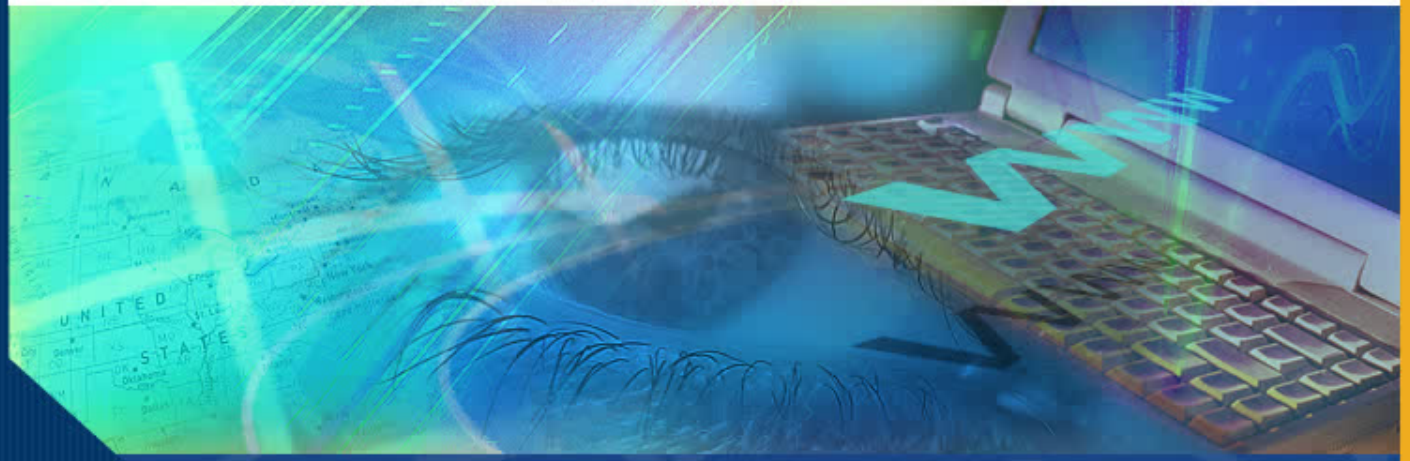


ERS Authorization

Introduction

Welcome to the ERS Authorization module. In this module you will learn about the requirements for authorizing use of the Effort Reporting System and how to set up those authorizations in the system.

ERS Authorized Functions

There are seven functions that control what activities a user is able to perform in ERS. Those functions are:

- View
- Review
- Certify
- Access Payroll Information
- Administer Security
- Department System Administrator
- ERS Coordinator

View Function

Users who have been assigned the **View** function can:

- Access ERS
- View Effort Reports before or after certification

Review Function

Users who have been assigned the **Review** function can:

- Access ERS
- View Reports before or after certification
- Edit Effort Reports (only before certification)
- Add comments

Certifier Function

Users who have been assigned the **Certifier** function can:

- Access ERS
- Review Effort Reports before and/or after certification
- Edit Effort Reports
- Add comments
- Certify Effort Reports for self and others

Access Payroll Information Function

Users who have been assigned the **Access Payroll** function can:

- Access payroll drill-down information on Effort Reports the user is authorized to see.

Coordinator Function

Users who have been assigned the **Coordinator** function will:

- Receive notifications and can:
  - Access ERS
  - Track completion of certification
  - Follow-up on incomplete or late Effort Reports
  - Perform selected system administration tasks

System Administrator Function

Users who have been assigned the **System Administrator** function can perform selected administrative tasks such as:

- Setting up list of users for whom Effort Report should be created even though they are not paid from federal funds.
- Designating which employees may not certify their own Effort Reports.

Administer Security Function

Users who have been assigned the **Administer Security** function can:

- Access ERS Administration module (only)
- Perform Security functions
  - View permissions, roles, users
  - Add permissions, roles, users
  - Remove permissions, roles, users

Administer Security Function, cont.

ERS provides a very flexible mechanism for granting system access to users. On the next few pages you will hear about functions, resources, permissions, and roles.

While the process may sound complicated at first it is actually quite easy. This set up of authorizations will be done primarily by one or two Security Administrators in each department.

Administer Security Function, cont.

The next few slides will describe how to select Functions and Resources to create Permissions and then how to bundle Permissions into Roles, and finally how to assign Users to Roles so that they can access ERS.

It is important to understand that a large part of these activities are part of the set up process for ERS. Once Roles are established they can easily be assigned to new Users. It will not be necessary to complete all of these steps each time a new User is given authorization.

ERS Resources

Users who are authorized to perform specific functions (e.g., view, review, certify, etc.) can do so only on Effort Reports they are authorized to access.

Access to Effort Reports is controlled through the designation of Resources. You could think of Resources as organizational areas of responsibility, e.g. is the user responsible for department A or department B. In ERS, Resources are differentiated by employee, account, fund, project and department.

Resource Types

There are six resource types you may use to specify what Effort Reports a user may access. They are:

- Employee ID
- Account department
- Fund department
- Full Accounting Unit
- Department Code
- Project ID

Why are Functions and Resources Important?

Functions and resources are the basic building blocks with which you set up authorizations.

Why? Because the first step in setting up authorizations is to create “permissions.” To create a permission, you must designate a **function** and a **resource**.

How to Set Up Authorizations on ERS

To set up authorizations on ERS:

- Define **permissions** by designating desired **function** (e.g. View, Review, Coordinator) and **resource type** (e.g. department code, FAU, Project ID) for each permission.
- Create a **role**.
- Select and bundle one or more permissions and assign those permissions to the role you previously created.
- Assign appropriate department personnel to ERS role.

Let's look at these steps in more detail.

What are Permissions?

Permissions are created to define functions that can be performed on groups of reports, e.g., “certify all reports for home department 814200.”

You define **permissions** by designating desired **function** and **resource types**.

Permission = function + resource

Remember: functions control activities--resources control access to specific Effort Reports.

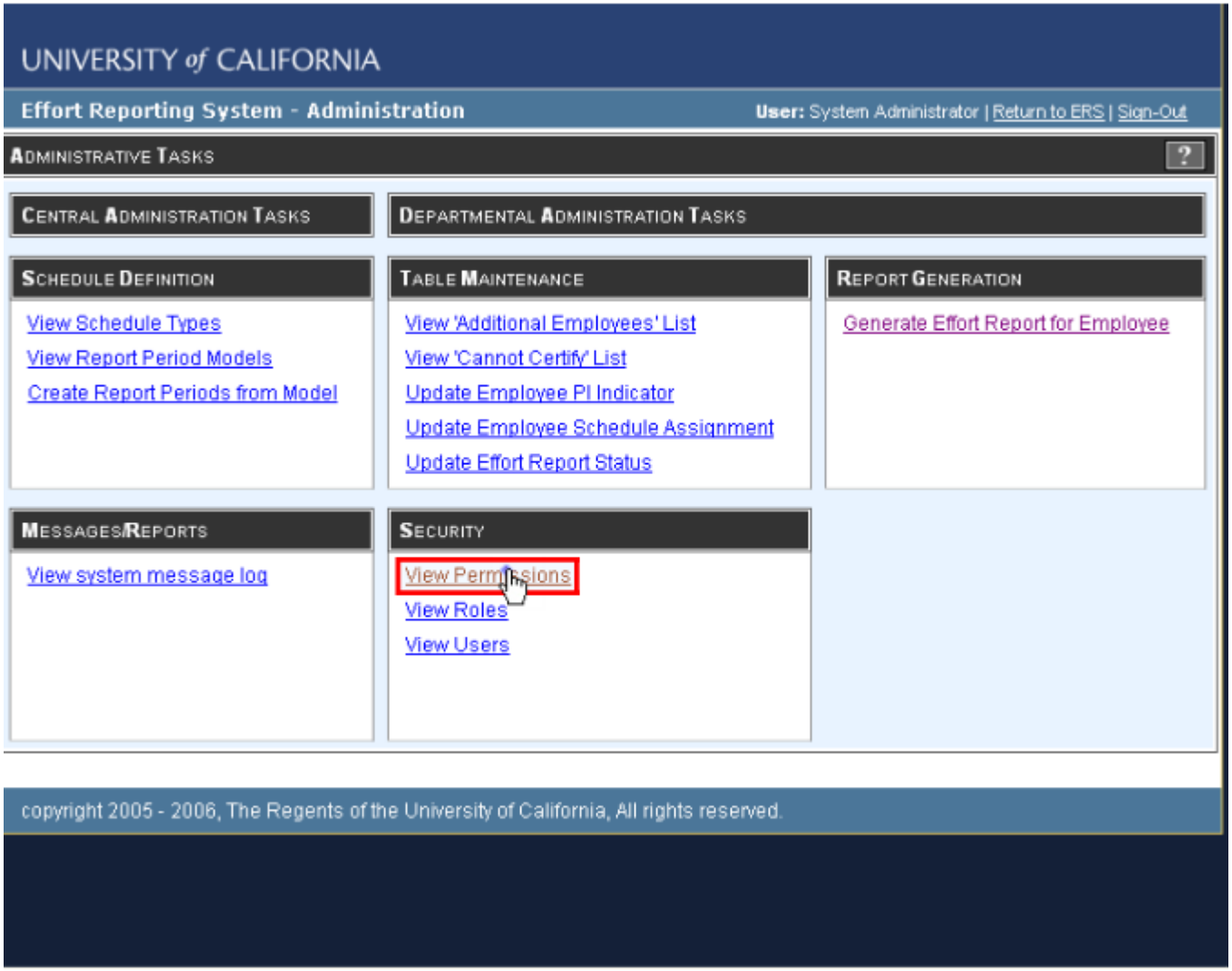
You must designate a function and a resource type for each permission you want to set up.

How to Define Permissions

- To define **permissions** access the Administration screen
- Under Security, click **View Permissions.**
- From the Permission List screen, click **Add Permission** button.
- Select desired functions and resources.
- Give permission a name.
- Save or (cancel).

How to Define Permissions

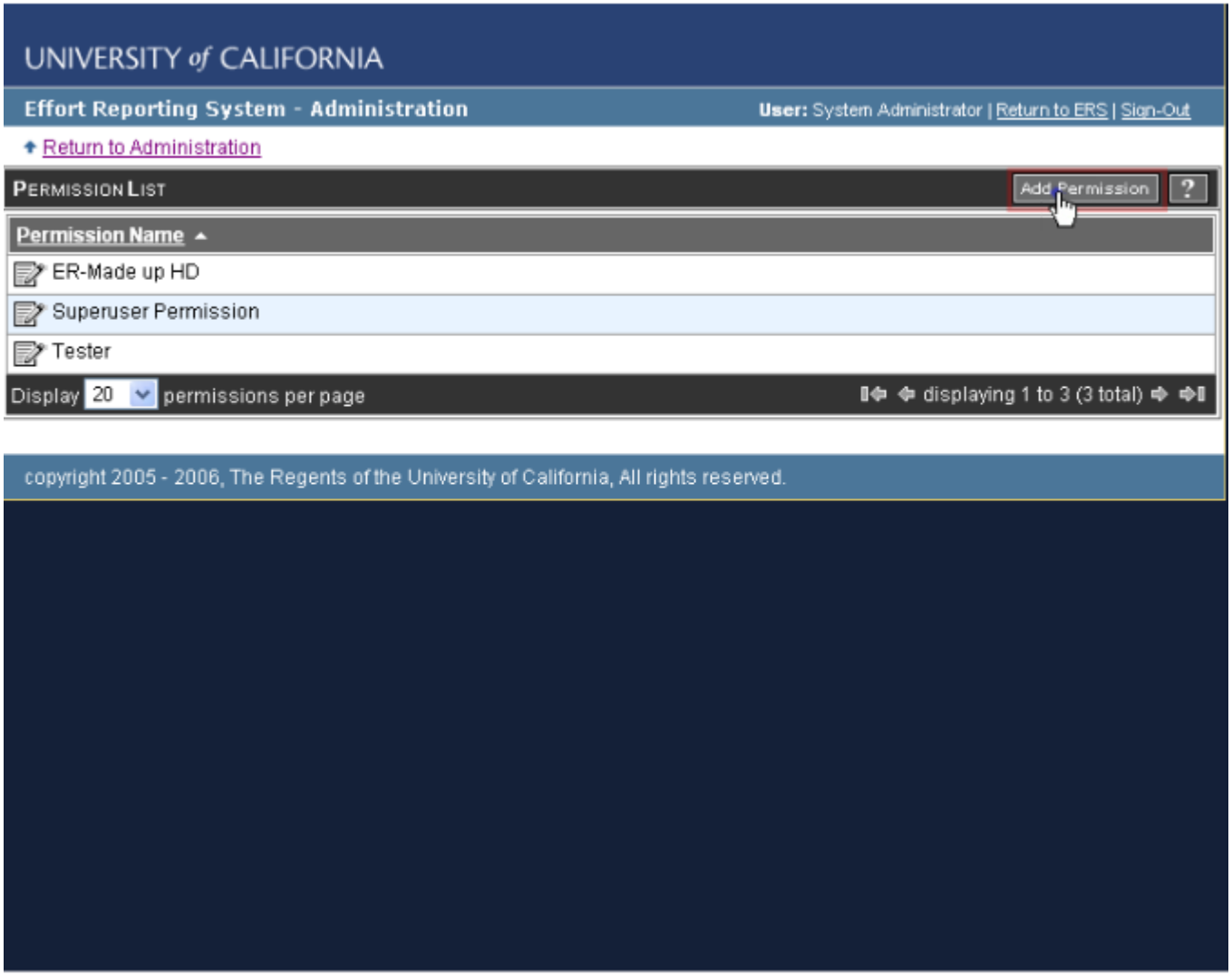
Click **View Permissions** from the **Administrative Tasks** screen.



