



Welcome to ERS Web-Based Training For Principal Investigators



Welcome to the Principal Investigator Web-Based Training for the Effort Reporting System (ERS)

This ERS training program is provided in a modular, web-based format to allow maximum flexibility for the User. These modules will allow you to:

- View the modules at your convenience
- Complete some modules and return to complete others later
- Access only those modules needed based on how you will use ERS
- Access modules as an ongoing reference source

Welcome to ERS Web-Based Modules

The modules contained in this program have been selected specifically for Principal Investigators.

The presentations convey information that makes it easy to understand how ERS works and how you can use the system to quickly complete the certifications process and monitor compliance.

Welcome to ERS Web-Based Modules

Modules are easy to use:

- Users control the pace of the modules by simply clicking through the presentation.
- Modules contain audio to enhance the presentation, but can be used without audio as well. If you do not have audio available, or prefer not to use it, you may proceed through the modules by simply reading the text provided.

Principle Investigator Program Content

There are 13 modules in the Principal Investigator program:

- Principal Investigator Welcome
- Policy and Compliance
- Orientation to ERS
- Accessing Effort Reports for PI's
- Creating Searches (optional)
- Report Lists
- The Effort Report
- Certifying Effort
- Cost Sharing
- Multiple Certifications
- Adding Additional Sponsored Projects
- Certification within Tolerance Threshold
- Compliance Monitoring Using ERS

Principle Investigator Program Content

Of these 13 modules, one module—Creating Searches—is optional. There are several things to consider in deciding whether or not the Creating Searches module will be helpful to you. ERS:

- Automatically provides Principal Investigators with easy access to their own Effort Reports and to a list of Effort Reports for all employees who work on their projects.
- Allows users to create very specific searches to identify sub-sets of Effort Reports, using various search criteria provided in ERS.
- Allows administrators to create refined searches which can be shared with and used by Principal Investigators.

Principle Investigator Program Content

If:

- You believe that you will use only the standard searches that are automatically provided by ERS, or
- You will rely on an Administrator to create specialized searches for you

Then there is no need to complete the Creating Searches Module.

Principle Investigator Program Content

If:

- You believe that you will want to view or access Effort Reports in specialized groups, and create your own searches, then you may benefit from completing the Creating Searches module.

You don't need to make a decision now. Before you can decide you will need to understand how ERS works, and how you can access Effort Reports.

Getting Started

We suggest that before you start, you print out the list of training modules at the beginning of this module. You can then use this as a checklist as you complete the modules and if you are interrupted or need to stop before you have completed all the modules, you will be able to pick up where you left off when you return to the program.

It should take approximately 60 minutes to complete the modules. Let's get started by reviewing the Principal Investigator Welcome module.