



# JOB AID



## Module 3 – Setting Up Searches in ERS

This Job Aid summarizes material covered in ERS Module 3 - Setting Up Searches in ERS. This Job Aid will explain the ERS search functions and how you can use them to identify and manage the lists of Effort Reports.

This Job Aid covers the following topics:

Overview ..... 1

PI Search/Subscribe to PI's "My Projects" ..... 1

Department Search ..... 4

Selecting Saved Searches from the Effort Report List page ..... 9

The Manage Saved Searches Page ..... 10

### Overview

The Effort Reporting System provides the ability to search all of the Effort Reports in the system to find the ones that are needed for review and certification. The first time you sign into ERS you should create and save the searches that you will use for every Effort Reporting cycle. The effort reporting responsibilities of each department are to ensure that:

- the Effort Reports of all employees who work for the department's PIs are certified
- the Effort Reports for all employees in the department are certified, even if an employee works for a PI in another department

The PI Search/Subscribe to PI's "My Projects" and the Department Search are described below.

### PI Search/Subscribe to PI's "My Projects"

The best way to view a specific PI's list of Effort Reports is to "Subscribe" to the PI's list. The PI list is also known as the "My Projects" list, which is a standard report for every PI, and is automatically generated by ERS to show any employee with payroll activity on the PI's Funds.

***By subscribing to the PI's "My Projects" list, you are able to see the same list of Effort Reports that the PI sees.*** This makes it possible for Reviewers to easily identify and then modify the Effort Reports prior to certification by the PI.

At the bottom left of the **Manage Saved Searches** page is the **Subscribe** button.

This is the button you click to open a new browser window that will display all PIs that have projects with Effort Reports as shown below.

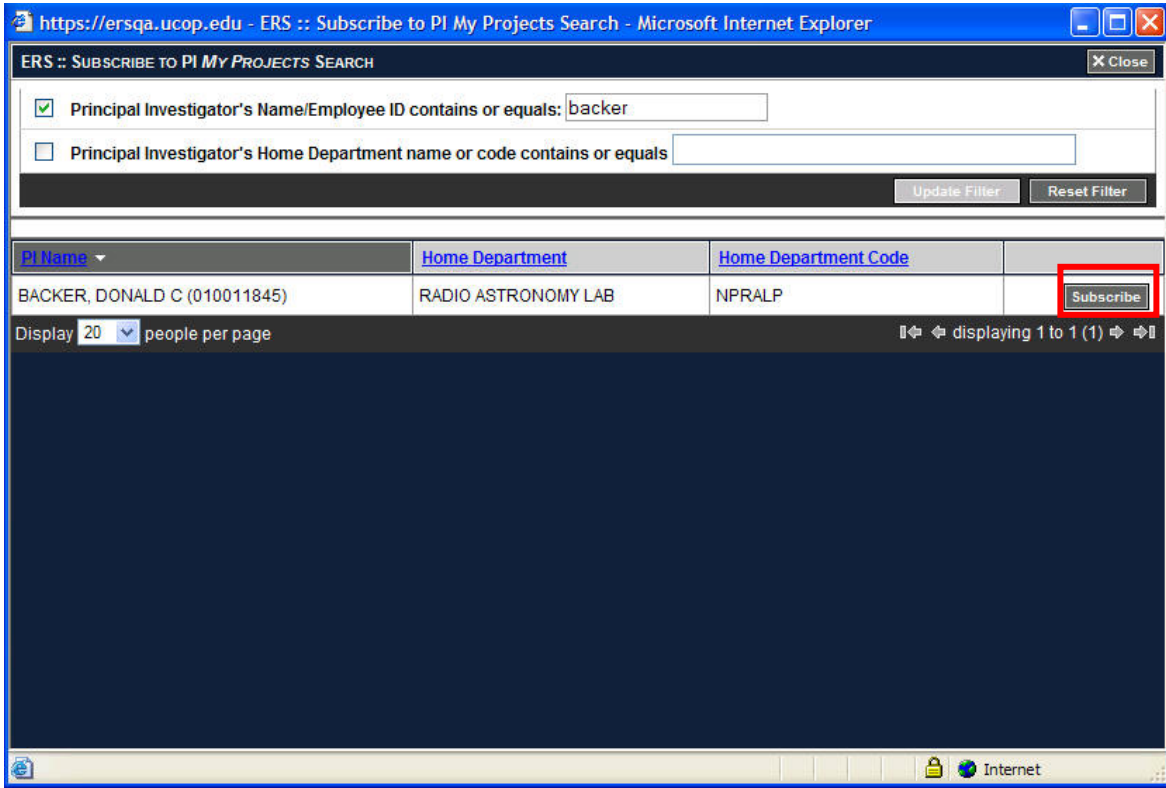
Once you are on the **Subscribe to PI My Projects Search** page, locate the PI by searching for the PIs name or Employee ID and click **Update Filter**, which will “filter” your search results.

