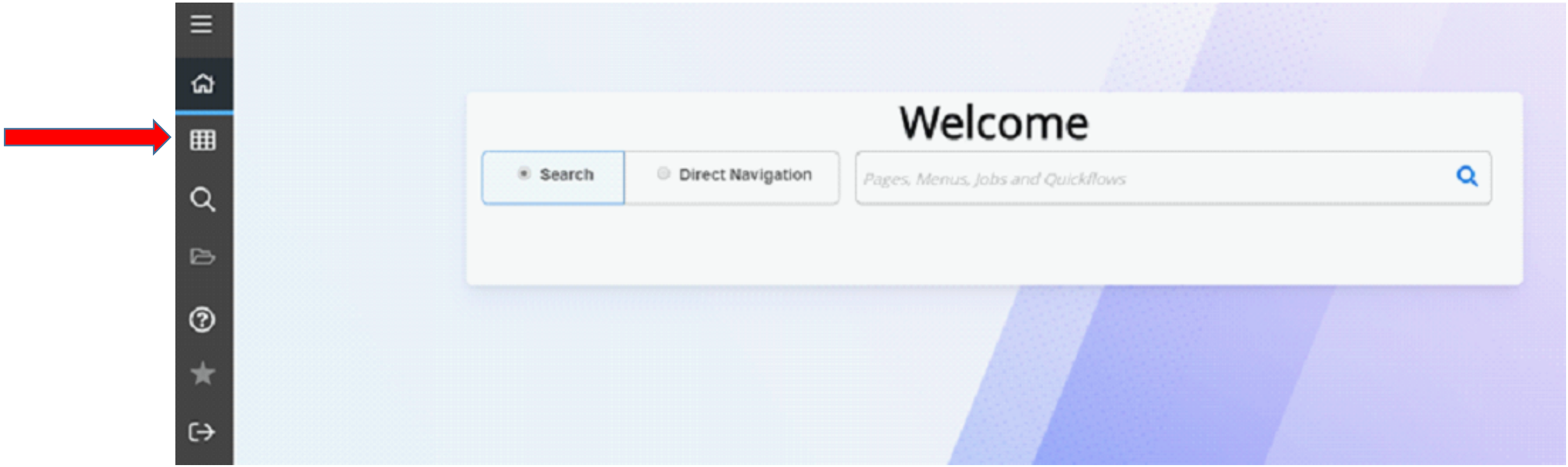
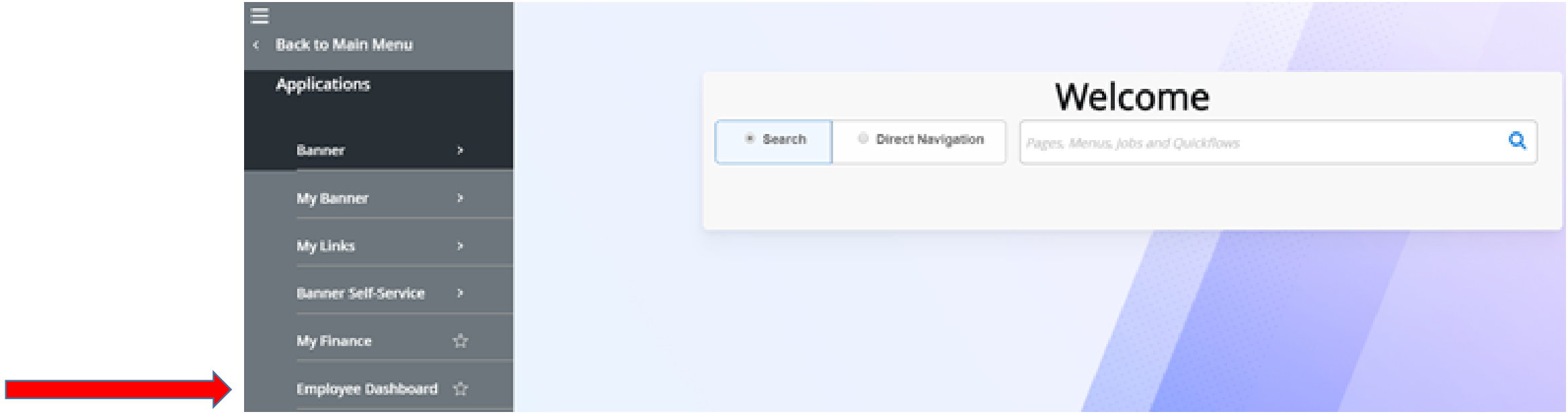
Effort Reporting System (ERS) – Banner 9

Welcome!! Select the box made up of 9 smaller squares – 3rd from the top on the left



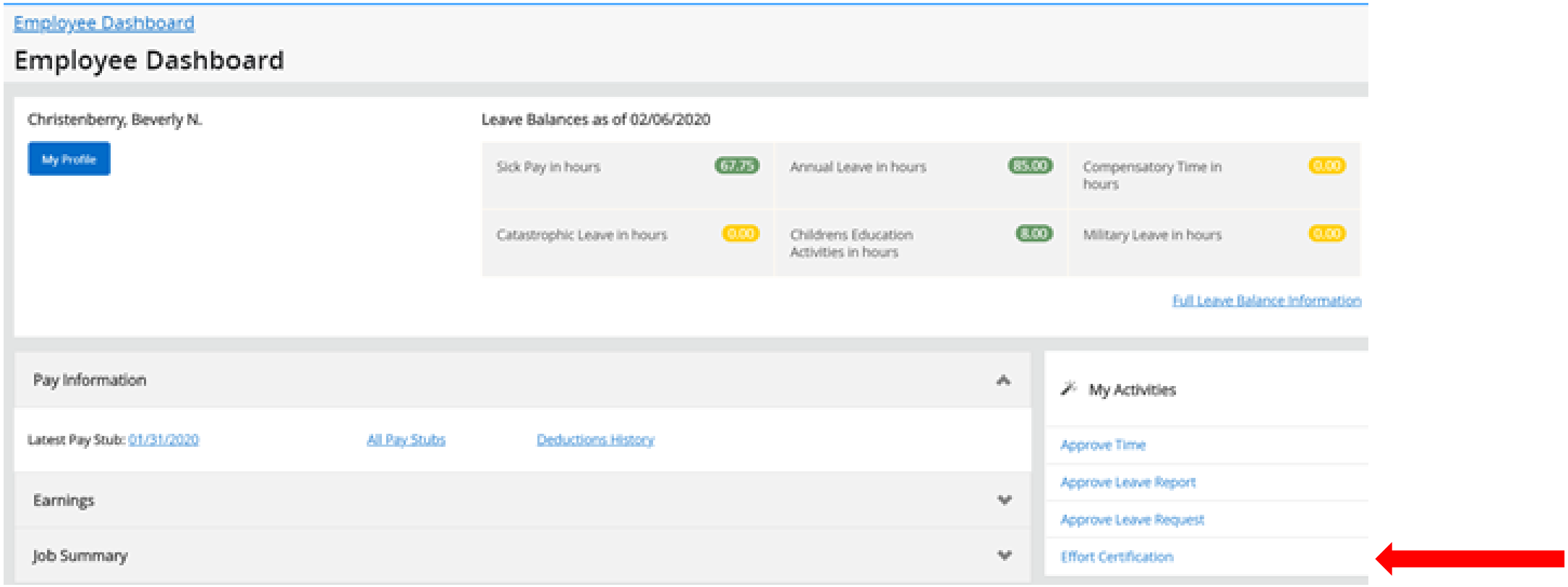
Effort Reporting System (ERS) – Banner 9

