

Georgia Institute of Technology, Conflict of Interest Management Office

Administrative Users' Guide to eCOI

Reviewing Employee Annual Certifications
Reviewing Employee Financial Disclosures Related to Research
Reviewing and Approving/Disapproving Employee External Activities

INTRODUCTION

The purpose of this guide is to provide an overview for Deans, School Chairs, and unit administrators of how to use eCOI to review employee Annual Certifications, review employee financial disclosures related to research, and review and approve/disapprove external activities (consulting, advisory boards, etc.) that have been reported in eCOI.

Who has access to this application: Only those individuals designated as “School Officials,” “Chairs,” or “Department Administrators” by the Deans’ Offices and the COI Office in eCOI have access to the administrative functions of the system. If you are a Dean, your administrative views will be limited to information on persons in your College. If you are a Chair or a Department Administrator, your administrative views will be limited to information on persons in your School, Department, or Unit.

The system has detailed access control to ensure only appropriate individuals have access to appropriate information. The Georgia Tech Conflict of Interest Management Office is the only entity that has complete access to the information you submit.

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ACCESSING eCOI

In order to access this online system, you will need a computer that has the ability to connect to the Internet. This system is intended for use with Mozilla Firefox. It works with the most commonly supported browsers, such as Safari, Chrome, and Internet Explorer 8. However, users have experienced functional problems when using Internet Explorer 9. We strongly recommend using Mozilla Firefox. You may download Mozilla Firefox through the following website: <http://www.mozilla.org/en-US/firefox/fx/>

Instructions:

- Open your internet web browser and type or copy/paste the following information into the address bar <https://eCOI.research.gatech.edu>
- Log in to the system by using your Techworks ID and password.

Georgia Tech Login Service

When you are finished using all of your authenticated applications, please log out of this system and exit your browser to ensure you do not leave any of your applications (such as your e-mail) open to other users of this machine.

I don't know my GT Account
I don't know my password

For assistance, please contact the OIT Technology Support Center at 404-894-7173 (Mon-Fri 8am-5:00pm EDT).

Click here for additional documentation including how to integrate your application with GT Login

A Georgia Tech Username and Password are required to log into the eCOI system.

Georgia Tech usernames and passwords are provided by the Georgia Tech OIT Department to faculty and staff when hired. This should be the same password you use to log into Techworks. If you do not know your username and password, please contact the OIT Helpdesk at 404-894-7173.

Reviewing and Managing Annual Certifications

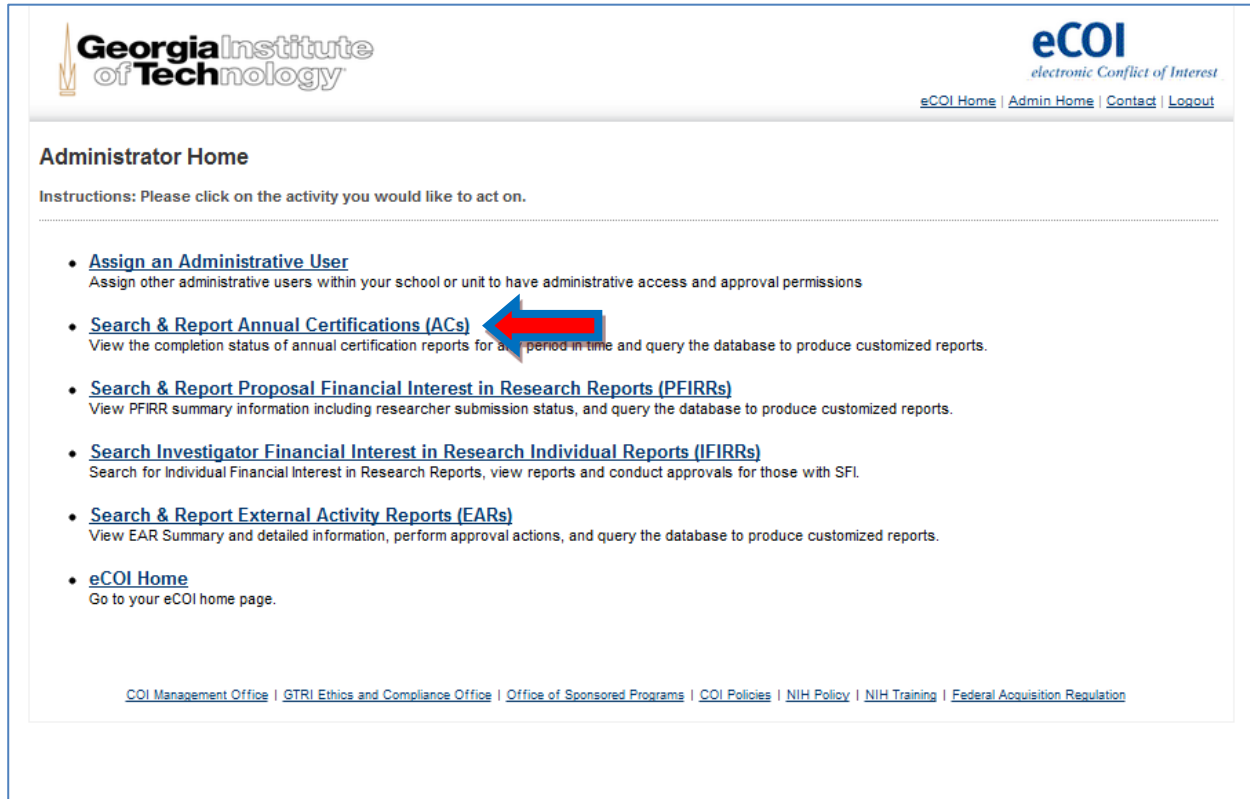
The next page you will see is the Administrator Home Page

