



View OLD Effort Reports (Jan. 2004 – Mar. 2013)

Employees may view effort reports dated between January 2004 and March 2013, within selected parameters, utilizing the Oracle Administrative Systems. The View OLD Effort Reports (Jan. 2004 – Mar. 2013) form is available on the following Oracle Administrative Systems responsibilities:

-
- | | | |
|--------------------------------|---|--|
| UAB Effort Report User | → | View Old Effort Reports (Jan. 2004 - Mar. 2013)
(restricted to individual) |
| UAB Salary Reclass User | → | View Old Effort Reports (Jan. 2004 – Mar. 2013)
(restricted based on HR Organizational Security) |
| UAB HR Officer | → | View Old Effort Reports (Jan. 2004 – Mar. 2013)
(restricted based on HR Organizational Security) |
-

The **Find: Effort Report** window will load.

Find: Effort Report

Enter Criteria

Employee Name Document Number

Employee Number Version

Primary Organization Workflow Status

Effort Report Year

Effort Report Period

Period Dates

Effort Report Status Control

Comments

Status

Search By Approver

Approver Name

Approver Number

Show Only Active Efforts

Show Only Latest Versions

Show Log With Eff Rep

Show Listing Before Export

Search by Approver

Sort Listing By:

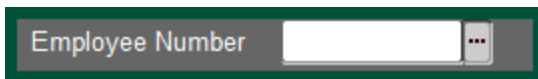
View Old Effort Reports (Jan. 2004 – Mar. 2013)

The scope of the report is dependent on the search criteria entered by the requestor. The fields available for search criteria are defined below. **NOTE: Under the responsibility, UAB Effort Report User, the requestor may view only their personal effort reports.**

The requestor may enter the employee's name (Last Name, First Name) or may use the LOV in the **Employee Name** field to search for a specific individual. Once the employee has been determined, the **Employee Number** field will auto populate.

A search field with a dark green border. The label "Employee Name" is on the left. The input area is white with a small dropdown arrow on the right side.

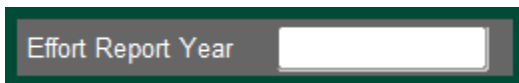
The requestor may enter the employee's identification number (7 –digit) or may use the LOV in the **Employee Number** field to search for a specific individual. Once the employee number is selected, the **Employee Name** field will auto populate.

A search field with a dark green border. The label "Employee Number" is on the left. The input area is white with a small dropdown arrow on the right side.

The requestor may search using the **Primary Organization** field. The data can be entered manually or chosen from the options provided by the LOV. The information extracted will be dependent on the employee's primary organization affiliation.

A search field with a dark green border. The label "Primary Organization" is on the left. The input area is white.

The **Effort Report Year** field must be entered manually. Once the year is entered, the requestor must select the effort report period.

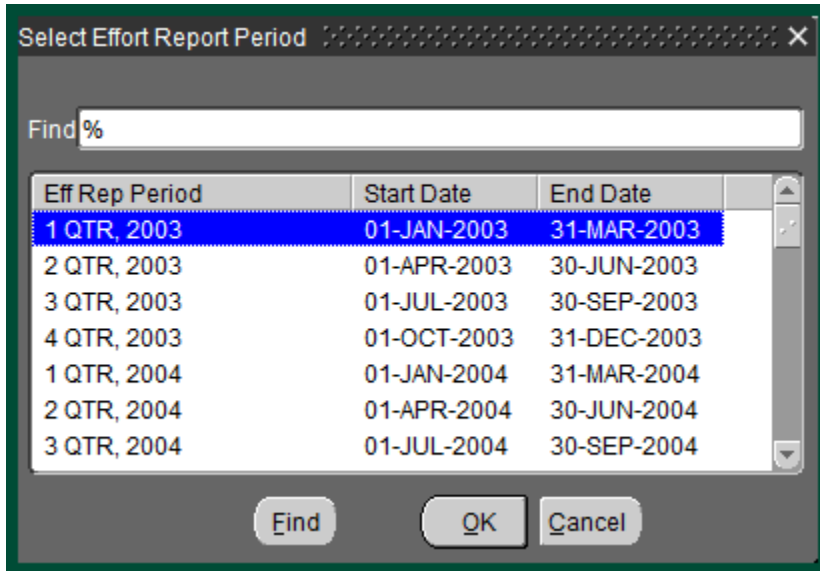
A search field with a dark green border. The label "Effort Report Year" is on the left. The input area is white.

