

Adding Sponsored Projects to the Effort Report



Introduction

Welcome to the Adding Sponsored Projects to the Effort Report module. In this module you will learn how to add an additional Sponsored Project to an Effort Report; and how to delete a project you added.

Why Add Additional Sponsored Projects?

ERS generates Effort Reports based on financial, payroll and cost sharing information from campus information systems.


Occasionally an Effort Report is generated that does not include all sponsored projects on which an individual might be assigned and expending effort. This could happen if an employee has no salary charged to a project but needs to report cost sharing or when retroactive payroll charges are being processed.

In these and other cases, it may be necessary to add a sponsored project to the ERS generated Effort Report.

Adding a Sponsored Project to an Effort Report involves a simple four-step process:

- Access the **Add Additional Project** function;
- Locate the project you want to add by accessing a list of established projects;
- Add the project to the Sponsored Projects list on the Effort Report; and,
- Save the report.

Access the Add Additional Project function

To add an additional sponsored project, you must first access the Effort Report of the individual for whom you are adding a project. Once you have located the Effort Report for the employee, click the **Edit** icon. 

When the Effort Report appears you are ready to add an additional sponsored project.

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








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

EFFORT REPORT LIST ?

Display Saved Search:

Reporting Periods: All Select:

REPORT LIST FOR: *MY PROJECTS*

Period	For	Last Modified	Status
 Winter 04/05 11/12 Academics	AEGORAN FARNINDAZ ,IRINTZI (938610243)	02/03/2006 - v1.0	Open
 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)	02/03/2006 - v1.0	Open
 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 reports per page displaying 1 to 10 (10 total)

Locate the project you want to add

To add a sponsored project, click on the **Add Additional Sponsored Project** button.

ERS generates the Add Additional Project screen on which all campus sponsored projects are listed.

Your project must be set up on the campus financial system for it to appear on the list.

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AEGORAN FARNINDAZ ,IRINTZI | WINTER 04/05 11/12 ACADEMICS

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Edit Report | **View/History** | **Comment Log**

Emp. ID: 938610243 | **Home Dept:** INSTITUTE OF THE ENVIRONMENT
Version: 1.0 (02/03/2006 01:11) | **Status:** Open
Service Period: January 1, 2005 to March 31, 2005
Pay Periods: January 1, 2005 to March 31, 2005

Sponsored Projects	Original Payroll %	Adjusted Payroll %	Original Cost Sharing %	Adjusted Cost Sharing %	Original Total %	Adjusted Total %
EPA R82735201 FROINES 05/06 53.50% 4-447711/AM-22863	43%	43 %	0%	0 %	43%	43%
USC/NIH H21993A HINDS 3/05 53.5% 4-445950/MH-57852	37%	37 %	0%	0 %	37%	37%
EPA CR82805901 FROINES 12/06 53.5% 4-447711/AM-22855	20%	20 %	0%	0 %	20%	20%
ADD ADDITIONAL SPONSORED PROJECT						
Total Sponsored Projects <i>requiring certification</i>	100%	100%		0%	100%	100%
Other Sponsored Projects	0%	0 %		+ 0 %	0%	0%
Max Sponsored Activities	0%	0 %		0 %	0%	0%

Locate the project you want to add (cont'd)

Begin the search for your project by typing in relevant information that will narrow the search.

In this example, "med" is the key search word.

Click the **Filter** button and ERS will generate a new list based on the search criteria.

The screenshot shows a web application window titled "ADDITIONAL PROJECT" with a close button in the top right corner. Below the title bar, there is a search filter section: "Display projects where any field contains or equals:" followed by a text input field containing "med" and a "Filter" button. A mouse cursor is pointing at the "Filter" button. Below the search bar is a table with the following columns: a selection column with checkboxes, a "Project Title" column, a "PI" column, and a "Select" button column. The table contains 14 rows of project data. At the bottom of the table, there is a "people per page" dropdown menu and a status bar indicating "displaying 1 to 20 (9524)". The browser's address bar shows the URL "p010107.ucop.edu:9080/EffortReporting/addSponsoredProject.do#4-447711/AM-22855". At the bottom right of the page, there is a button labeled "ADD ADDITIONAL SPONSORED PROJECT".

