

OU Primary Effort Coordinator and Grant Manager Guide

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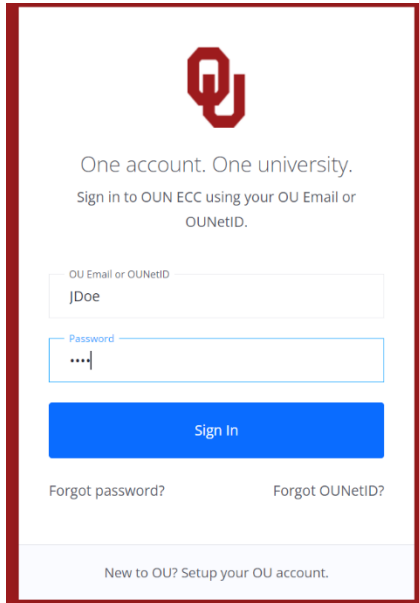
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Grant Manager (GM) – Person assigned to manage a specific project or projects.

Primary Effort Coordinator (PEC) – Person assigned to manage a specific department and all projects associated to that department. By default, the PEC is the grant manager for all projects.

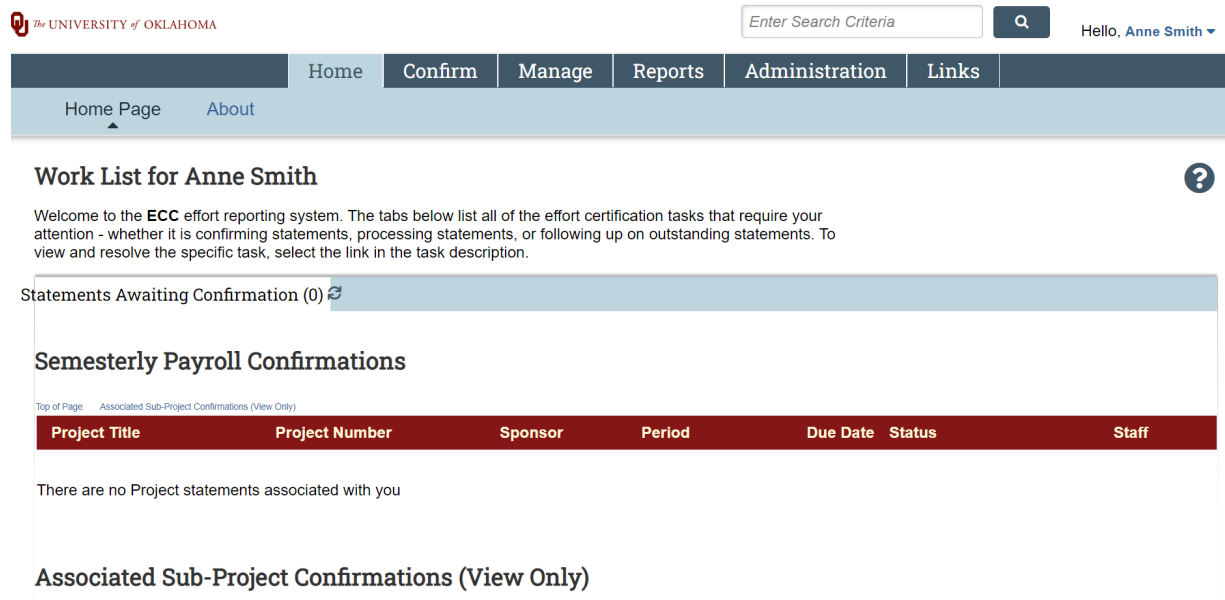
Logging into ECC

User Login: Users will input their OU credentials to login to ECC.



Home Page: Users will be routed to their Home Page after logging in.

Statements Awaiting Confirmation Tab –Users will see the Statements Awaiting Confirmation tab, but will need to navigate to the department dashboard to manage information related to a department.



Understanding the Department Dashboard

The department dashboard is for PEC's to review and manage the information related to a department including the employees, accounts, and awards associated to that department.

Under the Manage tab on the navigation bar, select Department Dashboard.



The PEC will only have access to their assigned department(s). Select a department from the drop down menu and select Choose.

Department Dashboard for EDUC TRNG EVAL ASSESS MEAS - OUT02760

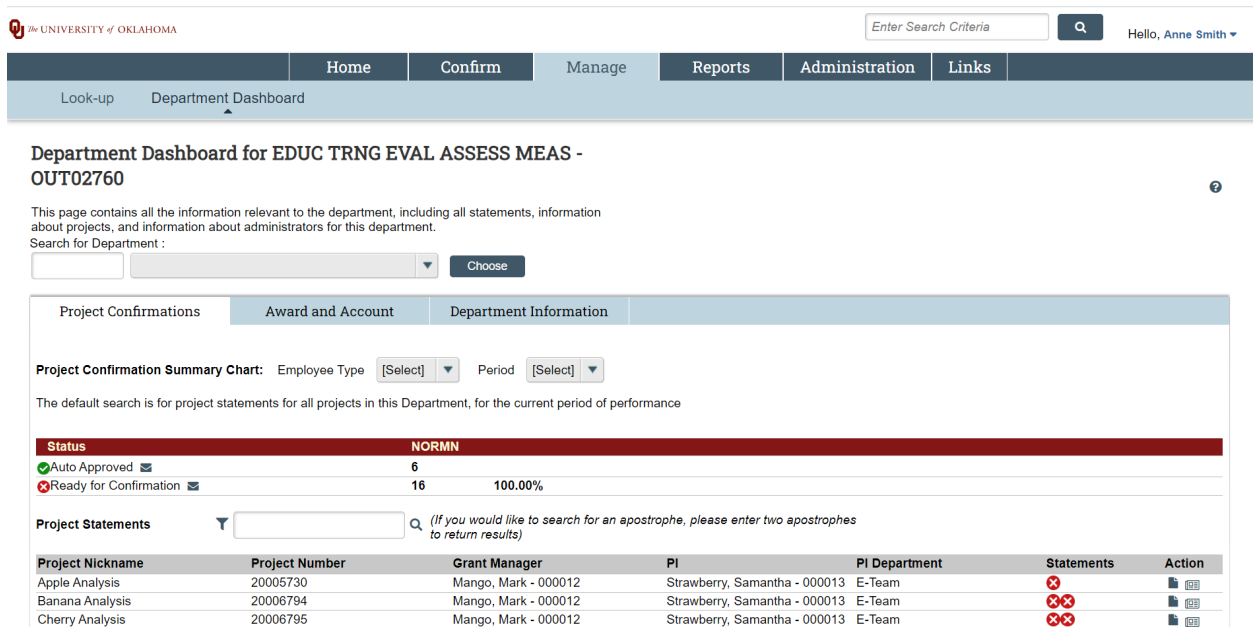
This page contains all the information relevant to the department, including all statements, information about projects, and information about administrators for this department.

Search for Department :

OUT02760- EDUC TRNG EVAL ASSESS MEAS

Filters

The Department Dashboard appears.



Department Dashboard for EDUC TRNG EVAL ASSESS MEAS - OUT02760

This page contains all the information relevant to the department, including all statements, information about projects, and information about administrators for this department.

Search for Department :

Project Confirmations | Award and Account | Department Information

Project Confirmation Summary Chart: Employee Type [Select] Period [Select]

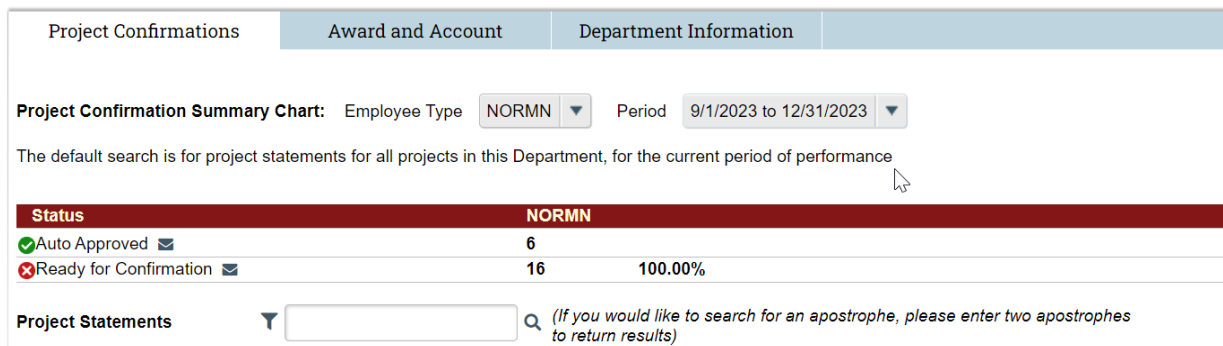
The default search is for project statements for all projects in this Department, for the current period of performance

Status	NORMN	
Auto Approved	6	
Ready for Confirmation	16	100.00%

Project Statements (If you would like to search for an apostrophe, please enter two apostrophes to return results)

Project Nickname	Project Number	Grant Manager	PI	PI Department	Statements	Action
Apple Analysis	20005730	Mango, Mark - 000012	Strawberry, Samantha - 000013	E-Team	✗	
Banana Analysis	20006794	Mango, Mark - 000012	Strawberry, Samantha - 000013	E-Team	✗✗	
Cherry Analysis	20006795	Mango, Mark - 000012	Strawberry, Samantha - 000013	E-Team	✗✗	

The **Project Confirmations** tab includes the Project Confirmation Summary Chart and Project Statements sections.



