

DEFAULT EFFORT REPORT VIEW FOR PIs

Revised August 19, 2024

OVERVIEW

Due to a recent system-wide change, each PI needs to update the default view in order to ensure PIs receive their full effort report system (ERS) responsibility list.

STEPS

1. Log into Effort Reporting System (ERS). (<https://ers.it.ucla.edu/EffortReporting/enterERS.do>)
2. Click on “Manage Searches”.
3. Click on the “My Projects” Default radio button. This change will auto-save for the next time you log into ERS.
 - Leave ERS Start-up Options defaulted to “When entering ERS, display my default search as defined above.”

The screenshot shows the ERS interface with the following elements highlighted:

- 2**: The 'MANAGE SEARCHES' tab is selected.
- 3**: The 'My Projects' search is selected as the default (radio button is checked).
- The 'ERS Start-up Options' section is set to 'When entering ERS, display my default search as defined above.' (radio button is checked).

Name	Default	Created by	Last Modified
Ad-hoc query	<input type="radio"/>		07/07/2009
My Effort Reports	<input type="radio"/>		10/04/2006
My Projects	<input checked="" type="radio"/>		06/14/2007
My Certifications	<input type="radio"/>		10/10/2011

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 search results from my last session.	<input type="radio"/>

BACKGROUND

It is important to ensure the appropriate default list is displayed for PIs because pulling up the wrong list could lead to missed effort report requirements.

- **My Projects:** This list will show all employees paid on your projects (aka account/cost centers)
 - In the rare case where you are not paid from your own projects, you will not show up on your “My Projects” list. You will have to select the “**My Effort Reports**” list shown above to see your personal effort reports.
- **My Certifications:** This list will show all employees paid on your projects (aka account/cost centers) with the following two modifications.
 - Your effort reports will always be on this list.
 - *Certain title codes* that UCOP designated **will be excluded** from this list which means that this list may be incomplete when it comes to your ERS responsibility.