# Welcome to Effort Reporting System (*ERS*)

**Assignments for DC's - Part 1** 

(managing default department roles)

University of Pennsylvania | Office of Research Services

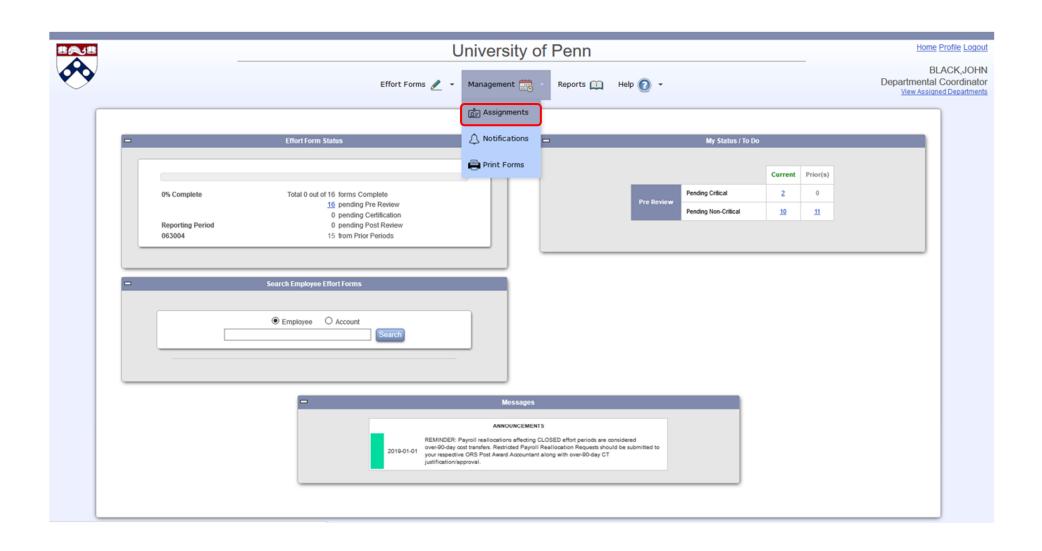
## Change Assignments for Department or Sub Departments

Departmental Coordinators (DC) are responsible for managing departmental role assignments for the Effort Reporting System (ERS).

This section of the Assignment module covers Changing Assignments for Departments and Sub Departments.

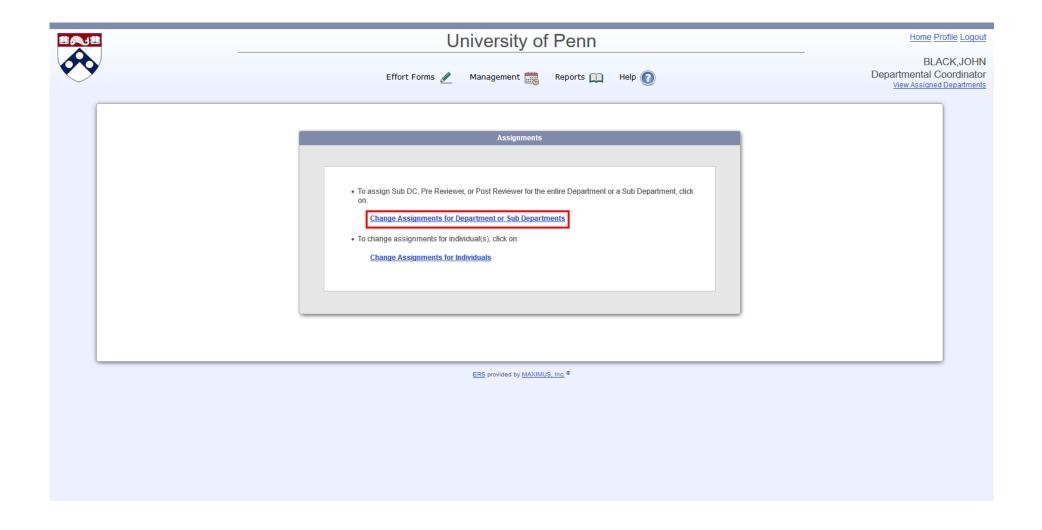
### **Assignments Function**

Assignments can be updated by either the DC or the Sub DC. To begin, select Assignments from the Management option menu.



