

ECRT Upload Instructions

During the first week of the month, salary data needs to be pulled from Kuali for the previous month and sent to CSU's ECRT admin team.

1. Go to the General ledger entry look up in Kuali
 - a. In the account field type <99*
 - b. In the object code field, type 6777
 - c. Fiscal period should be set to the appropriate month
 - i. 1 = July
 - ii. 2= August
 - iii. Etc.
 - d. Click Search
2. Download data into a spreadsheet (there should be an export option at the bottom of the results page)
3. Sort data in excel by doc type
4. For all GECs, make sure you have a debit and a credit entry
5. Review all notes in the "Transaction Ledger Entry Description" column (should be column M) and identify the lines that aren't formatted as CSU ID Number and employee last name (ie. 829625161 COPPELLO)
 - a. Edit each line so that it reads in this format
 - b. If you need an employee's CSU ID number, pull up Kuali and do a "person" search. All employees CSU ID numbers should be listed.
6. Review all notes in the "Organization Reference Id" column (should be column S) so that it has the month and year listed (ie. 12.2020)
 - a. Add the date for any missing field
 - i. You may have to look up the document in Kuali to figure out which month the data belongs to
7. Once all data is in the same format, save the spreadsheet in excel format (.xls)
8. Open the WCNR Intranet and go to the account tab
9. Under reports, click on Kuali ECRT
10. Upload the excel file and read spreadsheet
 - a. If the file is not successful, the system will identify exactly which lines need editing. Go back to your excel file, make necessary edits, and re-upload.
 - b. If successful, you will be prompted to email the report to yourself and to the central ECRT admins
11. Once email is sent, you are done. The ECRT admin team will load this data into the ECRT system so that salary data is reflected in accordance with CSU's time and effort certification process.