PDC WORKFLOW TRAINING DOCUMENT

MAY 17, 2019

NORTHEASTERN UNIVERSITY

Contents

What’s the Payroll Distribution Change (PDC) system

The purpose of this document is to be a reference manual providing detailed information to support the process of creating, approving/rejecting, and viewing the payroll distribution change requests.

Improved Features

The following improvements are implemented in the new version of the PDC system:

1. Auto populate position number for the Employee selected
2. Only valid and active indexes can be part of the request
3. Index and Account description are displayed for the account and the index used in the request
4. List of reasons to select for when a request is raised
5. Enter comments to justifying if the Change From date is less than the request date
6. Allow multiple approvers for a request
7. Allow HR to mark the request as complete
8. Receive notifications on various activities in the system
9. Dashboard for requestors to view visibility on the request status
10. Reports for HR users on various parameters

How to log into the system?

Step 1: Visit the web link for the PDC request page
Step 2: Enter your credentials
Step 3: Successfully sign in to view Home Screen

Walkthrough

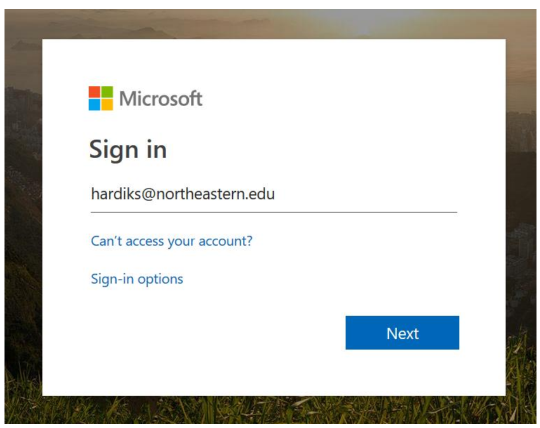
Step 1: Visit the web link for the PDC request page

a. Use the following link to view the PDC request landing page.
https://k2forms.northeastern.edu/Runtime/Runtime/Form/PDC+-+My+Requests/?

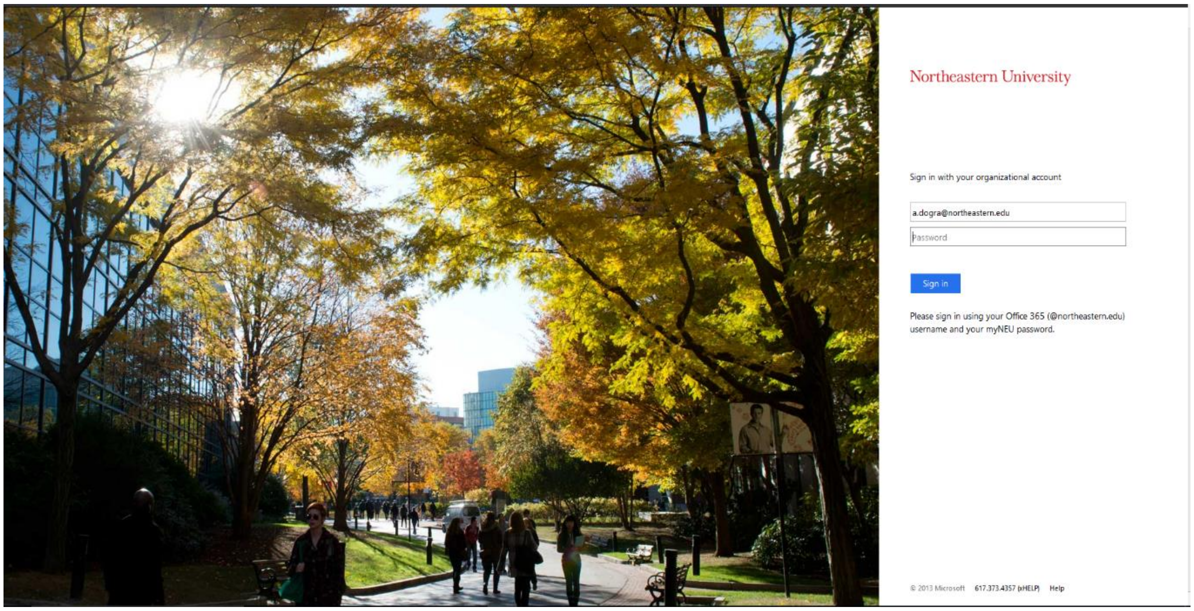
Note: The system is best compatible for use on the latest Firefox, Chrome, Edge or Safari browsers. The system is not responsive on mobile / tablet screens.

