Online Costing Change

Instructions

http://finweb.rit.edu/customersupport/managerselfserve.html
1. Log into Oracle Manager Self Serve
   https:\mybiz.rit.edu

2. From the Responsibilities List (Navigation Window) – select:
   RIT MSS Assignment Cost Change – Assignment Cost Change

3. Search for the Person for the transaction. Enter the last name of the person in the Search field. Select Go. Once the list is displayed select the Action icon next to the person to be changed. Skip to step 4. NOTE: Steps 3a-c are additional search capabilities and instructions on how to build a quick find list.
3a. Build your list of people (This is optional – you can go directly to each individual directly without using My List)
b. Enter Last Name in Search Field:

Select Go – this may take a moment. Click on the box in the Select Column and then click on the button – Add To My List.
### Assignment Cost Change: People in My List

**Select Person:** Home

<table>
<thead>
<tr>
<th>Select</th>
<th>Name</th>
<th>Assignment Number</th>
<th>Job</th>
<th>Department</th>
<th>Action</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Home, Lorraine</td>
<td></td>
<td>Instructional Faculty</td>
<td>CAST Hospitality and Service Management</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Return to People in Hierarchy**
c. Advanced Search – this allows for a search based on a variety of fields.

Search results will be added to the bottom of the screen.
4. From the Search Results screen, select the Action icon next to the person to change the assignment costing.
5. A list of current and future assignment cost information is displayed.

Updates to the Current Cost Account Information can be made to the Effective End Date ONLY. Current Account Cost information cannot be added or deleted. Future Cost Account information can be updated or added but cannot be deleted.

**Note:** Proportion totals for all costing lines must equal 100% at any given time, currently or in the future.

**Current Assignment Cost Information:** Costing information is displayed that is effective for the current pay period. Effective end dates are the only changes that can be made to current costing information and can only be changed to a future date. Effective end dates cannot be back dated.

**Future Assignment Cost Information:** Costing information is displayed that is effective in the future. Costing lines can be added or updated but cannot be deleted. If you need to delete a line, you must change the proportion amount to 0.
6. To add or change an end date of a current costing line, click on the select button next to the line you want updated under the Current Assignment Cost Information section and then click on the Update button.
Enter the new end date in the Effective End Date field and click Apply. Please note that end dates must correspond to the Payroll Pay Period End Dates. Please refer to the Payroll schedule for the Pay Period End dates [http://finweb.rit.edu/controller/payroll/schedule.html](http://finweb.rit.edu/controller/payroll/schedule.html)
7. To update future costing lines click on the select button next to the line you want updated under the Future Assignment Cost Information section and then click on the Update button.
7. Change the existing information and then click Apply.
8. To Add a new Future Dated Costing Information line, Click on Add under the Future Assignment Cost Information section and then Next.
9. Enter the new information in all the fields and then click Apply.
10. The new information is now displayed. Click on Next to move to the Review and Submit for approval page.

Error pages will be displayed if the total proportion for any given time in the future does not total exactly 100% or if any of the cost account code combinations is invalid.
If the total proportion does not equal 100%, click on the Back button and correct the cost accounts affected.
If the cost account code combination is invalid, click on the Back button and correct the cost accounts affected. You may need to contact the Accounting department to verify the correct cost account combination.
11. On the Review page, the new and updated information is displayed.
12. The approver list is at the bottom.
   - The approvers are the Budget Heads or PI of each department number that has been updated or added.
   - If the new information contains a grant or contract number, a SPA representative is listed as the final approver.
   - If Lyn Kelly is listed as an approver, STOP and review the department numbers with the Accounting department to make sure that the correct department Budget Head or PI is active on the department.

13. Additional people can be added as approvers prior to the approver in the hierarchy. Additional people can also be notified and not be part of the approval chain. Select the + next to Add Adhoc Approver.
To add people to either list, enter Last Name in the Approver field and click on the Flashlight icon. Select the person from the results listing.

**Approver Type** – HR People  
**Category** – Approver is added to the approval chain designated at some point before the final approver, *For Your Notification* provides information only and the person has no approval authority.  
**Insertion Point** – The add hoc approver will be added to the list *before* the name selected.

14. Click on Submit to start the electronic approval routing.
### Assignment Cost Change: Review - Microsoft Internet Explorer

#### Additional Information

**Personas:** Additional Information

**Attachments**

*Personalize Attachments.*

To help approvers understand the request, you can attach supporting documents, images, or links to this action.

**None** Add

#### Personalize Approver

**Approvers**

*Personalize Approver.*

<table>
<thead>
<tr>
<th>Details Line No</th>
<th>Approver</th>
<th>Approver Type</th>
<th>Order No</th>
<th>Category</th>
<th>Status</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show 1</td>
<td>Rafferty, Fmm</td>
<td>HR People</td>
<td>1</td>
<td>Approver</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Show 2</td>
<td>Sharpstome, Tammy</td>
<td>HR People</td>
<td>2</td>
<td>Approver</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Show 3</td>
<td>Conception, Milligros</td>
<td>HR People</td>
<td>3</td>
<td>Approver</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Add Adhoc Approver**

**Personalize Comments to Approve**

**Comments to Approve**

**Personas Comments to Approve**

Initiate Comments

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Last Updated: 4/13/2009 2:55:00 PM