

JOB AID



ERS Tips for the Principal Investigator

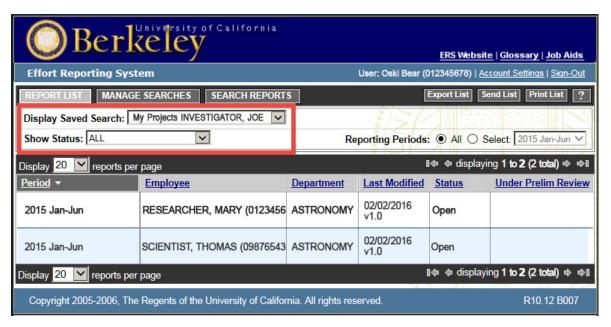
This Job Aid provides useful information on ERS functionality to help PIs better manage the Effort Report review and certification process in ERS.

This Job Aid covers the following:

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ERS Notifications.	

Effort Report List Page

When you first sign in to ERS, you are taken to your **My Projects** list on the **Effort Report List** page. This is the starting point to review all of the individual Effort Reports on funds where you are the primary PI. On this page you can view a list of the individuals with effort on your projects, the reporting periods, and the certification status of each of the reports.



This page is divided into two sections: **top section** and **body section**.

TIP: To review your own Effort Report, it may be faster to open your **My Effort Reports** saved search instead of sorting through a long list of reports on your **My Projects** list.

Top Section



- Display Saved Search gives you the option to select either your My Projects list or My Effort Reports list.
- 2. Show Status allows you to refine your list to display only those reports for a specific status. Below are the various selections and the results displayed for each:

Status	Results displayed for selected Reporting Periods			
ALL	Displays every report. This is the best view to ensure everything is reviewed.			
	Displays Effort Reports with the following Status:			
ALL-Open	• Open			
	Open-Reopened			
	Partially Certified			
	Exception			
	Certified/AdjustReqd			
	Open-Reissued			
ALL-Certified	Displays Effort Reports with the following Status:			
	Certified			
	Certified/AdjustReqd			
ALL-Overdue	Displays all Effort Reports that are past the due date for the Reporting Period AND DO			
ALL-Overdue	NOT have a status of Certified or Not Required .			
Open	Displays reports that require certification.			
Certified	Displays reports that have been certified and no further action is required.			
Open-Reopened	Displays reports that were previously certified and have been re-opened by the PI, and			
	require recertification.			
Partially Certified	Displays reports requiring multiple certifications, and require additional certification.			
Required	Displays all Effort Reports EXCEPT those with a status of Not Required .			
Not Required	Displays reports that DO NOT require certification.			
Exception	Displays reports with a status of Exception , which may indicate a calculation issue that			
	causes them to be out of balance when created.			
Certified/AdjustRegd	Displays reports that have been modified by either the Reviewer or PI, and certified by			
Continou// tajaoti toqu	the PI. The report requires a Payroll Expense Transfer.			
	Displays previously certified reports that have been reissued by ERS after a payroll			
Open-Reissued	expense transfer has caused an imbalance between the Original Payroll and the			
	Adjusted Payroll. These reports require modification and certification.			

3. Reporting Period - lets you refine your list to include only those reports for a specific period.

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

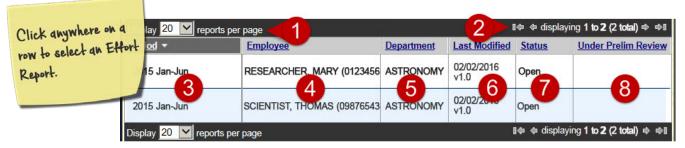
- 4. Export the list to an Excel file.
- 5. Send the list via email.
- 6. Print the list.

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TIP: Always check the **Show Status** and **Reporting Period** filters to make sure you are viewing your list of reports in the way you expect to see it. ERS saves the last filter you applied, and displays your list with that same filter until you change the filter settings. For example, if you set the **Status** to "Open-Reopened", the next time you sign in to ERS, only the "Open-Reopened" Effort Reports will be displayed.

Body Section

The body section displays the list of Effort Reports, either your **My Projects** list or **My Effort Reports** list. This list can tell you a lot about an Effort Report without actually showing you the report. Below is a sample **My Projects** list:



- 1. Display X reports per page lets you list 10, 20, 30, 50 or 100 reports at one time.
- 2. Displaying X to X (X total). The arrows enable you to quickly page through your list; each page shows the number of reports per page you selected in item 1, above. This is very helpful during the review and certification process.

The column headers listed below can be selected to sort the list according to the selection. In the example above, Period is selected and the reports are sorted accordingly.

- Period shows the Reporting Period of the report, and from which you can ascertain Academics and Non-Academics.
- 4. Employee lists the individual's name and Employee ID.
- 5. Department lists the name of the employee's home department.
- Last Modified lists the last modified date and version number of the report. See Version Number details below.
- Status states the status of the report (see chart on previous page).
- Report Under Preliminary Review indicates that the effort report is still being reviewed by when this box is checked.

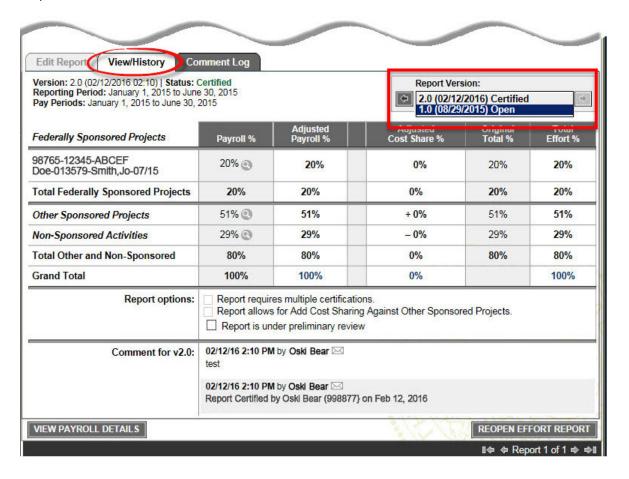
Version Numbers

ERS tracks each iteration of the Effort Report and assigns a new version number each time it changes. The Version Number is listed on the **Effort Report List** page and on the **Effort Report itself**.

- The first Effort Report for the reporting period is identified as Version 1.0.
- After any changes are saved, ERS assigns the report a new version number by decimal increments; e.g., **1.1**, **1.2**, **1.3**, etc. (thus, 1.4 denotes the fourth iterative change to the effort report prior to certification)
- Once the report is certified, ERS assigns the next whole number; e.g., 2.0, 3.0, etc.
- If a certified report is re-opened, ERS assigns the next decimal number; e.g., 2.1, 3.1, etc.

Viewing Effort Report Versions

To view earlier versions of an Effort Report, go to the **View/History** page and click on the drop down list under **Report Version**. This will show all previous versions of the Effort Report. You can scroll through the different versions by clicking on the left and right arrows to the left and right of the drop down list.



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