

TRAINING GUIDE FOR SECURITY ADMINISTRATORS

TOPIC	PAGE
System Administration Overview	1
Roles available in ECERT	1
Assign roles to users	2
Submit requests to central office	5

For assistance with this training documentation, please send an email to ECERTHELPDESK@UCSD.EDU.

System Administration Overview

The Administration Task page functions as a portal to the various system administration pages on which you may perform administrative tasks related to ECERT.

Administrative Tasks related to ECERT are divided into two categories: *Central Administration Tasks* and *Departmental Administration Tasks*.

- *Central Administrative* tasks include management of the organizational hierarchy and security administration, permissions and roles, schedule definition, and operational tasks for monitoring ECERT.
- *Departmental Administrative* tasks include administering users, and special report generation options.

Roles Available in ECERT

A list of defined roles is available in ECERT. You can assign those roles to new users as appropriate within your department.

Table 1: List of Predefined Roles in ECERT

Predefined Roles	Permissions	Who is likely to have these roles?
Coordinator Access	View effort reports, edit effort reports, access payroll info	Business Managers, Fund Managers, HR Coordinators
Read Only Access	View effort reports, view payroll info	Central Office, Deans
Compliance Report Generator	Generate Compliance Reports	Central Office, Deans, Coordinators
Report Generator	Generate ad-hoc effort reports	Fund Managers, Business Managers
PI	View effort reports, edit effort reports, view payroll info, certify effort reports	PIs
Self-certifier	View effort reports, edit effort reports, view payroll info, certify effort reports	PIs, Researchers

All the roles except PI and Self-certifier can be assigned to users. One person can have more than one role if required. You will have authority to setup Preparer Access and Read Only Access.

For Preparer Access, you will assign users with the following roles:

- Coordinator Access
- Compliance Report Generator
- Report Generator

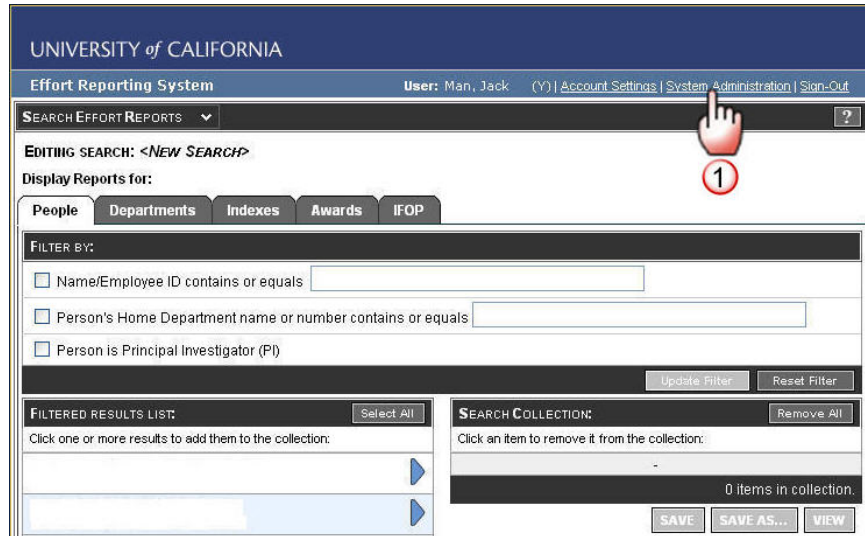
For Read Only Access, you will assign users with the following roles:

- Read Only Access
- Compliance Report Generator

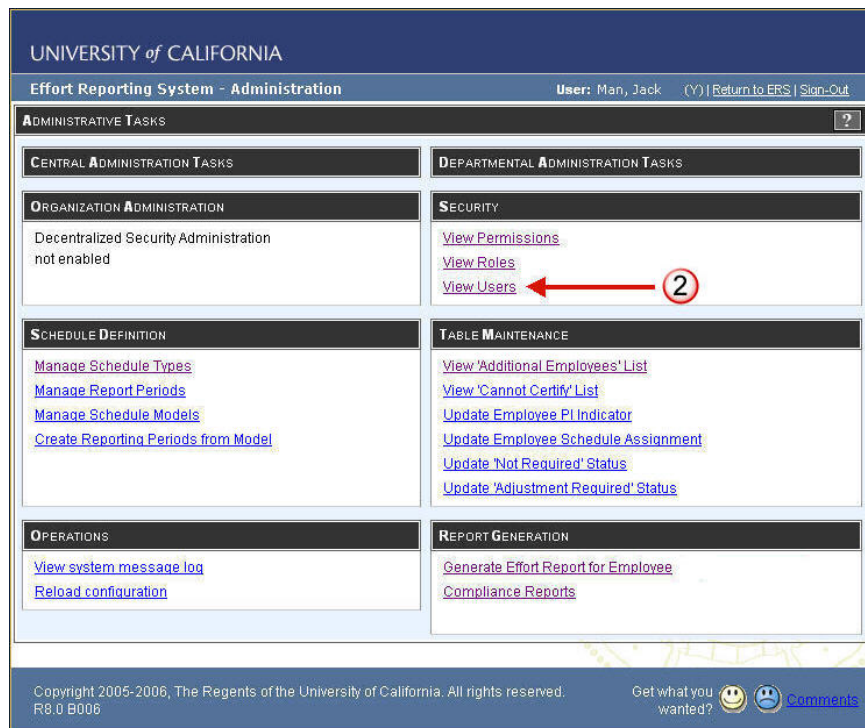
Assign roles to users

Follow these steps to assign roles to users:

1. Access ECERT at <http://myEffort.ucsd.edu> and then click on the System Administration link located at the top right of the page.