PI Name	Home Department	Home Department Code	
ABRAHAMSON, DOR	SCHOOL OF EDUCATION	EAEDUP	Subscribe
ABRAMS, BARBARA	SCHOOL OF PUBLIC HEALTH	CPSPHP	Subscribe
ACKERLY, DAVID D.	INTEGRATIVE BIOLOGY	IBIBIP	Subscribe
ADAMS, ANTHONY	SCHOOL OF OPTOMETRY DEAN	BOOPTP	Subscribe
AGANAGIC, MINA	PHYSICS	PHYSIP	Subscribe
AGGARWAL, VINOD K	POLITICAL SCIENCE	SPOLSP	Subscribe
AGOGINO, ALICE M	COENG MECHANICAL ENGINEERING	EKMEGP	Subscribe
AGRAWALA, MANEESH	COMP SCI DIV OPERATIONS	EH1CSP	Subscribe
AHERN, JENNIFER E.	SCHOOL OF PUBLIC HEALTH	CPSPHP	Subscribe
AHN, DAVID SEHUN	ECONOMICS	SECONP	Subscribe

Once you identify the PI you need, click the appropriate **Subscribe** button to add the PI's **My Projects** list to your list of saved searches.

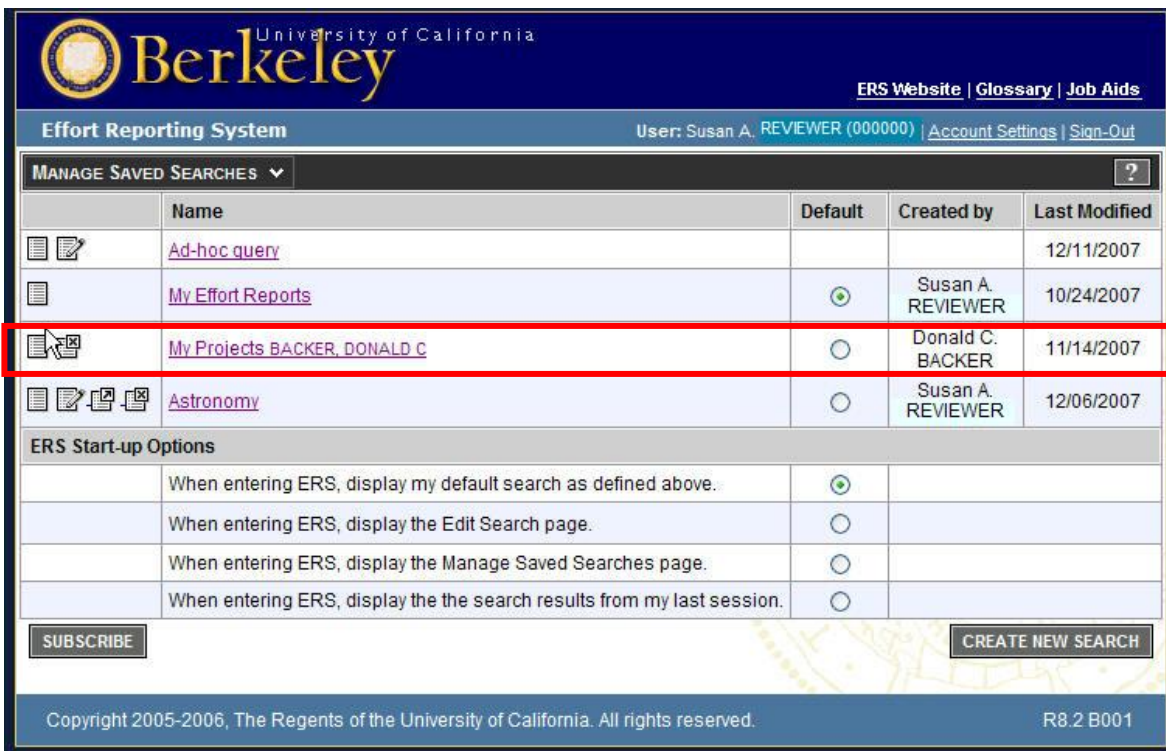
Another option to easily subscribe to a number of PIs in your department is to *first* filter by your Home Department. Then, you can click on the **Subscribe** button next to each PI for which you

