



Accessing Effort Reports Administrators



Accessing ERS

In this module you will learn that ERS creates special views for groups of users and you will see those views.

You will also learn how Department Administrators will access Effort Reports.

Accessing ERS

When users log on to ERS they will be taken to one of four screens or views depending on their personal authorizations and settings within the system. ERS creates special views for:

1. Self-Certifiers
2. Principal Investigators
3. Employees paid from federal projects but who are NOT Principal Investigators
4. Employees who are not paid from federal projects but who will be responsible for accessing, reviewing, or certifying Effort Reports for others.

Self-Certifiers

Users who are not authorized to certify reports for others, but who will be certifying their own effort reports, will be taken to a screen displaying a list titled “My Effort Reports”.

The screenshot displays the 'UNIVERSITY of CALIFORNIA Effort Reporting System' interface. At the top, the user is identified as 'User: Deb Nikkel (534334615) | Account Settings | Sign-Out'. The main section is titled 'EFFORT REPORT LIST' and includes a search bar with 'My Effort Reports' selected and 'Reporting Periods' set to 'All'. A red box highlights the header 'REPORT LIST FOR: My Effort Reports'. Below this is a table with one entry:

Period	For	Last Modified	Status
Winter 04/05 11/12 Academics	CLIRK,INDRAW (534334615)	02/03/2006 - v1.0	Open

At the bottom, it shows 'Display 20 reports per page' and 'displaying 1 to 1 (1 total)'. A footer note reads: 'copyright 2005 - 2006, The Regents of the University of California, All rights reserved.'

Self-Certifiers (cont'd)

From here they will be able to select their own Effort Reports:

- to view individual period reports
- to see when a report was last modified
- to view the status of reports for all periods
- and to review and certify their own Effort Reports.

The screenshot shows the 'UNIVERSITY of CALIFORNIA Effort Reporting System' interface. The user is identified as 'User: Deb Nikkel (534334615)'. The page title is 'EFFORT REPORT LIST'. There are search filters for 'Display Saved Search: My Effort Reports' and 'Reporting Periods: All'. A table lists reports, with one entry highlighted: 'Winter 04/05 11/12 Academics' for user 'CLIRK,INDRAW (534334615)', last modified '02/03/2006 - v1.0', and status 'Open'. The interface also includes options to 'Export List', 'Send List', and 'Print List', and a footer with copyright information.

Period	For	Last Modified	Status
Winter 04/05 11/12 Academics	CLIRK,INDRAW (534334615)	02/03/2006 - v1.0	Open

Principal Investigators

Principal Investigators will be taken to a screen that contains a Report List titled “My Projects”. The “My Projects” list is created by ERS based on information provided by other campus information systems indicating the Principal Investigator for each sponsored project.

UNIVERSITY of CALIFORNIA

Effort Reporting System User: GRAGYRU DONN (333520644) | [Account Settings](#) | [Sign-Out](#)

EFFORT REPORT LIST ?

Display Saved Search: My Projects Manage Searches... Create New...

Reporting Periods: All Select: Winter 04/05 11/12 Academics

REPORT LIST FOR: *MY PROJECTS* Export List Send List Print List

Period	For	Last Modified	Status
Winter 04/05 11/12 Academics	AEGORAN FARNINDAZ,IRINTZI (938610243)	02/03/2006 - v1.0	Open
Winter 04/05 11/12 Academics	CLIRK,INDRAW (534334615)	02/03/2006 - v1.0	Open
Winter 04/05 11/12 Academics	CYWGELL,BORTYN Y (733252545)	02/03/2006 - v1.0	Open
Winter 04/05 11/12 Academics	KOHN,THYMIS (134894609)	02/03/2006 - v1.0	Open
Winter 04/05 11/12 Academics	KRODUSZ,MIRGIRAT I (534356306)	02/03/2006 - v1.0	Open
Winter 04/05 11/12 Academics	MEGOAL,INTYNEY HYRICEY (638637770)	02/03/2006 - v1.0	Open
Winter 04/05 11/12 Academics	MILDYNIDY,RETI RIQOAL (138660204)	02/03/2006 - v1.0	Open
Winter 04/05 11/12 Academics	PARLMIN,DABYRIH G (034819561)	02/03/2006 - v1.0	Open
Winter 04/05 11/12 Academics	SCHOSTAR,MIRK I (533593588)	02/03/2006 - v1.0	Open
Winter 04/05 11/12 Academics	SON,DYNG (838615773)	02/03/2006 - v1.0	Open

Display 20 reports per page displaying 1 to 10 (10 total)

Principal Investigators (cont'd)

PI's are automatically authorized to access, view, and certify Effort Reports for anyone paid from projects for which they are designated as the Principal Investigator.

