

## Primary Effort Coordinator – Quick Guide

### ECRT: Accessing the System

#### Logging into Ecart

Access ecart by going to: <https://ecrt.fiu.edu/ecrt/>

Enter your login credentials (*Figure 1*):

Username = **Panther ID**

Password = FIU MyAccounts Password

**Figure 1**

### Organizational Department Dashboard

To access the department dashboard, select "Organizational Department Dashboard" under the manage section on the blue navigation bar (*Figure 2*).

If you are an effort coordinator for more than one department/division, you can select another department/division from the drop down box at the top of the page (*Figure 3*).



**Figure 2**

### Organizational Department Dashboard

**Figure 3**

## Effort Coordinator Work List

Upon successful login to ECRT, effort coordinators will see their work list. This view is specific to the roles and rights given to an effort coordinator. The ECRT work list is designed to help make tasks easier by putting them all directly on your homepage.

An effort coordinator’s work list contains three tabs: Statements Awaiting Certification, Effort Tasks and Associated Certifiers.

1. **Statements Awaiting Certification:** You will only see those items in which you have access to certify ‘at least’ one line item in the effort card. Any effort statements awaiting certification that list a non-sponsored id that corresponds to the effort coordinator’s assigned department will be listed on this tab.
2. **Effort Tasks:** lists statements that require the effort coordinator’s action. Statements that have been certified but await the effort coordinator’s approval or action will appear here.
3. **Associated Certifiers:** This tab contains a complete list of all of the effort coordinator’s associated certifiers. From this list, the effort coordinator may access a specific researcher’s statement.

## Effort Tasks

Tasks that await the effort coordinator’s action will appear in this tab (Figure 4).

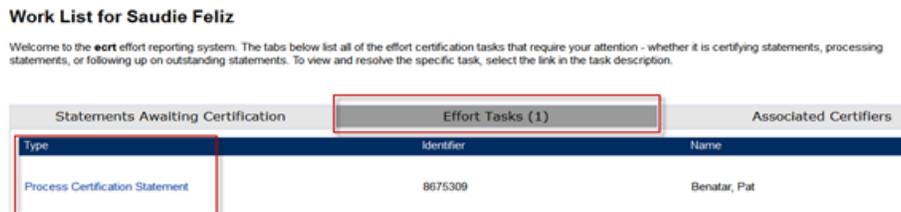


Figure 4

## Processing Certification Statement

This type of task includes statements that have been certified by the certifier yet await the effort coordinator’s approval. Until approved, the item will remain under the effort task list.

**Note:** If the individual effort lines on the effort card were not adjusted at the time of certification, the card will be ‘auto-processed’ and no further action will be required on the effort coordinator’s part. The threshold per line on the effort card is 1%. If a line item on the effort is adjusted with a variance of **more than** 1%, the card will not be auto processed and will require effort coordinator review.

The effort coordinator is responsible for reviewing each statement and may choose one of three options (Figure 5):

1. If everything looks appropriate, click the *Process* button at bottom to release the effort card into *Certified, Processed* status.
2. If you need further time to review or discuss with the certifier or PI, click *Cancel*. This action will take you back to your effort tasks list where you will be able to review additional certified effort cards.
3. If you believe the certification is incorrect, click *Do Not Process*. Choosing this option will re-open the card and it will need to be re-certified. If you choose this option you will be able to send an email directly to all certifiers advising them that the card has been re-opened and why this action was taken (Figure 6).

\$ Value					
Activity/Project IDs [-]	Committed Effort	Payroll	Cost Share	Computed Effort	Certified Effort
<b>Sponsored</b>					
999999999 Hit Me with Your Best Shot					
3956BBY Wide Awake in Dreamland	0.00%	99.10%	0.00%	99.10%	98%
<i>Award Total:</i>	0.00%	99.10%	0.00%	99.10%	98%
<b>Sponsored Total:</b>	<b>0.00%</b>	<b>99.10%</b>	<b>0.00%</b>	<b>99.10%</b>	<b>98%</b>
<b>Non Sponsored</b>					
111111111 Funhouse	0.00%	0.90%	0.00%	0.90%	2%
<b>Non Sponsored Total:</b>	<b>0.00%</b>	<b>0.90%</b>	<b>0.00%</b>	<b>0.90%</b>	<b>2%</b>
<b>Grand Total:</b>	<b>0.00%</b>	<b>100.00%</b>	<b>0.00%</b>	<b>100.00%</b>	<b>100%</b>

Figure 5

Send Email close

Subject:

Message:

📎 📧 ↩ ➡
**B** *I* U
abc x<sub>2</sub> x<sup>2</sup>
📅 📁

☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰
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Styles Format Font Size A: A:

A Certification was reopened

Figure 6

## Manage Effort Notifications

From the Main Menu, effort coordinators may click on *Manage* to access any notifications regarding Payroll Adjustments.