have responsibility. You can enter all or part of the PI's name, and then click the **Update Filter** button to find the PI(s) you need to subscribe to.



Click the **Subscribe** button on the line for each PI you want to include in your review of Effort Reports.

You now have a Saved Search of that PI's **My Projects** list!



## Department Search

When you first login to ERS, you will be taken to the **Effort Report List** page.



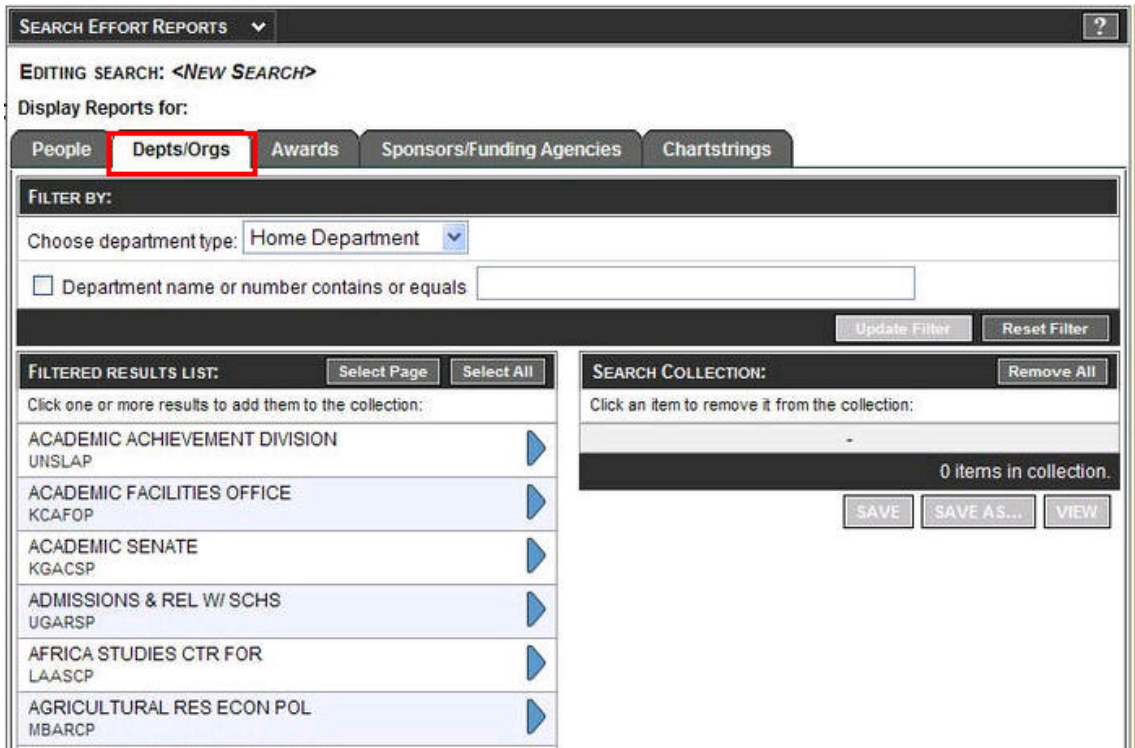
To get to the **Search Effort Reports** page...