Step 2: Enter your credentials

a. Log in to the system using *your-username@northeastern.edu* as shown in the screenshot below, and click on the **Next** button:

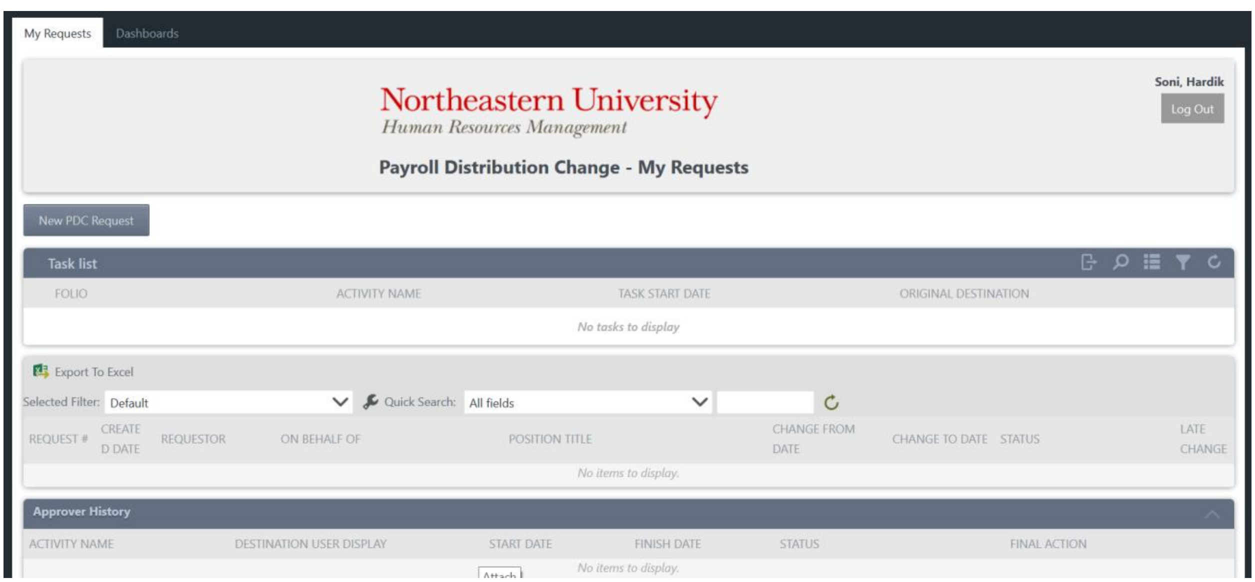


b. You will be redirected to the Northeastern University Organizational Account sign in page, enter your credentials and click on the **Sign in** button.



Step 3: Successfully sign in to view Home Screen

c. Once you are logged in you will be redirected to the Home screen of the Payroll Distribution Change system.



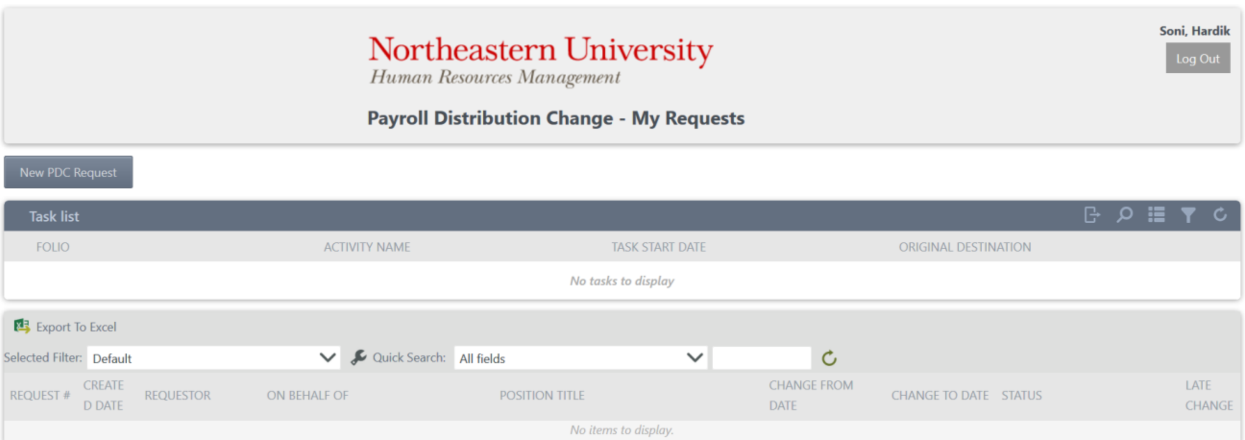
How to create a new Payroll Distribution Change (PDC) Request?

