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Alert Process Overview

- 1) The Alert Process runs daily to detect changes in SAP master data that impact the CDEM Control Record and/or distributions.
- 2) For HR-assignment changes, the Alert Process attempts to automatically adjust the Control Record and/or distributions. For FI master data changes, the Alert Process issues a message.

Master Data Change	CDEM Automatic Change
HR assignment changes department or pay area (M1/B1)	Control Record delimited, and distribution delimited if applicable
HR assignment is withdrawn	Distribution delimited if applicable
HR the employee retires	Distribution delimited if applicable
FI master data: the cost object availability for posting changed for current or future pay periods	Not automatic. Message Only. Distribution change, or correction of financial master data performed by department
FI master data: the grant budget period shortened	Not automatic. Message Only. Distribution change, or correction of financial master data performed by department
FI master data: the grant budget period extended	Not automatic. Message Only. Distribution change, or correction of financial master data performed by department

- 3) Departments review alert messages via the CDEM application for possible further action.

IMPORTANT NOTE:

- No email notifications are sent. This may be implemented in future.
- Departments should regularly check the CDEM Dashboard for new alert messages.

Key Features of Alerts

- Available from the Dashboard by selecting the Alerts List button
- Available from the Control Record Detail page under the Alerts tab.
- All CDEM users can view alerts for the units to which they have access
- CDEM users with the Plan-Entry role can perform Alert functions
- Messages in areas “FI” or “HR” or “Other”
 - FI – financial master data change requiring a distribution change
 - HR – personnel assignment changes requiring Control Record change
 - Other – (future) user’s HR assignment changes impacting CDEM authorization
- Messages have status “Outstanding” or “Resolved”
 - Facilitates department review and management of messages
- Messages have indicator “Acknowledge Only” true or false
 - “Acknowledge Only” when TRUE, the Control Record change was performed successfully by the system
 - The department reviews and acknowledges the action.
 - If the action is not appropriate, the department takes steps to address it.
 - “Acknowledge Only” when FALSE, some action is required by the department or the CDEM administrator, with instructions provided in the alert message detail.

CDEM Alerts Dashboard

The Alert Message Summary on the CDEM Dashboard provides a quick reference for departments to check for outstanding messages.

- Counts Outstanding messages for Control Records to which the user has access
- Counts Outstanding messages by Action Required VS. Acknowledge Only to help the department assess urgency.
 - “Action Required” messages identify plans that need further action. These should be addressed timely. Until the condition is resolved, the Control Record cannot be delimited.
 - Some messages are resolved when the department approves a new distribution
 - Some messages are resolved by CDEM administrator when correcting issues
 - “Acknowledge Only” messages identify distributions that have been successfully delimited by the alert process due to an assignment change.
 - These messages may alert the department to an assignment (perrn) that was taken over erroneously
 - These messages serve as notification in lieu of email
- The “Average Days Outstanding” indicates how long messages have been waiting for acknowledgement or action.

Navigate to the Alerts List from Dashboard

- Click the View All Alerts button.

Alerts from Dashboard

Summary tile shows counts of alerts requiring action or acknowledgment by category

View All Alerts function navigates to list of alerts

Summary of message for organizational units:				
	Action Required No. Outstanding	Action Required Ave. Days Outs.	Acknowledge No. Outstanding	Acknowledge Ave. Days Outs.
FI Messages	10	41	0	0
HR Messages	6	10	26	11
Other Messages	0	0	0	0
Total	16	0	26	0

Alerts List Page

The Alerts List shows messages for Control Records to which the user has access.

- Allows filtering and sorting by column data
- Allows drill-down to the Control Record
- Shows the most useful information for handling alert messages and saving to Excel
- The leftmost shaded columns are fixed when scrolling to the right, to keep identifying information visible.

Alerts List page

Navigate to Alert Detail


- From the list, the user can navigate to the Alert Detail or to the Control Record.

Navigation to Alert Detail

Name	Person ID	Perrn	Dept No	Org Unit Name	Area
B.	12	20	81080	Entomology	HR
M	00	00	7P275	Public Health Analytics and Informatics	HR
Jc	12	20	7H045	BARNSTABLE BROWN DIABETES CENTER	HR
Lc	10	20	H3180	Imaging Services	HR
Ki	10	11	H3180	Imaging Services	HR
Lc	12	20	MG34G	PEDS-GENERAL	HR

Alerts List - Selection and Filtering

Refer to the screen-capture below for an explanation of Alert List page features.

