The Reporting role is assigned to deans and departmental administrators. As a user with Reporting access in ecrt, you have the ability to log into ecrt to run reports and monitor the departments you are associated to for effort reporting and certification.

Ecrt can be accessed from the WebRaider Portal, under the HSC Finance El Paso tab. Click on the “Effort Certification and Reporting Technology (ecrt)” link found under Accounting > Contracts and Grants Accounting.

The Welcome page is displayed. Click on “Continue.”
Work List:

The Home page or Work List page serves as an entry point to all system functions and offers links to a variety of resources to assist you in effort reporting.

**Navigation Menu Bar** - The primary method of navigating within the system is using the navigation menu bar along the top of the screen. The navigation menu bar is on every screen of the application, allowing you to move from one page to another quickly. When you place the cursor on a label in the navigation menu bar, the available pages to which you can navigate appear in the menu drop-down list. The **Home** menu on the far left returns the user to the **Work List** from anywhere in the application. There are also clickable links available on certain pages of the application that allow you to select for navigation to other pages.

**Left Navigation Bar** - The left navigation bar that is available on the Work List page contains useful links to training documents and other reference material. These links are also displayed in the **Links** drop-down menu in the navigation menu bar, which is available at the top of every page of the application.

Department Dashboard:

The Department Dashboard page makes it easy to monitor the department(s) you are associated to for effort reporting and certification. It contains pertinent information related to your department(s), including the employees, grants and FOPs and allows you to access effort statements for individuals associated to that department.
The Department Dashboard can be accessed by clicking on the “Department Dashboard” link from the Manage navigation menu drop-down located in the navigation menu bar along the top of the screen.

Type the first three letters of the department name or number in the search box and wait for the system to prompt suggestions in a drop-down box. Select the correct department when it appears in the list and click “Choose.”

If you are associated to multiple departments, use the drop-down list to navigate to those departments.

The Department Dashboard page is broken into three tabs: People, Grants and FOPs, and Department Information. At the top of the Department Dashboard page, the department name and number are displayed above the search field. On the right side of the page is a link to the Monthly Funding and Effort Information Report. The link opens the PDF version of the prior month’s report for the department.
The first tab on the Department Dashboard page is the People tab, which contains information about all of the institution’s employees who have a relationship to the department. The Certification Summary Chart allows you to define the statistics to review. You can select the Statement Type – either Base or Non-IBS – using the checkboxes, the Employee Type in a drop-down and the Period in a drop-down. The default search is for Base effort statements for all certifiers in this department for the current Period of Performance. To the right of the Period drop-down is the Related Reports link. When you click on the link, the list of available reports appears. Each of the reports you have access to allow you to monitor key aspects of the effort reporting process. When first accessing the page and no parameters are established, the chart shows the statistics for all statement types and all employee types for the most recent Period of Performance. For each status, it shows the number of individuals in the status and the percentage of the total in each status.

The chart below shows the most common statuses used and gives a brief description of the status.
The **Covered Individuals** List is below the **Certification Summary Chart**. Covered individuals are assigned to a department based on the individual's primary department assignment. The list is divided into four sections:

- **Sponsored** - individuals in this Department who work on sponsored projects
- **Non-Sponsored** - individuals in this Department who do not work on sponsored projects – these statements will be automatically approved
- **Non-Department** - individuals who are in a different home department but work on a grant in this department
- **Terminated**.

