MSS Position Distribution

Quick Reference Guide

Systems Control
10/2011
WHO CAN ACCESS THE REQUEST POSITION DISTRIBUTION DOCUMENT

Each workflow document requires a minimum of two participants: an Initiator and an Approver.

Initiating or creating a document requires
- Position Cross-Reference access

Documents require between one and three approvers
- HR Department Approver
- Department Funding Approver
- College/Division Funding Approver

College/Divisions determine the number of approval steps required
The Request Position Distribution Document is located in UAccess Employee – www.uaccess.arizona.edu

To access the document:
1. Click on the Manager Self Service menu item
2. Click on MSS Online Forms
3. Click on Position
4. Click on Request Position Distribution

The “Request Position Distribution” page provides multiple field search options for accessing the position for the distribution change request.

1. Enter the Position Number or other search criteria in the appropriate box in the “Find an Existing Value” section.
2. Click on the “Search” button
3. The “Position Distribution Select or Delete Request” page will display.
The “Position Distribution Select or Delete Request” page allows the user to:

- **Clone Distribution Info** - copy past position distribution to use as a template for creating a new effective-dated row to change a position’s distribution.

- **Select for Change** - current or future position distribution can be modified prior to the transaction effective date.

- **Select for Delete** – delete future position distribution prior to the transaction effective date.

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**HOW TO ADD AN EFFECTIVE-DATED ROW TO CHANGE FUNDING**

The “Position Distribution Select or Delete Request” page allows the user to “clone” or copy past funding to use as a template for creating a new effective-dated row to change a position’s distribution.

### 1. CLONING DISTRIBUTION INFORMATION

1. Click on the “Clone Distribution Info” box to select the funding row(s) to use as a starting point for the funding change request. Note: This action moves the transaction to the next page—“Change Position Distribution”.

2. **EFFECTIVE DATE OF THE CHANGE**
The effective date on the “Change Position Distribution” page automatically defaults to the beginning of the current pay period. It can be changed to reflect a future date—however, it will not accept changes for prior pay periods.

1. Enter the effective date if different than the populated value.

2. **CHANGING ACCOUNT AND/OR DISTRIBUTION PERCENT**

   The “Clone Distribution Info” option automatically populates the “Change Position Distribution” page with the account number and distribution percent associated with the transaction selected.

   To change the account and/or distribution percent
   1. Click and highlight the account(s) number or distribution percent(s) to be changed
   2. Type in the new account and/or percent value(s)

   Note: The distribution percent total must equal 100%

4. **ADD OR DELETE ACCOUNT DISTRIBUTION ROWS**

   To add or delete account funding rows
   1. Click on the green “add” button to add a row
   2. Click on the red “delete button to delete a row
5. Submitting Position Distribution Request for Approval

To submit the position distribution request for approval

1. Click on the “Submit” button

Note: The comments section can be used to further describe or explain the reason for the change.

6. Position Distribution Request Confirmation

Once a position distribution request is submitted, a confirmation page displays:

- Request Status -> Pending
- Transaction ID -> Assigned
- Approval routing steps at the bottom of the page
• Buttons to submit a “New Funding” request.

The request is now ready for approval.
HOW TO CHANGE CURRENT OR FUTURE DISTRIBUTION

Existing current or future distribution can be modified. The “Select for Change” option allows the user to modify an existing row of funding without changing the effective date.

1. SELECTING A DISTRIBUTION FOR CHANGE

To change the distribution

1. Click on the “Select for Change” check box

![Position Distribution Select or Delete Request]

2. CHANGING ACCOUNT AND/OR DISTRIBUTION PERCENT

The “Select for Change” option automatically populates the “Change Position Distribution” page with the account number and distribution percent associated with the transaction selected.

To change the account and or distribution percent

1. Click and highlight the account(s) number and/or distribution percent(s) to be changed
2. Type in the new account and/or percent value(s)
3. Click on the “Submit” button

![Change Position Distribution]

Note: See page 7 for instructions on adding and deleting account funding rows.

HOW TO DELETE ACCOUNT DISTRIBUTION PRIOR TO TRANSACTION EFFECTIVE DATE
Future account distribution can be deleted prior to the transaction effective date. The “Select for Deletion” option allows users to delete existing account distribution rows.