The **Effort Report Period** search criterion allows the requestor to search according to a specific period of time.

A search field with a dark green border. The label "Effort Report Period" is on the left. The input area is white with a small dropdown arrow on the right side.

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Selecting the LOV in the **Effort Report Period** field will return a list of available data.



Eff Rep Period	Start Date	End Date
1 QTR, 2003	01-JAN-2003	31-MAR-2003
2 QTR, 2003	01-APR-2003	30-JUN-2003
3 QTR, 2003	01-JUL-2003	30-SEP-2003
4 QTR, 2003	01-OCT-2003	31-DEC-2003
1 QTR, 2004	01-JAN-2004	31-MAR-2004
2 QTR, 2004	01-APR-2004	30-JUN-2004
3 QTR, 2004	01-JUL-2004	30-SEP-2004

The **Period Dates** field will auto populate once the effort reporting period is selected.



To search for a specific document, the requestor may enter the document number in the **Document Number** field.



If an effort report has been generated more than one time for a reporting period, this is noted by a version number. To use the **Version** field, the requestor must enter data in the **Document Number** field as well.



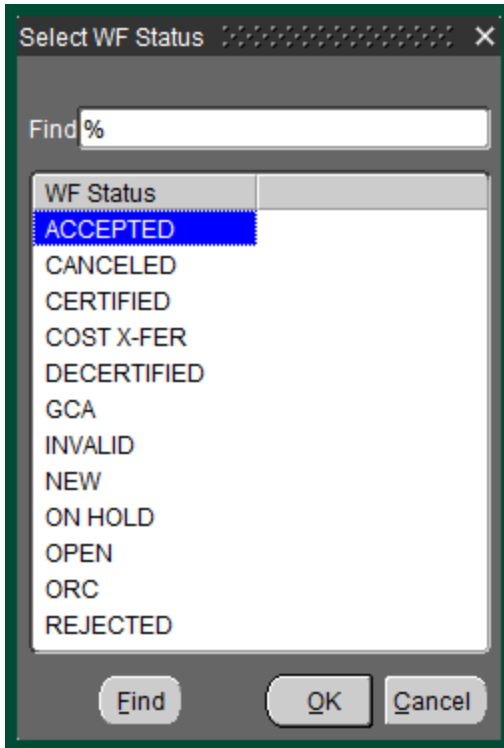
The requestor may elect to query effort reports according to the status of the document by using the **Workflow Status** field.

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Workflow Status

Selecting the LOV in the **Workflow Status** field will return a list of available criteria. For more explanation on the definition of each status, [click here](#).



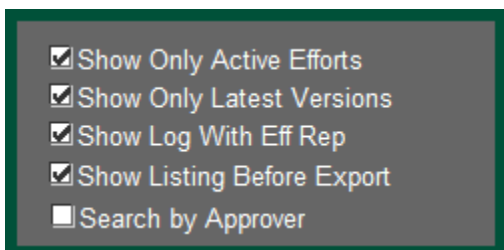
Select WF Status

Find %

WF Status
ACCEPTED
CANCELED
CERTIFIED
COST X-FER
DECERTIFIED
GCA
INVALID
NEW
ON HOLD
OPEN
ORC
REJECTED

Find OK Cancel

The default parameters for the extract are indicated by a check mark. The requestor may select any combination or all of the requests (except for Search by Approver) according to the purpose of the extract.



- Show Only Active Efforts
- Show Only Latest Versions
- Show Log With Eff Rep
- Show Listing Before Export
- Search by Approver

Selecting **Show Only Active Efforts** will extract all effort reports in the following statuses: New, Certified, and Accepted.

Selecting **Show Only Latest Versions** will limit the extract to pull only the most current version of **any** effort report.

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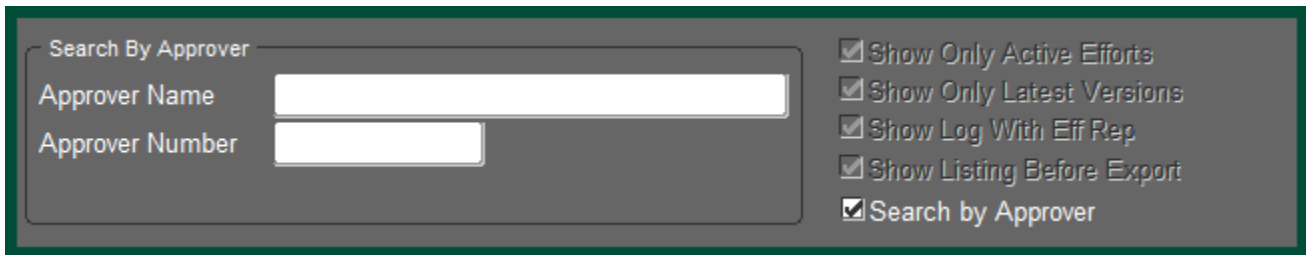
Selecting **Show Log With Eff Rep** will pull the effort report and open the document locator for the report in a separate window.