Project Confirmations | Award and Account | Department Information

Project Confirmation Summary Chart: Employee Type NORMN Period 9/1/2023 to 12/31/2023

The default search is for project statements for all projects in this Department, for the current period of performance

Status	NORMN	
Auto Approved	6	
Ready for Confirmation	16	100.00%

Project Statements (If you would like to search for an apostrophe, please enter two apostrophes to return results)

[Project Confirmation Summary Chart](#) - When first accessing the page, the chart shows the statistics for all statement types and all employee types for the most recent Period of Performance. To see the statistics for a specific period, select the employee type in the drop-down and the Period of Performance from the drop-down list.

Note: Search for employee type NORMN

The chart shows only those statuses that apply to statements for that period.

Project Statements section – This section lists all project statements associated to the department.

Project Confirmation Summary Chart: Employee Type NORMN Period 6/1/2023 to 8/31/2023

The default search is for project statements for all projects in this Department, for the current period of performance

Status	NORMN	
Auto Approved	6	
Ready for Confirmation	16	84.21%
Confirmed	2	10.53%
Ready for Re-Confirmation	1	5.26%
On Hold	1	

Project Statements *(If you would like to search for an apostrophe, please enter two apostrophes to return results)*

Project Nickname	Project Number	Grant Manager	PI	PI Department	Statements	Action
Banana Analysis	20006794	Mango, Mark - 000012	Strawberry, Samantha - 000013	E-Team	⊗	
Cherry Analysis	20006795	Mango, Mark - 000012	Strawberry, Samantha - 000013	E-Team	⊗	

Under the Statements column, hover over the icons to view the project statements' PI, period of performance and current status.

Strawberry, Samantha - 000013
 Jun 1 2023 to Aug 31 2023

Ready for Confirmation

Status	NORMN	
Auto Approved	6	
Ready for Confirmation	16	100.00%

Project Statements *(If you would like to search for an apostrophe, please enter two apostrophes to return results)*

Project Nickname	Project Number	Grant Manager	PI	PI Department	Statements	Action
Apple Analysis	20005730	Mango, Mark - 000012	Strawberry, Samantha - 000013	E-Team	⊗	
Banana Analysis	20006794	Mango, Mark - 000012	Strawberry, Samantha - 000013	E-Team	⊗	
Cherry Analysis	20006795	Mango, Mark - 000012	Strawberry, Samantha - 000013	E-Team	⊗	

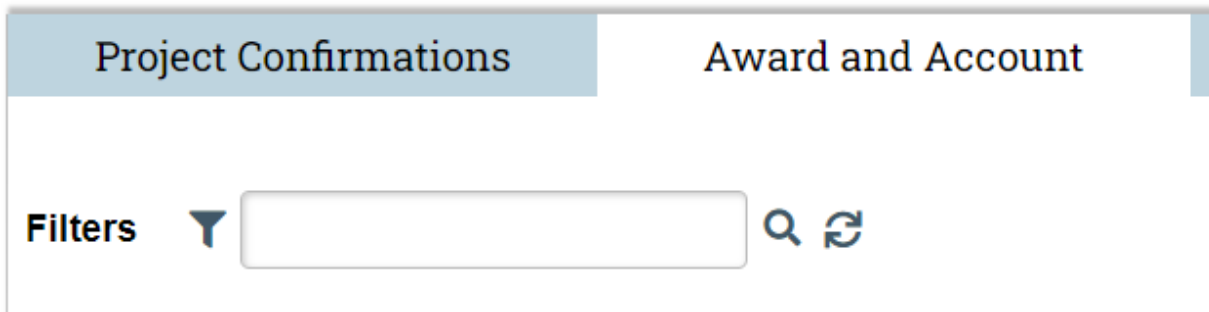
Strawberry, Samantha - 000013
 Jan 1 2023 to May 31 2023
 Ready for Confirmation

The Award and Account tab contains all awards and accounts assigned to the department, whether active or inactive, in a single list. All columns are sortable except the SPES column.

Project Confirmations		Award and Account		Department Information			
Filters <input type="text"/> <input type="button" value="Q"/> <input type="button" value="↻"/>							
Award Number	Account Number	Name ↓	Sponsor	PI	Start Date	End Date	SPES
22000041	20006885	▲ Analyzing Fruit Acidity	10008557 - Fruit Society	Ruby Raspberry	07/01/2022	08/31/2023	
22000041	20004026	▲ Analyzing Fruit Acidity	10008557 - Fruit Society	Ruby Raspberry	07/01/2021	06/30/2023	
22000790	20005730	▲ Apple Analysis	20000118 - Fruit Society	Samantha Strawberry	02/15/2022	05/31/2023	
23000020	20006794	▲ Banana Analysis	10002940 - Fruit Society	Samantha Strawberry	07/01/2022	06/30/2023	
23000021	20006795	▲ Cherry Analysis	10002940 - Fruit Society	Samantha Strawberry	07/01/2022	06/30/2023	

This icon indicates the project end date has passed and is now considered inactive

- The list can be filtered by name, number, sponsor, or PI. Click the filter icon and type the project name, number, PI or Grant Manager in the search field. Click the magnifying glass to search.



This page contains all the information relevant to the department, including all statements, information about projects, and information about administrators for this department.

Search for Department:

Select filter type:
 Name
 Number
 Sponsor
 PI

Filters

The page will display the results from the information entered into the filter field.

Project Confirmations		Award and Account		Department Information			
Filters <input type="text"/> <input type="button" value="Q"/> <input type="button" value="↻"/>							
Award Number	Account Number	Name	Sponsor	PI	Start Date	End Date	SPES
11595030					01/23/2006	01/01/2050	
22000041	20006885	▲ Analyzing Fruit Acidity	10008557 - Fruit Society	Ruby Raspberry	07/01/2022	08/31/2023	
22000041	20004026	▲ Analyzing Fruit Acidity	10008557 - Fruit Society	Ruby Raspberry	07/01/2021	06/30/2023	
22000790	20005730	▲ Apple Analysis	20000118 - Fruit Society	Samantha Strawberry	02/15/2022	05/31/2023	
23000020	20006794	▲ Banana Analysis	10002940 - Fruit Society	Samantha Strawberry	07/01/2022	06/30/2023	





The **Department Information** tab contains the information about the department's Effort Coordinators, department viewers, and the department tree.



Project Confirmations	Award and Account	Department Information		
Department Basic Information:				
Name:	EDUC TRNG EVAL ASSESS MEAS	Type:		
Description:	OUT02760 - EDUC TRNG EVAL ASSESS & MEAS	Code:		
Active:	Yes	OUT02760		
Department Effort Coordinator(s)				
Name	Address	Phone	Email	Action
Mango, Mark - 000012			mango@abc123.com	
Melon, Miles - 000018			melon@abc123.com	
Smith, Anne - 000009			smith@abc123.com	
Viewer(s)				
Name	Address	Phone	Email	Action
None found				
Reviewer(s)				
Name	Address	Phone	Email	Action
None found				
Department Relationships				
<ul style="list-style-type: none"> OUTREACH ADMINISTRATION (Melon Miles - 000018) CHILD WELFARE PROF ENHNCMNT PR (Melon Miles - 000018) CTR EARLY CHILDHOOD PROF DEV (Melon Miles - 000018) NATL RESOURCE CTR YOUTH SVCS (Melon Miles - 000018) CENTER FOR PUBLIC MANAGEMENT (Melon Miles - 000018) CTR DATA EXCHANGE ANALYSIS (Melon Miles - 000018) NATL CTR DISABILITY EDUC TRN (Melon Miles - 000018) MEDIEVAL FAIR (Melon Miles - 000018) SOUTHWEST PREVENTION CENTER (Melon Miles - 000018) SW PREVENTION CENTER-NATIONAL (Melon Miles - 000018) SW PREVENTION CENTER-REGIONAL (Melon Miles - 000018) EDUC TECH ASSISTANCE SVCS (Melon Miles - 000018) <li style="background-color: yellow;"> EDUC TRNG EVAL ASSESS MEAS (Smith Anne - 000009) 				

Note: The Primary Effort Coordinator is highlighted in yellow and cannot be edited

Statement Statuses

The project statement will update to different statuses throughout the Confirmation period.

