Project Key Member Mass Update

Use these instructions to add or change Project Key Members using mass update functionality when need to update more than one project with the same key member addition or change.

Prerequisites

You must have one of the following responsibilities to mass update project key members:

- ORG Account Establishment Administrator
- ORG Account Establishment Specialist with Budget Approval
- ORG Project Expense Appr Update (this responsibility only allows the user to update Expense Approvers roles on a project)

To facilitate using the mass update feature, be sure the following information is already entered in the system:

- The person is in the human resources module (people file).
- The projects must have a status of approved.

Project Selection Edits

- Person start date in HR/People file must fall within the approved Project start and end date in order for the person to be added as a key member.
- The effective from date when adding a key member must fall within the project start and end date in order for the person to be added as a key member.
- The effective end date when end dating a key member must fall within the project start and end date.
- The projects must have a status of approved.

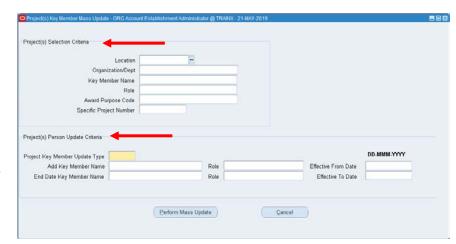**To Add or Change a Project Key Member on various Projects using Mass Update:**

1. Select **Project Key Member Mass Update** to go to the form **Project Key Member Mass Update Form**.
2. Enter one or more of the following fields to find and update the project(s) to mass update the key member. Various combinations are allowed to narrow the search:
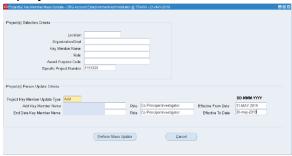
Selection Criteria

- Location
- Organization/Dept
- Key Member Name
- Role
- Award Purpose Code (all selected from the List of Values)
- Specific Project Number

Update Criteria

- Project Key Member Update Type (required). Select **Add** if the update is to add a key member with a role or select **Change** if the update is to replace a key member with a specific role. Select **End** if only needing to end date a key member.
- Add Key Member Name. The name of the key member you want to add to the projects from the list of values.
- Role. The role to be assigned to the key member you are adding or changing.
- Effective From Date
- End Date Key Member Name
- Role
- Effective To Date

3. Click **Perform** Mass **Update** and a list of project(s) that will be updated be returned with various information for review, prior to performing update.

4. Click **Continue** with **Mass Update** and all the projects on the screen are then updated with the key member change entered. **Note, when selecting this button, a job will automatically be submitted that will provide a printed report of the projects updated.**

5. Return to the main navigator and select **View > Requests** and select the job with the name 'RF Key Member Mass Update Report (XML Report Publisher)' and click the view output button for the PDF report of the projects and information that was updated.

Project No	Project Dept	Proj Short Name	Key Member Role	Add Key Member	Add Role	Eff From Date	Eff To Date	End Key Member	End Role
1153320	030 School of Nursing	030 School of Nursin			Co Principal Investi	31-MAY-2019			

Continue With Mass Update   (No Save) Cancel Update

Request ID		Name	Parent	Phase	Status	Parameters
27812274		XML Report Publisher		Pending	Standby	N, 27812273, 20003, RF_GMU
27812273		RF Key Member Mass Upd		Pending	Standby	171479450, , ,

Location: Action: Add   From Date: May 31, 2019
Organization: Add Key Member: To Date:
Key Member: Add Role: Co Principal Investigator
Role: End Key Member:
Award Purpose Code: End Role:
Project: 1153320   030 School of Nursing Suspense

Project No	Project Dept.	Proj Short Name	Key Member Role	Add Key Member	Add Role	Eff From Date	Eff To Date	End Key Member	End Role
1153320	030 School of Nursing	030 School of Nursing Suspense			Co Principal Investigator	5/31/2019			