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### Most Common Statuses

<table>
<thead>
<tr>
<th>Status</th>
<th>Description of the Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effort Statement Building</td>
<td>This status indicates that an Effort Statement is not yet ready for certification. This occurs during the period of performance when payroll and profile data are being loaded and the Effort Statements are being built.</td>
</tr>
<tr>
<td>Not Certified, Not Processed</td>
<td>This is the status that the Effort Statement is ready to be certified. Effort Statements move to this status when the Certification Period begins and the statement requires an individual to certify.</td>
</tr>
<tr>
<td>Certified, Not Processed</td>
<td>This status indicates that an individual certified/has their Effort Statement, and has been routed for review/approval to the Effort Coordinator. The Effort Statement will remain in this status until that review has been performed.</td>
</tr>
<tr>
<td>Certified, Processed</td>
<td>When the Department Administrator reviews and processes an Effort Statement, the status changes to this. All certified Effort Statements should change into this status by the end of the Certification period.</td>
</tr>
<tr>
<td>Auto Approved</td>
<td>This status is for Effort Statements that are auto-processed by the system. This occurs only when the university utilizes the auto-process functionality in eCPT which automatically moves effort statements that have no sponsored payroll associated to them into status. This will occur on the Certification Period Start Date.</td>
</tr>
<tr>
<td>Certified, Processed, Labor Redistribution Required</td>
<td>This status is when an Effort Statement has been certified by the individual at different percentages than the computed effort. When reviewing the certified effort statement, the Effort Coordinator moves the statement into this status to mark it as a statement where the Certification is correct, but a cost transfer needs to be processed in order to properly align computed and certified effort.</td>
</tr>
<tr>
<td>Labor Redistribution Pending</td>
<td>This is the status of a Certified, Processed Effort Statement when a cost transfer has been loaded into eCPT which will effect the computed effort percentages in that statement. Department Administrators will review this Payroll Adjustment Item and post the Item to the Effort Statement.</td>
</tr>
<tr>
<td>Not Certified, Not Processed, Re-Opened by Labor Redistribution</td>
<td>This is the status of an Effort Statement where a cost transfer was applied and now the statement needs to be re-certified by the individual due to changes in the payroll percentages on the Effort Statement.</td>
</tr>
<tr>
<td>Not Certified, Not Processed, Re-Opened</td>
<td>This is the status of an Effort Statement that has been re-opened by an Effort Coordinator or Central Administrator. Effort Coordinators will only be able to re-open an Effort Statement during the Certification period</td>
</tr>
</tbody>
</table>
The **Covered Individuals** list can be filtered in four ways: name, employee ID, role and employee type. To apply a filter, select the funnel icon to see the list of filters. Then select the appropriate radio button corresponding to the desired filter and select the magnifying glass. If you select the Role or Employee Type filter, the search box is transformed into a drop-down list populated with the options for each. Make your selection from the drop-down list, and click on the magnifying glass to apply the filter. The list refreshes to show the results from your selection. To return, click on the funnel icon, select Name and click on the magnifying glass icon.

The **Covered Individuals** list contains 7 columns for additional information. The first column is the employee’s **Name** followed by the **Alternate Effort Coordinator**, **Employee ID** (or R Number), **Role**, **Employee Type** (which is always Quarterly), **Statements** and **Action** column. For the employee’s **Role** column, if a user has more than one role then hovering over the listed role will display a list of all roles assigned to the person. The **Statements** column will show up to five icons representing the individuals most recent effort statements. If you hover the mouse over the icon of an effort statement the period and status of that statement will display. To review the effort statement simply click on the icon. You are able to review all of the details of the effort statement, but cannot take any action on it. You can review the body of the statement to see how the individual was paid and what they have certified (if the statement has already been certified).

The **Action** column contains the commitments stoplight – hovering the mouse on the commitments stoplight icon displays a popup message that contains commitment monitoring information at a quick glance. The system’s “**stoplight**” (red) icons informs you whether there are any concerns about individuals satisfying their commitments, such as total committed effort is greater than 100%. The **magnifying glass** icon provides a link to the Manage Users page for that individual and the **pen and envelope** icon will send an email to the individual.
The **Grants and FOPs** tab contains all of the Grants and FOPs that are assigned to the department, whether active or inactive. The **Grant Number** and **FOP Number** for each are shown, as is the Grant or FOP **Name**, the **Sponsor** R number, the **PI** of the grant and the **Start Date** and **End Date**. The last column allows you to run the **SPES** report – Sponsored Project Employee Summary. This report lists all of the employees that had salary or cost sharing charged to a specific Grant or FOP. All of the columns are sortable by clicking on the header of the column.

The Grant/FOP **Name** is a link to the **Grant/FOP Summary** page. When you hover over the yellow icon to the left of the **Name**, it indicates that this is inactive.

