

# Managing Organization Members and Their Roles

Ecology's Administration of Grants and Loans  
(EAGL)



# Three Levels of Role Assignments

Organization  
=System Roles  
(Default)

Application  
"Parent"  
Document  
(i.e. WQC-  
2015-  
AppOrg2-  
00235)  
= Current  
People  
Assigned

Parent Related  
"Subdocument"  
(Payment  
Request/Progre  
ss Report,  
Recipient Close  
Out Report)  
=Current People  
Assigned



# EAGL Access

- Users must have a registered Secure Access Washington (SAW) account.
  - Add EAGL as a service in SAW.
  - EAGL Administrator approves and assigns to your organization.



# System Roles (Default Organization Level)

System roles control what you can do in the system. People are assigned Organization Members as follows:

- **Authorized Official** –Allows a user to manage organization information, assign organization user roles, initiate, edit and submit applications, payment requests, amendments, and reports.
- **Contractor** –Allows a user to initiate and edit applications.
- **Recipient Project Manager** –Allows a user to edit applications, and initiate and submit payment requests and reports.
- **Recipient Financial Officer** –Allows a user to initiate and submit payment requests and reports.
- **Writer** –Allows a user to edit applications.
- **Reader** –Allows a user to only view applications and reports.



# Parent Document and Subdocument Level Roles

- Roles carry over.
- If a role change is needed, the Authorized Official will need to manually add/edit new members to document if it was created prior to change.



# Parent Document and Subdocument Level Roles

- Same types as the System Roles.
- Shows current people assigned to manage a specific parent document or related subdocument.



# Parent Document and Subdocument Level Roles

- Person can only have one role.
- If the same person needs to be the “Recipient Project Manager” and the “Recipient Financial Officer”, assign as “Authorized Official”.



# Recipient Contacts vs. Roles

## Recipient Contacts Form

- **Project Manager** –Designated by the applicant as the main contact for the grant or loan project management.
- **Authorized Signatory** –Designated by the applicant to sign the grant or loan agreement and amendments. (NOTE: This is independent of the system role)
- **Billing Contact** –Designated by the applicant as the main contact for billing related to the grant and loan.



# Recipient Contacts vs. Roles

## Recipient Contacts Form

- Person needs SAW and EAGL access to appear in dropdown list.
- **Not related to role assignments.**  
**Shows up on agreement document.**
- Authorized Signatory does not mean “Authorized Official”. Signatory can have a “Reader” role if they will not need edit or workflow access in the system.



# Member Role Tips

- Ensure person has SAW and EAGL access
- Keep member roles up to date
- Recommend assigning at least two people as “Authorized Official”. Only ones that can assign others!
- New users and role changes will need to be manually updated in a specific document.



# Member Role Tips

- A user can be a member of multiple organizations.
- **Do not uncheck members!**
  - Add an end date under “Active Dates” if no longer needed.
  - Disconnects account from the organization.



# Where to Find Roles in EAGL

## Default System Roles:

My Organizations>Organization Members

## Roles on a Parent Document:

Application Menu>Access Management  
Tools>Add/Edit People

## Roles on a Subdocument:

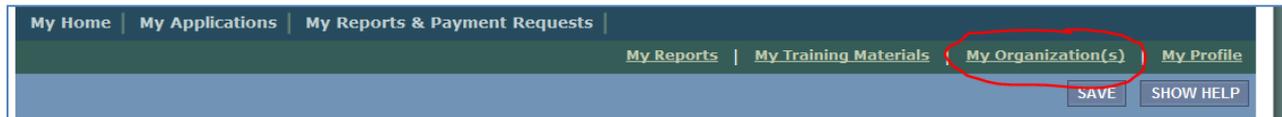
Application Menu>Examine Related Items>Select the  
specific document>Access Management  
Tools>Add/Edit People



# Where to Find Roles in EAGL

Default System Roles:

My Organizations > Organization Members



The screenshot shows the EAGL system navigation menu. The 'My Organization(s)' link is circled in red. Below the menu, the page title is 'Organization - Okanogan Conservation District'. The 'Organization Members' link is highlighted in yellow. The main content area shows instructions for adding members and a table of current members.