Click on the **Effort Report List** title...and select **Search Effort Reports** from the drop down menu.

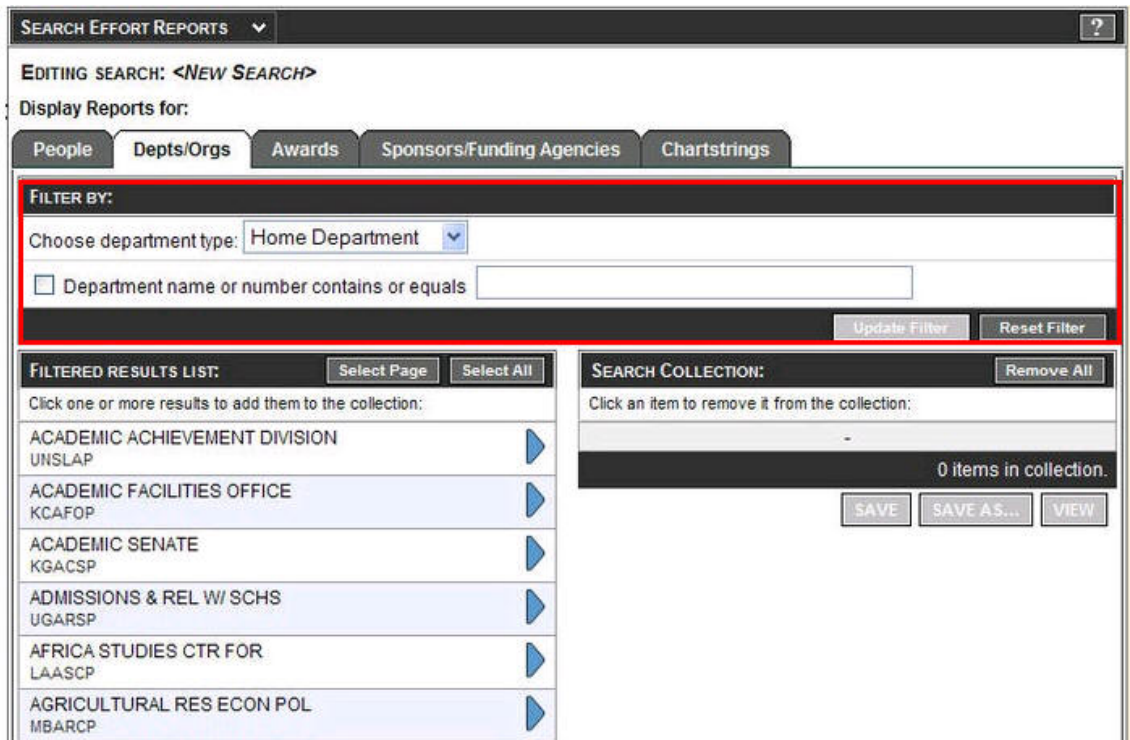




On this page, ERS provides five search tabs: **People**, **Depts/Orgs**, **Awards**, **Sponsors/Funding Agencies**, and **Chartstrings**. You'll want to first create a search using the **Depts/Orgs** page. Keep in mind that search features are similar on all three search pages.



Click on the “Depts/Orgs” tab.



To proceed, on the Dept/Orgs page, first select a Department type from the drop-down menu.