1. **SELECTING ACCOUNT DISTRIBUTION ROW(S) FOR DELETION**

To select the current or future dated account distribution row for deletion

1. Click on the “Select for Deletion” check box

![Position Distribution Select or Delete Request](image)

2. **SUBMITTING DISTRIBUTION DELETE REQUEST**

The “Delete Position Distribution” page displays a non-updateable red “Mark for Delete” alert which indicates that the selected record will be deleted upon submittal.

To submit the distribution delete request

1. Click on the “Submit” button

![Delete Position Distribution](image)

Note: The delete request can be cancelled by clicking on the “Cancel” button on the bottom right hand side of the page.

### APPROVING/DENYING REQUESTS
Position Distribution requests pending approval can either be accessed through the “pagelet” or the “Manage Distribution Requests” page. The option to approve a request will only appear if the user has both the appropriate approval role and is the next step in the approval chain.

1. **APPROVING THE POSITION DISTRIBUTION REQUEST**

To approve a position distribution request

1. Click on the “Approve” button

![Approve button](image)

2. **CONFIRMING APPROVED REQUEST**

Once the position distribution is approved, a confirmation page displays the information from the previous page in view only mode. The “green box” in the process monitor (the rectangular boxes on the bottom of the page) shows that the first approval step has been satisfied.

1. Click on the “Exit” button to return to the search menu

![Exit button](image)

2. **ADDING AD HOC APPROVERS AND REVIEWERS**

Ad hoc approvers and reviewers can be added by HR Department, Department Funding and College/Div Funding Approvers at any step following an approval step in the chain. For example, the HR Department can add an ad hoc approver or reviewer after the Department Funding or College Funding Approver steps. Note:
the Ad hoc “Approver” will stop the routing flow until the user takes action—the Ad hoc “Reviewer” notifies the user of the transaction and does not require approval.

To add an ad hoc approver or reviewer:
1. Click on the + sign to the right of the approval step the ad hoc reviewer will follow.
2. This will activate the “Insert additional approver or reviewer” window.
   a. Type in the user id for the ad hoc approver or reviewer
      a. See Approver/Reviewer Search below if the user id is unknown
   b. Click on either the “Approver” or the “Reviewer” radio button
   c. Click on the “Insert” button
3. Approver Reviewer Search
   The spy glass in the “Insert additional approver or reviewer” window will activate the “Approver/Reviewer Search” option (see previous section)
   1. Type the user’s name or user ID
   2. Click on the “Search” button
      A list of users meeting the search criteria will appear
   3. Select the ad hoc approver or reviewer by clicking on the individual’s name or user id.
      The “Insert additional approver or reviewer” window will reappear
   4. Click on either the “Approver” or the “Reviewer” radio button
   5. Click on the “Insert” button

HOW TO DENY POSITION DISTRIBUTION REQUESTS

The option to deny a request appears if the user has both the appropriate approval role and is the next step in the approval chain.

To deny a request
1. Type the reason for denial in the comments section
2. Click on the “Deny” button
2. POSITION DISTRIBUTION DENY CONFIRMATION

Once the position distribution is denied, a confirmation page displays the information from the previous page in view only mode. The process monitor shows that the position funding change has been denied. Additionally, an email is sent to the initiator notifying him/her of the denied request.

1. Click on the “Exit” button to return to the search menu

HOW TO RESUBMIT DENIED POSITION DISTRIBUTION REQUESTS

Initiators have the ability to resubmit denied position distribution requests by cloning the specific transaction in the “Request Position Dist (New)” page (navigation outlined in red on screenshot below).

To clone a denied position distribution request

1. Enter the position number in the search criteria in the “Request Position Dist (New)” page
2. Select the “Create New Distribution” radio button
3. Click on the “Clone from Denied Request” button

The position distribution request will pre-fill with the “Acct” information from the denied transaction.

4. Click on the denied “Transaction” link

5. Select the “Set Acct” link to change the distribution appearing on the request (See Chartstring Detail Screenshot)

6. Additional Account may be added or deleted by clicking on the “add” or “delete” buttons. The distribution percent should be adjusted accordingly.

7. Click on the “Submit” button
The “Chartstring Detail” window opens when the “Set Acctg” link is selected. The “Accept and Continue” button will capture the new account information; however, the transaction is not saved until the “Submit” button is selected upon return to the request page (previous screenshot).
Pending approval requests are available for viewing in two formats:

- Pagelets
- Manage Distribution Requests

### 1. HOW APPROVERS KNOW DOCUMENTS ARE PENDING THEIR APPROVAL

The UAccess Employee main page automatically displays a "pagelet" listing transactions pending the individual approver’s action.

