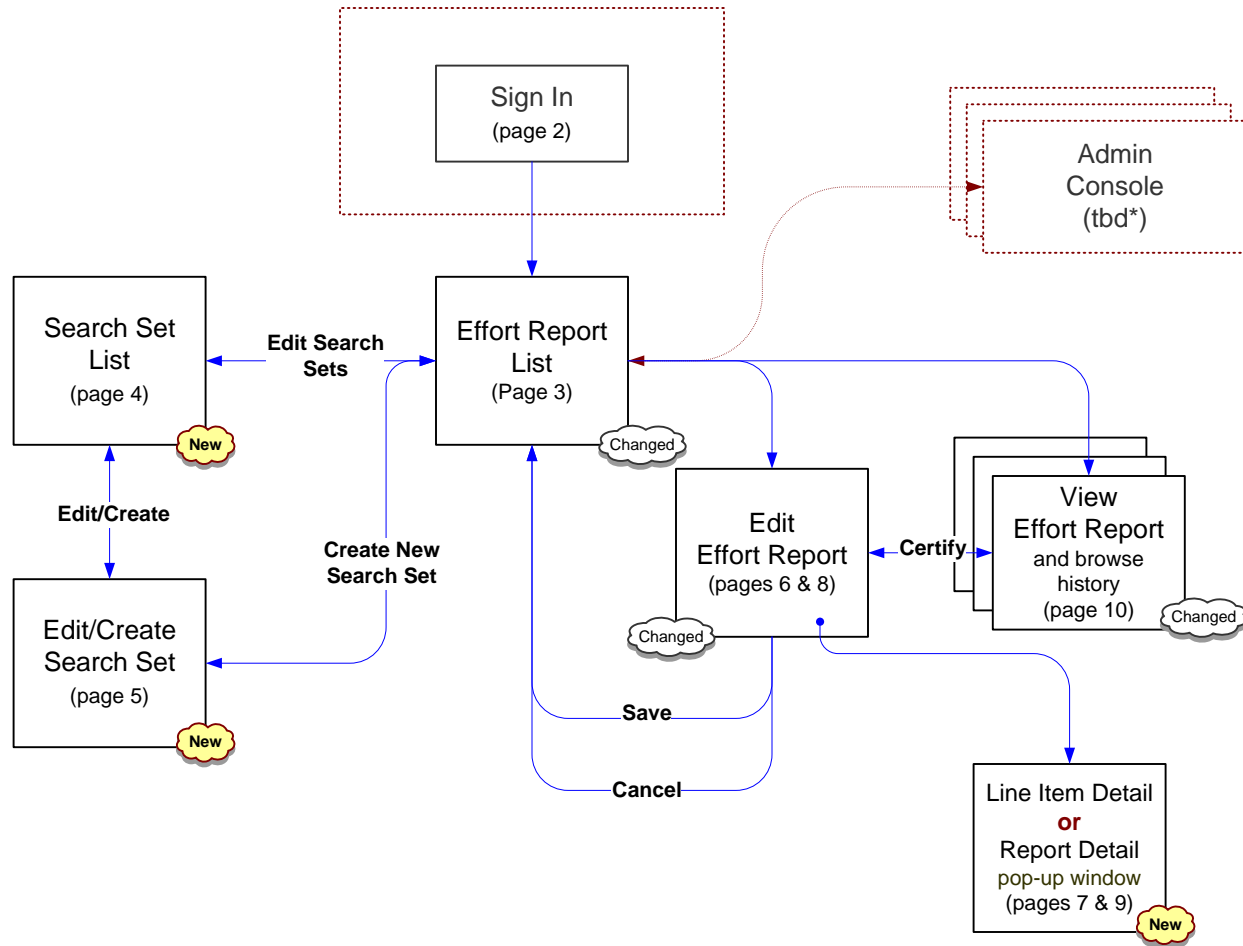


UC Effort Reporting System User Experience :: Page Map

Version 2.0 ~ Tuesday, January 18, 2005



Notes:

New Screens:

- Search List
- Search Edit
- Line Item Detail and Report Detail (different options)

Modified Screens:

- Effort Report List
 - Added Print, Send Export and Help (?) buttons.
 - Added paging controls.
 - Removed the ERS Coordinator search criteria.
 - Added drop-down for selecting a Search Set.
 - Added *Edit Search Sets* button.
- Edit Effort Report
 - Added line item drilldown and report detail buttons.
- View Effort Report
 - Added history browsing widgets.

