

Monitoring Reports: A Guide for Monitoring Progress in ecr

To navigate to the reports page, click reports at the top of the homepage, as indicated by the purple arrow.

The screenshot shows the top navigation bar of the ecr system. The 'Reports' menu item is highlighted with a purple arrow. Below the navigation bar, the page title is 'Work List for Vena Farr A'. A welcome message follows, and there are sections for 'Statements Awaiting Confirmation (0)', 'Quarterly Project Confirmations', and 'Associated Sub-Project Confirmations (View-Only)'. Each section contains a table header with columns: Project Title, Project Number, Sponsor, Period, Due Date, Status, and Staff. The content of these tables is currently empty, indicating no data is associated with the user.

Department Account Report

1. From the reports page, select “Management” from the category options. Then select “Department Account Report” under the “Reports” section.

The screenshot shows the 'Department Account Report' configuration page. It features a table with three columns: 'Category', 'Reports', and 'Description'. The 'Category' column lists 'Management', 'Payroll/Cost Share', and 'UKY Custom Reports'. The 'Reports' column lists 'Department Account Report', 'Certification Status Report', 'Project Certification Status Summary Report', and 'Project Status Report'. The 'Description' column provides details about the Department Account Report, including instructions on how to run it and the format of the results. Below the table, there are tabs for 'Parameters' and 'Results'. A search field labeled 'School / Department:' is present, along with an 'Expand Search' link and a 'Run Report' button.

2. In the parameters, type in the name of the department that needs to be reviewed.

Parameters Results

School / Department:

[Expand Search](#)

Run Report

3. Click “Run Report.”

4. The results will display a comprehensive list of all of the accounts (cost centers and WBS elements) that are associated with this department.


Parameters Results

Based on your report selection below are the results. Please note that you can **sort the results** by clicking on the column header.

15 items found, displaying all items.

Number	Name	PI	Sponsor Name
3210445888	Alaska English Language Arts	Steve Meadows - 99887704	National Cancer Institute
3049110000	Effects of Space Training Programs	Mike Kelley - 99887703	National Institute of Child Health and
3048990008	Endocardium Formation During Heart Developmen	Tim Karoli - 99887705	National Institute of Child Health and
3048990005	Inhibition of Translation Initiation in Cancer Therapy	Tim Karoli - 99887705	National Institute of Child Health and
3048990003	Molecular Electronics	Steve Meadows - 99887704	National Institute of Child Health and
3048990006	National Space Biomedical Research Institute Core Research Program	Tim Karoli - 99887705	National Institute of Child Health and
3048990004	Quantitative Numbers and Math	Mike Kelley - 99887703	National Institute of Child Health and
3210445577	Robust and Accurate Visual SLA	Steve Meadows - 99887704	National Cancer Institute
3048990001	Studies on being a Scientist	Mike Kelley - 99887703	National Institute of Child Health and
3049003336	Subcontract 3A - Flooring	Mike Kelley - 99887703	National Institute of Child Health and
3049003334	Thin Composite Two-Way Flooring	Steve Meadows - 99887704	National Institute of Child Health and
3048990002	Training Program in Financial Management	Mike Kelley - 99887703	National Institute of Child Health and
3049003333	Training Program in Financial Management	Tim Karoli - 99887705	National Institute of Child Health and
1000567891	University of Kentucky NonSponsored Funding	N/A	N/A
3210445581	cPass Activities	Steve Meadows - 99887704	National Cancer Institute

15 items found, displaying all items.

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5. Check for any missing or new accounts to make sure that all accounts that need to be monitored are included. Notice that from the bottom of the results, this report is available to be exported into Excel or Adobe PDF, by selecting the links at the bottom indicated by the yellow arrow.

Project Certification Status Summary Report

1. From the Reports page, select Management under the categories. In the “Reports” section, select “Project Certification Status Summary Report.”