- The "pagelet" provides a “position” link directly to the transaction requiring the user's approval.
- The "home" key on the first tab on the upper right side of the “Manage Distribution Request” page will reactive the “pagelet” after a transaction is approved or denied. (See next section)

### 2. HOW INITIATORS KNOW WHEN DOCUMENTS ARE APPROVED, DENIED OR PENDING

The "Manage Distribution Requests" allows users with the UAccess Employee Position Cross-Reference role to view position distribution change documents that are pending, approved or denied.

The Search dialog box provides multiple options for accessing position distribution transactions.

1. Enter the HR Dept or other criteria listed in the Search dialog box
2. Click on the “Search” button
   A list of values that meet the search criteria will be displayed
3. Click on any of the values listed to access specific transactions
   1. The user's role and current approval step will determine whether the record is view only or available for change or approval.
The following examples describe the workflow paths a user may encounter when initiating or approving a document.

**SELF APPROVAL**

Initiator with HR Dept, Department Funding or College Funding approval role(s)
- The step for the specific approval role automatically self approves when the request is submitted.

Please see the example below:
- HR Department Approver initiating a request

**AUTO APPROVAL**

Approver listed on multiple steps in path(s)
- Multiple paths for the same approver are automatically approved on all steps.

Please see the example below:
- College/Division approving a request in which they are listed in multiple paths/steps.
College initiates a request

- The Department Funding Approvers are notified of the change via email.
- The system requires 2 participants for a request; therefore, another College approver is required to take action.

Please see the example below:

![Diagram](image)

**NO ACCOUNT APPROVER FOUND**

Department Funding Approvers and College/Division Approvers

- Considered the "account" approvers
- One "account" approver required per transaction

In the example below an account approver was not found for either the department funding or college approver role. After the HR department approver has approved the request it will route to MSS Administrator for troubleshooting.

Please see the example below:

![Diagram](image)

**SKIPPED STEPS**

The system skips steps if it does not find approvers.
• Steps are skipped if no one is assigned to an approval role
• At least one “account” approver is required for the path

Please see the example below:

**NO APPROVERS FOUND**

Transactions routed to an Error Step if no approvers assigned
• All steps are skipped if no approvers are assigned
• An MSS Administrator will troubleshoot the transaction

Please see the example below:
ERROR/WARNING MESSAGES

The following examples describe the error or warning messages a user may encounter when initiating or approving documents.

ANOTHER APPROVER HAS TAKEN ACTION

A single step may have multiple approvers

- More than one approver can simultaneously review a transaction; however, only ONE can take action.

The following error message indicates another approver has already completed the step.

![Error Message](image)

EXPIRED OR FROZEN ACCOUNTS

The system will allow users to initiate and approve a transaction that includes frozen, deleted or expired accounts.

- The account number will be displayed in red upon creating the request.

All approvers will receive the warning message below indicating that the transaction contains a frozen, deleted or expired account:

![Warning Message](image)
EFFECTIVE DATE WARNING

Requests not approved by the due date
- A warning message notifies the approver that the due date for the pay period has passed.
- The system automatically changes the effective date to the next pay period.
- A systematic comment is added to the transaction indicating the old and new effective date.

See the warning message below:

![New Effective Date](image)

DISTRIBUTION DOES NOT EQUAL 100%

The account distribution for each effective dated period must equal 100%.

The following error message will be displayed if the total distribution for all account rows in a transaction does not equal 100%:

![Message from webpage](image)

EFFECTIVE DATE ENTERED FOR PAST PAY PERIOD

Previous pay period requests
- Distribution change requests for previous pay periods are not allowed once expenditures have posted for the dates specified.

The following message will display with the effective date field highlighted in red:

![Manage Position Distribution Request](image)

INVALID ACCOUNT ENTERED
Account validation
- Accounts entered by the user are validated against a table populated from the financial system.
- Accounts that do not exist in the account table are considered invalid.

The following error message will be displayed:
If you are experiencing problems or just have questions about the Manager Self Service Position Distribution, please contact the Workflow Administrators.

**WHO TO CALL????**

E-mail is the best communication method for contacting the Workflow Administrators. Please include both administrators when emailing. Their contact information is:

2. Esperanza Gallagher – espieg@email.arizona.edu
3. Abbie Montenegro – montenegroa@email.arizona.edu

The Mosaic Project – Workforce Administration Team phone number is:

- 626-9917