ecrt Workflow and Basic Information
ecrt System Overview

PeopleSoft Payroll Data
PeopleSoft People Data
PeopleSoft Project Data
PeopleSoft Sponsor Data

ecrt®

Management and Other Reports

Effort Certification Form
ecrt Effort Certification Workflow
ECRT Basic Information

System Navigation

Use the following URL to navigate to the Production Environment:

https://ecrt.ku.edu

Use your KU Username and Password to sign into the system.
The Home Page serves as an entry point to all system functions and provides links to a variety of resources to assist users with effort reporting. The new home page presents the Effort Coordinator with up to 3 tabs of information, depending on their access.
The Statements Awaiting Certification tab contains statements that include lines that the Effort Coordinator is responsible for certifying.

As an Effort Coordinator, you will only be able to certify YOUR OWN effort statement (if applicable). If you do not have an effort statement this list will be empty.
The **Associated Certifier** tab displays any statement related to the logged on Effort Coordinator (as long as the EC is the department assigned primary reviewer) that is in a **Not Certified** status. This is a list of any statement that the Effort Coordinator has a connection to that needs to be certified. As statements are certified they will drop off the Effort Coordinator’s Associated Certifiers list. Note that during Pre-Review, if all of the statements from **prior periods have been certified**, the Associated Certifiers tab will be empty. Current period statements can be accessed via the Department Dashboard page, which is discussed in the **Pre-Review** section of this document.
ECRT Basic Information

Tabs

The Menu Bar towards the top of the page contains links to other pages in the system to which the Effort Coordinator has access. These drop down menus can be accessed from any page in the system.
The list below includes a description of each of the pages that an Effort Coordinator is able to access within ecrt.

<table>
<thead>
<tr>
<th>Section</th>
<th>Link</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage</td>
<td>Look Up</td>
<td>Allows the user to search for a person, project, or department within ecrt.</td>
</tr>
<tr>
<td></td>
<td>Department Dashboard</td>
<td>Displays the department details including all the associated individuals and accounts.</td>
</tr>
<tr>
<td>Certify</td>
<td>Certify My Statements</td>
<td>Displays the certification page for the individual logged into the system.</td>
</tr>
<tr>
<td>Reports</td>
<td>Reports</td>
<td>Displays the standard reports menu, allowing the running or exporting of built in reports.</td>
</tr>
<tr>
<td>Administration</td>
<td>Manage Users</td>
<td>Used to review demographic information about users, including check to see their department relationships, proxy relationships, and the role(s) to which they have been assigned.</td>
</tr>
</tbody>
</table>
ECRT Basic Information

Online Help

Most screens contain a help icon available in the upper right portion of the page.

Clicking this button will bring up a separate window containing help on the portion of the system currently being worked in. This is a general help guide, if the Effort Coordinator has specific KU process questions, contact the Central Administrator at ecrt@ku.edu.
At various points in the application, a data entry box is presented. The system will search on the character string that is entered, and return all items that include the string entered. The Effort Coordinator can then select from among the choices by clicking on a selected choice. All search boxes use this methodology. The user types in a minimum of three characters (letters or numbers) from the intended result, and then pauses for a few seconds. The program will query the database, and download a list of matches to the search text, which appears in box under the search box.
ECRT Basic Information

Search Bar

eCRT has a Search Bar that is available at the top of every page (if the Effort Coordinator has been given this right). The Effort Coordinator can search for a person (to go to their effort statement), account (to go to the account summary page), or department (to go to the department dashboard page).

If the Effort Coordinator enters enough criteria that only one result exists, the system will automatically take the Effort Coordinator to the next page (no additional clicks are necessary). If multiple results exist, a message displays under the search bar and the Effort Coordinator can click the magnifying glass to see the potential results.

Note: Pressing the Enter/Return Key will not execute the search when there are multiple results. You must click the search icon.

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Note: Pressing the Enter/Return Key will not execute the search when there are multiple results. You must click the search icon.
When the Effort Coordinator has multiple results in the search, the Look Up page will display and filter the results based on category (person, account, or department). The Effort Coordinator can click on the requested result, or continue to enter criteria until only one result is left and the system will automatically take the Effort Coordinator to the next page.

The Effort Coordinator can navigate directly to the look up page using the “Look Up” link in the Manage tab of the Navigation Bar.
The Left Navigation Bar will be populated with links that provide access to Policy and Procedure documents as well as training materials for specific roles.
Effort Statement Statuses

Process Flow

1. Certifier Reviews Effort Card
2. Is Effort Accurate?
   - Yes: Check all boxes and click certify button
   - No: Certifier should update Effort Card to reflect appropriate effort
3. Check all boxes and click certify button
4. Threshold?
   - Yes: Effort Coordinator Receives a Task & Reviews Card
   - No: Effort Coordinator Initiates an RFA
5. Is change to effort accurate?
   - Yes: Effort Coordinator Initiates an RFA
   - No: Under Threshold
6. RFA Processed in PeopleSoft
Effort Statement Statuses

Process Flow-Recertification

e.crt Recertification Workflow

1. RFA is processed in PeopleSoft
2. Data is fed from HR/Pay directly to e.crt
3. Threshold?
   - Under Threshold: Statement remains certified and processed (no further action needed)
   - Over Threshold:
     - A new task will be created for the Effort Coordinator
     - The effort card will reopen for certifier
     - Certifier will need to recertify - refer to Certification workflow