How to Define Permissions

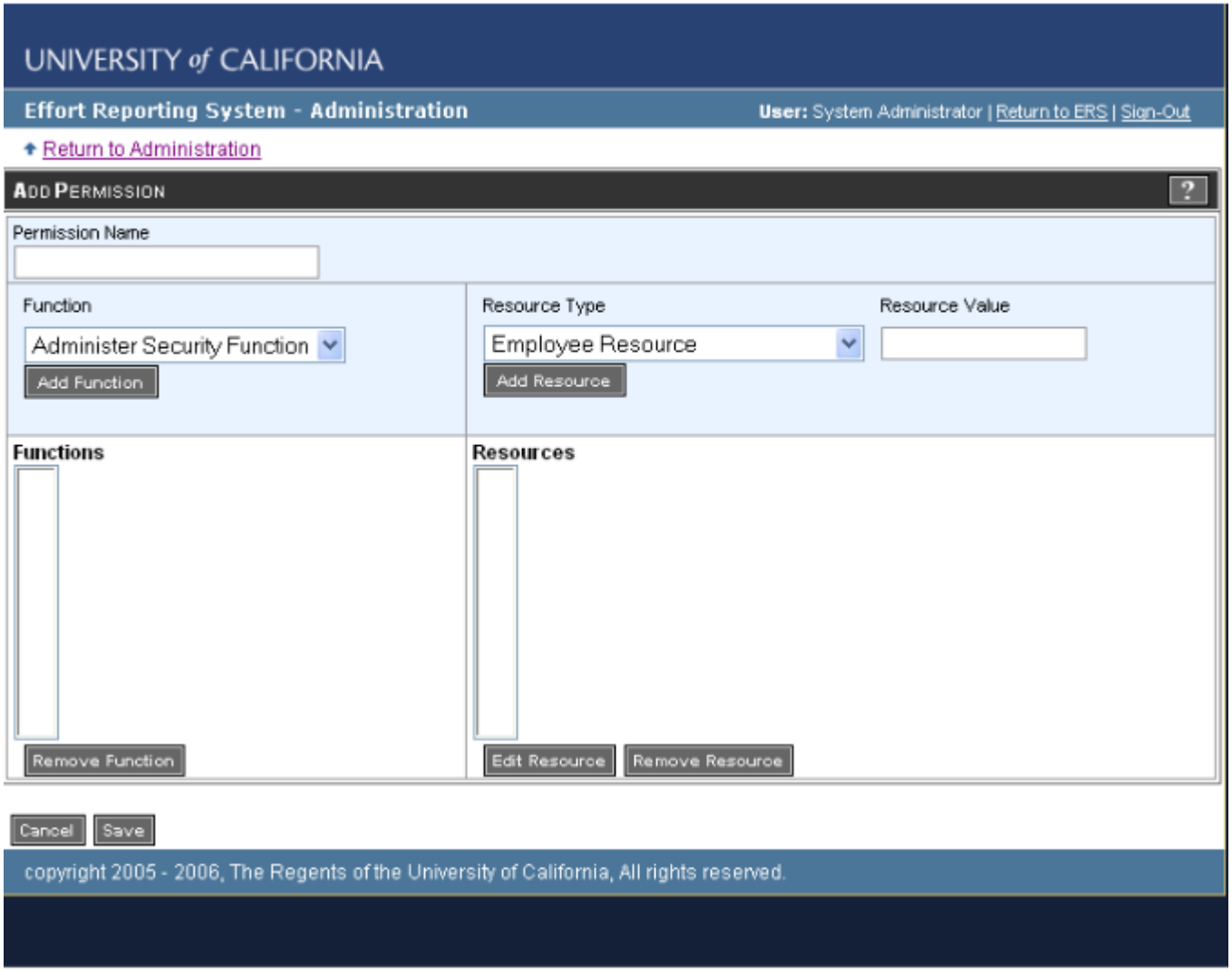
ERS shows the **Permission List** screen. A list of your previously defined permissions is displayed.

Click **Add Permission**.



How to Define Permissions

The Add Permission screen is displayed. This screen is used to assign Function and Resource Type to your permission.

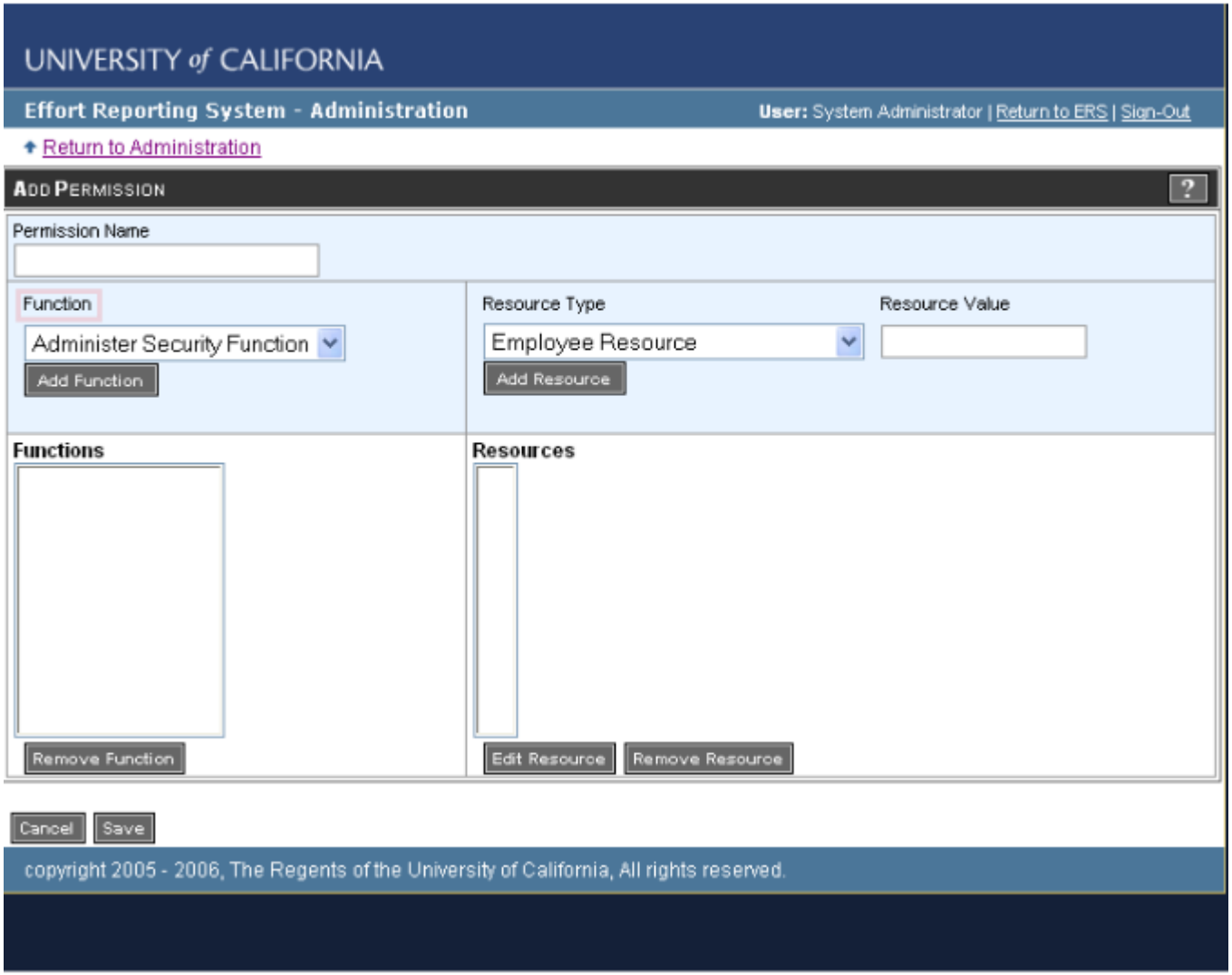


How to Define Permissions

To assign **Functions**:

Select desired functions from the drop down menu.

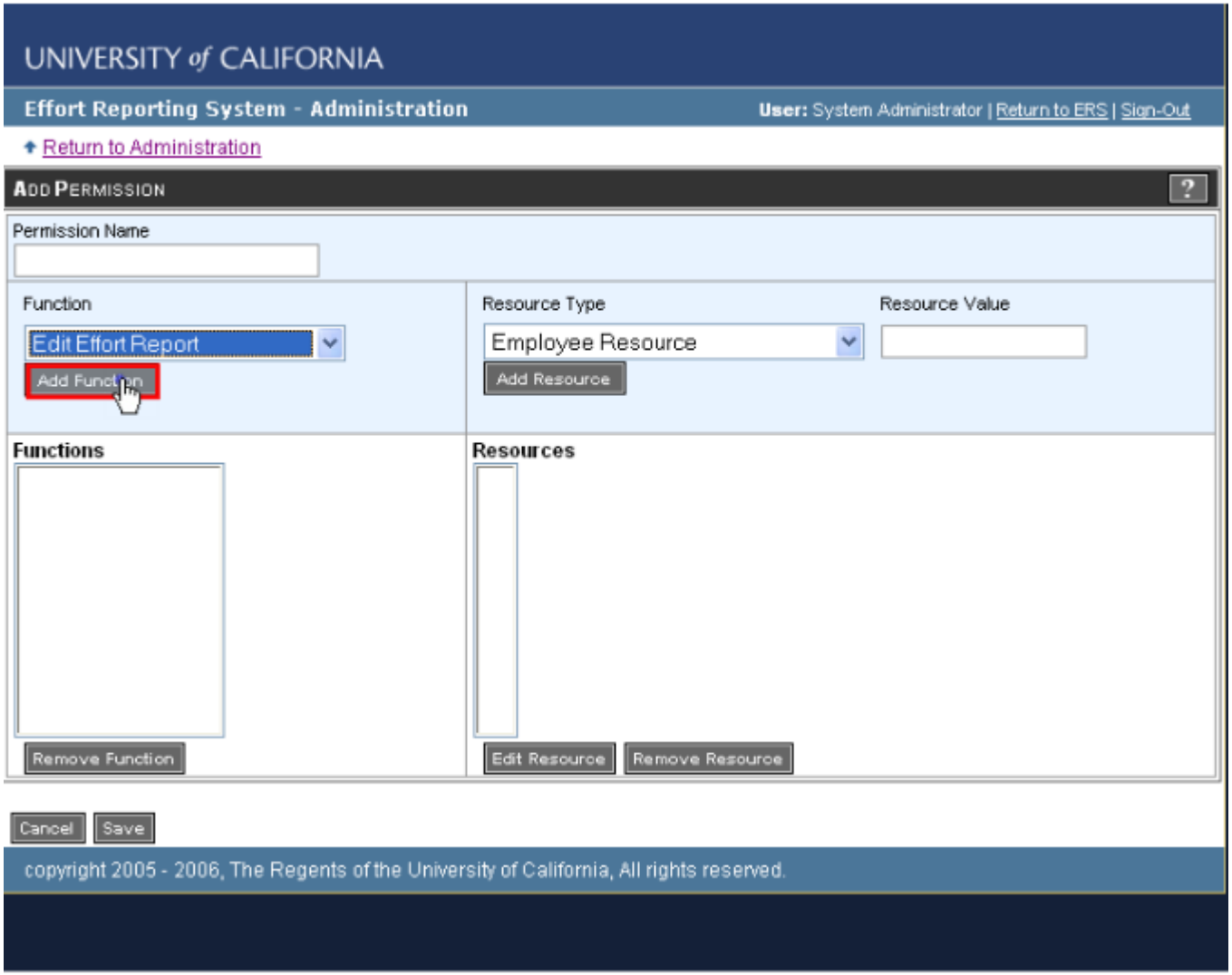
In this example “Edit Effort Report” is being added.



