ERS JOB AID FOR DSA

Key Items To Remember!

1. Please note that the users you create cannot ever be deleted in the system and their log-ins are permanent! So be careful when you are setting them up.
2. All log-ins must be in lowercase or users will not be able to access the system.
3. In an effort to be consistent with log-in we ask you to use the UCSB NetID (lowercase).
4. Keep in mind that the Coordinator and Certifier’s functions have access to payroll data in ERS. If an individual does not normally have access to payroll data in their job responsibilities, you may not want to grant them access with those roles.
5. The users will create their own passwords during their initial launch into the ERS system. You will just need to provide them with their user ID.
6. If you are setting up the role of Coordinator you will select “All Home Departments Coordinator” role. If you are setting up a certifier you will select “All Home Departments Certifier” role.

FAQ

Q. My user states that they are not able to access system. What do I do?
A. Step 1: Check to ensure the individual is set-up as a user
   Step2: If the individual is a user check to make certain their log-in is in all lowercase
   Step 3: Ask individual if they have set-up their password in ERS. Passwords are not automatically loaded and must be set-up by the individual users, for confidentiality reasons.

Q. Why is a PI not set up as a user in the system?
A. All PI’s are automatically loaded into the system as users. However, at the time of the load the PI may have been missing a UCSB NetID, employee ID, or email address. The system requires all these items in order to add them automatically. Therefore, you must add them manually.

Q. As DSA can I also set myself up as a certifier and coordinator?
A. Yes, if it is appropriate for you to have access to be a coordinator and certify effort reports (very rare) you may set yourself up with these roles. DSA’s that also have the role of coordinator is common in smaller departments.

Q. Who can have certifier access?
A. Anyone who has first hand knowledge of an employee’s effort on a federally funded project. It is very rare for a coordinator to have certifier access. Only in the event that a person in the coordinator role would have first hand knowledge of individuals effort on a federally funded project should they be allowed this role (very rare). Do not give a coordinator access to the certifier role if their intent is to certify a report on behalf of a PI. In addition, never give a PI’s log-in information to anyone other than the PI. There can be severe audit consequences if you do so.

Q. What if an employee retires or terminates employment how do I delete them?
A. You can never delete a user but you can make them “inactive” in the user table. Go to System Administration, View Users, and select user and toggle the “active” check box it will then note “inactive” next to the check box.

Q. I made a mistake in the employee login and used a capital letter. How do I delete it?
A. The user login is a permanent field and cannot be deleted. You must “inactivate” the user file which you made in error and create a new user file by selecting “add new user.

For a better understanding on what is effort reporting please go to the following link and select “Training on Effort Reporting- Principle Investigators”:
http://accounting.ucsb.edu/forms/?unit=Extramural%20Fund%20Management