The screenshot shows the 'SEARCH EFFORT REPORTS' interface. At the top, it says 'EDITING SEARCH: <NEW SEARCH>' and 'Display Reports for:' with tabs for 'People', 'Depts/Orgs', 'Awards', 'Sponsors/Funding Agencies', and 'Chartstrings'. Under 'FILTER BY:', there is a dropdown menu for 'Choose department type:' with 'Home Department' selected. Below it, there is a checkbox for 'Department name or' and a text input field. A dropdown menu is open, showing 'Home Department', 'Account Department', and 'Fund Department' (highlighted in blue). To the right of the dropdown are 'Update Filter' and 'Reset Filter' buttons. Below the filter section is a 'FILTERED RESULTS LIST:' with 'Select Page' and 'Select All' buttons. The list contains several department names with blue arrows to the right: ACADEMIC ACHIEVEMENT DIVISION UNSLAP, ACADEMIC FACILITIES OFFICE KCAFOP, ACADEMIC SENATE KGACSP, ADMISSIONS & REL W/ SCHS UGARSP, AFRICA STUDIES CTR FOR LAASCP, AGRICULTURAL RES ECON POL MBARCP, AM CULTURES HISTORY & INSTIT QJACHP, and ANTHROPOLOGY SZANTP. To the right of the list is a 'SEARCH COLLECTION:' section with a 'Remove All' button. It says 'Click an item to remove it from the collection:' and shows '0 items in collection.' Below this are 'SAVE', 'SAVE AS...', and 'VIEW' buttons.

**Note:**

When you select **Home Department** (default) your search results will include Effort Reports for **all employees with payroll activity within the home department** that matches your search.

When you select **Account Department** your search results will include Effort Reports for all employees with payroll activity on an Org Code based on the 5-digit numeric Org Code in your search.

When you select **Fund Department** your search results will include Effort Reports for all employees with payroll activity based on your **5-character level 4 (L4) or level 5 (L5) processing unit in the UCB org tree. This is EFA's recommended business practice to ensure the search captures all reports.**

Second, enter all or part of the Dept. name or L4/L5 org tree code in the search box if you have selected **Fund Department**. In the example below, we have used the Org Code PAAST.

Third, click on the **Update Filter** button.

The **Filtered Results List** returns a list of all campus departments that match your criteria.

SEARCH EFFORT REPORTS

EDITING SEARCH: <NEW SEARCH>

Display Reports for:

People Depts/Orgs Awards Sponsors/Funding Agencies Chartstrings

FILTER BY:

Choose department type: Fund Department

Department name or number contains or equals PAAST

Update Filter Reset Filter

FILTERED RESULTS LIST: Select Page Select All

Click one or more results to add them to the collection:

Astronomy PAAST	▶
PAAST Astron Gen Ops 12980	▶
PAAST Computing 12981	▶
PAAST Facilities 12982	▶
PAAST Research 12984	▶
PAAST Research Non-Grants 12983	▶
PAAST Temp Instructional Costs 12985	▶

SEARCH COLLECTION: Remove All

Click an item to remove it from the collection:

-

0 items in collection.

SAVE SAVE AS... VIEW

You can move items you wish to include in your search from the **Filtered Results** to your **Search Collection** by either: Clicking on each individual item...



...or by clicking on the **Select Page** to move all of the items on the page or the **Select All** button to move *all of* the items. Clicking **Select All** is a shortcut if you know you would like to move ALL of the results under one Dept. code.