How to Define Permissions

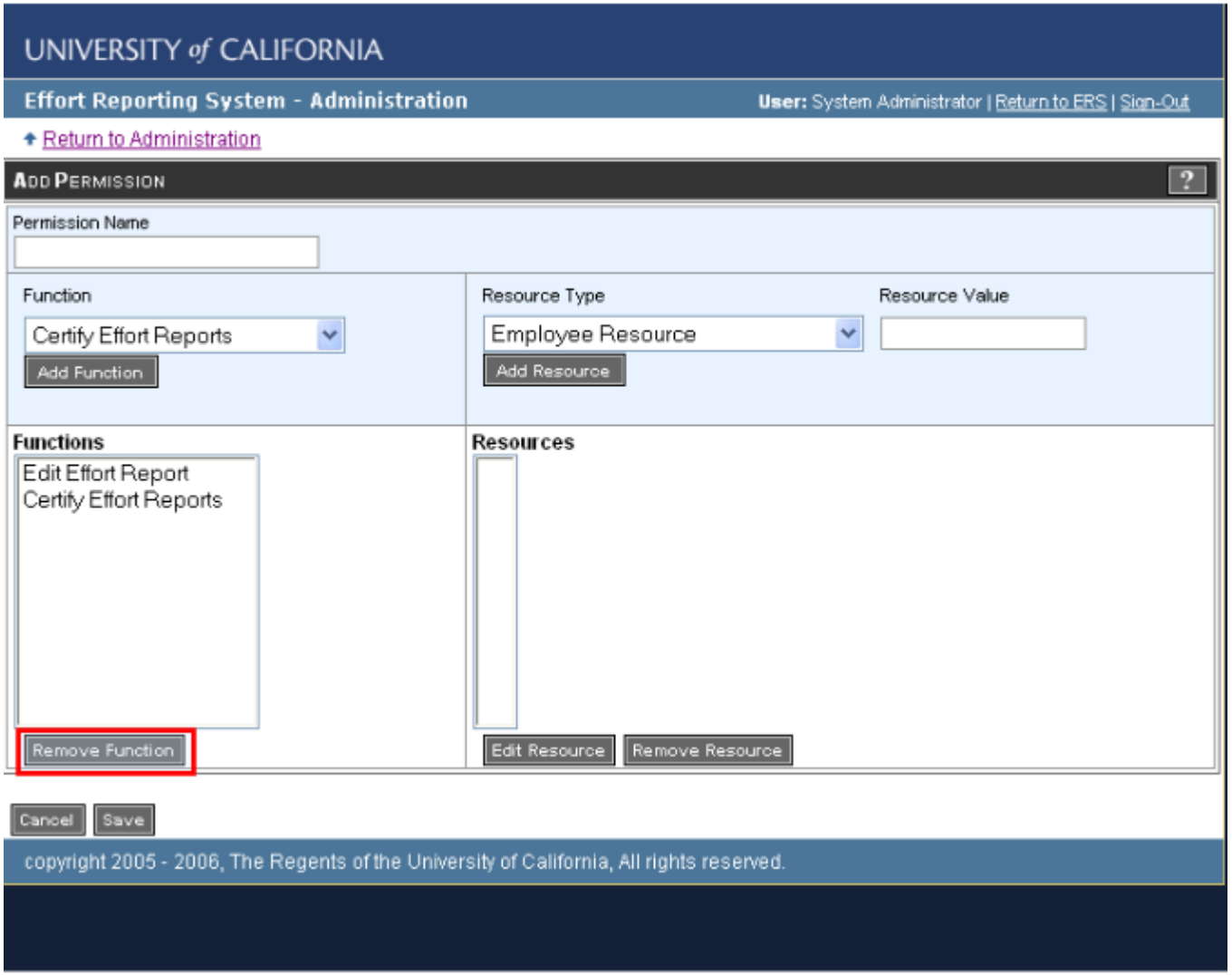
Click **Add Function** to add selected function to the list.

Select other functions as desired to add to the permission you are creating.



How to Define Permissions

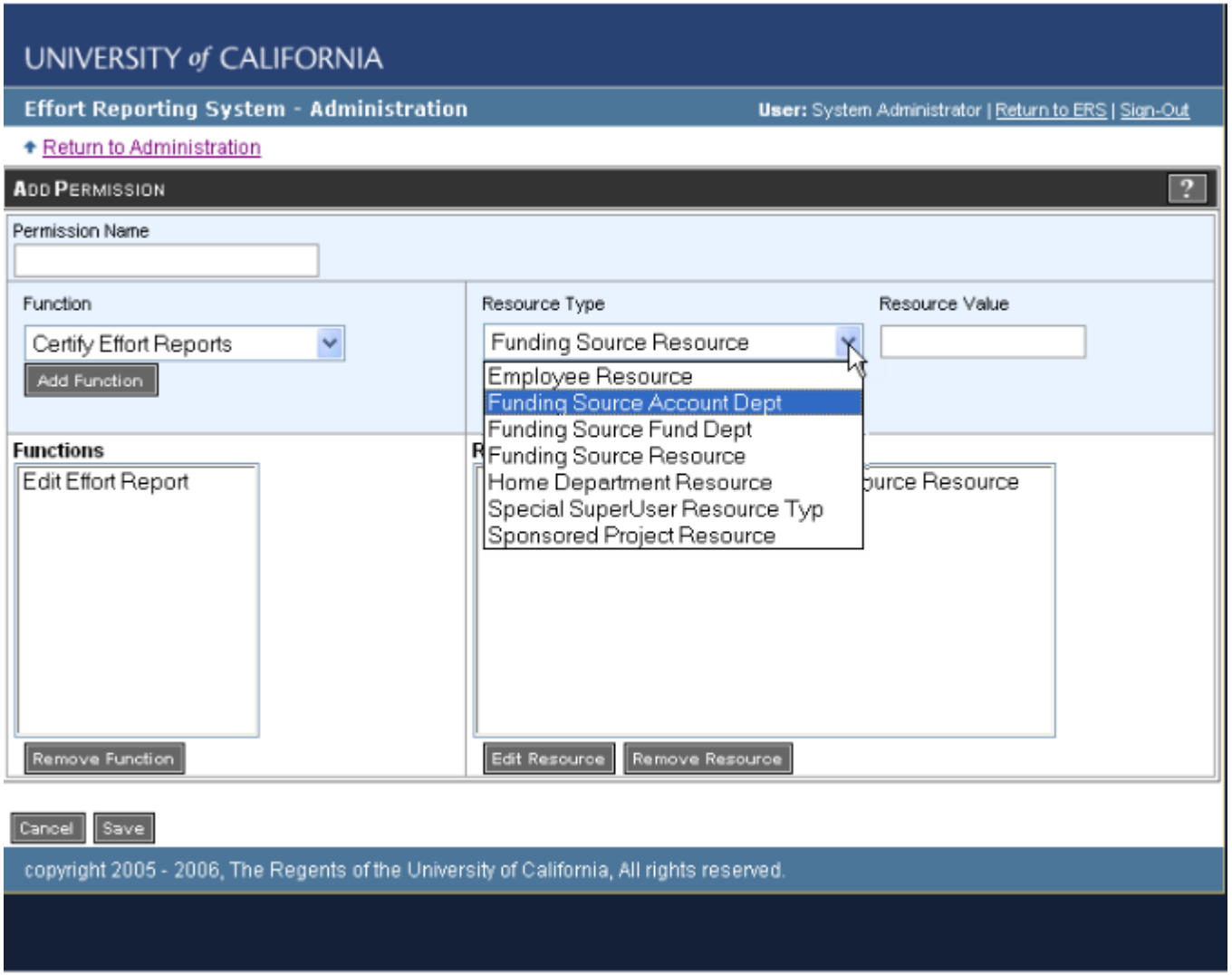
Click **Remove Function** to remove functions.



How to Define Permissions

To assign **Resource Type**:

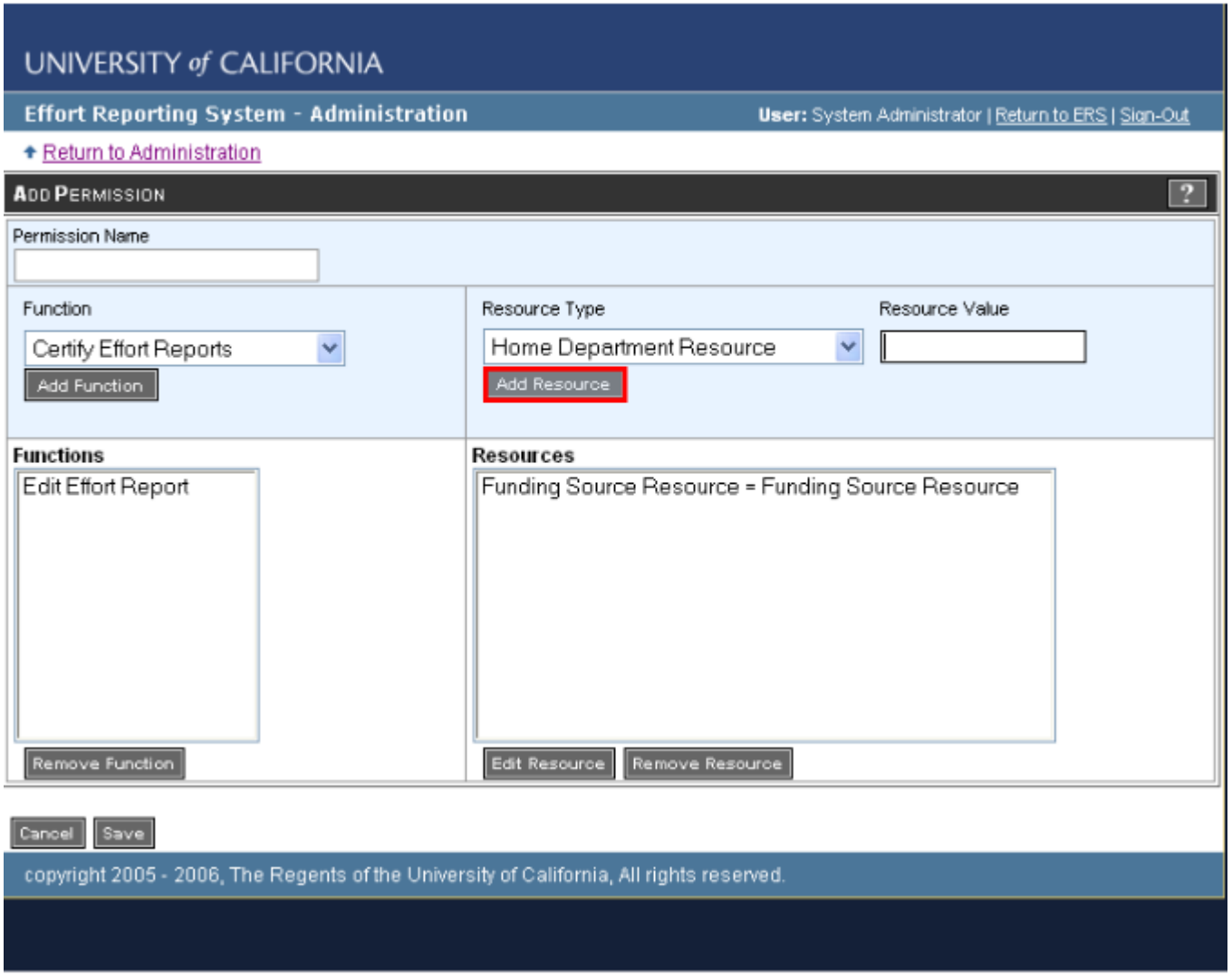
Select the desired **Resource Type** from the drop down menu and enter a value.



How to Define Permissions

Click **Add Resource** to add to the permission.

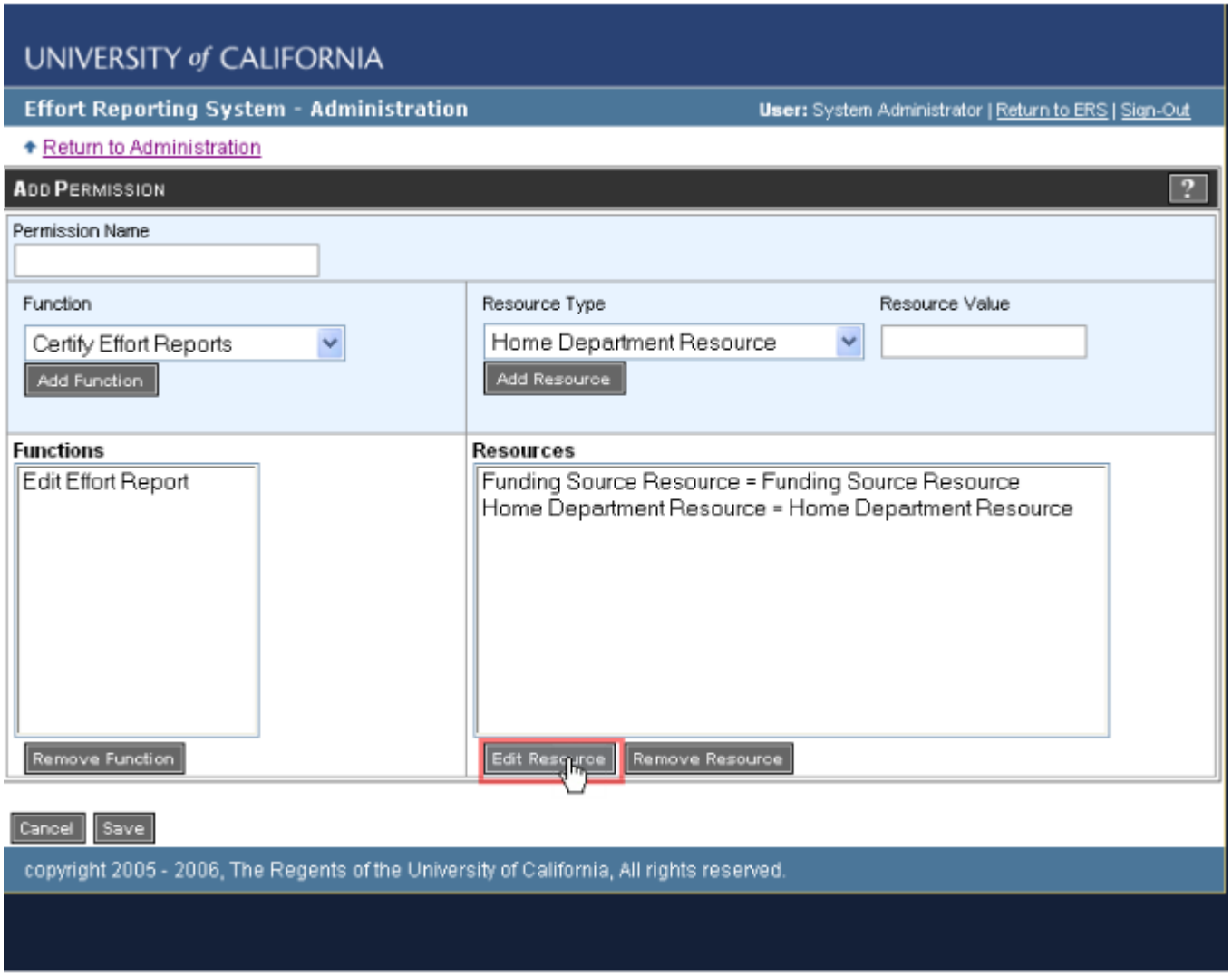
Repeat this process to add additional resources.



