

ERS REPORT SHARING

Revised March 8, 2010

WHEN IS REPORT SHARING NECESSARY?

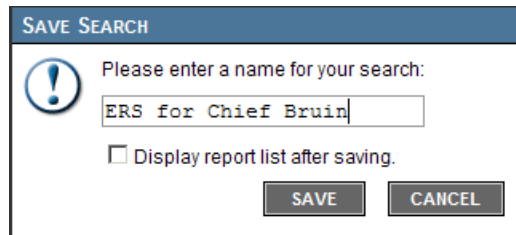
1. An Alternate Certifier needs to certify reports that do not appear under their "My Projects" list.
2. A Division Chief needs to certify reports for employees who have left UCLA.

NOTE: Access to ERS reports for the Alternate Certifier/Division Chief should be established PRIOR to Report Sharing. Access is requested via [reconciliation spreadsheet](#) using justification #1.

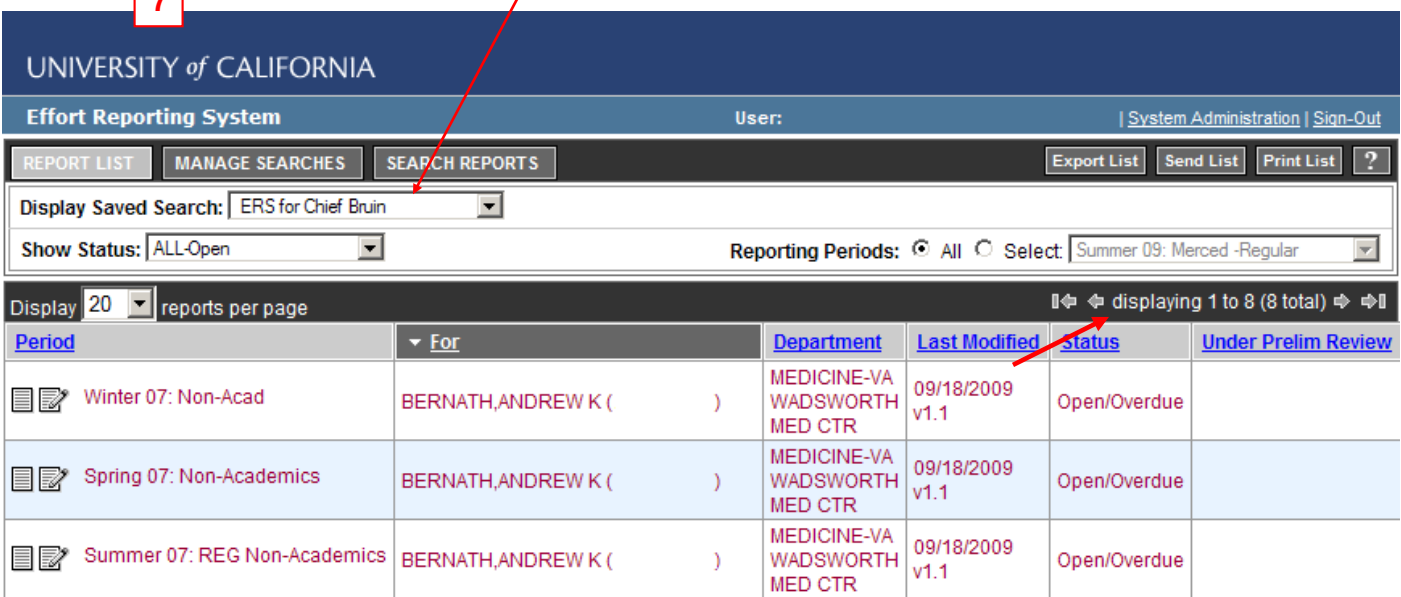
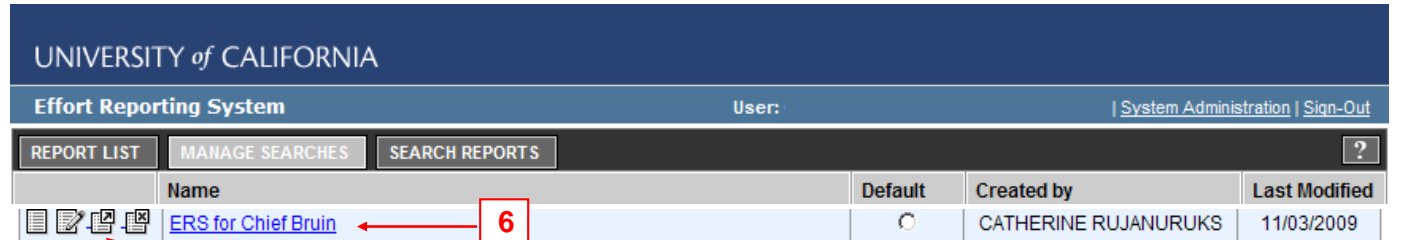
HOW TO CREATE A LIST OF ERS REPORTS TO SHARE


