Creating Saved Searches (Reports) in ERS
Objective

◆ Be familiar with several different types of searches and reports you can generate in ERS to help you identify and manage the reports for which you are responsible.
Getting Started

- To search for effort reports select the **Search Reports** tab at the top left of the page. (This tab is selected by default when logging in to ERS)

- There are four standard searches available in ERS: 1) People 2) Departments 3) Funds 4) Projects
Creating Saved Searches - Department

- Select the Departments Tab
- Choose the department type*
- Enter the Department Name or Department Code
- Click Update Filter
Choose Department Type
(3 types of department searches available)

◆ Account Department
  ▪ **Default**: A list of effort reports for employees that are paid from the searched department’s accounts
Choose Department Type

(3 types of department searches available)

◆ **Home Department**

- A list of effort reports that includes employees that currently list the searched department as their home department in EDB.

- If an employee was a part of the searched department in the past, but has since moved to another department, they will not show up on the searched department’s list. All of their effort reports (past and present) will show on their new department’s list.

◆ **Fund Department**

- A list of effort reports for employees that are paid from the searched department’s funds.
Creating Saved Searches - Department

Here is the **Filtered Results List** of reports that belong to that Department.

Click the blue arrow to move individual entries to the right **Search Collection** side or the **Select All** button to move entire list.
Creating Saved Searches - Department

You can add multiple departments to your search

- Enter multiple department codes in the **Multiple Department/Org numbers equal** field, comma and no space
- Select **Update Filter** & **Select All** to move all to left hand column **Search Collection**
Select the **Save As** button to make the **Save Search** pop up box appear. Title your search and save.
Creating Saved Searches - Department

Once saved, the search will appear under the Manage Searches tab

- Saved searches can be Viewed, Copied, Edited, Shared and Deleted
Sharing a Saved Search

This can be useful to send searches to a PI, lab manager, supervisor, or any other individual involved in with the certification process.

Selecting the Share Saved Search icon will open up your email and allow you to send the search to a person of your choice. When the search is accepted by the other user, it will be added to their personal list of searches which is visible on the Manage Searches page.

The person who sent the search remains the owner. They can modify the search and the other user will automatically receive the changes with no action required on their part.

The user may use the search as they would any other search they created and saved themselves. However, if they attempt to edit the search which was shared to them, they will be given a private copy of that search and will no longer be linked to the original search that was sent.
Viewing the Department List

![Screenshot of Effort Reporting System](image)

### Effort Reporting System

**Display Saved Search:** Ad-hoc query

**Show Status:** ALL

**Reporting Periods:**
- All
- Select: Fall 10

**Pls in bold and highlighted**

<table>
<thead>
<tr>
<th>Period</th>
<th>Employee</th>
<th>Department</th>
<th>Last Modified</th>
<th>Status</th>
<th>Under Prelim Review</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer 10: REG 11/12 Academics</td>
<td></td>
<td>REG 11/12 Academics</td>
<td>03/03/2011 v2.0</td>
<td>Certified</td>
<td></td>
</tr>
<tr>
<td>Summer 10: REG 11/12 Academics</td>
<td></td>
<td>REG 11/12 Academics</td>
<td>02/28/2011 v2.0</td>
<td>Certified</td>
<td></td>
</tr>
<tr>
<td>Summer 10: REG 11/12 Academics</td>
<td></td>
<td>REG 11/12 Academics</td>
<td>01/14/2011 v1.0</td>
<td>Not Required</td>
<td></td>
</tr>
<tr>
<td>Summer 10: REG 11/12 Academics</td>
<td></td>
<td>REG 11/12 Academics</td>
<td>01/14/2011 v1.0</td>
<td>Open/Overdue</td>
<td></td>
</tr>
<tr>
<td>Summer 10: Off-Qtr 9/12 Acad</td>
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</table>
Summary: Search by Department

1. Click *Departments* tab to search by Home, Account or Fund department

2. Type in department name or code into the single or multiple search field

3. Click: *Update Filter*

4. Click blue arrow(s) or *Select All in Filtered Results* list to move list to right side into the *Search Collection* field

5. Click *Save As* button in lower right

6. Name report in the pop up box that appears

7. Click the *Save* button
Creating Saved Searches - People

1. Click **People** tab to search by employee’s name or ID
2. Type in employee ID number or name (last name first followed by a comma, no space then the first name)*
3. Click: **Update Filter**
4. Click blue arrow in **Filtered Results List** to move record(s) to right side into the **Search Collection** field
5. Click **Save As** button in lower right
6. Name report in the pop up box that appears
7. Click the **Save** button

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*You can also search for multiple employees at the same time by entering multiple EIDs, separated by commas.*
Creating Saved Searches - Funds

1. Click **Funds** tab to search by fund
2. Type in fund number
3. Click: **Update Filter**
4. Click blue arrow in **Filtered Results** list to move record(s) to right side into the **Search Collection** field
5. Run another search for other funds you want to add if desired
6. Click **Save As** button in lower right
7. Name report in the pop up box that appears
8. Click the **Save** button
Creating Saved Searches - Projects

1. Click **Project** tab to search by project
2. Select search type and fill in information
3. Click: **Update Filter**
4. Click blue arrow in **Filtered Results** list to move record(s) to right side into the **Search Collection** field
5. Run another search for other projects you want to add if desired
6. Click **Save As** button in lower right
7. Name report in the pop up box that appears
8. Click the **Save** button
Creating a PI’s *My Projects* search will generate a list for anyone that is paid from the specified PI’s FAUs (Full Accounting Unit).

