

Electronic Change in Source of Funds

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Electronic Change in Source of Funds

The electronic personnel action form for change in source of funds will apply to both prospective and retroactive changes.

Purpose:

The electronic change in source of funds (CSOF) will phase out the paper form PER 3 previously used to transfer salary expenses from one project to another. This will be used for both retroactive and prospective changes in salary distribution between and among projects.

For the full policy of what is required for CSOF when sponsored projects are involved, please see <u>Cost Transfer Policy</u>. The Cost Transfer form is still required in certain circumstances, and must be completed and its supporting materials uploaded into PeopleSoft using CSOF.

NOTE: Prospective and Retroactive Changes in Source of Funds (CSOF) functions may be used for both sponsored and non-sponsored projects.

Enter Prospective Change in Source of Funds

Procedure

In this topic you will learn how to Enter Prospective Change in Source of Funds.

Step	Action			
1.	The Prospective process transfers funds to be paid to the employee for work performed on an award. Prospective requests can only be submitted prior to on-cycle payroll being run.			
	NOTE: If the on-cycle payroll has been run, request will become a Retro rather than a Prospective.			
2.	NOTE: You cannot submit a new form for an employee with an outstanding (Pending) funding change form for either Prospective or Retro. The system will only allow one (1) pending Prospective and one (1) Retroactive PER.			

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Step	Action
3.	Click the NavBar button.
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4.	Click the Navigator button.
	Navigator
5.	Click the Down scrollbar.
6.	Click the LSUHSC Processes menu.
	LSUHSC Processes >

Step	Action
7.	Click the Change in Source of Funds menu. Change in Source of Funds
8.	 Row level security is based on both the employee's "Home" and "Funding" department. From the Search By list, you will be able to select the employee for your PER. <i>For training purposes only, you will use Empl ID 0000000.</i> Enter the desired information into the Empl ID field. Enter "0000000".
9.	Click the Search button. Search

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Step	Action			
10.	The Request Change in Source of Funds: Details page displays.			
	Click the View Job Data button.			
	View Job Data			

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Step	Action
11.	You can review the employee's current information on the Job Info page.
	Click the Down scrollbar.
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Step	Action
12.	You can review the employee's current information on the <i>Job Info</i> page. Click the Done button.

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Step	Action
13.	Instruction Text
	This text will only be displayed on initial form request. Approvers and viewers will not see this text.
14.	Click the button to the right of the Type field.

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Step	Action
15.	Туре
	There are two Types of Change in Source of Funds:
	Prospective - Updates department budget earnings with specified distributions changes and Effective Date.
	Retroactive - The process to transfer funds that were already paid to the employee and the project needs to be changed retroactively.
	Click the Prospective list item.
	Prospective

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Step	Action
16.	Justification
	The <i>Justification</i> field is a free form text field. Here you will enter the reason (e.g., opened new contract, transfer to state fund account, etc.) for initiating the PER.
	Enter the desired information into the *Justification field. Enter "Test".
17.	Adhoc Notify
	Use the <i>Adhoc Notify</i> field to send an additional notification (e.g., employee you are adjusting, Principal Investigator, etc.) after all approvals have been completed.
	NOTE: Only a person allowed access to the PeopleSoft HCM system will be able to receive Adhoc notifications. An Adhoc user can only view information if they have security access for the employee's home department.
	Click the Look up Adhoc Notify button.
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18.	Click the Search Criteria button.

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Step	Action
19.	Use the <i>Adhoc User ID</i> to search by Empl ID. Use the <i>Description</i> field to search by Last Name.
	For training purposes only, you will use "pgo" to search for the Adhoc User ID.
	Enter the desired information into the Adhoc User ID field. Enter "pgo".
20.	Click the Search button. Search
21.	Click in the Go, P field. PGO

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Step	Action
22.	Click the Down scrollbar.
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Step	Action
23.	Effective Date
	The <i>Effective Date</i> (EFFDT) is the date the change will begin to be used. The <i>Effective Date</i> must be greater than the current department budget earnings EFFDT, and must be greater than the last on-cycle payroll end date.
	Enter the desired information into the *Effective Date field. Enter "011521 " for training purposes only.

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Step	Action
24.	Current Department Budget Earnings
	The Current Department Budget Earnings field is display only. It lists the following:
	The employee's current department budget earningsEarnings is derived from annual rate with percentage distribution
25.	Click the Down scrollbar.

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Step	Action
26.	Totals
	 Total Earnings – total amount of current distributions Calc Dist Pct – total percentage of new distributions (used for Prospective changes)
27.	Сору
	Copy is an optional feature. It copies the current distributions into the "New Change in Source of Funds" grid.
	NOTE: If copying the current earnings is not helpful, do not use the copy feature.
	NOTE: If you have multiple distribution lines, users may find it helpful to use the copy feature. Users can then delete the distribution lines not needed under the New Source of Funds grid.
28.	Click the Copy button.
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Step	Action
29.	The <i>Totals</i> section displays the employee's current <i>Total Earnings</i> and <i>Calc Dist Pct</i> .
	<i>NOTE: Percentages must equal 100%. An error message will be received if the percentages do not total 100%.</i>
	Click the Down scrollbar.

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Step	Action
30.	Exercise
	You will change the current Percent from <i>100</i> to <i>85</i> . A new row will be added and the <i>Project ID 5352000001</i> will be used to search for the Combo Code 5352000001-502000 . The Percent for the new row will be <i>10</i> .
	<i>NOTE:</i> No line item under the New Source of Funds should = 0. It can cause potential errors, especially if it is a closed grant.

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31.	Enter the desired information into the Percent field. Enter "85".
32.	Click the Add a New Row button.
	NOTE: Use the Delete a Row (-) option to delete any distribution lines not needed.

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Step	Action
33.	The Combo Code is a project number with an account code. If you should use an incorrect Combo Code , an <i>error message</i> will display. <i>Error messages</i> will also display if the project is out of date range. The Project/Grant cannot be used beyond its budget period.
	NOTE: If a Combo Code does not exist, please contact Sponsored Projects for Sponsored Awards, Billing A/R for contracts, and General Accounting for Residual Balances and SGF projects.
	Click the Look up Combo Code button.

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Step	Action
34.	Click the Search Criteria button.
	Search Criteria

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Step	Action
35.	Enter the desired information into the Project/Grant field. Enter "5352000001".
36.	Click the Search button. Search
37.	Click the Down scrollbar.

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Step	Action
38.	Click in the 5352000001-502000 field.

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Com 1 035	Change in Sou mbo Code O de O	rce of Funds	ion Orneg		Account Code 0	Department	\$	0	0	Project ©	\$	\$	Α	10

Step	Action
39.	Enter the desired information into the Percent field. Enter "10".
40.	Click the Down scrollbar.

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Step	Action
41.	Click in the Submit field.
	Submit

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Step	Action
42.	An error message is received since the total distribution percent does not equal 100%. Click the OK button.