* **tbd**: no representation in this version, as yet to be designed

UC Effort Reporting System User Experience :: Sign-In

Version 2.0 ~ Tuesday, January 18, 2005

The screenshot shows a web browser window titled "Effort Reporting System :: Sign-In - Mozilla Firefox". The address bar contains the URL "http://www.ucop.edu/sysdev1/ers/proto/proto_v2/index.php?campus=uc". The page header features the "UC Sunnydale" logo and the text "Effort Reporting System". The main content area is a sign-in form with the following elements:

- Sign-In** (Section Header)
- User Name :**
- Password:**
-

At the bottom of the page, there is a navigation menu with links: [UC Sunnydale](#) | [Accounting Office](#) | [Human Resources](#) | [Information Technology](#) | [PPS](#). Below the menu, it states "Last Updated: November 23, 2004". The browser status bar at the bottom shows "Done".

Notes:

This sign-in page would only be seen if the campus version of the ERS system does not want to use their own sign-in mechanism.

UC Effort Reporting System User Experience :: Report List

Version 2.0 ~ Tuesday, January 18, 2005

UC Sunnydale

Effort Reporting System

Name: Aaron Smith | [Log Out](#)
Emp #: 000050129 | Title: Professor-Medcomp-B (1761)
Dept: Molecular & Medical Pharmacology

Search Set Criteria [Edit Search Sets...](#)

Select Search Set: Open ERs for Aaron Smith as PI (default)

| | | | | | |
|---------------------|-------------|-------------------|-----|-----------|----------|
| Person: | Aaron Smith | Departments: | All | Projects: | All |
| Show Project Staff: | Yes | Reporting Period: | All | Status: | All Open |

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

| Report | For | Last Modified | Status |
|------------------|--------------------------------|---------------|---------------------|
| Fall Qtr 04 v0.0 | Aaron Smith Emp. # 01244 | 12/11/2004 | Ready for Review |
| Fall Qtr 04 v0.3 | Paul Tiddliwink Emp. # 07724 | 05/08/2003 | Partially Certified |
| Fall Qtr 04 v1.1 | Janus Nakano Emp. # 06528 | 10/02/2002 | Open - Reissued |
| Summer 04 v0.2 | Aaron Smith Emp. # 01244 | 10/02/2004 | In Progress |

page 1 of 1

[UC Sunnydale](#) | [Accounting Office](#) | [Human Resources](#) | [Information Technology](#) | [PPS](#)

Last Updated: November 23, 2004

Done

Notes:

This example shows a PI who certifies for himself and for two other people who work on his projects.

Since the PI has used the system before, they are taken directly to list of Reports assigned to them.

The PI can select from a pre-determined set of Search Criteria or they can create their own.

Uncertified reports in the list have both an *Edit* and a *View* button. Certified reports would only have a *View* button

Each column can be sorted by clicking on the header cell of the column.

UC Effort Reporting System User Experience :: Saved Search Criteria

Version 2.0 ~ Tuesday, January 18, 2005

The screenshot shows a web browser window titled "ERS :: Saved Search Sets - Mozilla Firefox". The address bar shows the URL "http://www.ucop.edu/sysdev1/ers/proto/proto_v3/crite". The page header includes the UC Sunnydale logo and the text "Effort Reporting System". A user information bar displays: "Name: Aaron Smith | Log Out", "Emp #: 000050129 | Title: Professor-Medcomp-B (1761)", and "Dept: Molecular & Medical Pharmacology".