The screenshot shows the 'eect Reporting' interface. The top navigation bar includes Home, Certify, Manage, Reports, Administration, and Links. The main content area is titled 'eect Reporting' and contains a table with three columns: Category, Reports, and Description. The 'Category' column lists Management, Payroll/Cost Share, and UKY Custom Reports. The 'Reports' column lists Department Account Report, Certification Status Report, Project Certification Status Summary Report (highlighted), and Project Status Report. The 'Description' column provides details about the report's purpose and usage. Below the table, there are tabs for Parameters and Results. The Parameters section includes an 'Available Status' dropdown menu with options like 'Default, Incorrect', 'Auto Approved', 'No Confirmation Required', 'Manual Confirmation', 'No Confirmation Required, Payroll Pending', and 'Manual Confirmation, Payroll Pending'. A 'Selected Status' dropdown menu is also present, with blue arrows between them for moving items. There are also fields for 'Pt:', 'School / Department:', 'Date By:' (with radio buttons for 'Dates' and 'Employee Type'), and 'Dates:' (with 'Start Date' and 'End Date' fields). A 'Run Report' button is located at the bottom left.

2. In the parameters section, select the statuses to review and move them using the blue arrows between the “Available Status” and “Selected Status” boxes. All statuses may be selected by using the double arrow button.
3. This report must have either a PI selected or a School/Department. Enter that information in the appropriate field. Note: To see everything from the college level and below, put in the highest level from the hierarchy, for example College of Medicine, College of Agriculture, College of Law, etc.
4. Using the radio buttons, select either “Dates” to run by a date range (to look at multiple quarters) or select “Employee Type” and then choose Kentucky for “Employee Type” and then select the quarter to view.

Parameters Results

Available Status
 [Available Options]

Selected Status
 [Available Options]
 Default, Incorrect
 Auto Approved
 No Confirmation Required
 Manual Confirmation
 No Confirmation Required, Payroll Pending
 Manual Confirmation, Payroll Pending

PI: _____

School / Department: Hurontesting-Huron Testing Department

[Expand Search](#)

Date By: Dates Employee Type

Dates: Start Date: 07/01/2015 End Date: 12/31/2015

Run Report

Parameters Results

Available Status
 [Available Options]

Selected Status
 [Available Options]
 Default, Incorrect
 Auto Approved
 No Confirmation Required
 Manual Confirmation
 No Confirmation Required, Payroll Pending
 Manual Confirmation, Payroll Pending

PI: _____

School / Department: Hurontesting-Huron Testing Department

[Expand Search](#)

Date By: Dates Employee Type

Employee Type: Kentucky

Period: 6/28/2015 to 9/30/2015

Run Report

5. Click "Run Report" to display results.

Parameters Results

Department Name	Default, Incorrect	Auto Approved	In Progress	Ready for Pre Review	Pre Reviewed	Ready for Confirmation	Confirmed	Confirmed, Payroll Pending	Ready for Confirmation, Re-Opened by Payroll Adjustment Reconciliation	Ready for Confirmation, Re-Opened	No Confirmation Required	Manual Confirmation	No Confirmation Required, Payroll Pending	Manual Confirmation, Payroll Pending	Revision Requested	Revision Pending
Huron Testing Department	0	1	0	1	0	2	2	0	0	0	0	0	0	0	4	0

Excel | XML | PDF | RTF

6. Results are a summary of how many statements are in each status for the departments that are selected. If this report is generated for results at a college level, there will be rows for each department. This is a very high level report to be able to see the number of project statements and where they are in the workflow process.

7. This report is exportable to Excel or PDF by selecting the links from the bottom of the results page, as indicated by the yellow arrow.

Project Status Report

1. From the Reports page, under “Category” select “Management” and then under the “Reports” section Select “Project Status Report.”

The screenshot shows the 'Project Reporting' interface. At the top, there are three columns: 'Category', 'Reports', and 'Description'. The 'Category' column has 'Management' selected. The 'Reports' column has 'Project Status Report' selected. The 'Description' column contains text: 'The Project Status Report displays a list of all project statements that have a specified status at the time the report is run. You must choose the status(es) to be included, employee type or date range, Department or certifier.' Below these columns are tabs for 'Parameters' and 'Results'. The 'Parameters' section includes:

- Available Status:** A list of status options with blue arrows to move them to the 'Selected Status' box.
- Selected Status:** A list of selected status options.
- PI:** A text input field.
- School / Department:** A text input field.
- Expand Search:** A button.
- Date By:** Radio buttons for 'Dates' and 'Employee Type'.
- Dates:** Start Date and End Date input fields with date pickers.
- Run Report:** A button.