Step 1: Click on the New PDC Request button
Step 2: Enter General Information of requestor
Step 3: Review Current Earnings Distribution
Step 4: Modify the Earnings Distribution
Step 5: Select the Approver(s)
Step 6: Submit Request

Walkthrough

Step 1: Click on the New PDC Request button

a. Once logged in, click on the **New PDC Request** button on the Home screen.



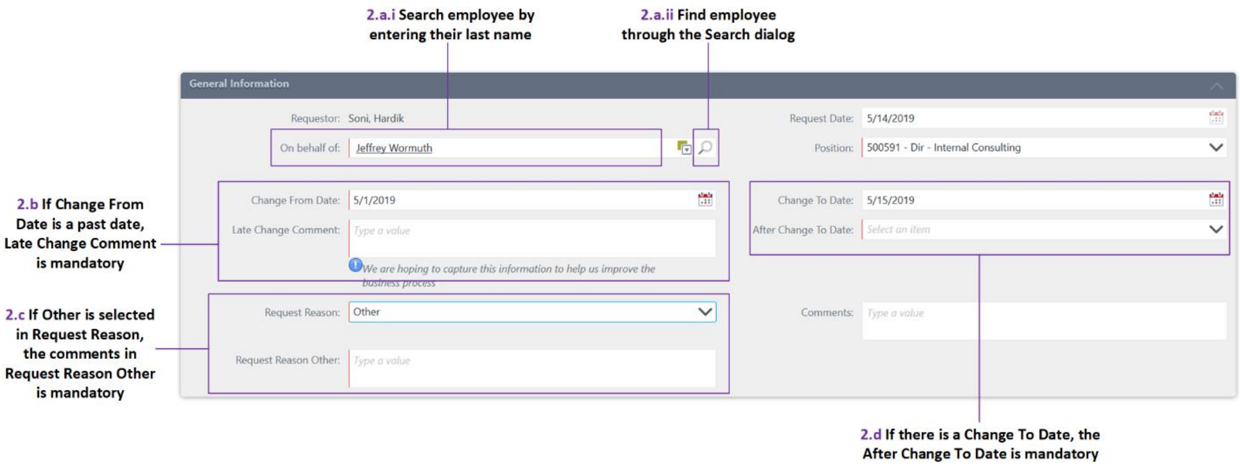
Step 2: Enter General Information of requestor

In the **General Information** section, enter the following details:

a. Full Name: This is the Employee name field for whom you are raising a request.
    i. Enter the last name and hit enter.
    ii. Or click on the magnifier icon to search in the Search dialog box.
    iii. The **Position** field will be auto filled after selecting the employee. If the employee list is populated, select the position number from the prepopulated list.

b. Change From Date: Set the date from when the change should be applied using the **Change From Date** field. If the from date selected is a past date, the requestor will have to enter a comment in the **Late Change Comment** field mandatorily.

c. Request Reason: Select the reason for creating the request using the **Request Reason** picklist. If the Other option is selected, the requestor will have to enter a comment in the **Request Reason Other** field mandatorily.



d. Change To Date: If the user selects the end date for the change using the **Change To Date** field, the requestor will have to select the change to be made after the selected to date using the **After Change To Date** field.

Step 3: Review Current Earnings Distribution

In the **Current Earnings Distribution** section, the employee's current earnings distribution is shown with Index details along with the Account (i.e. billed for the Index) and Percent amount billed.

Current Earnings Distributions

INDEX	ACCOUNT	PERCENT
221110 - Internal Consulting	61130 - Salary-Professional	100.00
Total		**100.00**

Step 4: Modify the Earnings Distribution

a. In the **Change in Earnings Distribution** section, click on the Add button to add a new change.
   i. Select the desired Index by entering either the Index name or Index code.
   ii. Select the desired Account by entering either the Account name or Account code.
   iii. Enter the percent value in the Percent field.