The main content area is titled "Saved Search Sets" and contains a table with the following data:

| | Name | Default | Created by | Last Modified | |
|--|---------------------------------------|-------------------------------------|-------------|---------------|--|
| | My Open Effort Reports | | System | 12/11/2004 | <input type="button" value="Run Set"/> |
| | Open ERs for Aaron Smith as PI | <input checked="" type="checkbox"/> | System | 05/08/2003 | <input type="button" value="Run Set"/> |
| | This years reports... | | Aaron Smith | 10/02/2002 | <input type="button" value="Run Set"/> |
| | Last years reports... | | Aaron Smith | 10/02/2004 | <input type="button" value="Run Set"/> |
| | ERs for Recombinative DNA Project | | Aaron Smith | 10/02/2002 | <input type="button" value="Run Set"/> |
| | BioChem Department | | Aaron Smith | 10/02/2004 | <input type="button" value="Run Set"/> |

Below the table is a button labeled "CREATE NEW SEARCH SET ...".

At the bottom of the page, there are links for "UC Sunnydale", "Accounting Office", "Human Resources", "Information Technology", and "PPS". A footer note states "Last Updated: November 23, 2004".

Notes:

The predefined Search Sets can not be edited or deleted.

The PI has the option of editing or deleting the Search Sets that they have created or create a new Set.

Run Set will return the PI to the Report List displaying the new Search Set.

The *Default* Search Set is the set which is displayed after Sign-In.

UC Effort Reporting System User Experience :: Create Search Criteria

Version 2.0 ~ Tuesday, January 18, 2005

Effort Reporting System - Mozilla Firefox

File Edit View Go Bookmarks Tools Help

http://www.ucop.edu/sysdev1/ers/proto/proto_v3/cre: Go

UC Sunnydale

Effort Reporting System Name: Aaron Smith | [Log Out](#)
Emp #: 000050129 | Title: Professor-Medcomp-B (1761)
Dept: Molecular & Medical Pharmacology

Create New Search Set ?

Name: Make Default

Search by :

Limit to departments containing:

To view a shorter list, enter a letter, word, or phrase and click Filter.

Select one or more departments from the list.

- Applied Ocean Science
- Biomedical Sciences
- Cellular & Molecular Medicine
- Cognitive Science
- Computer Science & Engineering
- Earth Sciences
- Neurosciences

Include Period

All
 Current (the current period for which there is data available)
 The current year (beginning in September)
 Selection:

Include Status

All Open Only Open - Reissued Partially Certified Certified

Notes:

Search Sets can be defined to search on Departments, Funds, or People.

The selection tools available for each category of search might be very different because each universe of data is so different.

In this example, the PI is setting up a search on Department. They have set a filter on the list for the word "science" to limit the list to make it easier to find the Department they are looking for. (The filter is not part of the Search Set and is not saved. It is only a navigation tool.)

UC Effort Reporting System User Experience :: Edit Effort Report with Drilldown

Version 2.0 ~ Tuesday, January 18, 2005

Effort Reporting System - Mozilla Firefox
File Edit View Go Bookmarks Tools Help

http://www.ucop.edu/sysdev1/ers/proto/proto_v3/report.php

Effort Reporting System

Name: Aaron Smith | [Log Out](#)
Emp #: 000050129 | **Title:** Professor-Medcomp-B (1761)
Dept: Molecular & Medical Pharmacology

