Work07– Fund Search

Summary .....................................................................................................................................................................1
Purpose .......................................................................................................................................................................1
Screen Group ..............................................................................................................................................................2
Screen View ................................................................................................................................................................3
Fund Search ................................................................................................................................................................4
Fund Search Results Grid ............................................................................................................................................5
Report Generation ......................................................................................................................................................7
Page Access ................................................................................................................................................................7

Summary
Below are some of the main elements of the Payroll By Person page:

Purpose
The purpose of Worklist Fund Search screen is to allow users to search and filter the funds in their population. A sample screenshot is shown below:
Screen Group

The Fund Search page is accessed in two ways:

1. By clicking the My Funds in the top menu (green box, below), and then clicking the Fund Search (red box, below):

2. By clicking any of the hyperlinks on the Worklist Page (red box, below).
If users navigate to the Fund Search page by clicking on any of the links on the Worklist Page, the Fund Search page will **automatically be filtered** to match the parameters of the link that was clicked (i.e. the same filters will apply to Fund Search as apply to the link).

Below is a sample screen shot of the Fund Search page (and its filters) as it would appear if accessed by clicking **NCE/Amendment** from the Worklist page:

Note that the **Status field** is automatically filtered for **Pending NCE** (red box, above).

**Screen View**

Home and EFM users will have slightly different views of the Fund search page, in that the EFM view will contain an addition filter field for **Category**.

The **Home user view** is shown below:
The EFM user view is shown below:

**Fund Search**

The Fund Search screen contains the following fields and features:

- **Fund #:** Only one fund can be entered in this field. Users can only access funds they have access to. This field will AJAX after 3 characters to show funds that the user has access to.

- **UCLA PATS #:** Only one fund can be entered in this field. Users can only access PATS records they have access to. This field will AJAX after 3 characters to show records that the user has access to.

- **Type:** The values in this drop-down are: **Interim, Final, Final For Budget Period, Not Final** and **All**.

---

v. 02.25.2014
**Category:** This will be viewable for **EFM users only**. The values in this drop-down are: **Financial Report, Report ARRA, Invoice, Invoice Milestone, Auto Payment** and **All**. Users can select multiple items.

**Organization, Division, and Department code:** These fields will AJAX after three characters. Users can select multiple items, separated by a semi-colon.

**Responsible For:** This shows all individuals on the users “team” assigned to the deliverable, even if they are not the current owner. This field is a drop-down menu and users can select multiple items.

**Action Required Only:** If this box is checked, only “Assigned to:” users that own the provision or COP will appear in the results. The default for this field is unchecked.

**Status:** This drop-down allows the user to select the provision status that they wish to search for. Users can select multiple items.

**Due Date:** This allows the user to search by the due date of the provision or COP. This is the due date based on the owner that is logged in. Home and Linked departments will see their due date, and EFM will see their due date.

**PI:** This field will AJAX after three characters, and users can enter multiple PIs, separated by a semi-colon.

**Missing Managing PI:** If this checkbox is selected, only closeout packets with a missing managing PI will appear in the search results. If the checkbox is unselected, all closeout packets and provisions will appear. The default selection is unchecked.

**Sponsor Name:** This field will AJAX after three characters, and users can then select the sponsor name they would like to search.

**Sponsor Award #:** This field should AJAX after three characters, and users can then select the sponsor award # they would like to search for.

**Search Button:** When this button is clicked, the grid below will appear/update with the search results. Sample results are shown below:

If **no fields** are entered in the fund search, the results grid will display **ALL results** for that user.

**Clear Button:** All filter fields will be cleared if the user clicks the Clear button.

**Fund Search Results Grid**

When the user clicks the **Search Button** after filling in the desired filter fields, the **Results Grid** will be displayed:
If a user filters on items that do not exist, a blank grid will appear. The grid will only show results for the provisions that the user has access to.

By clicking the **export to Excel icon** (red box, above), the user can export the search results grid to Excel.

Home and EFM users will have different views of the results grid:

**Home view:**

All columns in the results grid are sortable by clicking in the **column headers**.

**Award Snapshot:** If users click the **Award Snapshot buttons** (green box, above), the award snapshot from the ORA Portal (PATS) will appear in a new window.

**Fund number:** If the user clicks on the **fund number links** (red box, above), for a Final provision (and the Managing PI exists) they will automatically be routed to the COP Overview for that fund. If the COP does not exist (historical fund), the user will get an error message on the COP Overview page. If the fund (COP) is missing a managing PI for a Final provision, the fund number will link to the Fund Attributes page and that fund number will appear. If the user clicks on an interim provision, they will be taken to the Provisions List page and that fund number will appear.
**Report Generation**

The Results Grid can be sent to Excel.

**Page Access**

This page is viewable to all users that have a worklist.