Creating Managed Searches
Creating Saved Searches—My Projects

Select the **Manage Searches** tab

This is the list that the PIs will see when they log into ERS

**Click Subscribe**
Creating Saved Searches – My Projects

Enter the PI’s name or ID number

Click Update Filter or press enter

Select Subscribe to ‘My Projects’ and close the window

You can also select Subscribe to ‘My Certifications’
Creating Saved Searches – My Projects

Now you have created a **My Projects** list for the PI of your choice which will appear in the **Manage Searches** tab.
Summary: Saved Searches – My Projects

1. This tab is mainly used when searching for employees paid on a PI’s project(s) to identify the PI’s certification responsibility.

2. Select the **Manage Searches** tab.

3. Click **Subscribe** which is at the bottom left of the page.

4. Enter the PI’s name or ID number then select **Update Filter**.

5. Then select **Subscribe** which will be to the right side of the line containing the PI’s name.

6. Close the window and now you have created a **My Projects** list for the PI of your choice.
Important Note

• There may be many employees on the PI’s *My Projects* list that the PI should not certify.
  – Other PIs that are paid from their funding source
  – Employees paid from their funding source that they do not have suitable means of verifying the work performed

• A best practice recommended by many research administrators is to *sit down with their PIs and assist them in the certification process*. This way you can ensure that the reports are certified correctly.
  – If you cannot sit with the PI please make sure they are aware of which reports they should avoid (if any)
‘My Certifications’ list will include employees paid from accounts linked to the searched PI and the PI’s personal effort reports (whether or not the searched PI is paid from their own accounts). This list excludes other Faculty in Professorial, Professional Research, and Management Titles.

Note: If an employee works for a PI but is paid from a funding source that is not linked to the PI, their effort reports will not be included on this list.
When viewing a report list there is also a dropdown menu which contains all of your saved searches.
When viewing any list you can sort it by Status or Quarter

- The **Show Status** option allows you to sort your lists based on the report status. Recommended: **ALL-Open**

- The **Reporting Periods** option allows you to search effort reports for specific reporting periods. Recommended: **All**
Scenario 1: Manage Search

- The fund managers received notification that the Fall ‘14 and Winter ‘15 effort reports were available for review and certification. The PI had several employees that worked on his various projects.

Q: How would you prepare the manage search(es) to ensure that all of the effort reports are included for verification?

1: Create searches by ...

2: What do you expect to see?
Scenario 1: My Projects

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<tbody>
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<tr>
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- **Principal Investigator**
- **Co-Investigator 1**
- **Co-Investigator 2**
- **Co-Investigator 3**
Scenario 1: My Certifications
Then what?

- Review the list of open reports
- Review the report and verify that it is correct and all applicable FAU’s are included
- Include a comment (Review and verified, name, date) and save
- Have the appropriate person certify the report

- If the account and cost center belongs to another department, contact them to let them know the report is open. You can find a list of ERS Coordinators here:
  - [http://ora.research.ucla.edu/EFM/Pages/ERSHelp.aspx](http://ora.research.ucla.edu/EFM/Pages/ERSHelp.aspx)
Fund 12345 is a federal fund that will end August 2015. Fund 12345 is also linked to several other accounts and cost centers in your department.

Q: As a fund manager overseeing this award, how can you ensure that all reports linked to 12345 are certified?

1: Create searches by...

2: What do you expect to see?
Scenario 2: - continued

- A: Run a “fund” search
  - Select all the accounts and cost centers linked to 12345
  - Save the fund search so that it will appear on your “Manage Searches” tab
  - Open your saved search to determine which reports are still open
Scenario 2 - continued
Scenario 2- continued

[Image of a table and a screenshot of a software interface]
Scenario 2 - continued

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<tbody>
<tr>
<td>Summer 14: REG</td>
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<td>RADIOLICAL SCIENCES</td>
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<td>Open/Overdue</td>
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<td>Academics</td>
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<td>Summer 14: REG</td>
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<td>UROLOGY</td>
<td>04/07/2015 v2.2</td>
<td>Open-Reopened/Overdue</td>
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<tr>
<td>Non-Academics</td>
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Display 100 reports per page
Then what?

◆ Review the list of open reports

◆ Review the report and verify that it is correct and all applicable FAU’s are included

◆ Include a comment (Review and verified, name, date) and save

◆ Have the appropriate person certify the report

◆ If the account and cost center belongs to another department, contact them to let them know the report is open. You can find a list of ERS Coordinators here:
  ▪ [http://ora.research.ucla.edu/EFM/Pages/ERSHelp.aspx](http://ora.research.ucla.edu/EFM/Pages/ERSHelp.aspx)
  ▪ This occurs when funds are linked to several account and cost centers and you are the home PI fund manager.
Questions?