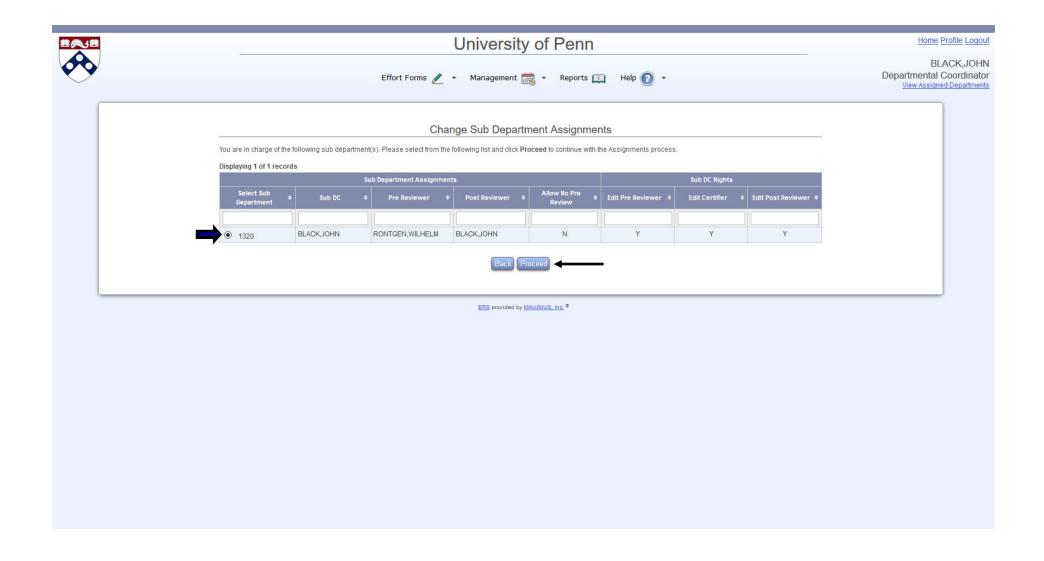
### **Assignments**

Next, select "Change Assignments for Departments or Sub Departments" or to manage <u>default</u> department role assignments: Sub Department Coordinator & Pre Reviewer.



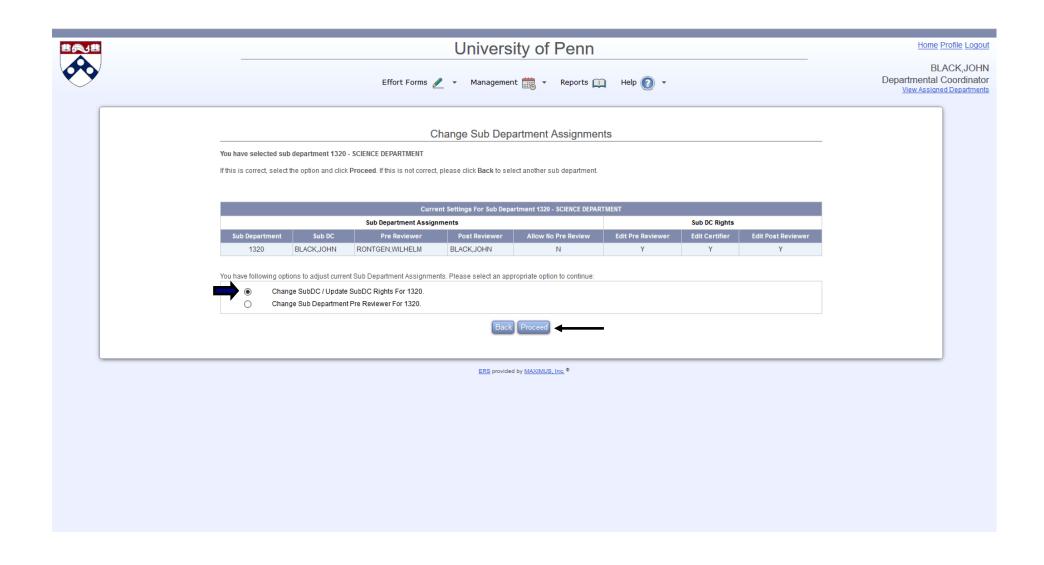
## Changing Assignments for Department and Sub Departments

List of your Sub Departments and their respective Sub DC, Pre Reviewer, and Post Reviewer default role assignment is displayed. To update any of these select the checkbox next to the desired Sub Department. Click "Proceed" to continue.