2. Click on the View Users link under Security category from the System Administration homepage.



- Search for the employee by name or employee ID, then select the desired user from the list by clicking on the employee's name.

UNIVERSITY of CALIFORNIA
Effort Reporting System - Administration User: Man, Jack (Y) | Return to ERS | Sign-Out

Return to Administration

VIEW USERS ?

Enter Name:Employee ID **3A** or Login View All Users

USER LIST Add New User

Employee ID	ERS User	Login	E-Mail	Status
000123456	Cat, Fishe			Active
000000789	Olde, Salt			Active
				Inactive

Display 20 users per page displaying 1 to 3 (3 total)

Copyright 2005-2006, The Regents of the University of California. All rights reserved. R8.0 B006 Get what you wanted? Comments

- Click on the Edit User button.

UNIVERSITY of CALIFORNIA
Effort Reporting System - Administration User: Man, Jack (Y) | Return to ERS | Sign-Out

Return to Administration

VIEW USER ?

USER: Cat, Fishe (000123456) Edit User Add New User

Role Name	Status	Notify	Activate	Add By

4

First Name: Fishe
Last Name: Cat
Employee ID: 000123456
User Login:
E-Mail: fcat@ucsd.edu
Active Indicator: Active
Date Last Changed: Jun 9, 2007 7:40 PM
Changed By: *System*
Date Added: Jun 9, 2007 7:40 PM
Added By: *System*

Return to List

Copyright 2005-2006, The Regents of the University of California. All rights reserved. R8.0 B006 Get what you wanted? Comments

Note: Do not click on the Add New User button. If you cannot locate the desired employee from the list, contact ecerthelpdesk@ucsd.edu.

- Select the desired role from the dropdown menu, and then click on the Add Role button to add it to a user record. Repeat this step until you have added the roles the user will need.

UNIVERSITY of CALIFORNIA
Effort Reporting System - Administration
User: Man, Jack (Y) | Return to ERS | Sign-Out
Return to Administration

Edit User ?

User: Cat, Fische (000123456)

First Name: Fische
Last Name: Cat
Employee ID: 000123456
User Login:
E-Mail:
Active Indicator: Active
Date Last Changed: Jun 9, 2007 7:40 PM
Changed By: *System*
Date Added: Jun 9, 2007 7:40 PM
Added By: *System*

Cancel Submit

Copyright 2005-2006, The Regents of the University of California. All rights reserved. R8.0 B006
Get what you wanted? Comments

- Click on the checkbox under Notify for the role of Coordinator Access, the status will change from "No" to "Yes" and the preparer will receive a notification when new reports were produced.

UNIVERSITY of CALIFORNIA
Effort Reporting System - Administration
User: Man, Jack (Y) | Return to ERS | Sign-Out
Return to Administration

Edit User ?

User: Cat, Fische (000123456)

First Name: Fische
Last Name: Cat
Employee ID: 000123456
User Login:
E-Mail: fcat@ucsd.edu
Active Indicator: Active
Date Last Changed: Jun 9, 2007 7:40 PM
Changed By: *System*
Date Added: Jun 9, 2007 7:40 PM
Added By: *System*

Cancel Submit

Role Name	Status	Notify	Add Date	Add By	Remove?
COORDINATOR ACCESS	<input checked="" type="checkbox"/> Active	<input checked="" type="checkbox"/> Yes	12/6/06 2:38 PM		REMOVE Role
Compliance Report Generator	<input checked="" type="checkbox"/> Active	<input type="checkbox"/> No	4/26/07 8:34 PM		REMOVE Role
Report Generator	<input checked="" type="checkbox"/> Active	<input type="checkbox"/> No	11/29/06 11:53 AM		REMOVE Role

Copyright 2005-2006, The Regents of the University of California. All rights reserved. R8.0 B006
Get what you wanted? Comments

7. Click Submit to finish, or remove the role if you added it by mistake.

UNIVERSITY of CALIFORNIA

Effort Reporting System - Administration User: Man, Jack (Y) | Return to FRS | Sign-Out

[Return to Administration](#)

EDIT USER

USER: Cat, Fische (000123456)

COORDINATOR ACCESS Add Role

First Name: Fische

Last Name: Cat

Employee ID: 000123456

User Login:

E-Mail: fcat@ucsd.edu

Active Indicator: Active

Date Last Changed: Jun 9, 2007 7:40 PM

Changed By: *System*

Date Added: Jun 9, 2007 7:40 PM

Added By: *System*

Role Name	Status	Notify	Add Date	Add By	Remove?
COORDINATOR ACCESS	<input checked="" type="checkbox"/> Active	<input type="checkbox"/> No	12/6/06 2:38 PM		REMOVE Role
Compliance Report Generator	<input checked="" type="checkbox"/> Active	<input type="checkbox"/> No	4/26/07 8:34 PM		REMOVE Role
Report Generator	<input checked="" type="checkbox"/> Active	<input type="checkbox"/> No	11/29/06 11:53 AM		REMOVE Role

Cancel Submit

Copyright 2005-2006, The Regents of the University of California. All rights reserved. R8.0 B006

Get what you wanted? 😊 😞 [Comments](#)

Submit requests to central office

Should any of the following issues raised, submit a request to ECERTHELPDESK@ucsd.edu with specific request in the subject line:

- Create a special permission and roles for an exceptional situation
- Add additional employees to the database
- Edit the "Cannot Certify" list
- Update the employee PI indicator
- Update effort report statuses