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Step	Action
43.	One of the percentages must be increased by 5% so that the combined total is 100%. Change line 2 Percent from 10 to 15. Enter the desired information into the Percent field. Enter " 15 ".
44.	Click the Submit button. Submit

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Current Department Budget Earr Specified Effective Date 5/6/2021 is not allowed. Allowable Effective Dates are between 6/1/2021 and 6/30/2021	gram Class ≎	s Project ⇔
Main Menu * > LSUHSC Processes * > PeopleTools * > Setup * > Value Lists • • • • • • • • • • • • • • • • • • •	01 10103	
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Step	Action
45.	Limit Effective Dates
	If a <i>Limit Effective Date</i> is specified for the form, the system will prevent users from creating Prospective forms that do not fall within the specified date range. A message, like the one shown here, will display stating the specified date is not allowed. Configured date limits are controlled on the value list below, where <i>Value</i> $1 = Minimum Date$ and <i>Value</i> $2 = Maximum Date$.

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Step	Action
46.	A <u>Non-Grant</u> project (e.g., resident contracts, hospital contracts, etc.) will give you a warning message with the option to stop or continue.
	If you answer "Yes", the form will continue with submission/approval.
	If you answer "No", the transaction will be stopped.

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Last on-cycle payroll (5/2/2021) has already been processed. This prospective funding transfer request cannot be processed for effective date (1/15/2021). Please deny this request and submit a new prospective/retro funding transfer form with appropriate dates Status		Delete	1 row	
1 Upload V		Delete		
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Step	Action
47.	An error message is received because the <i>Effective Date</i> is <u>not</u> greater than the last on-cycle payroll processing date. Click the OK button.
48.	Click the Up scrollbar.

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Step	Action
49.	Enter the desired information into the *Effective Date field. Enter "051521" .
50.	Click the Down scrollbar.
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Step	Action
51.	Click the Submit button.
	Submit

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Step	Action
52.	Pending e-Forms
	You <u>cannot</u> submit a new form for an employee with an outstanding (Pending) funding change form for either Prospective or Retro.
	NOTE: The system will only allow one (1) pending Prospective and one (1) Retroactive PER.

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Status 1 Add Comments	Uplo	ad		ОК	sable F	Prospecti		quests>			(te	row

Step	Action					
53.	System Disabled					
	 A message will display if the system has been disabled. This will occur when HCM entries cannot be allowed in the system, for example: <i>Payroll closing at the end of the month</i> <i>Year-end close out</i> The system may be disable for a few hours, or a day or two, depending on the catalyst for closing the system down. 					
54.	The <i>Request Change in Source of Funds: Results</i> page displays stating your e-form has successfully been submitted.					
	Click the View Approval Route button.					
	View Approval Route					

You have successfully submitted X +	0	-	o ×	<
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Step	Action		
55.	Submitter is CSOF Business Manager		
	The Approval Routing for Prospective Requests is shown.		
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Step	Action
56.	Submitter is NOT CSOF Business Manager
	The Approval Routing for Prospective Requests is shown here.
	Click the Done button.

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ePAF Change in S	ource of Funds request for John Doe was submitted successfully!				4
Click here to view	v.				
Name	John Doe				
Emplid					
Effective Date	5/15/2021				
Action	Prospective Change in Source of Funds				
Reason	Test				
Position					
Department					
Form ID	10838				
Submitted Dttm	5/31/2021 10:41 AM				
Submitted by					
Last updated by					
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Step	Action
57.	The Submitter will receive an email verifying the PER was successfully submitted. The Submitter can view the PER by selecting the " Click here to view " link. Click the Click here to view link. Click here to view

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Step	Action
58.	The completed Change in Source of Funds form displays.

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Step	Action
59.	Change in Source of Funds Approval Menu Option
	Users can also approve the CSOF from the menu options available on the Change in Source of Funds main page.
	Click the Approve Change Source of Funds button.
	Approve Change Source of Funds

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Step	Action
60.	Enter the desired information into the Empl ID field. Enter "0000000".
61.	Click the Search button. Search
62.	The Approve Change in Source of Funds: Details page displays. Scroll down to view your Approval options. Click the Down scrollbar.

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Step	Action
63.	Personnel Action Buttons
	Approve - Use to approve the PER and automatically send it to the next approver.
	Hold - Use to close the PER and keep it in the worklist until approved, denied or recycled.
	Recycle - Use to send the PER back to the initiator. This will trigger the routing process to restart once the initiator re-submits.
	Deny - Use to reject the PER and permanently end its processing.
64.	Users will select the appropriate option from among <i>Approve</i> , <i>Hold</i> , <i>Recycle</i> and <i>Delete</i> .
	<i>NOTE: Comments should be added if the PER is placed on Hold, Recycle, or Denied.</i>

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Your approval is r	equested.				
Click here to appr	-				
Name	John Doe				
Emplid					
Effective Date	5/15/2021				
Action	Prospective Change in Source of Funds				
Reason	Test				
Position					
Department					
Form ID	10838				
Submitted Dttm	5/31/2021 10:41 AM				
Submitted by					
Last updated by					
See below for any	comments related to this form:				
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Step	Action
65.	Email Approval
	The Approver will also receive an email stating his/her approval is requested. The Approver will select the " Click here to approve " link to access the PER.
	Click the Click here to approve link.
	Click here to approve

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John Doe	
Empl Rcd: 0 View Job Data	
Approve Change in Source of Funds : Details	Form ID 10838
Please fill out the form below on request for change in source of fund for specified employee.	
Funding Transfer type includes:	
 Retroactive Changes to distributions that have already been paid. Prospective Changes to existing department budget earnings distribution that will affect future pay. 	
Change in Source of Funds	
Type Prospective	
Test Justification	
Adhoc Notify PGO Go P	
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Step	Action
66.	The Approve Change in Source of Funds: Details page displays. Approvers should review the PER for correctness and completeness.
	Click the Down scrollbar.
	▼
67.	<i>NOTE: Comments should be added if the PER is placed on Hold, Recycled, or Denied.</i>
	Click in the Approve field.
	Approve

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Step	Action
68.	The Approve Change in Source of Funds: Results page displays once the user has selected Approve. The transaction path also displays on the page.

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PeopleSo	2021 11:42 AM Oft LSUHSC <no-reply> T - ePAF 10838 - Prospective Change in Source of Funds for John Doe Completed</no-reply>	~
ePAF Change in S Click here to view	Source of Funds request for John Doe has been completed.	
Name	John Doe	
Emplid		
Effective Date	5/15/2021	
Action	Prospective Change in Source of Funds	
Reason	Test	
Position		
Department		
Form ID	10838	
Submitted Dttm	5/31/2021 10:41 AM	
Submitted by		
Last updated by		
See below for any	comments related to this form:	
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Step	Action
69.	Notification on Final Approvals
	The following groups will be notified once a request is <i>completely approved</i> : • Original Submitter • Business Manager • Delegated Manager
	Click the Click here to view message link.
	Click here to view

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Type Prospective			
Justification			
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Effective Date 05/15/2021 Fiscal Year 2021 Total Earnings 28337.59			•
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Step	Action
70.	The View Change in Source of Funds: Details page displays.
71.	This completes <i>Enter Prospective Change in Source of Funds</i> . End of Procedure.

