

Note: If at anytime you make an error in the cost distribution, you can click on **reset plan** and this will take you back to the original active plan.

Log into CDEM via MyUK, Enterprise Services

- 1. Search for employee by typing in partial last name, Person ID, etc. and click on name to open Control Record.
- 2. Be sure you are in an "Active" plan

\sim	 Commitments (2) 									
	Curr/F	ut Dist?	Val Stat	Со Туре	Cost Object	Cost Obje				
₹		×		CC	1012813200	HRS BUD				
₫	<u>m</u>	×		WBS	3049026102	KY HORT				
		-								
		Version:		Validation S	tatus: Okay	Ea				
	In-prog	Version: gress Ac	tive	Validation S Workflow St	tatus: Okay tatus: 70 Active	Ea e AV				

3. Click on > button to the left of Commitments to view the account numbers. If the account number is not listed, then you will need to add a <u>new commitment</u>.



To add a commitment, click on green icon (right side of screen).

> Commitments (3)	▼ Filter



A pop-up Box will appear. From the <u>Select type</u> drop down menu select either (CC (cost center) or WBS (grant), type in the account number and click <Check>.

			Initiate Workflow	pprove Plan Return to	Plan Entry	R
	Add a Commitment				×	
		1 Choose & Check Cost Object	2 Er	nter Percentage	-	•
	Select Type	 Enter Cost Object 	Check			
essa					/ .	Ţ
	4			*	•	1
-9				Enter Percentage	Cancel	

Click the *Notify when budget period is extended* box (optional) and enter the percentage of time, add notes (optional) and click **<save>.**

	Chas	an & Charle		
	Choc	Object	2 Enter Percentage	
CO Type: Wi	BS	Cost Object:	2353006000	
Name: AF	S HATCH RESE	ARCH FUNDS	Valid: 2005-10-01 to 2031-09-30	
iter Perce	ent distribu	Ition by fund:	Notes	
iter Perce	ent distribu	Ition by fund: Percentage	Notes	
- The second sec	Fund Type	Percentage	Notes Enter notes (optional)	
anter Perce	Fund Type	Percentage	Notes Enter notes (optional)	

5. Click on the **<Create New Plan>** button

Plan Detail (Active) Version: Validation Status: Okay Earliest Retro: 10-01-2019 Plan Created: 03-01-2021 by DGAGEL Plan Id: 000200002295 In-progress Active Workflow Status: 70 Active AVC Check: NIA AVC Check: NIA Last Changed: 03-01-2021 by DGAGEL Plan Source: CONV Conversion	U	istributions Alerts Plan	History								
Version: Validation Status: Okay Earliest Retro: 10-01-2019 Plan Created: 03-01-2021 by DGAGEL Plan Id: 00020002295 In-progress Active Workflow Status: 70 Active AVC Check: N/A Last Changed: 03-01-2021 by DGAGEL Plan Id: 000200002295 In-progress Active Workflow Status: 70 Active AVC Check: N/A Last Changed: 03-01-2021 by DGAGEL Plan Source: CONV Conversion Applicable Conversion Conversion Conversion Conversion	~	Plan Detail (Active)									Create New Plan
In-progress Active Workflow Status: 70 Active AVC Check: NA Not AVC Check: N/A Last Changed: 03-01-2021 by DGAGEL Plan Source: CONV Applicable Conversion		Version:	Validation Status: Okay	Earliest Retro:	10-01-2019			Plan Created:	03-01-2021 by DGAGEL	Plan ld:	000200002295
		In-progress Active	Workflow Status: 70 Active	AVC Check:	NA Not Applicable	AVC Check:	N/A	Last Changed:	03-01-2021 by DGAGEL	Plan Source:	CONV Conversion

Note: The version changes to "In-Progress"