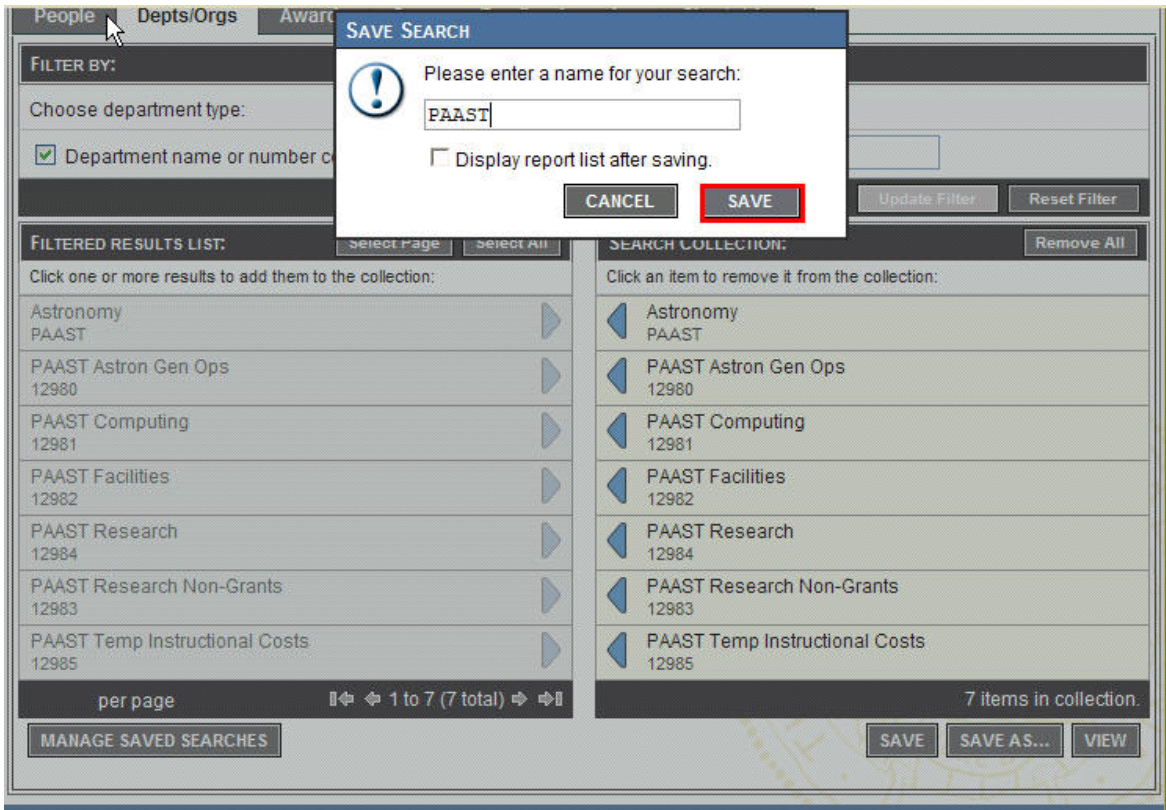


When you have all the items you want in your **Search Collection**, you can either save the search so that you can use it again in the future, or you can go directly to the list of effort reports. To save the search, click the save button.



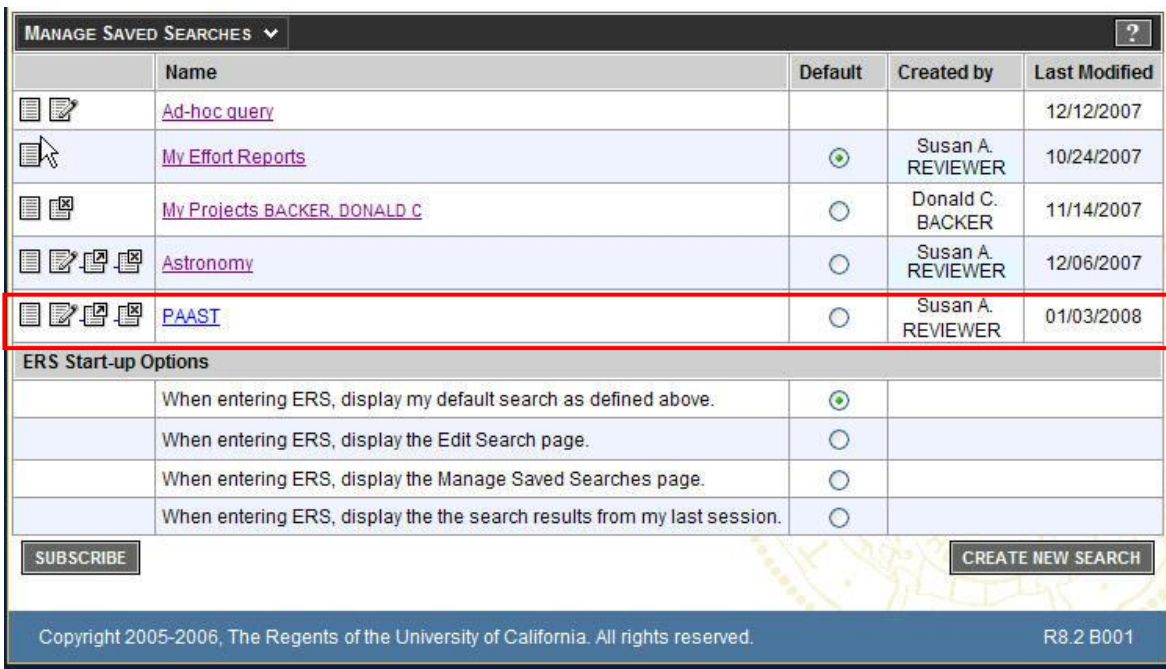
When you **Save** the search, a box pops up and asks for a name for the Search. Name the search and then click the **Save** button.