Click – Banner 9 Employee Dashboard



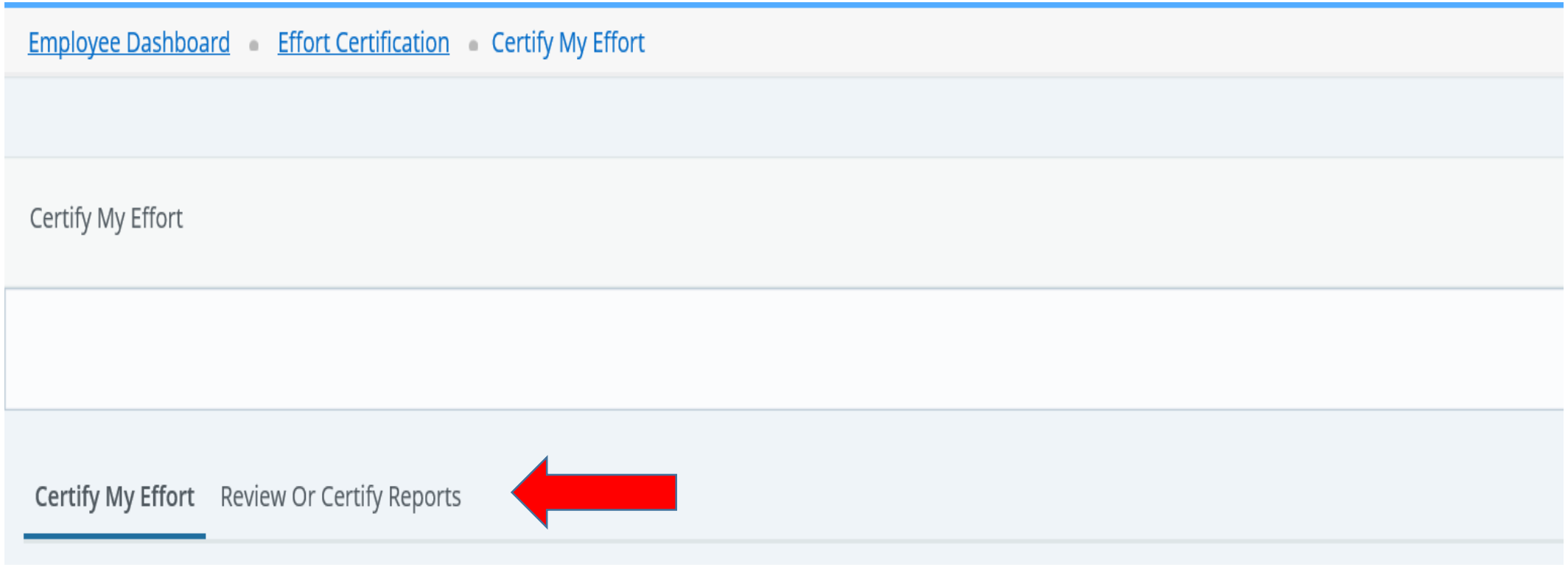
Effort Reporting System (ERS) – Banner 9

Click – Effort Certification on right side of screen



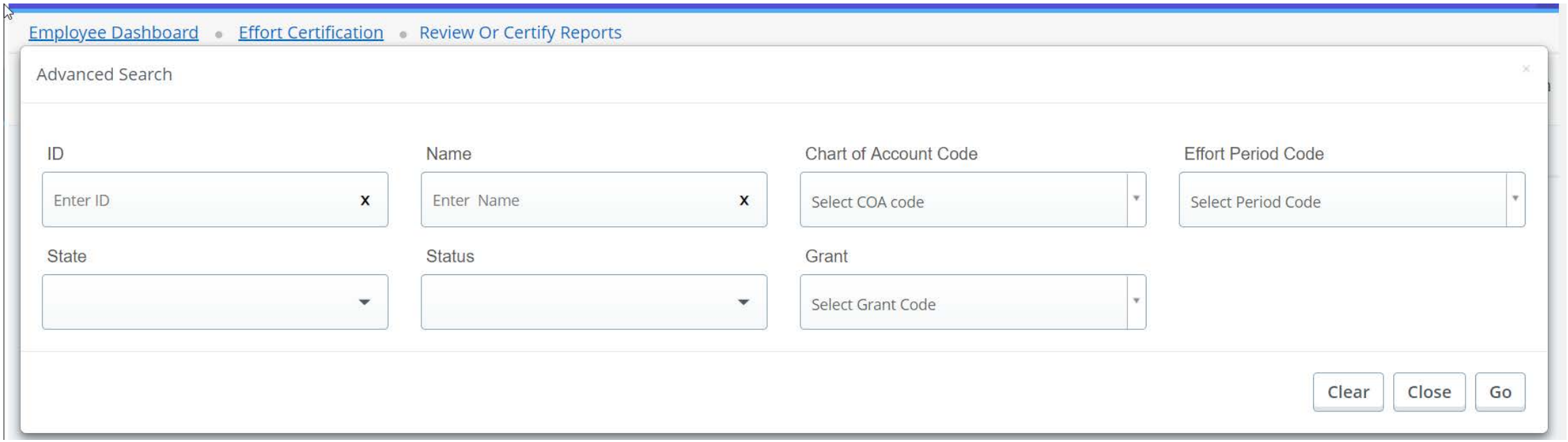
Effort Reporting System (ERS) – Banner 9