The Selection Options denoted by  control how much data is loaded from the SAP server.

- Alert Status** defaults to “Outstanding” messages. This is changed by selecting an option from the dropdown and clicking the Apply Status button.

Outstanding	Pending department acknowledgement or action
Resolved	Messages that have been resolved
All	Pending and resolved messages
- Detected Since (date)** defaults to empty (no date). This option is used when Alert Status is set to Resolved or All, to limit how much history is retrieved. Enter a date and click the Apply Date button. The system retrieves messages first detected on or after the date specified.

Filter behavior notes:

- Applying a change to “Alert Status” or “Detected Since” option does not clear column filters
- The filters added by the user will persist when switching from one Control Record to the next, or when returning to the Alert List. Check the filters when expected alerts don’t appear.
- Refreshing CDEM will reset the filter to Outstanding Alerts and clear column filters.

Alerts List Selection Features

The screenshot shows the Alerts List interface with several callouts explaining key features:

- Number of rows meeting selection and filter criteria:** Points to the "Alerts (54)" indicator.
- Toggle Filter:** Hide or show selection option and filter info. Points to the "Toggle Filter" button.
- Clear Filters:** clears column filters, does not refresh rows from server. Points to the "Clear Filters" button.
- Export List to Excel:** Saves filtered rows to Excel. Points to the "Export List to Excel" button.
- Reload Alert List:** reloads from server and applies current Selection Options and Column Filters. Points to the "Reload Alert List" button.
- Selection Options:** refresh rows from server, when Apply Date or Apply Status. Points to the "Apply Date" and "Apply Status" buttons.
- Column filters:** act on rows present and do not refresh from server. **Current Filters:** quick reference for any filters in effect. Points to the "Current Filters: None" indicator.
- Items per page setting, and navigation to specific pages:** Points to the pagination controls showing "54 Results" and "Items per Page:10".

Navigating to Alert Detail page

There are 2 ways to navigate to the Alert Detail page:

From the Alert List, by clicking the Display button to the left of the alert message.

- The detail page appears on the right side of the page
- To navigate to the detail page of the next row, click the Display button on the next row

Alert Detail from Alert List

The screenshot shows the 'Alerts (11)' interface. At the top, there are buttons for 'Toggle Filter', 'Clear Filters', 'Export List to Excel', and 'Reload Alert List'. Below these are filters for 'Detected Since', 'Alert Status' (set to 'Outstanding'), and 'Current Filters: None'. A table lists 11 results with columns for Name, Person ID, Pennr, Dept No, and Org Unit Name. The first row for 'Doe, Jane' has a 'Display' button circled in red. To the right, the 'Alert Detail' panel shows information for 'Doe, Jane 12688998 | 11002222', including message details, resolution instructions, and administrative use. A red arrow points to the 'Close' button (marked with an 'X') in the top right of the detail panel.

From Control Record Detail

- Switch to the Alerts tab, which shows a list of alert messages for the Control Record. The number of outstanding alerts appears on the tab in parentheses.
- Click the Display button to the left of the alert message to open Alert Detail on right.

Tip: For complex alert scenarios or to view all alerts for an individual pennr, it is easiest from the Control Record, which also provides the Assignment History in the tabular form.

Alert Detail from Control Record Detail

The screenshot shows the 'Control Record: Doe, Jane 12688998 | 11002222 | B1 | 30000231 | 81050' interface. The 'Alerts (1)' tab is selected and circled in red with a '1' next to it. Below the tabs, there are buttons for 'Filter', 'Clear Filters', 'Export List to Excel', and 'Reload Alert List'. A table shows 1 result for 'Doe, Jane' with a 'Display' button circled in red with a '2' next to it. To the right, the 'Alert Detail' panel shows information for 'Doe, Jane 12688998 | 11002222', including message details, resolution instructions, and administrative use.

Alert Message Content

The alert message provides information about the condition that caused the alert, the status of the alert and instructions on how to resolve the alert.