Retroactive Change in Source of Funds

Procedure

In this topic you will learn how to Enter Retroactive Change of Sources Funds.

Step	Action
1.	The Retroactive process transfers funds that were already paid to the employee, but the project needs to be changed retroactively.
	<i>NOTE: Creating a Retroactive Change in Source of Funds will update</i> <i>PAY_ERN_DIST with the specified changes.</i>

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Step	Action
2.	For training purposes only, the EMPL ID 0000000 will be used.
	Enter the desired information into the Empl ID field. Enter "0000000".
3.	Click the Search button.
	Search

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John Doe Empl Rcd: 0 View Job Data				
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Please fill out the form below on request for change in source of funds for specified employee.				
Change in source of funds type includes:				
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Step	Action								
4.	e Request Change in Source of Funds: Details page displays								
	Click the View Job Data button.								
	View Job Data								



Step	Action
5.	You can review the employee's current information on the Job Info page.
	Click the Down scrollbar.



Step	Action
6.	You can review the employee's current information on the Job Info page.
	Click the Done button. Done

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Type ~				
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Step	Action
7.	Instruction Text
	This text will only be displayed on initial form request. Approvers and viewers will not see this text.

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John Doe Empl Rcd: 0 View Job Data		
+ Request Change in So	ource of Funds: Details	Form ID 10844
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Prospective Changes to exis Change in Source of Funds	ributions that have already been paid. sting department budget earnings distribution that will affect future pay.	

Step	Action
8.	Click the *Type dropdown button to activate the menu.
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Step	Action								
9.	Туре								
	There are two <i>Types</i> of Change in Source of Funds:								
	 Prospective - Updates department budget earnings with specified distributions changes and Effective Date. Retroactive - The process to transfer funds that were already paid to the employee and the project needs to be changed retroactively. 								
	Click the Retroactive list item. Retroactive								

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Step	Action
10.	Justification
	The <i>Justification</i> field is a free form text field. Here you will enter the reason (e.g., opened new contract, transfer to state fund account, etc.) for initiating the PER.
	Enter the desired information into the *Justification field. Enter "Retro Processing ".
11.	Adhoc Notify
	Use the <i>Adhoc Notify</i> field to send an additional notification (e.g., employee you are adjusting, Principal Investigator, etc.) after all approvals have been completed.
	NOTE: Only a person allowed access to the PeopleSoft HCM system will be able to receive Adhoc notifications. An Adhoc user can only view information if they have security access for the employee's home department.
	Enter the desired information into the Adhoc Notify field. Enter "KOC".
12.	Click the Down scrollbar.

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Step	Action
13.	Retro Data Range Search
	Enter parameters to search for date range and account to retro if needed.
	 <u>Cannot</u> cross Fiscal Year Each CSOF can only affect <u>one</u> Fiscal Year SGF from a prior Fiscal Year may <u>not</u> be moved

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Step	Action
14.	From/End Dates
	The error message shown here will display if the <i>From/End</i> dates cross Fiscal Years.
15.	Exercise
	The <i>From Date</i> will be 02/01/21 and the <i>End Date</i> will be 03/01/21.
	Enter the desired information into the *From Date field. Enter "020121" .
16.	Enter the desired information into the *End Date field. Enter "030121 ".
17.	Press [Tab].

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Step	Action
18.	Account
	If the * <i>Expense Account Code</i> displays as shown here, select the Account to be retro'ed. Only <u>one</u> account can be retro'ed per request.

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Step	Action
19.	Pay Earnings Distribution Summary
	The <i>Pay Earn Dist Summary</i> displays providing a list of summary totals of Pay Earnings Distributions specified by the parameters set in the <i>Retro Date Range Search</i> .
	Click the Down scrollbar.
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New Change in Source of F	unds													

Step	Action
20.	Select "Yes" to the <i>Combo Code</i> you wish to adjust. The <i>Combo Code</i> is the <u>Project-Account</u> code. The <i>Combo Code</i> selected <u>must</u> be within budget effective dates. Click the Selected Yes option.

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Step	Action
21.	Totals • Copy – copy current distribution into "New Change in Source of Funds" grid • Total Earnings – total amount of current distributions • Calc Earnings – total amount of new distributions Click the Copy button.
22.	Click the Down scrollbar.
23.	New Change in Source of Funds Users must specify the new project to move the Change in Source of Funds into.

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Step	Action
24.	A new row <u>must</u> be created to add a new Combo Code.
	Click the Add a New Row button.

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Step	Action
25.	Enter the desired information into the Amount field. Enter "4421.75".
26.	You can only use the Account Code a person is set up under. The system will <u>not</u> allow you to cross Accounting Codes. Enter the desired information into the Combo Code field. Enter " 105200231A ".
27.	The <i>Combo Code</i> can be searched for by using the magnifying glass. Click the Look up Combo Code button.
28.	Scroll the Down with the mouse wheel.

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Step	Action
29.	Scroll the 105200231A-502000 button with the mouse wheel.

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Step	Action
30.	Amount
	Total Amount <u>must</u> match Total Earnings.
	Enter the desired information into the Amount field. Enter "1000.00".
31.	Click the Down scrollbar.

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Empl Rcd: 0 View Job Data				
Cost Transfer				_
You have included a Federal Funded project under the New Change of Source of Funds. The <u>Cost Transfer Policy</u> states that a <u>Cost Transfer form</u> is required when a cost is transferred on to a federal award (or subaward). A cost transfer form is not required when costs are transferred off a federal award and on to a non-federal award.				
Is effort being increased on a Federal award (or				
subaward)?				
 Since effort is not being increased on a Federal Funded Project a cost transfer is not necessary. 				
<u>Time and Effort Forms</u> are produced to certify Federal Effort per the Uniform Guidance. Time and Effort reports should be revised if effort of 5% or more on has been changed on a Federal award (or subaward).				
Time and Effort Cerification Periods: Monthly employees – Semi-annual (Jul – Dec), (Jan – Jun) BiWeekly employees – Quarterly (Jul – Sept), (Oct – Dec), (Jan – Mar),				
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Step	Action
32.	Is effort being increased on a Federal award (or sub-award)?
	This is a simple Yes or No answer.
	If No , a cost transfer is not necessary.
	Click the Yes option.
	No
33.	Is effort being increased on a Federal award (or sub-award)?
	If Yes , a cost transfer <u>must</u> be attached.
	Click the Down scrollbar.

