

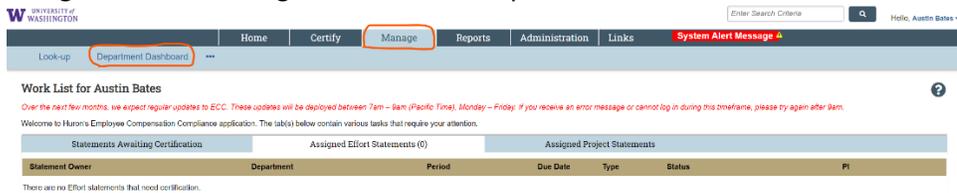
Job Aid: Managing ECC Coordinator Assignments

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Adding a new coordinator to a cost center:

- 1) Navigate to the “Manage” menu tab > “Department Dashboard” section.



- 2) Select whichever cost center you want to manage coordinators for from the drop-down menu and click the “Choose” button.

Department Dashboard

Search for Department :

- 3) Select the “Department Information” section of the page.

Department Dashboard for SOM | Rehabilitation Medicine Research - CC101567

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 :

Effort Certifications	Project Certifications	Award and Account	Department Information	
Department Basic Information:				
Name:	SOM Rehabilitation Medicine Research		Type: Cost Center	
Description:	SOM Rehabilitation Medicine Research-CC101567		Code: CC101567	
Active:	Yes			
Department Effort Coordinator(s)				
Name	Address	Phone	Email	Action
Bates, Austin - 815006892			adb91@uw.edu	
Parks, David - 819001325			parksd2@uw.edu	

- 4) Click the “Add” button below the coordinator list

Department Effort Coordinator(s)				
Name	Address	Phone	Email	Action
Bates, Austin - 815006892			adb91@uw.edu	
Parks, David - 819001325			parksd2@uw.edu	

- 5) Type in the last name ***space*** first name or EID of the person you want to add, then select them from the drop down, and click “Save” (you may get “no data” returned if trying to add someone who is not within the cost center that ECC associates with your profile)

Manage Assignments

Department: CC101567 - SOM | Rehabilitation Medicine Research

Select User:

Gardner, Matthew L - 851002149

- 6) They should be added to the list of coordinators for the cost center

Department Effort Coordinator(s)				
Name	Address	Phone	Email	Action
Bates, Austin - 815006892			adb91@uw.edu	
Gardner, Matthew L - 851002149			mgard4@uw.edu	
Parks, David - 819001325			parksd2@uw.edu	

- 7) For the added person to access the application, they must also have the “Coordinator” role. If they do not already have this role, ECC central admins will be notified automatically within 24 hours of them being added to the cost center, and will subsequently give them the needed role.

Removing a coordinator from a cost center:

- 1) Reach out to effortreporting@uw.edu with the name and EID of the coordinator who needs to be removed (keep in mind that coordinator assignments to specific cost centers are necessary for users with broad view level access to ECC, so you may see names you don’t recognize on the list)

Assigning/changing the primary coordinator of a cost center:

- 1) Go to the “Department Dashboard” > “Department Information” section (See steps 1-3 of “Adding a new coordinator to a cost center”)
- 2) Click the pencil icon on a given coordinator’s row to make them the “Primary” effort coordinator

Effort Certifications	Project Certifications	Award and Account	Department Information	
Department Basic Information:				
Name: SOM Rehabilitation Medicine Research		Type: Cost Center		
Description: SOM Rehabilitation Medicine Research-CC101567		Code: CC101567		
Active: Yes				
Department Effort Coordinator(s)				
Name	Address	Phone	Email	Action
Bates, Austin - 815006892			adb91@uw.edu	
Parks, David - 819001325			parksd2@uw.edu	

- 3) The yellow highlighted individual will change, indicating the primary coordinator has changed.

Effort Certifications	Project Certifications	Award and Account	Department Information	
Department Basic Information:				
Name:	SOM Rehabilitation Medicine Research		Type: Cost Center	
Description:	SOM Rehabilitation Medicine Research-CC101567		Code: CC101567	
Active:	Yes			
Department Effort Coordinator(s)				
Name	Address	Phone	Email	Action
Bates, Austin - 815006892			adb91@uw.edu	
Parks, David - 819001325			parksd2@uw.edu	

Managing PI/Certifier assignments:

Note: By default, the Primary coordinator for a given cost center is assigned to all the PIs in that cost center. This enables them to see those PIs' project statements on their home page when statements are "Ready for Pre Review". Coordinators not assigned as the primary will not see the project statements on their home page, unless they are given a "Grant Manager" assignment with certain PIs in ECC (this section shows how to add these assignments).