The **two circular arrows** icon next to the **magnifying glass** allows you to refresh the list to show only the active Grants and FOPs. You can reset the page by clicking on the **magnifying glass**.
The **Department Information** tab contains the information about the department’s effort coordinators and the department relationship tree.

The names, phone numbers, and email addresses of the department’s effort coordinators are shown. The Primary Effort Coordinator is highlighted in yellow. This individual will receive all of the effort processing tasks that are created when individuals certify effort statements. The secondary effort coordinators are listed without highlighting. Any additions or changes to this list will be made by the Central Administrator.

The **Action** column in the Effort Coordinators list allows you to go to the **Manage Users** page for the coordinator by clicking on the **magnifying glass** icon and email the effort coordinator by clicking on the **pen and envelope** icon.

The **Department Relationships** tree shows the department’s position in the organization structure.

**Reporting Functionality:**

There are several reports available on the **ecrt Reporting** page that will assist you in the effort reporting and certification process. The **ecrt Reporting** page can be accessed by clicking on the “**Reports**” label in the navigation menu bar.
The ectl Reporting page contains three window panes across the top that show the report Category, Reports, which shows the list of reports associated to the selected category, and a brief Description of the selected report. To access a report, select the type of report from the Category pane. The list of reports available for the category selected will appear in the Reports pane. Click on the report name in the list of reports in the Reports pane. Below the three panes are two tabs: Parameters and Results. On the Parameters tab, you input the variables influencing the report – the Date range, the Employee Type, the School/Department or Employee name, whatever is relevant to the report. A pop-up window appears with more information about each parameter when you mouse over the “i” icon next to the parameter’s name. Once the correct parameters have been input, click on the “Run Report” button to view the results in the Results tab.
**Certification Status Report** – The **Certification Status Report** can be used to see a list of all certification statements that have a specified status at the time the report is run. This list of statement statuses provides an effective method for you to monitor the certification process during a certification period.

To access the **Certification Status Report**, click on “Management” in the **Category** pane list and then click on “**Certification Status Report**” in the **Reports** pane list.

There are six input fields for parameter selections to run this report. The first section sets the statuses for which you would like to run the report. To do this, use the right arrow to move a status from the **Available Status** into the **Selected Status**. You can move all statuses into the **Selected Status** to provide a broad list of results or you can move only one status to provide a more refined results list. For this example, we will move all **Available Status** to **Selected Status** except **Manual Certification, Processed; No Certification Required, Processed; Certified, Processed**; and **Auto Approved**. These are the statuses that require no further action in the certification process.

**School/Department**: Enter the department for which the report will be run.

**Role**: For this example, no role is selected.

The **Search By Statement Type** defaults correctly to **Base**.

Finally, you enter the date parameters. The first input field is the **Date By** field which correctly defaults to **Dates**. The range of dates for the **Start Date** and **End Date** in the **Dates** section can be set in one of two ways. You can input the start/end dates or select the calendar icon for each to select a date range. The date range used is the start/end dates for the Period of Performance(s).

The alternative way of setting the date range is to select **Employee Type** in the **Date By**: field. This will prompt you to select the **Employee Type** from the drop down list – select **Quarterly**, which will in turn determine the Periods of Performance that can be viewed and selected in the drop down list for **Period**:

When the correct parameters are entered, click on “**Run Report**.”
The report results appear in the **Results** tab. The results display the user’s **Name**, primary **Department**, primary **Effort Coordinator** and **Email** address, **Certifier Email** address, **Certification Period** (Period of Performance dates) and the **Current Status** of the statement. You can sort the results by clicking on the column headers. The icons at the bottom of the report will allow you to view the results in a different format and print the report.

The **ecrt Training** page provides a useful document which contains a description of each of the reports that are available for the user with the Reporting Role in ecrt. The **ecrt Reports by Role** link is located under the All Roles section at the top of the ecrt Training page. To view a report, locate the Reporting Role section in the Table of Contents and click on the name of the report. An overview of the report will appear in a new browser.

If you have additional questions, please email the Effort Reporting Administrators at ECRTElp@ttuhsc.edu.