How to Define Permissions

Click **Edit Resource** to edit your selections.

Click **Remove Resource** to remove selected resources



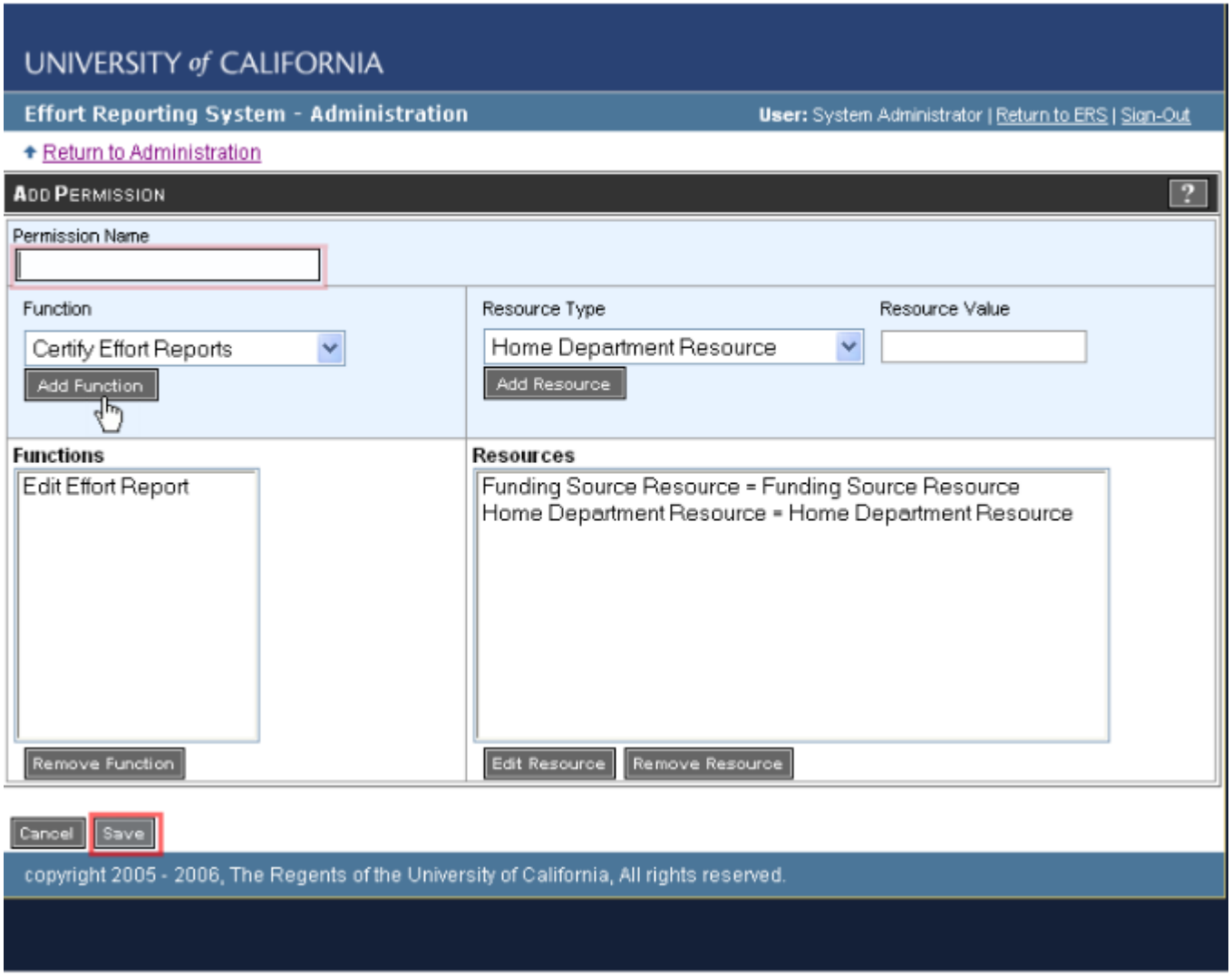
How to Define Permissions

After you have added functions and resources to your satisfaction, give your new permission a name.

Type the name into the **Permission Name** field.

Click **Save** to save your permission.

Click **Cancel** to cancel your permission.



How to Define Roles

Once you have created a permission, you must define a Role to ERS.

What are Roles?

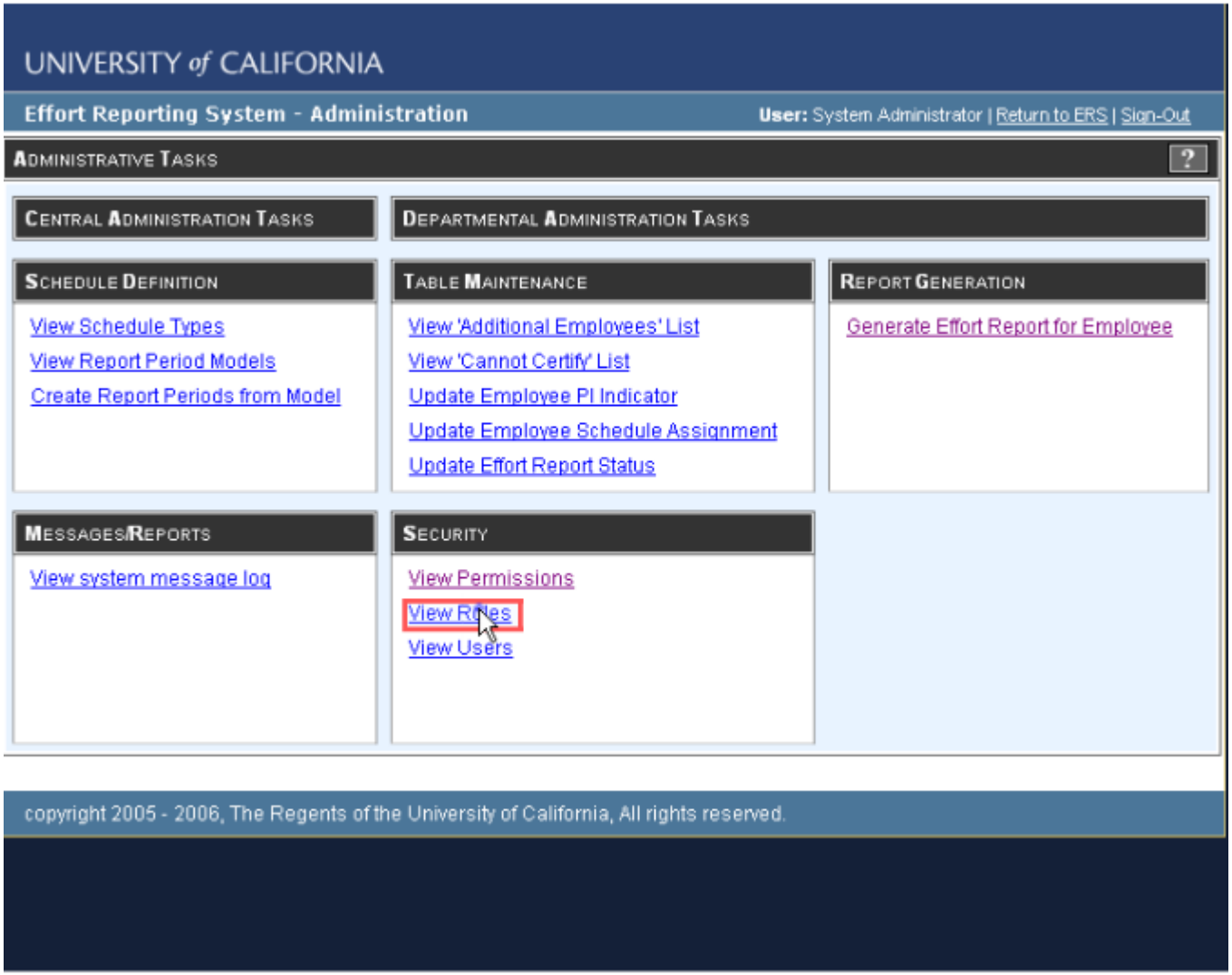
Roles are comprised of one or more sets of permissions that define what functions the user can perform and which Effort Reports the user can access. Roles must be established before an individual can be assigned to the role.

Once departments establish roles, they may add or remove one or more individuals to that role. The role generally remains static once it is created; although a role could be redefined if desired.

How to Create a Role

ERS roles are defined by assigning them one or more permissions.

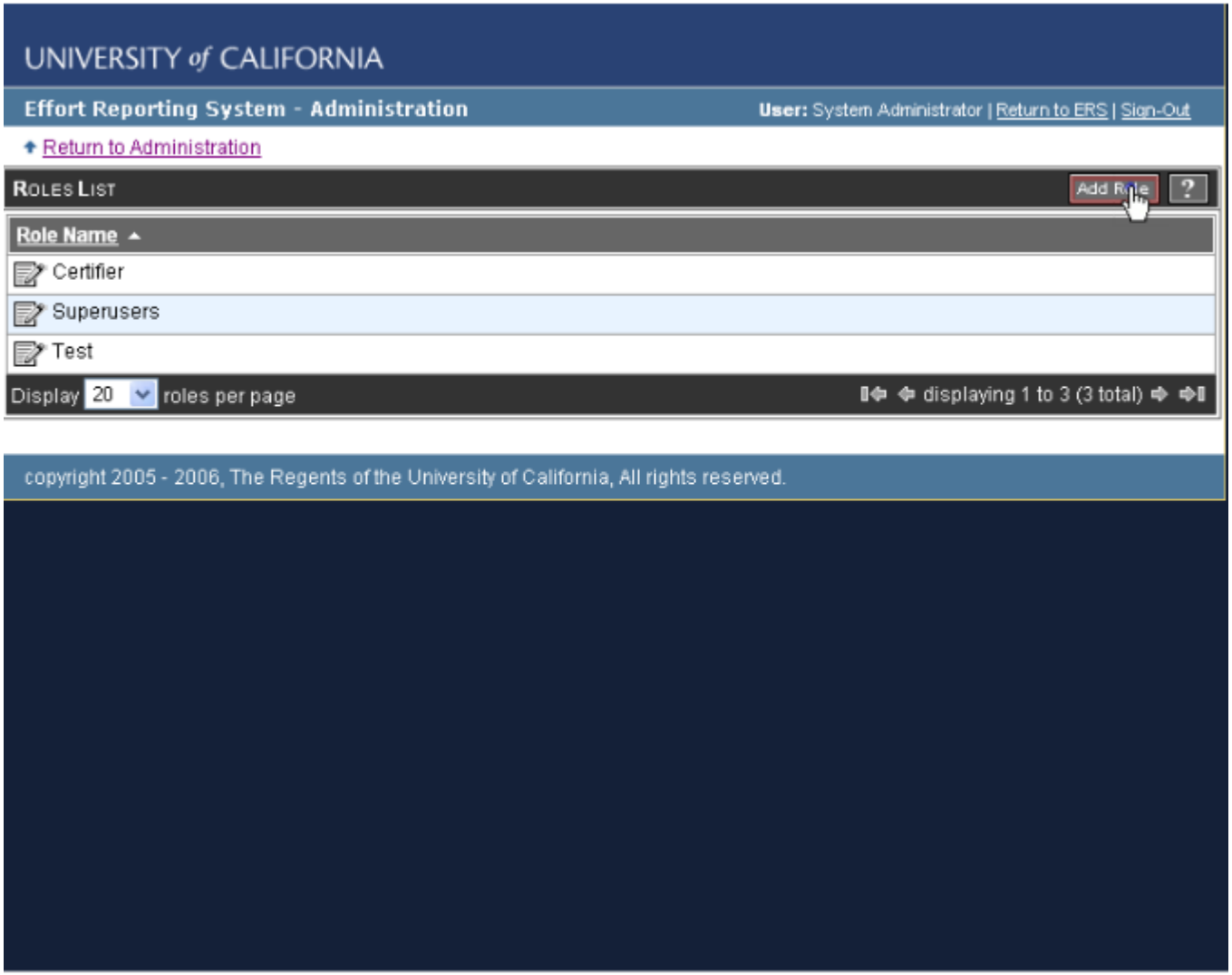
Click **View Roles** to begin the process.