	Project Title	PI	
/ -23490	RESERVED FOR FIN AID W/S PROGRAM JOHNSON		Select
/ -23492	CWS FY 04/05 JOHNSON 6/05		Select
/ -23523	CWS FY 05/06 JOHNSON 6/06		Select
/ -23490	RESERVED FOR FIN AID W/S PROGRAM JOHNSON		Select
/ -23492	CWS FY 04/05 JOHNSON 6/05		Select
/ -23490	RESERVED FOR FIN AID W/S PROGRAM JOHNSON		Select
/ -23490	RESERVED FOR FIN AID W/S PROGRAM JOHNSON		Select
/ -23492	CWS FY 04/05 JOHNSON 6/05		Select
/FC-23426	USDOED P015A000053 BEREND 11/03 8%		Select
/ -23523	CWS FY 05/06 JOHNSON 6/06		Select
/ -23490	RESERVED FOR FIN AID W/S PROGRAM JOHNSON		Select
/ -23492	CWS FY 04/05 JOHNSON 6/05		Select
/ -23523	CWS FY 05/06 JOHNSON 6/06		Select
/ -23490	RESERVED FOR FIN AID W/S PROGRAM JOHNSON		Select

Add the project to the Sponsored Projects List

Review the filtered list and identify the project you wish to add to the list of sponsored projects on the Effort Report.

Click the **Select** button associated with that project.

The screenshot shows a web application interface for managing sponsored projects. At the top, there is a search bar with the text "Display projects where any field contains or equals: med" and a "Filter" button. Below the search bar is a table with the following columns: "Project Title", "PI", and "Select". The table contains 10 rows of project data. At the bottom of the table, there is a "people per page" dropdown menu and a "displaying 1 to 10 (10)" indicator. The browser's address bar shows "447711/AM-22855" and the "Internet" logo is visible. A button labeled "ADD ADDITIONAL SPONSORED PROJECT" is located at the bottom right of the page.

	Project Title	PI	Select
UM-26516	VA MED CNTR IPA FOR MICHAEL TUCK 5/06		Select
DW-26514	VA MED CNTR IPA FOR SU WASHINGTON 12/05		Select
BG-57557	ROBOMEDIA/DOC HARKEMA 10/05 32.50%		Select
3H-57557	ROBOMEDIA/DOC HARKEMA 10/05 32.50%		Select
3H-57564	ROBOMEDIC/USDOC 200302 HARKEMA 5/4 52.5%		Select
RE-57564	ROBOMEDIC/USDOC 200302 HARKEMA 5/4 52.5%		Select
KH-57195	MEDANTIC/NAVY 04022717 HOLYOAK 1/05 53.5		Select
PA-57856	LABIOMED.RES.INS/NIH 111948 PARLOW 6/5		Select
3X-24855	PHS SDS MED FY 04/05 JOHNSON 06/05		Select
3X-24857	PHS SDS MED FY 05/06 JOHNSON 06/06		Select

people per page displaying 1 to 10 (10)

Internet

447711/AM-22855

ADD ADDITIONAL SPONSORED PROJECT

Add the project to the Sponsored Projects List (cont'd)

ERS automatically inserts the project you selected onto the Effort Report.

You may add more projects using the same procedure.

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AEGORAN FARNINDAZ ,JRINTZI | WINTER 04/05 11/12 ACADEMICS
[Export Report](#) [Send Report](#) [Print Report](#) [?](#)

Edit Report
View History
Comment Log

Emp. ID: 938610243 | **Home Dept:** INSTITUTE OF THE ENVIRONMENT
Version: 1.0 (02/03/2006 01:11) | **Status:** Open
Service Period: January 1, 2005 to March 31, 2005
Pay Periods: January 1, 2005 to March 31, 2005