- 1) Go to the "Department Dashboard" > "Department Information" section (See steps 1-3 of "Adding a new coordinator to a cost center")
- 2) Click the notepad with a pencil () icon on the coordinator's row to manage their list of PIs they are assigned (you can do this for yourself)

Department Effort Coordinator(s)

Name	Address	Phone	Email	Action
Bates, Austin - 815006892			adb91@uw.edu	
Parks, David - 819001325			parksd2@uw.edu	

- 3) Select a PI from the left box list ("Unassigned PI/Certifier List"), and click the single arrow (pointed right >) to move them to the "Assigned PI/Certifier List" box to the right

Manage Grant Manager Assignments

Unassigned PI/Certifier List

[Associated certifiers]

- Agresta, Cristine - 854005332 (CC101564)
- Alschuler, Kevin N - 854008229 (CC101564)
- Antmann, Dagmar - 877000396 (CC101564)
- Balkman, Geoffrey S - 845008750 (CC101564)
- Baylor, Carolyn - 876006672 (CC101564)
- Bentley, Jacob A - 859009097 (CC104297)

[Covered Individuals to be assigned]

[>] [>>] [<] [<<]

Save

- 4) Move as many PIs as necessary to the "Assigned" section, then click "Save"

Manage Grant Manager Assignments

Unassigned PI/Certifier List

[Associated certifiers]

- Alschuler, Kevin N - 854008229 (CC101564)
- Antmann, Dagmar - 877000396 (CC101564)
- Balkman, Geoffrey S - 845008750 (CC101564)
- Baylor, Carolyn - 876006672 (CC101564)
- Bentley, Jacob A - 859009097 (CC104297)
- Bombardier, Chuck - 871002202 (CC104297)

[Covered Individuals to be assigned]

- Agresta, Cristine - 854005332 (CC101564)

[>] [>>] [<] [<<]

Save

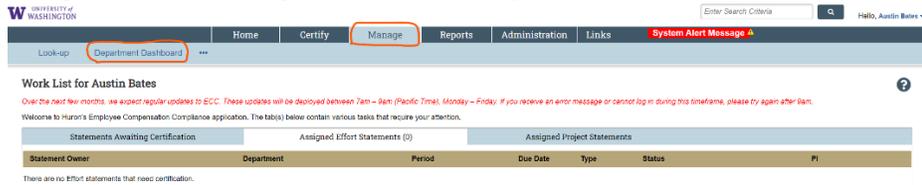
- 5) This will make the selected coordinator, the ECC "Grant Manager" for all the selected PIs' projects in ECC. This assignment will override the "primary" coordinator assignment of the cost center for these PIs. This means the coordinator given these assignments will now get automated system emails about statements being "Ready for Pre Review", and will see their assigned PI(s) statements on their home page.
- 6) The PI/certifier assignments span across cost centers, so if a particular PI has projects under multiple different departments, where the coordinator for those accounts should be different,

use the “Grant Manager Override” functionality instead of the PI assignments (see next section of this job aid) to assign coordinators to specific grant work-tags.

Assigning a “Grant Manager Override” to an individual grant work tag:

Note: Individual must be associated to the cost center as a coordinator on the “Department Information” section (see “Adding a new coordinator to a cost center”)

- 1) Navigate to the “Manage” menu tab > “Department Dashboard” section.



- 2) Select whichever cost center you want to manage coordinators for from the drop-down menu and click the “Choose” button.

Department Dashboard

Search for Department :

- 3) Select the “Project Certifications” section

Department Dashboard for SOM |
Rehabilitation Medicine Research -
CC101567

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 :

Effort Certifications	Project Certifications	Award and Account	Department Information
<p>Project Certification Summary Chart: Employee Type <input type="button" value="UWP"/> Period <input type="button" value="7/1/2023 to 9/30/2023"/></p> <p>The default search is for project statements for all projects in this Department, for the current period of performance</p>			

- 4) Click the plus icon on the same row of the grant you want to assign a “Grant Manager Override” to

Project Nickname	Project Number	Grant Manager	PI	PI De
	CC101567	Parks, David - 819001325	N/A	N/A
	GF116	Parks, David - 819001325	N/A	N/A
	GF119	Parks, David - 819001325	N/A	N/A
	GF120		N/A	N/A
	GF128		N/A	N/A
	GF132		N/A	N/A
Grant 1	GR00E	Parks, David - 819001325	Example PI 1	SOM Admi
Grant 2	GR00E	Parks, David - 819001325	Example PI 1	SOM

- 5) Enter the person’s name you want to add as the override, last name *space* first name, or EID, and select them from the results that appear below the search bar. Then click the save icon.

815006892 +

Enter Grant Manager Override: x +

bates a [Save]

Bates Austin - 815006892

819001325 +

Enter Grant Manager Override: x

Bates Austin - 815006892 [Save]

[Redacted]

- 6) The result is that an override is now added. They would now see the project statements for this grant on their home page and will receive emails when it has a statement that is ready for pre review.
- 7) To remove the override, click the red minus symbol (-)

Bates Austin -
815006892 + -