 In Progress	This status indicates that a Project Statement is not yet ready for confirmation. This occurs during the Period of Performance, when payroll and profile data are being loaded and the Project Statements are building.
 Ready for Confirmation	This status indicates that the Project Statement is ready to be confirmed. Statements move to this status when the confirmation period begins and the statement requires an individual to confirm
 Auto Approved	This status is for project statements that are Auto Approved. The system automatically moves project statements that have no sponsored payroll or cost share associated to them into this status.
 Confirmed	This status indicates that an individual confirmed their Project Statement.

 Confirmed, Payroll Pending	This status indicates that an individual confirmed their Project Statement and a payroll transaction occurred after the fact. The payroll transaction creates a PAR task and the project statement remains in this status until an administrator completes the PAR task.
 Ready for Re-Confirmation	This is the status of a Project Statement that has been re-opened by an administrator. The PI will be able to Confirm their project statement again.

Navigating to the Project Statement

There are multiple ways to navigate to a project statement.

The **Look-up Page** is located under the Manage tab on the navigation bar. The PEC can use this page to search for departments and projects associated to them.

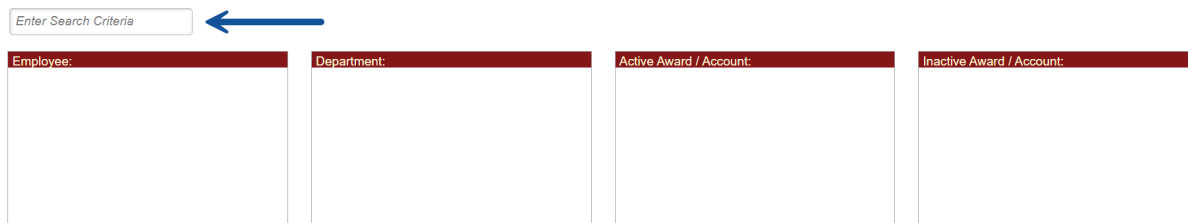
Enter a project number or name or department name in the Search box. In this example, we will look-up a project.



Look-up Page

The Look-Up page allows you to search for Employee, Award(s), Account(s), or Department(s). After at least three (3) characters of the name or number are entered the system displays the possible matches in three separate lists - one for Employee, one for Department, and one for Award and Account. You then can continue to enter data or select a match from the list and be taken to the appropriate page - the Effort statement page, the Department Dashboard, or the Award/Account Summary page. The Award/Account Summary page opens in new browser page. If you enter enough data to return only one result, you will be directed to the appropriate page automatically.

The Enter and Tab keys **do not** allow selection of data. If your institution is only utilizing Project Statement functionality, the 'Employee' column will not populate with any results.




The screenshot shows the search interface on the Look-up page. It features a search box with the placeholder 'Enter Search Criteria' and a blue arrow pointing to it. Below the search box are four columns for search results: 'Employee:', 'Department:', 'Active Award / Account:', and 'Inactive Award / Account:'. Each column is currently empty.

To narrow the suggestions the system generates, enter as much information as possible in the Search Box.

Clicking the result will result in the page refreshing, displaying the **Account Summary Page** for that project. The Award Summary and Account Summary page contains summary information about the project.

Account Summary

[Sponsored Project Employee Summary Report](#)

Account Name:	Analyzing Fruit Acidity	Associated Department(s):	EDUC TRNG EVAL ASSESS MEAS
Account Nickname:	Analyzing Fruit Acidity	Award Name:	Analyzing Fruit Acidity
Account Number:	20004026	Start to End Date:	07/01/2021 to 06/30/2023 
Account Type:	N	Account PI:	Ruby Raspberry - 000010 (Primary Effort Coordinator: Miles Melon - 000018)
Account Manager:	Anne Smith - 000009 (PEC)		


 [show more >>](#)

Below the page heading is the general information about the award including the award name, number, amount, sponsor name, sponsor number, the PI and the PI's Primary Effort Coordinator, the start and end dates, among other data.

Click the **Show More** hyperlink to display additional project information.

Account Summary

[Sponsored Project Employee Summary Report](#)

Account Name:	Analyzing Fruit Acidity	Associated Department(s):	EDUC TRNG EVAL ASSESS MEAS
Account Nickname:	Analyzing Fruit Acidity	Award Name:	Analyzing Fruit Acidity
Account Number:	20004026	Start to End Date:	07/01/2021 to 06/30/2023 
Account Type:	N	Account PI:	Ruby Raspberry - 000010 (Primary Effort Coordinator: Miles Melon - 000018)
Account Manager:	Anne Smith - 000009 (PEC)		
Account Sponsor Name:	Fruit Society (Other / Default Type)	Program:	Analyzing Fruit Acidity
Account Sponsor Number:	10008557	Sponsor Name:	Analyzing Fruit Acidity
Award Number:	22000041	Project Number:	20004026
Cost Sharing Requirement:	<input type="checkbox"/>	Exception Account:	<input type="checkbox"/>
K-Award:	<input type="checkbox"/>	Reportable Status:	<input type="checkbox"/>

[<< show less](#)

Below the project information are the **Project Statements**. Here, the PEC can view all current and historical statements related to the project.

Project Statements	Covered Individuals
Associated Project Statements	
Period	Project Confirmation Status
Spring 2023	Ready for Confirmation

Click on the period name or status name hyperlink in either the Period or Project Confirmation Status column to navigate to the project statement.

[+] Semesterly Payroll Confirmations Instructions

To confirm the statement, verify the accuracy of the payroll distribution for each employee. If the charges are accurate, check the corresponding checkboxes for each individual and click "Confirm". If a correction is necessary, please reach out to your department administrator/SBSC.

Work List

- Pepper, Phil - 000011
- Raspberry, Ruby - 000010
- ▼ Ready for Confirmation ★
- 20006885 Analyzing Fruit Acidity Summer 2023
- 20007905 Color-Changing Fruits Summer 2023
- 20007905 Color-Changing Fruits Fall 2023
- In Progress

20006885 - Analyzing Fruit Acidity

Project Information

Org: OUT02760 - EDUC TRNG EVAL ASSESS MEAS
 Project Title: Analyzing Fruit Acidity
 Sponsor Name: Analyzing Fruit Acidity
 Award Number: 22000041
 Project Funding Dates: 07/01/2022 to 08/31/2023

Project Statement for **20006885: Analyzing Fruit Acidity (Summer 2023)** ; Effort from 6/1/2023 to 8/31/2023; Status: Ready for Confirmation

Employee	Committed Effort	Total Payroll %	Payroll Dollars	Cost Share Dollars	Confirmed Total Payroll \$	Confirm?	Action
Cantaloupe, Claude - 000014	27%	24 %	\$2,581.57	\$800.00	\$3,381.57	<input type="checkbox"/>	
Celery, Cassie - 000019	0%	18 %	\$3,177.19	\$0.00	\$3,177.19	<input type="checkbox"/>	
Edamame, Ella - 000015	4%	5 %	\$331.13	\$200.00	\$531.13	<input type="checkbox"/>	
Kale, Kyle - 000016	0%	10 %	\$1,336.20	\$0.00	\$1,336.20	<input type="checkbox"/>	
Mandarin, Max - 000020	0%	35 %	\$4,459.08	\$0.00	\$4,459.08	<input type="checkbox"/>	
Mango, Mark - 000012	0%	8 %	\$1,564.00	\$0.00	\$1,564.00	<input type="checkbox"/>	

Another way to navigate to the project statement is through the **Project Confirmations** tab on the **Department Dashboard**.

Department Dashboard for EDUC TRNG EVAL ASSESS MEAS - OUT02760

This page contains all the information relevant to the department, including all statements, information about projects, and information about administrators for this department.

Search for Department :

Project Confirmations | Award and Account | Department Information

Project Confirmation Summary Chart: Employee Type Period

The default search is for project statements for all projects in this Department, for the current period of performance

Status			
✔ Auto Approved	6		
✘ Ready for Confirmation	16	100.00%	

Project Statements (If you would like to search for an apostrophe, please enter two apostrophes to return results)

Project Nickname	Project Number	Grant Manager	PI	PI Department	Statements	Action
Apple Analysis	20005730	Mango, Mark - 000012	Strawberry, Samantha - 000013	E-Team	✘	📄
Banana Analysis	20006794	Mango, Mark - 000012	Strawberry, Samantha - 000013	E-Team	✘✘	📄
Cherry Analysis	20006795	Mango, Mark - 000012	Strawberry, Samantha - 000013	E-Team	✘✘	📄

Click on any icon under the Status column to navigate to the project statement.