Click – Review or Certify Reports



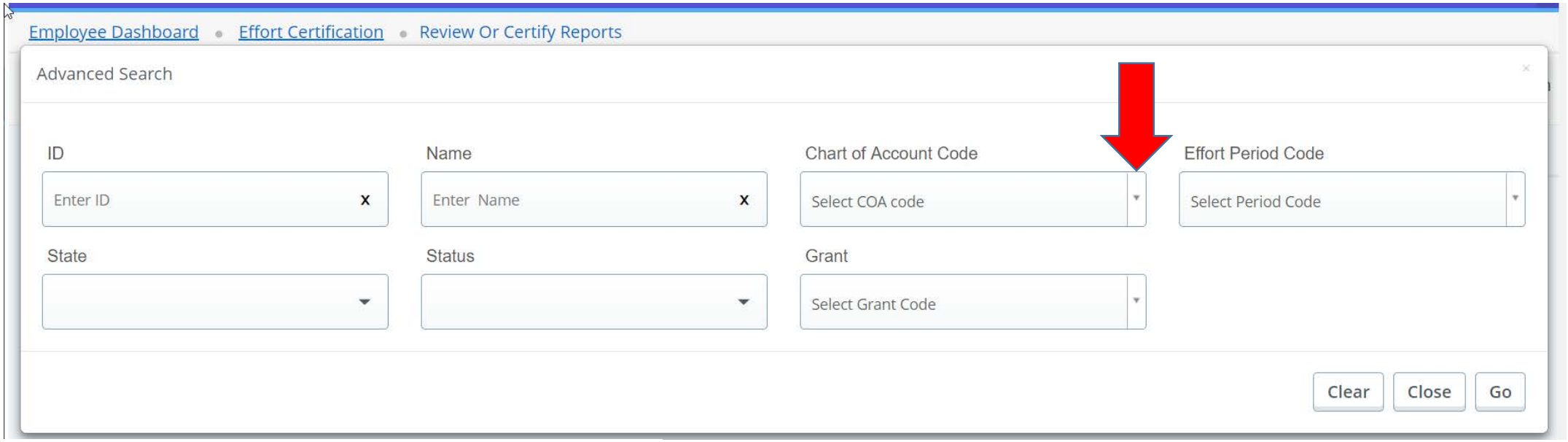
Effort Reporting System (ERS) – Banner 9

The Advanced Search box will automatically pop-up.



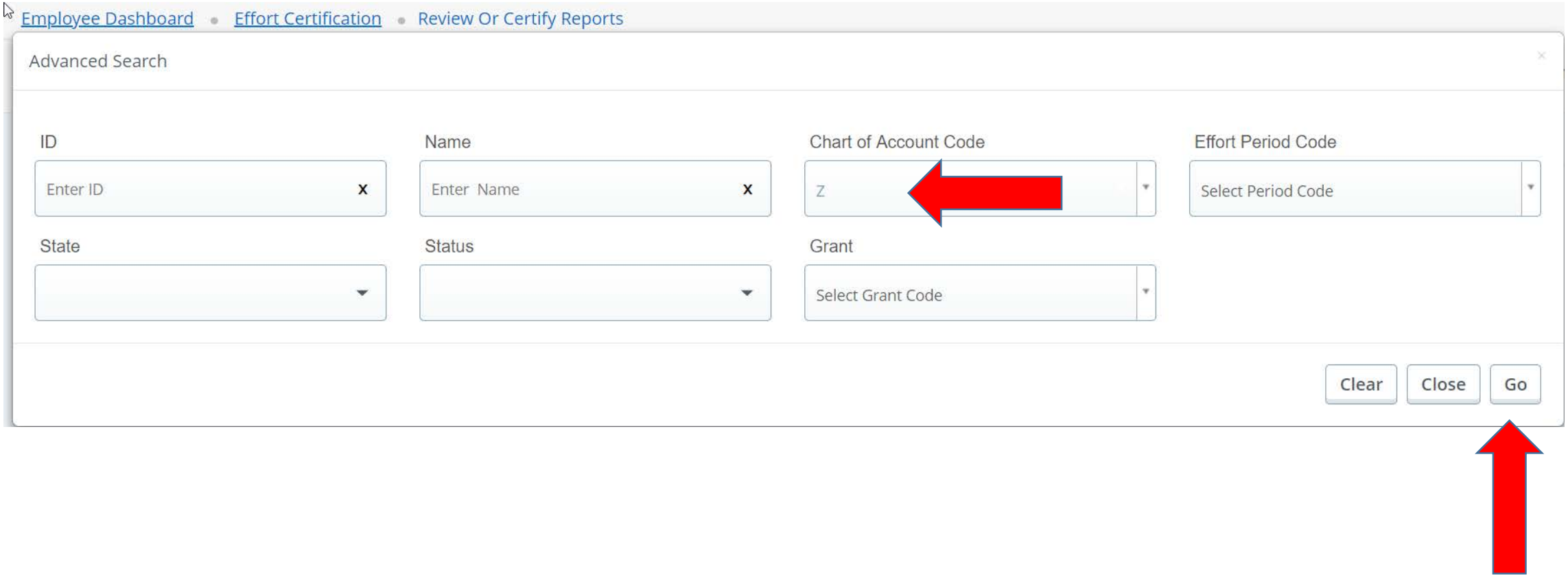
Effort Reporting System (ERS) – Banner 9

In order to move forward from this point – the Chart of Account Code **must** be entered. Click on the arrow to the right of the 'Select COA code', then click on Z,COOP.



Effort Reporting System (ERS) – Banner 9

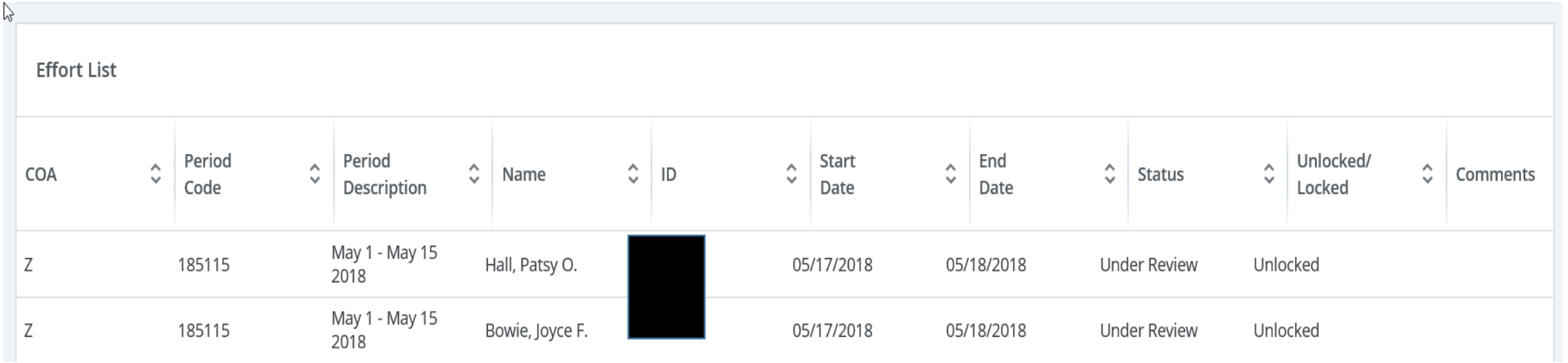
The screen will have the required “Z” in Chart of Account Code, so you can now click on the Go button.



Effort Reporting System (ERS) – Banner 9

The list of records requiring Post Review by you will appear as it did previously (this sample list has two records for training purposes only)

Double click to select record to open for Post Review.



