Department Dashboard User Guide

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Overview:

The Department Dashboard is a useful section of ECC for any coordinator, but it will be a necessary tool for coordinators who are not assigned as the "Primary" for their department(s). This section of ECC displays a list of all effort/project statements under a selected cost center, as well as all the awards, grants, and other accounts (gifts, etc...) associated with the cost center. This is also the section where coordinator department assignments can be made and managed.

Navigating to the Department Dashboard:

Department Dashboard



3. Using the dropdown menu and select a Cost Center you are assigned. Then select the "Choose" button (if you have no available cost centers, you are not assigned to any as a coordinator – reach out to <u>effortreporting@uw.edu</u> or a colleague in your department that is has access to be added to the cost centers you will need). Job aid on managing departmental assignments located here: See job aid called "Managing ECC Coordinator"

Add Cost Sharing

Assignments & Authorizations"

Look-up

Department Dashboard

Search for Department :



Using the Department Dashboard to Access Statements:

- 1. To access an Effort Statement from the Department Dashboard, click on the "Effort Certifications" subtab.
 - a) Use the "Period" dropdown menu and select the period you want to view.
 - b) Identify an individual's effort statement that you want to view in the "Sponsored" section.
 - c) Select the icon in the "Statements" column in the same row to access that statement.

Effort Certifications	Project Certificat	ions Award and Ac	count Department Inform	nation		
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Certification Summary Cha	rt: Statement Type	Base Non-IBS E	mployee Type UW 🔻	Period 7/1/2023 1	o 12/31/2023 🔹 🔟	
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Covered Individuals	T	q (ii you would to return resu	like to search for an apostrophe,	please enter two ap	ostropries	
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Nam B - Sponsored 🚖 🕿 Certifier 1 Certifier 2	Alternate Effort Coordinator	Grant Manager	Employee ID	Role Certifier Certifier	Statements	Action Q Z Q Z
Nam B - Sponsored ★ ≤ Certifier 1 Certifier 2 Certifier 3	Alternate Effort Coordinator	Grant Manager	Employee ID EID XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Role Certifier Certifier	Statements	Action
Nam B - Sponsored * S Certifier 1 Certifier 2 Certifier 3 Certifier 4	Alternate Effort Coordinator	Grant Manager	Employee ID EID XXXXXXX Certifier 2 7/1/23 to 12/31/23	Role Certifier Certifier	Statements	Action ● Q 至 ● Q 至 ● Q 至
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Nam B - Sponsored ★ ⊠ Certifier 1 Certifier 3 Certifier 3 Certifier 5 Certifier 6 Certifier 7	Alternate Effort Coordinator	Grant Manager	Employee ID EID XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Role Certifier Certifier	Statements Covered Individuals table	Action

- To access a Project Statement from this page, click on the "Project Certifications" subtab.
 - a) Use the "Period" dropdown menu and select a period you want to view.
 - b) Identify a project statement that you want to view in the in the
 - c) Select the icon in the "Statements" column in the same row to access that statement.

Effort Certifications	Project Certifications	Award and Account	Department Information			
Project Certification Summ	ary Chart: Employee Type ect statements for all projects	UWP Period in this Department, for the cur	7/1/2023 - 9/30/2023 🔹			
Status.						
Status	U	WP				
 Ready for Pre Review 	1	WP				
Ready for Pre Review Project Statements	1	Q (If you would like to see to return results)	arch for an apostrophe, please e	nter two apostrophes		
Ready for Pre Review Project Statements Project Nickname	U 1 Project Number	Q (If you would like to see to return results) Grant Manager	arch for an apostrophe, please e	nter two apostrophes PI Department	Str Cents	Action

3. It is expected that certain cost centers could only have effort statements or only have project statements. All the data ECC has comes from Workday and it appears that effort statements are located under the cost center that is the home department for the certifier themselves, whereas the project statements are located under the cost center that the grant is within.

Award and Account section:

1. Click on the "Award and Account" tab to access a list of all the accounts (awards/grants, gifts, etc....) associated with the selected cost center.

Department I CC103323	Dashboard for	CAS Phys	ics - Academics -					0
This page contains a information about pro Search for Departme	all the information rele ojects, and informatio ent :	vant to the departi n about administra	nent, including all statements tors for this department.	s,				
Effort Certifica	tions Project	Certifications	Award and Account	Department Information				
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Award Number	Account Number	Name		Sponsor	PI	Start Date	End Date	SPES
	CC103323	CAS Phy	sics - Academics					
	GR025811	CAS Phy	sics Startura Im					
	GR025812	CAS Phy	sics Startup					
	GR025814	CAS I Phy	sics Startup					

The list shown in this section is derived from the data integrations ECC has with Workday. There is no needed action on this section.

Department Information Section:

- 1. Click on the "Department Information" tab to view individuals assigned as Effort Coordinators for the department.
- The yellow highlighting indicates who the "primary" coordinator is. As a coordinator, you can add and remove other coordinators to the department. You also can adjust who is the "primary" coordinator and configure more role setup for your cost centers. To learn more about managing roles and cost center assignments in ECC, refer to the job aid: <u>"Managing ECC Coordinator Assignments & Authorizations"</u>

Effort Certifications	Project Certifications	ount Department Information		
Department Basic Int Name: CAS Description: CAS	formation: Physics - Academics Physics - Academics-CC103323		Type: Cost C Code: CC103	enter 3323
Department Effort Co	oordinator(s)			
Name	Address	Phone	Email	Action
Coordinator 1			example@uw.edu	/ 200.2
Coordinator 2			example@uw.edu	1000
Coordinator 3			example@uw.edu	1000
Coordinator 4			example@uw.edu	1000
Coordinator 5			example@uw.edu	C Q 🛛
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Department Relation CAS Physics - Acade CAS Physics - A CAS Physics - CAS CAS Physics - CAS Physics - CAS CAS Physics - CAS P	ships mics (Financial CCH 09) (N/A) cademics (<i>Coordinator 5</i> - EID) ntinuum College Programs (N/A)			

3. The "Department Relationships" section indicates the cost center hierarchy ECC gets from Workday (note that not all cost centers will have statements within them in ECC so you will only need ECC access to those that have sponsored activity.