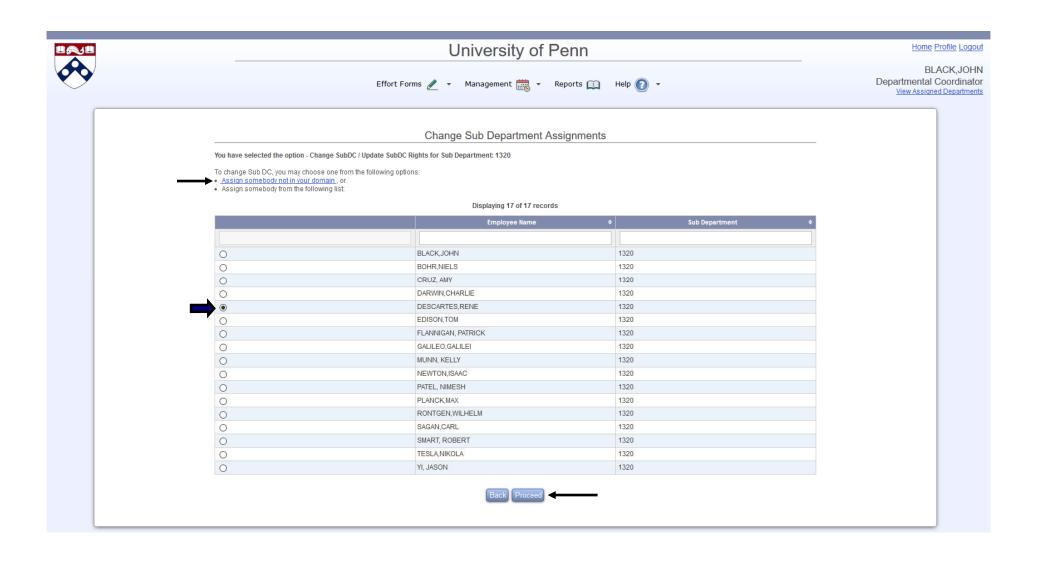
## Changing Assignments for Department and Sub Departments (cont.)

By selecting the "Change Sub DC/Update Sub DC Rights" option, the Department Coordinator can change the individual assigned as the Sub DC. Select checkbox and click "Proceed" to continue.



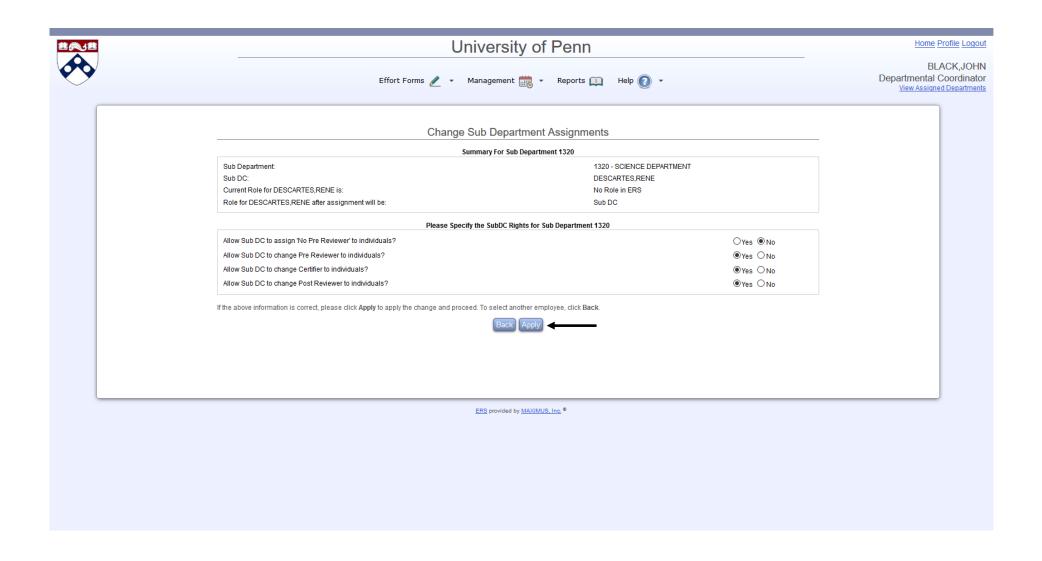
#### Changing Sub DC or Updating Sub DC rights (cont.)