Change in Earnings Distributions

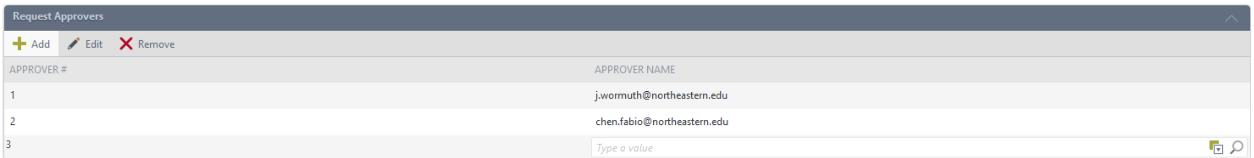
Add | Edit | Delete

INDEX	ACCOUNT	PERCENT	GRANT TYPE
685210 - DeSanctis Marine Scienc	61210 - Salary-	100.00 %	N
Total		**100.00 %**	

b. Select the individual split line item and click on the Edit button to edit the individual line item.
c. Select the individual split line item and click on the Delete button to delete the individual line item.

Step 5: Select the Approver(s)

a. In the Request Approvers section, click on the Add button to add an approver to the list.
   i. For each of the approvers, search by entering the approver name in the Approver Name section.



b. Select the individual split line item and click on the Edit button to edit an approver.
c. Select the individual split line item and click on the Delete button to delete an approver.

Step 6: Submit Request

a. Skim through the entire form and click on the **Submit** button in the bottom-right corner to submit the request.
b. Click on the **Exit** button to cancel the PDC creation process.

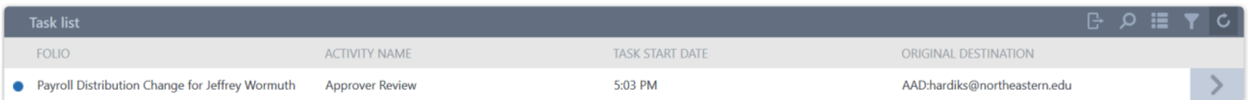
How to Approve/Reject the Payroll Distribution Change (PDC) Request?

Step 1: Open Request from the Task List section
Step 2: Approve/Reject the request with relevant comments

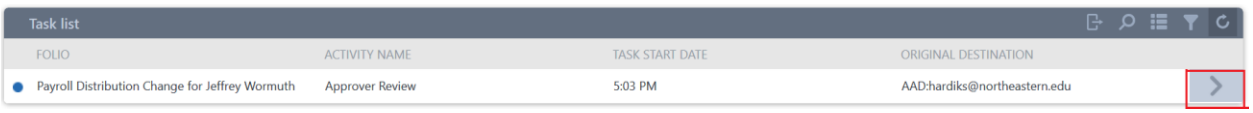
Walkthrough

Step 1: Open Request from the Task List section

a. Double-click on the request in the **Task List** section on the Home screen to view the list of the request waiting for your approval.



b. Alternatively, single-click on the arrow located on the right side of the line item to pull up a menu and select **Open Form** to view the request waiting for approval.



Step 2: Approve/Reject the request with relevant comments

a. Click on the **Approve** or **Reject** buttons in the bottom right to approve / reject the request.
b. Comments in the **Approval / Rejection Comment** field are mandatory when you reject a request.
c. Click on the **Exit** button to cancel the PDC Approval / Rejection process.

Note: This section is for Approvers (users who were added as approvers by the requestors) and Research Compliance, and HR team

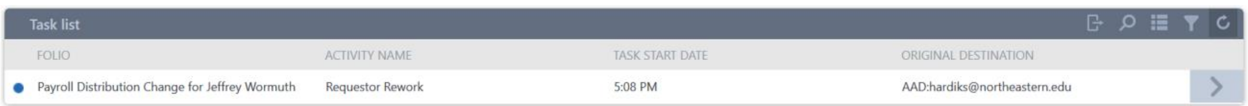
How to Resubmit a Rejected Request?

Step 1: Open Request from the Task List section
Step 2: Review the Rejection comments made by Approver
Step 3: Make changes to the Request and Resubmit

Walkthrough

Step 1: Open Request from the Task List section

a. Double-click on the request in the **Task List** section on the Home screen to reedit the rejected request.