Note: Use the hover over feature to identify the period of the project statement.

The project statement generates in a new tab.

[+] Semesterly Payroll Confirmations Instructions

To confirm the statement, verify the accuracy of the payroll distribution for each employee. If the charges are accurate, check the corresponding checkboxes for each individual and click "Confirm". If a correction is necessary, please reach out to your department administrator/SBSC.

Work List

- Pepper, Phil - 000011
- Raspberry, Ruby - 000010
- ▼ Ready for Confirmation ★
- 20006885 Analyzing Fruit Acidity Summer 2023
- 20007905 Color-Changing Fruits Summer 2023
- 20007905 Color-Changing Fruits Fall 2023
- In Progress

20006885 - Analyzing Fruit Acidity

Project Information

Org: OUT02760 - EDUC TRNG EVAL ASSESS MEAS

Project Title: Analyzing Fruit Acidity

Sponsor Name: Analyzing Fruit Acidity

Award Number: 22000041

Project Funding Dates: 07/01/2022 to 08/31/2023

Project Statement for 20006885: Analyzing Fruit Acidity (Summer 2023) ; Effort from 6/1/2023 to 8/31/2023; Status: Ready for Confirmation							
Employee	Committed Effort	Total Payroll %	Payroll Dollars	Cost Share Dollars	Confirmed Total Payroll \$	Confirm?	Action
Cantaloupe, Claude - 000014	27%	24 %	\$2,581.57	\$800.00	\$3,381.57	<input type="checkbox"/>	📄
Celery, Cassie - 000019	0%	18 %	\$3,177.19	\$0.00	\$3,177.19	<input type="checkbox"/>	📄
Edamame, Ella - 000015	4%	5 %	\$331.13	\$200.00	\$531.13	<input type="checkbox"/>	📄
Kale, Kyle - 000016	0%	10 %	\$1,336.20	\$0.00	\$1,336.20	<input type="checkbox"/>	📄
Mandarin, Max - 000020	0%	35 %	\$4,459.08	\$0.00	\$4,459.08	<input type="checkbox"/>	📄
Mango, Mark - 000012	0%	8 %	\$1,564.00	\$0.00	\$1,564.00	<input type="checkbox"/>	📄

From the navigation menu, select **Confirm**, and then click **My Project Statements**.



The project PIs are listed in the Work List. Only the projects associated to the PEC's department will be listed.

[-] Semesterly Payroll Confirmations Instructions

To confirm the statement, verify the accuracy of the payroll distribution for each employee. If the charges are accurate, check the corresponding checkboxes for each individual and click "Confirm". If a correction is necessary, please reach out to your department administrator/SBSC.

Work List			20006885 - Analyzing Fruit Acidity	
Pepper, Phil - 000011			Project Information	
Raspberry, Ruby - 000010			Org:	OUT02760 - EDUC TRNG EVAL ASSESS MEAS
▼ Ready for Confirmation ★			Project Title:	Analyzing Fruit Acidity
20006885	Analyzing Fruit Acidity	Summer 2023	Sponsor Name:	Analyzing Fruit Acidity
20007905	Color-Changing Fruits	Summer 2023	Award Number:	22000041
20007905	Color-Changing Fruits	Fall 2023	Project Funding Dates:	07/01/2022 to 08/31/2023
In Progress				

Project Statement for 20006885: Analyzing Fruit Acidity (Summer 2023) ; Effort from 6/1/2023 to 8/31/2023; Status: Ready for Confirmation

Work List

Raspberry, Ruby - 000010

- ▶ Ready for Confirmation ★

20007905	Color-Changing Fruits	Summer 2023
20007905	Color-Changing Fruits	Fall 2023
- In Progress

▼ Strawberry, Samantha - 000013

- ▶ Ready for Confirmation ★

Use the > arrow key to expand and view the PI's project statements. The project statements will be grouped by status. Use the > arrow next to each status to view all of the PI's project statements that are in that status.

[+] Semesterly Payroll Confirmations Instructions

To confirm the statement, verify the accuracy of the payroll distribution for each employee. If the charges are accurate, check the corresponding checkboxes for each individual and click "Confirm". If a correction is necessary, please reach out to your department administrator/SBSC.

Work List

- ▶ Pepper, Phil - 000011
- ▶ Raspberry, Ruby - 000010
- ▼ Ready for Confirmation ★

Project Number	Project Title	Period
20006885	Analyzing Fruit Acidity	Summer 2023
20007905	Color-Changing Fruits	Summer 2023
20007905	Color-Changing Fruits	Fall 2023
- In Progress

20006885 - Analyzing Fruit Acidity

Project Information

Org:	OUT02760 - EDUC TRNG EVAL ASSESS MEAS
Project Title:	Analyzing Fruit Acidity
Sponsor Name:	Analyzing Fruit Acidity
Award Number:	22000041
Project Funding Dates:	07/01/2022 to 08/31/2023

Project Statement for 20006885: Analyzing Fruit Acidity (Summer 2023) ; Effort from 6/1/2023 to 8/31/2023; Status: Ready for Confirmation

Employee	Committed Effort	Total Payroll %	Payroll Dollars	Cost Share Dollars	Confirmed Total Payroll \$	Confirm?	Action
Cantaloupe, Claude - 000014	27%	24 %	\$2,581.57	\$800.00	\$3,381.57	<input type="checkbox"/>	\$
Celery, Cassie - 000019	0%	18 %	\$3,177.19	\$0.00	\$3,177.19	<input type="checkbox"/>	\$
Edamame, Ella - 000015	4%	5 %	\$331.13	\$200.00	\$531.13	<input type="checkbox"/>	\$
Kale, Kyle - 000016	0%	10 %	\$1,336.20	\$0.00	\$1,336.20	<input type="checkbox"/>	\$
Mandarin, Max - 000020	0%	35 %	\$4,459.08	\$0.00	\$4,459.08	<input type="checkbox"/>	\$
Mango, Mark - 000012	0%	8 %	\$1,564.00	\$0.00	\$1,564.00	<input type="checkbox"/>	\$


Click the project number, title or period to navigate to the project statement for the period listed next to the project title.

- Click the select all icon to view all project statements on one page.

Work List

- ▶ Pepper, Phil - 000011
- ▶ Raspberry, Ruby - 000010
- ▶ Strawberry, Samantha - 000013
- ▼ Ready for Confirmation ★


Project Number	Project Title	Period
20006795	Cherry Analysis	Summer 2023
- In Progress

Employee	Committed Effort	Total Payroll %	Payroll Dollars	Cost Share Dollars	Confirmed Total Payroll \$	Confirm?	Action
Cantaloupe, Claude - 000014	27%	24 %	\$2,581.57	\$800.00	\$3,381.57	<input type="checkbox"/>	\$ 
Celery, Cassie - 000019	0%	18 %	\$3,177.19	\$0.00	\$3,177.19	<input type="checkbox"/>	\$ 
Edamame, Ella - 000015	4%	5 %	\$331.13	\$200.00	\$531.13	<input type="checkbox"/>	\$ 
Kale, Kyle - 000016	0%	10 %	\$1,336.20	\$0.00	\$1,336.20	<input type="checkbox"/>	\$ 
Mandarin, Max - 000020	0%	35 %	\$4,459.08	\$0.00	\$4,459.08	<input type="checkbox"/>	\$ 
Mango, Mark - 000012	0%	8 %	\$1,564.00	\$0.00	\$1,564.00	<input type="checkbox"/>	\$ 
Radish, Ryan - 000021	0%	30 %	\$6,391.40	\$0.00	\$6,391.40	<input type="checkbox"/>	\$ 
Raspberry, Ruby - 000010	0%	0 %	\$197.42	\$0.00	\$197.42	<input type="checkbox"/>	\$ 
Sage, Sam - 000017	0%	0 %	\$61.13	\$0.00	\$61.13	<input type="checkbox"/>	\$ 
Strawberry, Samantha - 000013	0%	4 %	\$1,267.01	\$0.00	\$1,267.01	<input type="checkbox"/>	\$ 
Tamarind, Thea - 000022	0%	2 %	\$63.00	\$0.00	\$63.00	<input type="checkbox"/>	\$ 

Get Help Home

The columns displayed on the project statement include:

- ✓ The **Committed Effort** column shows the committed effort for the individual for the project statement period.
- ✓ The **Total Payroll %** column shows the percentage of the individual's payroll that was paid from the project
- ✓ The **Payroll Dollars** column lists the dollar amount the employee was paid from the project during the period.
- ✓ The **Cost Share Dollars** column lists the dollar amount the employee was paid from on the Cost Share fund code for the project.
- ✓ The **Confirmed Total Payroll \$** column = payroll dollars + cost share dollars
- ✓ The **Confirm?** column shows blank checkboxes that the PI will use during Confirmation.
- ✓ The **Action** column includes two payroll reports that the PEC/GM can use to review and validate payroll dollars and percentages for each employee.

