

## Step-by-Step Guide

### ePER Summary by Org Report

### What is the ePER Summary by Org report?

The ePER Summary by Org report is run in the Cognos Reporting System. It focuses on a particular semester and includes all of an organizational unit's individuals who have been paid by a sponsored project, or who have a cost share effort commitment for a sponsored project, and must therefore certify an ePER. The report lists detailed payroll totals allocated to various projects and a dollar amount for "Total Other Institutional Support." It also indicates whether or not their effort has been certified.

### Why should you review this report?

An organizational unit should review this report to see if payroll allocations are correct, who has finished certifying her or his effort, and who has yet to complete this important task.

### How to run this report

First, log in to your campus portal:

Boulder – <https://portal.cusys.edu/MyCUInfoFedAuthLogin.html>

Colorado Springs – <https://portal.cusys.edu/MyUCCSFedAuthLogin.html>

Denver – <https://portal.cusys.edu/UCDAccessFedAuthLogin.html>

System Administration – <https://portal.prod.cu.edu/SYSFedAuthLogin.html>

Select the **CU Resources** tab. Then select **Reporting**.  
Click on **Public Folders** → **ePERs** → **ePERs Summary by Org**.

Select the appropriate **Academic Term** for your report by using the drop-down list.

Enter the Org in the **Keywords** field and click SEARCH.  
Review the Orgs displayed in the **Results** box.

Click on the Org(s) you want to include in the report, and then click INSERT to move the selected Org(s) into the **Choices** box.


To run the report, click FINISH (in the lower left corner of the screen – not shown above).

The screenshot shows the 'Reporting System' interface for the University of Colorado. At the top, it says 'University of Colorado' with subtext 'Boulder | Colorado Springs | Denver | Anschutz Medical Campus'. The title of the report is 'ePERs System Summary by Org(s)'. Below this, there is a section for 'ACADEMIC TERM' with a drop-down menu currently showing 'ACADEMIC TERM'. Below that is the 'ORG' section, which includes a 'Keywords' field with the instruction 'Type one or more keywords separated by spaces.' and a 'Search' button. There are also 'Options' and 'Results' sections. The 'Results' section contains a list of organizational units, each with a checkbox and a 'Select all' link. To the right of the 'Results' list is a 'Choices' section, which is currently empty. Between the 'Results' and 'Choices' sections are 'Insert' and 'Remove' buttons. At the bottom of the 'Results' list is a 'Select all' link, and at the bottom of the 'Choices' list is a 'Deselect all' link.

## Step-by-Step Guide ePER Summary by Org Report

### How to read your report: understanding data elements

Each ePER Summary by Org report should have the same elements as the report below:



University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus

1

Personnel Effort Reporting System

ePERS Summary by Org

SPRING 2007

Page: 1

Run Date: Mon, Sep 10, 2007

Run Time: 2:24:09 PM

Reporting System

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EMPL ID	EMPL NAME	POSITION NUM	SPD TYPE	PROJ ID	SPONSOR	DESC	AMOUNT	PAY PCNT	CS PCNT	PAY W/CS PCNT	CERT PCNT	
14 ORG: 10324 CHEMICAL AND BIOLOGICAL ENGIN												
183773	Adzima, Brian James	00607666	13071195	1542584	NIDCR	NOVEL CROSSLINK POLY	9,770.85	100	0	100	100	
							9,770.85	100	0	100	100	
152341	Alford, John	00639075	13074541	1543211	NIBIB	AGGREGATION OF PROTE	5,862.51	100	0	100	100	
							5,862.51	100	0	100	100	
174606	Bee, Jared S	00662489	63032419	2537770	AMGENRES	AMGEN CNTF RES #12C	9,770.85	100	0	100	100	
							9,770.85	100	0	100	100	
177812	Benton, Julie A	00603687	13057199	1540070	AHA	TISSUE ENGINEERING H	1,738.71	77	0	77	77	
		00603687	13062463	1541025	NSF	ALAN T. WATERMAN AWA	11.29	1	0	1	1	
		00613667				OTHER INST SUPPORT	500.00	22	0	22	22	
							2,250.00	100	0	100	100	
183242	Berman, Gregory Michael	00603688				OTHER INST SUPPORT	2,991.20	99	0	99	99	
		00603688	13062463	1541025	NSF	ALAN T. WATERMAN AWA	20.16	1	0	1	1	
							3,011.36	100	0	100	100	
107503	Bowman, Christopher	00159071				OTHER INST SUPPORT	79,242.25	77	0	58	0	
		00159071	13052676	1535879	NIDCR	PHOTOPOLYMERIZED GEL	2,874.07	3	5	8	0	
		00159071	13053454	1536138	NSF	FERROELECTRIC LIQUID	0.00	0	13	13	0	
		00159071	13073040	1542916	NSF	GOALI: ADVANCED THIO	0.00	0	1	1	0	
		00607790	13071195	1542584	NIDCR	NOVEL CROSSLINK POLY	8,510.06	8	1	9	0	
		00611337				OTHER INST SUPPORT	7,620.03	7	0	7	0	
		00660633				OTHER INST SUPPORT	4,668.78	5	0	5	0	
							102,915.19	100	20	101	0	
143183	Brotherton, Christopher M	00616349	13061520	1540852	AMCHEMPRF	EMULSION FLOW THROUG	6,793.07	100	0	100	100	
							6,793.07	100	0	100	100	
111785	Bryant, Stephanie J	00664359				OTHER INST SUPPORT	42,026.67	89	0	56	22	
		00664359	13067938	1542177	NIDCR	MECHANICAL STIMULATI	0.00	0	33	33	67	
		00673234				OTHER INST SUPPORT	1,279.07	3	0	3	3	
		00673234	13067938	1542177	NIDCR	MECHANICAL STIMULATI	3,837.22	8	0	8	8	
							47,142.96	100	33	100	100	
16 TOTAL FOR ORG: 10324							1,746,391.57					

#### Elements of the report:

- Report Header** – provides information about the report, including the University of Colorado logo, report title, etc. Pay particular note to academic term listed on the bottom row of the Report Header. The report in the example above is for the Spring 2007 academic term.
- Empl ID** – lists the employee ID for each individual that had a PER created, whether or not the PER has been certified.
- Empl Name** – lists the name of each individual that had a PER created.
- Position Num** – lists every position number for each employee for which effort has been paid or cost share effort commitments have been made during the semester. Each position number will be reported separately on one ePER.
- Spd Type** – shows the SpeedType of the project to which the effort was charged. Individual SpeedTypes are not listed for "Other Inst Support" because all non-project salary is combined into one total.

## Step-by-Step Guide *ePER Summary by Org Report*

6. **Proj ID** – shows the project ID to which the effort was charged. *Note: Program IDs are not provided in the report.*
7. **Sponsor** – indicates an abbreviation for the name of the entity that funds the project.
8. **Desc** – provides the brief description of the project as it appears in the Finance System.
9. **Amount** - indicates the dollar amount of the individual's effort on each project being charged to the respective SpeedType.
10. **Pay Pcnt** - indicates the percentage of the individual's total salary being charged to the respective SpeedType.
11. **CS Pcnt** – indicates the cost share effort percentage committed to the project.
12. **Pay w/CS Pcnt** - shows the combined percentage of both the pay and the cost share components for the SpeedType indicated.
13. **Cert Pcnt** – indicates what percentage of the effort has been certified. (If the number in column 13 does not equal the number in column 12, then an adjustment must be made.)
14. **Org** – shows the organizational unit number and name.
15. **Individual Totals**– indicates the total amounts of Amount, Pay Pcnt, CS Pcnt, Pay w/CS Pcnt, and Cert Pcnt (columns 9 through 13) for each individual.
16. **Org Total**– sums each individual's amount to indicate the total dollar amount being charged to the organizational unit for project efforts. *However, an individual might be paid from more than one organizational unit.* Therefore, the numbers on the ePER Summary by Org report may not reflect the entire amount of pay and/or cost share that pertains to each person listed on the report.

### **How to read your report: identifying and handling potential issues**

Review the report paying particular attention to the numbers in Column 12 (**Pay w/ CS Pcnt**) and Column 13 (**Cert Pcnt**). If these numbers differ, it means that effort has not been certified exactly as it appears on the ePER. These cases should be reviewed to ensure the certification is appropriate and corrective action is taken to match salary paid with effort certified. Also, pay attention to Column 9 (**Amount**). If a negative salary is listed with one of the SpeedTypes or position numbers, the salary distribution needs to be corrected before the ePER can be certified.