Organization - Okanogan Conservation District

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----- Results Per Page 20 GO

Person	Role	Active Dates	Active Documents	Assigned By	Modified By
<input checked="" type="checkbox"/> <a href="#">Doe, Mr. John</a>	Authorized Official	10/15/2013	4	Brian Brada 10/15/2013	Young, Colin 3/20/2015
<input checked="" type="checkbox"/> <a href="#">Ferrell, Ms. AlissaSAW</a>	Authorized Official	3/18/2015	4	Young, Colin 3/18/2015	
<input checked="" type="checkbox"/> <a href="#">Smith, Mr. Bob</a>	Recipient Financial Officer	10/29/2013		Brian Brada 10/29/2013	Ferrell, Ms. AlissaSAW 3/20/2015
<input checked="" type="checkbox"/> <a href="#">Smith, John</a>	Recipient Project Manager	10/21/2013	4	Brian Brada 10/21/2013	Young, Colin 3/20/2015
<input checked="" type="checkbox"/> <a href="#">Doe, Jane</a>	Writer	11/8/2013		Brian Brada 11/8/2013	Young, Colin 3/20/2015



# Where to Find Roles in EAGL

## Roles on a Parent Document:

[Application Menu](#)>[Access Management Tools](#)>Add/Edit People

[Back](#)

### Application Menu

Document Information: [WQC-2015-OkanCD-00009](#)

[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Application	<a href="#">Okanogan Conservation District</a>	Authorized Official	Agreement Active	N/A - N/A 12/04/2013 11:59PM 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](#)

[Back](#)

### Application Menu - Management Tools

The menu below contains links to the tools that can be used to manage this document.

Document Information: [WQC-2015-OkanCD-00009](#)

[Details](#)

### Management Tools

[CREATE FULL PRINT VERSION](#)

Select the link above to create a printable version of the document.

[CREATE FULL BLANK PRINT VERSION](#)

Select the link above to create a blank printable version of the document.

[ADD/EDIT PEOPLE](#)

Select the link above to perform actions such as adding people, changing a security role, or removing people from the document.

[STATUS HISTORY](#)



# Where to Find Roles in EAGL

Roles on a Parent Document:

Application Menu > Access Management Tools > Add/Edit People

[Back](#)

## Application Menu - People

The functionality on this page will allow you add, delete or edit people on this document.  
Use the keyword search function to locate a person you would like to add. Select the check box next to the name in the search results.  
Or, you can uncheck the box next to the person(s) name under the Current People Assigned area to remove people.  
After you perform your modifications, remember to select the **SAVE** button to save your changes.

Document Information: [WQC-2015-OkanCD-00009](#)  
[Details](#)

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"/>	Ms. AlissaSAW Ferrell <a href="#">Email</a>	Okanogan Conservation District (Authorized Official), Applicant Organization, Applicant Organization 2 (Authorized Official)	Authorized Official	7/24/2014 - <input type="text"/>	Shelly McMurry
<input checked="" type="checkbox"/>	BrianSAW Brada <a href="#">Email</a>	Applicant Organization 2 (Contractor), Wave 5 Organization (Authorized Official)	Authorized Official <input type="text"/>	1/13/2015 - <input type="text"/>	Brian Brada
<input checked="" type="checkbox"/>	Mr. David_SAW_test Dunn <a href="#">Email</a>	Applicant Organization 2 (Recipient Financial Officer)	Authorized Official <input type="text"/>	7/24/2014 - <input type="text"/>	Shelly McMurry
<input checked="" type="checkbox"/>	Saw-Shelly McMurry <a href="#">Email</a>	Deer Park city of (Authorized Official), Applicant Organization, Applicant Organization 2 (Authorized Official)	Authorized Official <input type="text"/>	3/20/2015 - <input type="text"/>	Colin Young



# Where to Find Roles in EAGL

Roles on a Subdocument:

Application Menu>**Examine Related Items**>Select the specific document>Access Management Tools>Add/Edit People

## Application Menu

Document Information: [WQC-2015-OkanCD-00009](#)

[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Application	<a href="#">Okanogan Conservation District</a>	Authorized Official	Agreement Active	N/A - N/A 12/04/2013 11:59PM 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](#)



# Where to Find Roles in EAGL

Roles on a Subdocument:

Application Menu>Examine Related Items>**Select the specific document**>**Access Management Tools**>Add/Edit People

**Application Menu - Related Items**

The various sections below can link to items that are associated with this document.