 Run the payroll report for each employee by clicking the dollar sign icon under the action column. The report will generate in a new window.

Reporting

This page lists all reports that are available through the application.

Category	Reports	Description
Commitments	Payroll Report	specific individual, Department or Account and date range.
Management	SPES (Sponsored Project Employee Summary)...	The date range for this can be set one of two ways. First, the report can be run by selecting a date range. This allows the user to run a report that crosses reporting periods but is more relevant to the Account activity.
Monitoring		
Payroll/Cost Share		

Parameters

Results

- Pay Period View
- Account View

3 items found, displaying all items.

The report defaults on a Pay Period View showing the employee's payroll amount broken-down by pay period. The total payroll dollar and payroll percentage column are the amounts shown in the Total Payroll \$ and Confirmed Effort columns on the project statement.

This report can be exported into excel by clicking the excel hyperlink at the bottom of the page.

3 items found, displaying all items.

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

Click the **Account View** hyperlink to view all payroll for the employee for the period, broken-down by account.

Parameters

Results

- **Pay Period View**
- **Account View**

44 items found, displaying all items.












Employee ID	First Name	Middle Init.	Last Name	Department	Department Number	Grant	Pay Period	Payroll	Pay %	Pay Type	Employee Type	Statement Type
000013	Samantha		Strawberry	E-Team	CEPCTEAM	20006794 - Banana Analysis	06/01/2023 to 06/30/2023	\$1,527.56	5 %	PR-SPNSR-OUT02760-00013-00000-000000-00000	NORMN	Base
Subtotal								\$1,527.56	5 %			
						20006795 - Cherry Analysis	06/01/2023 to 06/30/2023	\$35.98	0 %	PR-SPNSR-OUT02760-00013-00000-000000-00000	NORMN	Base
Subtotal								\$35.98	0 %			

The report displays the name of the employee, the employee's primary department name and number, the account (shown as Grant), the pay period, the payroll amount, the percentage of the total statement payroll for the account, the pay type, and the employee type.

Click the X in the upper right corner to close the report.



View all payroll for an employee for the period by clicking the page icon under the action column. A pop up box will appear listing all of the projects the employee was paid from for the period. Each project is listed with the corresponding payroll dollar amount and percentage. The total percentage will equal 100%.

Employee	Committed Effort	Total Payroll %	Payroll Dollars	Cost Share Dollars	Confirmed Total Payroll \$	Confirm?	Action
Cantaloupe, Claude - 000014	27%	24 %	\$2,581.57	\$800.00	\$3,381.57	<input type="checkbox"/>	
Celery, Cassie - 000019	0%	18 %	\$3,177.7			<input type="checkbox"/>	
Edamame, Ella - 000015	4%	5 %	\$331.1			<input type="checkbox"/>	
Kale, Kyle - 000016	0%	10 %	\$1,336.2			<input type="checkbox"/>	
Mandarin, Max - 000020	0%	35 %	\$4,459.0			<input type="checkbox"/>	
Mango, Mark - 000012	0%	8 %	\$1,564.0			<input type="checkbox"/>	
Radish, Ryan - 000021	0%	30 %	\$6,391.4			<input type="checkbox"/>	
Raspberry, Ruby - 000010	0%	0 %	\$197.4			<input type="checkbox"/>	
Sage, Sam - 000017	0%	0 %	\$61.1			<input type="checkbox"/>	
Strawberry, Samantha - 000013	0%	4 %	\$1,267.0			<input type="checkbox"/>	
Tamarind, Thea - 000022	0%	2 %	\$63.0			<input type="checkbox"/>	

Project Payroll Summary - Summer 2023

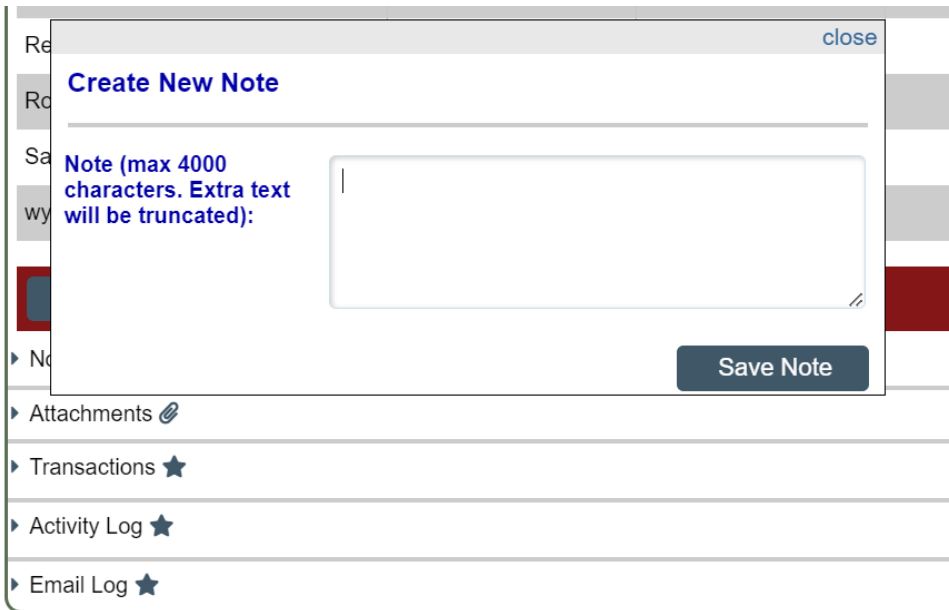
Claude Cantaloupe - 000014

Project Name	Confirmed Total Payroll \$	Certified Effort
20007229-Broccoli Taste T...	\$238.44	2%
20006885-Analyzing Fruit ...	\$3,381.57	24%
20007283-Broccoli Taste T...	\$706.04	5%
20006794-Banana Analysis	\$1,480.34	10%
20006795-Cherry Analysis	\$15.80	0%
20006796-Broccoli Taste T...	\$9.82	0%
20006797-Broccoli Taste T...	\$6.38	0%
20007014-Broccoli Taste T...	\$589.76	4%

close



Use the **Add Notes** feature to add a note to a project statement.



Select the document icon and a new pop-up window appears. Enter a note that will be attached to the project statement in the pop-up box.

Note that these comments appear on the statement at all times so anyone that can review the statement will see the comments.

To retain the information entered, select the **Save Note** button.

Date	User	Note	Action
04/24/2024	Anne Smith - 000009	Test	

Once the note is saved, it is viewable within the Notes list. A star icon appears next to the Notes label when a note is present. The date the note was added, the name and username of the person that added the note, and the note summary are visible.



Use the **Add Attachments** feature to add an attachment to a project statement.

Strawberry, Samantha - 000013	7%	0 %	\$35.98	\$0.00	\$35.98	<input type="checkbox"/>	\$
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Get Help
Home

- ▶ Notes ★ 🗑
- ▶ Attachments 📎
- ▶ Transactions ★
- ▶ Activity Log ★
- ▶ Email Log ★

Upload Project Attachment
close

Attach File

Select File to Attach:

Choose File
Attach File

Select the paper clip icon and a new pop-up window appears, allowing the PEC/GM to attach a file to the project statement.

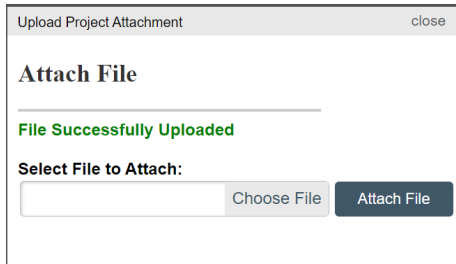
Upload Project Attachment
close

Attach File

Select File to Attach:

Choose File
Attach File

To locate the file, select the Browse button. When the correct file is selected, the file name will appear in the Select File to Attach field.



Select the Attach File button to upload the file to the project statement. Once the file is uploaded, a confirmation message appears.

The Attachments section of the project statement now displays the name of the file that was uploaded and the date it was uploaded.

Name	Date	Action
test.pdf	04/04/2024	


Any and all transactions that affect the project statement as well as all status changes are documented in the **Transactions Log**.










