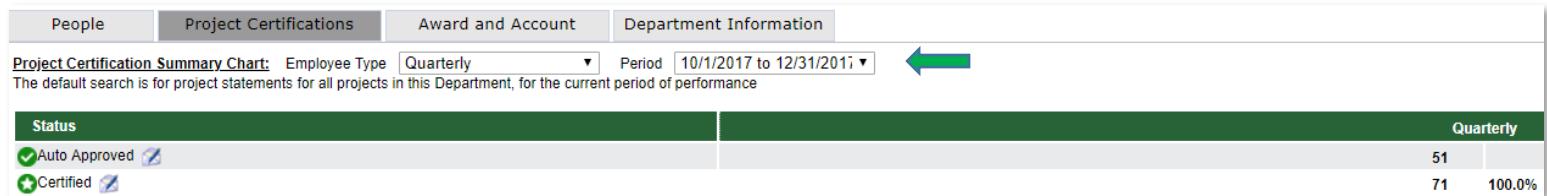


# ecrt Reporting Tips

## Tracking the status of project statements:

- Perhaps the quickest place to track the status of all project statements in your department is from the **Department Dashboard**. The Department Dashboard can be found under the Manage tab > Department Dashboard. A list of all project statements in your department and their current status can be viewed on the Project Certifications tab. This list can be filtered by project name, account number, PI, or Effort Coordinator by clicking on the Select Filter  icon. You can also quickly view the Project Certification Summary for your department by selecting an Employee Type of 'Quarterly' and the quarter you would like to view (the most recent quarter information is pulled in by default).

Manage  
Manage Home  
Look-up  
Department Dashboard



The screenshot shows a report titled "Project Certification Summary Chart" with the following parameters: Employee Type set to "Quarterly", Period set to "10/1/2017 to 12/31/2017". The report displays a summary of project statements across four categories: Auto Approved, Certified, Pending, and Not Started. A green arrow points to the "Period" dropdown.

Status	Count	Percentage
Auto Approved	51	
Certified	71	100.0%
Pending	0	
Not Started	0	

- Another option for tracking your project statements is under the **Management Reports**. You can navigate to the ecrt reporting under the Reports tab > Reporting. Under the Management category, you'll find the [Project Certification Status Summary Report](#) and the [Project Status Report](#). Both can be used to track the number of project statements in a given status.

### Project Certification Status Summary Report:

In the report parameters you can select one, multiple, or all from the Available Status field. To select all, click the double arrow icon.  Once you have the status(es) selected, you can run the report for a particular PI, a specific department, or for all departments you are associated with in ecrt (by leaving the PI and Department fields blank). The report results will display a summary with the number of project statements in each status you selected for the given period. This summary can be quickly downloaded to a PDF or exported to Excel.

Default, Incorrect	Auto Approved	Building (not yet ready for certification)	Ready for Pre Review	Pre Reviewed	Ready for Certification	Certified	Certified, PAR Pending	Ready for Certification, Re-Opened by Payroll Adjustment	Ready for Certification, Re-Opened	No Certification Required	Manual Certification	No Certification Required, PAR Pending	Manual PAR Pending	Revision Requested	Revision Pending
0	51	0	0	0	0	71	0	0	0	0	0	0	0	0	0
0	42	0	0	0	0	48	0	0	0	0	0	0	0	0	0

### Project Status Report:

In the report parameters you can select one, multiple, or all from the Available Status field. To select all, click the double arrow icon.  Once you have the status(es) selected, you can run the report for a particular PI or for an entire department. The report results will display a detailed list of all the project statements in each status you selected for the given period. This includes the Project Name, Project Number, Grant Manager (Effort Coordinator), PI Certifier, PI Department, (Quarter) Nickname, and Current Status. You can open any project statement directly from this report by clicking on the hyperlink in the Current Status column. You can also open an email to the Effort Coordinator or PI directly from this report by clicking the hyperlink on anyone's name. This summary can be quickly downloaded to a PDF or exported to Excel in order to subtotal by PI, add notes, etc.



# ecrt Reporting Tips

## Payroll Reporting:

- Also under Reports > Reporting are some payroll reporting options. Under the Payroll/Cost Share category, you'll find the *Payroll Report* and the *PI and Staff Payroll Report*.

## Payroll Report:

In the report parameters you can choose to run this report for a particular employee, an entire department, or a specific account. If you're searching by Account, keep in mind that you may need to select the 'Inactive' button if we are now beyond the end date of that project.  By default, only Base (Institutional Base

Salary) is selected since that is the basis for CSU's percentage of effort. If needed, including Non-IBS and Other types will also pull in payroll transactions that CSU has excluded from their definition of Institutional Base Salary (i.e. supplemental pay, one-time awards, LTD & STD allowance, etc.). The report results can be sorted and subtotalized by pay period or by account by toggling between the Pay Period View and the Account View. This payroll report can also be accessed by clicking the 'Run Payroll Report' action from within any project statement.



## PI and Staff Payroll Report:

In the report parameters select the PI and time period you're looking for. You can run the report for a specific quarter, an entire year, or for any date range needed (keep in mind that payroll data has only been loaded to ecrf starting from 7/1/2017). The report results will display the full 100% salary breakdown for the PI as well as any other employees paid from the PI's sponsored projects for the given time period. This provides a quick one-stop-shop option if you or your PI need an overview of all the employees working on their projects. These report results can be quickly downloaded to a PDF or exported to Excel.

Parameters		Results																
Results of the PI and Staff Payroll Report are displayed in a scrollable window.																		
Name	Department	Type	Account	Cost Share	Oct (\$)	2017	Oct (%)	2017	Nov (\$)	2017	Nov (%)	2017	Dec (\$)	2017	Dec (%)	2017	Total	% of Total
[REDACTED]	Horticulture + Landscape Architecture	Base	5301304		\$0.00		0 %		\$0.00		0 %		\$276.87		3 %	\$276.87	1 %	
			1306220		\$3,009.50		35 %		\$3,009.50		35 %		\$3,009.50		35 %	\$9,028.50	35 %	
			1576111		\$5,589.06		65 %		\$5,589.06		65 %		\$5,312.19		62 %	\$16,490.31	64 %	
			1591210		\$0.00		0 %		\$0.00		0 %		\$0.00		0 %	\$0.00	0 %	
[REDACTED] Totals:					\$8,598.56		100 %		\$8,598.56		100 %		\$8,598.56		100 %	\$25,795.68	100 %	
[REDACTED] Totals:		Horticulture + Landscape Architecture	Base	5317461	\$0.00		0 %		\$2,249.50		50 %		\$2,249.50		50 %	\$4,499.00	33 %	
[REDACTED] Totals:				5300039	\$4,499.00		100 %		\$2,249.50		50 %		\$2,249.50		50 %	\$8,998.00	67 %	
[REDACTED] Totals:					\$4,499.00		100 %		\$4,499.00		100 %		\$4,499.00		100 %	\$13,497.00	100 %	
[REDACTED]		Horticulture + Landscape Architecture	Base	5330017	\$149.57		50 %		\$0.00		0 %		\$0.00		0 %	\$149.57	28 %	
[REDACTED]				1306361	\$147.23		50 %		\$189.93		100 %		\$0.00		0 %	\$337.16	64 %	
[REDACTED]				1533361	\$0.00		0 %		\$0.00		0 %		\$39.00		100 %	\$39.00	7 %	
[REDACTED]				1591210	\$0.00		0 %		\$0.00		0 %		\$0.00		0 %	\$0.00	0 %	
[REDACTED] Totals:					\$296.80		100 %		\$189.93		100 %		\$39.00		100 %	\$525.73	100 %	