How to access ERS and pre review an Effort form

Applicable Roles: DC, Sub DC, and Pre Reviewer

1. Accessing the ERS home page

   Go to https://ersweb.itcs.northwestern.edu/GenericERS and log onto ERS using your NetID and password. Contact the central administrator if you are a new departmental administrator (DC) and your role has not been assigned in ERS. The contact information is located on the home page.

   Note: the URL is case sensitive.

2. Logging on to ERS

   Once logged on, click the CERT tab on the left menu if CEM is the active tab. Click the Pending Pre Review link under STATUS/MY TO DO or select the Pre Review menu option to access the effort form.
3. Pre reviewing an Effort form

Starting with the 1Q2009 reporting period, PS Chart Strings are displayed instead of CUFs accounts on the Effort form. Prior to 1Q2009, CUFs accounts are displayed.

Review the payroll distribution and commitments. If Fund 191 and 192 have not been established and cost sharing is required, enter the cost shared amount or % in the Cost Sharing fields.

Click on “Input as %” or “Input as $” to toggle between $ and % mode. If a new PS chart string needs to be added to the Effort form, click on “Add Account”.

Add a PS chart string if it is not displayed on the Effort form.

Toggle between $ and % mode.

Click on any of the payroll links to see the payroll distribution details. The payroll drill-down will be displayed on a pop-up screen.
4. Payroll drill-down

PS chart string and its corresponding CUFs account (if available) will both be displayed on the account drill-down screen.

5. Adding a PS chart string or CUFs account to the Effort form

After clicking on “Add Account” on the Effort form, the following screen will be displayed. Enter the search criteria to search the filtered list. Starting 1Q2009, PS chart strings should be entered. Prior to 1Q2009, CUFs numbers should be used instead.

<table>
<thead>
<tr>
<th>Search Criteria</th>
<th>Starting 1Q2009</th>
<th>Prior to 1Q2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Criteria 1 (required)</td>
<td>PS Fund</td>
<td>CUFs Fund</td>
</tr>
<tr>
<td>Criteria 2 (required)</td>
<td>PS Dept Id</td>
<td>CUFs Area</td>
</tr>
<tr>
<td>Criteria 3 (optional)</td>
<td>PS Project ID</td>
<td>CUFs Org</td>
</tr>
</tbody>
</table>

Please input as much information as possible to narrow down the search. To perform a search, enter at least the first character for PS Fund (starting 1Q2009) / CUFs Fund (prior to 1Q2009) or PS Dept Id (starting 1Q2009) / CUFs Area (prior to 1Q2009) or PS Project Id (starting 1Q2009) / CUFs Org (prior to 1Q2009). The system will return first 1,000 records that match the criteria entered. The search is case-insensitive.
6. University (Non-sponsored) activities

The following screen will be displayed if there is any effort on non-sponsored accounts. Entering the % distribution is optional to the Pre Reviewer but mandatory to the Certifier. The Pre Reviewer can click on Proceed to continue without completing the following action.

The sum of non-sponsored (university activity) effort should be further distributed per the university activity. Enter the effort percentages among the seven university activities. The total effort should be the same as the sum of total non-sponsored (university activity) effort. Click the Proceed button when you are finished.
7. Pre-reviewed Effort form

The following form has been pre reviewed successfully. The time stamp and name of the pre reviewer are recorded. The form is now ready for certification. ERS will notify the certifier by sending an auto email. Click on Exit to go back to the name pick list.

8. Pre Review status update

The Pre Review Flag has been updated to “Y”. The effort form is now Pending Certification.