UNIVERSITY of CALIFORNIA

Effort Reporting System User: GRAGYRU DONN (333520644) | [Account Settings](#) | [Sign-Out](#)

EFFORT REPORT LIST ?

Display Saved Search: My Projects Manage Searches... Create New...

Reporting Periods: All Select: Winter 04/05 11/12 Academics

REPORT LIST FOR: *MY PROJECTS* Export List Send List Print List

Period	For	Last Modified	Status
Winter 04/05 11/12 Academics	AEGORAN FARNINDAZ,IRINTZI (938610243)	02/03/2006 - v1.0	Open
Winter 04/05 11/12 Academics	CLIRK,INDRAW (534334615)	02/03/2006 - v1.0	Open
Winter 04/05 11/12 Academics	CYWGELL,BORTYN Y (733252545)	02/03/2006 - v1.0	Open
Winter 04/05 11/12 Academics	KOHN,THYMIS (134894609)	02/03/2006 - v1.0	Open
Winter 04/05 11/12 Academics	KRODUSZ,MIRGIRAT I (534356306)	02/03/2006 - v1.0	Open
Winter 04/05 11/12 Academics	MEGOAL,INTYNEY HYRICEY (638637770)	02/03/2006 - v1.0	Open
Winter 04/05 11/12 Academics	MILDYNIDY,RETI RIQOAL (138660204)	02/03/2006 - v1.0	Open
Winter 04/05 11/12 Academics	PARLMIN,DABYRIH G (034819561)	02/03/2006 - v1.0	Open
Winter 04/05 11/12 Academics	SCHOSTAR,MIRK I (533593588)	02/03/2006 - v1.0	Open
Winter 04/05 11/12 Academics	SON,DYNG (838615773)	02/03/2006 - v1.0	Open

Display 20 reports per page displaying 1 to 10 (10 total)

Employees Who Are Paid from Federal Funds

Users who are not Principal Investigators but who are paid from federal projects will be taken to a screen containing a list of “My Effort Reports”. If they are authorized to view, review, or certify Effort Reports for others they will also have access to the Create Searches function, and will be able to define their own searches.

UNIVERSITY of CALIFORNIA
Effort Reporting System User: Deb Nikkel (534334615) | [Account Settings](#) | [Sign-Out](#)

EFFORT REPORT LIST

Display Saved Search: My Effort Reports Manage Searches... Create New...

Reporting Periods: All Select: Winter 04/05 11/12 Academics

REPORT LIST FOR: **My Effort Reports** Export List Send List Print List

Period	For	Last Modified	Status
Winter 04/05 11/12 Academics	CLIRK,INDRAW (534334615)	02/03/2006 - v1.0	Open

Display 20 reports per page displaying 1 to 1 (1 total)

copyright 2005 - 2006, The Regents of the University of California, All rights reserved.

Done

Employees Who Are Not Paid from Federal Funds

Departmental Administrators who are not paid from federal funds and therefore do not have an Effort Report for themselves, but who are authorized to certify for others, will be taken to a Create Searches screen containing various tabs and selection options. These selection options will allow the administrator to create searches to select the Effort Reports they wish to access.

UNIVERSITY of CALIFORNIA

Effort Reporting System User: Deb Nikkel (534334615) | [Account Settings](#) | [Sign-Out](#)

[Return to Manage Saved Searches](#)

EDIT SAVED SEARCH: <NEW SEARCH> ?

Display Reports for:

People Departments Projects Funds

FILTER PEOPLE BY:

- Name/Employee ID contains or equals
- Person's Home Department name or number contains or equals
- Person is Principal Investigator (PI)

[Update Filter](#)

FILTERED RESULTS LIST: [Select All](#)

Click one or more people to add them to the collection:

AADS, PIOLI JAIN (738621516) IMM OFC INFO RESOURCES & COMM (814000)	▶
AAVI, MARVE MERJIME (738583078) PATHOLOGY AND LAB MEDICINE (162500)	▶
ABAR, LASLEA M (130897554) MEDICINE-DEPT ADMINISTRATION (156500)	▶
ABARHIRT, NECYLA KORZAR (938652794) PSYCHOLOGY (087500)	▶
ABARLAU, THARASI L (638533299) FINANCE & INFORMATION MANAGEME (401500)	▶
ABARTYWSKE, TEMYTHU L. (338170229) SOCIAL_SCI COMPUTING (121000)	▶

SEARCH COLLECTION: [Remove All](#)

Click an item to remove it from the collection:

-

0 people in collection.