Click the > arrow icon to expand the transaction log. Note, the transactions are reflected in the Action column and the user whom the transaction effects, is reflected in the User column.



Date	User	Object Code	Action
03/26/2024 2:17 PM	System User - 444-44-4444	N/A	Changed from In Progress to Ready for Confirmation
03/25/2024 1:09 PM			Statement updated: payroll \$599.07
03/25/2024 1:09 PM			Statement updated: payroll \$29.52
03/25/2024 1:09 PM			Statement updated: payroll \$29.53
03/25/2024 1:09 PM			Statement updated: payroll \$1,432.83
03/25/2024 1:09 PM			Statement updated: payroll \$251.21
03/25/2024 1:09 PM			Statement updated: payroll \$232.84
03/25/2024 1:08 PM			Statement updated: payroll \$185.38
03/25/2024 1:08 PM			Statement updated: payroll \$152.32
03/25/2024 1:08 PM			Statement updated: payroll \$263.18
03/25/2024 1:08 PM			Statement updated: payroll \$23.65
03/25/2024 1:06 PM			Statement updated: payroll \$1,483.3
03/25/2024 1:06 PM			Statement updated: payroll \$2,235.76
03/25/2024 1:06 PM			Statement updated: payroll \$2,624.98
03/25/2024 1:06 PM			Statement updated: payroll \$2,068.08

The **Activity Log** tracks actions and activities that are not captured in the Transactions log including accessing and viewing the statement and assigning designees. Note, the activities are reflected in the Action column and the person who performed the activity is reflected in the User column.


Strawberry, Samantha - 000013 7% 0 % \$35.98 \$0.00 \$35.98 

[Get Help](#) [Home](#)

- Notes  
- Attachments 
- Transactions 
- **Activity Log ** 
- Email Log 

 Activity Log 

Date	User	Action
04/24/2024 12:59 PM	Anne Smith - 000009	The project statement was viewed.
04/24/2024 12:49 PM	Anne Smith - 000009	The project statement was viewed.
04/24/2024 12:43 PM	Anne Smith - 000009	The project statement was viewed.
04/24/2024 12:41 PM	Anne Smith - 000009	The project statement was viewed.
04/24/2024 11:41 AM	Anne Smith - 000009	The project statement was viewed.
04/24/2024 11:37 AM	Anne Smith - 000009	The project statement was viewed.
04/24/2024 11:35 AM	Anne Smith - 000009	The project statement was viewed.
04/24/2024 11:33 AM	Anne Smith - 000009	The project statement was viewed.
04/24/2024 11:29 AM	Anne Smith - 000009	The project statement was viewed.
04/24/2024 11:19 AM	Anne Smith - 000009	The project statement was viewed.
04/24/2024 11:18 AM	Anne Smith - 000009	The project statement was viewed.
04/18/2024 1:58 PM	System User - 444-44-4444	The project statement was opened for certification.
03/26/2024 2:17 PM	System User - 444-44-4444	The project statement was opened for certification.

▸ Email Log 


The **Email Log** captures all emails relevant to the specific project statement. The type of email sent is reflected in the Action column. The log records the following emails:

- All notification emails and all reminder emails specific to the statement
- Emails triggered from the statement to the statement owner
- Group emails based on the status of the statement, regardless of where the message was initiated
- Emails about the statement being returned to the Certifier or reopened.



Strawberry, Samantha - 000013 7% 0 % \$35.98 \$0.00 \$35.98 

[Get Help](#) [Home](#)

- ▶ Notes  
- ▶ Attachments 
- ▶ Transactions 
- ▶ Activity Log 
- ▶ Email Log  

▼ Email Log 		
Date	User	Action
04/24/2024 3:07 PM	System User - 444-44-4444	The project statement reopen email was sent to
03/28/2024 4:29 PM	System User - 444-44-4444	The certification period opening notification email was sent to

Understanding the Confirmation Process

When the Confirmation period begins, the PI will receive a system generated email notifying them that their project statements are **Ready for Confirmation**.

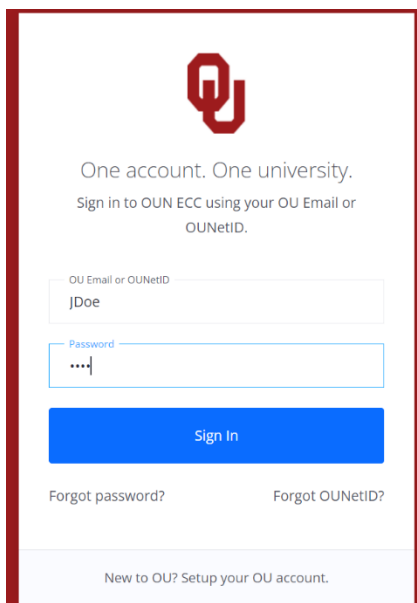
From: refsecc@ou.edu <refsecc@ou.edu>
Sent: April 24, 2024 11:19 AM
To: RefS Effort Reporting <refsecc@ou.edu>
Subject: Labor Confirmation Period Start Summary

The labor confirmation period has started for the Spring 2024 Semester. Please proceed to ECC to begin the confirmation process. If the statement is correct, please check the "Confirm?" Column and hit Agree. If you believe the statement is incorrect, please select the Get Help button to contact your Grant Manager with the necessary corrections. Do not confirm the statement if you know it is incorrect. The confirmation period will close 07/24/24. This is the website link:

<https://ouhsc.huronecrt.com/ouhsc/> The PI training video is located here:
https://financialservices.ouhsc.edu/Portals/1354/assets/grants%20and%20contracts/OUHSC_Certifier_Video_Final.mp4?ver=2019-12-13-142559-123
[Making Broccoli Apple-Flavored - Fall 2023](#)
[Application of Fruits in a Stochastic Model - Fall 2023](#)

To:
cc:

The PI will click the hyperlink next to the project name. The ECC login page appears. The PI will login by using their OU credentials.



After logging in, the Work List will appear. Under the Statements Awaiting Confirmation tab and the Semesterly Time and Effort Confirmations header, all project statements that are **Ready for Confirmation** will appear.

If the PI clicked directly on the project hyperlink from the email, the PI will be routed directly to the project statement after logging in.

Home
Confirm
Manage
Reports
Administration
Links

Home Page
About

Work List for Jane Doe ?

Welcome to the **ECC** effort reporting system. The tabs below list all of the effort certification tasks that require your attention - whether it is confirming statements, processing statements, or following up on outstanding statements. To view and resolve the specific task, select the link in the task description.

Statements Awaiting Confirmation (5)

Semesterly Payroll Confirmations

Top of Page Associated Sub-Project Confirmations (View Only)

Project Title	Project Number	Sponsor	Period	Due Date	Status	Staff
Application of Fruits in a Stochasti...	20008208	United States Ge...	Fall 2023	4/23/2024	✘ Ready for Confirmation	●
Making Broccoli Apple-Flavored	10560260	American Chemic...	Summer 2022	2/29/2024	✘ Ready for Confirmation	●
Making Broccoli Apple-Flavored	10560260	American Chemic...	Fall 2022	2/29/2024	✘ Ready for Confirmation	●

● The PI can click on the red icon in the Staff column to view all staff that will appear on that project statement.

Semesterly Payroll Confirmations

Top of Page Associated Sub-Project Confirmations (View Only)

Project Title	Project Number	Sponsor	Period	Due Date	Status	Staff
Application of Fruits in a Stochasti...20008208	<div style="border: 1px solid #ccc; padding: 5px;"> Staff for Making Broccoli Apple-Flavored - Fall 2023 close Employee Alexis Apple - 000002 Bob Banana - 000003 Brenda Blueberry - 000007 Caleb Cranberry - 000004 Daisy Dragon-Fruit - 000005 Sam Strawberry - 000008 </div>				Confirmation	●
Making Broccoli Apple-Flavored	10560260				Confirmation	●
Making Broccoli Apple-Flavored	10560260				Confirmation	●
Making Broccoli Apple-Flavored	10560260				Confirmation	●
Making Broccoli Apple-Flavored	10559660				Confirmation	●

The PI can click any hyperlink to navigate to the project statement.

Work List

Raspberry, Ruby - 000010

▼ Ready for Confirmation ★

20006885	Analyzing Fruit Acidity	Summer 2023
20007905	Color-Changing Fruits	Summer 2023
20007905	Color-Changing Fruits	Fall 2023

In Progress

20006885 - Analyzing Fruit Acidity

Project Information

Org: OUT02760 - EDUC TRNG EVAL ASSESS ME...

