



Instruction Sheet for Managing Recipient Roles in EAGL

Process: Managing Organization Members and Their Roles

System Status: All

What is the Process? To manage roles/permissions at both the organization and document level.



Everyone in your organization who will be doing work in EAGL must be registered in both SAW and EAGL.

Within your document, you will see the Recipient Contacts form. This form is used to identify contacts for a specific agreement and are not the same as organization members. The Recipient Contacts form is not related to organization or document roles: The Authorized Signatory is a signatory on a specific agreement and is not to be confused with the Authorized Official for the organization or document. Only the Authorized Official can change role assignments at the organization or document level. Roles set at the organization level serve as the user's default role on newly initiated applications.



TIP: Additional details are available in the “Managing Roles and Permissions in EAGL” section of the EAGL User Manual.

To manage roles at the organization level:

- Choose “My Organization(s)” from the “My Home” page.



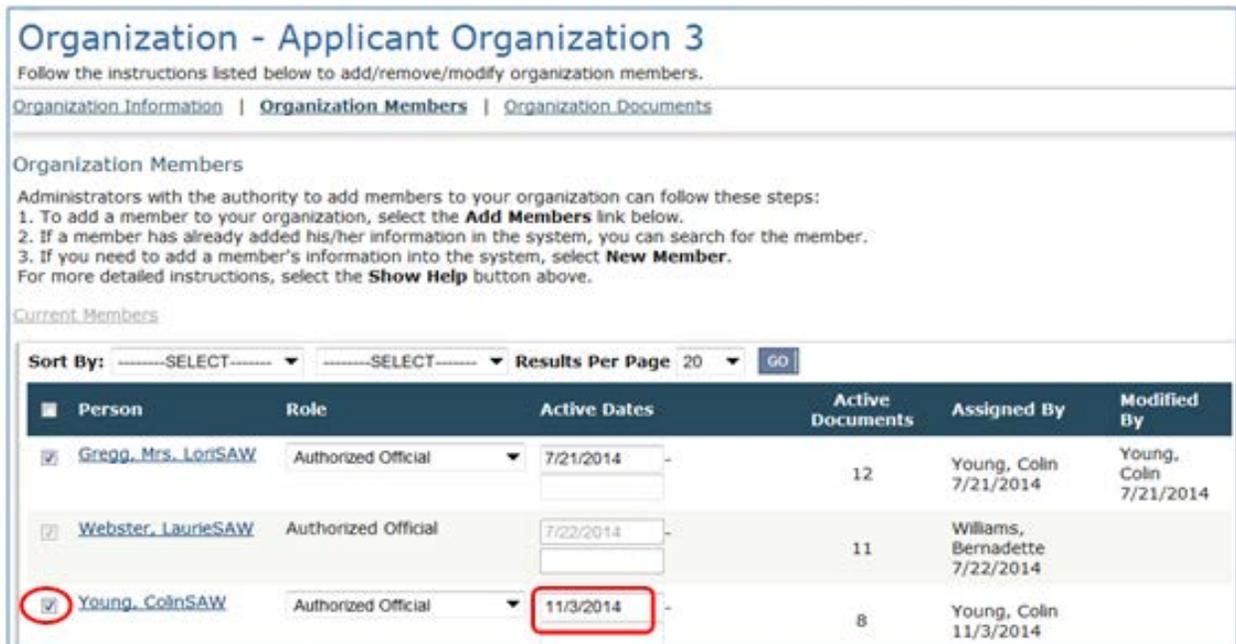
- Select “Organization Members” from the Organization Form.



All members should have a check next to their name. The Authorized Official may now perform several actions:

1. To change the role of a member: Select the correct role for the member from the dropdown menu and enter an active date.
2. To deactivate a member: Enter an end date in the box below the active date.