Selecting **Show Listing Before Export** will allow the requestor to view the list before the data is exported. The viewable data will be an overview of the detail presented in the report.

The requestor may elect to locate a document by searching using the approver's name. In order to do this, select **Search by Approver**. Once this radio button is selected, the other options are no longer available and the **Search by Approver** box is activated. **NOTE: Under the responsibility, UAB Effort Report User, the requestor may utilize the approver search function.**

The **Approver Name** field may be completed manually or by using the LOV. Once the name is selected, the **Approver Number** field will auto populate. The same will occur if the approver number is selected. **NOTE: The approver number is the employee's BlazerID.**

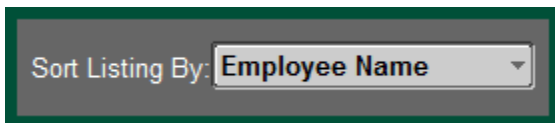
The **Search by Approver** will return a listing of all effort report documents located in an approver's worklist.



The screenshot shows a search interface with the following elements:

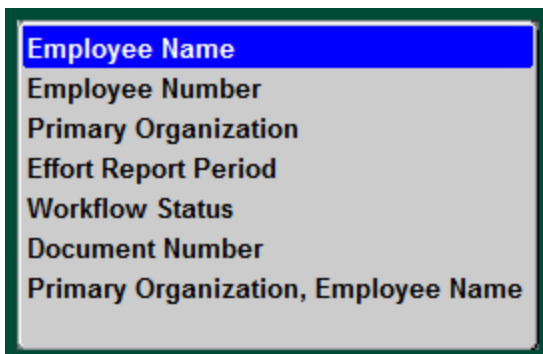
- A section titled "Search By Approver" containing two input fields: "Approver Name" and "Approver Number".
- A list of five checkboxes on the right side, all of which are checked:
 - Show Only Active Efforts
 - Show Only Latest Versions
 - Show Log With Eff Rep
 - Show Listing Before Export
 - Search by Approver

The requestor has the ability to determine how the extract data should be reported. The **Sort Listing By:** field allows the requestor to select from a variety of reporting layout options.



The screenshot shows a dropdown menu labeled "Sort Listing By:" with "Employee Name" selected as the current option.

Clicking on the field will return the report sort parameters from which the requestor may choose.

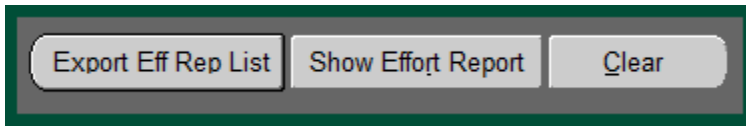


The screenshot shows the dropdown menu expanded, listing the following options:

- Employee Name
- Employee Number
- Primary Organization
- Effort Report Period
- Workflow Status
- Document Number
- Primary Organization, Employee Name

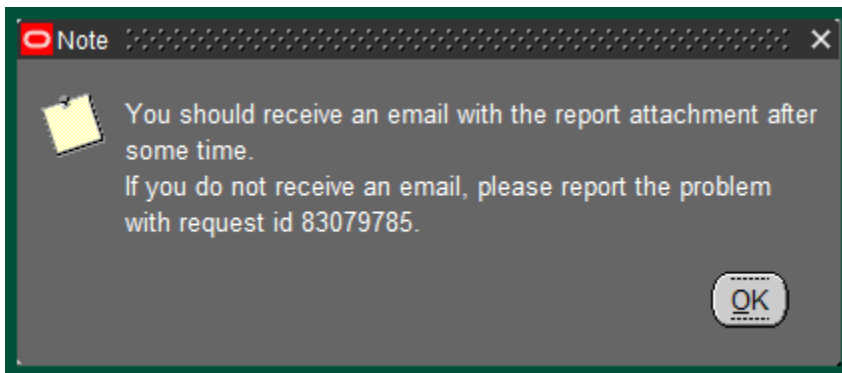
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The action buttons allow the requestor to select the format in which the data will be reported.