Project Title: Analyzing Fruit Acidity

Sponsor Name: Analyzing Fruit Acidity

Award Number: 22000041

Project Funding Dates: 07/01/2022 to 08/31/2023

Project Statement for 20006885: Analyzing Fruit Acidity (Summer 2023) ; Effort from 6/1/2023 to 8/31/2023, Status: Ready for Confirmation

INFO - Check all certify checkboxes to show the certify button.

Employee	Committed Effort	Total Payroll %	Payroll Dollars	Cost Share Dollars	Confirmed Total Payroll \$	Confirm? ★	Action
Cantaloupe, Claude - 000014	27%	24 %	\$2,581.57	\$800.00	\$3,381.57	<input type="checkbox"/>	
Celery, Cassie - 000019	0%	18 %	\$3,177.19	\$0.00	\$3,177.19	<input type="checkbox"/>	
Edamame, Ella - 000015	4%	5 %	\$331.13	\$200.00	\$531.13	<input type="checkbox"/>	
Kale, Kyle - 000016	0%	10 %	\$1,336.20	\$0.00	\$1,336.20	<input type="checkbox"/>	

- The PI can click the Select All icon located on the top left work list pane to view all project statements on one screen. Although all project statements will appear on the page, each statement will need to be confirmed individually.

During the Confirmation process, the PI should review all project information and payroll dollars and percentages for each employee on their project statement.

- The PI can run the Payroll Report as well as view the total payroll for an individual on their project statement.

After reviewing the project statement, **if changes are needed**, the PEC/GM must make the changes in PeopleSoft **prior** to the PI Confirming the project statement. A cost transfer must be submitted in PeopleSoft to make the necessary effort correction(s). Once the cost transfer has posted to the GL in PeopleSoft, the new payroll transactions will load to the project statement overnight. At this time the project statement can be reviewed to ensure the payroll is now correct and the Confirmation process can be completed. The PI should not Confirm a project statement if the data is not correct.

Get Help

The PI will be able to use the **Get Help** button to send emails to whoever is assigned to that project. A new email window will generate, prepopulated with a support email address.

Tamarind, Thea - 000022	0%	2 %	\$63.00	\$0.00	\$63.00	<input type="checkbox"/>	\$
-------------------------	----	-----	---------	--------	---------	--------------------------	----

Get Help ← Home

After reviewing the project statement, if **no changes** are needed, the PI can **Confirm** the project statement. They must select **all** of the checkboxes under the Confirm? column by selecting the icon underneath the word Confirm, or individually selecting each box.

Project Statement for 10559660: Making Broccoli Apple-Flavored (Fall 2023) ; Effort from 9/1/2023 to 12/31/2023; Status: Ready for Confirmation

Employee	Committed Effort	Total Payroll %	Payroll Dollars	Cost Share Dollars	Confirmed Total Payroll \$	Confirm?	Action
Tamarind, Thea - 000022	0%	2 %	\$63.00	\$0.00	\$63.00	<input type="checkbox"/>	\$

After checking all of the checkboxes, the **Confirm** button appears. The PI will click this button and the Attestation statement will appear.

Employee	Committed Effort	Total Payroll %	Payroll Dollars	Cost Share Dollars	Confirmed Total Payroll \$	Confirm?	Action
Cantaloupe, Claude - 000014	27%	24 %	\$2,581.57	\$800.00	\$3,381.57	<input checked="" type="checkbox"/>	\$
Celery, Cassie - 000019	0%	18 %	\$3,177.19	\$0.00	\$3,177.19	<input checked="" type="checkbox"/>	\$
Edamame, Ella - 000015	4%	5 %	\$331.13	\$200.00	\$531.13	<input checked="" type="checkbox"/>	\$
Kale, Kyle - 000016	0%	10 %	\$1,336.20	\$0.00	\$1,336.20	<input checked="" type="checkbox"/>	\$
Mandarin, Max - 000020	0%	35 %	\$4,459.08	\$0.00	\$4,459.08	<input checked="" type="checkbox"/>	\$
Mango, Mark - 000012	0%	8 %	\$1,564.00	\$0.00	\$1,564.00	<input checked="" type="checkbox"/>	\$
Radish, Ryan - 000021	0%	30 %	\$6,391.40	\$0.00	\$6,391.40	<input checked="" type="checkbox"/>	\$
Raspberry, Ruby - 000010	0%	0 %	\$197.42	\$0.00	\$197.42	<input checked="" type="checkbox"/>	\$
Sage, Sam - 000017	0%	0 %	\$61.13	\$0.00	\$61.13	<input checked="" type="checkbox"/>	\$
Strawberry, Samantha - 000013	0%	4 %	\$1,267.01	\$0.00	\$1,267.01	<input checked="" type="checkbox"/>	\$
Tamarind, Thea - 000022	0%	2 %	\$63.00	\$0.00	\$63.00	<input checked="" type="checkbox"/>	\$

Get Help → **Confirm** Home

Attestation

Account Title: Making Broccoli Apple-Flavored
Account Name: 10559660 - Testing Acidity of North American Fruits
Period: Fall 2023
Certifier: Doe, Jane - 000001
Personnel Being

As Principal Investigator of the project cited above, I do hereby confirm that the payroll costs contained in this report represent an accurate, allowable, reasonable, and allocable cost benefit to the stated objectives of the identified project. I understand that it is my contractual and/or legal obligation to promptly notify my Grant Manager of any changes, adjustment, or corrections that need to be made to reflect the actual effort expended on this project for the designated time period.

The PI must click **I Agree** to complete the Confirmation. The screen refreshes to the next statement that needs to be confirmed.

The PI can return to his/her Home Page to Confirm any remaining project statements.
Note: The project statement will drop off the Work List after it is confirmed.

Reopening a Project Statement

If a payroll transaction occurs that affects a **confirmed** project statement, ReFS can then Post the payroll transaction to the Project Statement and reopen the statement for Re-Confirmation.

if the statement is reopened, the PI will receive an email from ECC noting the statement was reopened and is Ready for Re-Confirmation. The statement will appear on the PI's Work List when he/she logs in.

Project Confirmation Reports

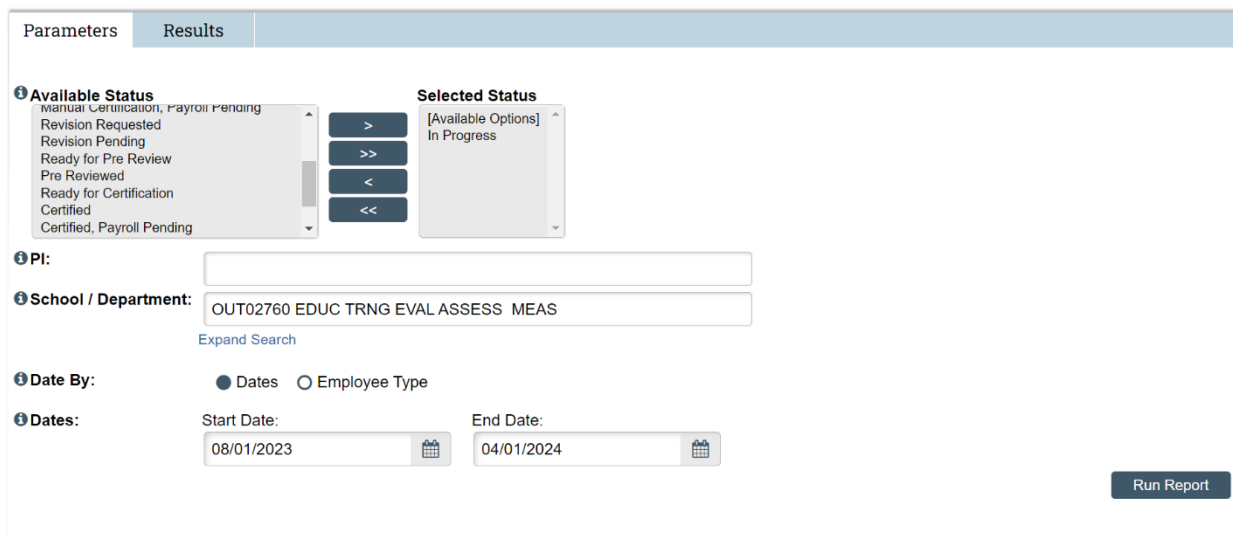
There are multiple reports the PEC/GM can use to report information about project statements.

Project Confirmation Status Summary Report

The Project Confirmation Status Summary Report is a useful tool to obtain a quick summary of the number of project statements in every status for each certifier or department for a period of performance.