[SAVE...](#) [SAVE AS...](#) [VIEW...](#)

Default Views

All users except for Self-Certifiers may choose which list or view will appear each time they log on. This can be done by setting a default search. Setting defaults is explained in the Creating Searches module.

Accessing Effort Reports

From this screen, depending on your ERS Authorization, you may view, review, add comments and/or certify Effort Reports.

Talk to your departmental effort reporting administrator to determine what you are authorized to do and what information you can access.

Refer to the ERS Authorization module for more details.

The screenshot shows the 'UNIVERSITY of CALIFORNIA Effort Reporting System' interface. At the top, it displays the user 'User: Deb Nikkel (534334615)' with links for 'Account Settings' and 'Sign-Out'. Below this is the 'EFFORT REPORT LIST' section, which includes a 'Display Saved Search' dropdown set to 'My Effort Reports', buttons for 'Manage Searches...' and 'Create New...', and a 'Reporting Periods' section with radio buttons for 'All' and 'Select' (selected), and a dropdown menu for 'Winter 04/05 11/12 Academics'. The main table is titled 'REPORT LIST FOR: My Effort Reports' and includes buttons for 'Export List', 'Send List', and 'Print List'. The table has columns for 'Period', 'For', 'Last Modified', and 'Status'. A single row is visible with the following data: 'Winter 04/05 11/12 Academics' (with a printer icon), 'CLIRK,INDRAW (534334615)', '02/03/2006 - v1.0', and 'Open'. Below the table, there is a 'Display' dropdown set to '20' reports per page and a status indicator 'displaying 1 to 1 (1 total)'. At the bottom, a copyright notice reads 'copyright 2005 - 2006, The Regents of the University of California, All rights reserved.' and a 'Done' button is visible in the footer.

Period	For	Last Modified	Status
Winter 04/05 11/12 Academics	CLIRK,INDRAW (534334615)	02/03/2006 - v1.0	Open

Accessing Effort Reports

To access an individual Effort Report :

- Select the individual whose Effort Report you wish to view from the list.
- Click the **view** icon to view the Effort Report
- Click the **edit** icon if you intend to edit the Effort Report

The screenshot displays the 'UNIVERSITY of CALIFORNIA Effort Reporting System' interface. At the top, the user is identified as 'GRAGYRU DONN (333520644)' with links for 'Account Settings' and 'Sign-Out'. The main section is titled 'EFFORT REPORT LIST' and includes a search filter set to 'My Projects' and 'Reporting Periods' set to 'Winter 04/05 11/12 Academics'. Below this is a table of reports for 'My Projects' with columns for 'Period', 'For', 'Last Modified', and 'Status'. Each row includes a 'view' icon (two overlapping pages) and an 'edit' icon (pencil). At the bottom, it shows 'Display 20 reports per page' and 'displaying 1 to 10 (10 total)'.

Period	For	Last Modified	Status
Winter 04/05 11/12 Academics	AEGORAN FARNINDAZ ,IRINTZI (938610243)	02/06/2006 - v1.2	Open
Winter 04/05 11/12 Academics	CLIRK,INDRAW (534334615)	02/03/2006 - v1.0	Open
Winter 04/05 11/12 Academics	CYWGELL,BORTYN Y (733252545)	02/03/2006 - v1.0	Open
Winter 04/05 11/12 Academics	KOHN,THYMIS (134894609)	02/03/2006 - v1.0	Open
Winter 04/05 11/12 Academics	KRODUSZ,MIRGIRAT I (534356306)	02/03/2006 - v1.0	Open
Winter 04/05 11/12 Academics	MEGOAL,INTYNEY HYRICEY (638637770)	02/06/2006 - v2.0	Certified/AdjustReqd
Winter 04/05 11/12 Academics	MILDYNIDY,RETI RIQOAL (138660204)	02/03/2006 - v1.0	Open
Winter 04/05 11/12 Academics	PARLMIN,DABYRIH G (034819561)	02/03/2006 - v1.0	Open
Winter 04/05 11/12 Academics	SCHOSTAR,MIRK I (533593588)	02/03/2006 - v1.0	Open
Winter 04/05 11/12 Academics	SON,DYNG (838615773)	02/03/2006 - v1.0	Open

Accessing Effort Reports (cont'd)

Refer to The Effort Report module for a detailed explanation of the Effort Report.

Refer to Report Lists and Creating Searches for details on how to search ERS for specific effort report lists; and how to specify which report list is shown when you log-on to ERS.

Conclusion

In this module you learned about the different views users may see when logging on to ERS.

You also learned how Administrators access ERS.