1. Log into ERS and click on the "Search Reports" tab.
2. "Filter By:" – Search for each employee by either entering their 9 digit employee ID (preferred) or name & click "Update Filter".
3. "Filtered Results List:" – Click on blue arrow/triangle to add employee to "Search Collection:".
4. Repeat steps 2-3 until all employees you wish to share are under the "Search Collection:" list.
 - If you accidentally added someone who shouldn't be on the list, click the blue arrow/triangle under "Search Collection:" to remove employee.
5. Click "Save As...", enter name for your search to save list & click "Save".

The screenshot shows the ERS Report Sharing interface. At the top, it says "UNIVERSITY of CALIFORNIA" and "Effort Reporting System". There are tabs for "REPORT LIST", "MANAGE SEARCHES", and "SEARCH REPORTS". The "SEARCH REPORTS" tab is active. Below the tabs, it says "EDITING SEARCH: <NEW SEARCH>". There are buttons for "Display Reports for:" with options "People", "Departments", "Funds", and "Projects". Below that is a "FILTER BY:" section with three checkboxes: "Name/Employee ID contains or equals", "Person's Home Department name or number contains or equals", and "Person is Principal Investigator (PI)". There are input fields for each checkbox. Below the filter section are "Update Filter" and "Reset Filter" buttons. Below that are two panels: "FILTERED RESULTS LIST:" and "SEARCH COLLECTION:". The "FILTERED RESULTS LIST:" panel shows a table with one row: "ODINOKOVA, IRINA V. () MEDICINE-VA WADSWORTH MED CTR - 1564". There is a blue arrow button next to the row. The "SEARCH COLLECTION:" panel shows a table with three rows: "BERNATH, ANDREW K () MEDICINE-VA WADSWORTH MED CTR - 1564", "GREENBERG, GIAN DAVID () MEDICINE-VA WADSWORTH MED CTR - 1564", and "JIA, WENZHUO () MEDICINE-VA WADSWORTH MED CTR - 1564". There are blue arrow buttons next to each row. Below the "SEARCH COLLECTION:" panel are "SAVE", "SAVE AS...", and "VIEW" buttons. Red callouts 1 through 5 point to the "SEARCH REPORTS" tab, the "Name/Employee ID" filter input, the blue arrow in the filtered results list, the blue arrow in the search collection, and the "SAVE AS..." button respectively.

