Monitoring Reports

ecrt contains several reports to monitor the confirmation process. From the Navigation Menu, click Reports, and click Reporting.

Project Status Report

Management>Project Status Report

The Project Status Report shows a list of all Project Statements that have a specified status at the time the report is run. Select the status(es) for which to run the report by using the right arrow to move a status from the Available Status box into the Selected Status box. Next, enter the PI and/or department or school for which to run the report. Finally, enter the date parameters or select Employee Type. If Employee Type is selected, select “WMU” from the drop-down menu.

When the parameters are entered, select Run Report and the results will appear. The report generates a list of all Project Statements that match the parameters. The results display the Project’s Nickname, Project Number, Grant Department, Grant Manager, PI Certifier, PI Department, (Period) Nickname, and the Current Status of the project statement for the period. These results can be exported to EXCEL.
PI and Staff Report

Payroll/Cost Share > PI and Staff Report

The PI and Staff Report displays a list of all individuals with all individuals charging a PI’s account(s) and their monthly salary charges on every account they are charging. The first input field is the name of the PI for whom the report is being generated. Select the IBS checkbox in the “Search by Statement Type” field. Then, enter the date parameters or select Employee Type. If Employee Type is selected, select “WMU” from the drop-down menu.

When the parameters are entered, select Run Report and the results will appear. The Name of the PI and his/her staff are listed with their corresponding payroll information for the dates entered in the parameters. The payroll information includes all accounts the person was paid from for the period. These results can be exported to EXCEL.
SPES Summary Report

The Sponsored Project Employee Summary (SPES) Summary report lists all employees that had salary charged or cost shared to a specific project for the specified date range selected. The first input field is the Account for which the report is being generated. Then, enter the date parameters or select Employee Type. If Employee Type is selected, select “WMU” from the drop-down menu.

When the parameters are entered, select Run Report and the results will appear. The report will show the employee’s total payroll and cost share for the selected date range and selected account. These results can be exported to EXCEL.