

## EFFORT REPORTING SYSTEM INSTRUCTIONS FOR VERIFYING PERMISSIONS DATA

### Step 1 – Review actions employees in your departments can take

View the special permissions given to the employees in your units with access to ERS. This list may include permissions to access effort reports belonging to other units. Review all permissions for each "Home Dept No." in column B using the filter as needed.

Things to consider:

- Have there been any personnel changes that require new permissions?
- Have any employees left the unit or had changes in responsibilities such that their permissions should be removed?

#### Example

A	B	C	D	E	F	G
Level 1 Org	Home Dept	Home Dept	Name	Roles	Resource type	Resource ID
BIOS	011016	MICROBIOLOGY	SMITH, JANE	Includes Payroll, Viewer, Coordinator	Acct Org	3 BCGD

Jane Smith has permission to view effort reports, including payroll data for any effort reports with salary charges to Accounts with the Org 3-BCGD. In addition, Jane is a Coordinator for these effort reports, which means she receives Coordinator communications regarding ERS. See the legend below for an explanation of the Roles, Resource Type, and Resource ID.

### Step 2 – Review actions others can take on effort reports for employees in your departments

View the permissions given out on the effort reports belonging to your units. This list may include employees in other units who have been given access to your departments' reports. Review all permissions for each "Resource Home Department No." in column J using the filter as needed.

Things to consider:

- Have there been any personnel changes that require new permissions?
- Have any employees left the unit or had changes in responsibilities such that their permissions should be removed?

#### Example

A	B	C	D	E	F	G	J	K
Level 1 Org	Home Dept No.	Home Dept	Name	Roles	Resource type	Resource ID	Resource Home Departmen t No.	Resource Home Dept Nam
OEVC	061000	OFFICES OF CHANCELLOR/PROVOST	THOMAS, ANN	Includes Payroll, Reviewer/Editor, Viewer	Employee	123456789	030170	FOOD SCIENCE & TECHNOLOGY
AAES	030170	FOOD SCIENCE & TECHNOLOGY	WILSON, MICHAEL	Includes Payroll, Reviewer/Editor, Viewer	Employee	123456456	030170	FOOD SCIENCE & TECHNOLOGY

Food Science & Technology has given permission to Ann Thomas, who works in the Offices of the Chancellor/Provost, to view effort reports including payroll data AND to review/edit the effort for any effort reports belonging to Employee 123456789. Food Science & Technology has also given permission to Michael Wilson, who works in that department, to view effort reports including payroll data AND to review/edit the effort for any effort reports belonging to Employee 123456456.

## LEGEND

**Roles** identify which tasks a user may perform. Roles are not cumulative, meaning a Certifier must also be given the roles of Viewer, Includes Payroll, and Reviewer/Editor.

Role	What It Means
Coordinator	Coordinators receive communications regarding most ERS issues. This may not include notification of issues identified that are related to a particular effort report or account, which are generally sent to the fiscal officer on the affected account.
Viewer	Person with this permission can view effort reports based on the Resource Type and Resource ID specified.
Reviewer/Editor	Person with this permission can edit effort reports based on the Resource Type and Resource ID specified.
Includes Payroll	Person with this permission can view the payroll associated with effort reports based on the Resource Type and Resource ID specified.
Certifier	Person with this permission can certify effort reports based on the Resource Type and Resource ID specified.

**Resource Type** and **Resource ID** together identify the effort reports to which the permission allows access.

Resource Type	Resource ID	What It Means
Account Org	Organization Code	Person with this permission can access any effort reports where the employee's salary was charged to an account with the specified organization code. Account Org is assigned on the KFS Account.
Fund Org	Organization Code	Person with this permission can access any effort reports where the employee's salary was charged to an account where the corresponding Award has the specified organization code. Fund Org is established in the KFS Award.
Account Org Hierarchical	Organization Code	Person with this permission can access any effort reports where the employee's salary was charged to an account with the specified organization code or any subordinate orgs. Account Org is assigned on the KFS Account.
Fund Org Hierarchical	Organization Code	Person with this permission can access any effort reports where the employee's salary was charged to an account where the corresponding Award has the specified organization code or any subordinate orgs. Fund Org is established in the KFS Award.
PPS Home Department	PPS Home Department Code	Person with this permission can access any effort reports where the employee's PPS home department matches the specified code.
Employee ID	Employee ID Number	Person with this permission can access any effort reports where the employee's ID matches the specified employee ID number.
Chart-Account	Chart Account Loc Fund	Person with this permission can access any effort reports where the employee's salary was charged to the specified account.