

Reviewing the Total Professional Effort (TPE) Report

To access TPE Reports:

Note: The following reports have been created to monitor the activity in the annual reporting of TPE. It is essential that these reports be run so that all Faculty complete the effort reporting in a timely manner and allow Effort Coordinators time to make corrections to the effort and/or hours as needed.

The TPE Report is an alternate way to view the **TPE Statement** for Faculty. The report allows the Effort Coordinator to view the Faculty's **TPE Statement** without first reviewing the Faculty's standard **Effort Statement(s)**, or to review **TPE data for multiple Faculty in one report**.

The screenshot shows the ECRT Reporting interface. At the top, there is a navigation bar with tabs: Home, Certify, Manage, Reports, Administration, and Links. Below this, the 'Reports' page is displayed. On the left, under 'Category', there is a list: Certify, ESDUHS, Effort Statement Management, Payroll, and Total Professional Effort. A box labeled '1' points to the 'Reports' tab in the navigation bar. In the center, under 'Reports', there is a list: Faculty Missing TPE, Faculty With TPE - Effort Certification Not Required, and TPE Report. A box labeled '2' points to the 'Total Professional Effort' report in the 'Reports' list. On the right, there is a 'Description' column with a text box that reads: 'This report provides a list of faculty who have the TPE designation set in manage users, but have not yet entered TPE for the fiscal year requested.' Below the lists, there are 'Parameters' and 'Results' tabs. Under 'Parameters', there are input fields for 'Enter Department:' and 'Fiscal Year Start Date:' (with a date picker). There is also an 'Expand Search' link and a 'Run Report' button.

Note: As a reminder, the options listed are based on your security roles assigned in ECRT as an Effort Coordinator. Therefore, only the options available for the roles assigned will display. These options are not available to the Certifier.

1. To access reports, select the **Reports** page. On the **Reports** page, select **Total Professional Effort** in the Category Section.

Reviewing the TPE Report (cont.)

2. Available reports are listed in the **Reports** column. Descriptions of each report display in the **Description** column. Please review the descriptions for the following reports:

- Faculty Missing TPE*
- Faculty with TPE – Effort Certification not Required Clinical Activity Hours Validation Yearly*

Note: This report is helpful in managing TPE for Clinical Faculty who have effort on non-sponsored research. Effort Coordinators must pre-populate TPE no later than July 31 before the statement is auto-processed.

Note: TPE cannot be modified on a statement that has been auto-processed so Effort Coordinators must main the statement prior to the end of the pre-review period.

- TPE Report

Note: Detailed instructions are listed below for reports highlighted by the asterisk.

Note: The additional reports in the Total Professional Effort category are executed by entering Org Code in the Enter Department field and the start of the fiscal year of interest and the reports display as a list which includes employee and department information.

Reviewing the TPE Report (cont.)


In the resulting ECRT Reports page:

The screenshot displays the 'ecrt Reporting' page with a navigation bar at the top containing 'Home', 'Certify', 'Manage', 'Reports', 'Administration', and 'Links'. Below the navigation bar, the page is divided into three main sections: 'Category', 'Reports', and 'Description'. The 'Category' section lists 'Certifiers', 'ESOUHS', 'Effort Statement Management', 'Payroll', and 'Total Professional Effort'. The 'Reports' section lists 'Faculty Missing TPE', 'Faculty With TPE - Effort Certification Not Required', and 'TPE Report'. The 'Description' section contains the text: 'The TPE Report lists all users within the system and their current TPE distributions.' Below these sections, there are two tabs: 'Parameters' and 'Results'. The 'Parameters' tab is active, showing fields for 'Employee:', 'School / Department:', 'Date By:', 'Dates:', 'Start Date:', and 'End Date:'. The 'Run Report' button is located at the bottom of the 'Parameters' section.

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3. On the **Reports** page, choose the **TPE Report** from the **Total Professional Effort** Category.
4. Enter data to execute the report. Hovering over the  information icon provides details about the data required for each field.
5. After data is entered, select **Run Report**.

Reviewing the TPE Report (cont.)

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

7	Certifier	Department	Effective Start Date	Effective End Date	PDC	University	VA	Status
	GEER, CERTIFIER - 820001	9870000003 - DUKE UNIVERSITY ECRT SAMPLE ORG UNIT	07/01/2016		85.0 %	15.0 %	0.0 %	Planned
	GROSSMAN, CERTIFIER - 800003	9870000003 - DUKE UNIVERSITY ECRT SAMPLE ORG UNIT	07/01/2016	07/31/2016	11.0 %	89.0 %	0.0 %	Planned
8	GROSSMAN, CERTIFIER - 800003	9870000003 - DUKE UNIVERSITY ECRT SAMPLE ORG UNIT	08/01/2016	06/30/2017	80.0 %	20.0 %	0.0 %	Planned
	WADE, CERTIFIER - 820005	9870000003 - DUKE UNIVERSITY ECRT SAMPLE ORG UNIT	07/01/2016		85.0 %	15.0 %	0.0 %	Planned
	Excel XML PDF RTF							

6. **Review the results** that ECRT displays based on the criteria selected in the steps above.
7. **Select the column heading** to sort the results by that column if desired.
8. Select the **Certifier's name (highlighted in blue)** to view the Total Professional Effort statement for that person.
9. If desired, use the buttons at the bottom of the screen to export the data to **Excel**, **XML**, **PDF**, or **RTF** files.
10. To exit the report, select a different report from the top of the page, select a different ECRT page to visit, or **Sign Out**.