

# 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 selection options on the left, and data tables for awards and projects at the bottom.

- Click on **Change Req** tab

The screenshot shows the UBI GA Reference interface with the 'Change Req' tab selected in the top navigation bar. The 'Active Awards and Projects by Award Org' table is visible, showing counts for active awards and open projects. The 'Change Req' tab is highlighted with an orange box, and a blue arrow points to it from the 'Project Own Org Name' field in the previous screenshot.

MBU Award Own Org Name	Active Awards	Open Projects
Center for Leadership Excellence	0	2
PV-Assoc Prov-Acad Support	0	10
CO-Compliance	1	1
IT-CIO	1	10
CO-Chief HR Officer	2	1
CO-Records Management	2	1
BU-Child Development Ctr	2	4
CO-UVIMCO	2	4
OP-State Gov Relations-UVa	2	4
HS-HSF-General	2	54
CO-Audit Dept	3	3
BU-Mail Services	3	6
BU-Printing and Copy Services	3	6
CO-Organizational Excellence	4	3
PR-EOCR Office	4	6
PR-Board Office	4	8
IT-ITS Comm Svcs	5	8
SA-African American Affairs	5	8
DV-Assoc VP-HS	5	16
PR-General Counsel	6	6
CO-Office of Safety & Emergency Preparedness	6	7
OP-Real Estate and Leasing Services	6	8
	<b>12,835</b>	<b>24,942</b>

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

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.

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 Number	Role Name	Role Holder Emp Nbr	Role Holder Name
102458	Approver	145043	
102458	Examiner	115406	
102458	Fiscal Contact	115406	
102458	Fiscal Officer	113768	
102458	Project Manager	115406	

## 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.

Project Number	Role Name	Role Holder Emp Nbr	Role Holder Name	Role Holder Start Date	Role Holder End Date	New Role Holder Start Date	New Role Holder Emp Nbr	New Role Holder Name	Project Start Dt	Project Closed Dt	Project Status	Eligible Key Member Report
102458	Approver	145043	Skrutskie, Michael F	16-Sep-2015	-	16-Oct-17			25-May-01	-	Open	229492 Aadah, Richard C (Cameron) 31340 EN-Mat Sci/Engr Dept
102458	Examiner	115406	Johnson, Barbara Kay	14-Apr-2013	-	16-Oct-17			25-May-01	-	Open	218814 Aalami Harandi, Armin 40910 MD-ORTP Ortho Surg, Admin
102458	Fiscal Contact	115406	Johnson, Barbara Kay	16-Sep-2015	-	16-Oct-17			25-May-01	-	Open	196212 Aaron, Bradley J (Brad) 31890 AS-Religious Studies
102458	Fiscal Officer	113768	Jean, Lorrie L	05-Nov-2014	-	16-Oct-17			25-May-01	-	Open	141221 Aaron, Jeffrey 41120 MD-PSCH Psychiatry and NB Scie...
102458	Project Manager	115406	Johnson, Barbara Kay	01-Jul-2004	-	16-Oct-17			25-May-01	-	Open	200182 Aarons, Elizabeth 41025 MD-PEDT Pediatrics, Admin
102489	Approver	145043	Skrutskie, Michael F	16-Sep-2015	-	16-Oct-17			25-May-01	-	Open	210133 Abad-Jorge, Ana R 33220 CP-Instr-Centra

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

Emp Num	Emp Name	Emp Org
229492	Aadah, Richard C (Cameron)	31340 EN-Mat Sci/Engr Dept
218814	Aalami Harandi, Armin	40910 MD-ORTP Ortho Surg, Admin
196212	Aaron, Bradley J (Brad)	31890 AS-Religious Studies
141221	Aaron, Jeffrey	41120 MD-PSCH Psychiatry and NB Scie...

  

Emp Num	Emp Name	Emp Org
229492	Aadah, Richard C (Cameron)	31340 EN-Mat Sci/Engr Dept
218814	Aalami Harandi, Armin	40910 MD-ORTP Ortho Surg, Admin
196212	Aaron, Bradley J (Brad)	31890 AS-Religious Studies
141221	Aaron, Jeffrey	41120 MD-PSCH Psychiatry and NB Scie...
41025	MD-PEDT	

  

Emp Num	Emp Name	Emp Org
229461	Anderson, Bridget Clare	31670 AS-Astronomy
225990	Anguiano, Borja	31670 AS-Astronomy
175181	Arras, Philip Luke (Phil)	31670 AS-Astronomy
228969	Avilez, Ian E	31670 AS-Astronomy
208118	Balser, Dana S	31670 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 Maintainer

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

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

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