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Step	Action
34.	Does Time and Effort report need to be revised?
	This is a simple Yes or No answer.
	If No, a Time and Effort report does not need to be attached.
	Click the Yes option.
	No
35.	Does Time and Effort report need to be revised?
	If Yes , a revised Time and Effort report <u>must</u> be attached.

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Step	Action
36.	Click the Upload Cost Transfer button.
	Upload



Step	Action
37.	Click the My Device button.

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Step	Action
38.	Click the Documents menu.
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Step	Action				
39.	Click the Cost Transfer link.				
40.	Click the Open button.				
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Step	Action
41.	Click the Upload button.
	Upload
42.	Click the Done button.
	Done
43.	Click the Upload Time and Effort button.
	Upload
44.	Click the My Device button.

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Step	Action
45.	Click the Time and Effort - revised link.
	A Time and Effort - revised
46.	Click the Open button.
	Open

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Step	Action
47.	Click the Upload button.
	Upload
48.	Click the Done button.
	Done

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Step	Action
49.	Click the Submit button.
	Submit

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Step	Action
50.	Only a project that is in the effective date range for the period adjusting will be allowed. An error message will appear if the project is out of date range. NOTE: This message will display <u>after</u> clicking the "Next" button at the bottom of the page.

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Step	Action
51.	Non-Grant Project Warning Message
	A message for a <i>Non-Grant Project</i> will give a warning and option to stop or continue if specified effective date is invalid.
	<i>NOTE: This message will display <u>after</u> clicking the "Next" button at the bottom of the page.</i>
	If "Yes" is selected, continue with Submission/Approval for the form.

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Step	Action
52.	Non-Grant Project Warning Message
	If "No" is selected, a message will display stating the transaction was stopped.

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Step	Action
53.	A message displays if the new funding change account is different from the original funding account. The new funding change account <u>cannot</u> use more than one Account. Click the OK button.

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Step	Action
54.	Change the <i>Account</i> number for the Combo Code from <i>502000</i> to <i>501000</i> . Make sure there is a hyphen between the Project/Grant number and the Account number.
	Enter the desired information into the Combo Code field. Enter "501000".
55.	Federal/Grant
	Cost Transfer will be available for input if Combo Code is "Federal".
56.	Retro Restrictions
	 Retro restrictions prevent conflict with on-cycle payroll processing. Restriction will be triggered when all of the following conditions are met: On-Cycle Payroll Pay Confirm Run GL Processing (PAYGL02) is NOT done
	An <i>Error</i> notification email will be sent to DEV and Support Group to verify the error was intended. Once Payroll finishes on-cycle processing, Support will bring up the form ID and " <i>Resubmit MSG</i> ." Post-processing for Retro requests will resume and Notifications will be sent to all participants upon completion.

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Step	Action
57.	Click the Submit button.
	Submit



Step	Action
58.	<i>NOTE: The system will only allow one (1) pending Prospective and one (1) Retroactive PER.</i>
	You <u>cannot</u> submit a new form for an employee with an outstanding funding change form for either Retro or Prospective.

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						Refresh
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1 05/31/2021 3:58:10PM	Initiated			Submit		
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Step	Action
59.	A message displays stating your PER has successfully been submitted.
	Click the View Approval Route button.
	View Approval Route

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Step	Action
60.	Submitter is CSOF Business Manager
	The Approval Routing for Retroactive Requests that contain <i>Federal</i> and <i>Grant</i> accounts is shown here.
	Click the Done button.

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Step	Action
61.	Submitter is CSOF Business Manager
	The Approval Routing for Retroactive Requests that do <u>not</u> contain <i>Federal</i> <u>or</u> <i>Grant</i> accounts is shown here.

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Step	Action
62.	Submitter is CSOF Business Manager
	The Approval Routing for Retroactive Requests that <u>contain</u> <i>Federal</i> accounts, but do <u>not</u> contain <i>Grant</i> accounts, is shown here.

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Step	Action
63.	Submitter is CSOF Business Manager
	The Approval Routing for Retroactive Requests that do <u>not</u> contain <i>Federal</i> accounts, but <u>do</u> contain <i>Grant</i> accounts is shown here.

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Step	Action
64.	Submitter is NOT CSOF Business Manager
	The Approval Routing for Retroactive Requests that do <u>not</u> contain <i>Federal</i> <u>or</u> <i>Grant</i> accounts is shown here.

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Step	Action
65.	Submitter is NOT CSOF Business Manager
	The Approval Routing for Retroactive Requests that <u>contain</u> <i>Federal</i> accounts, but do <u>not</u> contain <i>Grant</i> accounts, is shown here.

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Step	Action
66.	Submitter is NOT CSOF Business Manager
	The Approval Routing for Retroactive Requests that do <u>not</u> contain <i>Federal</i> accounts, but <u>do</u> contain <i>Grant</i> accounts, is shown here.

	Cancel You have s	successfully submitted your eForm.	Done 1 (
	Review/Edit Approvers		
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insacti Curre	Multiple Approvers Sponsored Projects		1 n Elapsed
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Step	Action
67.	Submitter is NOT CSOF Business Manager
	The Approval Routing for Retroactive Requests that contain <i>Federal</i> and <i>Grant</i> accounts is shown here.

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File Message	Acrobat Q Tell me what you want to do				
	121 1:30 PM oft LSUHSC <no-reply> T - ePAF 10937 - Retroactive Change in Source of Funds for John Doe submitted successfully</no-reply>				
ePAF Change in S	ource of Funds request for John Doe was submitted successfully!				ŀ
Click here to view					
Name	John Doe				
Emplid					
Retro Dates	2/1/2021 - 3/1/2021				
Action	Retroactive Change in Source of Funds				
Reason	Retro Processing				
Position					
Department					
Form ID	10844				
Submitted Dttm	5/31/2021 2:43 PM				
Submitted by					
Last updated by					
See below for any	comments related to this form:				
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Step	Action
68.	Submitters will receive the email shown here verifying the CSOF was successfully submitted.
	Click the Click here to view link.
	Click here to view
69.	The View Change in Source of Funds: Details page displays.

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Step	Action					
70.	Change in Source of Funds Approval Menu Option					
	Users can also approve the CSOF from the menu options available on the Change in Source of Funds main page.					
	Click the Approve Change Source of Funds button.					
	Approve Change Source of Funds					
71.	Enter the desired information into the Empl ID field. Enter "0000000".					
72.	Click the Search button.					
	Search					
73.	The Approve Change in Source of Funds: Details page displays.					
	Click the Down scrollbar.					