Report: Aaron Smith - Spring Qtr. 04
Status: Open | **Version:** 1.0 (04/11/2003)

| | Original Payroll % Effort | Adjusted Payroll % Effort | Original Cost Sharing % | Adjusted Cost Sharing % | Original Total % | Adjusted Total % |
|--|---------------------------|-----------------------------------|-------------------------|----------------------------------|------------------|------------------|
| Sponsored Projects | | | | | | |
| Recombinative DNA 3247701--63000--2 | 40% | <input type="text" value="40"/> % | 0% | <input type="text" value="0"/> % | 40% | 40% |
| Molecular Structures 3247701--64000--2 | 15% | <input type="text" value="15"/> % | 0% | <input type="text" value="0"/> % | 15% | 15% |
| ADD ADDITIONAL SPONSORED PROJECT | | | | | | |
| Total Sponsored Projects <small>requiring certification</small> | 55% | 55% | 0% | 0% | 55% | 55% |
| Other Sponsored Projects | 15% | <input type="text" value="15"/> % | 0% | <input type="text" value="0"/> % | 15% | 15% |
| Non-Sponsored Activities | 30% | <input type="text" value="30"/> % | 0% | <input type="text" value="0"/> % | 30% | 30% |
| Total Other Effort <small>not requiring certification</small> | 45% | 45% | 0% | 0% | 45% | 45% |
| Grand Total | 100% | 100% | 0% | 0% | 100% | 100% |
| UPDATE CALCULATION | | | | | | |
| <p>Add a comment : <input style="width: 90%;" type="text"/></p> <p><input type="checkbox"/> Report requires multiple certifications</p> | | | | | | |
| <p>CANCEL SAVE CERTIFY EFFORT REPORT</p> | | | | | | |

Notes:

On this screen, clicking a value in the Original Payroll % Effort column displays the detailed payroll data behind that derived value. (page 7). See *Edit Effort Report with Detail* (page 8) for the alternate version.

Add Additional Sponsored Project button would bring up a pop-up window that with a sponsored fund picker.

Editing a field dynamically updates the calculated fields.

If the total fields do not calculate to 100% or 0% as required, the field changes color to indicate the error and the *Certify Effort Report* button would dim.

Report requires multiple certifications checkbox.

UC Effort Reporting System User Experience :: Drill-down

Version 2.0 ~ Tuesday, January 18, 2005

The screenshot shows a Mozilla Firefox browser window displaying the UC Effort Reporting System. A modal window titled "ERS :: Line Item Detail" is open, showing a table of line items and their details. The background page shows a sidebar with "Sponsored" and "Other Sponsored" sections, and a main content area with a table of line items. The modal window has buttons for "Email", "Print", "Export", and "Close".

ERS :: Line Item Detail [Email] [Print] [Export] [Close]

Line item detail from
Effort Report: Spring Qtr. 04 | Status: **Open**
Project: Recombinative DNA (3247701--63000--2) **Total % Effort: 40%**
Employee: Aaron Smith | Emp. #: 000050129

| Period End Date | Title | DOS | Trans | Sched | Rate Type | Payrate | Paid Hours | Paid Amount | Paid % |
|-----------------|-------|-----|-------|-------|-----------|---------|------------|-------------|--------|
| 3/31/2004 | 4722 | REG | AU | M | 2 | 3078.00 | 73.60 | \$1,231.20 | 0.400 |
| 4/30/2004 | 4722 | REG | AU | M | 2 | 3078.00 | 73.60 | \$1,231.20 | 0.400 |
| 5/31/2004 | 4722 | REG | AU | M | 2 | 3078.00 | 73.60 | \$1,231.20 | 0.400 |
| 6/30/2004 | 4728 | REG | AU | M | 2 | 3078.00 | 73.60 | \$1,231.20 | 0.400 |

Detail on codes:

Title Code (Title): 4722 Lab Administrator
4728 Lab Manager

Transaction Code (Trans): AU Annual

DOS Code (DOS): REG Regular Pay

Pay Schedule Code (Sched): M Monthly-Current

Rate Type Code (Rate Type): 2 Staff, Career

UPDATE CALCULATOR

Add a comment :

Report requires multiple certifications

[CANCEL] [SAVE] [CERTIFY EFFORT REPORT]

UC Sunnydale | Accounting Office | Human Resources | Information Technology | PPS

Notes:

The key at the bottom of the drill-down screen displays the description behind each code.

