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