

Creating Searches Effort Reporting System



Introduction

Welcome to the Creating Searches module. In this module you will learn how to create, save, and manage searches, and set up a default search to appear each time you logon to ERS.

Creating Searches – Overview

ERS gives you the ability to search the effort reporting database using various filtering devices to create search criteria. The results of your search can be saved, printed or shared.

You can run your search at any time and ERS will produce a Report List based on your search criteria.

Each Report List shows a list Effort Reports that matched your search criteria.

Searches can be created and used one time or can be saved to be used for future reporting periods as well.

Creating New Searches

ERS provides the functionality to create new searches by allowing users to specify search criteria. ERS searches the ERS database, selects all Effort Reports that meet the specified search criteria and then produces a list that can then be viewed. Searches can be saved for future use.

UNIVERSITY of CALIFORNIA

Effort Reporting System

User: GRAGYRU DONN (333520644) | [Account Settings](#) | [Sign-Out](#)

EFFORT REPORT LIST

Display Saved Search: My Projects Manage Searches... Create New...

Reporting Periods: ☒ All ☐ Select: Winter 04/05 11/12 Academics

REPORT LIST FOR: **My Projects**

Export List Send List Print List

| Period | For | Last Modified | Status |
|------------------------------|---------------------------------------|-------------------|----------------------|
| Winter 04/05 11/12 Academics | AEGORAN FARNINDAZ,IRINTZI (938610243) | 02/07/2006 - v2.2 | Open-Reopened |
| Winter 04/05 11/12 Academics | CLIRK,INDRAW (534334615) | 02/03/2006 - v1.0 | Open |
| Winter 04/05 11/12 Academics | CYWGELL,BORTYN Y (733252545) | 02/03/2006 - v1.0 | Open |
| Winter 04/05 11/12 Academics | KOHN,THYMIS (134894609) | 02/03/2006 - v1.0 | Open |
| Winter 04/05 11/12 Academics | KRODUSZ,MIRGIRAT I (534356306) | 02/03/2006 - v1.0 | Open |
| Winter 04/05 11/12 Academics | MEGOAL,INTYNEY HYRICEY (638637770) | 02/06/2006 - v2.0 | Certified/AdjustReqd |
| Winter 04/05 11/12 Academics | MILDYNIDY,RETI RIQOAL (138660204) | 02/03/2006 - v1.0 | Open |
| Winter 04/05 11/12 Academics | PARLMIN,DABYRIH G (034819561) | 02/03/2006 - v1.0 | Open |
| Winter 04/05 11/12 Academics | SCHOSTAR,MIRK I (533593588) | 02/03/2006 - v1.0 | Open |
| Winter 04/05 11/12 Academics | SON,DYNG (838615773) | 02/03/2006 - v1.0 | Open |

Display 20 reports per page

displaying 1 to 10 (10 total)

Creating New Searches

To create a new Saved Search, click on the **Create New...** button.

UNIVERSITY OF CALIFORNIA











Effort Reporting System User: GRAGYRU DONN (333520644) | Account Settings | Sign-Out

EFFORT REPORT LIST ?

Display Saved Search: My Projects Manage Searches... Create New...

Reporting Periods: ☒ All ☐ Select: Winter 04/05 11/12 Academics

REPORT LIST FOR: **My Projects** Export List Send List Print List

| Period ▾ | For | Last Modified | Status |
|--|---------------------------------------|-------------------|----------------------|
|  Winter 04/05 11/12 Academics | AEGORAN FARNINDAZ,IRINTZI (938610243) | 02/07/2006 - v2.2 | Open-Reopened |
|  Winter 04/05 11/12 Academics | CLIRK,INDRAW (534334615) | 02/03/2006 - v1.0 | Open |
|  Winter 04/05 11/12 Academics | CYWGELL,BORTYN Y (733252545) | 02/03/2006 - v1.0 | Open |
|  Winter 04/05 11/12 Academics | KOHN,THYMIS (134894609) | 02/03/2006 - v1.0 | Open |
|  Winter 04/05 11/12 Academics | KRODUSZ,MIRGIRAT I (534356306) | 02/03/2006 - v1.0 | Open |
|  Winter 04/05 11/12 Academics | MEGOAL,INTYNEY HYRICEY (638637770) | 02/06/2006 - v2.0 | Certified/AdjustReqd |
|  Winter 04/05 11/12 Academics | MILDYNIDY,RETI RIQOAL (138660204) | 02/03/2006 - v1.0 | Open |
|  Winter 04/05 11/12 Academics | PARLMIN,DABYRIH G (034819561) | 02/03/2006 - v1.0 | Open |
|  Winter 04/05 11/12 Academics | SCHOSTAR,MIRK I (533593588) | 02/03/2006 - v1.0 | Open |
|  Winter 04/05 11/12 Academics | SON,DYNG (838615773) | 02/03/2006 - v1.0 | Open |

Display 20 reports per page displaying 1 to 10 (10 total)

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Creating New Searches

ERS takes you to the **Edit Saved Search: <New Search>** screen where you can specify your search criteria.

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Effort Reporting System

User: GRAGYRU DONN (333520644) | [Account Settings](#) | [Sign-Out](#)

[Return to Report List](#)

EDIT SAVED SEARCH: <NEW SEARCH>

Display Reports for:

People

Departments

Projects

Funds

FILTER PEOPLE BY:

☐ Name/Employee ID contains or equals

☐ Person's Home Department name or number contains or equals

☐ Person is Principal Investigator (PI)

Update Filter

FILTERED RESULTS LIST:

Select All

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

AADS,PIOLI JAIN (738621516)

IMM OFC INFO RESOURCES & COMM (814000)

AABI,MARVE MERJIME (738583078)

PATHOLOGY AND LAB MEDICINE (162500)

ABAR,LASLEA M (130887554)

MEDICINE-DEPT ADMINISTRATION (156500)

ABARHIRT,NECYLA KORZAR (938652794)

PSYCHOLOGY (087500)

ABARLAU,THARASI L (638533299)

FINANCE & INFORMATION MANA GEME (401500)

ABARTYWSKE,TEMYTHU L. (338170229)

SOCIAL SCI COMPUTING (121000)

SEARCH COLLECTION:

Remove All

Click an item to remove it from the collection:

-

0 people in collection.

SAVE...

SAVE AS...

VIEW...

Creating New Searches

You can create, edit and save searches by **People**, **Departments**, **Projects**, or **Funds**.

A custom “filtering” option is provided for each search category to help you specify search criteria quickly and easily.

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Effort Reporting System

User: GRAGYRU DONN (333520644) | [Account Settings](#) | [Sign-Out](#)

[Return to Report List](#)

EDIT SAVED SEARCH: <NEW SEARCH>

Display Reports for:

People

Departments

Projects

Funds

FILTER PEOPLE BY:

☐ Name/Employee ID contains or equals

☐ Person's Home Department name or number contains or equals

☐ Person is Principal Investigator (PI)

Update Filter

FILTERED RESULTS LIST:

Select All

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

AADS,PIOLI JAIN (738621516)

IMM OFC INFO RESOURCES & COMM (814000)

AABI,MARVE MERJIME (738583078)

PATHOLOGY AND LAB MEDICINE (162500)

ABAR,LASLEA M (130887554)

MEDICINE-DEPT ADMINISTRATION (156500)

ABARHIRT,NECYLA KORZAR (938652794)

PSYCHOLOGY (087500)

ABARLAU,THARASI L (638533299)

FINANCE & INFORMATION MANA GEME (401500)

ABARTYWSKE,TEMYTHU L. (338170229)

SOCIAL SCI COMPUTING (121000)

SEARCH COLLECTION:

Remove All

Click an item to remove it from the collection:

-

0 people in collection.

SAVE...

SAVE AS...

VIEW...

Creating New Searches

The Filter by **People** looks like this:

Click the appropriate box and/or type in the information to specify search criteria using the **employee name or ID**; the employee's **home department**; or by identifying the **Person as a Principal Investigator (PI)**.

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[Return to Report List](#)

EDIT SAVED SEARCH: <NEW SEARCH> ?

Display Reports for:

People Departments Projects Funds

FILTER PEOPLE BY:

☐ Name/Employee ID contains or equals

☐ Person's Home Department name or number contains or equals

☐ Person is Principal Investigator (PI)

Update Filter

FILTERED RESULTS LIST: [Select All](#)

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

| | |
|--|---|
| AADS, PIOLI JAIN (738621516) | ▶ |
| IMM OFC INFO RESOURCES & COMM (814000) | |
| AABI, MARVE MERJIME (738583078) | ▶ |
| PATHOLOGY AND LAB MEDICINE (162500) | |
| ABAR, LASLEA M (130887554) | ▶ |
| MEDICINE-DEPT ADMINISTRATION (156500) | |
| ABARHIRT, NECYLA KORZAR (938652794) | ▶ |
| PSYCHOLOGY (087500) | |
| ABARLAU, THARASI L (638533299) | ▶ |
| FINANCE & INFORMATION MANA GEME (401500) | |
| ABARTYWSKE, TEMYTHU L. (338170229) | ▶ |
| SOCIAL SCI COMPUTING (121000) | |

SEARCH COLLECTION: [Remove All](#)

Click an item to remove it from the collection:

-

0 people in collection.