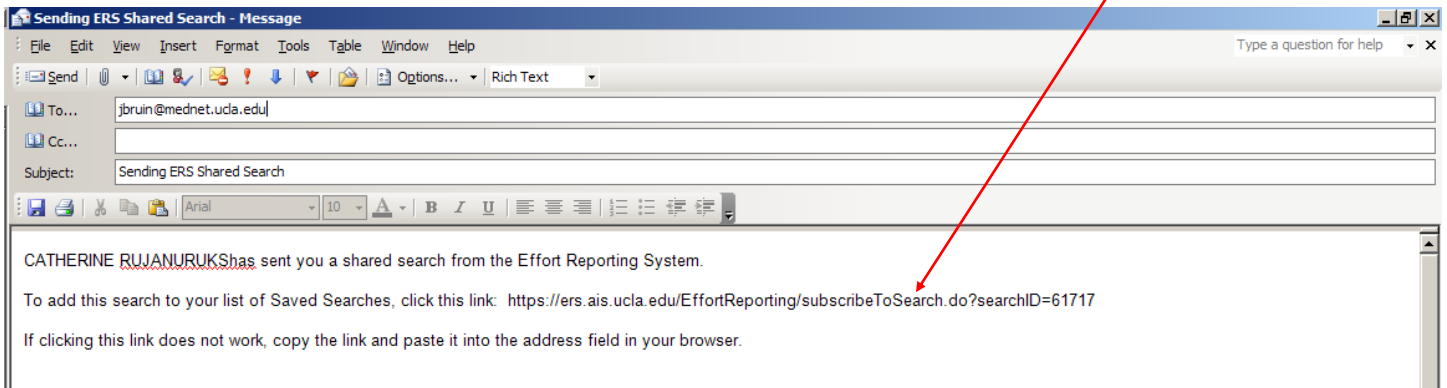


6. To view list, click on list name.



7. To send list, click on the paper with arrow icon .

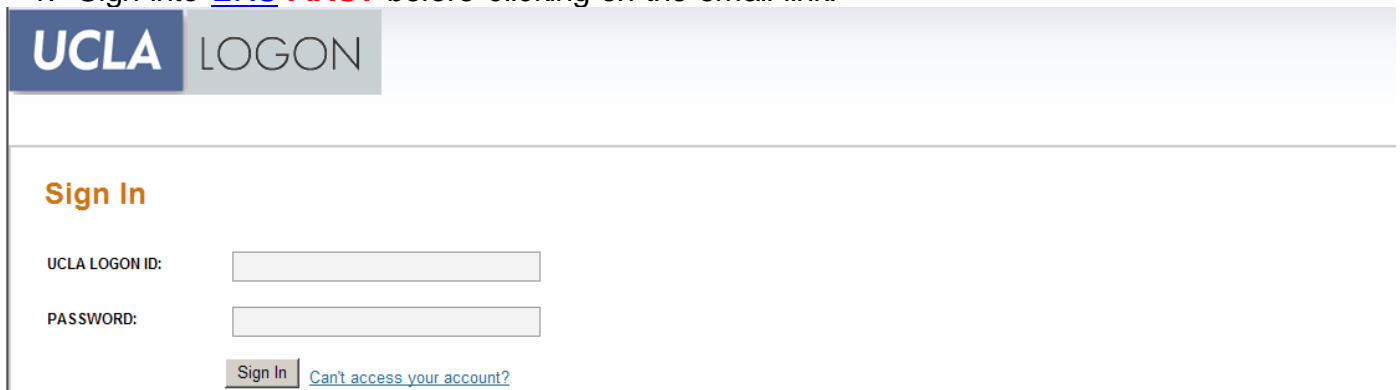
8. It will automatically generate an email from Outlook with a link to your ERS report list.



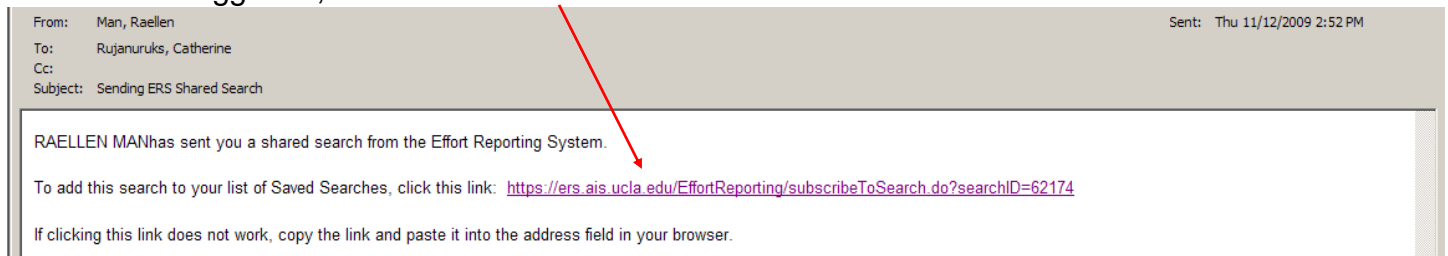
SEE BELOW FOR INSTRUCTIONS ON WHAT TO DO AFTER RECEIVING AN ERS SHARED SEARCH EMAIL. You can print the below pages & forward to your PI as an instruction manual.