How to Create a Role

ERS shows the **Roles List** with all **Role Names** on your list.

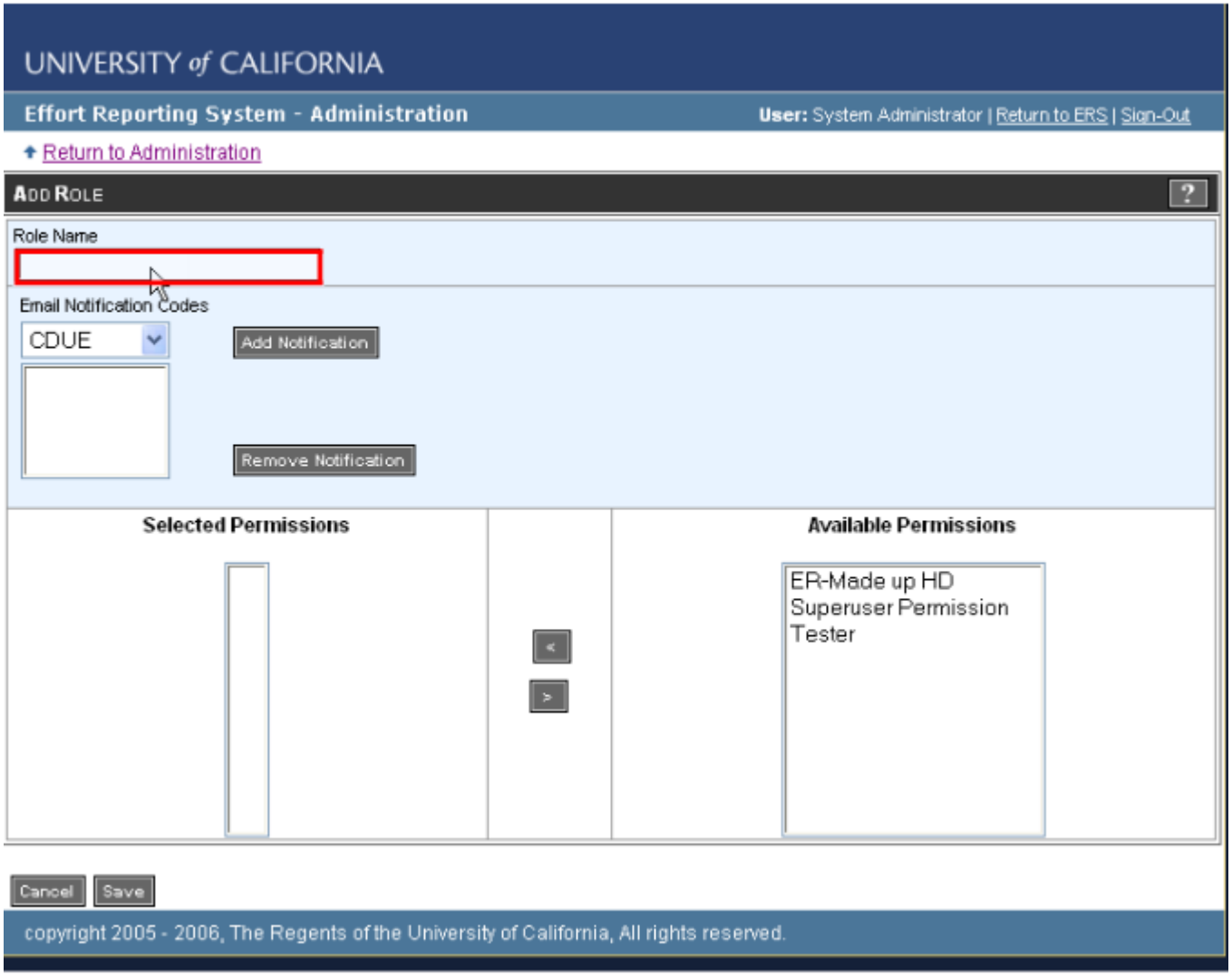
Click **Add Role**.



How to Assign Permission(s) to the Role

The **Add Role** screen is used to assign previously created permissions to a role. You may assign as many permissions to a role as is appropriate for your purposes.

Start by entering a **Role Name** into the highlighted field.

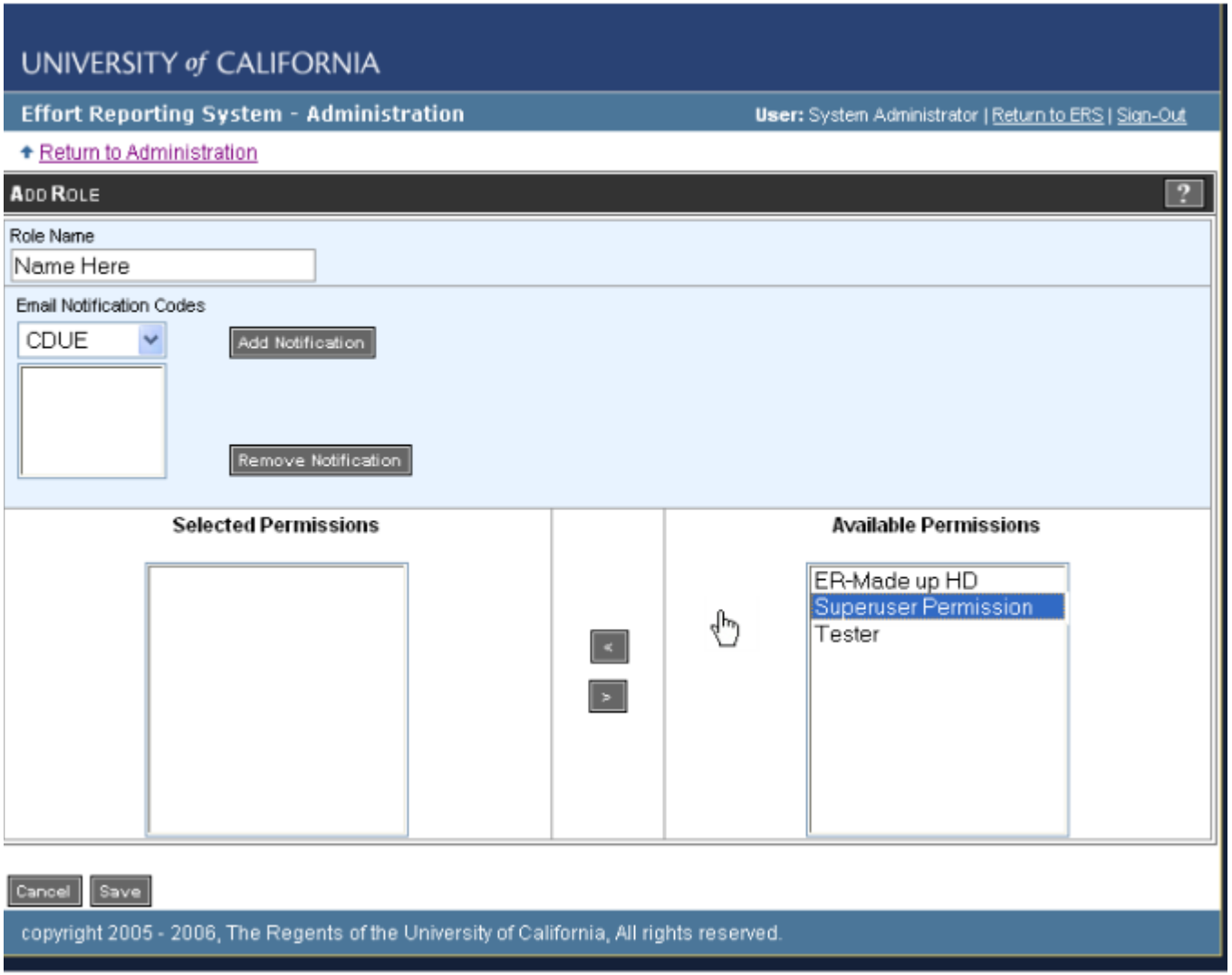


How to Assign Permission(s) to the Role

To assign permissions to a role:

- Review Available Permissions
- Select permission you want to assign to the role, using the click arrow buttons highlighted below.

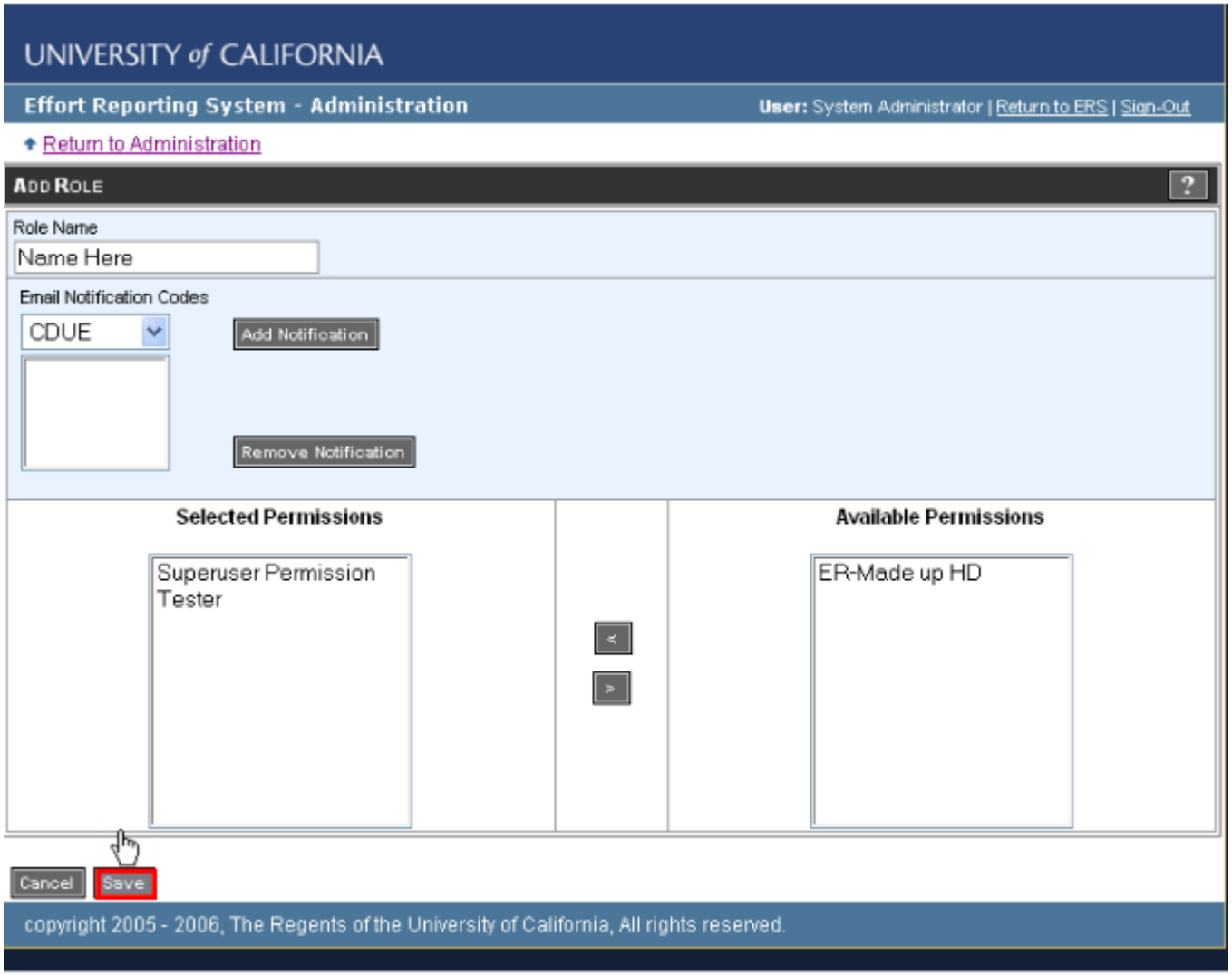
In this example, two permission have been added to the Selected Permission “bucket”.



How to Assign Permission(s) to the Role

Click **Save** to save your added role.

Click **Cancel** to cancel.



