

Key Member Change Instructions

1. Create spreadsheet(s) of roles and key members to be changed

- Run GA Reference Module in UBI
- Select your Project Own Org Name in the Quick Start Menu (or Award Own Org if changing Award Key Members)

The screenshot shows the UBI GA Reference interface. The 'Quick Start Selections List A' tab is active, and the 'Project Own Org Name' field is highlighted with an orange box. A blue arrow points to this field from the 'Change Req' tab in the top navigation bar. The interface includes various filters and data tables for awards and projects.

- Click on **Change Req** tab

The screenshot shows the UBI GA Reference interface with the 'Change Req' tab selected and highlighted with an orange box. A blue arrow points to this tab from the 'Change Req' tab in the top navigation bar. The interface displays summary statistics for awards and projects, including 'Open Projects' (24,942) and 'Active Awards' (12,835).

- Award Key Member Change Request is the default table.
- Press the Show **Project Key Member Change Request** button to switch to Projects

UBI UNIVERSITY BUSINESS INTELLIGENCE GA Reference

Quick Start A-P-T Awards Projects Expend Types **Change Req** Roles Status Review Award Vol

Select Dates Show Project Key Member Change Request

Select Award(s) Award Key Member Change Request

Award Number	Role Name	Role Holder Emp Nbr	Role Holder Name	Role Holder Start Date	Role Holder End Date	New Rol
BS00001	Award Manager	130552	Shuler, Lisa W	01-Jul-2015		
BS00001	Award Oversight 1	165092	Flippen, Candie C	01-Jul-2015		
BS00001	Award Oversight 2	123374	Kimata, Stephen A (Steve)	01-Jul-2013		
BS00002	Award Manager	121278	Aldridge, Crystal B	01-Jan-2010		
BS00003	Award Manager	121278	Aldridge, Crystal B	01-Jan-2010		
BS00004	Award Manager	121278	Aldridge, Crystal B	01-Jan-2010		
BS00005	Award Manager	153049	Alimard, Kristina M	01-Jan-2010		
BS00006	Award Manager	153049	Alimard, Kristina M	01-Jan-2010		
BS00007	Award Manager	153049	Alimard, Kristina M	01-Jan-2010		
BS00008	Award Manager	153049	Alimard, Kristina M	01-Jan-2010		
BS00009	Award Manager	153049	Alimard, Kristina M	01-Jan-2010		
BS00010	Award Manager	153049	Alimard, Kristina M	01-Jan-2010		
BS00011	Award Manager	153049	Alimard, Kristina M	01-Jan-2010		
BS00012	Award Manager	153049	Alimard, Kristina M	01-Jan-2010		
BS00013	Award Manager	153049	Alimard, Kristina M	01-Jan-2010		
BS00014	Award Manager	153049	Alimard, Kristina M	01-Jan-2010		
BS00015	Award Manager	153049	Alimard, Kristina M	01-Jan-2010		
BS00016	Award Manager	153049	Alimard, Kristina M	01-Jan-2010		
BS00017	Award Manager	153049	Alimard, Kristina M	01-Jan-2010		
BS00018	Award Manager	153049	Alimard, Kristina M	01-Jan-2010		

- Use Selection Panes along the left the margin to narrow results to the awards, projects, and roles you want change such as role name, current key member, etc.

