



AN EFFORT REPORTING SOLUTION FOR



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August 23, 2017

AGENDA

- 1 The ecrt Solution
- 2 Implementation Overview
- 3 Demonstration

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THE ECRT SOLUTION

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FUNCTIONALITY

Functionality highlights.

- **ecrt** functionality was designed from the “ground up” with the flexibility to accommodate an institution’s unique effort reporting process requirements and its organizational complexities
- General Characteristics:
 - Completely web-based
 - User-friendly look and feel
 - Promotes completions of effort certification in a timely manner
 - Easy to configure, customize and maintain

THE ECRT SOLUTION

FUNCTIONALITY

Functionality highlights.

- Integrated Functionality:
 - Easy-to-use basic effort certification functionality
 - Cost sharing management and tracking
- Dashboard Monitoring:
 - Department Dashboard
 - Executive Dashboard
- Reporting:
 - Standard reports for use by administrators, management and auditors
 - IQ ToolSM enables ad-hoc reporting

THE ECRT SOLUTION

GUIDING PRINCIPLES

The ecrt solution is an effective and easy to use solution. The solution strictly adheres to three guiding principles used during the original development

1

Simplicity

Clean interfaces and simple navigational tools make end-user tasks quick and easy to complete.

2

Standardization

A standardized workflow fosters consistent practices across the institutional and establishes common metrics to improve monitoring and reporting capabilities.

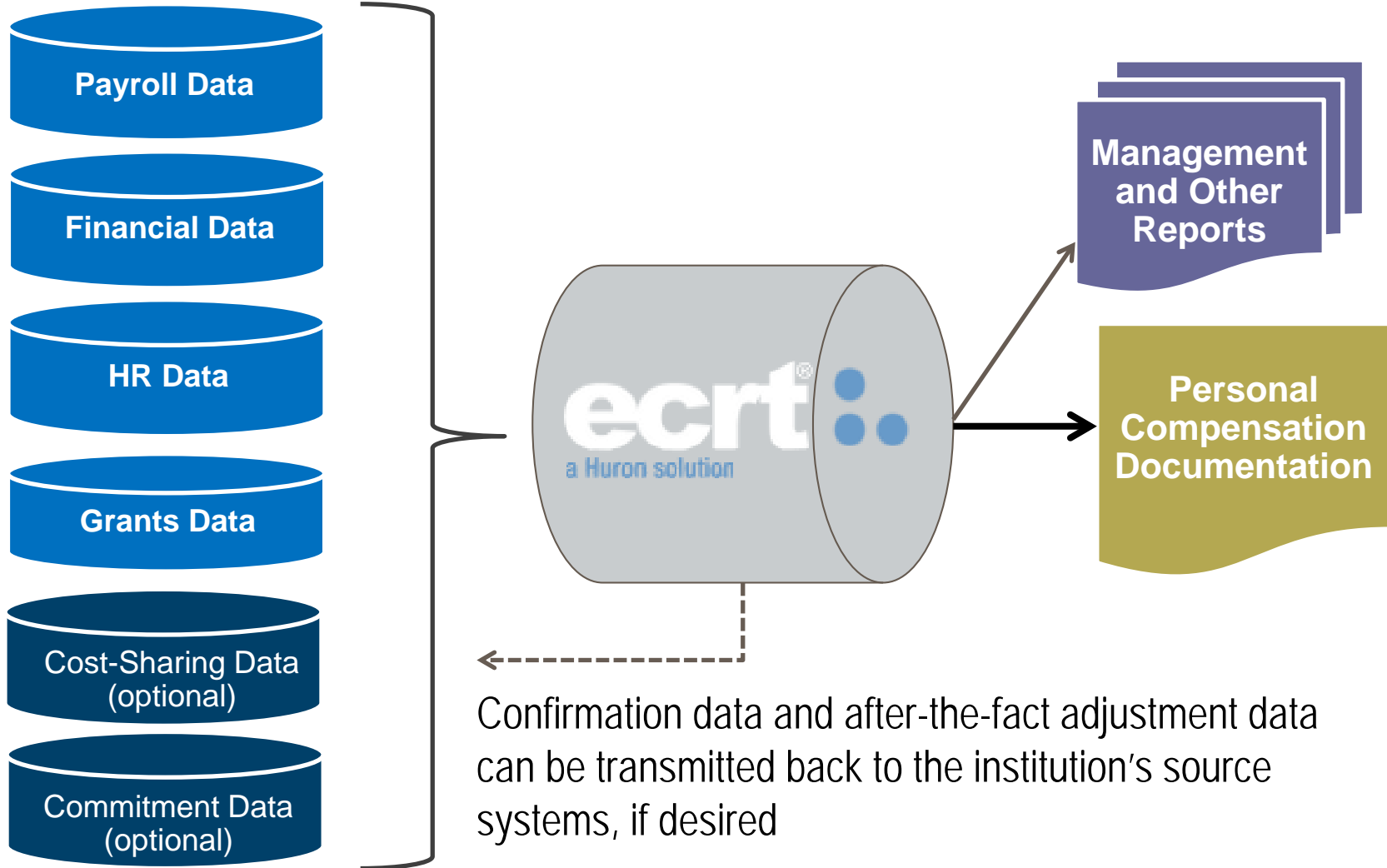
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Compliance