 **TIP: If you deselect the checkbox and select save, the person will be deleted from your organization and only Ecology can associate them with the organization again.**



Organization - Applicant Organization 3
Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#)

Organization Members

Administrators with the authority to add members to your organization can follow these steps:
1. To add a member to your organization, select the **Add Members** link below.
2. If a member has already added his/her information in the system, you can search for the member.
3. If you need to add a member's information into the system, select **New Member**.
For more detailed instructions, select the **Show Help** button above.

Current Members

Sort By: -----SELECT----- -----SELECT----- Results Per Page 20

Person	Role	Active Dates	Active Documents	Assigned By	Modified By
<input checked="" type="checkbox"/> Gregg, Mrs. LoriSAW	Authorized Official	7/21/2014 - <input type="text"/>	12	Young, Colin 7/21/2014	Young, Colin 7/21/2014
<input checked="" type="checkbox"/> Webster, LaurieSAW	Authorized Official	7/22/2014 - <input type="text"/>	11	Williams, Bernadette 7/22/2014	
<input checked="" type="checkbox"/> Young, ColinSAW	Authorized Official	11/3/2014 - <input type="text"/>	8	Young, Colin 11/3/2014	

Select "SAVE" at the top right hand corner of the screen to save the changes.

To manage roles at the document level:

- Browse to the parent document by searching for it on the "My Applications" page
- From the document's Application Menu, select "View Management Tools" (located under "Access Management Tools").

Document Information: [PRPR-JanMar2015-Deer Park-00087](#)

Parent Information: [WQC-2015-DeePar-00011](#)

 [Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Payment Request	Deer Park city of	Authorized Official	Payment Request/Progress Report In Process	N/A - N/A 03/31/2015 5:00PM PST

View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

[VIEW FORMS](#)

Change the Status

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

[VIEW STATUS OPTIONS](#)

Access Management Tools

Select the **View Management Tools** button below to perform actions such as adding people to this document or viewing the document history.

[VIEW MANAGEMENT TOOLS](#)

Examine Related Items

Select the **View Related Items** button below to view related items such as claims, messages, etc.

[VIEW RELATED ITEMS](#)

Select “Add/Edit People” and the list of current organization members will appear. The Authorized Official may now perform several actions:

1. To change the role of a member: Select the correct role for the member from the dropdown menu and enter an active date.
2. To deactivate a member: Enter an end date in the box below the active date.
3. To add a member: Select the check box next to their name to activate their role.

Person Search

Enter a name or partial name:

Current People Assigned

<input type="checkbox"/>	Person	Organization(s)	Role	Active Dates	Assigned By
<input checked="" type="checkbox"/>	SarahSAW Zehner Email	Applicant Organization, Applicant Organization 2 (Authorized Official)	Authorized Official	6/17/2015 <input type="text"/>	Ms. AlissaSAW Ferrell
<input checked="" type="checkbox"/>	BrianSAW Brada Email	Applicant Organization 2 (Authorized Official), Wave 5 Organization (Authorized Official)	Authorized Official	6/17/2015 <input type="text"/>	Grant System
<input checked="" type="checkbox"/>	ColinSAW Young Email	Applicant Organization (Authorized Official), BW Organization (Authorized Official), Applicant Organization 3 (Authorized Official), Wave6 Organization (Authorized Official), CY Test Org (Authorized Official), Rollover Test Org (Authorized Official), Ecology Fiscal Training Org (Authorized Official)	Authorized Official	6/17/2015 <input type="text"/>	Grant System
<input checked="" type="checkbox"/>	Dr. BrianEval EvalBrian Email	Department of Ecology (Authorized Official), BW Organization (Authorized Official)	Authorized Official	6/17/2015 <input type="text"/>	Grant System
<input checked="" type="checkbox"/>	Mr. David_SAW_test Dunn Email	Applicant Organization 2 (Recipient Financial Officer)	Authorized Official	6/17/2015 <input type="text"/>	Grant System
<input checked="" type="checkbox"/>	Ms. AlissaSAW Ferrell Email	Okanogan Conservation District (Authorized Official), Applicant Organization, Applicant Organization 2 (Contractor)	Authorized Official	6/17/2015 <input type="text"/>	Grant System

Select "SAVE" at the top right hand corner of the screen to save the changes.