Pulling code descriptions out of the table and using abbreviations for column headings makes the table small enough to show without horizontal scrolling.

UC Effort Reporting System User Experience :: Edit Effort Report with Detail

Version 2.0 ~ Tuesday, January 18, 2005

Effort Reporting System

Name: Aaron Smith | [Log Out](#)
 Emp #: 000050129 | Title: Professor-Medcomp-B (1761)
 Dept: Molecular & Medical Pharmacology

Report: Aaron Smith - Spring Qtr. 04
 Status: Open | Version: 1.0 (04/11/2003)

| | Original Payroll % Effort | Adjusted Payroll % Effort | Original Cost Sharing % | Adjusted Cost Sharing % | Original Total % | Adjusted Total % |
|---|------------------------------|-----------------------------------|----------------------------|----------------------------------|---------------------|---------------------|
| ADD ADDITIONAL SPONSORED PROJECT | | | | | | |
| Sponsored Projects | | | | | | |
| Recombinative DNA 3247701--63000--2 | 40% | <input type="text" value="40"/> % | 0% | <input type="text" value="0"/> % | 40% | 40% |
| Molecular Structures 3247701--64000--2 | 15% | <input type="text" value="15"/> % | 0% | <input type="text" value="0"/> % | 15% | 15% |
| Total Sponsored Projects <i>requiring certification</i> | 55% | 55% | 0% | 0% | 55% | 55% |
| Other Sponsored Projects | 15% | <input type="text" value="15"/> % | 0% | <input type="text" value="0"/> % | 15% | 15% |
| Non-Sponsored Activities | 30% | <input type="text" value="30"/> % | 0% | <input type="text" value="0"/> % | 30% | 30% |
| Total Other Effort <i>not requiring certification</i> | 45% | 45% | 0% | 0% | 45% | 45% |
| Grand Total | 100% | 100% | 0% | 0% | 100% | 100% |

UPDATE CALCULATION

Add a Comment :

Report requires multiple certifications

VIEW PAYROLL DETAILS
CANCEL
SAVE
CERTIFY EFFORT REPORT

Notes:

On this screen, clicking the *View Payroll Detail* button displays the detailed payroll data behind the whole report. (page 9).
 See *Edit Effort Report with Drilldown* (page 6) for the alternate version.

Add Additional Sponsored Project button would bring up a pop-up window that with a sponsored fund picker.

Editing a field dynamically updates the calculated fields.

If the total fields do not calculate to 100% or 0% as required, the field changes color to indicate the error and the *Certify Effort Report* button would dim.

Report requires multiple certifications checkbox.

UC Effort Reporting System User Experience :: Details

Version 2.0 ~ Tuesday, January 18, 2005

ERS :: Detail for Spring Qtr. '04 [Email] [Print] [Export] [Close]

Effort Report: Spring Qtr. 04 | **Status:** Open
includes pay period 7/1-10/31, service period 9/25-12/13
Employee: Aaron Smith | **Emp. #:** 000050129

Project: Recombinative DNA (3247701--63000--2) **Total % Effort:** 40%

| Period End Date | Title | DOS | Trans | Sched | Rate Type | Pay rate | Paid Hours | Paid Amount | Paid % |
|-----------------|-------|-----|-------|-------|-----------|----------|------------|-------------|--------|
| 3/31/2004 | 4722 | REG | AU | M | 2 | 3078.00 | 73.60 | \$1,231.20 | 0.400 |
| 4/30/2004 | 4722 | REG | AU | M | 2 | 3078.00 | 73.60 | \$1,231.20 | 0.400 |
| 5/31/2004 | 4722 | REG | AU | M | 2 | 3078.00 | 73.60 | \$1,231.20 | 0.400 |
| 6/30/2004 | 4728 | REG | AU | M | 2 | 3078.00 | 73.60 | \$1,231.20 | 0.400 |