Enhanced real-time reporting and automated notifications help manage institutional compliance.

THE ECRT SOLUTION

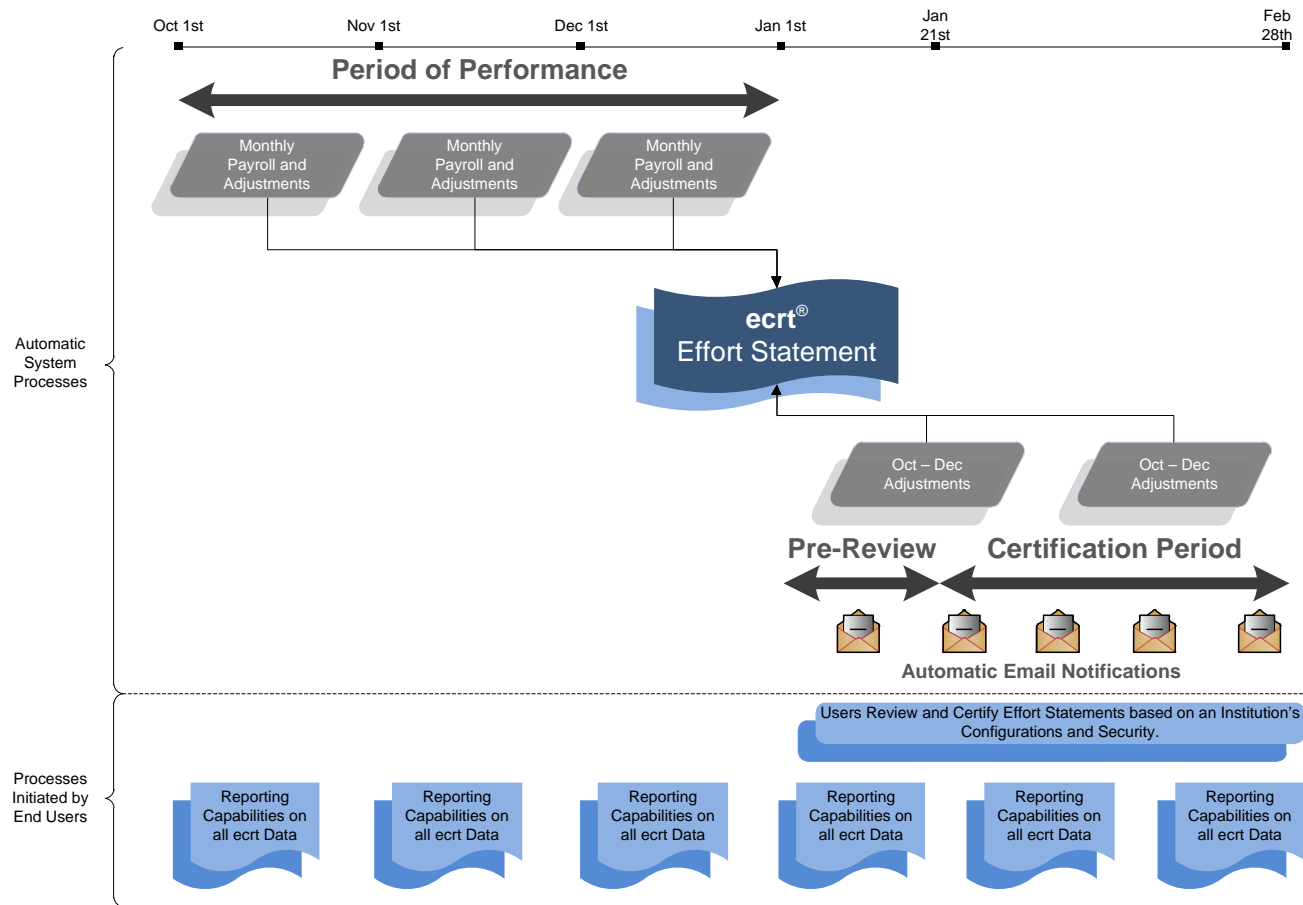
SYSTEM OVERVIEW



THE ECRT SOLUTION

PROCESS FLOW