You may select a person from the displayed list, which consists of everyone in their domain, or you may search for another individual by selecting the "Assign somebody not in your domain" link at the top of the page. Select a person to be the new Sub DC and click the "Proceed" button.



#### Changing Sub DC or Updating Sub DC rights (cont.)

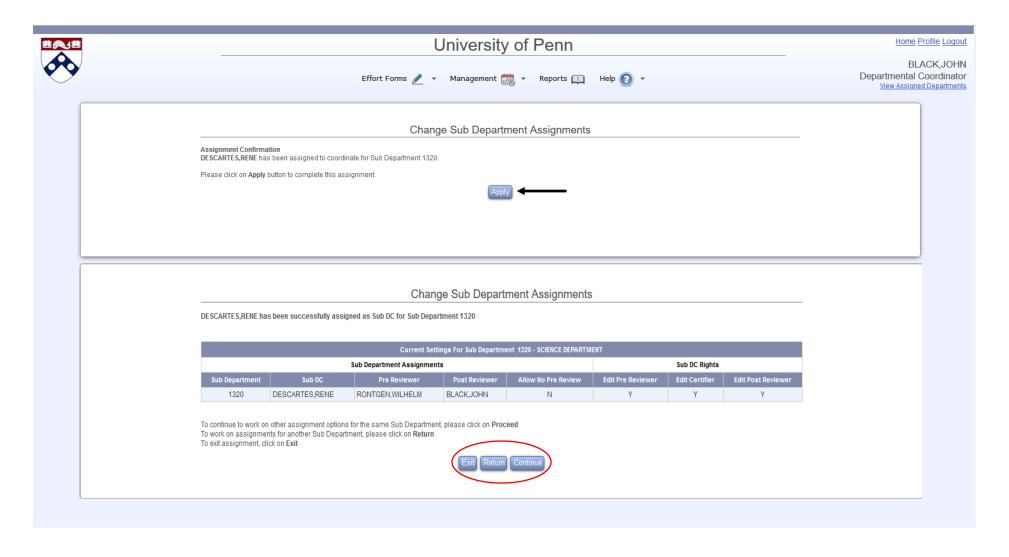
Once the user designates an individual to be the Sub DC, they will be directed to set the Sub DC Rights for the selected individual. Click "Apply" without changing the settings.



