AN EFFORT REPORTING SOLUTION FOR Colorado State University

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AGENDA

1. The ecrt Solution
2. Implementation Overview
3. Demonstration
THE ECRT SOLUTION
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
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 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.

3. **Compliance**
   Enhanced real-time reporting and automated notifications help manage institutional compliance.
Confirmation data and after-the-fact adjustment data can be transmitted back to the institution’s source systems, if desired.
The diagram assumes quarterly certification, though any certification frequency (or combination of certification frequencies) can be accommodated in ecrt.
IMPLEMENTATION OVERVIEW
Effort Reporting encompasses more than just the certification statement...
IMPLEMENTATION OVERVIEW
IMPLEMENTATION METHODOLOGY

Plan the Project
Key Tasks
• Kickoff Meetings
• Confirm objectives, scope, and approach
• Establish project governance, roles, and responsibilities
• Project and communication planning

Analyze and Design
Keys Tasks
• Current state assessment (CSA)
• “Core Team” introductory training
• Future state design
• Fit-gap analysis
• Initial data extraction and loading

Configure and Build
Keys Tasks
• Configure effort certification functions
• Configure system roles and security
• Build test system
• Validate loaded data
• Configure system look and feel

Test the System
Key Tasks
• Continue data validation
• Execute test scripts
• Manage/resolve issues
• Document testing outcomes
• Conduct final User Acceptance Testing

Train Key Personnel
Key Tasks
• Develop baseline training materials for PI’s and administrative personnel
• Tailor training materials as needed
• Prepare training environment
• Coordinate and deliver training

Deploy the System
Key Tasks
• 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

Key Deliverables
• Project organization chart
• Detailed project plan
• Communication plan

Key Deliverables
• CSA documentation
• Future state process flows
• Fit-gap documentation

Key Deliverables
• Configured system
• Test environment
• Valid data loaded

Key Deliverables
• Test Plan
• Detailed test scripts
• Documentation and analysis of test results

Key Deliverables
• Training environment
• Baseline training materials for end users

Key Deliverables
• Deployment communication documents
• Live system with production data
IMPLEMENTATION OVERVIEW

CUTOVER AND TIMELINE

- **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)**
DEMONSTRATION