The diagram assumes quarterly certification, though any certification frequency (or combination of certification frequencies) can be accommodated in ecrt.





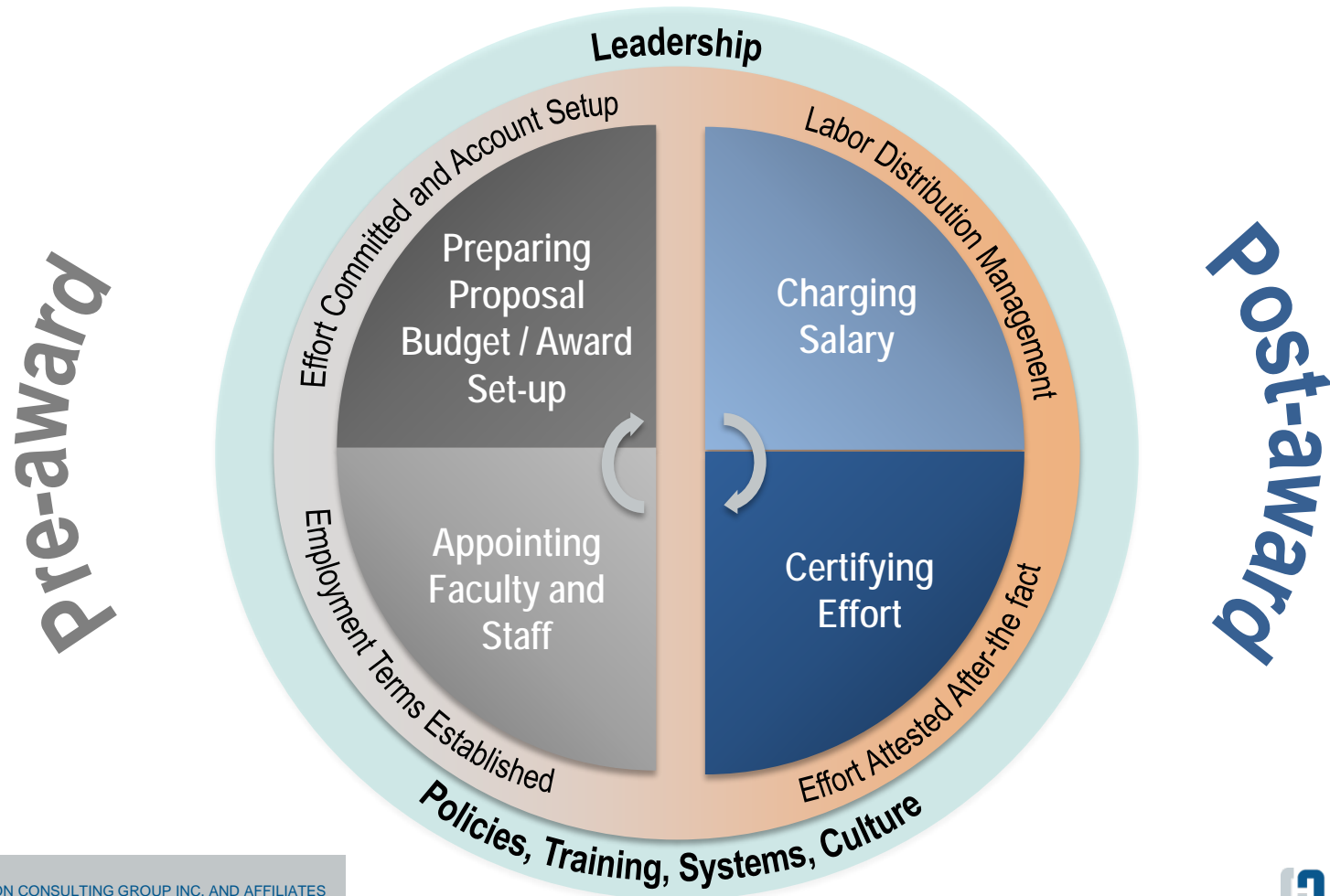
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IMPLEMENTATION OVERVIEW

