# Creating a PDA in Oracle – Hands On Training Quick Guide

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IMPORTANT: For PDA training sessions, please confirm that you are using the Oracle YPROD practice instance.

- The URL in your browser should show ebsyprod
  https://ebsyprod.andrew.cmu.edu/OA_HTML/OA.jsp?OAFunc=OAHOMEPAGE
- The color of the launched Oracle form should be brownish (as shown in steps below)
  - **STOP** if your forms are blue as that means you are in the production (real) instance of Oracle.

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1) From the Oracle home page or on the Internal Navigator (both shown below), open the **USA LD Payroll Distribution Adjustments** responsibility folder and then choose **CMU Distribution Adjustments**.
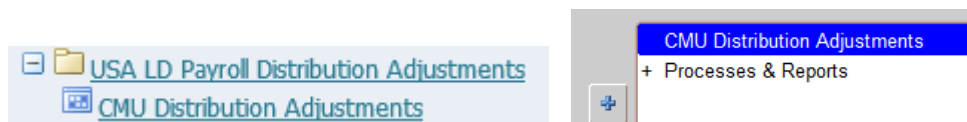
2) The **Find Distributions** window opens (as shown below).

   a) Type **your name** into the Employee Name field: LAST, FIRST. Alternatively, click the **List of Values** button to search for your name, which may take a minute to verify.

   b) The **Assignment** will open a window after your name is entered. Select the first Assignment Number from the list.

   - Enter the **Begin** and **End Dates** of the latest payroll period for the selected employee: dd-MON-yyyy.

   c) Always change the **Adjust by** radio button to **Element**, which is the narrowest search for the payroll adjustments. Make sure to mouse click the Element radio button. **Do not use the up and down arrow keys to make the selection.**

d) Click the **Find** button to search for any distributions based on the criteria entered.

3) The **Distribution Adjustments** window opens (as shown below).

a) The **Employee**, **Assignment** and **Distribution Period** sections are system populated based on the search criteria information entered in the **Find Distributions** screen shown above.

b) The **Actual Distributions** section shows distributions that have been made.

i) Find the distribution(s) that needs adjusted and click the **Transfer** check box next to it (shown above).

ii) Click the **Done** button to transfer the selected distribution to the **Adjusted Distributions** section.

- **Note:** Multiple lines can be transferred at the same time, but they must have the same element type.

c) The selected distribution now displays in the **Adjusted Distributions** section.

i) Click into the line below and enter the General Ledger (GL) account or Project Task Award (PTA) account information in the appropriate columns.

- **Note:** There can be multiple distributions for one amount. The total must net to zero before you can freeze the set and submit the PDA.

d) Select the **Amount** or **Percent** radio button in the Adjust By section.

e) Enter in the Amount or Percentage (%) of the PDA in the appropriate column.

f) To forward the PDA to someone outside of the approval path, select the **Designated Flex Field (DFF)** [image] for the adjustment on the right-hand side of the Adjusted Distributions section.

g) The **Adjustment Distributions Information** window opens.

i) The Forward To field allows the PDA to be forwarded to any active university employee.

- **Notes:**
    - The PDA approver(s) do not need to be listed here as they will automatically receive the PDA for approval once it is submitted.
    - Principle Investigators (PI) can be added in the Forward To field to be added to the workflow. SPA will accept this as a PI approval.
        (i) The PI approval would come after the Oracle Supervisor and Administrative Leadership Group (ALG) members following the approval workflow.
    - If a person is added to the Forward To field and they are already part of the workflow, they will only need to approve the PDA one time.
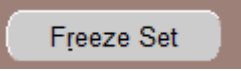   - The Forward To should only be entered on the first debit line of the adjustment.