Home		LSU Chan	ge in Source of Funds	ଜ 🧔	:
John Doe Empl Rcd: 0					
View Job	Data				
report need revi	to be res				
	Please attach	a revised Time and Effort.			
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Status 1 • 2 •	Action View	Cost Transfer 🗸	Cost_Transfer.pdf	Replace	

Step	Action
74.	Personnel Action Buttons
	Comments - Sponsored Projects can enter any messages they would like to send to back to the department
	Approve - If all criteria are met, use to approve the PER and automatically send it to the next approver.
	Hold - Use to close the PER and keep it in the worklist until approved, denied or recycled.
	Recycle - Select Recycle if the department is missing a Time and Effort report, or if a question(s) does not appear to be reasonable or completed. The Recycle button will send a comment to the initiator and Recycle the retro back to the department to allow them to correct errors or attach missing documents.
	Deny - Use to reject the PER and permanently end its processing.
75.	Users would select the appropriate option from among <i>Approve</i> , <i>Hold</i> , <i>Recycle</i> and <i>Delete</i> .
	Comments should be added if the PER is Held, Recycled, or Denied.

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File Message	Acrobat Q Tell me what you want to do				
	121 1:30 PM oft LSUHSC <no-reply> T - ePAF 10937 - Action Needed - Retroactive Change in Source of Funds for John Doe</no-reply>				~
Your approval is r	equested.				A
Click here to appro	ove				
Name	John Doe				
Emplid					
Retro Dates	2/1/2021 - 3/1/2021				
Action	Retroactive Change in Source of Funds				
Reason	Retro Processing				
Position					
Department					
Form ID	10844				
Submitted Dttm	5/31/2021 2:43 PM				
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See below for any	comments related to this form:				
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Step	Action
76.	Email Approval
	The Approver will also receive an email stating his/her approval is requested. The Approver will select the " Click here to approve " link to access the PER.
	Click the Click here to approve link. Click here to approve

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PER-3 eForm	ŵ	1	:	Ø
John Doe Empl Rcd: 0 View Job Data				
Approve Change in Source of Funds : Details	F	Form ID	1084	4
Please fill out the form below on request for change in source of fund for specified employee. Funding Transfer type includes:				
 Retroactive Changes to distributions that have already been paid. Prospective Changes to existing department budget earnings distribution that will affect future pay. Change in Source of Funds				
Type Retroactive				
Retro Processing Justification				
Adhoc Notify KOC O'C K				
Retro Date Range Search				-
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Step	Action
77.	The Approve Change in Source of Funds: Details page displays. Approvers should review the PER for correctness and completeness.
	Click the Down scrollbar.
	·
78.	Personnel Action Buttons
	Comments - Sponsored Projects can enter any messages they would like to send to back to the department
	Approve - If all criteria are met, use to approve the PER and automatically send it to the next approver.
	Hold - Use to close the PER and keep it in the worklist until approved, denied or recycled.
	Recycle - Select Recycle if the department is missing a Time and Effort report, or if a question(s) does not appear to be reasonable or completed. The Recycle button will send a comment to the initiator and Recycle the retro back to the department to allow them to correct errors or attach missing documents.
	Deny - Use to reject the PER and permanently end its processing.

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			PER-3 eForm	ŵ	1	:	Ø
John Doe Empl Rcd: 0 View Job Dz report need to be revised? • Plea	Yes	evised Time and Effort.					
le Attachments Status	Action	Description \Diamond	File Name 🗘		Delete	2 row	/S
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Add	View	Time and Effort ~	Time_and_Effortrevised.pdf		Replace	;	
Comments Search Deny	Recycl	le Hold Print	Арргоче				•

Step	Action
79.	Comments should be added if the PER is Held, Recycled, or Denied.
	Click the Approve button.
	Approve

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John Doe Empl Rcd: 0 View Job Data						
Approve Change in S	Source of Funds:Results	;			Form ID	10844
You have successfully approved The eForm has been routed to th View Approval Route Transaction / Signature Log	-					2 rows
Current Date Time	Step Title	User ID	Description	Form Action	Time Elapsed	
1 05/31/2021 3:58:10PM	Initiated			Submit		
2 05/31/2021 4:39:19PM	Business Manager CSOF			Approve	41 minutes	
Print					2:40 PM	
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Step	Action
80.	The Approve Change in Source of Funds: Results page displays. The transaction path also displays at the bottom of the page.
	Click the View Approval Route button.
	View Approval Route

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Step	Action
81.	Click the Done button.
	Done

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eDAE Retroactive	Change in Funding Source request for John Doe has been completed.				-
Click here to view	<u>v</u>				
Name	John Doe				
Emplid					
Retro Dates	2/1/2021 - 3/1/2021				
Action	Retroactive Change in Funding Source				
Reason	Retro Processing				
Position					
Department					
	10844 PrcsInst 2532775				
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Submitted by					
Last updated by					
See below for any	comments related to this form:				
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Step	Action
82.	Process Instance
	A <i>Process Instance</i> has been added next to the Form ID. The Fiscal Deans and Sponsored Projects <i>approvals</i> trigger the post-processing job that posts the Retro request to the ledger. This retro job will run through all the normal retro process from Initial Calc to Final Calc.

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File Message	Acrobat Q Tell me what you want to do				
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То					~
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ePAF Retroactiv	e Change in Funding Source request for John Doe has been completed.				
Click here to vie	<u>w</u>				
Name	John Doe				
Emplic					
-	2/1/2021 - 3/1/2021				
	Retroactive Change in Funding Source				
	Retro Processing				
Position	-				
Department					
-	10844 Prcsinst 2532775				
	5/31/2021 2:43 PM				
Submitted by					
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See below for an	y comments related to this form:				
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Step	Action
83.	Notification on Final Approvals
	 The following participants will be notified once <u>all</u> approvals have been completed for a request: 1) Original Submitter 2) Principal Investigator (if available) 3) Business Manager 4) Delegated Manager (if part of approver group) 5) Sponsored Projects (if part of approver group) 6) Resident Manager (if employee is a Resident)
	Click the Click here to view link. Click here to view
84.	The View Change in Source of Funds: Details page displays.
85.	This completes <i>Enter Retroactive Change in Source of Funds</i> . End of Procedure.

Reporting

Run Queries (Manager)

Procedure

In this topic you will learn how to **Run Queries (Manager)**.