Document Information: [WQC-2015-OkanCD-00009](#)  
[Details](#)

Related Documents

Sort search results by: -- Select -- Filter by Document Type:

Document Type	Name	Current Status	Period Date / Date Due	Created By	Last Modified By
Equipment Purchase Report	<a href="#">Initiate a/an Equipment Purchase Report - 2015</a>				
Payment Request	<a href="#">Initiate a/an Jan - Mar 2015 Payment Request / Progress Report</a>				
Recipient Close Out Report	<a href="#">Initiate a/an Recipient Close Out Report - 2015</a>				
Equipment Purchase Report	<a href="#">EPR-2014-OkanCD-00023</a>	Equipment Purchase Report In Process	N/A - N/A 05/01/2025 12:00PM	David Dunn 7/21/2014 8:05:48 PM	David Dunn 7/21/2014 8:05:48 PM
Payment Request	<a href="#">PRPR-AprJun2014-OkanCD-00063</a>	Payment Request/Progress Report Active	N/A - N/A N/A	Mr. David_SAW_test Dunn 7/31/2014 9:22:39 AM	Jane Hicks 1/12/2015 2:08:20 PM
Payment Request	<a href="#">PRPR-JulSep2014-OkanCD-00100</a>	Payment Request/Progress Report Submitted	N/A - N/A N/A	BrianSAW Brada 1/13/2015 1:08:14 PM	BrianSAW Brada 1/13/2015 1:15:23 PM

**Payment Request Menu**

**Document Information:** [PRPR-AprJun2014-OkanCD-00063](#)  
 Parent Information: [WQC-2015-OkanCD-00009](#)  
[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Payment Request	<a href="#">Okanogan Conservation District</a>	Authorized Official	Payment Request/Progress Report Active	N/A - N/A

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

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

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

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



# Where to Find Roles in EAGL

Roles on a Subdocument:

Application Menu>Examine Related Items>Select the specific document>**Access Management Tools**>**Add/Edit People**

Payment Request Menu

Document Information: PRPR-AprJun2014-OkanCD-00063  
Parent Information: [WQC-2015-OkanCD-00009](#)  
[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date
	Payment Request	<a href="#">Okanogan Conservation District</a>	Authorized Official	Payment Request/Progress Report Active	N/A - N/A

**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 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](#)

Payment Request Menu - Management Tools

The menu below contains links to the tools that can be used to manage this document. See detail.

Document Information: [PRPR-AprJun2014-OkanCD-00063](#)  
Parent Information: [WQC-2015-OkanCD-00009](#)  
[Details](#)

Management Tools

**CREATE FULL PRINT VERSION**  
Select the link above to create a printable version of the document.

**CREATE FULL BLANK PRINT VERSION**  
Select the link above to create a blank printable version of the document.

**ADD/EDIT PEOPLE**  
Select the link above to perform actions such as adding people, changing a security role, or document.

**STATUS HISTORY**  
Select the link above to view the status history of this document.

**CHECK FOR ERRORS**  
Select the link above to check the entire document for errors.

**VIEW MODIFICATION HISTORY**  
Select the link above to view various modifications that people have made to specific pages

**ATTACHMENT REPOSITORY**  
Select the link above to view all attachments in this document.



# Where to Find Roles in EAGL

Roles on a Subdocument:

Application Menu>Examine Related Items>Select the specific document>Access Management Tools>**Add/Edit People**

## Payment Request Menu - People

The functionality on this page will allow you add, delete or edit people on this document. Use the keyword search function to locate a person you would like to add. Select the check box next to the name in the search result. Or, you can uncheck the box next to the person(s) name under the Current People Assigned area to remove people. After you perform your modifications, remember to select the **SAVE** button to save your changes.

Document Information: [PRPR-AprJun2014-OkanCD-00063](#)

Parent Information: [WQC-2015-OkanCD-00009](#)

[Details](#)

### 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"/>	Ms. AlissaSAW Ferrell <a href="#">Email</a>	Okanogan Conservation District (Authorized Official), Applicant Organization, Applicant Organization 2 (Authorized Official)	Authorized Official	7/31/2014 - <input type="text"/>	Grant System
<input checked="" type="checkbox"/>	Mr. David_SAW_test Dunn <a href="#">Email</a>	Applicant Organization 2 (Recipient Financial Officer)	Authorized Official	7/31/2014 - <input type="text"/>	Grant System
<input checked="" type="checkbox"/>	Mr. John Doe <a href="#">Email</a>	Okanogan Conservation District (Authorized Official)	Authorized Official	7/31/2014 - <input type="text"/>	Grant System
<input checked="" type="checkbox"/>	John Smith <a href="#">Email</a>	Okanogan Conservation District (Recipient Project Manager)	Recipient Project Manager	7/31/2014 - <input type="text"/>	Grant System
<input type="checkbox"/>	Mr. Bob Smith <a href="#">Email</a>	Okanogan Conservation District (Recipient Financial Officer)	Recipient Financial Officer	<input type="text"/> - <input type="text"/>	
<input type="checkbox"/>	Jane Doe <a href="#">Email</a>	Okanogan Conservation District (Writer)	Writer	<input type="text"/> - <input type="text"/>	

# Ecology's Administration of Grants and Loans (EAGL)

[www.ecy.wa.gov](http://www.ecy.wa.gov)

