Maintaining Roles on Projects & Awards
GM Module IS

UHR Employee Development
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IS GM-Grants Management

Maintaining Roles on Projects & Awards

When to change personnel or key members on Awards and Projects?

1. Employee is leaving the Department to transfer to another Department
2. Employee is leaving the University
3. Employee is taking another position in the Department and will not be responsible for Projects or Awards

If the employee is listed 50 or more times as any of the below key elements on any combination of project and/or awards, the department or business unit may request that the Integrated System Deployment and Support (ISDS) auto-update the data elements.

Please fill out the Key Member Data Form located on the Integrated System website under forms.
Here is a link to the form:
Key Member Data Form
(http://www.virginia.edu/integratedsystem/forms/AwardProjectKeyMemberDataForm.doc)
Email the completed form to ISDS-FM@virginia.edu.

The list below is a snapshot of the Recon@UVa page.

For the most up to date information go to the current Recon@UVa website.
(http://www.virginia.edu/recon/contactus/team.html#Contacts)
# Role Managers and Subject Matter Experts by Major Units

Recruiting roles are maintained in the Integrated System (IS) by GH Role Managers.

## Executive Management

<table>
<thead>
<tr>
<th>Area</th>
<th>Role Managers</th>
<th>Subject Matter Experts/Testers</th>
</tr>
</thead>
<tbody>
<tr>
<td>President's Office</td>
<td>Missy Brads</td>
<td>Missy Brads</td>
</tr>
<tr>
<td>Executive Vice President and Chief Operating Officer</td>
<td><a href="mailto:recon@virginia.edu">recon@virginia.edu</a></td>
<td></td>
</tr>
<tr>
<td>EVP &amp; Provost</td>
<td>Mario Austin-Johnson</td>
<td>Mario Austin-Johnson</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:pv-recon@virginia.edu">pv-recon@virginia.edu</a></td>
<td></td>
</tr>
</tbody>
</table>

## Schools and Departments

### Architecture
- Lisa Benton  
  - ab-recon@virginia.edu

### Arts and Sciences
- Cathy Maupin  
  - en-recon@virginia.edu

### Batten
- Brenda Boyd  
  - bn-recon@virginia.edu

### Continuing and Professional Studies
- Victoria Savoy  
  - cn-recon@virginia.edu

### Curry
- Chris Peper  
  - cu-recon@virginia.edu

### Darden
- Kirby Armentrout  
  - da-recon@virginia.edu

### Engineering
- Mary Smith  
  - en-recon@virginia.edu

### Law
- Darlene Branch  
  - lw-recon@virginia.edu

### McIntire
- Susan Howell  
  - mc-recon@virginia.edu

### Medicine
- Nathan Namacak and Bert Butler  
  - md-recon@virginia.edu

### Nursing
- Elyse Koh  
  - nr-recon@virginia.edu

## Offices and Administration

### Athletics
- Ana Lynch  
  - at-recon@virginia.edu

### Development
- Linda Donohue  
  - dv-recon@virginia.edu

### Finance
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### Human Resources
- Scott Wilks  
  - hr-recon@virginia.edu

### Information Technology Services
- recon@virginia.edu

### Library
- Milly Crickanbarger  
  - lb-recon@virginia.edu

### Management & Budget
- recon@virginia.edu

### Research
- Anjula Joseph  
  - rs-recon@virginia.edu

### Student Affairs
- Scott Norris  
  - sn-recon@virginia.edu

### College of Wise
- Kristy Keer  
  - wi-recon@virginia.edu

### Southwest Virginia Higher Education Center
- Alicia Young  
  - sw-recon@virginia.edu
Maintaining Roles on Projects

**GM Role Managers or GM Limited Setup Specialists** can maintain the following key members on Grant & Contracts (G&C Reportable) Project Types:

1. Fiscal Contact (called Preparer in Recon@Uva)
2. Fiscal Officer
3. Examiner (optional role)

**GM Role Managers or GM Limited Setup Specialists** can maintain the following key members on **non-G&C Reportable** Project Types:

1. Project Manager
2. Fiscal Contact (called Preparer in Recon@Uva)
3. Approver
4. Fiscal Officer
5. Examiner (optional role)

**G&C reportable Projects and Awards**

Sponsored projects and awards are maintained by staff in OSP except for select key member roles on projects noted above.

UHR Employee Development's website houses toolkits for Integrated System Responsibilities.