1.There are two queries that can be run using Manager Self-Service to inquire on CSOF status. Statuses can be viewed for CSOF for both Prospective and Retroact forms. The queries are:	Step	Action
 ePAF Change in Source of Funds ePAF Chg Src of Funds Pending Both will be demonstrated in this exercise. 	1.	 CSOF status. Statuses can be viewed for CSOF for both Prospective and Retroactive forms. The queries are: ePAF Change in Source of Funds ePAF Chg Src of Funds Pending

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Step	Action
2.	Click the NavBar button.
	NavBar
3.	Click the Navigator button.
	Navigator
4.	Click the Manager Self Service menu.
	Manager Self Service >
5.	Click the Queries (Manager) menu.
	Queries (Manager)

Queries (Manager) ×	+	0	- 0	×
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Manager Queries				
Query Name	onalize Find View All 🔄 🧱 First 🕢 1-4 of 4 🕢 Last			
ePAF Change in Source of Funds	Description Change in Source of Funds form that includes both Prospective and Retroactive requests.			
ePAF Chg Src of Funds Pending	Pending change in source of funds form that includes both Prospective and Retroactive requests.			
ePAF Job Status Change	Personnel Action Forms related to Job status change that includes Termination, Leave, and Retirement.			
ePAF Pending Job Status Change	Pending Personnel Action Forms related to Job status change that includes Termination, Leave, and Retirement.			
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Step	Action
6.	The ePAF Change in Source of Funds query allows users to view the status of all Prospective and Retroactive requests, regardless of their disposition.
	Click in the ePAF Change in Source of Funds field.
	ePAF Change in Source of Funds

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View Row	All Form ID	Form Status	Pend Approver	ID	Empl Record	Name	Eff Date	From Date	End Date	Acct	Descr	Reason	Dept ID	Dept Desc	Position	F
1		Executed				John Doe	05/01/2021				Prospective Change in Source of Funds	TEST				
2	10725	Executed			0	John Doe		07/01/2020	08/01/2020		Retroactive Change in Source of Funds	TEST				
3	10726	Executed			0	John Doe	05/02/2021				Prospective Change in Source of Funds	test				
4	10727	Executed			0	John Doe	05/03/2021				Prospective Change in Source of Funds	test				
5	10728	Executed			0	John Doe	05/04/2021				Prospective Change in Source of Funds	test				
6	10729	Executed			0	John Doe		01/01/2021	02/01/2021		Retroactive Change in Source of Funds	I				
7	10730	Denied			0	John Doe		02/01/2021	03/01/2021		Retroactive Change in Source of Funds	TEST				
3	10731	Denied			0	John Doe	05/05/2021				Prospective Change in Source of Funds	test				
						1-1- D		04/04/20204			Retroactive Change in					

Step	Action
7.	The list of Change in Source of Funds requests displays.
	NOTE: Click on the Form ID to view form information and Approval routes. Locate Form ID 10863
	Click the Down scrollbar.

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÷	→										C.ZZ_EPAF_CHG_S	RC_FUNDS	☆	. :
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0	10833	Saved			0	John Doe		02/01/2021	03/01/2021	Retroactive Change in Source of Funds	t			
1	10838	Executed			0	John Doe	05/15/2021			Prospective Change in Source of Funds	Test			
2	10844	Executed			0	John Doe		04/01/2021	05/01/2021	Retroactive Change in Source of Funds	Retro Processing			
3	10861	Saved			0	John Doe	06/02/2021			Prospective Change in Source of Funds	test			
4	10862	Executed			0	John Doe	06/02/2021			Prospective Change in Source of Funds	test			
5	10863	Executed			0	John Doe		04/01/2021	04/30/2021	Retroactive Change in Source of Funds	test			
6	10867	Executed			0	John Doe	05/15/2021			Prospective Change in Source of Funds	Test			- 55
7	10868	Pending	KOCONN		0	John Doe		03/01/2021	04/01/2021	Retroactive Change in Source of Funds	Retro Processing			
8	10869	Saved			0	John Doe	06/01/2021			Prospective Change in Source of Funds	mmmmmm			
9	10871	Executed			0	John Doe		01/01/2021	03/01/2021	Retroactive Change in Source of Funds	tes)
9	10871	Executed			0	John Doe		01/01/2021	03/01/2021	Source of	tes		10:52 AM	

Step	Action
8.	Click the Form ID - 10863 button.
	10863

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		PER-3 eForm		Ĺ	λ Δ	: 0
John Doe Empl Rcd: 0 View Job Data						
View Change in Source	e of Funds:Details				Form ID	10863
Change in Source of Funds						
Type Retroactive	e					
test		11				
Adhoc Notify						
Retro Date Range Search						
From Date 04/01/2021 Fiscal Year 2021	I		End Date 04/30/202	21		
Total Earnings 2250.00						
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Step	Action
9.	The View Change in Source of Funds: Details page displays.
	Click the Down scrollbar.
10.	File Attachments must be printed separate from the CSOF Form.
	Click in the View field.
	View
11.	Click the Printer button.
	e
12.	Users will select their print parameters and then click the Print button.
	For <i>training purposes only</i> , click in the Cancel button.
	Cancel
13.	Click the Close button.
	×
Step	Action
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14.	Click the Down scrollbar.

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John Doe									
Empl Rcd: 0									
View Job Data Original Value:									
New Value: test Tech Audit Details									1
Segment: FX COST QUEST	T \GEREC Field: ZZ_CT_QUEST_[2							
Audit Event		-							
** ** Fri, Jun 11 21, 05:32:26 PM	N								
	he effort expended was on the gra	ant to which y	you are requesting a cost t	ransfer	? Changed				
New Value: test Tech Audit Details									
Segment: FX_COST_QUEST Field Details: Record Tag: PA	T \GEREC Field: ZZ_CT_QUEST_(3							
Audit Event									
** Fri, Jun 11 21, 05:32:19 PM	N								
Summary Changed Original Value:									
New Value: test _Tech Audit Details									
Segment: FX_COST_EXPLN Field Details: Record Tag: PA	I GEREC Field: ZZ_CT_EXPLAN								
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		a 🐜 🛛			- 84°F	, in th	N9) -	7/7/2021	4

Step	Action
15.	Either a Prospective <u>or</u> Retro e-CSOF can printed by selecting the Print option at the bottom of the page. Click the Print button. Print
16.	Click the button to the right of the Report Name field.

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John Doe Empl Rcd: 0 View Job Data]						
Original Value: New Value: test Tech Audit Details Segment: FX_COST_QUE Field Details: Record Tag: Audit Event	ST PAGEREC Field: ZZ_CT_QUEST_D						4
** Fri, Jun 11 21, 05:32:26 How did you determine tha Original Value: New Value: test Tech Audit Details Segment: FX_COST_QUE Field Details: Record Tag.	t the effort expended was Repo Nam ST		Done at transfer? Changed				
Audit Event ** ** Fri, Jun 11 21, 05:32:19 Summary Changed Original Value: New Value: test Tech Audit Details Segment: FX_COST_EXP Field Details: Record Tag:		XLS_CSOF					
Search Next	Print						-
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Step	Action
17.	Two printing options are available. By selecting <u>PDF</u> or <u>XLS</u> , users will print a <i>summary</i> report of the <i>e-CSOF</i> for either a Prospective or Retro request.
	Click the PDF_CSOF list item.
	PDF_CSOF
18.	Click the Print button.
	Print