Statements appearing in this section signify that a payroll transfer has been processed for the individual after the effort card was certified and that the *Computed Effort* and *Certified Effort* columns have now exceeded the 5% variance that FIU has set.

By selecting the magnifying glass in the Action column (*Figure 7*), a payroll transfer notification check list will appear. The checklist contains steps that need to be taken in order to resolve the task.

When each item has been completed, click the checkbox and click resolve. This will clear out the item from the notifications area.

### [+] Manage Effort Notifications Instructions ?

Payroll Transfer (1)

One item found.

Notification Detail	Status	Action
Payroll Adjustment Reconciliation Leia Organa-Solo - AA232187 routed for processing	Review	

One item found.

[Excel](#) | [XML](#) | [PDF](#) | [RTF](#)

✔
**Payroll Transfer Notification Check List**
[Close](#)

Please mark each of the steps below to resolve this cost transfer issue.

- Review Effort Card - Review Effort card for payroll transfer
- Process Payroll - Process Payroll Transfer in PantherSoft if needed

Save
Resolve

**Figure 7**

## The Effort Statement: Cost Share

The Effort Coordinator may need to add cost share data to an effort certification statement to reflect cost sharing for effort expended on a sponsored project that was cost shared by a non-sponsored id.

### Adding Cost Share to an Effort Card

From the Main Menu, click on *Manage* to 'Add Cost Sharing' (Figure 8)

#### **[<-] Add Cost Sharing**

The screenshot shows a web form for adding cost share. It is divided into two sections: 'To Account' and 'From Account'. The 'To Account' section includes fields for Employee (Solo Han - 1138327), To Account (9780307796387 - Rebel Dawn), Sponsor (00000012 - South Florida Water Management District), To Account Start Date (10/01/2012), and To Account End Date (09/30/2015). The 'From Account' section includes fields for From Account (111111111 - Funhouse), Sponsor (NA - NA), From Account Start Date (01/01/1900), and From Account End Date (12/31/2099). There are also fields for Cost Share % (200), Cost Share \$ (200), Budget Period (01/01/2015 - 05/18/2015), Type (Voluntary), and Justification (Voluntary). At the bottom, there are three buttons: 'Add Budget Period', 'Remove Budget Period', and 'Add Entry'. Red boxes with numbers 1 through 8 highlight the following elements: 1. Employee field; 2. To Account dropdown; 3. From Account dropdown; 4. Cost Share % and Cost Share \$ input fields; 5. Budget Period dropdown; 6. Type dropdown; 7. Justification input field; 8. Add Entry button.

**Figure 8**

1. In the employee box, begin to type in the last name or employee ID of the individual for whom you would like to enter cost share information. You may also enter the Panther ID. The system will attempt to match your search criteria. Once you see the appropriate name in the box, select the name to populate the employee box.
2. The 'to account' represents the project on which the effort was performed. This cannot be a non-sponsored id.
3. The 'from account' represents the source that funded the cost share for the project. This may only be a non-sponsored id.
4. Enter the Cost Share % or Cost Share dollar amount.
5. Select the Period of Performance for which the Cost Share should be applied from the Budget Period dropdown.
6. Select the type of Cost Share
7. Click on 'Add Entry'

You will have a chance to review the cost share entry before it posts to the individual’s effort card.

Once reviewed, you have three options (Figure 9):

1. Add Entry – This will complete the entry
2. Revise Entry – Select this option to revise any items after review
3. Cancel – This will cancel the entire entry

Figure 9

*\*Note cost share can only be applied to/reflected on "open" status effort statements. If a closed effort statement requires a cost share update, please contact [ecrt@fiu.edu](mailto:ecrt@fiu.edu).*

### The Effort Statement: Committed Effort

There are two ways to view commitment data within ecrt:

The first way to view commitment data is from within the effort card (Figure 10), under the column 'Committed Effort'

Kenobi, Obi-Wan - B573222 (9 Month Faculty)		Status: Not Certified, Not Processed, Re-Opened
INFO - This Effort Statement has been previously saved.		
Activity/Project IDs [ - ]		
<b>Sponsored</b>		
999999999	Hit Me with Your Best Shot	
3956BBY	Wide Awake in Dreamland	
<b>Sponsored Total:</b>		<b>Award Total: 43.00%</b>
		<b>43.00%</b>
<b>Non Sponsored</b>		
1111111111	Funhouse	0.00%
M11329	Corellia	0.00%
<b>Non Sponsored Total:</b>		<b>0.00%</b>
<b>Grand Total:</b>		<b>43.00%</b>

The second way to view commitment data is by running the commitment Listing Report (*Figure 11*) which is accessible from the effort card. The Commitment Listing Report is also available on the Reports page under the Commitments Category.