2. In the parameters section, select the statuses to review and move them using the blue arrows between the “Available Status” and “Selected Status” boxes. All statuses may be selected by using the double arrow button.
3. This report must have either a PI selected or a School/Department. Enter that information in the appropriate field. Note: To see everything from the college level and below, put in the highest level from the hierarchy, for example College of Medicine, College of Agriculture, College of Law, etc.
4. Using the radio buttons, select either “Dates” to run by a date range (to look at multiple quarters) or select “Employee Type” and then choose Kentucky for “Employee Type” and then select the quarter to view.

The screenshot shows the 'Parameters' section of the Project Status Report configuration page. The 'Available Status' list includes: 'Default, Incorrect', 'Auto Approved', 'No Confirmation Required', 'Manual Confirmation', 'No Confirmation Required, Payroll Pending', and 'Manual Confirmation, Payroll Pending'. The 'Selected Status' list includes: 'Ready for Pre Review' and 'Pre Reviewed'. The 'PI' field contains 'Kelley Mike - 99887703'. The 'School / Department' field is empty. The 'Date By' radio buttons are set to 'Employee Type'. The 'Employee Type' dropdown is set to 'Kentucky'. The 'Period' dropdown is set to '6/28/2015 to 9/30/2015'. The 'Run Report' button is visible at the bottom.

5. Once you have the parameters set, click “Run Report.”

Parameters		Results					
Project Nickname	Project Number	Grant Department	Grant Manager	PI Certifier	PI Department	Nickname	Current Status
New Techniques in Taxidermy	3048990011	Huron Training Department	Jordan, Michael - mjordan1	Kelley, Mike - 99887703	Huron Testing Department	FY16 Quarter 1	Ready for Pre Review
Training Program in Financial Management	3048990002	Huron Testing Department	Jordan, Michael - mjordan1	Kelley, Mike - 99887703	Huron Testing Department	FY16 Quarter 1	Ready for Pre Review

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6. The report generates a list of statements in the statuses that you selected. You can click on the “Current Status” hyperlink for any statement on the report to be routed to the project statement page. This report can also be exported to Excel or PDF to save for later.

All Grants with ECs and GMs

1. From the reports page, under “Category” you will select “UKY Custom Reports” and select “All Grants with ECs and GMs” from the reports section.

The screenshot shows the UKY Reporting interface. At the top, there is a navigation bar with the UKY logo and links for Home, Certify, Manage, Reports, Administration, and Links. Below this is a search bar with the text "Welcome, Vena Farr Å" and "Sign Out". The main content area is titled "Report Reporting" and contains three columns: "Category", "Reports", and "Description". The "Category" column has "UKY Custom Reports" selected. The "Reports" column has "All Grants With ECs and GMs" selected. The "Description" column shows "All Grants With ECs and GMs". Below the report selection area, there are tabs for "Parameters" and "Results". A purple arrow points to a "Run Report" button.

2. Select “Run Report” under the parameters as indicated by the purple arrow above.

3. The results will display as a list as shown below. This will list only the grants that are associated to the college/departments that you are associated with. The columns indicate the grant number, the grant name, the effort coordinator, if the effort coordinator is primary, and the grant manager if applicable.

Grantnumber	Grantname	Ec	Is ec primary	Grant_manager
3048990001	Studies on being a Scientist	99887717 - Farr A, Vena	F	NA
3048990001	Studies on being a Scientist	mJordan1 - Jordan, Michael	T	NA
3048990002	Training Program in Financial Management	99887717 - Farr A, Vena	F	NA
3048990002	Training Program in Financial Management	mJordan1 - Jordan, Michael	T	NA
3048990003	Molecular Electronics	mJordan1 - Jordan, Michael	T	NA
3048990003	Molecular Electronics	99887717 - Farr A, Vena	F	NA
3048990004	Quantitative Numbers and Math	99887717 - Farr A, Vena	F	NA
3048990004	Quantitative Numbers and Math	mJordan1 - Jordan, Michael	T	NA
3048990005	Inhibition of Translation Initiation in Cancer Therapy	mJordan1 - Jordan, Michael	T	NA
3048990005	Inhibition of Translation Initiation in Cancer Therapy	99887717 - Farr A, Vena	F	NA
3048990006	National Space Biomedical Research Institute Core Research Program	99887717 - Farr A, Vena	F	NA
3048990006	National Space Biomedical Research Institute Core Research Program	mJordan1 - Jordan, Michael	T	NA
3048990007	Research Network on Mind-Body Interactions	mJordan1 - Jordan, Michael	T	NA

