Managing Secondary Effort Coordinators

Every School, Department, Division, and Center at Duke University is assigned a ten digit number known as an Org. Code and commonly referenced as the BFR Code. ECRT requires one Primary Effort Coordinator to be assigned to each Org. Code. ECRT will also allow an unlimited number of Secondary Effort Coordinator to be assigned to the Org. Code to assist in the Certification Process.

Effort Coordinators, both Primary and Secondary, are assigned their ECRT security profiles via an SAP Security Request. Requests must list the specific BFR codes and not just the top node of the BFR hierarchy. Therefore, requests to add, delete, or change the security profile of an Effort Coordinator must be submitted to your department’s SAP User Administrator.

Within ECRT, Secondary Coordinators automatically have access to all Certifiers in their assigned Org Code, but Primary Effort Coordinators can restrict Secondary Effort Coordinators only to specific Certifiers (see Control Secondary Effort Coordinator’s Access below). Additionally, the assignment of rights ONLY allows a Secondary Effort Coordinator the right to “Process” the Effort Statement(s) of the named Certifier. No other Primary Effort Coordinator rights are transferred.

**Note:** After the Effort Statement has been certified, assigning processing rights to the Secondary Effort Coordinator will **NOT** automatically move the Effort Statement to the Secondary Effort Coordinator’s Effort Tasks List. Primary Effort Coordinators can reassign tasks to Secondary Effort Coordinators using the Effort Task Listing Report discussed later in this guide.
ECRT Guide for Effort Coordinators

Managing Secondary Effort Coord. (cont.)

To access the Org. Code via the Org Code Dashboard:

On the ECRT Home Page:

![ECRT Home Page Screenshot]

**Note:** As a reminder, the options listed are based on your security roles assigned in ECRT. Therefore, only the options available for the roles assigned will display.

1. To access the **Org Code Dashboard**, go to the **Manage** page or select **Org Code Dashboard** from the dropdown menu when you hover over **Manage**.
On the Org Code Dashboard page

2. If you are the Primary Effort Coordinator with more than one assigned Org. Code, you must select the Org. Code you wish to work with:
   - In the **Search for Org Code** field, Select the **Drop-down** button or enter an Org Code.
   - Select the **desired Org. Code** from the list.
   - Select **Choose**.

   *Note: If only one Org Code has been assigned, the Org. Code is displayed.*

3. Select the **Org Code Information** tab to review information about the Org Code.

4. Scroll down to view information on the Org Code, the Effort Coordinators assigned to the Org Code, and the relationship of the selected Org Code to others.
Managing Secondary Effort Coord. (cont.)

To control Secondary Effort Coordinator’s Access:

On the Org Code Information tab:

1. Scroll down to view the **Org Code Effort Coordinator(s):** section and note the following:
   - The Effort Coordinator(s) assigned to the Org. Code are displayed per the SAP security profile.
   - The Primary Effort Coordinator’s name/row is highlighted in yellow.

2. On the row for the Secondary Effort Coordinator(s), under the Actions column, the **Manage Assignments** icon allows the Primary Effort Coordinators to restrict the access of Secondary Coordinators. Select that icon to make changes to the Certifiers that the Secondary Coordinator can access.
On the resulting Manage Assignments page:

Note: The top section restricts Secondary Effort Coordinator’s access to only assigned Certifiers. The bottom section sets the Secondary Effort Coordinator in an “Override” role of the Primary Effort Coordinator for the assigned Certifiers.

3. Review the Unassigned PI/Certifier List section containing all employees assigned to the Org. Code that are not assigned to the selected Secondary Effort Coordinator.

   Note: If you are ADDING a new Certifier assignment, names of the Certifiers already assigned to the Secondary Effort Coordinator will be displayed in the Assigned Certifier List box.

4. Use the following buttons to add or remove Certifiers from the Secondary Effort Coordinator’s assignment by selecting one, multiple or all of the Certifiers listed in the applicable section (Unassigned PI/Certifier List or Assigned PI/Certifier List) and move those names to the other section as follows:
Managing Secondary Effort Coord. (cont.)

- To move one Certifier from the Unassigned List to the Assigned List, select the name, then select the Move selected item in left list to right list button.
- To move all Certifiers from the Unassigned List to the Assigned List, select the Move all items in left list to right list button.
- To remove one Certifier from the Assigned List back to the Unassigned List, select the name and select the Move selected item in right list to left list button.
- To remove all Certifiers from the Assigned List back to the Unassigned List, select the Move all items in right list to left list button.

5. Once the Certifiers are selected and moved as needed, select the Save button to complete the process. Notice the message at the top of the page confirming the change as successful.

   Note: The selected Certifier’s name(s) now appear in the Assigned Department Certifier List.

6. Select the Close button to close the page.
7. To verify change, return to the People tab of the Org Dashboard and scroll to the Covered Individuals section of the page.

8. Notice the Secondary Effort Coordinators name is listed in the Alternative Effort Coordinator column.

Note: The Secondary Effort Coordinator has access ONLY to the Certifier(s) next to the Secondary Effort Coordinator’s name.

Note: This Alternative Effort Coordinator information will also be displayed on the Certifier’s Manage Users page.