[SAVE...](#) [SAVE AS...](#) [VIEW...](#)

Creating New Searches

You can filter with the **People** selection by using a combination of checkboxes and the results will be matched based on **all** the filter criteria specified. For example: to select by Principal Investigator, click the name/employee ID box and enter the name or ID and also click the Person is Principal Investigator box.

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Effort Reporting System

User: GRAGYRU DONN (333520644) | [Account Settings](#) | [Sign-Out](#)

[Return to Report List](#)

EDIT SAVED SEARCH: <NEW SEARCH>

Display Reports for:

People

Departments

Projects

Funds

FILTER PEOPLE BY:

☐ Name/Employee ID contains or equals

☐ Person's Home Department name or number contains or equals

☐ Person is Principal Investigator (PI)

Update Filter

FILTERED RESULTS LIST:

Select All

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

| | |
|--|--|
| AADS, PIOLI JAIN (738621516) | |
| IMM OFC INFO RESOURCES & COMM (814000) | |
| AAVI, MARVE MERJIME (738583078) | |
| PATHOLOGY AND LAB MEDICINE (162500) | |
| ABAR, LASLEA M (130887554) | |
| MEDICINE-DEPT ADMINISTRATION (156500) | |
| ABARHIRT, NECYLA KORZAR (938652794) | |
| PSYCHOLOGY (087500) | |
| ABARLAU, THARASI L (638533299) | |
| FINANCE & INFORMATION MANA GEME (401500) | |
| ABARTYWSKE, TEMYTHU L. (338170229) | |
| SOCIAL SCI COMPUTING (121000) | |

SEARCH COLLECTION:

Remove All

Click an item to remove it from the collection:

-

0 people in collection.

SAVE...

SAVE AS...

VIEW...

Creating New Searches

The Filter by **Departments** looks like this:

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Effort Reporting System

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[Return to Report List](#)

EDIT SAVED SEARCH: <NEW SEARCH>

Display Reports for:

People

Departments

Projects

Funds

FILTER DEPARTMENTS BY:

Choose department type: Home Department

☐ Department name or number contains or equals

Update Filter

FILTERED RESULTS LIST:

Select All

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

ACAD GERIATRICS RES PRGR
820500

ACADEMIC ADVANCEMENT PROGRAM
052300

ACADEMIC PERSONNEL
381200

ACADEMIC PERSONNEL
864000

ACADEMIC PLANNING & BUDGET
381500

ACADEMIC SENATE
535000

ACADEMIC TECHNOLOGY SERVICES
220000

SEARCH COLLECTION:

Remove All

Click an item to remove it from the collection:

-

0 departments in collection.

SAVE...

SAVE AS...

VIEW...

Creating New Searches

To use the department filter, select a **department type** e.g.: Home Department, Account Department or Fund Department.

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[Return to Report List](#)

EDIT SAVED SEARCH: <NEW SEARCH>

Display Reports for:

People

Departments

Projects

Funds

FILTER DEPARTMENTS BY:

Choose department type: Home Department

☐ Department name or number contains or equals

Update Filter

FILTERED RESULTS LIST:

Select All

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

ACAD GERIATRICS RES PRGR
820500

ACADEMIC ADVANCEMENT PROGRAM
052300

ACADEMIC PERSONNEL
381200

ACADEMIC PERSONNEL
864000

ACADEMIC PLANNING & BUDGET
381500

ACADEMIC SENATE
535000

ACADEMIC TECHNOLOGY SERVICES
220000

SEARCH COLLECTION:

Remove All

Click an item to remove it from the collection:

-

0 departments in collection.

SAVE...

SAVE AS...

VIEW...

Creating New Searches

Then enter a key word, letters or numbers that you know the department you are searching for contains or equals.

In this example, med was entered and ERS selected all departments (only one in this case) that matched the search criteria. If more than one appears, select the appropriate ones by clicking the blue wedge.

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Effort Reporting System

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[Return to Report List](#)

EDIT SAVED SEARCH: <NEW SEARCH>

Display Reports for:

People

Departments

Projects

Funds

FILTER DEPARTMENTS BY:

Choose department type: Fund Department

☐ Department name or number contains or equals

Update Filter

FILTERED RESULTS LIST:

Select All

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

| | |
|--|--|
| ACAD GERIATRICS RES PRGR 820500 | |
| ACADEMIC ADVANCEMENT PROGRAM 052300 | |
| ACADEMIC PERSONNEL 381200 | |
| ACADEMIC PERSONNEL 864000 | |
| ACADEMIC PLANNING & BUDGET 381500 | |
| ACADEMIC SENATE 535000 | |
| ACADEMIC TECHNOLOGY SERVICES 220000 | |

SEARCH COLLECTION:

Remove All

Click an item to remove it from the collection:

-

0 departments in collection.

SAVE...

SAVE AS...

VIEW...

Creating New Searches

The filter by **Projects** looks like this:

You can filter projects by entering a:

- Project ID
- Project Title
- Sponsor Award #

The screenshot shows the UNIVERSITY of CALIFORNIA Effort Reporting System interface. At the top, the header includes the university name, the system title "Effort Reporting System", and the user information "User: GRAGYRU DONN (333520644) | Account Settings | Sign-Out". A link to "Return to Report List" is also present.

Below the header, there is a section for "EDIT SAVED SEARCH: <NEW SEARCH>". Underneath, the "Display Reports for:" section has tabs for "People", "Departments", "Projects", and "Funds". The "Projects" tab is selected.

The "FILTER PROJECTS BY:" section contains three filter options, each with a checkbox and a text input field:

- ☐ Sponsored Project ID contains [text input]
- ☐ Sponsored Project Name contains or equals [text input]
- ☐ Sponsor Award # contains [text input]

The third filter option, "Sponsor Award # contains", is highlighted with a red border. An "Update Filter" button is located to the right of the filter options.

Below the filter options, there is a "FILTERED RESULTS LIST:" section with a "Select All" button. It contains a list of project entries, each with a project ID, sponsor award number, and project details. Each entry has a blue arrow button to its right:

- 4-441450/JS-79597 (Sponsor Award #: RSG-02-083-01-LIB) ACS(CA DIV)RSG-02083-01 REITER12/02 25
- 4-441336/JS-57630 (Sponsor Award #: 13562) ABT/HHS 13562 SCHNELLE 06/06 26%
- 4-621932/-57729 (Sponsor Award #: FY04.108.001) COLORADO/DHHS 108001 REIFEL 6/05 21.50
- 4-441329/JF-29738 (Sponsor Award #: RAS U01 AI035040) FDP-NIH DETELS AI35040 3/05 53.50%
- 4-441350/HB-29738 (Sponsor Award #: RAS U01 AI035040)

On the right side of the interface, there is a "SEARCH COLLECTION:" section with a "Remove All" button. It contains a text input field for removing items from the collection. Below this, it states "0 projects in collection." and there are three buttons: "SAVE...", "SAVE AS...", and "VIEW..."

Creating New Searches

The filter by **Funds** looks like this:

You can filter funds by:

- Full Accounting Unit (FAU)
- Fund Title

UNIVERSITY of CALIFORNIA

Effort Reporting System

User: GRAGYRU DONN (333520644) | [Account Settings](#) | [Sign-Out](#)

[Return to Report List](#)

EDIT SAVED SEARCH: <NEW SEARCH>

Display Reports for:

People

Departments

Projects

Funds

FILTER FUNDS BY:

☐ FAU contains or equals

☐ Fund Title contains or equals

Update Filter

FILTERED RESULTS LIST:

Select All

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

4441450JS|79597|0| (PATHOLOGY AND LAB MEDICINE /UROLOGY)
ACS(CA DIV)RSG-02083-01 REITER12/02 25

4441450JS|79597|3| (PATHOLOGY AND LAB MEDICINE /UROLOGY)
ACS(CA DIV)RSG-02083-01 REITER12/02 25

4441450JS|79597|6| (PATHOLOGY AND LAB MEDICINE /UROLOGY)
ACS(CA DIV)RSG-02083-01 REITER12/02 25

4441336JS|57630|0| (MEDICINE-GERIATRICS)
ABT/HHS 13562 SCHNELLE 06/06 26%

4441336JS|57630|2| (MEDICINE-GERIATRICS)
ABT/HHS 13562 SCHNELLE 06/06 26%

4441336JS|57630|3| (MEDICINE-GERIATRICS)

SEARCH COLLECTION:

Remove All

Click an item to remove it from the collection:

-

0 funds in collection.

SAVE...

SAVE AS...

VIEW...

Creating New Searches

The system does not limit the results returned on the list to that which you have permission to view.

However, if you are not authorized to view the information you specified in your search, you will not be able to access the results on the report you have created.

How To Create a Search

- Decide if you are searching by **people**, **department**, **project** or **fund** and click on the appropriate tab.
- Enter your search criteria in the **Filter By** panel and click the **Update Filter** button. The system will display a list of matching entries from the database.
- Select the item(s) from the filtered results list to move them to the search criteria collection. The criteria in the collection will be saved and used to find matching effort reports.
- Run the search by clicking the View button, or save the search by clicking the save button.
- Review/edit the search.