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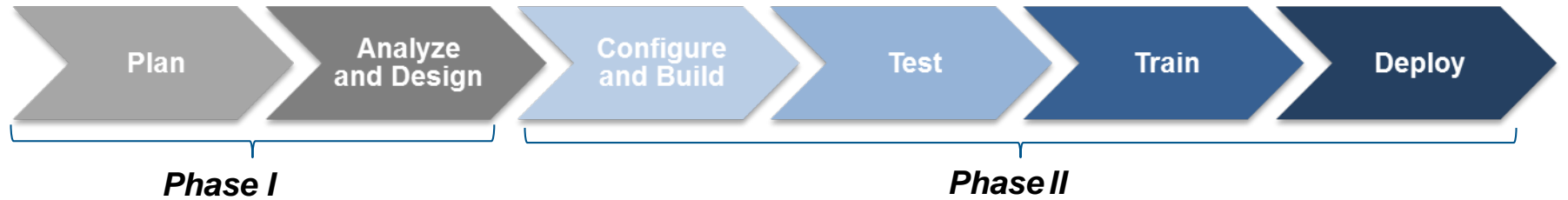
EFFORT REPORTING LIFE CYCLE

Effort Reporting encompasses more than just the certification statement...



IMPLEMENTATION OVERVIEW

IMPLEMENTATION METHODOLOGY



Change Management					
Plan the Project	Analyze and Design	Configure and Build	Test the System	Train Key Personnel	Deploy the System
<p>Key Tasks</p> <ul style="list-style-type: none"> • Kickoff Meetings • Confirm objectives, scope, and approach • Establish project governance, roles, and responsibilities • Project and communication planning <p>Key Deliverables</p> <ul style="list-style-type: none"> • Project organization chart • Detailed project plan • Communication plan 	<p>Keys Tasks</p> <ul style="list-style-type: none"> • Current state assessment (CSA) • “Core Team” introductory training • Future state design • Fit-gap analysis • Initial data extraction and loading <p>Key Deliverables</p> <ul style="list-style-type: none"> • CSA documentation • Future state process flows • Fit-gap documentation 	<p>Keys Tasks</p> <ul style="list-style-type: none"> • Configure effort certification functions • Configure system roles and security • Build test system • Validate loaded data • Configure system look and feel <p>Key Deliverables</p> <ul style="list-style-type: none"> • Configured system • Test environment • Valid data loaded 	<p>Key Tasks</p> <ul style="list-style-type: none"> • Continue data validation • Execute test scripts • Manage/resolve issues • Document testing outcomes • Conduct final User Acceptance Testing <p>Key Deliverables</p> <ul style="list-style-type: none"> • Test Plan • Detailed test scripts • Documentation and analysis of test results 	<p>Key Tasks</p> <ul style="list-style-type: none"> • Develop baseline training materials for PI’s and administrative personnel • Tailor training materials as needed • Prepare training environment • Coordinate and deliver training <p>Key Deliverables</p> <ul style="list-style-type: none"> • Training environment • Baseline training materials for end users 	<p>Key Tasks</p> <ul style="list-style-type: none"> • Readiness assessment • Load and validate production data • Administrators review effort card and initiate cost transfers, if needed • Automate email notification to PI’s to begin certification • Monitor certification progress <p>Key Deliverables</p> <ul style="list-style-type: none"> • Deployment communication documents • Live system with production data

IMPLEMENTATION OVERVIEW

CUTOVER AND TIMELINE

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- CSU will continue with current manual Effort Reporting process through **6/30/17 Period of Performance**
- ecrt will pick up from there and start with a **7/01/17 Period of Performance**
- Certification frequency will be on a **quarterly basis**
- ecrt Go-Live plan for **early January 2018**
 - Initial Certification Period will require separate Certifications for **Q1 FY18 (July – Sept)** and **Q2 FY18 (Oct – Dec)**

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DEMONSTRATION