The saved search is displayed under the **Manage Saved Searches** list. After you create and save a search, you can view the resulting Effort Report list by clicking on the name of the search. The saved search in our example is named “PAAST”.

Or, you can **View** the Effort Report List without saving the search. When you specify filtering criteria for a search and you click the **VIEW** button, ERS automatically performs the search and saves it as an ad-hoc query. The query is then listed in the **Manage Saved Searches** along with your other saved searches as seen below.





This shows the Effort Report List resulting from your saved search of “PAAST”.

EFFORT REPORT LIST					Export List	Send List	Print List	?
Display Saved Search: PAAST								
Show Status: ALL					Reporting Periods: <input checked="" type="radio"/> All <input type="radio"/> Select: 06/07 Non-Acad Quarter 3			
Display 20 reports per page					displaying 1 to 20 (52 total)			
Period	For	Department	Last Modified	Status				
06/07 Non-Acad Quarter 1	HARE, JONAH	ASTRONOMY	04/01/2007 v1.0	Exception				
06/07 Non-Acad Quarter 1	KIRIAN, RICHARD	ASTRONOMY	04/01/2007 v1.0	Open				
06/07 Non-Acad Quarter 1	MEYER, EVE R.	ASTRONOMY	04/01/2007 v1.0	Open				
06/07 Non-Acad Quarter 1	MOORE, MATTHEW	ASTRONOMY	04/01/2007 v1.0	Open				
06/07 Non-Acad Quarter 1	SHEEHY, CHRISTOPHER I	ASTRONOMY	04/01/2007 v1.0	Open				
06/07 Non-Acad Quarter 1	STARR, DAN LAWSON	ASTRONOMY	04/01/2007 v1.0	Open				
06/07 Acad Semester Fall	ALATALO, KATHERINE	ASTRONOMY	10/24/2007 v2.0	Certified				
06/07 Acad Semester Fall	BACKER, DONALD C	RADIO ASTRONOMY LAB	04/24/2007 v1.0	Not Required				
06/07 Acad Semester Fall	BASRI, GIBOR	ASTRONOMY	10/15/2007 v1.1	Not Required				
06/07 Acad Semester Fall	BLITZ, LEO	RADIO ASTRONOMY LAB	04/24/2007 v1.0	Not Required				
06/07 Acad Semester Fall	BLOOM, JOSHUA S	ASTRONOMY	04/25/2007 v1.0	Not Required				
06/07 Acad Semester Fall	CHIANG, EUGENE	ASTRONOMY	04/24/2007 v1.0	Not Required				

ERS gives you the ability to save, print or share your searches. You can run your search at any time, and ERS will produce a Report List based on your search criteria. You can also sort Report Lists by name, date last modified, reporting period and status.

### Selecting Saved Searches from the Effort Report List page

ERS allows you to execute any of the searches that appear on the **Manage Saved Searches** page from a drop down list at the top of the **Effort Report List** page.

Selecting a saved search from the **Display Saved Search** list will execute that search.

