Effort Reporting System (ERS) Update

Research Administrator's Forum
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Topics

• User Feedback
• New System Features
• Frequently Asked Questions
• Ongoing Communication

User Feedback
“We’ve Heard Your Concerns”
We’ve Heard Your Concerns

- Certification Deadlines
  - 30 days insufficient time to complete all certifications
  - Frequent and unpredictable system downtime makes certification difficult and frustrating
- What we are doing to address the problem:
  - Working as part of a system-wide effort to revise policies to allow for a longer certification window
  - Continuing to monitor performance and make system adjustments to improve response time
  - Reviewing schedules to ensure whenever possible, planned downtime will occur outside of a “certification period”
  - Posting schedules well in advance so users can anticipate upcoming certification cycles and when ERS will be unavailable

We’ve Heard Your Concerns

- Communication
  - Lack of updates and notifications regarding new system features, upcoming certification cycles, etc.
- What we are doing to address the problem:
  - Developing a communication plan
  - Establishing an ERS mailing list to reach a wider audience
  - Publishing a newsletter, “ERS Extras,” to communicate important system features, shortcuts and frequently asked questions; will be distributed regularly and topics to be driven by user request

New System Features

“Did You Know?”
“Managing Investigator”

- UCLA has introduced a new “Managing Investigator” concept
- Previously...
  - “Co-Investigators” could not see in their “My Projects” list effort reports for individuals paid from their FAU (account, cc, fund)
  - Effort reports for all individuals paid from a fund, regardless of account or cost center, appeared in the “My Projects” list of the PI designated on the fund.
  - As a result, PIs who had responsibility for certifying effort reports for individuals paid on their FAUs could not access those reports.
  - The “My Projects” list of the designated PI included reports for many individuals for whom another PI had primary responsibility.
- Now...
  - The Managing Investigator concept solves both of those problems by allowing a PI to be designated for each FAU.
  - Once a department has set up the “Managing Investigator” for each FAU, the “My Projects” list for each PI will display only reports for individuals under their FAU.

Access to Effort Reports that Cross Departments

- Previously...
  - ERS based access to effort reports on home department code only.
  - Reviewers and certifiers could not access reports for individuals who belonged to a different home department or had a dual-appointment.
- Now...
  - Any ERS user (Viewer, Reviewer, Certifier and Coordinator) can view reports for individuals across departments, so long as the home department code, the account department code, or the fund department code, is a department code for which he/she has been granted access.

Subscribe to a PI’s “My Projects” list

- You can subscribe to a Principal Investigator’s “My Projects” list
- Authorized users can access and view effort reports as they would appear to the PI in his/her “My Projects” list.
- This may be particularly useful for department administrators and/or ERS coordinators, who perform an initial review of effort reports for all individuals paid from a particular PI’s project.
- Dynamically saved search; updates automatically when the PI’s list is updated, so you will always have the same view as the PI.
Subscribe to a PI’s “My Projects” list

1. Directly below the Effort Reporting System "banner" at the top of the page, click the Effort Report List drop down menu and select "Manage Saved Searches."

2. Click Subscribe in the bottom left corner.

3. Enter the Principal Investigator’s name or UID number

4. Click Update Filter.
Subscribe to a PI’s “My Projects” list

5. Click Subscribe

6. Click Close in upper right hand corner

7. You should be returned to the Managed Saved Searches screen, where you will see a listing for “My Projects” with the name of the PI you just specified.

Frequently Asked Questions (FAQs)
Access from off-campus

Q: I am unable to access the ERS system from home/off-campus. Why do I get an error message when I open my browser and enter the ERS website address like I normally do when I'm on campus?

A: Because ERS is a secured application accessible only through the UCLA network, you must first dial in through VPN if you’re off campus. Once you are dialed in through VPN, you become part of the UCLA network and can then access the ERS website as you normally would on campus. Please contact your departmental IT staff to set you up with VPN access if you do not already have it.

PI unable to view reports

Q: Dr. Smith is the PI on a grant (Fund 12345) and Dr. Jones has a project within that grant, Joe Bruin is a post-doc paid on Dr. Jones’ project FAU 155355-1-12345. However, Joe Bruin’s effort report is appearing under Dr. Smith’s “My Projects” list instead. How do I get Joe Bruin’s effort report to appear under Dr. Jones’ list, since he is the one that actually needs to certify the report?

A: There are several reasons why Joe Bruin’s report may not appear under Dr. Jones’ “My Projects” list. Most likely, it is because Dr. Jones has not been set up as the Managing Investigator for the FAU from which Joe Bruin is paid. The other possible reason may be that Dr. Jones’ cost center has not been correctly linked in the financial system. Contact the ERS Help Desk for assistance in determining the reason. Once a determination has been made, you will be advised of steps to take which may include setting up a Managing Investigator or contacting your EFM Fund Account to make the appropriate updates to the Financial System tables.

“Certified/AdjustReqd”? What does that mean?

Q: I certified a report but the status is showing “Certified/AdjustReqd.” What does that mean?

A: The effort report was certified (and the Payroll % was changed) but no transfer of expense was processed. Once the transfer of expense has been processed, the report status should automatically update to Certified. Action is only required if you haven’t already completed the necessary transactions/updates on PPS.

**For more information on the various report statuses, please refer to page 4 of the ERS Extras newsletter**
On-going Communication

• Essential part of a successful system implementation
• On-going effort that goes both ways
• Tell us what you would like to see or specific topics you would like covered in future communication
• Comments, suggestions, enhancement requests or questions are always welcome. Email us at ershelp@research.ucla.edu
• Stay tuned for more updates via the ERS mailing list!

Thank You!