The next several slides illustrate each step doing a **department** search.

Department Search

Click on the
Departments tab.

UNIVERSITY of CALIFORNIA

Effort Reporting System

User: GRAGYRU DONN (333520644) | [Account Settings](#) | [Sign-Out](#)

[Return to Report List](#)

EDIT SAVED SEARCH: <NEW SEARCH> ?

Display Reports for:

People

Departments

Projects

Funds

FILTER FUNDS BY:

☐ FAU contains or equals

☐ Fund Title contains or equals

Update Filter

FILTERED RESULTS LIST:

Select All

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

4441450JS|79597|0| (PATHOLOGY AND LAB MEDICINE /UROLOGY)
ACS(CA DIV)RSG-02083-01 REITER12/02 25

4441450JS|79597|3| (PATHOLOGY AND LAB MEDICINE /UROLOGY)
ACS(CA DIV)RSG-02083-01 REITER12/02 25

4441450JS|79597|6| (PATHOLOGY AND LAB MEDICINE /UROLOGY)
ACS(CA DIV)RSG-02083-01 REITER12/02 25

4441336JS|57630|0| (MEDICINE-GERIATRICS)
ABT/HHS 13562 SCHNELLE 06/06 26%

4441336JS|57630|2| (MEDICINE-GERIATRICS)
ABT/HHS 13562 SCHNELLE 06/06 26%

4441336JS|57630|3| (MEDICINE-GERIATRICS)

SEARCH COLLECTION:

Remove All

Click an item to remove it from the collection:

-

0 funds in collection.

SAVE...

SAVE AS...

VIEW...

Department Search

Enter **Filter By**
criteria, e.g.,:

Department type:
Home Department

**Department
name or number
contains:** "en"

Click the **Update
Filter** button.

UNIVERSITY of CALIFORNIA

Effort Reporting System

User: GRAGYRU DONN (333520644) | [Account Settings](#) | [Sign-Out](#)

[Return to Report List](#)

EDIT SAVED SEARCH: <NEW SEARCH>

Display Reports for:

People

Departments

Projects

Funds

FILTER DEPARTMENTS BY:

Choose department type: Fund Department

☐ Department name or number contains:

Home Department

Account Department

Fund Department

Update Filter

FILTERED RESULTS LIST:

Select All

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

ACADEMIC ADVANCEMENT PROGRAM
052300

ACADEMIC SENATE
535000

AMERICAN INDIAN STUDIES CENTER
204500

ANDERSON GRAD SCH OF MANAGEMEN
030000

ASIAN AMERICAN STUDIES CENTER
206000

ATMOSPHERIC AND OCEANIC SCIENC
096500

BIOENGINEERING DEPARTMENT
012500

SEARCH COLLECTION:

Remove All

Click an item to remove it from the collection:

-

0 departments in collection.

SAVE...

SAVE AS...

VIEW...

Department Search

ERS lists results of the search in the **Filtered Results List**.

Note that the results contain departments with the letters "en" in the department name.

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[Return to Report List](#)

EDIT SAVED SEARCH: <NEW SEARCH> ?

Display Reports for:

People Departments Projects Funds

FILTER DEPARTMENTS BY:

Choose department type: Home Department

☒ Department name or number contains or equals en

Update Filter

FILTERED RESULTS LIST: Select All

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

| | |
|--|---|
| ACADEMIC ADVANCEMENT PROGRAM 052300 | ▶ |
| ACADEMIC SENATE 535000 | ▶ |
| AMERICAN INDIAN STUDIES CENTER 204500 | ▶ |
| ANDERSON GRAD SCH OF MANAGEMEN 030000 | ▶ |
| ASIAN AMERICAN STUDIES CENTER 206000 | ▶ |
| ATMOSPHERIC AND OCEANIC SCIENC 096500 | ▶ |
| BIOENGINEERING DEPARTMENT 012500 | ▶ |

SEARCH COLLECTION: Remove All

Click an item to remove it from the collection:

-

0 departments in collection.

SAVE... SAVE AS... VIEW...

Department Search

Select items you wish to appear in your search using one of two methods:

- Click the **Select All** button to get all results, or
- Click the **blue wedge** associated with an entry to add individual items to your search collection.

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Effort Reporting System

User: GRAGYRU DONN (333520644) | [Account Settings](#) | [Sign-Out](#)

[Return to Report List](#)

EDIT SAVED SEARCH: <NEW SEARCH>

Display Reports for:

People

Departments

Projects

Funds

FILTER DEPARTMENTS BY:

Choose department type: Home Department

☒ Department name or number contains or equals en

Update Filter

FILTERED RESULTS LIST:

Select All

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

| | |
|--|---|
| ACADEMIC ADVANCEMENT PROGRAM 052300 | ▶ |
| ACADEMIC SENATE 535000 | ▶ |
| AMERICAN INDIAN STUDIES CENTER 204500 | ▶ |
| ANDERSON GRAD SCH OF MANAGEMEN 030000 | ▶ |
| ASIAN AMERICAN STUDIES CENTER 206000 | ▶ |
| ATMOSPHERIC AND OCEANIC SCIENC 096500 | ▶ |
| BIOENGINEERING DEPARTMENT 012500 | ▶ |

SEARCH COLLECTION:

Remove All

Click an item to remove it from the collection:

-

0 departments in collection.

SAVE... SAVE AS... VIEW...

Department Search

ERS moves whatever you selected from the **Filtered Results List** into the **Search Collections** "bucket".

UNIVERSITY of CALIFORNIA

Effort Reporting System

User: GRAGYRU DONN (333520644) | [Account Settings](#) | [Sign-Out](#)

[Return to Report List](#)

EDIT SAVED SEARCH: <NEW SEARCH>

Display Reports for:

PeopleDepartmentsProjectsFunds

FILTER DEPARTMENTS BY:

Choose department type: Home Department

☒ Department name or number contains or equals en

Update Filter

FILTERED RESULTS LIST:Select All

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

| | |
|--|---|
| ACADEMIC ADVANCEMENT PROGRAM 052300 | ▶ |
| ACADEMIC SENATE 535000 | ▶ |
| AMERICAN INDIAN STUDIES CENTER 204500 | ▶ |
| ANDERSON GRAD SCH OF MANAGEMEN 030000 | ▶ |
| ASIAN AMERICAN STUDIES CENTER 206000 | ▶ |
| ATMOSPHERIC AND OCEANIC SCIENC 096500 | ▶ |
| BIOENGINEERING DEPARTMENT 012500 | ▶ |
| BOTANICAL GARDENS | ▶ |

SEARCH COLLECTION:Remove All

Click an item to remove it from the collection:

| | |
|---|--|
| ◀ | ACADEMIC ADVANCEMENT PROGRAM 052300 |
| ◀ | ACADEMIC SENATE 535000 |
| ◀ | ATMOSPHERIC AND OCEANIC SCIENC 096500 |
| ◀ | BIOENGINEERING DEPARTMENT 012500 |

4 departments in collection.

SAVE...SAVE AS...VIEW...

Department Search

You may remove entries as follows:

- Click the **Remove All** button to remove all entries; or
- Click a **blue wedge** associated with an entry to remove individual items.

[Return to Report List](#)

EDIT SAVED SEARCH: <NEW SEARCH> ?

Display Reports for:

People Departments Projects Funds

FILTER DEPARTMENTS BY:

Choose department type: Home Department

☒ Department name or number contains or equals en

Update Filter

FILTERED RESULTS LIST: Select All

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

| | |
|--|---|
| ACADEMIC ADVANCEMENT PROGRAM 052300 | ▶ |
| ACADEMIC SENATE 535000 | ▶ |
| AMERICAN INDIAN STUDIES CENTER 204500 | ▶ |
| ANDERSON GRAD SCH OF MANAGEMEN 030000 | ▶ |
| ASIAN AMERICAN STUDIES CENTER 206000 | ▶ |
| ATMOSPHERIC AND OCEANIC SCIENC 096500 | ▶ |
| BIOENGINEERING DEPARTMENT 012500 | ▶ |
| BOTANICAL GARDENS 092000 | ▶ |
| CAMPUS MAINTENANCE 342500 | ▶ |

SEARCH COLLECTION: Remove All

Click an item to remove it from the collection:

| | |
|---|--|
| ◀ | ACADEMIC ADVANCEMENT PROGRAM 052300 |
| ◀ | ACADEMIC SENATE 535000 |
| ◀ | ATMOSPHERIC AND OCEANIC SCIENC 096500 |
| ◀ | BIOENGINEERING DEPARTMENT 012500 |

4 departments in collection.

SAVE... SAVE AS... VIEW...

Saving Searches

Review the saved search.