Toolkit for UVA GM Role Manager and UVA GM Limited Setup Specialist.

([http://www.hr.virginia.edu/other-hr-services/employee-development/sys/new-GM-resp2013](http://www.hr.virginia.edu/other-hr-services/employee-development/sys/new-GM-resp2013))

**Procedure**

Log in to your UVA GM Setup Specialist or UVA GM Role Manager responsibility.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Employees with **UVA GM Role Manager** responsibility or **UVA GM Limited Setup Specialist** responsibility can maintain **Key Member** roles on projects.  
This example illustrates what you see if you are logged in as a **UVA GM Role Manager**.  
Click the **expand** button on the UVA GM Role Manager. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Double-click on <strong>Projects</strong>.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
3. | There are many ways to query Projects.
   
   You can search for one particular Project or all projects that meet certain criteria.
   
   This example illustrates finding all the *Active* Projects on which one employee holds the active Key Member role of ‘Fiscal Contact’. In this example ‘Roberts, Lynda M’ has been entered in the Key Member field (the employee number is populated automatically).
   
   In this example the Status field LOV has been selected and the *All Except CLOSED* status has been selected.
   
   In this example we are searching for Roberts, Lynda M in the Fiscal Contact role in all statuses *All Except CLOSED*.
   
   Click the **Find** button.
   
   The Projects, Templates Summary window lists all the projects, except those with status "closed," on which Lynda M Roberts is the current Fiscal Contact.
4. The Projects, Templates Summary window lists all the projects, except those with status "closed," on which Lynda M Roberts is the current Fiscal Contact.

Select a Project.

Click the **Open** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.</td>
<td>Click on <strong>Key Member</strong> in the options region.</td>
</tr>
</tbody>
</table>
### Step 6
Click the **Detail** button.

### Step 7
The Effective To date, 31-Mar-2013, has been entered for Lynda Roberts as Fiscal Contact.

Please note you may be changing more than one role in a session depending on the circumstances.

Press **[Enter]** to continue.
### Step 8

The Employee Name, 'Marbury, Patricia A (Patty)' has been selected.

Click the list of values (LOV) ellipsis in the **Role** cell to choose Fiscal Contact.

**NOTE:** The Fiscal Contact and the Approver cannot be the same person for non-G&C reportable project types. If this was a G&C reportable project type the Fiscal Contact and Principal Investigator cannot be the same person.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.</td>
<td>Select 'Fiscal Contact'. Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>10.</td>
<td>Enter the effective <strong>FROM</strong> date for the new role holder.</td>
</tr>
<tr>
<td></td>
<td>The day after the previous employee's <strong>TO</strong> date is the correct entry.</td>
</tr>
<tr>
<td></td>
<td>Enter a valid date e.g. a valid value e.g. &quot;01-APR-2013&quot;.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE:</strong> The required roles may not be vacant for even one day. Project Managers cannot have overlapping effective dates.</td>
</tr>
<tr>
<td></td>
<td>Select Save icon.</td>
</tr>
<tr>
<td></td>
<td>Recon@ will reflect changes the day after the <strong>Effective From</strong> date.</td>
</tr>
<tr>
<td></td>
<td>In this example above, a Recon@ role, the changes would be reflected in Recon@ the next day (02-April-2013).</td>
</tr>
<tr>
<td></td>
<td>Press <strong>[Enter]</strong> to continue.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>11.</td>
<td>Save your work then close.</td>
</tr>
<tr>
<td></td>
<td>Click the <strong>Close</strong> button.</td>
</tr>
</tbody>
</table>
12. Click the **Close** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>13.</td>
<td><strong>REMEMBER</strong></td>
</tr>
</tbody>
</table>

Required roles for **non-G&C Reportable Projects**:
- Project Manager
- Fiscal Contact
- Approver
  
  **NOTE**: The Fiscal Contact and the Approver cannot be the same person.

Required roles for **G&C Reportable Projects**:
- Fiscal Contact
  
  **NOTE**: Project Manager and Principal Investigator (PI) are also required but can only be changed by OSP, therefore won’t be shown in the role list of values for you to select.
  
  **NOTE**: The Fiscal Contact and Principal Investigator cannot be the same person.

The required roles should not be vacant for even one day.

When a person is no longer responsible for a project their **Effective To** date is entered. The succeeding person must be named and entered with the next day's date in the **Effective From** field.