First, click on the drop down arrow next to **Display Saved Search**.

All the searches that you saved on the **Manage Saved Searches** page appear in the drop down list.

Select the **My Projects... PI NAME** (in this case it is Backer, Donald C).

Selecting this **Saved Search** executes the search and results in a list of Effort Reports to review.

Period	For	Department	Last Modified	Status
06/07 Acad Semester Fall	PARSONS, AARON	ASTRONOMY	04/25/2007 v1.0	Open
06/07 Acad Semester Fall	DEMAREST, PAUL B	ASTRONOMY	12/19/2007 v1.2	Partially Certified

## The Manage Saved Searches Page

The **Manage Saved Searches** page can be reached by selecting it from the drop-down box in the upper left hand corner of any ERS page. From this page, as seen below, you can:

1. Subscribe to a PI's My Projects list using the **Subscribe** button.
2. Execute, edit, share, and delete your saved searches using the icons on the left.
3. Select your ERS start-up page from the choices at the bottom of the page.

MANAGE SAVED SEARCHES <span style="float: right;">?</span>				
	Name	Default	Created by	Last Modified
	<a href="#">Ad-hoc query</a>			12/12/2007
	<a href="#">My Effort Reports</a>	<input checked="" type="radio"/>	Susan A. REVIEWER	10/24/2007
	<a href="#">My Projects BACKER, DONALD C</a>	<input type="radio"/>	Donald C. BACKER	11/14/2007
	<a href="#">Astronomy</a>	<input type="radio"/>	Susan A. REVIEWER	12/06/2007
	<a href="#">PAAST</a>	<input type="radio"/>	Susan A. REVIEWER	01/03/2008
ERS Start-up Options				
	When entering ERS, display my default search as defined above.	<input checked="" type="radio"/>		
	When entering ERS, display the Edit Search page.	<input type="radio"/>		
	When entering ERS, display the Manage Saved Searches page.	<input type="radio"/>		
	When entering ERS, display the the search results from my last session.	<input type="radio"/>		
<b>SUBSCRIBE</b>		<b>CREATE NEW SEARCH</b>		
Copyright 2005-2006, The Regents of the University of California. All rights reserved.				R8.2 B001

Once you create and save a search, and it appears on your Manage Saved Searches page, you have the option of executing, editing, sharing, or deleting the Saved Search.



These functions are completed using these icons on the left side of the page:

- The **pad** icon is used to execute the search. Click on the icon and the results will display.
- The **pad and pencil** icon is used to edit the search. Click on this icon to edit your previously saved search. ERS retrieves the Saved Search original criteria. You may then edit the criteria and continue on to save or view.
- The **pad and arrow** allows you to share your saved search by emailing it to another ERS user. ERS connects your email program and generates an email. Enter the email address of the individual you wish to share the saved search; write an additional message if needed and send.

If you receive a shared search email and want to use the saved search, click the link in the message. You will be taken to ERS and will have to log in if you have not already done so.

When you accept the search, it will be added to your personal list of searches which is visible on the **Manage Saved Searches** page. The person who sent you the search remains its owner. They can modify the search and you will automatically receive their changes with no action needed on your part. You may use the search as you would any other search that you created and saved yourself. However, if you attempt to edit a search that was shared with you, you will be given a private copy of that search for your use, and will no longer be linked to automatically receive changes from the original search.

- The **pad and X** is used to delete the search. Click this icon to delete your previously saved search. If you delete a search that was shared with you, you are deleting only your subscription to that search. You will not be able to delete the search from its owner or from any other users of that search.

When you sign in to ERS, you are taken to the same page each time. You can set ERS to default to a specific page by selecting the radio button next to the page you want as the default.

ERS Start-up Options		
	When entering ERS, display my default search as defined above.	<input type="radio"/>
	When entering ERS, display the Edit Search page.	<input type="radio"/>
	When entering ERS, display the Manage Saved Searches page.	<input type="radio"/>
	When entering ERS, display the the search results from my last session.	<input checked="" type="radio"/>