

ERS: CREATING A COMPLETE SEARCH LIST

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BACKGROUND

This chapter demonstrates how to run a single search that will generate a complete list of all ERS reports a Fund Manager is responsible for. Although there are multiple ways to create saved searches (i.e. by Individuals, Home Department, Funds, PI's My Projects list), each department should create *this* saved search to ensure all ERS reports for that department are accounted for.

The search by "Account Department" will list *all* ERS reports for employees paid on the Department's account number (e.g. 441357, 401357, etc), regardless of the employee's current home department. In other words, if an employee was paid from Dept A, but later moves to Dept B, the ERS quarters which contain Dept A accounts will remain on Dept A's ERS "Account Department" list, instead of moving to the employee's current home department list.

Before processing the steps below, be sure to **DELETE** all previous saved searches by Home Department Code from your Manage Searches! This new method should replace all searches by Home Department Code.

HOW TO

1. After logging into ERS with your UCLA Logon ID, click on "Search Reports" tab.
2. Click on "Display Reports For: Departments".
3. Choose department type: "Account Department" from the drop down menu.
4. Enter your 4 digit department code under "Department name or number contains or equals".
5. Click "Update Filter".
6. Under "Filtered Results List" on the left, click on the blue arrow to move the desired department to the right - "Search Collection".
7. To save, click "Save As...", enter name of saved search and click "Save".

The screenshot shows the "SEARCH REPORTS" tab selected. The "EDITING SEARCH: <NEW SEARCH>" section has "Display Reports for:" set to "Departments". The "FILTER BY:" section shows "Choose department type:" set to "Account Department" (indicated by red arrow 3). The "Department name or number contains or equals" field contains "1565" (indicated by red arrow 4). The "Update Filter" button is highlighted with a red box and labeled with red arrow 5. Below, the "FILTERED RESULTS LIST:" shows "MEDICINE-DEPT ADMINISTRATION 1565" with a blue arrow (indicated by red arrow 6) pointing to the right. The "SEARCH COLLECTION:" section shows "MEDICINE-DEPT ADMINISTRATION 1565" and "1 items in collection." The "SAVE AS..." button is highlighted with a red box and labeled with red arrow 7.

The screenshot shows the "SAVE SEARCH" dialog box. It contains a warning icon and the text "Please enter a name for your search". The input field contains "1565-Admin" (indicated by red arrow 7). There is a checkbox for "Display report list after saving" which is unchecked. The "SAVE" button is highlighted with a red box.