Date: November 1, 2017

From: Debra Henn

To: Assistant Dean contacts

Cc:

Subject: Annual Confirmation of ERS Roles and Permissions

Attachment: Instructions for Verifying Permissions Data.doc, Active permissions 10-24-2017.xlsx

Dear Assistant Dean,

In preparation for the generation of our annual effort reports, we need your help to validate the special roles and permissions that have been created in ERS.  System permissions automatically allow any employee with an effort report access to their own report and any Principal Investigator may access all reports related to projects for which he/she is the PI.  All other access requires special permissions.  The attached workbook contains special permissions assigned in ERS pertaining to your units as of October 24, 2017.

A document with instructions for reviewing the permissions is attached.  ***Please review the workbook and make any requests for additions, changes, or removals by Thursday, November 9, 2017.***  The effort certification period is targeted to start on Wednesday, November 15, 2017.  While we will accept permission change requests after that date, it is helpful to have the correct permissions in place prior to the start of the certification period to facilitate achieving 100% certification by January 29, 2018 in accordance with UC policy.

Requested Actions:

* For any *additions or changes*, complete either the [VIEW OR EDIT ACCESS REQUEST FORM](http://afs.ucdavis.edu/systems/effort-reporting-system/documents-folder-not_used_by_navigation/ERS_Access_Form.doc) or the [CERTIFICATION PERMISSION REQUEST FORM](http://afs.ucdavis.edu/systems/effort-reporting-system/documents-folder-not_used_by_navigation/ERS_Access-Cert_Form.doc).  These forms are used to request ERS permissions for an individual who needs to view, change, or certify effort reports.  Return one form per individual to[ershelp@ucdavis.edu](mailto:dshenn@ucdavis.edu) as soon as possible.  When requesting certification permissions, it is not necessary to also submit a View or Edit Access Request form for that individual.
* To *remove* permissions for individuals who have left the department or other permissions that are no longer valid, please send your request via e-mail to [ershelp@ucdavis.edu](mailto:dshenn@ucdavis.edu) .

If you have questions about assigning roles and permissions in ERS, please contact me at [tcmontgomery@ucdavis.edu](mailto:tcmontgomery@ucdavis.edu).

Thank you,

Trent

<sig>

Attachments:

Instructions for Verifying Permissions Data

Active Permissions spreadsheet