



electronic
Research
Administration



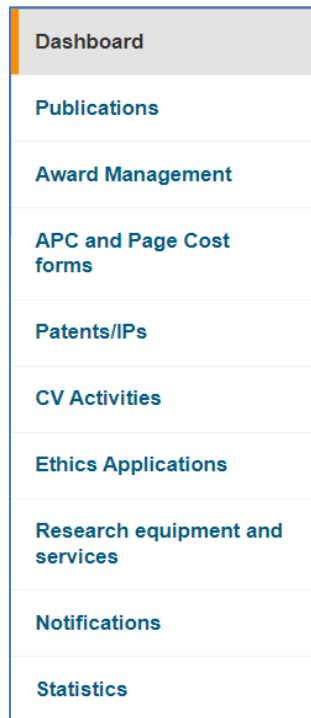
Quick guide to Filtering, Exporting and Reporting on eRA data

Version: 2.1

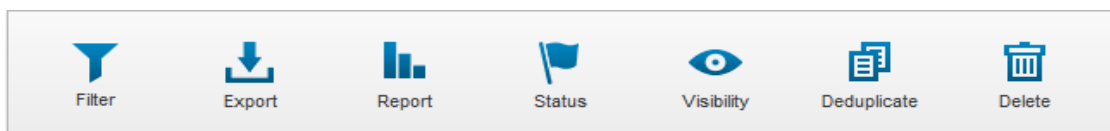
Role(s): Researcher, Central Finance, General Ledger, Postawards Faculty Finance, Finance Debtors, RC&I Contracts Manager, RC&I Admin, Postawards Research Admin

Filtering to find a record within a specific module

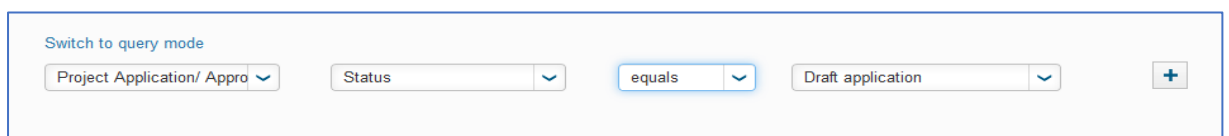
- If you want to filter for a specific form, click on the specific module (Project Applications/Approval Requests, Contracts, etc) on the left-hand navigation bar.



- This will open a list of forms related to that entity.
- Then, click Filter in the action menu bar.



- You will see a number of drop-down search related fields which will help you to narrow down the search for your form/s.
- Select the filter entities related to your search in each of the fields provided. Eg. Project Application/Approval Requests > Status > equals > Draft application. You can add another filter entity row by clicking on the “plus” sign. The more filter rows are added, the more your search is refined.



- Then, click “Apply”.

Reset

Save filter

Apply

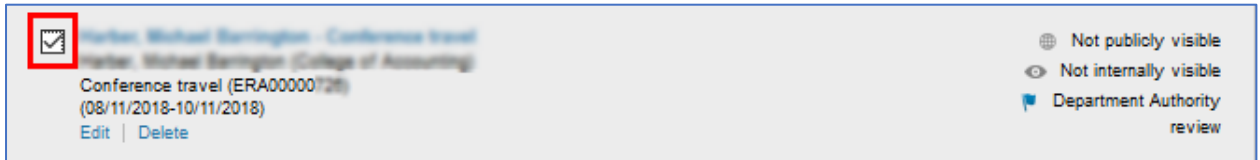
- This will return every application in the system, related to your filter criteria.

Select / Deselect all	Updated on descending	10 50 100	1 of 45
<input type="checkbox"/>	Harber, Michael Barrington - Conference travel Harber, Michael Barrington (College of Accounting) Conference travel (ERA00000728) (08/11/2018-10/11/2018) Edit Delete	<input type="checkbox"/> Not publicly visible <input type="checkbox"/> Not internally visible <input checked="" type="checkbox"/> Department Authority review	
<input type="checkbox"/>	Govender, Dharendra - Conference travel Govender, Dhendra (Division of Anatomical Pathology) Conference travel (ERA00000845) (16/03/2019-21/03/2019) Edit Delete	<input type="checkbox"/> Not publicly visible <input type="checkbox"/> Not internally visible <input checked="" type="checkbox"/> Department Authority review	
<input type="checkbox"/>	Cobb, Janis - Conference travel Cobb, Janis (College of Music) Conference travel (ERA00000988) (17/03/2019-19/03/2019) Edit Delete	<input type="checkbox"/> Not publicly visible <input type="checkbox"/> Not internally visible <input checked="" type="checkbox"/> Department Authority review	
<input type="checkbox"/>	Fitz, William Franz - Conference travel Fitz, William Franz (Dept. of Mechanical Engineering) Conference travel (ERA00000808) (17/06/2019-21/06/2019) Edit Delete	<input type="checkbox"/> Not publicly visible <input type="checkbox"/> Not internally visible <input checked="" type="checkbox"/> Department Authority review	