Optional roles for all project types:
- Examiner
- Fiscal Officer

**NOTE**: On a G&C Reportable Project, if you tab to the Principal Investigator or Project Manager row and attempt to add a new record using the green plus sign icon (+) the message ‘This role cannot be updated on a sponsored program award, contact OSP’ will appear.

If you need to add a new key member to a G&C Reportable project, click on the Fiscal Contact row, then click the **New Record** icon.

When key member changes are required on 50 or more awards and/or projects you can request a mass update by completing the Key Member Data Element Change Request Form ([http://www.virginia.edu/integratedsystem/forms/AwardProjectKeyMemberDataForm.doc](http://www.virginia.edu/integratedsystem/forms/AwardProjectKeyMemberDataForm.doc)) found at the forms link on the IS website.
This concludes the topic, Revising Key Members on Projects.

**End of Procedure.**

### Maintaining Roles on Awards

If you have the responsibility and Log in as **UVA GM Role Manager** your access will allow you to maintain the Personnel, and only Personnel, on non-G&C Awards *even if you are not named* on the award.

If you have the responsibility and Log in as **UVA GM Limited Setup Specialist** your access will allow you to maintain the Personnel, Installments, and Project Funding, on non-G&C Awards if you are **named** on the award in the role **Limited Setup Specialist**.

**Procedure**
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Employees with **UVA GM Role Manager** responsibility or **UVA GM Limited Setup Specialist** responsibility can maintain **Key Member** roles on projects.  
This example illustrates what you see if you are logged in as **UVA GM Role Manager**.  
Double-click on **Awards**. |

![Image of the UVA Integrated System E-Business Suite](image-url)
### Step 2

There are many ways to query Awards.

You can search for one particular Award or all awards that meet certain criteria.

This example illustrates finding all the *Active* Awards on which one employee holds an active Key Member role. In this example 'Doherty, Marquita L (Marty)' has been entered in the Key Member field (the employee number is populated automatically).

In this example the Status field LOV has been selected and the Active status has been selected.

Click the **OK** button to select Active for the award status.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td>Click the <strong>Find</strong> button.</td>
</tr>
</tbody>
</table>

The Award Management Folder opens showing all of the active awards Doherty, Marquita L (Marty) has an active role on.
4. Select the first Award number returned by the query.

   Click in the **Number** field.

   DR00078
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.</td>
<td>Click the <strong>Open</strong> button.</td>
</tr>
</tbody>
</table>

![Image of software interface with Open button highlighted]
Step | Action
--- | ---
6. | The Award Management form opens. 
   Click the **Personnel** tab.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.</td>
<td>This employee left their position on 31-Mar-2013. Enter the desired information into the To field. Enter &quot;31-MAR-2013&quot;.</td>
</tr>
</tbody>
</table>
8. The green **plus sign** is the icon for new record.

Click the **New Record** icon on the menu bar.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.</td>
<td>The employee name, &quot;Schwab, Vicki Lynn&quot; has been selected. Search for the <strong>Award Role</strong> by clicking the field and entering an &quot;a&quot; then TAB. The Award Roles page displays. Select the appropriate Role from the list of values (LOV). In this example, the Award Oversight 1 has been selected. Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 10.  | Enter the effective **FROM** date for the new role holder.  
The day after the previous employee's **TO** date is the correct entry.  
Enter a valid date e.g. "01-APR-2013". |
### Step 11

Always save before closing.

Click the **Save** icon.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>12.</td>
<td>Click the <strong>Close</strong> icon.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 13.  | **Remember:**  
The required Role on an Award is Award Manager and it **should not be vacant for even one day and there can be no overlap.**  

To change personnel on an Award you need to be either a [UVA GM Role Manager](http://www.virginia.edu/integratedsystem/forms/AwardProjectKeyMemberDataForm.doc)  

OR  

A **UVA GM Limited Setup Specialist** who is **named** on the Award in the Limited Setup Specialist role.  

**Note:** When key member changes are required on 50 or more awards and/or projects you can request a mass update by completing the Key Member Data Element Change Request Form ([http://www.virginia.edu/integratedsystem/forms/AwardProjectKeyMemberDataForm.doc](http://www.virginia.edu/integratedsystem/forms/AwardProjectKeyMemberDataForm.doc)) found at the forms link on the IS website.  

This concludes the topic, Maintaining Roles on Awards.  

**End of Procedure.**