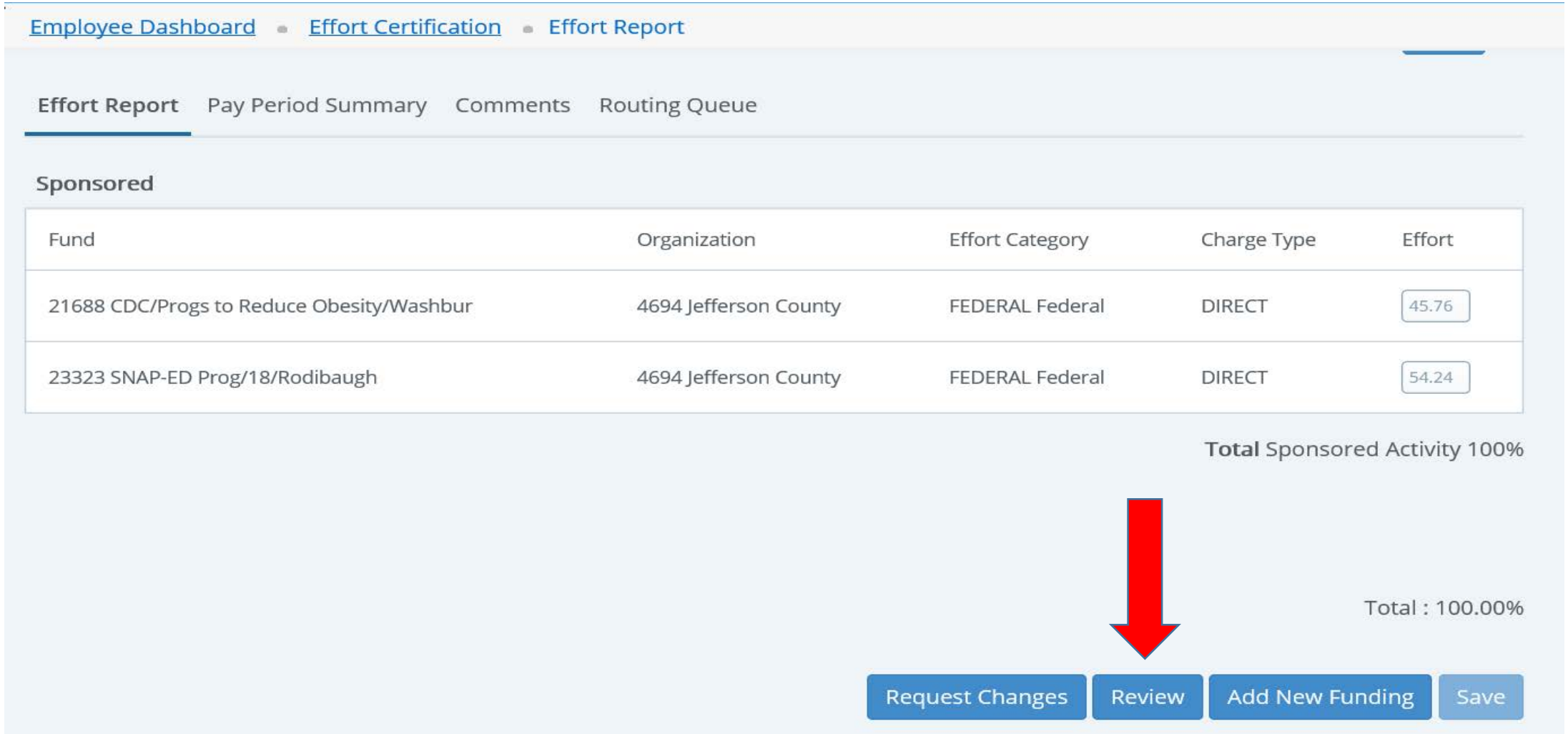
Effort List

COA	Period Code	Period Description	Name	ID	Start Date	End Date	Status	Unlocked/ Locked	Comments
Z	185115	May 1 - May 15 2018	Hall, Patsy O.	[redacted]	05/17/2018	05/18/2018	Under Review	Unlocked	
Z	185115	May 1 - May 15 2018	Bowie, Joyce F.		05/17/2018	05/18/2018	Under Review	Unlocked	

Effort Reporting System (ERS) – Banner 9

Record opens for your review.

If accurate as shown, click the “Review” button at bottom of screen.

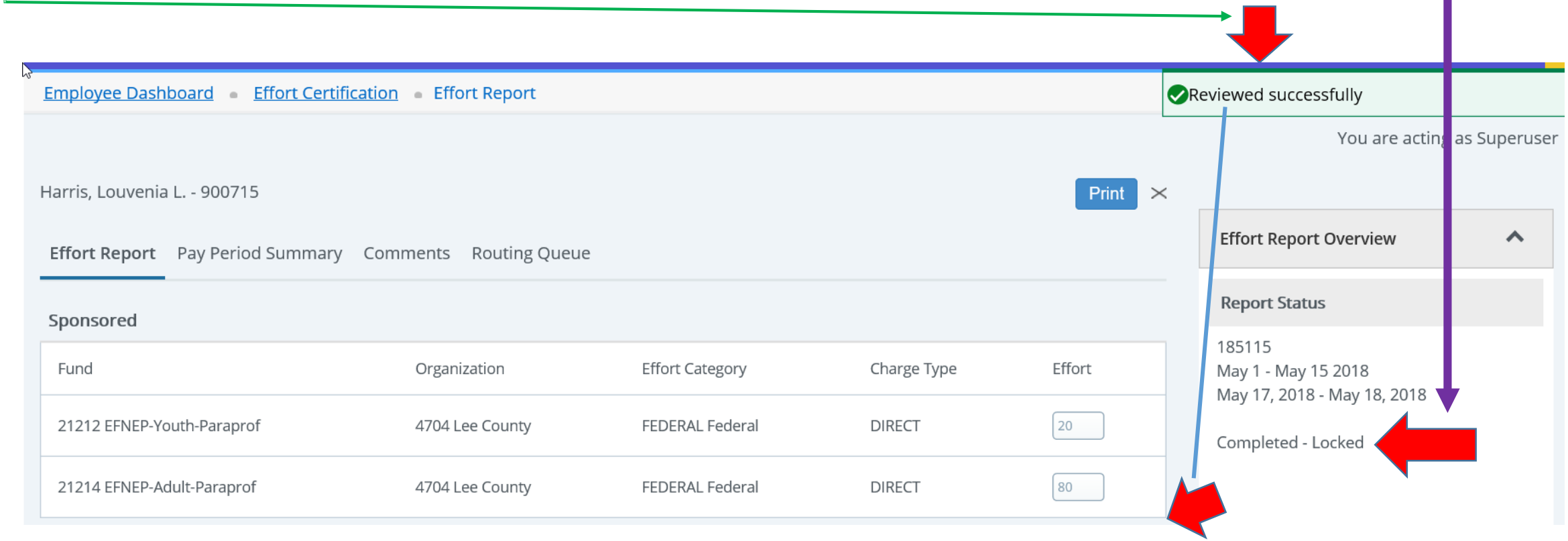


Effort Reporting System (ERS) – Banner 9

You have completed Review!