Step 2: Review the Rejection comments made by Approver

a. The requests will contain the title **Requestor Rework**, open the request to view its details and rejection comments made by the approver.

Step 3: Make changes to the Request and Resubmit

a. Make changes as per the comments by the approver and resubmit the request by clicking on the **Submit** button the bottom-right corner of the screen.

How to Track the Payroll Distribution Change (PDC) Request?

Step 1: Select any Request you want to track
Step 2: View Status of the Request
Step 3: View additional details of Request

Walkthrough

Step 1: Select any Request you want to track

a. The following section on the home screen will showcase all the requests that you have raised

Export To Excel

Selected Filter: Default Quick Search: All fields

REQUEST #	CREATED DATE	REQUESTOR	ON BEHALF OF	POSITION TITLE	CHANGE FROM DATE	CHANGE TO DATE	STATUS	LATE CHANGE
48	5/14/2019	Soni, Hardik	Jeffrey Wormuth (000166972)	Dir - Internal Consulting	5/14/2019		Requestor Change Requested	No

b. You could do a search by selecting any of the parameters listed in the **Quick Search** field (Request #, Requestor, On Behalf Of (Employee Name), Change From date, Change To date, Status, Late Change (Yes/No), Position Title).

Step 2: View status of Request

a. Single click on any of the request from the previous step would showcase the approval history for that particular request in the **Approver History** section.
b. The raised request will have to undergo the following reviews before it is approved:
   i. Approver Review – The form must be approved by the Approver(s) selected while raising the PDC request.
   ii. Research Compliance – For Research related transfers, the PDC request form undergoes an additional review by the Research Compliance Team.
   iii. HR Processing – This is the final step before your PDC request can be approved.

Approver History

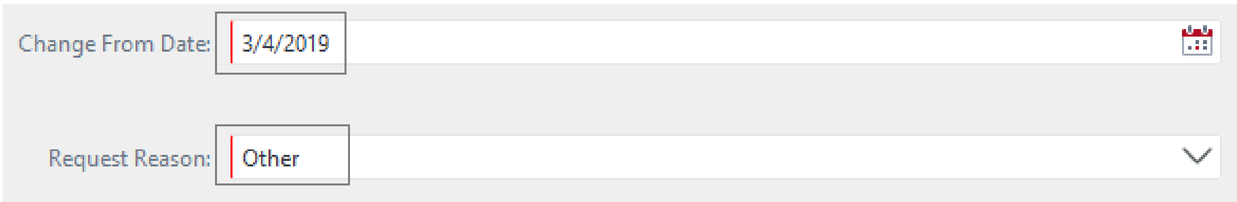
ACTIVITY NAME	DESTINATION USER DISPLAY	START DATE	FINISH DATE	STATUS	FINAL ACTION
Approver Review	Soni, Hardik	5/14/2019	5/14/2019	Completed	Rework
Requestor Rework	Soni, Hardik	5/14/2019	5/14/2019	Completed	Cancel

Step 3: View additional details of Request

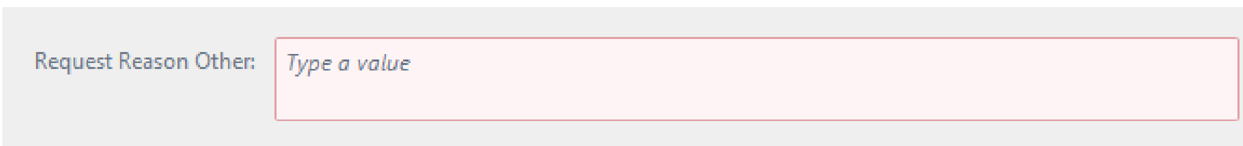
a. Double click on any of the requests to view its details.
b. Click on the **Export to Excel** button to export the displayed list into an Excel file.

Points to Remember

a. The fields highlighted with a Red line on the left border (as shown below) are the mandatory fields.



b. All the validations on the fields are highlighted in red as shown below when you try to submit the request.



c. For various actions in the event the following person are notified:

Email Recipient	Event
Requestor	1. When a request is submitted 2. When the request is rejected 3. When the request is processed by the HR
Approver	1. When a request is submitted by the requestor and your name is added as one of the approvers
Research Compliance	1. When the request is approved by the intended approvers and is now awaiting Research Compliance approval.
HR	1. When the request is approved by the Research Compliance team and is awaiting for the HR to Approve or Reject the request.