6. Click on the green icon under *Effective Period View* to Create a new effective period.

Distributions Alerts	Plan History						
 Plan Detail (In-Progr 	ess)	NOTE: THIS IS NOW AN IN-PR	OGRESS PLAN	Initiate Workflow Approve Plan F			
Version:	Validation En	Earliest Retro:	01-01-2021		Plan Created: 03-08-2021 t		
In-progress Active	Workflow 10	Plan Entry AVC Check:	NA Not	AVC Check: N/A	Last Changed: 03-08-2021 t		
Prior Active	Plan Notes:		Аррисаріе		Activated N/A Date:		
Effective Period View	Validation Message	s AVC Check Wo	rkflow History	Cost Object View Ma	atrix View		
Eff. Periods (0)	1	Select an Ef	fective Per	riod.			
Val Stat	Effective Periods	View a list of distr	ibutions for an	effective period by selecting	from the effective period list.		

A pop-up box will appear, add start date, and end date and click <Create Effective Period>.

EIIU			Plan Created. 03-06-2021 by CAJO224
Crea	ate an Effective Period		×
	Start Date: 03/01/2021	End Date: 03/31/2021	
ssàrres	AVU CRECK VVORBOW HISTO	IV COSTODIECEVIEW MAT	Create Effective Period
ssages	AVC Check VVorkilow Histo	ry Cost Object view iviat	FIX VIEW

7. Click on the View Detail icon to update the distribution.

Г	Effe	ctive	Perio	od View	Validation Messages			
	Eff.	Pe	erio	ds (1)				
/				Val Stat	Effective Periods			
Ð	Ð	Ø	Ŵ	8	03-01- 03-31- 2021 2021			

8. Click on the *<***Update Distribution***>* button.



Last updated: 3/10/2021



9. Click on the <+ Add Cost Object> button.



10. Add the account numbers under the Cost Object field—when you start typing the number, you need to select one of the options (do just type in the whole number and hit enter - if you do this, the cost object description will not pre-populate), enter your SIO (if applicable), enter the percentages, and click on **<Save Changes>**.



- 11. Check if there are any validation messages, if you receive a message that says future cost distributions do not add up to 100%, click on the + Add 1018 button. This will force CDEM to default to the 1018 distribution when a grant ends and will remove the error message.
- 12. Click on the AVC check, and Initiate workflow

Distributions Alerts Plan Detail (In-Progress)	an History					4 Initiate Wo	rkflow Approve Plan Retur	n to Plan Entry Reset	t Plan Consolidate Plan	Delete Plan
Version:	Validation Status: Warning	Earliest Retro:	01-01-2021			Plan Created:	03-10-2021 by CAJO224	Plan Id:	000200006497	
In-progress Active	Workflow Status: 10 Plan Ent	ry AVC Check:	NA Not	AVC Check:	N/A	Last Changed:	03-10-2021 by CAJO224	Plan Source:	DEPT	
Prior Active	Plan Notes:		Applicable			Activated Date:	N/A		Department	
$/ \setminus$	2 3									
Effective Period View Valid	fation Messages AVC Check	Workflow History	Cost Object View	Matrix View						
Eff. Periods (1) Select an Effective Period.										
Val Stat	Effective Periods	view a list of distributi	ons for an effective	period by selectin	g from the effe	ctive period list.				

13. A pop up box appears, you can enter notes (optional), click on initiate



14. Review your work, and if correct, click on Approve Plan

Distributions Alerts Plan History V Plan Detail (In-Progress)									to Plan Entry Rese	et Plan
Version:	Validation Status:	Warning	Earliest Retro:	01-01-2021			Plan Created:	03-10-2021 by CAJO224	Plan Id:	000
In-progress Active	Workflow Status:	30 Pending	AVC Check:	NA Not	AVC Check:	N/A	Last Changed:	03-10-2021 by CAJO224	Plan Source:	DEF
Prior Active	Plan Notes:	Approval Ø		Applicable			Activated Date:	N/A		Dep

A pop up box will appear. Enter notes (optional) and click on **approve.**

You will see a message that says *Pending SAP Posting*. Once it posts to SAP, the plan will change to "Active".