If it meets your expectations, either view the results by clicking the View button or save the search by clicking the **Save** button

PeopleDepartmentsProjectsFunds

FILTER DEPARTMENTS BY:

Choose department type: Home Department

☒ Department name or number contains or equals en

Update Filter

FILTERED RESULTS LIST:

Select All

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

| | |
|--|---|
| ACADEMIC ADVANCEMENT PROGRAM 052300 | ▶ |
| ACADEMIC SENATE 535000 | ▶ |
| AMERICAN INDIAN STUDIES CENTER 204500 | ▶ |
| ANDERSON GRAD SCH OF MANAGEMEN 030000 | ▶ |
| ASIAN AMERICAN STUDIES CENTER 206000 | ▶ |
| ATMOSPHERIC AND OCEANIC SCIENC 096500 | ▶ |
| BIOENGINEERING DEPARTMENT 012500 | ▶ |
| BOTANICAL GARDENS 092000 | ▶ |
| CAMPUS MAINTENANCE 342500 | ▶ |
| CANCER PREVENTION & CNTRL RESE 191600 | ▶ |
| CAREER CENTER 506000 | ▶ |
| CENTER FOR 17TH & 18TH CENTURY | ▶ |

SEARCH COLLECTION:

Remove All

Click an item to remove it from the collection:

| | |
|---|--|
| ◀ | ACADEMIC ADVANCEMENT PROGRAM 052300 |
| ◀ | ACADEMIC SENATE 535000 |
| ◀ | ATMOSPHERIC AND OCEANIC SCIENC 096500 |
| ◀ | BIOENGINEERING DEPARTMENT 012500 |

4 departments in collection.

SAVE...

SAVE AS...

VIEW...

Saving Searches

If you click save, a dialogue box appears requesting that you name your search.

- Enter a name that has meaning to you.
- Click the **“Display report list after saving”** box if you wish to see your displayed report.
- Click the **Save** button to save. Or click the **Cancel** button to cancel.

The screenshot shows a web application interface with tabs for 'People', 'Departments', 'Projects', and 'Funds'. The 'Departments' tab is active. Below the tabs is a section titled 'FILTER DEPARTMENTS BY:' with a 'Choose department type:' label. A checkbox is checked, and the text 'Department name or number contains or equals' is followed by a text input field containing 'en'. To the right of this section are 'Update Filter' and 'Remove All' buttons. Below this is a 'FILTERED RESULTS LIST:' section. It contains a list of departments with their names and numbers, and a list of departments with their names and numbers. At the bottom of the list, it says '4 departments in collection.' and there are 'SAVE...', 'SAVE AS...', and 'VIEW...' buttons. A 'SAVE SEARCH' dialog box is overlaid on the interface. It has a title bar with 'SAVE SEARCH' and a blue icon. The main text says 'Please enter a name for your search:'. There is a text input field containing 'EN List'. Below the input field is a checkbox labeled 'Display report list after saving.' At the bottom of the dialog box are 'CANCEL' and 'SAVE' buttons.

| Department Name | Department Number |
|--------------------------------|-------------------|
| ACADEMIC ADVANCEMENT PROGRAM | 052300 |
| ACADEMIC SENATE | 535000 |
| AMERICAN INDIAN STUDIES CENTER | 204500 |
| ANDERSON GRAD SCH OF MANAGEMEN | 030000 |
| ASIAN AMERICAN STUDIES CENTER | 206000 |
| ATMOSPHERIC AND OCEANIC SCIENC | 096500 |
| BIOENGINEERING DEPARTMENT | 012500 |
| BOTANICAL GARDENS | 092000 |
| CAMPUS MAINTENANCE | 342500 |
| CANCER PREVENTION & CNTRL RESE | 191600 |
| CAREER CENTER | 506000 |
| CENTER FOR 17TH & 18TH CENTURY | |

Saved Query Results

The “En” list has been saved and is now displayed as “En List”.
















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Effort Reporting System

User: GRAGYRU DONN (333520644) | [Account Settings](#) | [Sign-Out](#)

[Return to Report List](#)

MANAGE SAVED SEARCHES

| | Name | Default | Created by | Last Modified |
|---|-----------------------------------|----------------------------------|--------------|---------------|
|  | Ad-hoc query | | | 01/30/2006 |
|  | My Effort Reports | <input checked="" type="radio"/> | GRAGYRU DONN | 01/25/2006 |
|  | My Projects | <input type="radio"/> | GRAGYRU DONN | 01/25/2006 |
|     | Core Team | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |
|     | Cost Sharing | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |
|     | EN List | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |

Other Saved Search Options

| | |
|----------------------------------|---|
| <input checked="" type="radio"/> | When entering ERS, display my default search as defined above. |
| <input type="radio"/> | When entering ERS, display the Search page. |
| <input type="radio"/> | When entering ERS, display the the search results from my last session. |

CREATE NEW SEARCH...

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Managing Searches

Once you create and save a search, you have the option of **editing, sharing or deleting** the Saved Search.













UNIVERSITY of CALIFORNIA

Effort Reporting System

User: GRAGYRU DONN (333520644) | [Account Settings](#) | [Sign-Out](#)

[Return to Report List](#)

MANAGE SAVED SEARCHES

| | Name | Default | Created by | Last Modified |
|---|-----------------------------------|----------------------------------|--------------|---------------|
|  | Ad-hoc query | | | 01/30/2006 |
|  | My Effort Reports | <input checked="" type="radio"/> | GRAGYRU DONN | 01/25/2006 |
|  | My Projects | <input type="radio"/> | GRAGYRU DONN | 01/25/2006 |
|    | Core Team | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |
|    | Cost Sharing | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |
|    | EN List | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |

Other Saved Search Options

| | | |
|----------------------------------|---|--|
| <input checked="" type="radio"/> | When entering ERS, display my default search as defined above. | |
| <input type="radio"/> | When entering ERS, display the Search page. | |
| <input type="radio"/> | When entering ERS, display the the search results from my last session. | |

CREATE NEW SEARCH...

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Editing Saved Searches

Click this icon to **edit** your previously saved search.
















UNIVERSITY of CALIFORNIA

Effort Reporting System

User: GRAGYRU DONN (333520644) | [Account Settings](#) | [Sign-Out](#)

[Return to Report List](#)

MANAGE SAVED SEARCHES

| | Name | Default | Created by | Last Modified |
|---|-----------------------------------|----------------------------------|--------------|---------------|
|  | Ad-hoc query | | | 01/30/2006 |
|  | My Effort Reports | <input checked="" type="radio"/> | GRAGYRU DONN | 01/25/2006 |
|  | My Projects | <input type="radio"/> | GRAGYRU DONN | 01/25/2006 |
|     | Core Team | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |
|     | Cost Sharing | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |
|     | EN List | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |

Edit Saved Search

| Other Saved Search Defaults | | | |
|-----------------------------|---|----------------------------------|--|
| | When entering ERS, display my default search as defined above. | <input checked="" type="radio"/> | |
| | When entering ERS, display the Search page. | <input type="radio"/> | |
| | When entering ERS, display the the search results from my last session. | <input type="radio"/> | |

CREATE NEW SEARCH...

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Editing Saved Searches

ERS retrieves the Saved Search original criteria. You may edit, save and view.

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Effort Reporting System

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[Return to Manage Saved Searches](#)

EDIT SAVED SEARCH: **ENLIST**

Display Reports for:

People

Departments

Projects

Funds

FILTER DEPARTMENTS BY:

Department type: Home Department

☐ Department name or number contains or equals

Update Filter

FILTERED RESULTS LIST:

Select All

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

| | |
|--|---|
| ACAD GERIATRICS RES PRGR 820500 | ▶ |
| ACADEMIC ADVANCEMENT PROGRAM 052300 | ▶ |
| ACADEMIC PERSONNEL 381200 | ▶ |
| ACADEMIC PERSONNEL 864000 | ▶ |
| ACADEMIC PLANNING & BUDGET 381500 | ▶ |
| ACADEMIC SENATE 535000 | ▶ |
| ACADEMIC TECHNOLOGY SERVICES 220000 | ▶ |

SEARCH COLLECTION:

Remove All

Click an item to remove it from the collection:

| | |
|---|--|
| ◀ | ACADEMIC ADVANCEMENT PROGRAM 052300 |
| ◀ | ACADEMIC SENATE 535000 |
| ◀ | ATMOSPHERIC AND OCEANIC SCIENC 096500 |
| ◀ | BIOENGINEERING DEPARTMENT 012500 |

4 departments in collection.

SAVE...

SAVE AS...

VIEW...

Sharing Saved Searches

Click this icon to **share** your previously saved search.