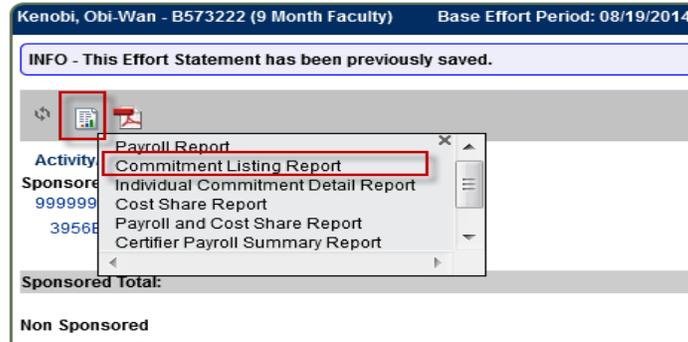


Figure 10

### The Effort Statement: Placing an Effort Card on Hold

Effort coordinators may place a statement on hold to reduce the amount of follow-up work that may be needed. Appropriate reasons are:

- No certification is required
- A manual statement is needed
- To make corrections or confirmation of data to be loaded to statement before certification

To place a card on hold (*Figure 11a and 11b*):

1. Select the 'On Hold' check box in the upper right hand portion of the effort card
2. When the 'On Hold Confirmation' box pops up, enter a reason for the hold. The reason for the hold is required to place a card on hold.
3. Click on the 'Confirm' button
4. Once confirmed the card will be placed 'on hold' until the check is removed from the 'on hold' box.

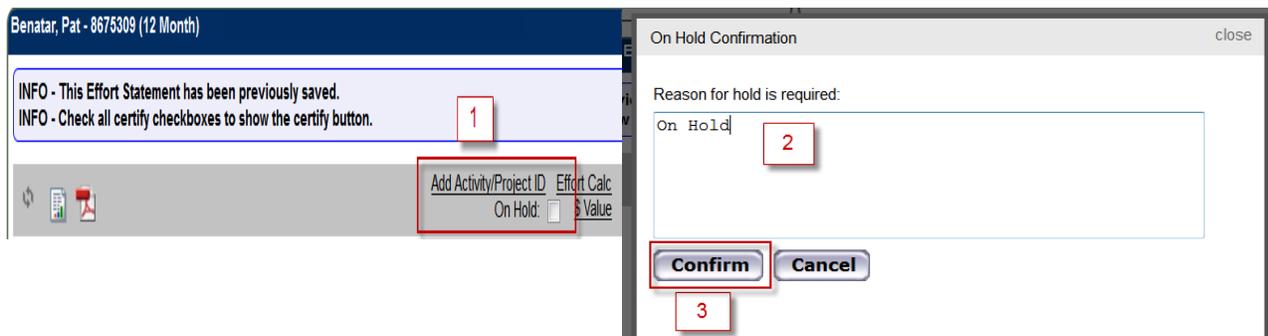


Figure 11a

Benatar, Pat - 8675309 (12 Month)

INFO - This Effort Statement has been previously saved.  
 INFO - Check all certify checkboxes to show the certify button.

4

On Hold Add Activity/Project ID Effort Calc  
 On Hold:  \$ Value

Figure 11b

### Notes & Attachments

Effort Coordinators can add notes and attachments for additional clarification and/or justification. Attachments must be in one of the following formats: PDF, GIF, TIF or JPEG (Figure 12).

Notes			
Date	User	Note	
06/09/2015	System User - 444-44-4444	Rebel Alliance	

Attachments		
Name	Date	
may-the-4th-be-with-you.pdf	06/09/2015 7:33 AM	

Figure 12

### Certifiers & Approvers

This section on the effort card lists the Effort Coordinator, Effort Coordinator Override if there is one, the PI of any project listed on the effort statement, and Certifier Proxy if there is one.

Certifiers & Approvers	
Type	Name
Certifier	Solo, Jaina - AA23187
Approver	Organa-Solo, Leia - BBY19165

Figure 13

### Related Reports

A few helpful reports are available directly from the effort statement. Click on the icon and select the report. The report results will appear on a new screen.

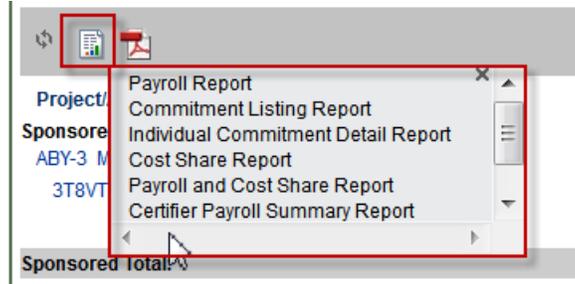


Figure 14

### Need Assistance?

Each department has a designated Effort Coordinator that you may contact. To find your designated effort coordinator, please go to <http://research.fiu.edu/effort/>.

Training materials are available via links in [ecrt](#).

In addition, you may seek additional assistance by contacting [ecrt@fiu.edu](mailto:ecrt@fiu.edu)