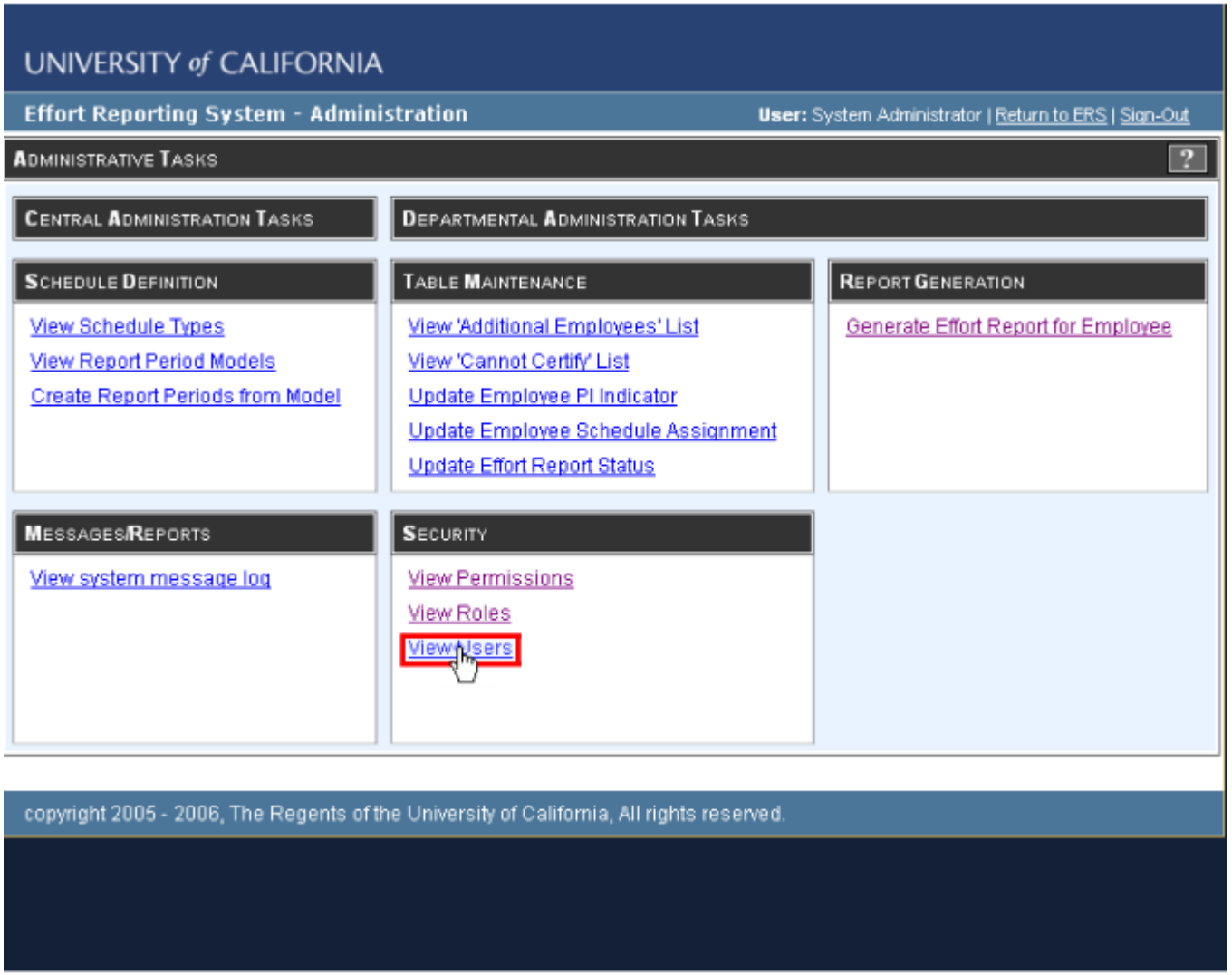
Assigning an Employee to the Role

Now that you have created permissions and assigned them to a role, the next step is to assign an employee to the role.

Once you do that, the employee will be able to perform the functions and look at only those Effort Reports specified by the Resource Type defined in the permission.

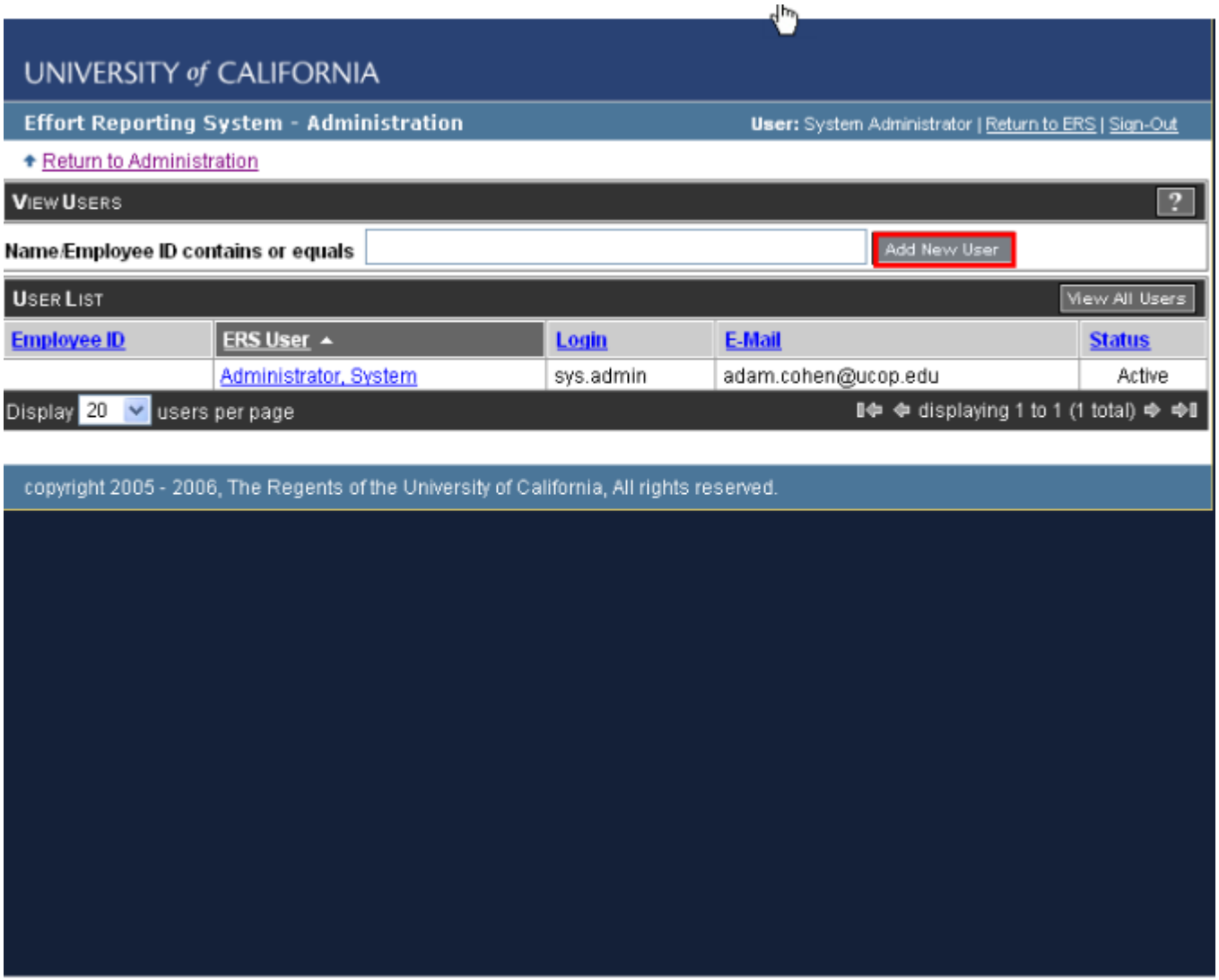
How to Assign an Employee to the Role

Click **View Users** on the **Administrative Tasks** screen.



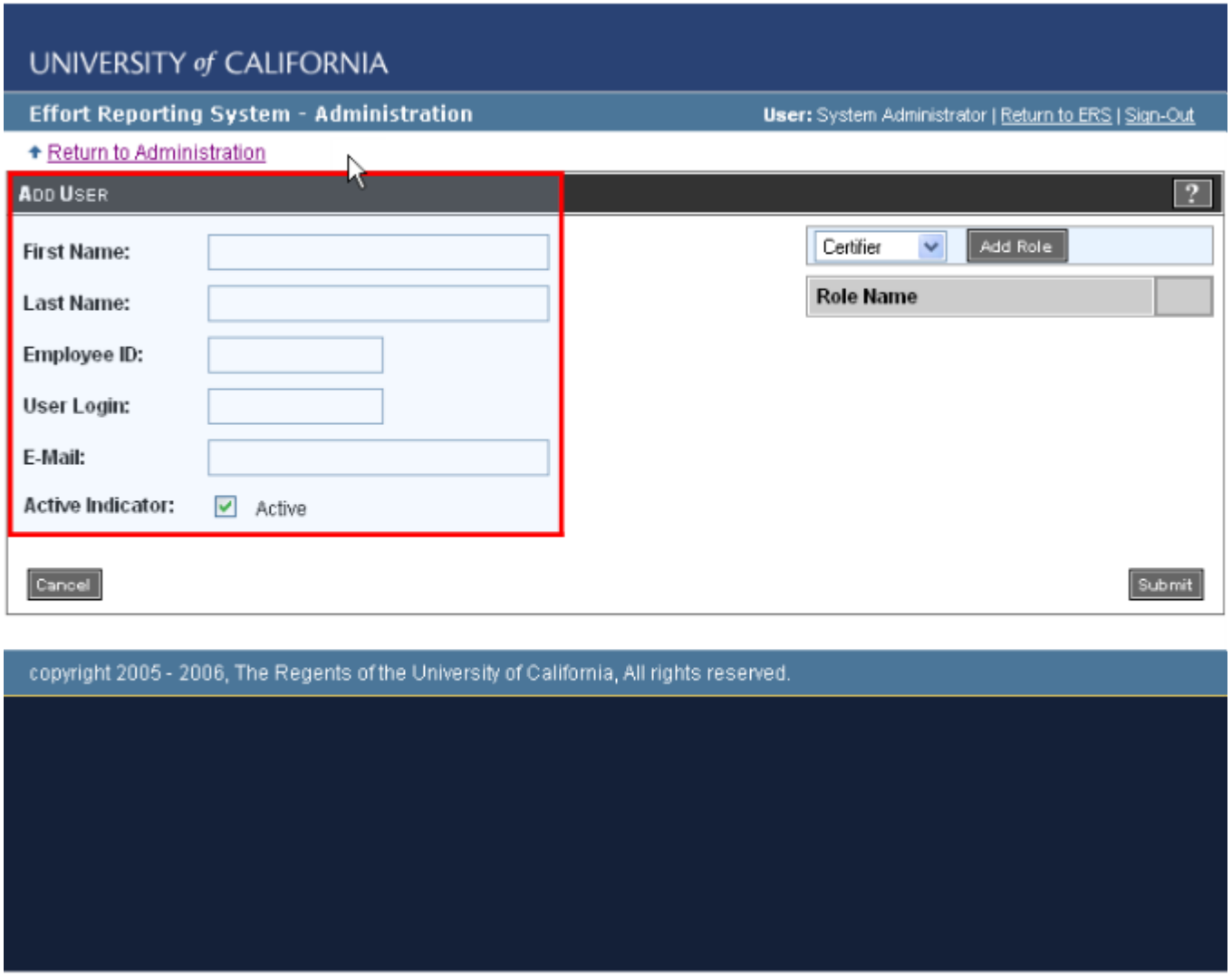
How to Assign an Employee to the Role

Click **Add New User** on the **View Users** screen.



How to Assign an Employee to the Role

Enter all information in the **Add User** fields.

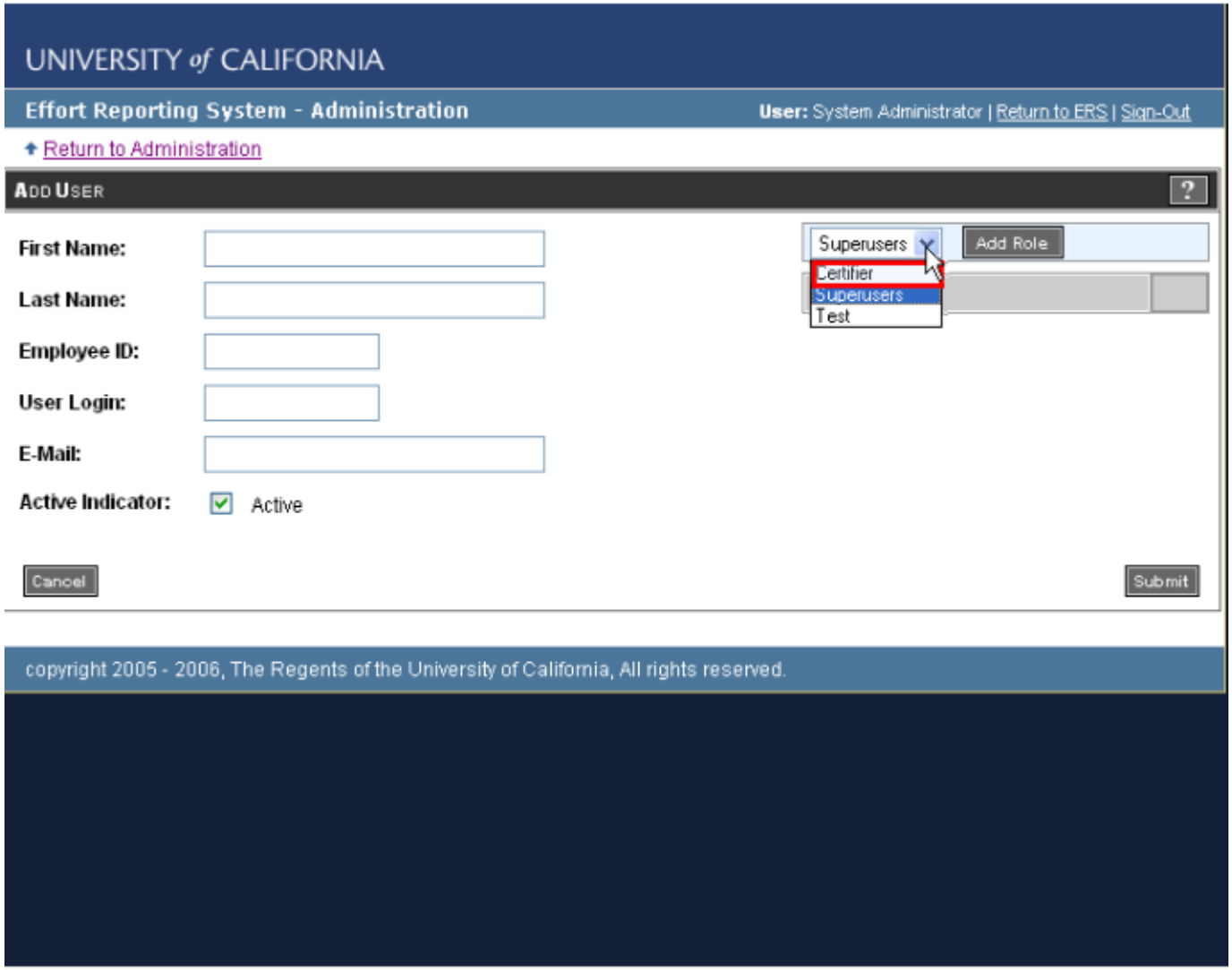


How to Assign an Employee to the Role

Assign the employee to a role using the drop down menu and **Add Role** button.