Note: Effort Coordinators on this report include any college effort coordinators, primary department effort coordinators, and backup department effort coordinators. The column “Is ec primary” will be set to “T” if the effort coordinator is the primary department effort coordinator.

- Review the information to make sure that you recognize the people associated with the projects.

Statements That Have Not Been Pre-Reviewed

- From the reports page, under “Category” you will select “UKY Custom Reports” and select “Statements That Have Not Been Pre-Reviewed” from the reports section.

The screenshot shows the UKY reporting system interface. At the top, there is a navigation bar with the UKY logo and a search bar. Below the navigation bar, there are tabs for Home, Certify, Manage, Reports, Administration, and Links. The main content area is titled "ecrt Reporting" and contains a table with three columns: Category, Reports, and Description. The "Category" column has "UKY Custom Reports" selected. The "Reports" column has a list of reports, with "Statements That Have Not Been Pre-Reviewed" selected. The "Description" column shows the description for the selected report. At the bottom of the interface, there are tabs for Parameters and Results, and a "Run Report" button.

2. Under the “Parameters” click “Run Report.”

Parameters		Results						
18 Items found, displaying all items.								
Project	Department	Status	Period	Pec	Grant manager			
3048990001	Hurontesting	Ready for Pre Review	FY16 Quarter 3	Michael Jordan	NA			
3048990002	Hurontesting	Ready for Pre Review	FY16 Quarter 1	Michael Jordan	NA			
3048990002	Hurontesting	Ready for Pre Review	FY16 Quarter 2	Michael Jordan	NA			
3048990002	Hurontesting	Ready for Pre Review	FY17 Quarter 1	Michael Jordan	NA			
3048990003	Hurontesting	Ready for Pre Review	FY17 Quarter 1	Michael Jordan	NA			
3048990004	Hurontesting	Ready for Pre Review	FY16 Quarter 3	Michael Jordan	NA			
3048990007	Hurontraining	Ready for Pre Review	FY16 Quarter 3	Michael Jordan	NA			
3048990008	Hurontraining	Ready for Pre Review	FY16 Quarter 3	Michael Jordan	NA			
3048990009	Hurontraining	Ready for Pre Review	FY16 Quarter 3	Michael Jordan	NA			
3048990010	Hurontraining	Ready for Pre Review	FY16 Quarter 3	Michael Jordan	NA			
3048990010	Hurontraining	Ready for Pre Review	FY16 Quarter 1	Michael Jordan	NA			
3048990010	Hurontraining	Ready for Pre Review	FY16 Quarter 2	Michael Jordan	NA			
3048990011	Hurontraining	Ready for Pre Review	FY16 Quarter 1	Michael Jordan	NA			
3048990011	Hurontraining	Ready for Pre Review	FY16 Quarter 2	Michael Jordan	NA			
3049003334	Hurontesting	Ready for Pre Review	FY16 Quarter 2	Michael Jordan	NA			
3049003334	Hurontesting	Ready for Pre Review	FY16 Quarter 3	Michael Jordan	NA			
3049003336	Hurontesting	Ready for Pre Review	FY16 Quarter 3	Michael Jordan	NA			
3210445888	Hurontesting	Ready for Pre Review	FY16 Quarter 3	Michael Jordan	NA			
18 Items found, displaying all items.								
								Excel XML PDF RTF

3. This report gives you a list of all of the statements that are outstanding to be Pre Reviewed with the grant number, department, current status, period, primary department effort coordinator and a grant manager (if applicable). This would be a good report to run once we are in the confirmation period in order to determine what statements are outstanding.