 **TIP:** Find the person you are looking for by scrolling down the list. The document's Add/Edit People screen always lists all members in an organization. If a member is missing, verify that they successfully registered for SAW and EAGL.

 **TIP:** If a document was created before a user was added to the organization, the Authorized Official will have to manually add the user to the document or subdocument they need access to by checking the checkbox next to their name (if it is unchecked). Ensure the role is appropriate.

 **TIP:** A person can only have one role at the document or organization level (they can however have a different role at each level). For example, someone who is assigned as a "Reader" at the organization level can be assigned as the "Authorized Official" at the document level.

To manage roles at the sub-document level:

The process is the same as above, but you find the subdocument in a different way.

Browse to the Application Menu of the parent document. You can search for it using the "My Applications" page.

- Choose “Examine Related Items” from the Application Menu page.

 **Examine Related Items**
 Select the **View Related Items** button below to view related items such as claims, messages, etc.

VIEW RELATED ITEMS

- Select the appropriate subdocument that you want to manage roles for
- Subdocument’s menu page, select “View Management Tools” (located under “Access Management Tools”)
- Select “Add/Edit People.” The Authorized Official may now perform the operations described in the previous section.

 **TIP:** If you are on subdocument, you will see both “Document Information” and “Parent Information” at the top of the page. If you are on parent document, you will only see “Document Information.” “Document Information” always refers to the document you are currently working with.

Functions and Roles

Function	Organization Level Role	Document Level Role	Ecology Role
Assign Roles at the Organization Level	<ul style="list-style-type: none"> Authorized Official 	<ul style="list-style-type: none"> None 	<ul style="list-style-type: none"> Fund Coordinator
Assign Roles at the Document Level	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> Authorized Official 	<ul style="list-style-type: none"> Fund Coordinator
Update Organization Records	<ul style="list-style-type: none"> Authorized Official 	<ul style="list-style-type: none"> None 	<ul style="list-style-type: none"> None
Creates an Application	<ul style="list-style-type: none"> Authorized Official Contractor 	<ul style="list-style-type: none"> None 	<ul style="list-style-type: none"> None
Edit Applications (including application forms and uploading documentation)	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> Authorized Official Recipient Project Manager Contractor Writer 	<ul style="list-style-type: none"> None
Submit Applications	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> Authorized Official 	<ul style="list-style-type: none"> None
Initiate and Submit Equipment Report	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> Authorized Official Recipient Project Manager 	<ul style="list-style-type: none"> None
Initiate and Submit an Amendment	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> Authorized Official 	<ul style="list-style-type: none"> Funding Program Administrator Ecology Project Manager Ecology Financial

			Manager
Initiate and Submit Payment Request/Progress Reports and upload any associated documents	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> Authorized Official Recipient Project Manager Recipient Financial Officer 	<ul style="list-style-type: none"> None
Initiate and Submit a Closeout Report	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> Authorized Official Recipient Project Manager 	<ul style="list-style-type: none"> None

Order of Precedence

Assign Roles at the Document Level: The document level role takes precedence over the organization level role. For example, an Authorized Official at the organization level who is a Reader at the document level cannot modify that document's role assignments.

Submit Applications: The document level role takes precedence over the organization level role. For example, an Authorized Official at the organization level who is a Reader at the document level cannot submit an application.

Initiate and Submit a Closeout Report: Since subdocuments are children of a parent document, the parent document's roles determine who may initiate the subdocuments.



TIP: Each Organization should have at least two Authorized Officials to have a back-up in case someone leaves or is unavailable to make changes.



TIP: It is important to identify what staff base or default role should be set at the organization level, knowing that role will carry forward onto any documents created. Think about assigning roles to staff for a document that will apply through the life of the grant or loan.