

Video Tutorial: Managing eGC1 Personnel and Access
- Improvements to people management pages in SAGE

1. Intro-
 - Hello and thanks for accessing this SAGE tutorial. This brief video will show you the improvements to people management pages in SAGE occurring as part of the January 2011 release.

2. Purpose/ Overview-
 - The purpose of this eGC1 reorganization is to streamline managing the people involved with your application.
 - Prior to this release there were 3 pages that dealt with assigning access and managing personnel. Now there will be only 2 pages: one for persons involved in research activities and one for persons involved in administrative activities.
 - The same functionality will exist; it will just be located in one of the newly organized 2 pages.
 - Additionally, with this release, the ability to maintain contact information will now be available regardless of the status of the application.

3. Before and After View
 - We'll compare the new layout against the old to help you see the change with the function location.
 - Let's take a look at the new design.

4. Before January 2011- 3 pages
 - Before January 2011, managing people was handled within 3 pages- or locations.

5. Before January 2011- 4 views
 - And contained 4 sections for people management.
 1. We had a page for assigning access where we administered granting viewing or editing authority.
 2. We had adding or changing a PI
 3. We had adding and managing administrative and budget contacts
 4. And we had adding and managing additional research personnel.

6. Reorganization

- With our January release, we are reorganizing these sections into pages that work more logically together. We've moved adding and managing the PI to the same page with the functionality involving people working in research activities.
- And we've moved functionality involving administrative activities together into the same page - changing an administrative contact, or granting access.

7. The result

- The result is a consolidation from 3 pages to 2 pages, the need for a separate page for Access has been eliminated.
- It's now much simpler and more logical to manage people in SAGE
- It's the same functionality; it's just simpler to find.

8. New PI& Personnel page

- First off you will notice that you still land at the Details page when you open an eGC1- however, this page is now the top page – due to the elimination of the Access page.
- Let's go take a look at PI&Personnel
- Research personnel have been reorganized here.
- At this new page, you can perform 3 functions.
 1. Add the PI- in this case I am going to add myself.
 2. Add additional research personnel-same functionality- exactly like you did before-just click on the link- add personnel. I am going add Patti McClure.
 3. And respond to Significant Financial Interest Disclosure question- in this case we'll say no to both of these.
- The same functionality is in place, it has just been combined into a new page at the left navigation- called PI & Personnel.
- Please note that the policies about making changes to people assigned here remain in place. That is, once an application has been completed and is "routing " or "In OSP" status, you can only edit the PI & research personnel by withdrawing the eGC1. Once the eGC1 has been approved, no further edits to this page can be made. This is because research personnel are significant to the application.

Script for Video Tutorial:
SAGE January 2011 release

Tiffany Austin- Thursday, January 06, 2011

9. New Contacts & Assign Access page

- Now let's look at the new Contacts & Assign Access page. This is now organized to manage the administrative functions. Adding and maintaining the correct Administrative and pre-award budget contacts along with the ability to assign access has now been logically combined together.
- Again- same functionality is in place-using the look up buttons and link below to add a user and then assign the level of access they require.

10. Ability to edit Contacts & Assign Access

- In addition to the adjustments of the arrangement of these people components, a change has been made that will allow for continual maintenance of admin & budget contacts throughout lifecycle of proposals.
- This means that changes to Contacts can be made in any status. Staff will no longer have to withdraw an application or have contacts become "locked" because an application has been approved.
- The ability to make changes to access levels in any status has not changed and remains in place.
- Here is an example of an eGC1 that is in routing.
- Now lets look at the Contacts & Assign Access page.
- You can see that the fields are "open" and you are able to edit the information.
- *Note that these contacts displaying here as a result of being added either above on this page- or at the PI page.
- For the Admin and Budget contacts you simply scroll up and click the appropriate links above to make changes just as before.
- This means content on this entire page can now be edited regardless of the state of the application. This will allow you to better maintain current and accurate contact data.

11. Existing applications and Printing

- It's worth noting that any historical or archived applications you access will also display in this new structure- meaning that previously completed or awarded applications will display people data in the newly organized format.
- The information will be exactly the same- but you will need to remember to visit one of the 2 new pages to view it.
- There are no changes to the printing format as a result of these implemented improvements. A printed pdf of your eGC1 will be the same as before.

12. Summary:

- So in summary, the improvements to people management pages in SAGE with this eGC1 reorganization should provide a more streamlined and logical way to manage people information in your application.
- You can now make changes to Contacts regardless of the status of the application.
- The key is to remember that the separate Access page has been eliminated. The pages are now more logical- research personnel are together on the first page and administrative activities have been combined into the second.

13. SAGE Help Desk:

- We hope you find these improvements helpful. As always- if you need support- please contact the SAGE help desk for assistance.
- sagehelp@u.washington.edu

14. This concludes this SAGE Video Tutorial. Thanks very much for watching.