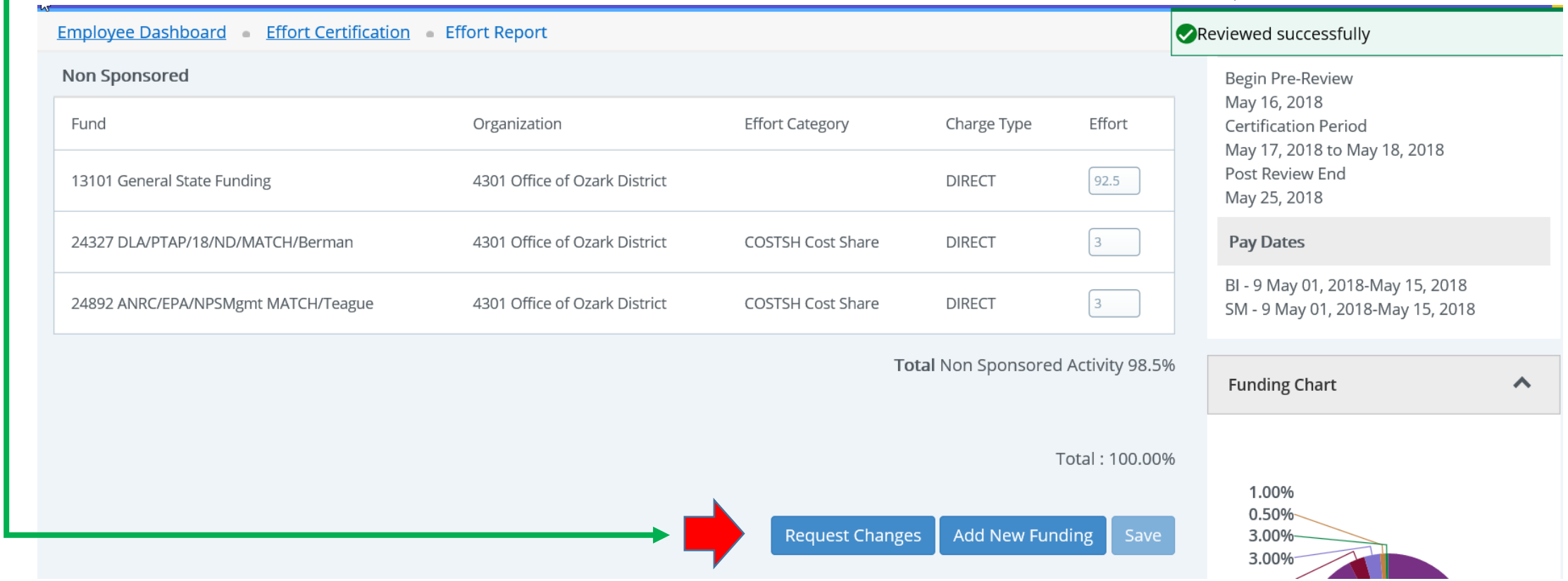
You should see this message and there are no selection buttons at the bottom of the screen.

Notice the Report Status is “Completed – Locked” IF you are the only Post Reviewer.



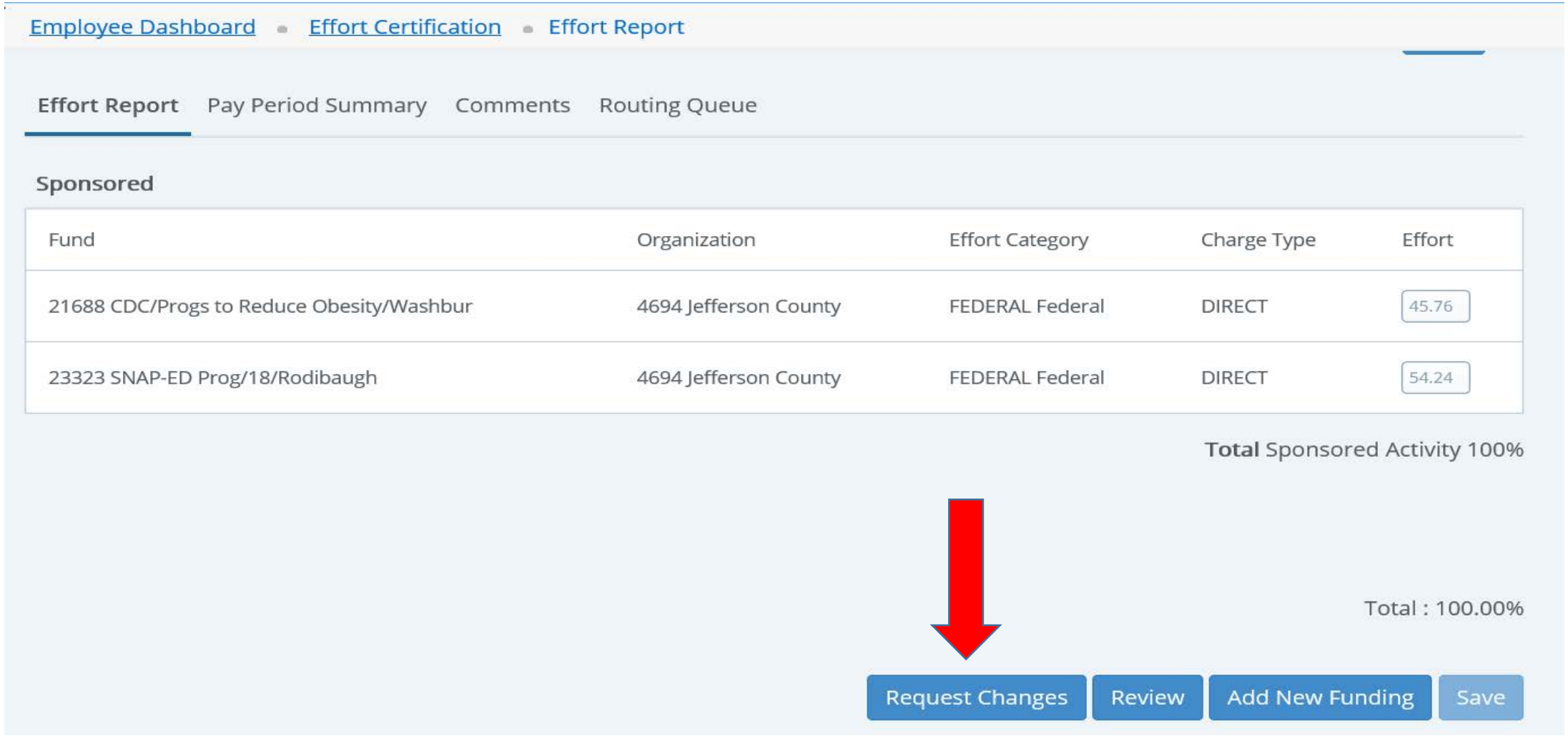
Effort Reporting System (ERS) – Banner 9

When there are other PI's that need to Post Review, you will still see this message and the selection buttons at the bottom of the screen will no longer show "Review".



Effort Reporting System (ERS) – Banner 9

If changes are needed, click the “Request Changes” button at bottom of screen.