Section Highlights:

- Search for and run reports on Annual Certifications from your Administrator Home page

Instructions:

- From the Administrator Home page, click “Search and Report Annual Certifications (ACs)”




Georgia Institute of Technology

eCOI
electronic Conflict of Interest

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Administrator Home

Instructions: Please click on the activity you would like to act on.

- [Assign an Administrative User](#)
Assign other administrative users within your school or unit to have administrative access and approval permissions
- [Search & Report Annual Certifications \(ACs\)](#) 
View the completion status of annual certification reports for a period in time and query the database to produce customized reports.
- [Search & Report Proposal Financial Interest in Research Reports \(PFIRRs\)](#)
View PFIRR summary information including researcher submission status, and query the database to produce customized reports.
- [Search Investigator Financial Interest in Research Individual Reports \(IFIRRs\)](#)
Search for Individual Financial Interest in Research Reports, view reports and conduct approvals for those with SFI.
- [Search & Report External Activity Reports \(EARs\)](#)
View EAR Summary and detailed information, perform approval actions, and query the database to produce customized reports.
- [eCOI Home](#)
Go to your eCOI home page.

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Annual Certifications

Section Highlights:

- Search for and review Annual Certifications
- Customize search using several different options
- Track employee completion and compliance

Instructions:

- Search by selecting one or more of the reporting fields

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Annual Certification Search and Reporting

Instructions: Select the criteria to perform a search and to view the corresponding report information.

President's Office » GTRC

Organization:

Form State:

Last Name:

First Name:

Report Year:

Date Search Type:

From:

To:

Report ID:

Include Terminated Users:

AC Reports Complete/Pending

100%

Yes Responses By Question

Count

[Show Questions](#) | [Email Reminder](#) | [Save Data as Excel...](#)

Annual Certifications							
Report ID	Name	Organization	State	Report Year	Submitted	Created	Actions
A21527	Steltzer, Angela	GTRC	Pending Completion	2012	--	06/11/2012	View Details/Approve View Report
A21525	Steltzer, Jeffrey	GTRC	Pending Completion	2012	--	04/20/2012	View Details/Approve View Report

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Annual Certifications

Section Highlights:


- Email a reminder to all employees or remind specific individuals to Complete their annual Certification

Instructions:

- Click "Email Reminder"



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Annual Certification Search and Reporting

Instructions: Select the criteria to perform a search and to view the corresponding report information.

