

## 'Grant Manager Override' Instructions

**Purpose:** These instructions should be used for making project (53 account)-based Effort Coordinator reassignments in ecrt. For making or changing assignments based on Principal Investigator (PI), refer to the 'Manage Assignments' instructions.

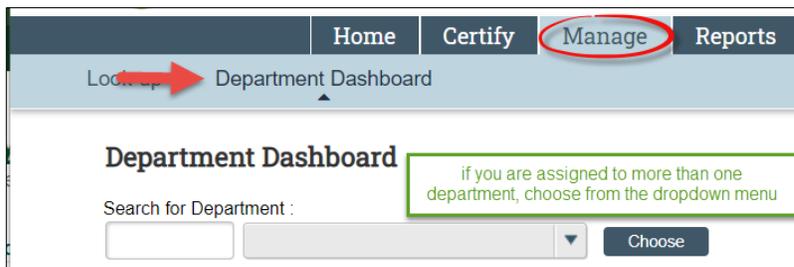
**Please note:** The Effort Coordinator role in ecrt is separately maintained from the Fiscal Officer and Account Manager roles in KFS.

By default, the Primary Effort Coordinator (PEC) is assigned as the Grant Manager for all projects. If another person needs to manage a project within the department, they need to be assigned as the **Grant Manager (Secondary Effort Coordinator)**. This means you are overriding the current Grant Manager (i.e. the PEC).

The **Grant Manager (Secondary Effort Coordinator)** will receive an automated e-mail from ecrt assigning them the task to Pre Review the project statements for which they were assigned. Assigned accounts and related Payroll Tasks will display on the Grant Manager's Home Page:

Statements Awaiting Certification	Pending Payroll Tasks (1)	Assigned Accounts (8)
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You can update the Grant Manager (Secondary Effort Coordinator) by navigating to the Department Dashboard. The Project Certifications tab will be displayed by default.



Project Certifications	Award and Account	Department Information		
<b>Project Certification Summary Chart:</b> Employee Type [Select] ▼ Period [Select] ▼ The default search is for project statements for all projects in this Department, for the current period of performance				
Status		Quarterly		
Building (not yet ready for certification) ✉		117	100.00%	
<b>Project Statements</b> 🔍 <input type="text"/> (If you would like to search for an apostrophe, please enter two apostrophes to return results)				
Project Nickname	Project Number	Grant Manager	PI	PI Department
Engineering Manufacturing Education Center (EMEC)	1374530	Loeser, Krysta - 821882706 +	N/A	N/A
Research Program - Stephen Guzik	1634653	Loeser, Krysta - 821882706 +	N/A	N/A
Cavity Enhanced Thomson Scattering Diagnostic for Electron Measurements in Weakly Ionized Discharges Student Adam Friss)	5300409	Loeser, Krysta - 821882706 + -	Yalin, Azer - 824250806	Mechanical E
Pre-Ionization Controlled Laser Plasma Formation	5300481	Loeser, Krysta - 821882706 + -	Yalin, Azer - 824250806	Mechanical E
EcoCAR3	5300563	Savig, Kristi - 822077761 + -	Bradley, Thomas - 828200528	Systems Eng
Biomechanical Analysis of the OLIF25 Plate Cage: A Cadaveric Study	5300698	Savig, Kristi - 822077761 + -	Puttlitz, Christian - 824499845	Mechanical E
Low-Cost, Versatile Sampler for Personal PM Exposure by Microenvironment	5300752	Loeser, Krysta - 821882706 +	Volckens, John - 822373000	Mechanical E

To assign a Grant Manager (Secondary Effort Coordinator) Override, the user selects the plus (+) icon next to the current Grant Manager (Secondary Effort Coordinator)'s name.

This brings up a search field where the user can search for an individual to assign as a Grant Manager (Secondary Effort Coordinator) Override for that project.

The screenshot shows the 'Project Certifications' tab with sub-tabs for 'Award and Account' and 'Department Information'. A 'Project Certification Summary Chart' is visible with filters for 'Employee Type' and 'Period'. Below this is a 'Status' section with options: 'Auto Approved', 'Ready for Certification', and 'Certified'. The 'Project Statements' section has a search field. A table lists project entries with columns for 'Project Nickname' and 'Project Number'. One entry is highlighted: 'Accurate Characterization of Winter Precipitation Using...' with project number '5300006' and manager 'Savig, Kristi - 822077761'. A red box highlights a search modal titled 'Enter Grant Manager Override:' with a search input field and a file icon. A red circle highlights the plus icon next to the manager's name in the table.

When a Grant Manager (Secondary Effort Coordinator) Override has been assigned, a red minus (-) will be displayed next to the plus icon.

A close-up of the manager name 'Loeser, Krysta - 821882706' with a plus icon (+) and a red minus icon (-) next to it.

Clicking on the minus icon removes the current Grant Manager (Secondary Effort Coordinator) Override.

**Note:** The minus icon only appears when a Grant Manager (Secondary Effort Coordinator) Override has been assigned.

You can also add a Grant Manager (Secondary Effort Coordinator) from the Account/Award Summary page:

The screenshot shows the 'Account Summary' page with the following details:

Account Name:	3D Printed Composite Tooling Development	Associated Department(s):	Mechanical Engineering
Account Nickname:	3D Printed Composite Tooling Development	Award Name:	3D Printed Composite Tooling Development
Account Number:	5302031	Start to End Date:	12/12/2019 to 10/31/2021
Account Type:	NonFederal	Account PI:	Donald W Radford - 822106678 (Primary Effort Coordinator: Krysta M Loeser - 821882706 )
Account Manager:	Brenda L Devlin - 822601907 (GM) +		

A red arrow points to the plus icon (+) next to the Account Manager's name.