EFFORT REPORTING SYSTEM GLOSSARY

Assignment
Using the Assignment function (under CERT tab), pre-review, certification, and post-review responsibilities for employees' effort forms can be delegated (for pre or post, to administrative personnel; for certification, to the employee/himself OR to the employee's supervisor). Assignment can also be used to place employees into sub departments for internal management purposes, or to delegate management to other departments. Last, Assignment can be used to delegate management responsibilities for all employees in a specific sub department to a Sub Department Coordinator. Only Central Administrators (CA), Department Coordinators (DC), and Sub Department Coordinators (SubDC) have access to the Assignment Function. CA may perform all assignments for all departments; DC may perform all assignments (except faculty certifiers—only CAs can update) for all employees in his/her department (whether it is the employee's home department, or if the employee was reassigned there by her/his actual home department); SubDC may perform all assignments (except faculty certifier) for employees in the sub department(s) for which they are SubDC.

Central Administrator (CA)
Central Administrators oversee the Effort Reporting System (ERS), and assist administrators with day to day tasks related to effort reporting. CAs can view and run reports on all past and present effort forms (university wide) in ERS. Effort Reporting Coordinators are CAs, and can assist you with ERS questions and issues.

Certify
In ERS, a feature that allows certifiers (faculty and some administrative personnel) to attest to (certify) the effort of themselves and those they supervise (grad students, post docs, etc.). Certification is the task of confirming effort.

Certifier
Employees given the "CERT" role in ERS (faculty and some administrative personnel) attest to (certify) their own effort, and often the effort of employees they supervise (grad students, post docs, etc.). A certifier is a person responsible for completing the certification task.

Department
Organizational units within NU (such as academic departments, centers and clinical units) to which users are assigned. Numerical department designation is based on the NU HR 4-digit department code instead of the 7-digit NU Financials Department ID. Departments may be further subdivided into sub departments, with management responsibilities delegated to Sub Department Coordinators. Sub Department designation is based on the NU HR 6-digit sub department code.

Departmental Coordinator (DC)
Department Coordinators are responsible for overseeing the completion of effort forms for their departments. The DC may view and manage all effort forms assigned to her department, and has the ability to delegate (using "Assignments" function) Sub Department management (SubDC), Pre Review, and Post Review responsibilities to other personnel. Generally, the DC is the default Pre and Post Reviewer for the department over which he has authority (until he chooses to reassign these responsibilities). The DC can also change non-faculty certifier assignments. Even after assigning other personnel as SubDC, Pre Reviewer, and/or Post Reviewer, the DC can still view wall department effort forms, complete Pre and Post Review tasks, and change SubDC, pre reviewer, non-faculty certifier, and post reviewer assignments at any time (for all personnel assigned to her department, regardless of sub department assignments).
Domain
The departments and/or sub departments for which a Department Coordinator or Sub Department Coordinator can view and manage effort forms (ex: the domain of a DC for department 1234 includes 1234, sub department 123401, and subdepartment 123402; the domain for a SubDC assigned exclusively to 123401 is 123401 only).

Notification
Feature allowing ERS users to email other users directly from ERS. Some notifications are sent automatically by ERS (ex: when pre review is completed, ERS automatically sends a notification email to the certifier that the form is unlocked for review and certification).

Pre Review
Process in which an effort form is reviewed and adjusted by an administrator before it is released for certification. Pre Review represents the administrator's estimate of total effort devoted by the employee to each project/account. In pre review, missing accounts can be added, and estimated effort percentages (where different than payroll percentages) can be adjusted using cost share. Until Pre Review is complete, the Certifier does not have access to the effort form. Upon Pre Review completion, the Certifier is automatically notified by email from ERS that the form is ready for certification.

Pre Reviewer
The Pre Reviewer completes the pre review task for forms assigned to him by a CA, DC, or SubDC. A pre reviewer may be assigned specific employees' forms, or entire sub departments (if assigned prereview responsibility for a sub department, the pre reviewer must complete prereview for all employees assigned to the sub department). Initially, the Department Coordinator is set as the default Pre Reviewer.

Profile
Each employee with access to ERS has a Profile containing basic data pulled from myHR (including Employee ID, Name, Home Department, Division, Title, and default email address for ERS notifications). Only the email address may be updated within ERS (when logged in, users can click the "My Profile" tab to update email). When non-editable profile data is changed in myHR, the ERS Profile updates automatically.

Post Review
Post Review is only required if certified effort differs from pre reviewed effort; it reconciles the differences. Post Review provides an added layer of compliance by notifying department personnel when payroll journals are needed, and keeps administrators informed of true effort (to guide future payroll and project management). Until Certification is complete, the Post Reviewer does not have access to the effort form. Upon Certification completion, the Post Reviewer is automatically notified by email from ERS if Certification differs from Pre Review (in which case Post Review is required).

Post Reviewer
The Post Reviewer completes the post review task (when needed) for forms assigned to her by a CA, DC, or SubDC. A post reviewer may be assigned specific employees' forms, or entire sub departments (if assigned post review responsibility for a sub department, the post reviewer must complete post review for all employees assigned to the sub department). Initially, the Department Coordinator is set as the default Post Reviewer.

Sub Department
Organizational sub units within NU parent departments (ex: parent department is 1234, and includes sub departments 123401, 123402, and 123403). Sub Department designation is based on the NUHR 6-digit sub department code. Note: in a list of a department's sub departments, the parent department is also listed (parent department always ends in "00"—ex: parent department 1234 would appear in a list of sub departments as 123400). See also "Alternate Sub Department."
Sub Departmental Coordinator (Sub DC)
Sub Department Coordinators are responsible for overseeing the completion of effort forms for the sub departments to which they are assigned by a DC. The Sub DC may view and manage all effort forms assigned to her sub department(s), and usually has the ability to delegate (using "Assignments" function) Pre Review and Post Review responsibilities to other personnel (however, the DC may remove Sub DC Assignment privileges if desired). Generally, the Sub DC is the default Pre and Post Reviewer for the subdepartment(s) over which he has authority (until he chooses to reassign these responsibilities). If given Assignment abilities by the DC, the Sub DC can also change non-faculty certifier assignments for personnel assigned to her sub department(s). Even after assigning other personnel as Pre Reviewer and/or Post Reviewer, the Sub DC can still view all effort forms in her assigned sub department(s), complete Pre and Post Review tasks, and change subdepartment(s’) pre reviewer, non-faculty certifier, and post reviewer assignments at any time (if given Assignment privileges by DC).