HOW TO ACCESS A ERS SHARED SEARCH LIST

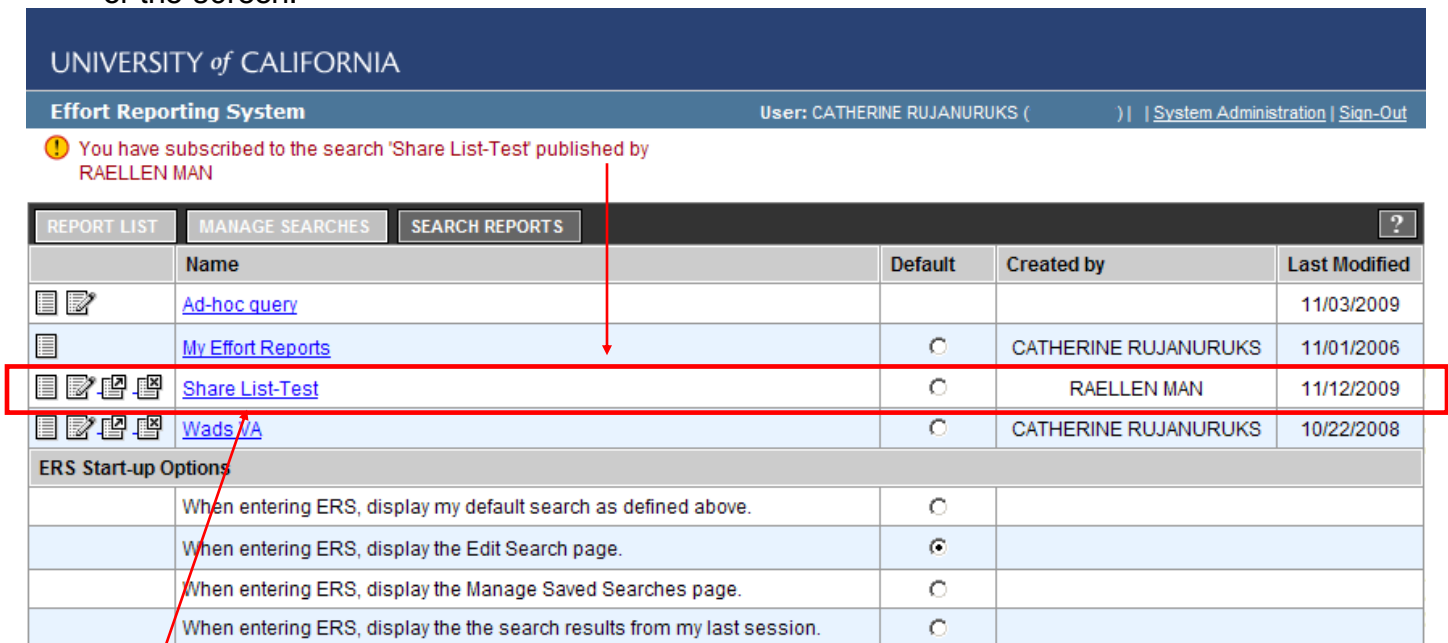
1. Sign into **ERS FIRST** before clicking on the email link.



2. Once logged in, click on the link from the email.



3. The list will automatically be added to your "Manage Searches" list with a message on the top of the screen.



REPORT LIST	MANAGE SEARCHES	SEARCH REPORTS	Name	Default	Created by	Last Modified
			Ad-hoc query			11/03/2009
			My Effort Reports	<input type="radio"/>	CATHERINE RUJANURUKS	11/01/2006
			Share List-Test	<input type="radio"/>	RAELLEN MAN	11/12/2009
			Wads /A	<input type="radio"/>	CATHERINE RUJANURUKS	10/22/2008

4. Click on the Name of the List & it will take you directly to the created/shared list.
5. See "[ERS for Certifiers](#)" Chapter in the DOM Fund Manager Manual with instructions on how to certify reports.

***If you accidentally click on the link prior to signing into ERS first, it will take you to the "Search Reports" menu. Click on "Manage Searches" and then re-click on the link from the email again. Then go to step 3 above.

