

Effort Reporting System (ERS) Quick Start Guide

CGA Help Desk: 643-4246 (8-5 Mon-Fri)

ERS URL: <https://controller.berkeley.edu/cga/effort-reporting>

Login to ERS: Click the “Login to ERS” button to bring up the CalNet login page

CalNet Login: Login with your CalNet ID and password, which will then bring you to your previously-set ERS default page

Find information on Comment requirements, setting up Searches, Cost Sharing, etc. in ERS Job Aids.

Navigate and Subscribe to PI’s My Projects Lists (when first using ERS)

➤ **NAVIGATE:** Click the page title to navigate between pages

REPORT LIST

MANAGE SEARCHES

SEARCH REPORTS

➤ **SUBSCRIBE:** Find the Effort Reports your PI needs to review and certify

- From **Manage Searches** page, click “Subscribe” button on bottom left corner of page.

SUBSCRIBE
- Find PI, and click “Subscribe” next to PI’s name.
[This adds a **My Projects** search to your **Manage Searches** page, which will update with every reporting cycle.]
- Repeat step 2 for each PI under your responsibility.

Find Effort Reports (after you’ve Subscribed and Saved Searches)

➤ **VIEW EFFORT REPORT LIST:** Navigate to **Effort Report List** page (or click on a saved search from **Manage Searches** page)

- **Display Saved Search:** switch between saved searches
- **Show Status:** filter list by specific status (or “ALL”)
- **Reporting Periods:** filter list for specific Reporting Period (or “ALL”)
IMPORTANT: Filters remain set until you select a new value

➤ **VIEW EFFORT REPORTS:**

- From Effort Report List, click on the row to view an Effort Report
- Use arrows to scroll through a list of Effort Reports

⏪ ⏩ displaying 1 to 27 (27 total) ⏪ ⏩

Questions to ask when deciding whether or not to certify an Effort Report

REMEMBER – The certifier MUST have first-hand knowledge of the effort

- Is the Effort Report for another PI or Faculty member?**
 - YES: DO NOT certify
 - NO: Go to question 2
- Does PI have first-hand knowledge of all effort on the Effort Report?**
 - YES: PI can certify entire report
 - NO: Go to question 3
- Does PI have first-hand knowledge of some effort on the Effort Report?**
 - YES: Use Multiple Certification feature so PI can certify individual row(s)
 - NO: DO NOT certify anything

Key Questions

- **Who has access to certify or re-open an Effort Report?**
 - Person named on the Effort Report (listed on **My Effort Reports** List)
 - PI at the Fund-Dept level for any fund on the Report (listed on **My Projects** List)
 - PI at the Fund level for any fund on the Report (NOT listed on **My Projects** List)
- **What if another PI certified effort on my PI’s (or Faculty’s) Effort Report?**
Your PI or Faculty can re-open the report and re-certify it. PIs DO NOT certify for other PIs or Faculty. Notify the other PI’s ERC of the error to prevent it from occurring in the future.
- **What if someone else certified an Effort Report on my PI’s My Projects List?**
This may be OK if they addressed the questions in the box above. Your PI may not be the only one with first-hand knowledge of the effort.
- **Why does ERS use Payroll to estimate Effort?**
A basic assumption is that people are *paid* at a level *equivalent* to their *Effort*. Therefore, payroll data is used to estimate effort. Part-time employee effort is extrapolated to 100%. For example, a PT employee is paid 5% on a fund and works only 35% time: ERS % effort displays as 14% (5% divided by 35%).
- **Why are there multiple versions of an Effort Report and where are the Comments?**
Effort Reports start as v1.0 and are saved as new versions each time a report is changed, saved or certified. Comments are saved to the version on which they are added. To view comments for all versions of an Effort Report, click on the **Comment Log** tab. To view all versions of an Effort Report, click on the **View/History** tab.
- **What are the next Reporting Cycles and Deadlines?**

Semiannual Reporting Period	Adjustment Period	ERS Availability	ERS Certification Deadline
1st Semiannual Period (January 1 – June 30)	July – August	September 1	October 28
2nd Semiannual Period (July 1 – December 31)	January – February	March 1	April 30