Sponsored Projects	Original Payroll %	Adjusted Payroll %	Original Cost Sharing %	Adjusted Cost Sharing %	Original Total %	Adjusted Total %
EPA R82735201 FROINES 05/06 53.50% 4-447711/AM-22863	43%	43 %	0%	0 %	43%	43%
USC/NIH H21993A HINDS 3/05 53.5% 4-445950/WH-57852	37%	37 %	0%	0 %	37%	37%
EPA CR82805901 FROINES 12/06 53.5% 4-447711/AM-22855	20%	20 %	0%	0 %	20%	20%
VA MED CNTR IPA FOR MICHAEL <input checked="" type="checkbox"/> TUCK 5/06 4-441346/UM-26516	0%	0 %	0%	0 %	0%	0%
ADD ADDITIONAL SPONSORED PROJECT						
Total Sponsored Projects <small>requiring certification</small>	100%	100%		0%	100%	100%

Troubleshooting: what if the project you want to add is not on the project list?

ERS can retrieve only sponsored projects that have been previously established on the Financial System fund table.

If ERS is unable to find the project you wish to add to the Effort Report, verify that the information you entered in the search field is correct and make changes as needed.

If ERS is still unable to find the project you specified, then that project has not yet been established on the Financial System fund table.

Troubleshooting: what if the project you want to add is not on the project list? (cont'd)

If you must account for effort on a project that is not on the list, you may do so by entering the project name and relevant information along with an explanation in the Comments field.

EPA CR82805901 FROINES 12/06 53.5% 4-447711/AM-22855	20%	<input type="text" value="20"/> %	0%	<input type="text" value="0"/> %	20%	20%
VA MED CNTR IPA FOR MICHAEL <input checked="" type="checkbox"/> TUCK 5/06 4-441346/UM-26516	0%	<input type="text" value="0"/> %	0%	<input type="text" value="0"/> %	0%	0%
ADD ADDITIONAL SPONSORED PROJECT						
Total Sponsored Projects <i>requiring certification</i>	100%	100%		0%	100%	100%
Other Sponsored Projects	0%	<input type="text" value="0"/> %		+ <input type="text" value="0"/> %	0%	0%
Non-Sponsored Activities	0%	<input type="text" value="0"/> %		- <input type="text" value="0"/> %	0%	0%
Total Other Effort <i>not requiring certification</i>	0%	0%		0%	0%	0%
Grand Total	100%	100%		0%	100%	100%
UPDATE CALCULATION						
Report Options :	<input type="checkbox"/> Report requires multiple certifications. <input type="checkbox"/> Report allows for Cost Sharing Offset Against Other Sponsored Projects.					
Add a comment:	<input type="text"/>					
Comments can be up to 255 characters long. (Total characters: 0)						
VIEW PAYROLL DETAILS			REVERT		SAVE	CERTIFY EFFORT REPORT

Save the Report

Click the **Save** button to save the updated report.

Once you add an additional sponsored project you may enter the percent of effort expended on that project or exit the report and enter effort at a later time.

EPA CR82805901 FROINES 12/06 53.5% 4-447711/AM-22855	20%	<input type="text" value="20"/> %	0%	<input type="text" value="0"/> %	20%	20%
VA MED CNTR IPA FOR MICHAEL <input checked="" type="checkbox"/> TUCK 5/06 4-441346/UM-26516	0%	<input type="text" value="0"/> %	0%	<input type="text" value="0"/> %	0%	0%
ADD ADDITIONAL SPONSORED PROJECT						
Total Sponsored Projects <i>requiring certification</i>	100%	100%		0%	100%	100%
Other Sponsored Projects	0%	<input type="text" value="0"/> %		+ <input type="text" value="0"/> %	0%	0%
Non-Sponsored Activities	0%	<input type="text" value="0"/> %		- <input type="text" value="0"/> %	0%	0%
Total Other Effort <i>not requiring certification</i>	0%	0%		0%	0%	0%
Grand Total	100%	100%		0%	100%	100%
UPDATE CALCULATION						
Report Options :	<input type="checkbox"/> Report requires multiple certifications. <input type="checkbox"/> Report allows for Cost Sharing Offset Against Other Sponsored Projects.					
Add a comment:	<input type="text" value="Cost Sharing commitment on VA Project"/>					
Comments can be up to 255 characters long. (Total characters: 37)						
VIEW PAYROLL DETAILS			REVERT		SAVE	
CERTIFY EFFORT REPORT						

How to Delete a Project You Added

Anytime you manually add a project to an Effort Report, ERS creates an **x box** in the upper right hand corner of the project box.