President's Office » GTRC

Organization:

Last Name:

Date Search Type:

Report ID:

Form State:

First Name:

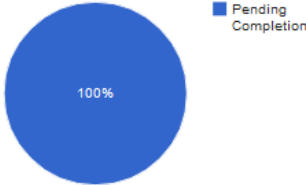
From:

Include Terminated Users:

Report Year:

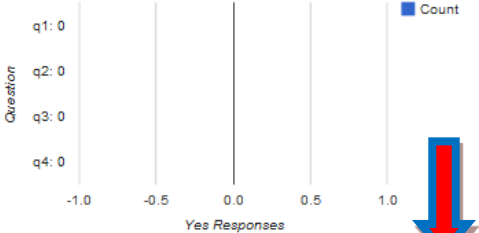
To:

AC Reports Complete/Pending



100%

Yes Responses By Question



Count

[Show Questions](#) [Email Reminder](#) [Save Data as Excel...](#)

Annual Certifications							
Report ID	Name	Organization	State	Report Year	Submitted	Created	Actions
A21527	Steltzer, Angela	GTRC	Pending Completion	2012	--	06/11/2012	View Details/Approve View Report
A21525	Steltzer, Jeffrey	GTRC	Pending Completion	2012	--	04/20/2012	View Details/Approve View Report

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Annual Certifications

Section Highlights:

- Email a reminder to all employees or remind specific individuals to Complete their annual Certification

Instructions:

- Click "ADD RECIPIENT"

The screenshot shows a web application interface for sending email reminders. The main window is titled "Email Reminder" and contains the following fields and buttons:

- Subject :** A text input field.
- To:** A dropdown menu with the option "ADD RECIPIENT.." highlighted by a red arrow.
- CC:** A dropdown menu with the option "ADD CC...".
- Message:** A large text area for composing the email body.
- Buttons:** "SEND MESSAGE" and "CANCEL" are located at the bottom of the form.

The left sidebar contains navigation links: "Annual C", "Instructions", "President's", and "Organization". Below these, there are search filters for "Last Name:", "Date Search Type:", and "Report ID:". At the bottom of the page, a table displays "Report ID" values: A21527 and A21525. The footer indicates "Page 1 of 1" and "View 1 - 2 of 2".

Annual Certifications

Section Highlights:

- Email a reminder to all employees or remind specific individuals to Complete their annual Certification

Instructions:

- Select individual employees or check "Select All" to email all employees who have not completed their Annual Certifications.

The screenshot shows a web interface for sending email reminders. A pop-up window titled "User Search" is open, displaying a table of "Annual Certifications". The table has the following data:

Seler	Report	Name	Organization	State	Report Y	Submittec	Creat
<input type="checkbox"/>	A21527	Steltzer, Angela	GTRC	Pending C	2012	--	06/11/:
<input type="checkbox"/>	A21525	Steltzer, Jeffrey	GTRC	Pending C	2012	--	04/20/:

Below the table, there is a pagination control showing "Page 1 of 1" and "View 1 - 2 of 2". A red arrow points to the "select all" link in the pop-up window.



Review Employee Financial Disclosures Related to Research

Section Highlights:

- Search for and run reports on employee financial interest disclosures related to specific sponsored research projects

Instructions:


- From the Administrator Home page, click "[Search Investigator Financial Interest in Research Individual Reports \(IFIRRs\)](#)"



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Administrator Home

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View the completion status of annual certification reports for any period in time and query the database to produce customized reports.
- [Search & Report Proposal Financial Interest in Research Reports \(PFIRRs\)](#)
View PFIRR summary information including researcher submission status, and query the database to produce customized reports.
- [Search Investigator Financial Interest in Research Individual Reports \(IFIRRs\)](#) 
Search for Individual Financial Interest in Research Reports, view reports and conduct approvals for those with SPI.
- [Search & Report External Activity Reports \(EARs\)](#)
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Review Employee Financial Disclosures Related to Research

Section Highlights:

- Search for and review IFIRRs
- Customize search using several different options

Instructions:

- Search by selecting one or more of the reporting fields
- View an individual's IFIRR by clicking on "View Report"



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Search Individual Financial Interest in Research Reports

Instructions: Select the criteria to perform a search and view the corresponding report information.