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≡ zzgt_csof.pdf	1/3 − 86% + 🖸 🔄 📩	
A and a second s	Report Date: 6/14/2021 12:04 PM Retroactive Change in Source of Funds #10863 for John Doe Form Status Executed Name John Doe Empl Department Position Justification test From Date 4///2021 Thru Date 4/20/2021 Fiscal Year 2021 Total Earnings 2250	
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Step	Action
19.	The Retro Change in Source of Funds for John Doe displays. Click the Print button.
20.	Select your print parameters. For <u>training purposes only</u> , click the Cancel button.
	Cancel
21.	If the request is a <u>Retro</u> , users can select the Cost_Transfer_DEMO option to print the Cost Transfer questions and answers.
	Click the Close ZZGT_CSOF.pdf tab.
	×
22.	Click the button to the right of the Report Name field.
	✓

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John Doe Empl Rcd: 0 View Job Data Original Value: New Value: test							•
Tech Audit Details Segment: FX_COST_QUEST Field Details: Record Tag: PAGERE Audit Event							
** Fri, Jun 11 21, 05:32:26 PM How did you determine that the effo Original Value: New Value: test Tech Audit Details Segment: FX_COST_QUEST Field Details: Record Tag: PAGERE	Report Name	Approval PDF_CSOF PDF_CSOF	Done st transi	fer? Changed			
Audit Event ** Fri, Jun 11 21, 05:32:19 PM Summary Changed Original Value: New Value: test Tech Audit Details Tech Audit Details Segment: FX_COST_EXPLN Field Details. Record Taq: PAGERE	C Field: ZZ CT EXPLAN	XLS_CSOF					
Search Next Print							*
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Step	Action
23.	Users can also have their print display in Excel format by selecting the XLS_CSOF option. Click the XLS_CSOF list item.
24.	Click in the Print field. Print

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8 Name	John Doe										
9 Empl											
10 Department											
11 Position											
12											
13 Justification	test										
14 15 From Date	4/1/2021										
15 From Date 16 Thru Date	4/1/2021 4/30/2021										
17 Fiscal Year	2021										
18 Total Earnings	2,250.00										
19	2,250.00										
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21 Selected Combo Code	Description	Earnings	Percent	Deptid	Project F	ederal Gi	ant				
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Step	Action
25.	The Retro CSOF displays.
	Click the File tab.
26.	Click the File Tab button.
	File
27.	Click the Print menu.
	Print
28.	For training purposes only, click the Close button.
	\times
29.	Click the Done button.
	Done
30.	Click the Next button.
	Next

Step	Action					
31.	The View Change in Source of Funds: Results page displays.					
	Users can click the <i>View Approval Route</i> to determine what approvals have been received, if any. If the page is blank, all approvals have been received.					
32.	This CSOF has been <i>Executed</i> , so all Approvals have been received.					
	Click the Signature/Action Logs button.					
	Signature/Action Logs					



Step	Action
33.	Click the Close tab.
	×
34.	Click the Close Query tab.
	×

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Query Name	Description	
ePAF Change in Source of Funds	Change in Source of Funds form that includes both Prospective and Retroactive requests.	
ePAF Chg Src of Funds Pending	Pending change in source of funds form that includes both Prospective and Retroactive requests.	
ePAF Job Status Change	Personnel Action Forms related to Job status change that includes Termination, Leave, and Retirement.	
ePAF Pending Job Status Change	Pending Personnel Action Forms related to Job status change that includes Termination, Leave, and Retirement.	
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Step	Action
35.	The ePAF Chg Src of Funds Pending will display the status of both Prospective and Retroactive requests as well. However, users will only see Pending, Saved or In Error requests.
	Click in the ePAF Chg Src of Funds Pending field. ePAF Chg Src of Funds Pending

-	_	_CHG_	SRC_FU	NDS_P	ENDIN	G- ePAF	Chg Src	of Funds	Pending								
View Row	Form	Form Status	Pend Approver	ID	Empl Record	Name	Eff Date	From Date	End Date	Acct	Descr	Reason	Dept ID	Dept Desc	Position	Posn Desc	
1		Pending		0014005		John Doe		10/01/2020	10/31/2020		Retroactive Change in Source of Funds	test					
2	10806	Saved		5030295	0	John Doe		01/01/2021	02/01/2021		Retroactive Change in Source of Funds	test					
3	10808	Saved		5030295	0	John Doe		01/01/2021	02/01/2021		Retroactive Change in Source of Funds	TEST					
4	10833	Saved		5030295	0	John Doe		02/01/2021	03/01/2021		Retroactive Change in Source of Funds	t					
5	10861	Saved		5030295	0	John Doe	06/02/2021				Prospective Change in Source of Funds	test					
6	10869	Saved		5030295	0	John Doe	06/01/2021				Prospective Change in Source of Funds	mmmmmmm					
7	10872	Saved		5030295	0	John Doe		04/01/2021	04/30/2021		Retroactive Change in Source of Funds	test					
8	10873	Saved		5030295	0	John Doe		01/01/2021	01/31/2021		Retroactive Change in Source of Funds	0000000					
9	10880	Pending		0137980	0	John Doe	06/01/2021				Prospective Change in Source of Funds	t					

Step	Action
36.	The list of Pending/Saved Change in Source of Funds requests display.
	Click the Form ID 10868 button.
	10768
37.	The View Change in Source of Funds: Details displays.
	Click the Down scrollbar.
	▼

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2 158131005A-501000		400.00 5.385000 50100	0				No
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Step	Action
38.	Either a Prospective <u>or</u> Retro e-CSOF can printed by selecting the Print option at the bottom of the page. Click in the Print field. Print
39.	Click the Report Name dropdown button to activate the menu.

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2 158131005A-501000		400.00 5.385000 501000 Cancel Approval	Done		No 1 row
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Step	Action
40.	Two printing options are available. By selecting <u>PDF</u> or <u>XLS</u> , users will print a <i>summary</i> report of the <i>e-CSOF</i> for either a Prospective or Retro request.
	NOTE: If it is a Retro request, the Cost Transfer information will also display for printing.
	Click the PDF_CSOF list item.
	PDF_CSOF
41.	Click the Print button.
	Print

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≡ zzgt_csof.pdf	1/1 - 86% + 🕻 🔿 🕹 🖶 :
	Report Date: 7772021 17:25 PM Retroactive Change in Source of Funds #10768 for John Doe
	Form Status Recycled Name John Doe Empl Department
	Position Justification test From Date 10/1/2020
	Thru Date 10/3/2020 Fiscal Year 2021 Total Earnings 7,427,93
	Brancia Control Code Description Emergin Person Duplif Project Fabrical General Y 7 7427.83 500.000 N N N N
	New Change in Source of Funds Construction Exemption 0681310001-501000 0 981310054.501000 400.00 460.00 5.565
	CSOF #10768 Summary Original Distributions New Distributions Combo Code Earnings Percent
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Step	Action
42.	The Retro Change in Source of Funds for John Doe displays.
	<i>NOTE: Users can print the report by clicking the Print icon located at the top right corner of the page.</i>
	Click the Close ZZGT_CSOF.pdf tab.
	×
43.	Click the Done button.
44.	Click the Close ePAF Custom Form Component tab.
45.	Click the Close Query tab.
46.	This completes <i>Run Queries (Manager)</i> . End of Procedure.