Navigate to the 'Reports' Page > 'Reporting' > Select 'Management' from the Category header > Find 'Project Confirmation Status Summary Report' in the Reports header

Select any one of the statuses from the Available Status box and move it over individually by clicking the single right arrow, or select all of the statuses by clicking the double right arrow.



Search by the PI or the School/Department. Note: if the PI and School/department fields are left unpopulated, the summary report will display results for all PIs and Departments to which the user has access.

If using the Dates method (see above) to run the report, the user must enter a Start Date and End Date for which to run the report.

Search by Employee Type and Performance Period by selecting **NORMN** and a pre populated period from the drop down menu.

Click Run Report.

The Department Name is displayed, followed by the total number of project statements in each of the statuses listed in the columns.

Department Name	In Progress
EDUC TRNG EVAL ASSESS MEAS	1

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

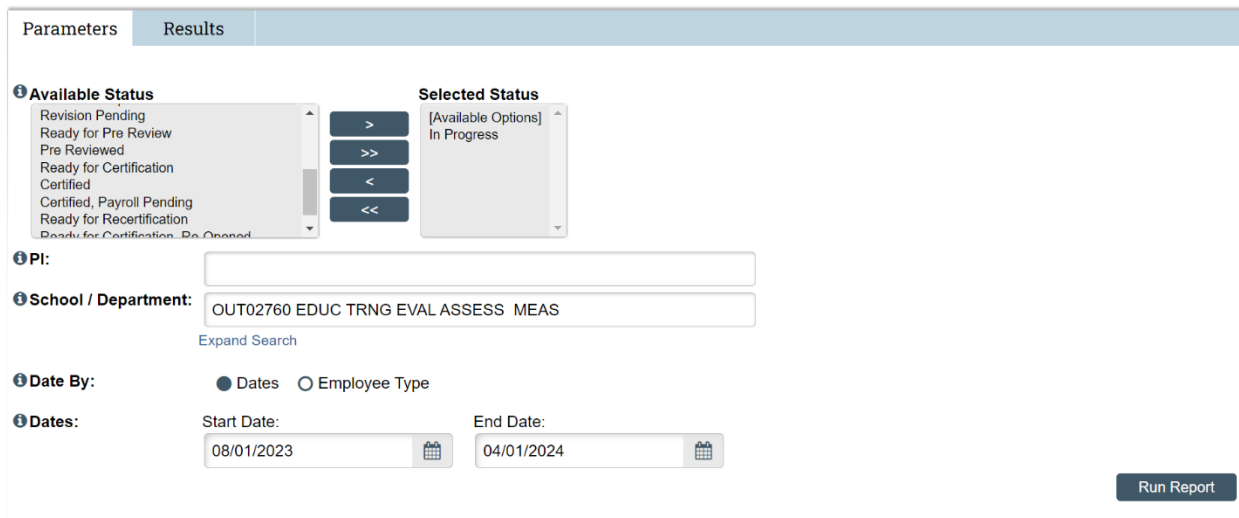
Note: The report can be exported into excel by clicking the excel hyperlink at the bottom of the report

Project Status Report

The Project Status Report is a useful tool to view a list of all project statements that have a specified status at the time the report is run.

Navigate to the 'Reports' Page > 'Reporting' > Select 'Management' from the Category header > Find 'Project Status Report' in the Reports header

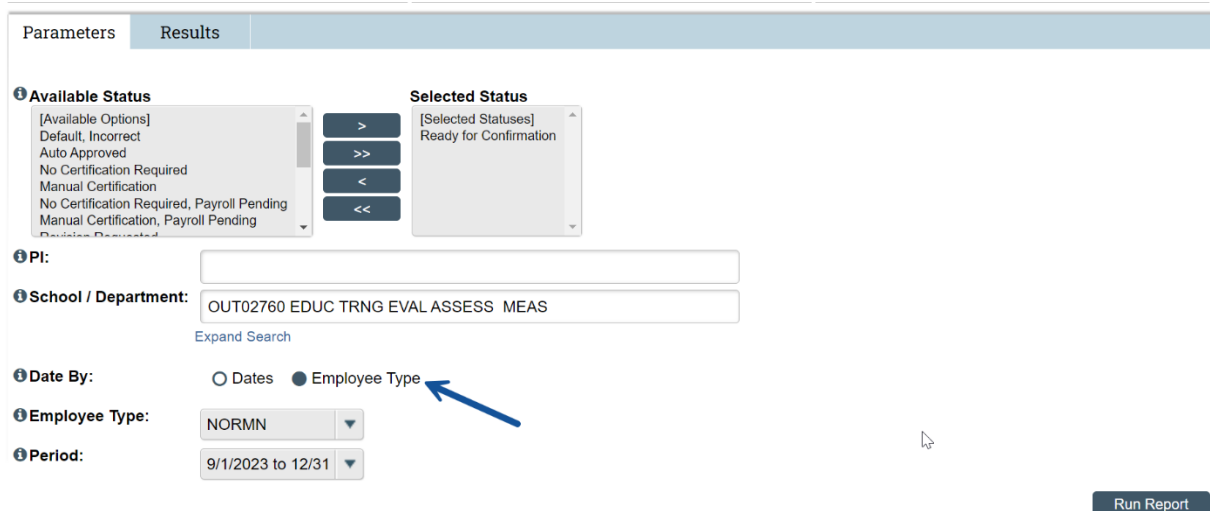
Select any one of the statuses from the Available Status box and move it over individually by clicking the single right arrow, or select all of the statuses by clicking the double right arrow.



Search by the PI or the School/Department. Note: if the PI and school/department fields are left unpopulated, the summary report will display results for all PIs and Departments to which the user has access.

If using the Dates method (see above) to run the report, the user must enter a Start Date and End Date for which to run the report.

Search by Employee Type and Performance Period by selecting **NORMN** and a pre populated period from the drop down menu.



The report generates a list of all individual project statements that match the parameters of the search. The results display the Project's Nickname, Project Number, Grant Department, Grant Manager, Grant Manager Email, PI Certifier, PI Certifier Email, PI Department, (Period) Nickname, and the Current Status of the project statement for the period. Sort the results by clicking on the column headers.

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.									
Project Nickname	Project Number	Grant Department	Grant Manager	Grant Manager Email	PI Certifier	PI Certifier Email	PI Department	Nickname	Current Status
Broccoli Taste Test	20007229	EDUC TRNG EVALASSESS MEAS	Mango, Mark - 000012	mango@abc123.com	Strawberry, Samantha - 000013	strawberry@abc123.com	E-Team	Fall 2023	Ready for Confirmation
Broccoli Taste Test	20007014	EDUC TRNG EVALASSESS MEAS	Mango, Mark - 000012	mango@abc123.com	Strawberry, Samantha - 000013	strawberry@abc123.com	E-Team	Fall 2023	Ready for Confirmation

Note: The report can be exported into excel by clicking the excel hyperlink at the bottom of the report

Payroll Report

The Payroll Report is a payroll summary report for a specific individual, department or account and date range.

Navigate to the 'Reports' Page > 'Reporting' > Select 'Payroll/Cost Share' from the Category header > Find 'Payroll Report' in the Reports header

Parameters		Results	
Employee:	<input type="text"/>		
School / Department:	<input type="text" value="OUT02760 EDUC TRNG EVALASSESS MEAS"/>		
	Expand Search		
Account:	<input type="text"/>	<input checked="" type="radio"/> Active	<input type="radio"/> Inactive
Search By Statement Type:	<input checked="" type="checkbox"/> Base <input type="checkbox"/> Non-IBS <input type="checkbox"/> Other		
Date By:	<input checked="" type="radio"/> Dates <input type="radio"/> Employee Type		
Dates:	Start Date: <input type="text" value="08/01/2023"/>	End Date: <input type="text" value="04/01/2024"/>	
			<input type="button" value="Run Report"/>

Enter the employee's name, department, or account number and define the date range for this report.

Parameters	Results
Employee:	<input type="text"/>
School / Department:	<input type="text" value="OUT02760 EDUC TRNG EVAL ASSESS MEAS"/> Expand Search
Account:	<input type="text"/> <input checked="" type="radio"/> Active <input type="radio"/> Inactive
Search By Statement Type:	<input checked="" type="checkbox"/> Base <input type="checkbox"/> Non-IBS <input type="checkbox"/> Other
Date By:	<input type="radio"/> Dates <input checked="" type="radio"/> Employee Type
Employee Type:	<input type="text" value="NORMN"/>
Period:	<input type="text" value="1/1/2024 to 5/31/"/>
<input type="button" value="Run Report"/>	

You can also search by Employee Type and Performance Period by selecting **NORMN** and a pre populated period from the drop down menu.

Note: The report can be exported into excel by clicking the excel hyperlink at the bottom of the report