Project: Molecular Structures (3247701--43000--2) **Total % Effort:** 15%

| Period End Date | Title | DOS | Trans | Sched | Rate Type | Pay Rate | Paid Hours | Paid Amount | Paid % |
|-----------------|-------|-----|-------|-------|-----------|----------|------------|-------------|--------|
| 3/31/2004 | 4728 | REG | AU | M | 2 | 3078.00 | 18.4 | \$307.80 | 0.100 |
| 3/31/2004 | 5102 | REG | AU | M | 2 | 3078.00 | 9.2 | \$153.90 | 0.050 |
| 4/30/2004 | 4728 | REG | AU | M | 2 | 3078.00 | 18.4 | \$307.80 | 0.100 |
| 4/30/2004 | 5102 | REG | AU | M | 2 | 3078.00 | 9.2 | \$153.90 | 0.050 |
| 5/31/2004 | 4728 | REG | AU | M | 2 | 3078.00 | 18.4 | \$307.80 | 0.100 |
| 5/31/2004 | 5102 | REG | AU | M | 2 | 3078.00 | 9.2 | \$153.90 | 0.050 |
| 6/30/2004 | 4728 | REG | AU | M | 2 | 3078.00 | 18.4 | \$307.80 | 0.100 |

Report requires multiple certifications

[VIEW PAYROLL DETAILS] [CANCEL] [SAVE] [CERTIFY EFFORT REPORT]

UC Systems | Accounting Office | Human Resources | Information Technology | PPS
 Last Updated: November 23, 2004

Notes:

This detail screen also contains the same key displayed at the bottom of the screen for the drill-down screen (page 7).

UC Effort Reporting System User Experience :: View Certified Effort Report

Version 2.0 ~ Tuesday, January 18, 2005

UC Sunnydale

Effort Reporting System Name: Aaron Smith | [Log Out](#)
 Emp #: 01244 | Title: Professor-Medcomp-B (1761)
 Dept: Molecular & Medical Pharmacology

Report: Aaron Smith - Spring Qtr. 04
 Status: **Certified** | Version: 2.0 (04/11/2003)
 Saved by: Aaron Smith on 12/23/2004

Version History: 2.0 (04/11/2003) Certified

| | Original Payroll % Effort | Adjusted Payroll % Effort | Original Cost Sharing % | Adjusted Cost Sharing % | Original Total % | Adjusted Total % |
|---|---------------------------|---------------------------|-------------------------|-------------------------|------------------|------------------|
| Sponsored Projects | | | | | | |
| Recombinative DNA 3247701--63000--2 | 40% | 40% | 0% | 0% | 40% | 40% |
| Molecular Structures 3247701--64000--2 | 15% | 15% | 0% | 0% | 15% | 15% |
| Total Sponsored Projects <i>requiring certification</i> | 55% | 55% | 0% | 0% | 55% | 55% |
| Other Sponsored Projects | 15% | 15% | 0% | 0% | 15% | 15% |
| Non-Sponsored Activities | 30% | 30% | 0% | 0% | 30% | 30% |
| Total Other Effort <i>not requiring certification</i> | 45% | 45% | 0% | 0% | 45% | 45% |
| Grand Total | 100% | 100% | 0% | 0% | 100% | 100% |

Comments: Ne adipiscing demoveo torqueo eros saepius.
 Odio mos nulla camur dignissim utinam. Illum veniam ne, neo reprobato appellatio olim bis
 pecus qui refoveo cogo, molior.
 - Aaron Smith, 12/23/2004

[VIEW PAYROLL DETAILS](#) [OPEN FOR RE-CERTIFICATION](#)

[UC Sunnydale](#) | [Accounting Office](#) | [Human Resources](#) | [Information Technology](#) | [PPS](#)

Last Updated: November 23, 2004

Notes:

This screen represents a certified Effort Report in *View mode* (as opposed to *Edit mode*)

This version contains a history widget for scrolling through all previous versions of the report.