UNIVERSITY of CALIFORNIA

Effort Reporting System

User: GRAGYRU DONN (333520644) | [Account Settings](#) | [Sign-Out](#)

[Return to Report List](#)

MANAGE SAVED SEARCHES

| | Name | Default | Created by | Last Modified |
|--|-----------------------------------|----------------------------------|--------------|---------------|
| | Ad-hoc query | | | 01/30/2006 |
| | My Effort Reports | <input checked="" type="radio"/> | GRAGYRU DONN | 01/25/2006 |
| | My Projects | <input type="radio"/> | GRAGYRU DONN | 01/25/2006 |
| | Core Team | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |
| | Cost Sharing | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |
| | EN List | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |

Other Saved Search Options

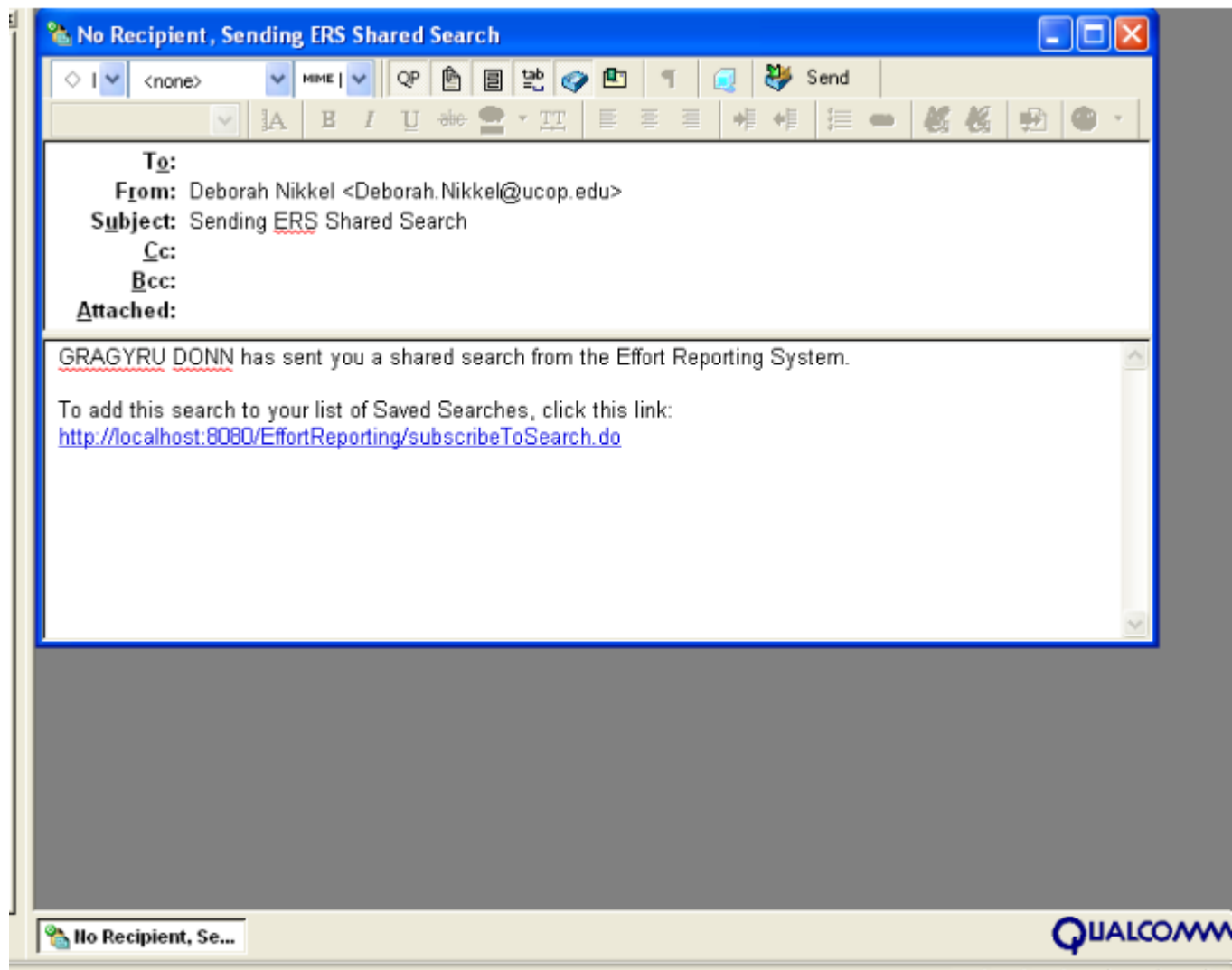
| | | | |
|--|---|----------------------------------|--|
| | When entering ERS, display my default search as defined above. | <input checked="" type="radio"/> | |
| | When entering ERS, display the Search page. | <input type="radio"/> | |
| | When entering ERS, display the the search results from my last session. | <input type="radio"/> | |

CREATE NEW SEARCH...

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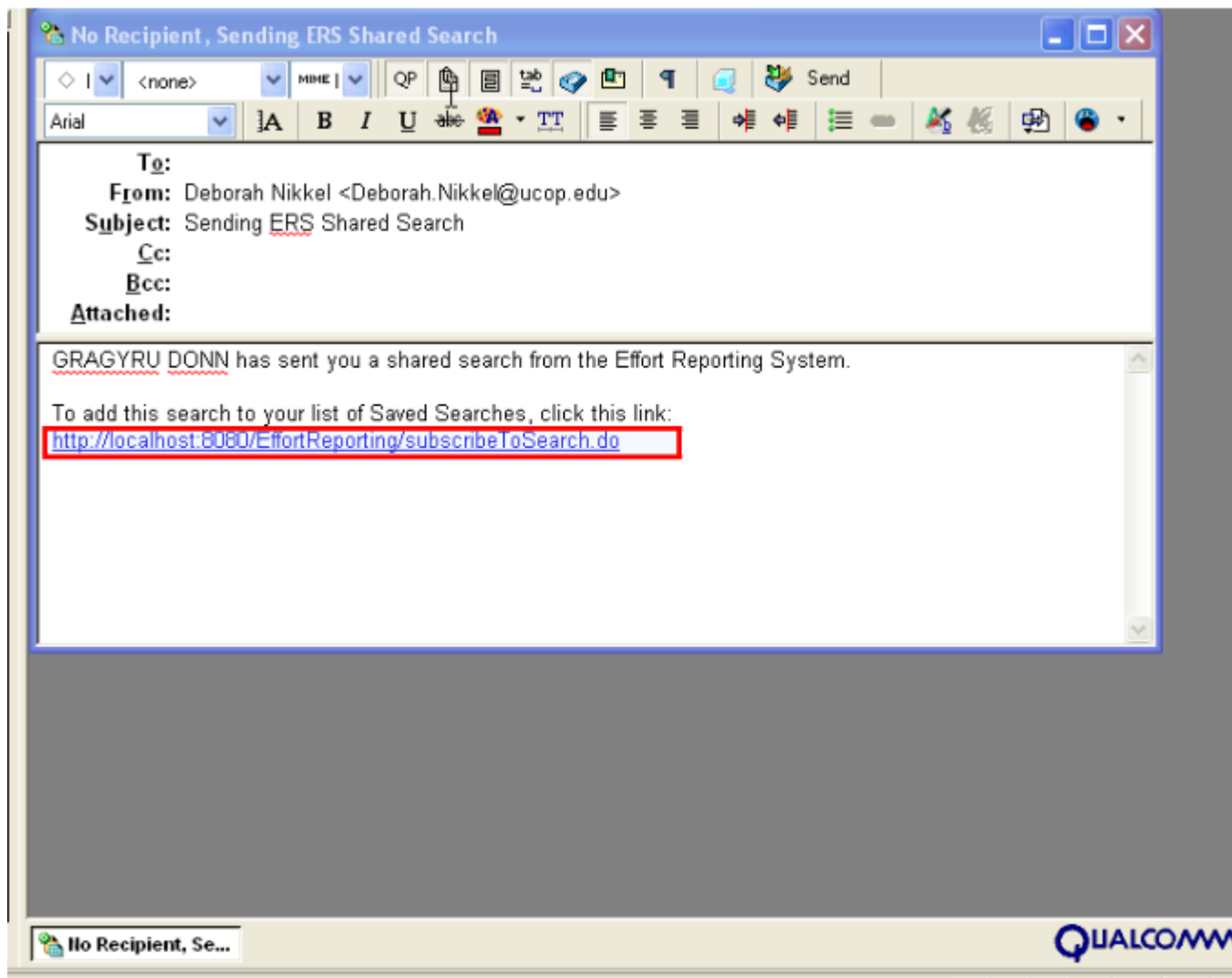
Sharing Saved Searches

ERS connects with your email program and generates an email. Enter the email address of the individual with whom you wish to share the saved search; write an additional message, if desired and then send.



Sharing Saved Searches

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 logon if you are not already logged on.



Sharing Saved Searches

When you accept the search, it will be added to your personal list of searches which is visible on the Manage Saved Searches page.