#### Changing Sub DC or Updating Sub DC rights (cont.)

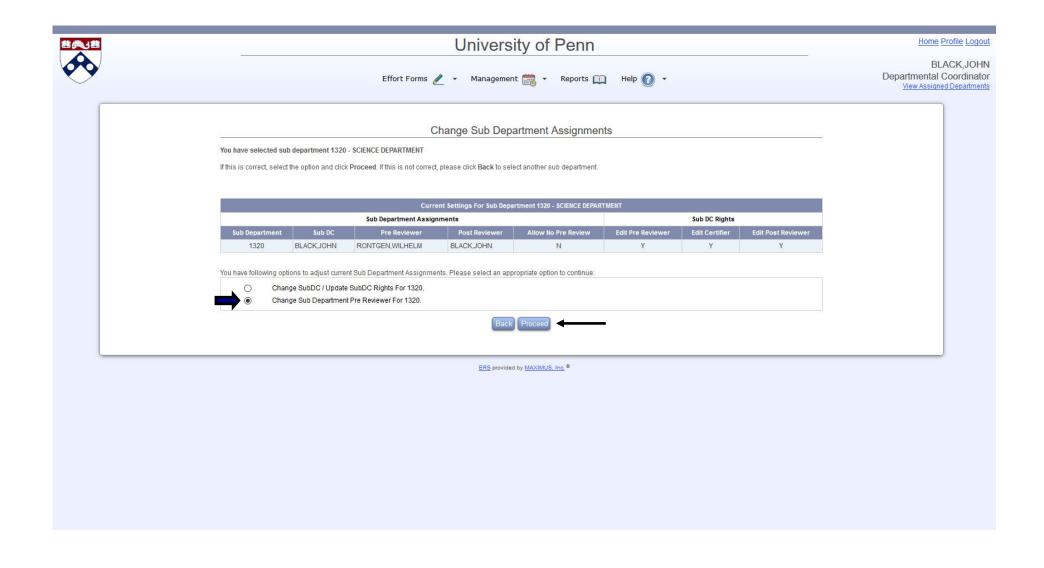
Next, click "Apply" to complete the assignment.

A summary of the current Sub Department assignments is displayed. To continue managing assignments for the selected Sub Department, select **Continue** or select **Exit** to work on different tasks.



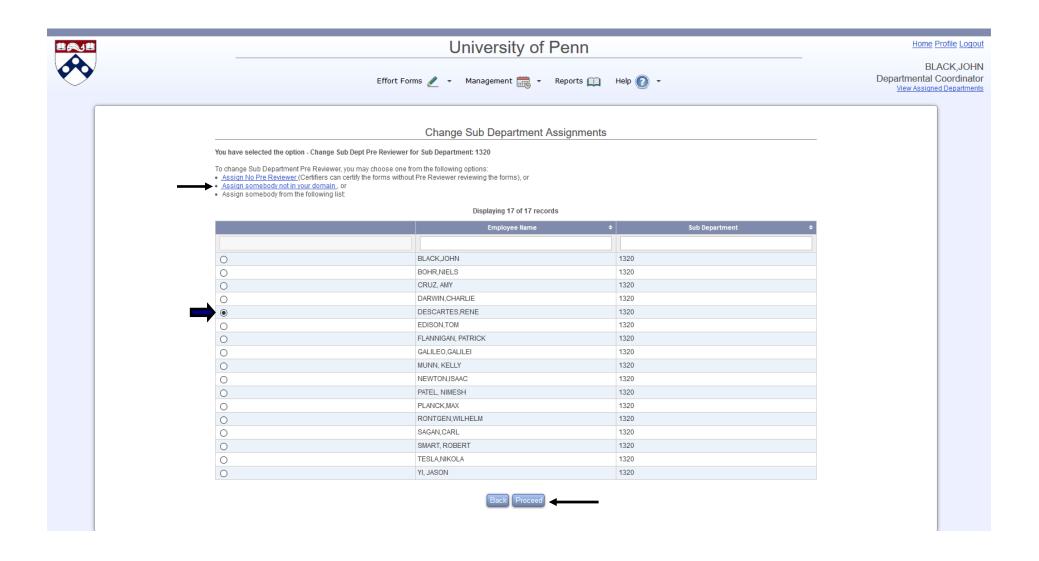
### Change Sub Department Pre Reviewer

In a selected Sub Department, instead of changing the SubDC, you may change the default Pre Reviewer by selecting the "Change Sub Department Pre Reviewer" option. Select "Proceed" to continue with the assignment change.