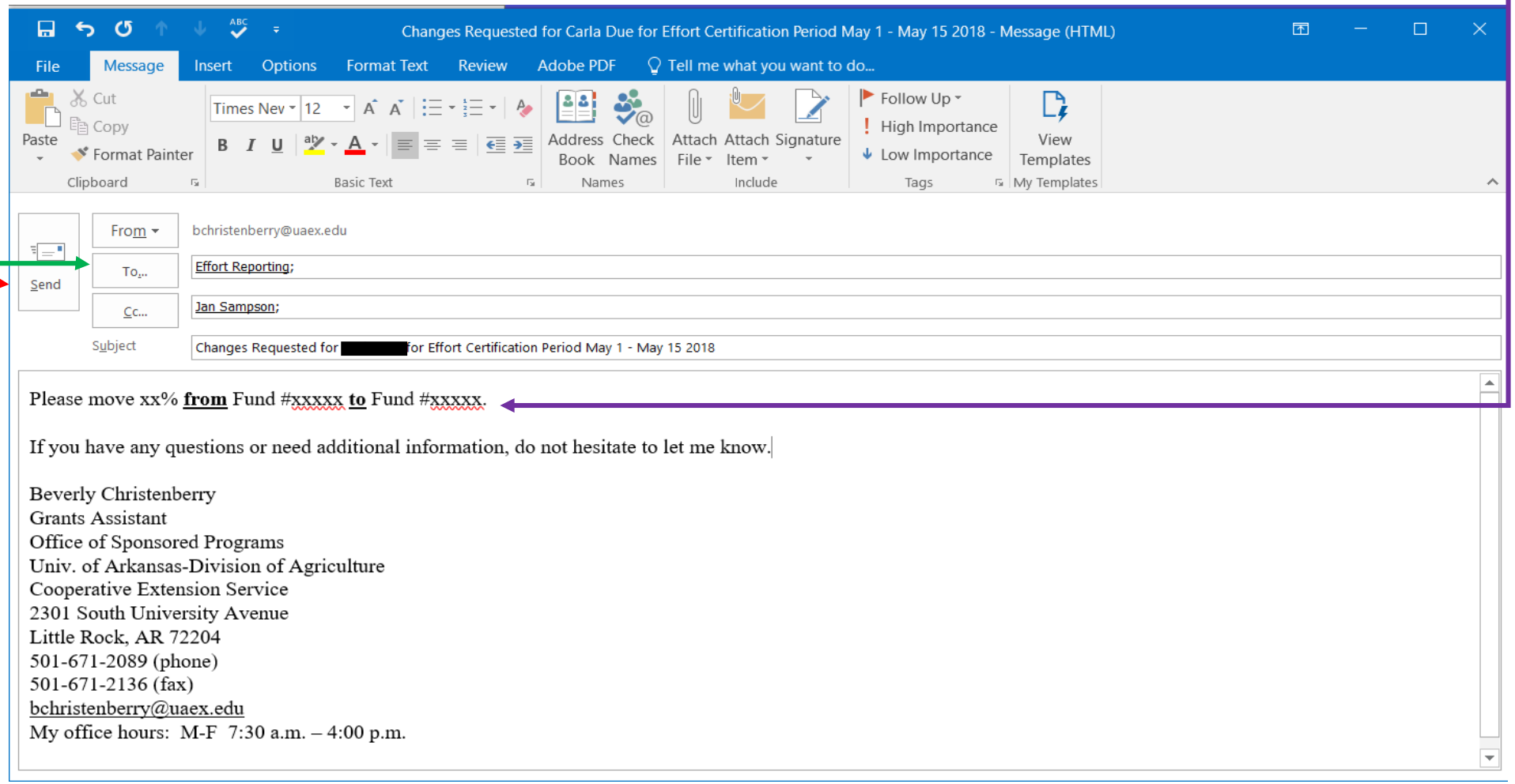


Effort Reporting System (ERS) – Banner 9

Enter **Effort_Reporting** in 'To...' and state the changes to be made. (NOTE: Be sure to include "From" and "To" Fund information – see example email below.)

CC: Admin. Assistant responsible for EHIRE changes for your department/county.

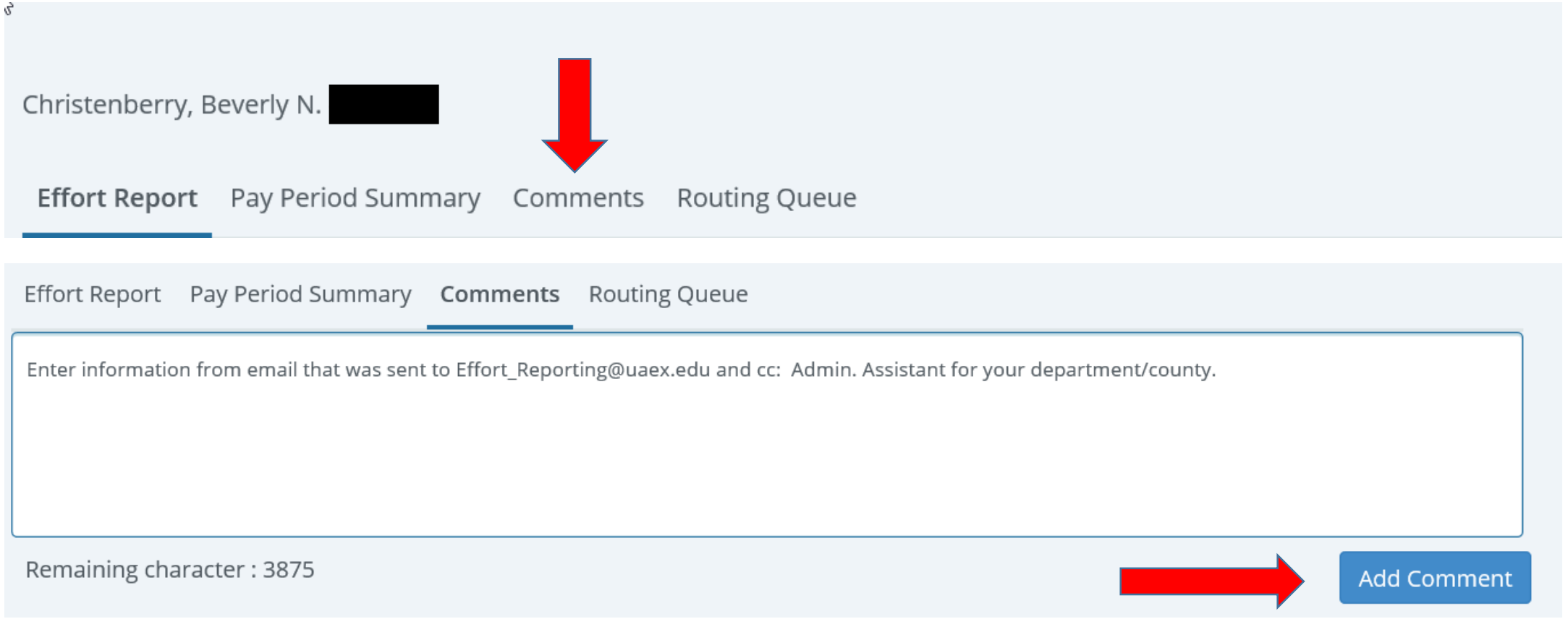
YOU MUST CLICK ON "SEND".