President's Office

Organization: State:

Last Name: First Name: Report ID:

Date Search Type: From: To:

Include Terminated Users:

[Save Data as Excel...](#)

Report ID	Name	Organization	Lead PI	Sponsor	Form Status	Created	Submitted	Actions
F20823-01	Steltzer, Jeffrey	GTRC	Steltzer, Jeffrey	Gene-60, PF2: Chang	No SFI	05/15/2012	05/30/2012	View Pfirr View Details/A View Report
F20862-02	Steltzer, Jeffrey	GTRC	Rimmer, David	Middle Georgia Tech	No SFI	06/19/2012	07/05/2012	View Pfirr View Details/Appro View Report
F20861-05	Steltzer, Jeffrey	GTRC	Pope, Larry	Force IFIRR state an	Archived	06/11/2012	--	View Pfirr View Details/Appro
F20871-01	Steltzer, Jeffrey	GTRC	Steltzer, Jeffrey	COI Office	Pending Completion	07/05/2012	--	View Pfirr View Details/Appro

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Reviewing and Approving/Disapproving External Activities

Section Highlights:

- Search for and run reports on External Activities

Instructions:

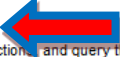
- From the Administrator Home page, click “Search & Report External Activity Reports (EARs)”



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Administrator Home

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Search for Individual Financial Interest in Research Reports, view reports and conduct approvals for those with SFI.
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External Activities

Section Highlights:

- Search for and review External Activities
- Customize search using several different options
- Provide Approval/Disapproval for External Activities

Instructions:

- Search by selecting from the reporting options, by last name, state, or a combination of several options



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Search External Activities

Instructions: Select the criteria to perform a search and view the corresponding report information.

President's Office » **GTRC**

Organization: All.. State: Pending Dean Approval
Report ID: Company: All.. Services: All..
Last Name: steltzer First Name: SFI: All..
Date Search Type: Submitted From: To:
Include Terminated Users:

SEARCH **RESET**

[Save Data as Excel...](#)

External Activities											
Report ID	Name	Company	SFI	Days	Service	State	Submitted	Start Date	End Date	Actions	
E17531	Steltzer, Jeffrey	Admin Guide Test	No	1	Consulting	Pending Dean Approval	07/05/2012	07/05/2012	07/28/2012	View Details/Approve	View Report

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External Activities

Reviewing External Activities

Instructions:

- Click "View Report" to review the proposed External Activity
- Click "View Details/Approve" to approve or disapprove the External Activity



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Search External Activities

Instructions: Select the criteria to perform a search and view the corresponding report information.

President's Office » **GTRC**

Organization: State:

Report ID: Company: Services:

Last Name: First Name: SFI:

Date Search Type: From: To:

Include Terminated Users:

[Save Data as Excel...](#)

Report ID	Name	Company	SFI	Days	Service	State	Submitted	Start Date	End Date	Actions
E17531	Steltzer, Jeffrey	Admin Guide Test	No	1	Consulting	Pending Dean Approval	07/05/2012	07/05/2012	07/28/2012	View Details/Approve View Report

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External Activities

View Details/Approve

Instructions:

- Click on the “Approve/Deny Form” box
- Select “Approval” action (Approve, Disapprove, Request Revisions, Review Not Performed)
- Input notes as appropriate
- Upload/attach documentation as needed
- Transaction History tab maintains a detailed audit trail




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External Activity Details

[Search another External Activity](#)

ID #: E17531
Name: Steltzer, Jeffrey
Company/Entity: Admin Guide Test
SFI?: No
Casefile Status:
Form Status: Pending Dean Approval
Anticipated Service: 1 days
Start Date: 07/05/2012
End Date: 07/28/2012
View Report: [View](#)
Assignee: None

Approve / Deny | Transaction History | Email History

Approval: 

Note:

Upload Documentation: [Choose file](#)

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NEED ADDITIONAL HELP?

Contact Information

Georgia Tech Conflict of Interest Management Office:

505 10th St NW
Atlanta, GA 30332

Phone: (404) 894-4819

Fax: (404) 385-2078

Email: COI@gatech.edu

Website: <http://www.industry.gatech.edu/innovators-entrepreneurs/conflict-of-interest>

GTRI Ethics and Compliance Office:

250 14th St NW
Atlanta, GA 30332

Phone: (404) 407-6972

Fax: (404) 385-2078

Email: Terry.Bridges@qtri.gatech.edu

Website: <https://webwise.qtri.gatech.edu/ecp>