UBI UNIVERSITY BUSINESS INTELLIGENCE GA Reference

Quick Start A-P-T Awards Projects Expend Types **Change Req** Roles

Select Dates Show Project Key Member Change Request

Select Award(s) Award Key Member Change Request

Award Number	Role Name	Role Holder Emp Nbr	Role Holder Name	Role Holder Start Date	Role Holder End Date	New Rol
BS00001	Award Manager	130552	Shuler, Lisa W	01-Jul-2015		
BS00001	Award Oversight 1	165092	Flippen, Candie C	01-Jul-2015		
BS00001	Award Oversight 2	123374	Kimata, Stephen A (Steve)	01-Jul-2013		
BS00002	Award Manager	121278	Aldridge, Crystal B	01-Jan-2010		
BS00003	Award Manager	121278	Aldridge, Crystal B	01-Jan-2010		
BS00004	Award Manager	121278	Aldridge, Crystal B	01-Jan-2010		
BS00005	Award Manager	153049	Alimard, Kristina M	01-Jan-2010		
BS00006	Award Manager	153049	Alimard, Kristina M	01-Jan-2010		
BS00007	Award Manager	153049	Alimard, Kristina M	01-Jan-2010		
BS00008	Award Manager	153049	Alimard, Kristina M	01-Jan-2010		
BS00009	Award Manager	153049	Alimard, Kristina M	01-Jan-2010		
BS00010	Award Manager	153049	Alimard, Kristina M	01-Jan-2010		
BS00011	Award Manager	153049	Alimard, Kristina M	01-Jan-2010		
BS00012	Award Manager	153049	Alimard, Kristina M	01-Jan-2010		
BS00013	Award Manager	153049	Alimard, Kristina M	01-Jan-2010		
BS00014	Award Manager	153049	Alimard, Kristina M	01-Jan-2010		
BS00015	Award Manager	153049	Alimard, Kristina M	01-Jan-2010		

*This table will only show active/open awards and projects.

- Export to Excel (Right click in the table and click on Export) – You will need to adjust the width of some of the columns.

Project Key Member Change Request

Project Number	Role Name	Role Holder Emp Nbr	Role Holder Name
102458	Approver	145043	Shuler, Lisa W
102458	Examiner	115406	Flippen, Candie C
102458	Fiscal Contact	115406	Kimata, Stephen A (Steve)
102458	Fiscal Officer	113768	Aldridge, Crystal B
102458	Project Manager	115406	Aldridge, Crystal B

Context Menu: Properties..., Sort, Copy, Print..., Send to Excel, Export...

2. Add replacement names to Spreadsheet(s)*

- You will need the Employee Name (exactly as it is stored in the Integrated System) and the Employee Number that will be added to a role.
 - This information can be found in the Eligible Key Member Report table, the table to the right of the Award/Project Key member change request table in the **Change Req** tab of the GA Reference Module.

The screenshot shows the 'GA Reference' interface with the 'Change Req' tab selected. The 'Project Key Member Change Request' table is on the left, and the 'Eligible Key Member Report' table is on the right. The 'Eligible Key Member Report' table has columns for 'Emp Num', 'Emp Name', and 'Emp Org'. A search bar is located at the top right of the interface.

- Click in the column name and type to filter by Employee Name or Employee Org.

The three screenshots illustrate the filtering process. The first screenshot shows the 'Eligible Key Member Report' table with columns 'Emp Num', 'Emp Name', and 'Emp Org'. The second screenshot shows the 'Emp Name' column selected, and the third screenshot shows the table filtered by 'AS-Astronomy'.

- Delete any projects/awards (rows) that have any status other than open.
- Copy Employee Number/Employee Name and paste into spreadsheet columns, New Role Holder Name/New Role Holder Emp Nbr
- You can use different replacements for different rows
- If desired, change the New Role Holder Start Date column to reflect the date you want the replacements to be effective (*it defaults to the date you ran the report*)
- If just end-dating a role without a replacement, put "NONE" in New Role Holder Name column (*certain roles MUST have a replacement*)
- Delete any rows you do not want changed
- Do not change column headings
- Do not change data in any columns other than Start Date

3. Send Spreadsheet to a Role Manager

- Send an e-mail with the spreadsheet attached to the Role Maintainer email address for your area
 - [List of Role Managers](#)

4. If 50 or more changes, Role Manager send spreadsheet to Enterprise Applications

- Send an e-mail to ea-garequests@virginia.edu
- Include:
 - Spreadsheet(s) with replacements
 - Name of Responsibility used by Role Managers
- IS will confirm Role Manager's Responsibility and will make the changes using that responsibility (thereby adhering to Role manager's limitations)