Effort Reporting System (ERS) – Banner 9

When changes are requested – **COMMENT(S) ON EFFORT RECORD ARE REQUIRED!!**

Click on Comments, enter requested change information in box provided and ***be sure*** to click 'Add Comment'.

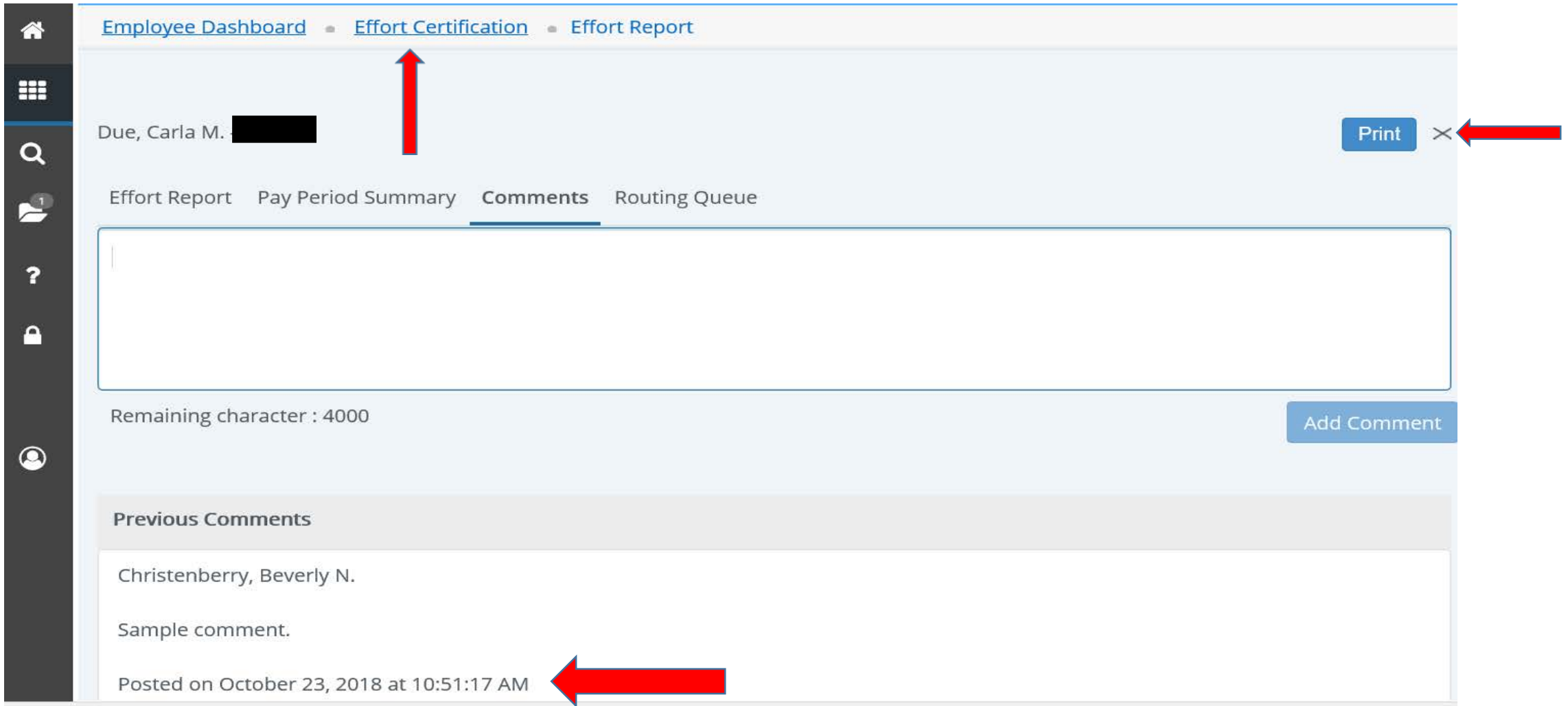


Effort Reporting System (ERS) – Banner 9

This is a screen shot after a comment has been entered. Notice, the system marks the Posted Date AND time.

Return to your record or list by clicking 'Effort Certification' at the top of your screen or the X by Print on right side of screen.

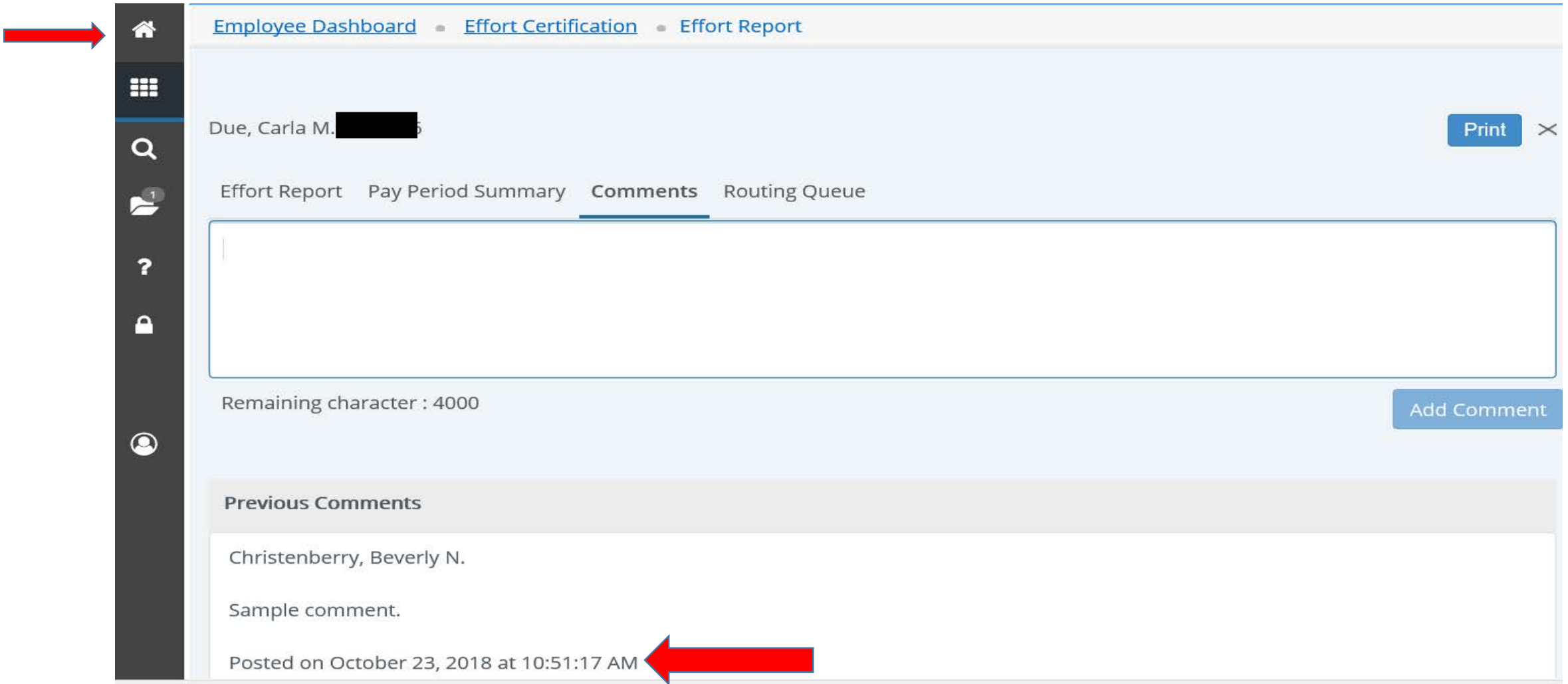
To **Exit**, select "Employee Dashboard" OR "Home".