Click on the drop down menu to display role options.

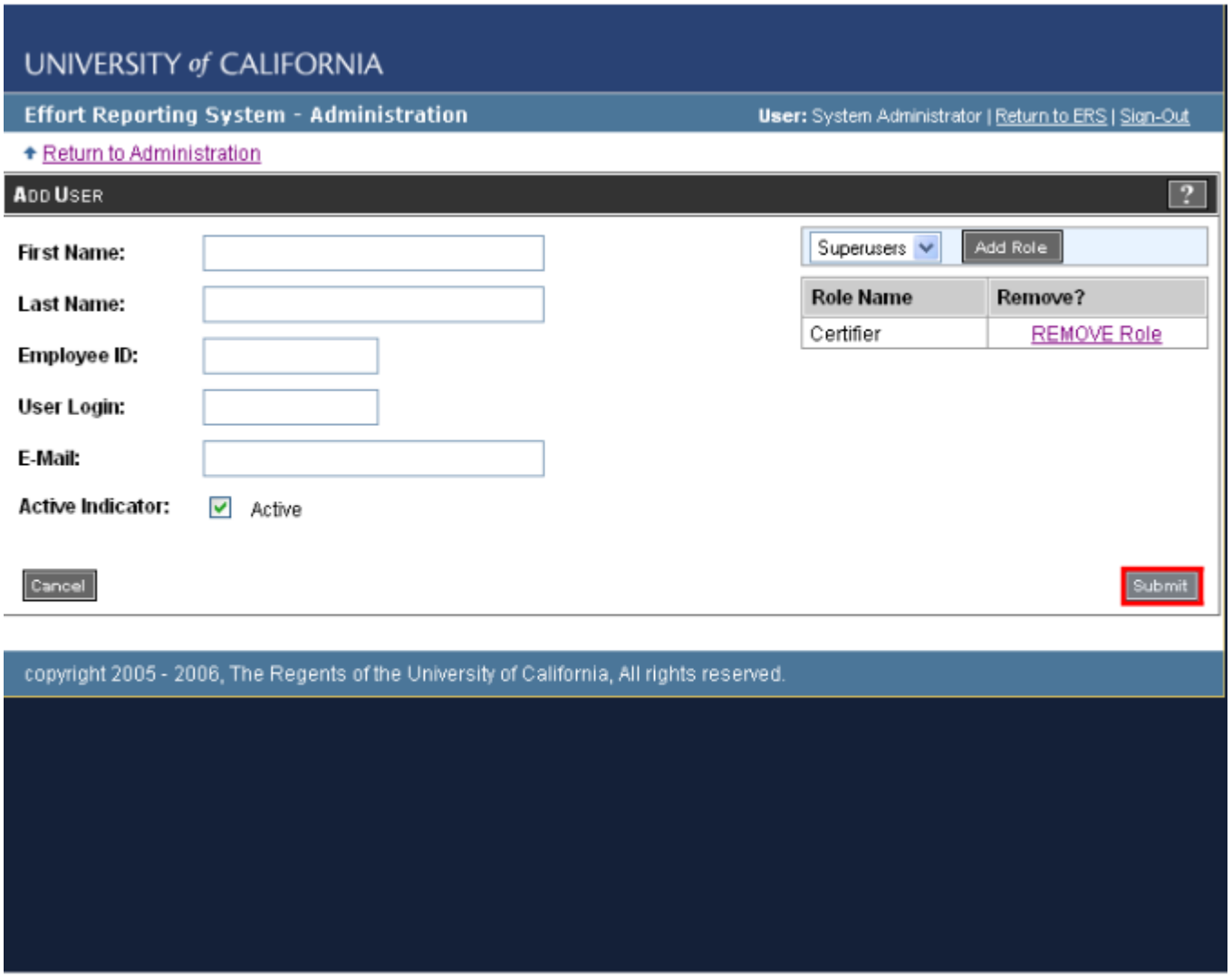
Select the appropriate role, then click **Add Role.**



How to Assign an Employee to the Role

Click **Submit** to complete the process.

Click **Cancel** to cancel your entry, if desired.



Setting up Authorizations – Review

To setup authorizations on ERS you:

- Create permissions
- Create roles
- Assign permission(s) to roles
- Assign individuals to roles

How to Set Up Roles to Receive Notifications

Although the ERS Coordinator function automatically receives the notifications generated by ERS, you may also designate other roles to receive notifications as well.

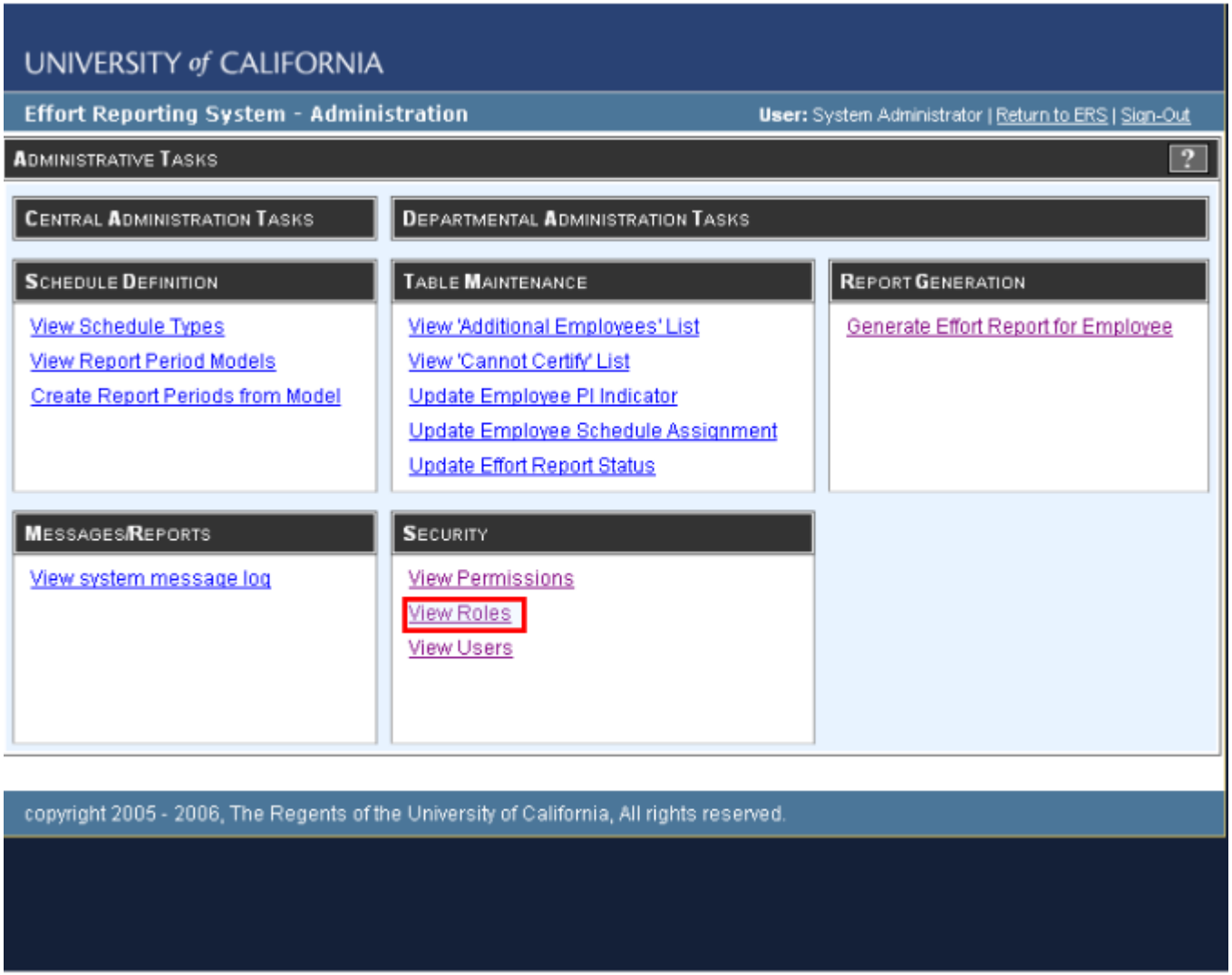
Before designating other Roles to receive ERS notifications, carefully consider the number of notifications that will be issued by the system and the number of users who will receive the notifications. It might be best to start out by having notifications go only to the Coordinator function.

Let’s look at how to designate Roles to receive Notifications.

How to Set Up Roles to Receive Notifications

From the **Administrative Tasks** screen:

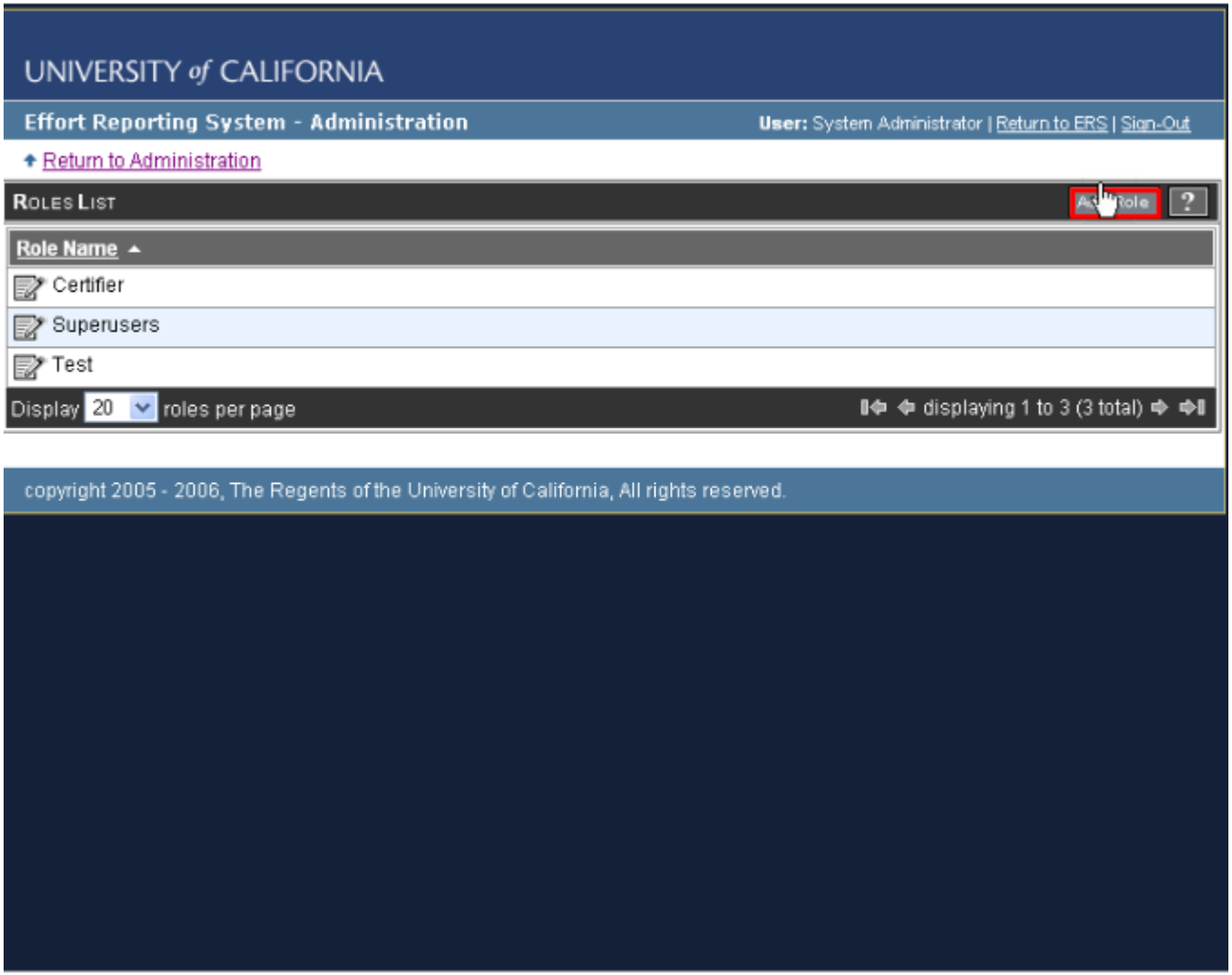
Click **View Roles** on the **Security** window.



