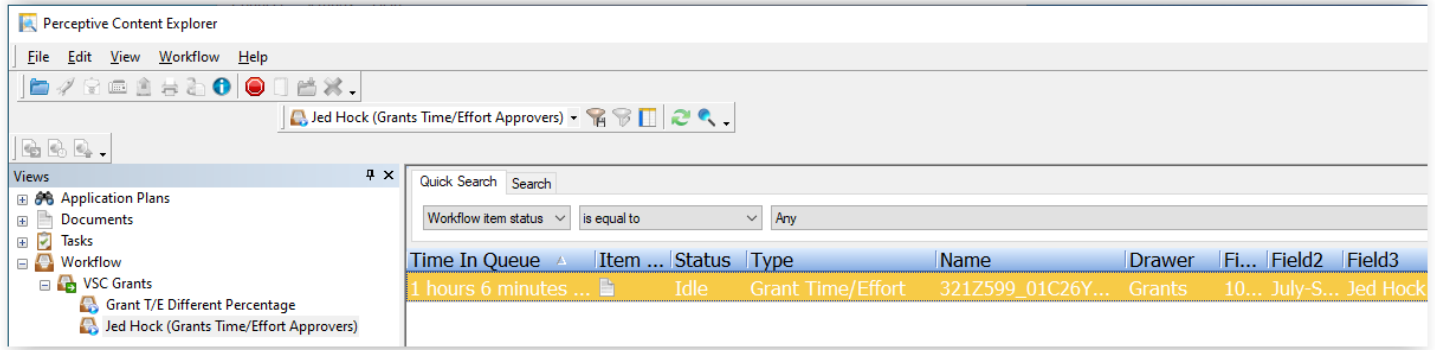
After logging in, you should have a Perceptive Content toolbar similar to the image below. It’s possible you may not have all the same buttons but that would depend upon your work-related duties within Perceptive.



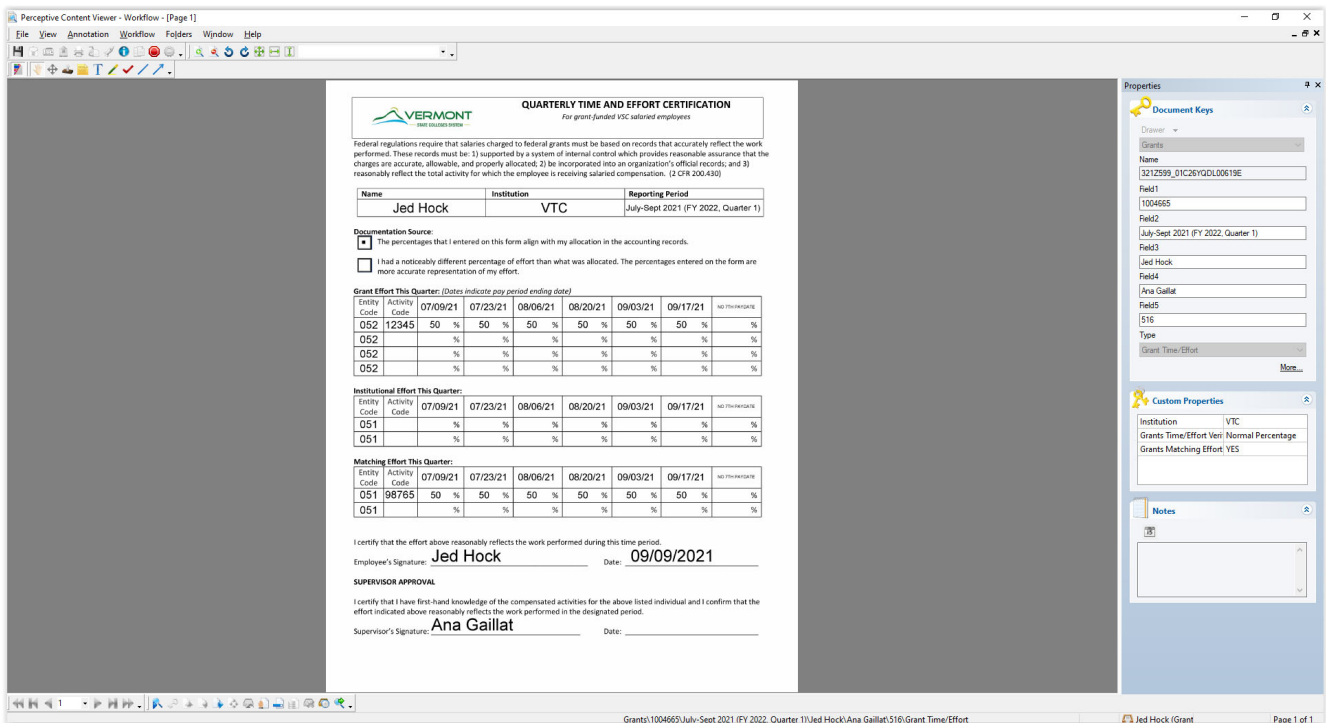
Mouse over to the “Workflow” button and click the drop-down button to see the list of workflow queues you have access to. You should see a “VSC Grants” workflow with a queue for “YourName (Grants Time/Effort Approvers)”:



Clicking on that workflow queue will bring you to your Grants Time/Effort Approvers queue where you should then see one or more new document(s) to approve:



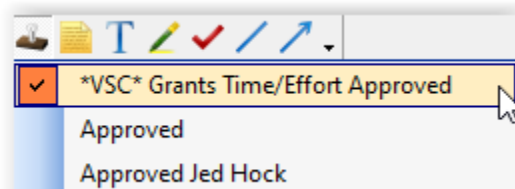
From here you need to double click on the document you want to open. It will open in the Document Viewer:



You are now viewing your employee's Quarterly Grant Time/Effort form submission. Please verify the information provided by your employee. Place your stamp/annotation over the date line next to your printed name once approved. The stamp/annotate button is on one of the upper left toolbars and looks like this:



To place a stamp/annotation, right click the button and a drop-down menu will show what stamps/annotations are available. You should have access to one named “*VSC* Grants Time/Effort Approved” for approving these forms.



Once the button is clicked, you mouse over the document to the location of where you want to place your stamp and then click again:

I certify that the effort above reasonably reflects the work performed during this time period.
Employee's Signature: Jed Hock Date: 08/24/2021

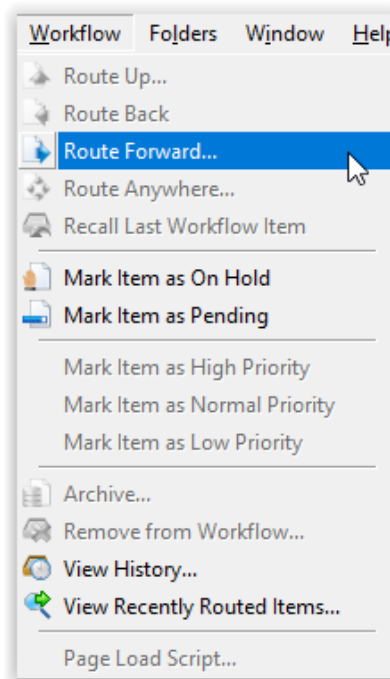
SUPERVISOR APPROVAL

I certify that I have first-hand knowledge of the compensated activities for the above listed individual and I confirm that the effort indicated above reasonably reflects the work performed in the designated period.
Supervisor's Signature: Rebecca Millard Date: 08/27/2021

Grants Time/Effort Approved
Jedediah Hock
08/27/2021

After you have stamped/annotated the form with the “*VSC* Grants Time/Effort Approved” stamp you should route the document forward to complete the process. There are two methods to route the document forward.

Method 1: In the Document Viewer across the top menu bar, you will see “Workflow.” If you click there the Workflow menu will expand and you should then see “Route Forward”:



Method 2: Across the bottom there’s a menu that has a button specifically for Route Forward:



Once you click either of those “Route Forward” buttons the form will move to the next step in the process. If you have more than one document to approve, the system will open the next document waiting for approval in this queue. If there are no new documents, you will return to the workflow view that will show no documents in your queue.

The process is now complete for this quarter.