Effort Reporting System (ERS) – Banner 9

If there were no changes required and you selected “Review” – **Review of this effort record is complete.** ☺

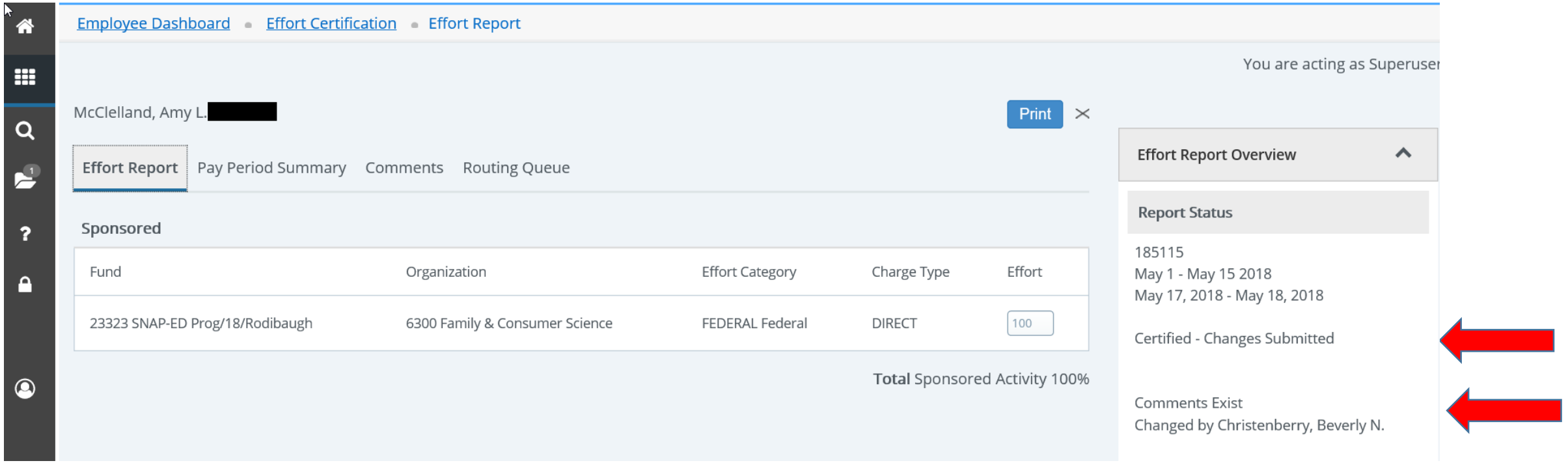
Return to your list by clicking ‘Effort Certification’ at the top of your screen. To Exit, select “Employee Dashboard” OR “Home”.

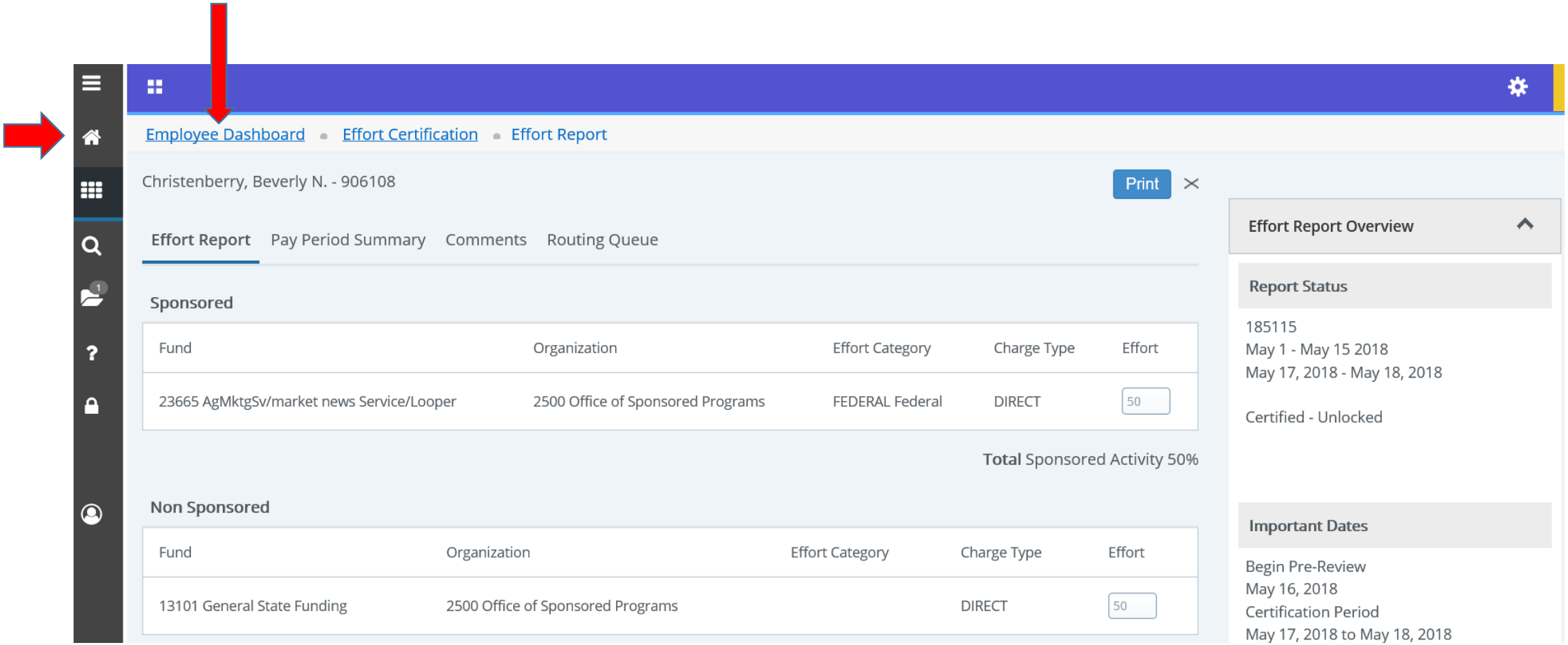


Effort Reporting System (ERS) – Banner 9

If changes were correctly requested, there is nothing else for you to do *at this time.* You should see the Report Status AND confirmation that *Comments Exist* as shown by red arrows below.

After changes have been completed, you will be notified via email that you need to review and certify the effort record – if it is correct.



Effort Reporting System (ERS) – Banner 9

EXIT by clicking on "Employee Dashboard" OR "Home"