How to Set Up Roles to Receive Notifications (cont'd)

From the **Roles List** screen:

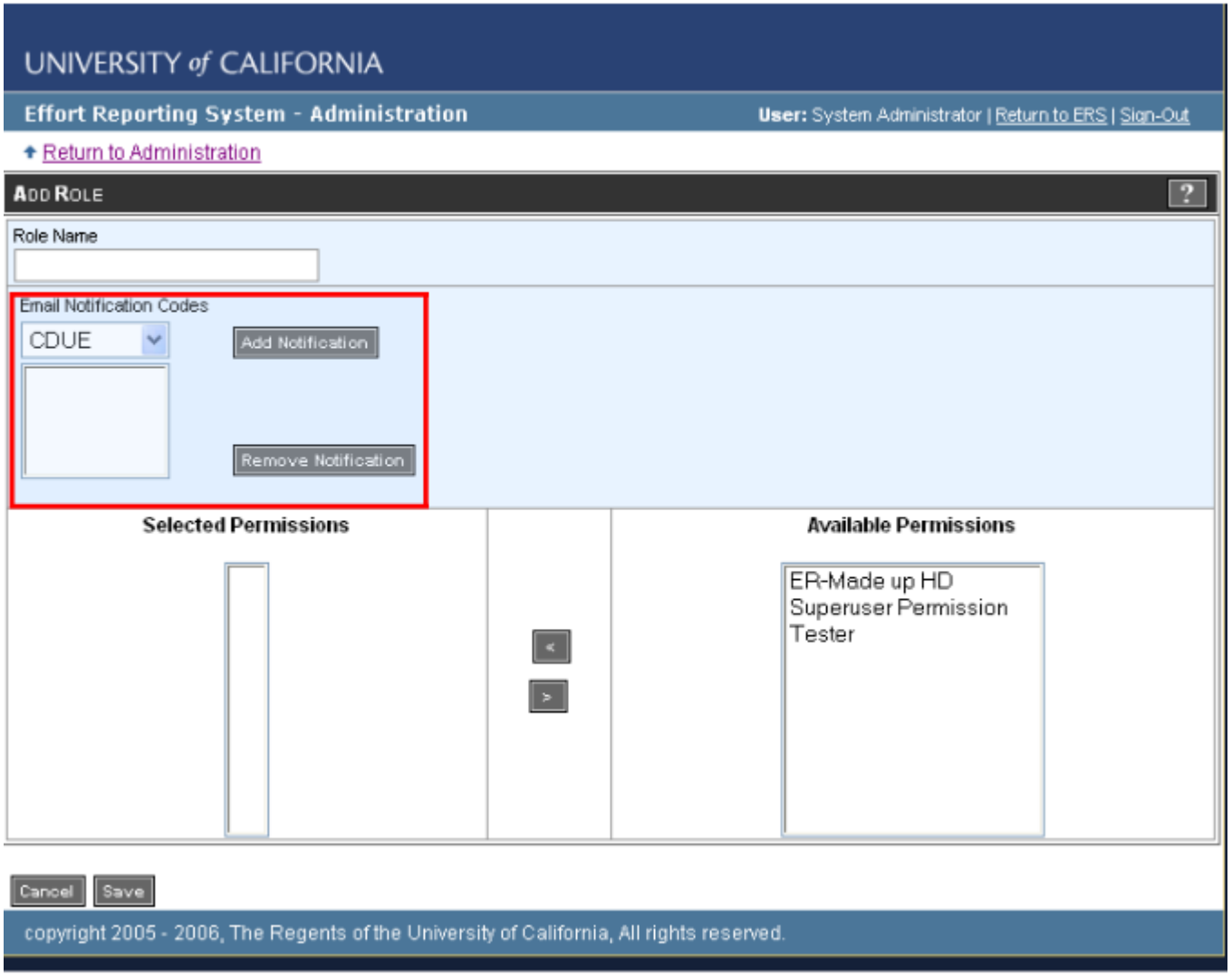
Click **Add Role**.



How to Set Up Roles to Receive Notifications (cont'd)

ERS displays the **Add Role** screen.

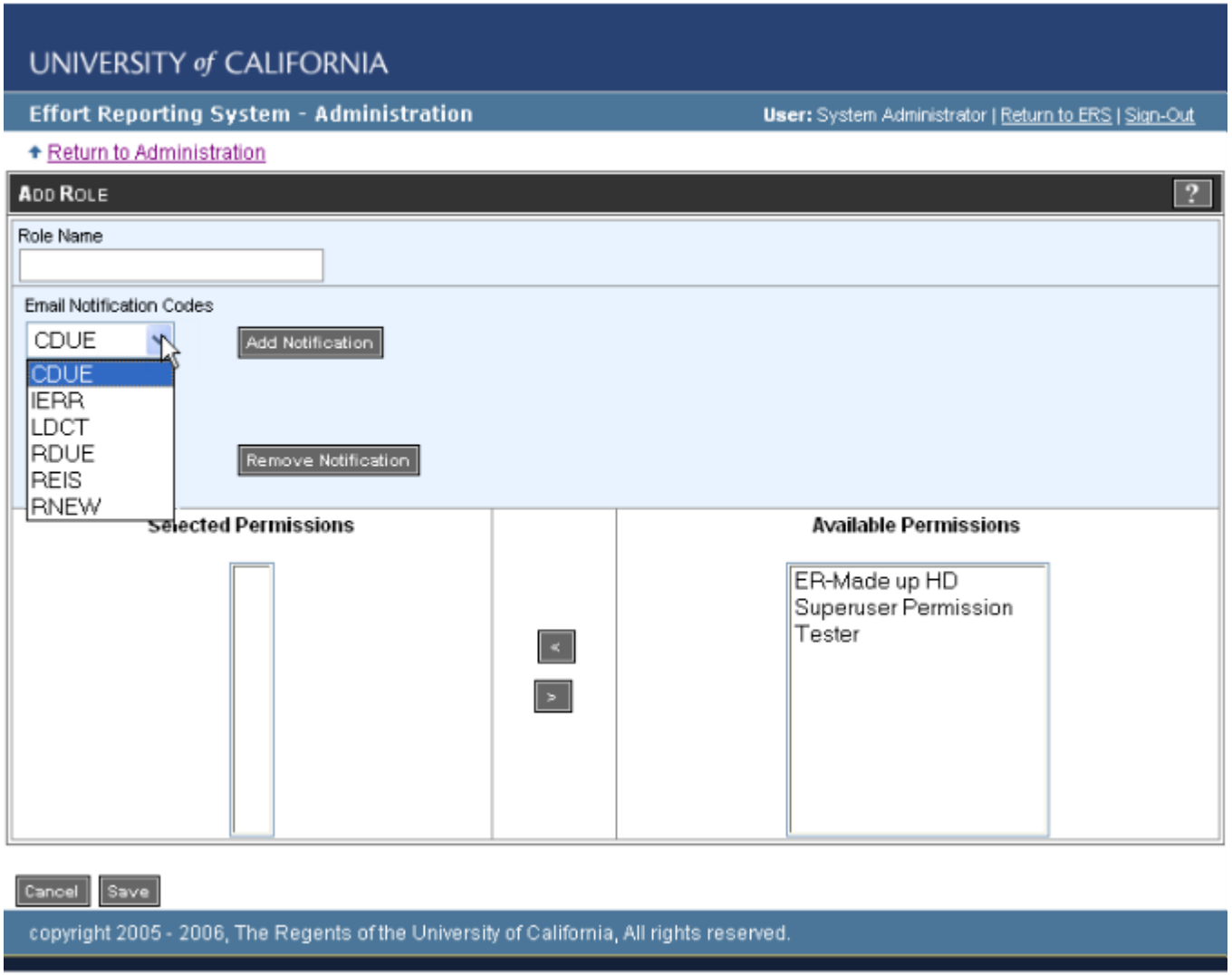
You set up roles to receive notifications using the tools in the highlighted area.



How to Set Up Roles to Receive Notifications (cont'd)

To set up a role to receive a notifications:

- Click the **Email Notification Codes** drop-down menu.
- Select the code that corresponds to the notification event you wish to assign to the role.
- Click **Add Notification**.
- Repeat for every notification you wish to add to the role.

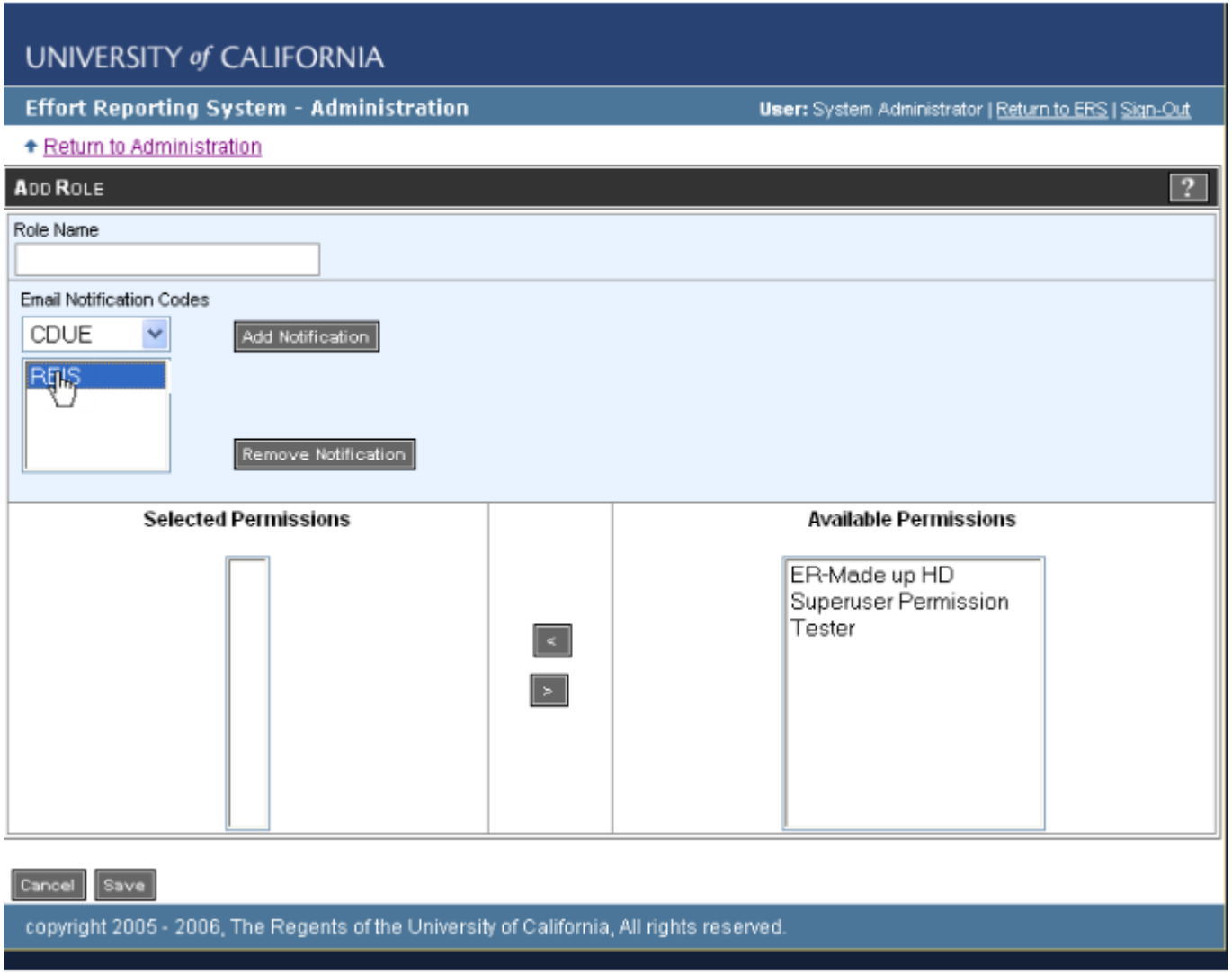


How to Set Up Roles to Receive Notifications (cont'd)

To remove a notification designation you don't wish to assign to the role:

Select the code, then click **Remove Notification.**

Repeat for every notification you wish to remove.



Conclusion

This concludes the ERS Authorization module. In this module you learned:

- How to create Permissions and Roles
- How to assign Users to Roles
- How to designate Resources
- How to designate Roles to receive notifications.