Run BI Publisher HR Journal Details by Date Rng Report in FIN RPT

Procedure

In this topic you will learn how to **Run BI Publisher HR Journal Details by Date Rng Report** in Fin RPT.

NOTE: The FIN Reports (RPT) database is one day behind Production.

Step	Action
1.	Users can check the FIN Reports (RPT) system to see if their Change in Source of Funds (CSOF) request has been posted to the ledger. Two BI Publisher reports have been written to obtain Journal Details regarding CSOF requests:
	 ZZGLX067 – HR Journal Details by Date Rng ZZGLX068 – HR Adjustment Jrnl Dtl
	In this exercise, you will run the HR Journal Details by Date Rng Report.

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Step	Action						
2.	Click the NavBar button.						
	NavBar						
3.	Click the Navigator menu.						
	Navigator						
4.	Click the Reporting Tools menu.						
	Reporting Tools >						
5.	Click the BI Publisher menu.						
	BI Publisher >						

Step	Action
6.	Click the Query Report Viewer list item.
	Query Report Viewer

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Step	Action					
7.	Enter the desired information into the field. Enter "ZZGLX06".					
8.	Click the Search button.					
	Search					

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ZGLAUGU	EE ID TransDetail Expenses	Query	ZZBIP_SHR_TRANS_DTL_EE_ID		✓ N	view Report			
ZGLX061	Summary	Query	ZZBIP_TRANSDTL_ACCTPER_EXP	PDF	✓ N	View Report			
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Step	Action							
9.	Select the ZZGLX067 report.							
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Step	Action
10.	You must enter a <i>Beginning Date</i> , <i>Ending Date</i> and <i>GL Unit</i> at <u>minimum</u> to run the report. To focus your results, remove the '%' and add a <i>Department</i> number, <i>Project</i> number, <i>Empl ID</i> , etc. All <u>fields must</u> have a <u>value</u> or a <u>'%'</u> in order for the report to successfully run.
11.	For this exercise, the following parameters will be added:
	• Project – 122530011A
	• Beginning Date – 05/01/21
	• Ending Date – 06/01/21
	• GL Unit - LSUNO

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Step	Action
12.	Enter the desired information into the Project: field. Enter "122530011A".
13.	Enter the desired information into the Beginning Date: field. Enter "050121".
14.	Enter the desired information into the Ending Date: field. Enter "060121".
15.	Enter the desired information into the GL Unit: field. Enter "LSUNO".

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Step	Action
16.	Click the OK button.
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Step	Action
17.	If you are returned to the <i>Query Report Viewer</i> page <u>without</u> your <u>results</u> displaying, check your browser for a Pop-up Blocker message. Click the Pop-up blocked button.

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Step	Action								
18.	Select the option to allow for pop-ups.								
	Click the Always allow pop-ups and redirects from https://prd.psfs.lsuhsc.edu option.								
	O Always allow pop-ups and redirects from https:// prd.psfs.lsuhsc.edu								
19.	Click the Done button.								
	Done								
20.	Users must start from the beginning and resubmit the report.								
	Click in the View Report field.								

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Step	Action
21.	Enter the desired information into the Project: field. Enter "122530011A".
22.	Enter the desired information into the Beginning Date: field. Enter "050121".
23.	Enter the desired information into the Ending Date: field. Enter "060121".
24.	Enter the desired information into the GL Unit: field. Enter "LSUNO".

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Step	Action
25.	Click the OK button.
26.	Your report displays. Use the Zoom In button to enlarge results. For this exercise, enlarge your view to 100%. Click the Zoom In button.



Step	Action
27.	Click the Right scrollbar to view additional information.

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Step	Action
28.	Click the Left scrollbar.
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Step	Action
29.	Users can print the report by clicking the Print button on the page toolbar.
	Click the Close HR_Journal_Details_by_Date_Range tab.
	×
30.	Click the Home button.
	A Home
31.	This completes <i>Run BI Publisher HR Journal Details by Date Rng Report</i> . End of Procedure.

Run BI Publisher HR Adjustment Jrnl Dtl Report in FIN RPT

Procedure

In this topic you will learn how to **Run BI Publisher HR Adjustment Jrnl Dtl Report in FIN RPT**.

NOTE: The FIN Reports (RPT) database is one day behind Production.

Step	Action
1.	 Users can check the FIN Reports (RPT) system to see if their Change in Source of Funds (CSOF) request has been posted to the ledger. Two BI Publisher reports have been written to obtain Journal Details regarding CSOF requests: ZZGLX067 – HR Journal Details by Date Rng ZZGLX068 – HR Adjustment Jrnl Dtl
	In this exercise, you will run the HR Adjustment Jrnl Dtl Report.

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Step	Action					
2.	Click the NavBar button.					
	NavBar					
3.	Click the Navigator menu.					
	Navigator					
4.	Click the Reporting Tools menu.					
	Reporting Tools >					
5.	Click the BI Publisher menu.					
	BI Publisher >					



Step	Action
6.	Click the Query Report Viewer list item.
	Query Report Viewer

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Step	Action			
7.	Enter the desired information into the Search by field. Enter "ZZGLX06".			
8.	Click the Search button.			
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Step	Action
9.	Select the ZZGLX068 report.
	Click the View Report link. View Report

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Step	Action
10.	You must enter a <i>Beginning Date</i> , <i>Ending Date</i> and <i>GL Unit</i> at <u>minimum</u> to run the report. To focus your results, remove the '%' and add a <i>Department</i> number, <i>Project</i> number, <i>EmplID</i> , etc. All <u>fields must</u> have a <u>value</u> or a ' <u>%'</u> in order for the report to successfully run.
11.	For this exercise, the following parameters will be added: • Project – 158050024A • Beginning Date – 04/01/21 • Ending Date – 06/01/21 • GL Unit - LSUNO

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Step	Action
12.	The Department number or EmplID could be used instead of Project as a parameter.
	Enter the desired information into the Project: field. Enter "158050024A".
13.	Enter the desired information into the Beginning Date: field. Enter "040121".
14.	Enter the desired information into the Ending Date: field. Enter "060121".
15.	Enter the desired information into the GL Unit: field. Enter "LSUNO".

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Step	Action
16.	Click the OK button.
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Step	Action
17.	Your report displays. Use the <i>Zoom In</i> button to enlarge results. For this exercise, enlarge your view to 100%. Click the Zoom In button.

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Step	Action
18.	Click the Right scrollbar to view additional information.

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Step	Action
19.	Click the Left scrollbar.
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Step	Action
20.	Users can print the report by clicking the Print button on the page toolbar.
	Click the Close HR_Adjustment_Journal_Details tab.
21.	This completes <i>Run BI Publisher HR Adjustment Jrnl Dtl Report in FIN RPT</i> . End of Procedure.