

Effort Reporting System (ERS) User Access Form

Instructions: Department Manager/Administrator completes **Section A** and the subsequent Sections as instructed in item 4 below. Add comments or additional information on page 2. Submit form electronically to CGA Help at cgahelp@berkeley.edu or fax to 510-643-8997.

Section A – All fields are required

1. Department Manager/Administrator completing this form:

First Name: Last Name:
 Email Address:
 Phone Number: > Please enter phone in format XXX-XXX-XXXX

2. ERS User—activate, deactivate, or modify access for the following employee (*only one user per form*):

First Name: Last Name:
 Employee ID number: Email:

Dept L4 **and** L5 org node(s): *5-character level 4 **and** level 5 processing unit(s) in the UCB org tree
 Optional: Attach copy of department org tree with codes highlighted
 (**See Instructions**—unlike BFS, ERS is not designed hierarchically.)*

3. Effort Report Coordinator for the department:

First Name: Last Name:
 Email Address:
 Phone Number: > Please enter phone in format XXX-XXX-XXXX

4. Type of Request (*only one request per form*):

- Activate User** – complete **Section B** to activate a user who is new to UCB or new to the department; includes ERCs, Reviewers, and Viewers.
- Deactivate User** – complete **Section C** to deactivate a user who has separated, left the department, or no longer requires access to ERS; includes ERCs, Reviewers, and Viewers.
- Modify User** – complete **Section D** to modify a user's role

Section B – Activate User

Identify User's role in ERS: (*choose one*)

- Reviewer** – post award administrator with access to review and edit effort reports
- Viewer** – department manager with access to view effort reports before or after certification
- Effort Report Coordinator (ERC)** – department coordinator for the effort report certification process
- Reviewer + ERC**

ERCs, Reviewers, and Viewers are required to complete the ERS Training Course in UC Learning Center before receiving access to ERS. Please verify that User has completed the training by checking the box below:

Yes, User has completed the ERS Training Course

NOTE: Every ERS User must have an **email address** and **CalNet authorization**

Section C – Deactivate User

Effective date of deactivation: > *Please enter as MM/DD/YYYY*

NOTE: One ERC must be assigned to each department. If you are deactivating your department ERC, you must also complete an additional **ERS User Access Form** to add the ERC role to another user in the department

Section D – Modify User

User's Current Role in ERS:

- Reviewer
- Viewer
- Effort Report Coordinator (ERC)
- Reviewer + ERC

User's NEW Role in ERS (choose one):

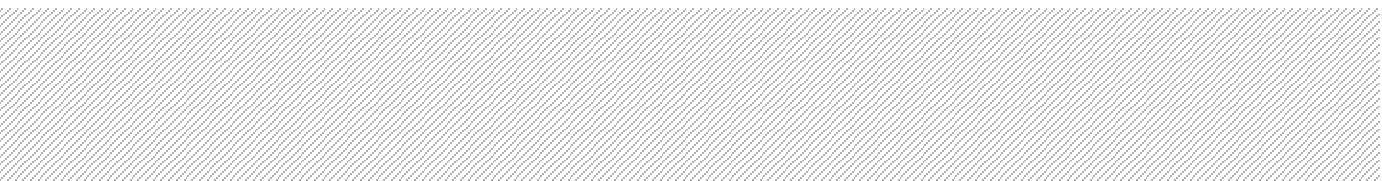
- Reviewer
- Viewer
- Effort Report Coordinator (ERC)
- Reviewer + ERC
- Other Request** (*Enter instructions in Comments box*)

NOTE: One ERC must be assigned to each department. If you are moving the department ERC to another role, you must also complete an additional **ERS User Access Form** to add the ERC role to another user in the department

Comments

Departmental Approval

Name: _____ **Signature:** _____ **Date:** _____
Title: _____ **Email:** _____ **Phone:** _____



For ERS Security Administration use only

ERS Notes/Comments

ERS Approval

Name: _____ **Signature:** _____ **Date:** _____

Instructions for Completing ERS User Access Form

When to Use This Form: To set up a new user, modify a current user, or remove a previous user's access to a department's Effort Reporting System data and reports.

Section A – All fields must be completed

1. Enter the name, email, and phone number of the Department Manager/Administrator completing this form.
2. For the ERS user whose access is being added or changed, enter the employee name, employee ID number and email address. Enter the level 4 **and** level 5 org nodes for which this ERS user is responsible.

NOTE: ERS access is assigned using the **5-character** level 4 and level 5 processing unit codes from the UCB chart of accounts organization tree. This allows departments with several L4 and L5 units to authorize access to a specific unit or units within your organization. For unrestricted access to effort reports for your department PIs, please enter all of your unit's **L4 AND L5** org codes (unlike BFS, ERS is not designed hierarchically).

3. Enter the name, email, and phone number of the department's Effort Report Coordinator.
4. Check the appropriate box – only **one** request per form.
 - Activate** User – check this box and complete **Section B** to set up a new user
 - Deactivate** User – check this box and complete **Section C** to deactivate a current user
 - Modify** User – check this box and complete **Section D** to modify a current user's role

Section B – Identify the user's role in ERS by checking the appropriate box (choose **one** only). ERCs, Reviewers, and Viewers are required to complete six ERS Training Modules in UC Learning Center before receiving access to ERS. Check the training box to verify that this user has successfully completed the required training.

Section C – To deactivate a current ERS user, enter the effective date of deactivation.

Section D – To modify a user's role, in the first column check the appropriate box indicating the user's current ERS role, in the second column check the appropriate box indicating the user's NEW role in ERS.

NOTE: One ERC must be assigned to each department. If you are moving the department ERC to another role, you must also complete an additional ERS User Access Form to add the ERC role to another user in the department.

Comments – Add any comments or additional pertinent information in this field.

Departmental Approval – Complete all fields in this section. The ERS User Access Form must be signed by the Department Manager / Management Services Officer (MSO) before it is submitted. Or, submit form via email to cgahelp@berkeley.edu with a copy to the Department Mgr/MSO.

Submit completed ERS User Access Forms to:
CGA Help at cgahelp@berkeley.edu (cc to the dept mgr/MSO) or fax to 510-643-8997.