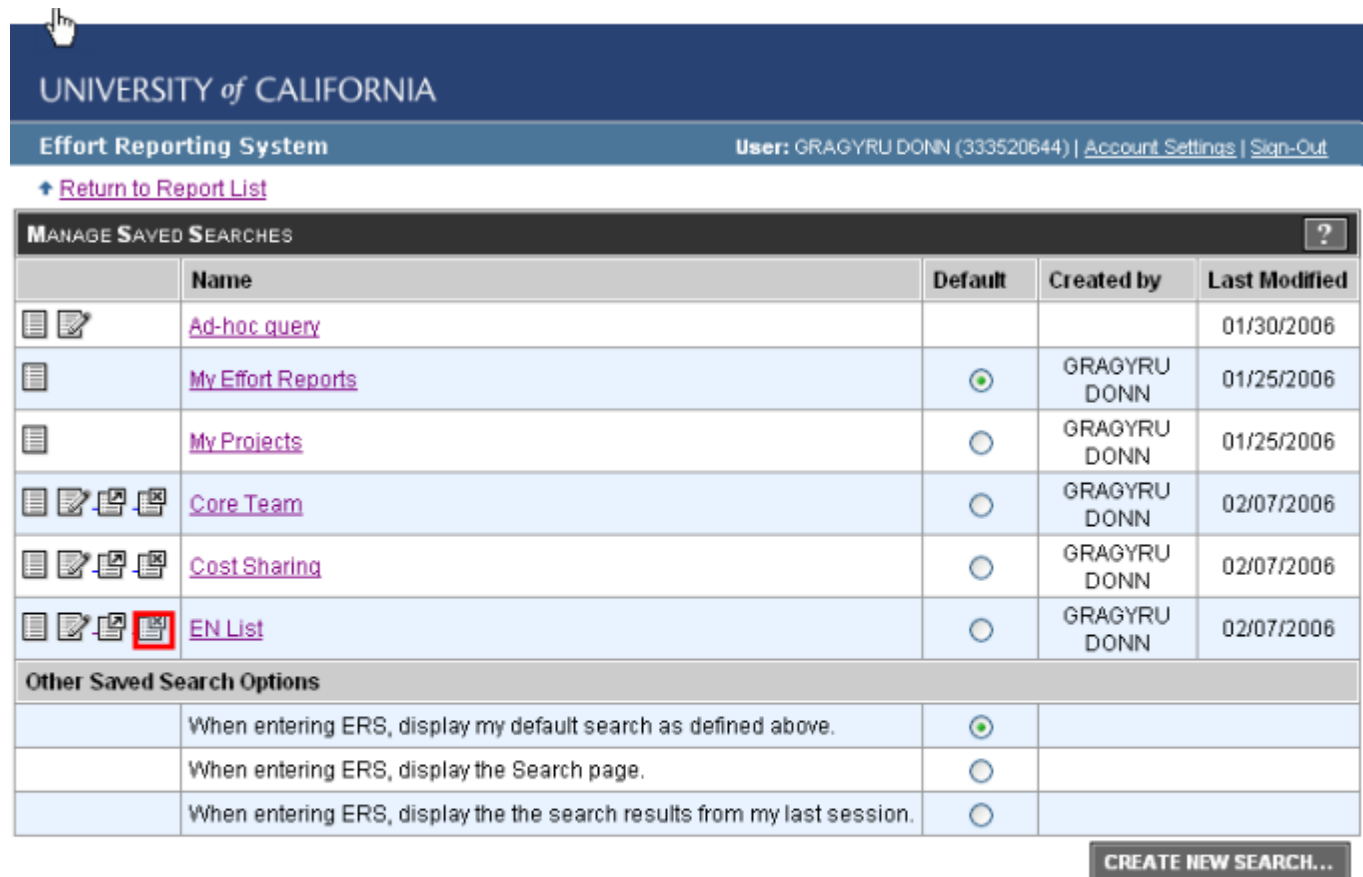
The person who sent you the search remains its owner. They can modify the search and you will automatically receive their changes with no action needed on your part.

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 which was shared with you, you will be given a private copy of that search and will no longer be linked to the original search that was sent to you.

Deleting Saved Searches

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.



















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Effort Reporting System User: GRAGYRU DONN (333520644) | [Account Settings](#) | [Sign-Out](#)

[Return to Report List](#)

MANAGE SAVED SEARCHES ?

| | Name | Default | Created by | Last Modified |
|---|-----------------------------------|----------------------------------|--------------|---------------|
|   | Ad-hoc query | | | 01/30/2006 |
|  | My Effort Reports | <input checked="" type="radio"/> | GRAGYRU DONN | 01/25/2006 |
|  | My Projects | <input type="radio"/> | GRAGYRU DONN | 01/25/2006 |
|     | Core Team | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |
|     | Cost Sharing | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |
|     | EN List | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |

Other Saved Search Options

| | | | |
|-----------------------|---|----------------------------------|--|
| <input type="radio"/> | When entering ERS, display my default search as defined above. | <input checked="" type="radio"/> | |
| <input type="radio"/> | When entering ERS, display the Search page. | <input type="radio"/> | |
| <input type="radio"/> | When entering ERS, display the the search results from my last session. | <input type="radio"/> | |

CREATE NEW SEARCH...

Managing Effort Report Lists

You can work with report lists and saved searches using the tools in the highlighted section.

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Effort Reporting System

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EFFORT REPORT LIST

Display Saved Search: My Projects Manage Searches... Create New...

Reporting Periods: ☒ All ☐ Select: Winter 04/05 11/12 Academics

REPORT LIST FOR: **My PROJECTS**

Export List Send List Print List

| Period | For | Last Modified | Status |
|------------------------------|--|-------------------|----------------------|
| Winter 04/05 11/12 Academics | AEGORAN FARNINDAZ ,IRINTZI (938610243) | 02/07/2006 - v2.2 | Open-Reopened |
| Winter 04/05 11/12 Academics | CLIRK,INDRAW (534334615) | 02/03/2006 - v1.0 | Open |
| Winter 04/05 11/12 Academics | CYWGELL,BORTYN Y (733252545) | 02/03/2006 - v1.0 | Open |
| Winter 04/05 11/12 Academics | KOHN,THYMIS (134894609) | 02/03/2006 - v1.0 | Open |
| Winter 04/05 11/12 Academics | KRODUSZ,MIRGIRAT I (534356306) | 02/03/2006 - v1.0 | Open |
| Winter 04/05 11/12 Academics | MEGOAL,INTYNEY HYRICEY (638637770) | 02/06/2006 - v2.0 | Certified/AdjustReqd |
| Winter 04/05 11/12 Academics | MILDYNIDY,RETI RIGOAL (138660204) | 02/03/2006 - v1.0 | Open |
| Winter 04/05 11/12 Academics | PARLMIN,DABYRIH G (034819561) | 02/03/2006 - v1.0 | Open |
| Winter 04/05 11/12 Academics | SCHOSTAR,MIRK I (533593588) | 02/03/2006 - v1.0 | Open |
| Winter 04/05 11/12 Academics | SON,DYNG (838615773) | 02/03/2006 - v1.0 | Open |

Display 20 reports per page

displaying 1 to 10 (10 total)

Display Saved Search

Display Saved

Search: when you click on the drop down menu ERS will display a list of all of your previously saved searches.

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








EFFORT REPORT LIST ?

Display Saved Search: My Projects Manage Searches... Create New...

Reporting Periods: ☒ All ☐ Select: Winter 04/05 11/12 Academics

REPORT LIST FOR: My Projects

Period of

| | | | Last Modified | Status |
|---|------------------------------|--|-------------------|----------------------|
|  | Winter 04/05 11/12 Academics | AEGORAN FARNINDAZ, IRINTZI (938610243) | 02/07/2006 - v2.2 | Open-Reopened |
|  | Winter 04/05 11/12 Academics | CLIRK,INDRAW (534334615) | 02/03/2006 - v1.0 | Open |
|  | Winter 04/05 11/12 Academics | CYWGELL,BORTYN Y (733252545) | 02/03/2006 - v1.0 | Open |
|  | Winter 04/05 11/12 Academics | KOHN,THYMIS (134894609) | 02/03/2006 - v1.0 | Open |
|  | Winter 04/05 11/12 Academics | KRODUSZ,MIRGIRAT I (534356306) | 02/03/2006 - v1.0 | Open |
|  | Winter 04/05 11/12 Academics | MEGOAL,INTYNEY HYRICEY (638637770) | 02/06/2006 - v2.0 | Certified/AdjustReqd |
|  | Winter 04/05 11/12 Academics | MILDYNIDY,RETI RIQOAL (138660204) | 02/03/2006 - v1.0 | Open |
|  | Winter 04/05 11/12 Academics | PARLMIN,DABYRIH G (034819561) | 02/03/2006 - v1.0 | Open |
|  | Winter 04/05 11/12 Academics | SCHOSTAR,MIRK I (533593588) | 02/03/2006 - v1.0 | Open |
|  | Winter 04/05 11/12 Academics | SON,DYNG (838615773) | 02/03/2006 - v1.0 | Open |

Display 20 reports per page

displaying 1 to 10 (10 total)

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Manage Searches

When you click on the **Manage Searches...** button ERS will take you to the **Manage Saved Searches** screen where you will see a list of your previously saved searches.

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Effort Reporting System

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EFFORT REPORT LIST

Display Saved Search: EN List Manage Searches... Create New...