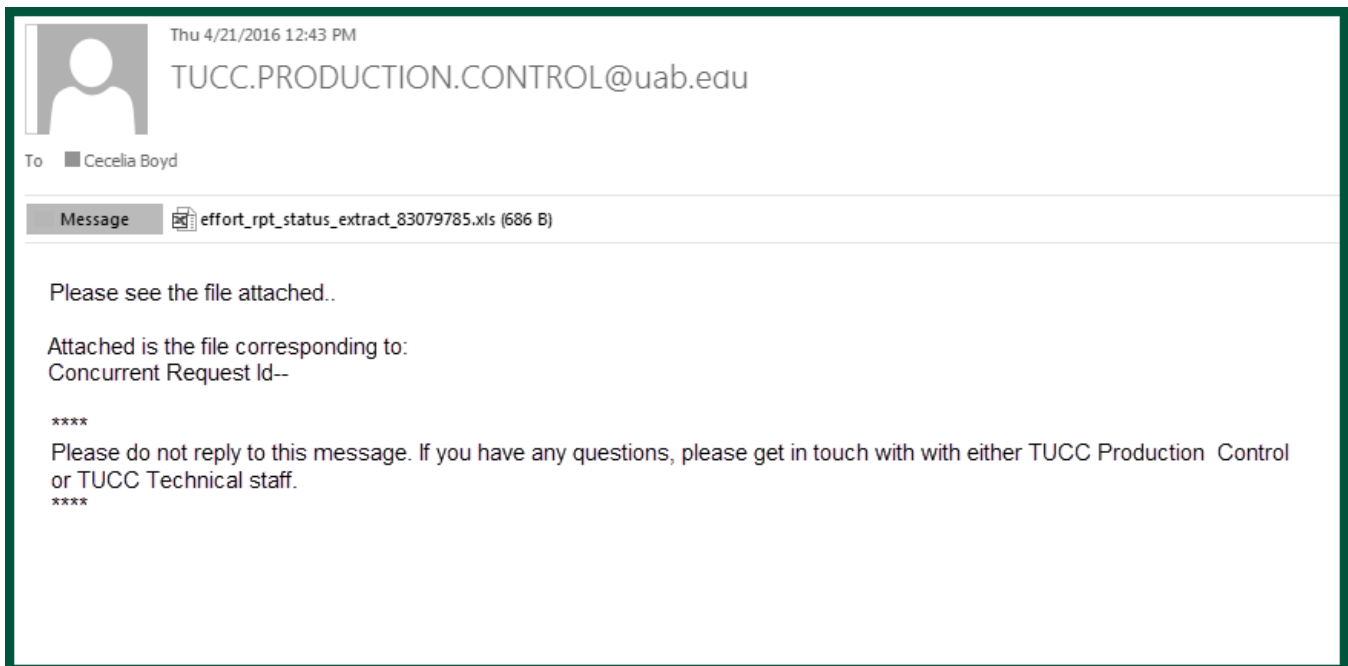


Select **Export Eff Rep List** to have the report generated and sent to the requestor in an email notification.

The **Note** box will notify the requestor that the report has been submitted and will give the report number.



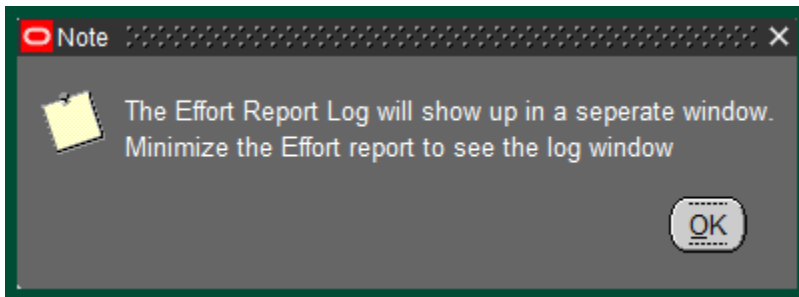
The report will be sent to the requestor as an attachment via an email notification.



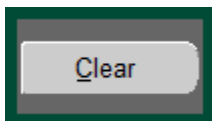
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Select **Show Effort Report** to view the results of the report on the screen.

The **Note** box will notify the requestor that the effort report and log will appear in separate windows.



Select **Clear** to remove all data and refresh the screen.



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