ERS Job Aid
How to Build PI/Certifier Listings Using Subscribe Feature

To Build a Report by Subscribe Feature

1. Go to the "Manage Searches" screen and scroll to the bottom
2. Click on "Subscribe"
3. You may search for your PI by Name or by home department. Enter the information in the desired search criteria and click "Update Filter"
4. Under the "My Projects" column select "Subscribe"
5. The column will now indicate that you are "Subscribed" and you may close out of the window.
6. Return to the "Manage Searches" screen and look for the listing that will be save as "My Projects (PI Last, First Name)".
7. To the left of the name you will see 3 icons: View Search, Copy Search and Delete Search. Select the second icon "Copy Search".
8. In the pop-up box enter your desired file name and click on "Save".
9. You now have the search saved in an editable format. To edit the search select the "edit saved search" icon. This will take you to the screen where you may now remove individuals in the search or add new individuals.
   a. To remove individuals:
      1. Go to the listing on the right side of the screen and identify the individual you want to remove.
      2. Click on the blue arrow next to the name and the individual will be removed from your list.
   b. To add individuals:
      1. Go to the top of the screen and in the field "Name/Employee ID contains or equals" enter employee name or employee ID.
      2. Click "Update Filter"
      3. Now scroll down to "Filtered Results" and identify the individual you are looking for
      4. Click on the blue arrow next to the employee name. The employee is now added to your saved search listing.

10. Once you are confident your listing is complete and accurate, scroll to the bottom of the screen and select "save", this will save all changes to the original subscribe search you saved earlier. Your search is now ready to email to your PI or certifier.