Reporting Periods: ☒ All ☐ Select: Winter 04/05 11/12 Academics

REPORT LIST FOR: **ENLIST**

Export List Send List Print List

| Period | For | Last Modified | Status |
|------------------------------|---------------------------------------|-------------------|-------------------|
| Summer 04/05 11/12 Academics | SO,HOE (038501366) | 01/30/2006 - v1.0 | Exception/Overdue |
| Winter 04/05 9/12 Academics | HIMISKE,TYSHEKIZO (534322296) | 01/09/2006 - v1.0 | Open/Overdue |
| Winter 04/05 11/12 Academics | BEGGARSTIFF,MYRGIN SHIUNA (534896806) | 02/03/2006 - v1.0 | Open |
| Winter 04/05 11/12 Academics | BIRKAU,BREIN (838193753) | 02/03/2006 - v1.0 | Open |
| Winter 04/05 11/12 Academics | BYODYOREDES,ITHINISEYS (334391940) | 02/03/2006 - v1.0 | Open |
| Winter 04/05 11/12 Academics | BYRTNEK,JICYB (334479231) | 02/03/2006 - v1.0 | Open |
| Winter 04/05 11/12 Academics | CHAN,DINNE (334806386) | 02/03/2006 - v1.0 | Open |
| Winter 04/05 11/12 Academics | CHAN,UYNG (238544779) | 02/03/2006 - v1.0 | Open |
| Winter 04/05 11/12 Academics | CHEAN,IE-CHE (938643824) | 02/03/2006 - v1.0 | Open |
| Winter 04/05 11/12 Academics | CHILI,CHRESTENI G. (338645859) | 02/03/2006 - v1.0 | Open |
| Winter 04/05 11/12 Academics | CHYE,HUY-JECK (034090686) | 02/03/2006 - v1.0 | Open |

Manage Saved Searches

Here is the list of previously saved searches for this user. Note that the four reports listed are the same reports that appeared on the drop down menu on the Display List.







UNIVERSITY of CALIFORNIA

Effort Reporting System

User: GRAGYRU DONN (333520644) | [Account Settings](#) | [Sign-Out](#)

[Return to Report List](#)

MANAGE SAVED SEARCHES

| | Name | Default | Created by | Last Modified |
|---|-----------------------------------|----------------------------------|--------------|---------------|
|  | Ad-hoc query | | | 01/30/2006 |
|  | My Effort Reports | <input checked="" type="radio"/> | GRAGYRU DONN | 01/25/2006 |
|  | My Projects | <input type="radio"/> | GRAGYRU DONN | 01/25/2006 |
|  | Core Team | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |
|  | Cost Sharing | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |
|  | EN List | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |

Other Saved Search Options

| | | | |
|--|---|----------------------------------|--|
| | When entering ERS, display my default search as defined above. | <input checked="" type="radio"/> | |
| | When entering ERS, display the Search page. | <input type="radio"/> | |
| | When entering ERS, display the the search results from my last session. | <input type="radio"/> | |

CREATE NEW SEARCH...

Setting Default Report List

ERS provides the option of specifying what Saved Search will appear, by default, when you logon.

Setting the default report involves a simple process:

- Click on the **Manage Searches** button.
- Select the **Saved Search** report list you wish to appear when you logon.
- Click the button associated with your selection in the **Default** column.

Let's look at each step in more detail.

Setting Default Report List

Step 1: From the Effort Report List screen, click on the **Manage Searches** button to go to the Manage Saved Searches screen.

UNIVERSITY of CALIFORNIA

Effort Reporting System

User: GRAGYRU DONN (333520644) | [Account Settings](#) | [Sign-Out](#)

EFFORT REPORT LIST

Display Saved Search:

Manage Searches...

Create New...

Reporting Periods: ☒ All ☐ Select:

REPORT LIST FOR: **ENLIST**

Export List

Send List

Print List

| Period ▾ | For | Last Modified | Status |
|--|---------------------------------------|-------------------|-------------------|
| <div></div> Summer 04/05 11/12 Academics | SO,HOE (038501366) | 01/30/2006 - v1.0 | Exception/Overdue |
| <div></div> Winter 04/05 9/12 Academics | HIMISIKE,TYSHEKIZO (534322296) | 01/09/2006 - v1.0 | Open/Overdue |
| <div></div> Winter 04/05 11/12 Academics | BEGGARSTIFF,MYRGIN SHIUNA (534896806) | 02/03/2006 - v1.0 | Open |
| <div></div> Winter 04/05 11/12 Academics | BIRKAU,BREIN (838193753) | 02/03/2006 - v1.0 | Open |
| <div></div> Winter 04/05 11/12 Academics | BYODYOREDES,ITHINISEYS (334391940) | 02/03/2006 - v1.0 | Open |
| <div></div> Winter 04/05 11/12 Academics | BYRTNEK,JICYB (334479231) | 02/03/2006 - v1.0 | Open |
| <div></div> Winter 04/05 11/12 Academics | CHAN,DINNE (334806386) | 02/03/2006 - v1.0 | Open |
| <div></div> Winter 04/05 11/12 Academics | CHAN,UYNG (238544779) | 02/03/2006 - v1.0 | Open |
| <div></div> Winter 04/05 11/12 Academics | CHEAN,IE-CHE (938643824) | 02/03/2006 - v1.0 | Open |
| <div></div> Winter 04/05 11/12 Academics | CHILI,CHRESTENI G. (338645859) | 02/03/2006 - v1.0 | Open |
| <div></div> Winter 04/05 11/12 Academics | CHYE,HUY-JECK (034090686) | 02/03/2006 - v1.0 | Open |

Setting Default Report List

Previously saved searches are listed in the top half of the screen. For each search, ERS shows a name, who created it and when it was last modified.
















UNIVERSITY of CALIFORNIA

Effort Reporting System

User: GRAGYRU DONN (333520644) | [Account Settings](#) | [Sign-Out](#)

[Return to Report List](#)

MANAGE SAVED SEARCHES

| | Name | Default | Created by | Last Modified |
|--|-----------------------------------|----------------------------------|--------------|---------------|
|  | Ad-hoc query | | | 01/30/2006 |
|  | My Effort Reports | <input checked="" type="radio"/> | GRAGYRU DONN | 01/25/2006 |
|  | My Projects | <input type="radio"/> | GRAGYRU DONN | 01/25/2006 |
|     | Core Team | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |
|     | Cost Sharing | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |
|     | EN List | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |

Other Saved Search Options

| | | |
|----------------------------------|---|--|
| <input checked="" type="radio"/> | When entering ERS, display my default search as defined above. | |
| <input type="radio"/> | When entering ERS, display the Search page. | |
| <input type="radio"/> | When entering ERS, display the the search results from my last session. | |

CREATE NEW SEARCH...

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Setting Default Report List

Other Saved Search Options are listed in the lower half of the screen. When entering ERS you have the option to display:

- “My default list as defined above” (i.e., your previously saved search)
- The Search page
- “The search results from my last session.”




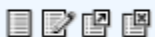


UNIVERSITY of CALIFORNIA

Effort Reporting System

User: GRAGYRU DONN (333520644) | [Account Settings](#) | [Sign-Out](#)

[Return to Report List](#)

MANAGE SAVED SEARCHES

| | Name | Default | Created by | Last Modified |
|---|-----------------------------------|----------------------------------|--------------|---------------|
|  | Ad-hoc query | | | 01/30/2006 |
|  | My Effort Reports | <input checked="" type="radio"/> | GRAGYRU DONN | 01/25/2006 |
|  | My Projects | <input type="radio"/> | GRAGYRU DONN | 01/25/2006 |
|  | Core Team | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |
|  | Cost Sharing | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |
|  | EN List | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |

Other Saved Search Options

| | | |
|----------------------------------|---|--|
| <input checked="" type="radio"/> | When entering ERS, display my default search as defined above. | |
| <input type="radio"/> | When entering ERS, display the Search page. | |
| <input type="radio"/> | When entering ERS, display the the search results from my last session. | |

CREATE NEW SEARCH...

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Done

Setting Default Report List

Step 2: Select the **Saved Search** you wish to appear when you logon.

Choose one of your previously saved searches or select one of the options provided in the **Other Saved Search Options** section.
















UNIVERSITY of CALIFORNIA

Effort Reporting System

User: GRAGYRU DONN (333520644) | [Account Settings](#) | [Sign-Out](#)

[Return to Report List](#)

MANAGE SAVED SEARCHES

| | Name | Default | Created by | Last Modified |
|---|-----------------------------------|----------------------------------|--------------|---------------|
|  | Ad-hoc query | | | 01/30/2006 |
|  | My Effort Reports | <input checked="" type="radio"/> | GRAGYRU DONN | 01/25/2006 |
|  | My Projects | <input type="radio"/> | GRAGYRU DONN | 01/25/2006 |
|     | Core Team | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |
|     | Cost Sharing | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |
|     | EN List | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |

Other Saved Search Options

| | |
|----------------------------------|---|
| <input checked="" type="radio"/> | When entering ERS, display my default search as defined above. |
| <input type="radio"/> | When entering ERS, display the Search page. |
| <input type="radio"/> | When entering ERS, display the the search results from my last session. |

CREATE NEW SEARCH...

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Setting Default Report List

Step 3: To set the default search, click the field associated with that Saved Search in the **Default** column. In this example the Core Team search was selected.

















