ECRT v. 4.5: Anatomy of a Statement for Principal Investigators

The purpose of this job aid is to provide PI's a visual summary of an effort statement in ECRT Version 4.5 and its new functionality. For more in depth instructions on how to certify an effort statement, please refer to the Effort Certification job aids and demos located on the ECRT Homepage's Useful Links section: ecrt-prd.eresearch.umn.edu/ecrt/.

A. Condensed Work List:
   - Select a researcher's statement
   - Change to a group view
   - Resort names from A-Z; or Z-A
   - Search by: researcher, DeptID, or project

B. Help:
   - Opens the generic ECRT help guide. Note: instructions are NOT U of M specific

C. Demographic:
   - Select a specific effort statement:
     - “Not Certified, Not Approved” (default view)
     - “In-progress”
     - Historical statements

D. Certification Data:
   - Review data for accuracy
   - If inaccurate, ability to change the Certified Effort column’s numbers
   - Select the Certify column's checkbox(es) to certify effort

E. Notes:
   - Enter/view auditable notes
   - Add/view auditable attachments
   - View statement's transactions and actions
   - View who took action on or viewed the statement
   - View statement's effort coordinator and potential certifiers
## Guide to Symbols in ECRT Version 4.5

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Description of the Symbol’s Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>▼</td>
<td>Indicates data is collapsed. Additional data, if applicable, is hidden from view.</td>
</tr>
<tr>
<td>▲</td>
<td>Indicates data was expanded. Additional data, if applicable, is no longer hidden from view.</td>
</tr>
<tr>
<td>★</td>
<td>Indicates additional data for this field or topic is available. The expand icon may need to be clicked to view it.</td>
</tr>
<tr>
<td></td>
<td>Page changes to a group view where multiple statements may be viewed and certified at the same time.</td>
</tr>
<tr>
<td></td>
<td>Sorts the associated researchers’ names in the work list alphabetically, or in reverse alphabetical order. The PIs name will always appear first.</td>
</tr>
<tr>
<td></td>
<td>Searches for statements by: researcher name, department, or account string. To initiate a search, click the filter icon and choose a filter type. Enter key words or numbers in the search box, and click the search icon.</td>
</tr>
<tr>
<td></td>
<td>Allows notes to be entered. All notes are auditable.</td>
</tr>
<tr>
<td></td>
<td>Uploads attachments (only jpeg, PDF, tif, or gif files may be used). All attachments are auditable.</td>
</tr>
</tbody>
</table>