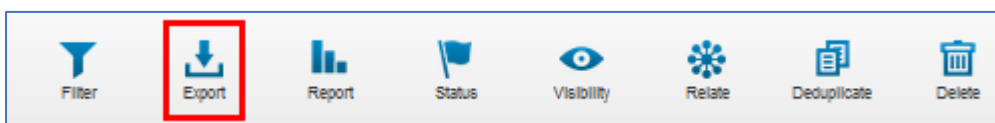
Exporting form data

Exporting of form data allows you to select specific sets of data relative to the fields found on a specific form, and to export this in the form of a report. To export form data, firstly, follow the instructions outlined under **Filtering to find a record**.

- Then, tick the box(es) to select the form/s that you would like to export data from.



- In the action menu bar, click "Export".



- This will bring up a menu of options you can select to define your export format.

Please pick the items to export before you adjust the export settings

Which content do you want to export? ? Selected items All (filtered) items

Do you want to use a template? ? Custom Export Use Template

Export Settings ?

Export format: Convert HTML to plain text
 Include content metadata

Exported Data ?

Content Type: Project Application/ Approval Request

Available attributes:

Relation type:

NB: To select more than one available attribute to add to your export list, select your first attribute, then hold down the CTRL button, scroll down and select more attributes you would like to add to the list.

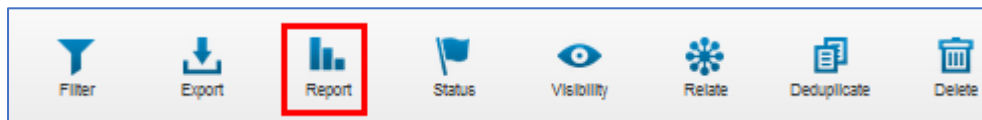
- Once you have made your selection, you can either click "Save Template" if you wish to use this format again in future or click directly on "Export". Your data will be exported in the desired format.

Generating a Report against an Entity

- To generate a report against an entity, firstly, please follow the instructions outlined under **Filtering to find a record**.
- Then, select specific items you want to report on or select all items which have returned using the filter criteria.

<input type="checkbox"/>		
<input checked="" type="checkbox"/>	Barter, Michael Barrington - Conference travel Barter, Michael Barrington (College of Accounting) Conference travel (ERA00000126) (08/11/2018-10/11/2018) Edit Delete	<input type="radio"/> Not publicly visible <input type="radio"/> Not internally visible <input checked="" type="checkbox"/> Department Authority review
<input checked="" type="checkbox"/>	Stevender, Sherrinda - Conference travel Stevender, Sherrinda (Division of Anatomical Pathology) Conference travel (ERA00000842) (16/03/2019-21/03/2019) Edit Delete	<input type="radio"/> Not publicly visible <input type="radio"/> Not internally visible <input checked="" type="checkbox"/> Department Authority review
<input checked="" type="checkbox"/>	Cole, Jane - Conference travel Cole, Jane (College of Arts) Conference travel (ERA00000000) (17/03/2019-19/03/2019) Edit Delete	<input type="radio"/> Not publicly visible <input type="radio"/> Not internally visible <input checked="" type="checkbox"/> Department Authority review
<input checked="" type="checkbox"/>	Fals, William Franz - Conference travel Fals, William Franz (Dept. of Mechanical Engineering) Conference travel (ERA00000000) (17/06/2019-21/06/2019) Edit Delete	<input type="radio"/> Not publicly visible <input type="radio"/> Not internally visible <input checked="" type="checkbox"/> Department Authority review
<input checked="" type="checkbox"/>	Allen, Elizabeth - Conference travel Allen, Elizabeth (Division of Clinical Pharmacology) Conference travel (ERA00000140) (11/11/2018-14/11/2018) Edit Delete	<input type="radio"/> Not publicly visible <input type="radio"/> Not internally visible <input checked="" type="checkbox"/> Department Authority review

- Then, in the action menu bar, click "Report".



- You will be presented with a predefined list of reports which are available on the system.

<input checked="" type="radio"/> Selected Items only	<input checked="" type="radio"/> PDF
<input type="radio"/> Report for all items	
Project Application Overview	
Project Application List	
UCT Travel Conference Report	
Final Outcome	
Scoring Sheet	

- From the list, make your selection. Then click "Create report". This will return your requested report in the desired format.