You can delete any project you have added by clicking on this box.

System generated projects cannot be deleted.

Emp. ID: 958910245 | Home Dept: INSTITUTE OF THE ENVIRONMENT
 Version: 1.1 (02/06/2006 03:56) | Status: Open
 Service Period: January 1, 2005 to March 31, 2005
 Pay Periods: January 1, 2005 to March 31, 2005

Sponsored Projects	Original Payroll %	Adjusted Payroll %	Original Cost Sharing %	Adjusted Cost Sharing %	Original Total %	Adjusted Total %
EPA R82735201 FROINES 05/06 53.50% 4-447711/AM-22863	43% <input type="checkbox"/>	43 %	0%	0 %	43%	43%
USC/NIH H21993A HINDS 3/05 53.5% 4-445950/WH-57852	37% <input type="checkbox"/>	37 %	0%	0 %	37%	37%
EPA CR82805901 FROINES 12/06 53.5% 4-447711/AM-22855	20% <input type="checkbox"/>	20 %	0%	0 %	20%	20%
VA MED CNTR IPA FOR MICHAEL TUCK 5/06 4-441346/JM-26516	0% <input type="checkbox"/>	0 %	0%	5 %	0%	5%
ADD ADDITIONAL SPONSORED PROJECT						
Total Sponsored Projects <i>requiring certification</i>	100%	100%		5%	100%	105%
Other Sponsored Projects	0% <input type="checkbox"/>	0 %		+ 0 %	0%	0%
Non-Sponsored Activities	0% <input type="checkbox"/>	0 %		- 5 %	0%	-5%
Total Other Effort <i>not requiring certification</i>	0%	0%		-5%	0%	-5%
Grand Total	100%	100%		0%	100%	100%

UPDATE CALCULATION

How to Delete a Project You Added (cont'd)

If you previously entered effort for a project you are now deleting, the Effort Report will be out-of-balance once you remove the project.

You will need to Correct the out-of-balance situation. An out of balance Effort Report cannot be saved or certified.

10107.ucop.edu:9080/EffortReporting/editReport.do

Pay Periods: January 1, 2005 to March 31, 2005

Sponsored Projects	Original Payroll %	Adjusted Payroll %	Original Cost Sharing %	Adjusted Cost Sharing %	Original Total %	Adjusted Total %
EPA R82735201 FROINES 05/06 53.50% 4-447711/AM-22863	43%	<input type="text" value="43"/> %	0%	<input type="text" value="0"/> %	43%	43%
USC/NIH H21993A HINDS 3/05 53.5% 4-445950WH-57852	37%	<input type="text" value="37"/> %	0%	<input type="text" value="0"/> %	37%	37%
EPA CR82805901 FROINES 12/06 53.5% 4-447711/AM-22855	20%	<input type="text" value="20"/> %	0%	<input type="text" value="0"/> %	20%	20%
ADD ADDITIONAL SPONSORED PROJECT						
Total Sponsored Projects <i>requiring certification</i>	100%	100%		0%	100%	100%
Other Sponsored Projects	0%	<input type="text" value="0"/> %		+ <input type="text" value="0"/> %	0%	0%
Non-Sponsored Activities	0%	<input type="text" value="0"/> %		- <input type="text" value="5"/> %	0%	-5%
Total Other Effort <i>not requiring certification</i>	0%	0%		-5%	0%	-5%
Grand Total	100%	100%		-5%	100%	95%
UPDATE CALCULATION						
Report Options :	<input type="checkbox"/> Report requires multiple certifications. <input type="checkbox"/> Report allows for Cost Sharing Offset Against Other Sponsored Projects.					
Add a comment:	<input type="text"/>					

Conclusion

This concludes the Adding Sponsored Projects to the Effort Report module.

In this module you learned how to:

- Access the **Add Additional Project** function.
- Use the **Filter** function to locate the project you want to add.
- Use the **Select** function to add the desired project to the Sponsored Projects list on the Effort Report.
- **Save** the Effort Report once you have added a project.
- **Delete** a project that you added.