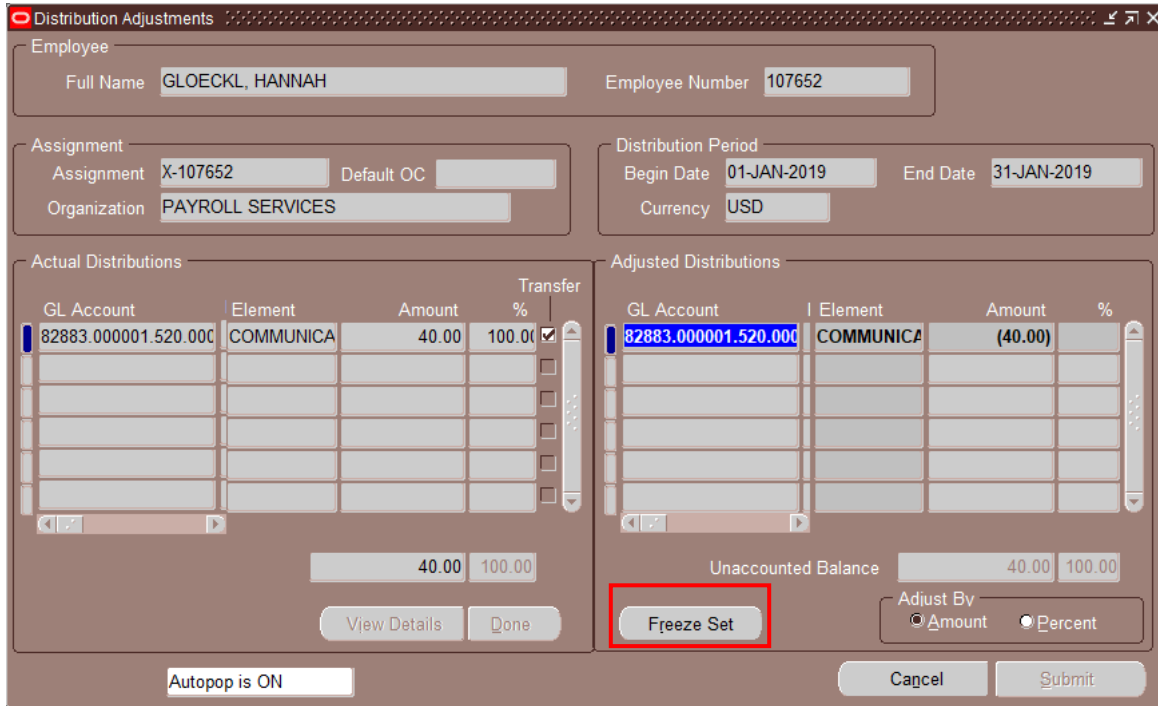ii) Click the List of Values button to select a **Reason Code** that corresponds to your PDA.

(a) Change in effort reported after deadline
(b) Correcting suspense – object code not available
(c) Correcting suspense – unknown reason
(d) Incorrect Object Code populated
(e) Incorrect charging string in Workday
(f) Incorrect costing allocation setup
(g) Incorrect labor schedule setup
(h) Missing costing allocation
(i) Missing labor schedule
(j) Retro costing allocation changes
(k) Work Study percentage corrections
(l) Other & Comments

(i) **Note:** An additional window will open after the PDA is submitted to add comments.

iii) Click the **OK** button when finished.

Submitting the PDA

1) From the Distribution Adjustments window, click the **Freeze Set** button when finished entering the adjusted distributions information. The Submit button will not be active until this button is clicked.

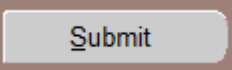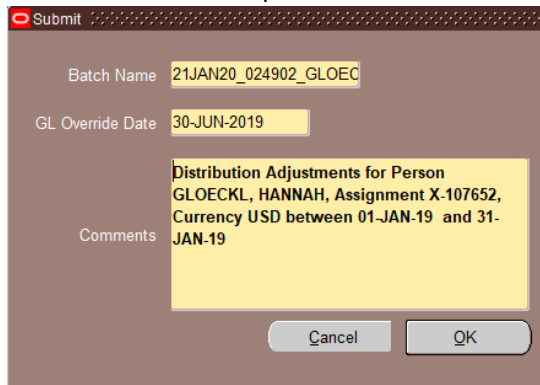2) Select the **Submit** button once it is active to send the PDA for approval.

3) The **Submit** window opens to allow for Comments.

a) Don't change or delete the **Batch Name** as it is a unique item key.

b) The **GL Override Date** must be entered as the **current date**: dd-MON-yyyy.

- **Note:** If this date is not in the current open accounting period, such as when close occurs, use the last date of the current accounting period. The Submit

window will not let you complete submission if the GL Override Date entered is not in the open accounting period.

c) In the Comments box, **do not change or delete the auto generated comments**. Add personal comments below what is already written as needed.

d) Click the **OK** button to send the PDA for approval.