UNIVERSITY of CALIFORNIA

Effort Reporting System

User: GRAGYRU DONN (333520644) | [Account Settings](#) | [Sign-Out](#)

[Return to Report List](#)

MANAGE SAVED SEARCHES

| | Name | Default | Created by | Last Modified |
|---|-----------------------------------|----------------------------------|--------------|---------------|
|   | Ad-hoc query | | | 01/30/2006 |
|  | My Effort Reports | <input checked="" type="radio"/> | GRAGYRU DONN | 01/25/2006 |
|  | My Projects | <input type="radio"/> | GRAGYRU DONN | 01/25/2006 |
|     | Core Team | <input checked="" type="radio"/> | GRAGYRU DONN | 02/07/2006 |
|     | Cost Sharing | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |
|     | EN List | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |

Other Saved Search Options

| | | |
|----------------------------------|---|--|
| <input checked="" type="radio"/> | When entering ERS, display my default search as defined above. | |
| <input type="radio"/> | When entering ERS, display the Search page. | |
| <input type="radio"/> | When entering ERS, display the the search results from my last session. | |

CREATE NEW SEARCH...

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Setting Default Report List

When you select a previously saved search as your default search, ERS automatically populates the default field in the “**Other Saved Search Options**” that says “When entering ERS, display my default search as defined above.”




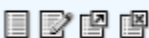


UNIVERSITY of CALIFORNIA

Effort Reporting System

User: GRAGYRU DONN (333520644) | [Account Settings](#) | [Sign-Out](#)

[Return to Manage Saved Searches](#)

MANAGE SAVED SEARCHES

| | Name | Default | Created by | Last Modified |
|---|-----------------------------------|----------------------------------|--------------|---------------|
|  | Ad-hoc query | | | 01/30/2006 |
|  | My Effort Reports | <input type="radio"/> | GRAGYRU DONN | 01/25/2006 |
|  | My Projects | <input checked="" type="radio"/> | GRAGYRU DONN | 01/25/2006 |
|  | Core Team | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |
|  | Cost Sharing | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |
|  | EN List | <input type="radio"/> | GRAGYRU DONN | 02/07/2006 |

Other Saved Search Options

| | | | |
|--|---|----------------------------------|--|
| | When entering ERS, display my default search as defined above. | <input checked="" type="radio"/> | |
| | When entering ERS, display the Search page. | <input type="radio"/> | |
| | When entering ERS, display the the search results from my last session. | <input type="radio"/> | |

CREATE NEW SEARCH...

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Setting Default Report List (cont'd)

The next time you logon ERS will take you to your default Saved Search Report List.

That list will appear at all subsequent logons until the default Saved Search is changed.

The screenshot displays the 'UNIVERSITY of CALIFORNIA Effort Reporting System' interface. At the top, the user is identified as 'GRAGYRU DONN (333520644)' with links for 'Account Settings' and 'Sign-Out'. The main section is titled 'EFFORT REPORT LIST'. A red box highlights the 'Display Saved Search:' dropdown menu, which is currently set to 'Core Team'. To the right of this dropdown are buttons for 'Manage Searches...' and 'Create New...'. Below this, the 'Reporting Periods' are set to 'All' with a 'Select' button and a dropdown menu showing 'Winter 04/05 11/12 Academics'. The 'REPORT LIST FOR: CORE TEAM' section includes buttons for 'Export List', 'Send List', and 'Print List'. A table below shows the report list with columns for 'Period', 'For', 'Last Modified', and 'Status'. The table contains one entry: 'Q1 04/05 - Non-academics' for 'AADS, PIOLI JAIN (738621516)' with a last modified date of '01/11/2006 - v1.2' and a status of 'Not Required'. At the bottom, there is a footer with copyright information: 'copyright 2005 - 2006, The Regents of the University of California, All rights reserved.'

UNIVERSITY of CALIFORNIA

Effort Reporting System User: GRAGYRU DONN (333520644) | [Account Settings](#) | [Sign-Out](#)

EFFORT REPORT LIST ?

Display Saved Search: Core Team Manage Searches... Create New...

Reporting Periods: ☒ All ☐ Select Winter 04/05 11/12 Academics

REPORT LIST FOR: CORE TEAM Export List Send List Print List

| Period | For | Last Modified | Status |
|--------------------------|------------------------------|-------------------|--------------|
| Q1 04/05 - Non-academics | AADS, PIOLI JAIN (738621516) | 01/11/2006 - v1.2 | Not Required |

Display 20 reports per page displaying 1 to 1 (1 total)

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Ad hoc Query

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.

UNIVERSITY of CALIFORNIA

Effort Reporting System

User: System Administrator | [Account Settings](#) | [System Administration](#) | [Sign-Out](#)

[Return to Report List](#)

EDIT SAVED SEARCH: <NEW SEARCH>

Display Reports for:

PeopleDepartments**Projects**Funds

FILTER PROJECTS BY:

☐ Sponsored Project ID contains

☒ Sponsored Project Name contains or equals

☐ Sponsor Award # contains

Update Filter

FILTERED RESULTS LIST:

Select All

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

4-441450/JS-79597 (Sponsor Award #: RSG-02-083-01-LIB)
ACS(CA DIV)RSG-02083-01 REITER12/02 25

4-441336/JS-57630 (Sponsor Award #: 13562)
ABT/HHS 13562 SCHNELLE 06/06 26%

4-621932/-57729 (Sponsor Award #: FY04.108.001)
COLORADO/DHHS 108001 REIFEL 6/05 21.50

4-441329/JF-29738 (Sponsor Award #: RAS U01
A1035040)
FDP-NIH DETELS A135040 3/05 53.50%

4-441350/HB-29738 (Sponsor Award #: RAS U01

SEARCH COLLECTION:

Remove All

Click an item to remove it from the collection:

-

0 projects in collection.

SAVE...SAVE AS...VIEW...

Done

Ad hoc Query

ERS always keeps the last Viewed search you did. You can use your most recent Ad hoc query as your default Report List or you can re-run it anytime by clicking on your **Manage Searches...** button and selecting **Ad hoc query** on your **Manage Saved Searches** List.

UNIVERSITY of CALIFORNIA

Effort Reporting System

User: System Administrator | [Account Settings](#) | [System Administration](#) | [Sign-Out](#)

EFFORT REPORT LIST

Display Saved Search: Ad-hoc query [Manage Searches...](#) [Create New...](#)

Reporting Periods: ☒ All ☐ Select: Winter 04/05 11/12 Academics

REPORT LIST FOR: AD-HOC QUERY

[Export List](#) [Send List](#) [Print List](#)

| Period ▾ | For | Last Modified | Status |
|------------------------------|--------------------------------------|-------------------------------|------------------------|
| Winter 04/05 11/12 Academics | FIHAU,JYHN L (230874223) | 02/03/2006 - v1.0 | Exception |
| Winter 04/05 11/12 Academics | JIMEASYN-KIRIYDEN,BATH D (733905856) | 02/03/2006 - v1.0 | Open |

Display 10 reports per page

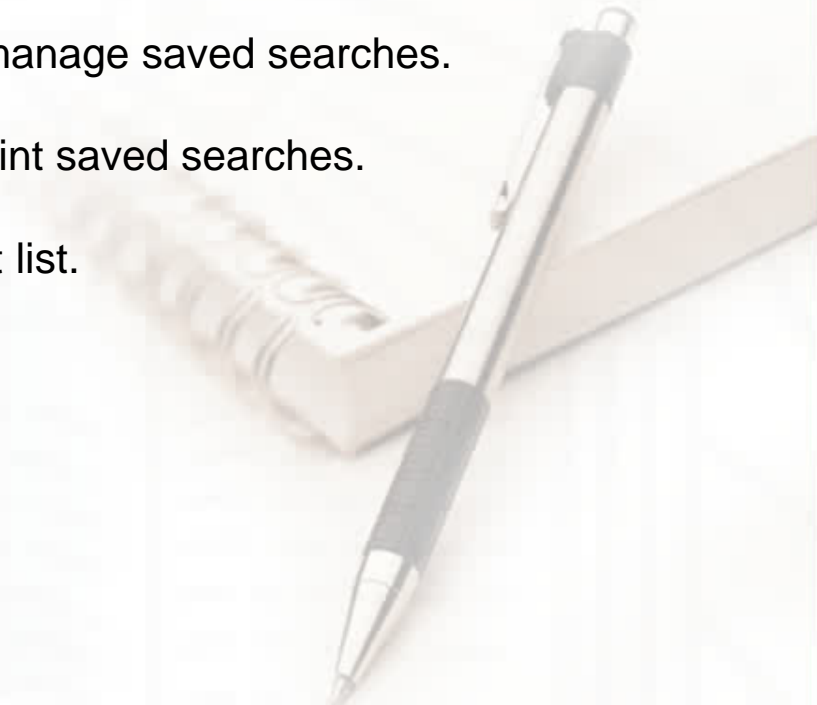
displaying 1 to 2 (2 total)

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<http://ucop010107.ucop.edu:9080/EffortReporting/manageReportLists.do>

Conclusion

This concludes the Creating Searches module. In this module, you learned how to:

- Create new searches using filtering options by people, department, fund and project.
 - View, save, display and manage saved searches.
 - Edit, share, delete and print saved searches.
 - Set up your default report list.
- 
- A silver pen with a black grip and a small notepad with a spiral binding are resting on a white document. The document has some faint, illegible text on it. The background of the slide is a light blue gradient with a faint map of California on the left side.