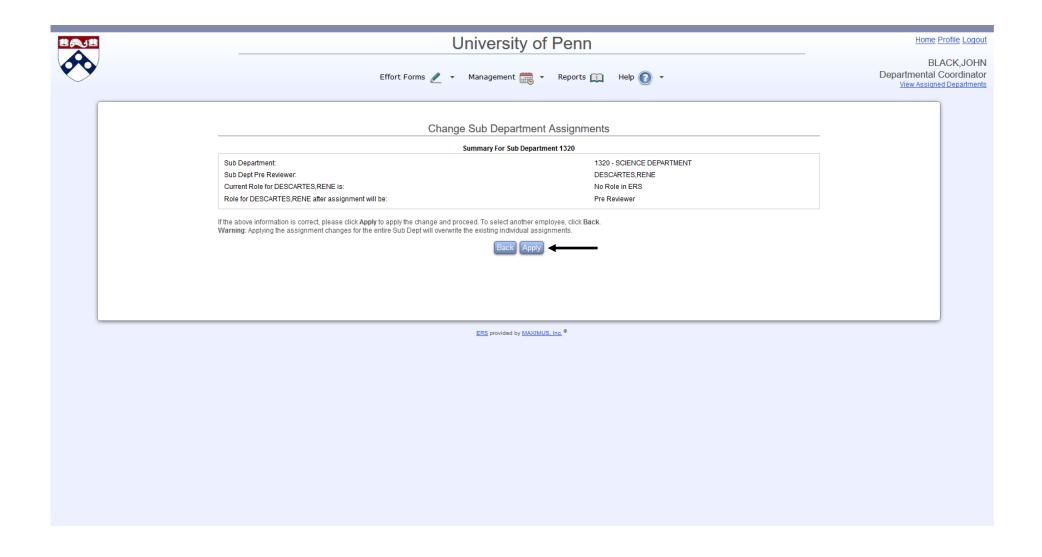
#### Changing Sub Department Pre Reviewer (cont.)

Again, select from the list, or search for another individual by clicking the "Assign somebody not in your domain" link at the top of the page. Select a name and click the "Proceed" button.



#### Changing Sub Department Pre Reviewer (cont.)

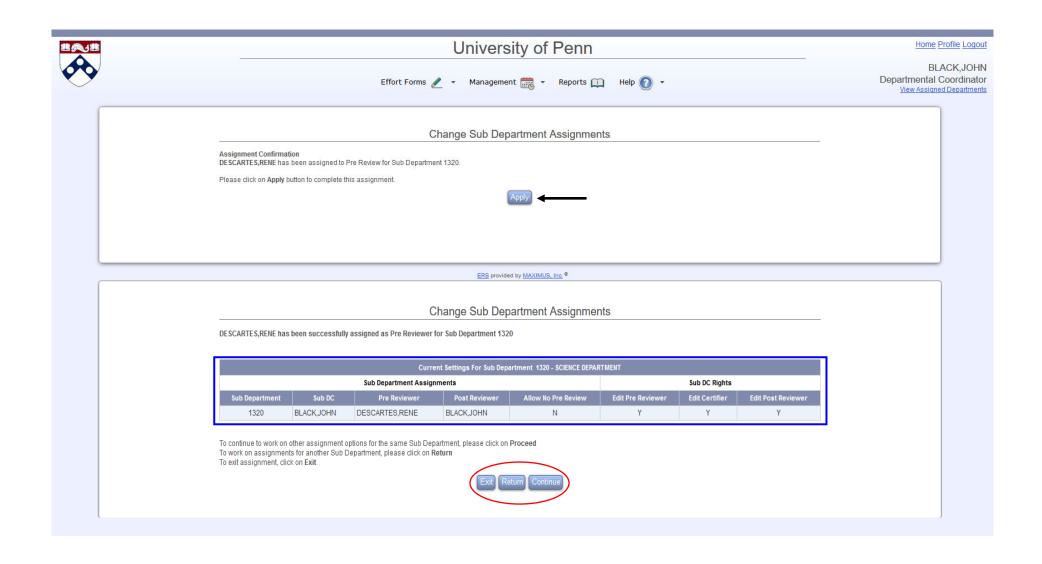
You will see a Summary page that lists the selected individual's *Current* Role and the individual's *New* Role after the assignment takes place. Select "Apply" to continue with the change.



### Changing Sub Department Pre Reviewer (cont.)

Click "Apply" again to complete the assignment change.

Select Continue to return to Assignments or select Exit to work on different tasks.



#### **NEED HELP?**

Detailed instructions and links to reference materials: http://www.upenn.edu/researchservices/effortreportingA.html

Using ERS, or if you are unsure where to get help for a specific question: email ERS Help at ers\_help@isc.upenn.edu