Alert fields most relevant to department - definitions	
Row Label(s)	
Message:	Alert message number and general description of associated action. There are distinct message codes for important variations. For example, there is a different message code for when there is a grant in a delimited distribution (50002) VS when there is no grant (50003).
Secondary Message:	Additional information that may be helpful to the department
Message Data	Description of what occurred
Resolution Instructions	Information on how to resolve the alert or action to take.
First Detected/Last Detected	Date the alert condition was first detected; and date alert condition was last detected.
Alert Status	Outstanding vs Resolved
Resolved By / Resolved Date	UserID of individual (or system ID) resolving the alert and the date
Resolution Action	Information about what action resolved the alert
Days Outstanding	Days between First Detected Date and Resolved Date, or current date if not yet resolved
Other fields (Alert Class, etc.)	Technical details primarily for administrative use

Alert Detail

- [Acknowledge](#)
- [Reset](#)
- [Notes](#)
- [Assignment History](#)
- [X](#)

Name: Doe, Jane 12688998 | 11002222
Org Unit: 30000231 | 81050 | Biosystems & Agr Engineering

Most relevant to departments

Message: 50002 | Control Record and IT27 delimited. Grants in delimited distribution
Secondary Message: Department may wish to check the distribution. Use "Acknowledge" function to resolve.

Message Data: CR delimited to 01/31/26|Dist delimited to 01/31/26|PayArea changed to M1

Resolution Instructions: Department uses "Acknowledge" function to resolve the alert.

First Detected: 03-09-2026 10:02:46 **Last Detected:** 03-09-2026 10:02:46
Alert Status: OUTS | Outstanding
Resolved By: **Resolved Date:**
Resolution Action: | **Days Outstanding:** 4

Alert Class: CRDT | CR effective period change

Alert Area & Type: AUTO | Automatic - System

ConRec Original Period: 02-01-2024 to 12-31-9999
ConRec New Period: 02-01-2024 to 01-31-2026

Original Active Plan: 000200158235
New Plan: 000200168893
New Plan Status: 70 | Active
New Plan Source: CDEM

For administrative use:

Message Key: 000100022764|50002|20260306|20260131|
M1|30000231
CR_ID: 000100022764

Alert ID: 000500000327

Alert Message Functions

- The alert functions correspond to the buttons visible at the top right of the Alert Detail page.
- Users with Plan-Entry role have access to acknowledge an alert and create notes.
- Only the functions applicable for the alert message are visible.
- There is no explicit “resolve” alert function.
 - For informational messages, the Acknowledge function is used to change the alert status to “Resolved”
 - For alerts w/o the Acknowledge option, some action must be performed to resolve the condition that triggered the alert message. This action may involve changing the distribution or could involve correcting master data or Control Record.

Alert Functions - at top of Alert Detail page



Function	Description
Acknowledge	<ul style="list-style-type: none"> • Acknowledge function changes the status of an informational alert to “Resolved.” • Will be visible and enabled only for informational messages posted after an automatic alert is processed. • Works with the Reset function, which reverses the acknowledgment, and returns the message to “Outstanding” status
Reset	<ul style="list-style-type: none"> • Reset function reverses an acknowledgment and changes the status of a “Resolved” informational alert to “Outstanding.” • Will be visible and enabled only for informational messages that have been acknowledged. • This function is not used frequently. Only when an informational message has been erroneously resolved.
Notes	<ul style="list-style-type: none"> • Optional notes are entered by departments. • Notes should be used sparingly to provide additional information not apparent in alert messages. • See section on Notes for more information
Assignment History	<ul style="list-style-type: none"> • List of all HR assignments (info-type 0001) associated with the pernr of the Control Record. • Available for department reference when evaluating alert messages. • The user can see assignments for units to which they have access plus the new assignment (if in a different unit) which triggered the Control Record change.

Department Routine – best practice

- 1) Designated department users should routinely check the CDEM dashboard for new messages.
- 2) Recommended frequency is daily, but at minimum, 2 to 3 times per week.
 - o The alerts process will run at minimum once daily and be completed by 7am. See Alerts Schedule and Details at the end of this document.
- 3) If there are outstanding messages in the Dashboard Summary, navigate to the Alerts List.

From the Alert List, the Detected Since date should be empty and Alert Status set to Outstanding

Detected Since:

Apply Date

Alert Status:

Outstanding ▼

Apply Status

- 4) Address “Action Required” messages first, and in timely fashion

For some messages, until the condition is resolved, the Control Record cannot be delimited, which may impact the ability for other departments to create a Control Record when the department has changed.
- 5) “Acknowledge Only” messages are less critical to be addressed timely

However, these messages could alert the department to pennr changes that were not correct, for instance, when a pennr (assignment) is taken over by another department erroneously.

Depending on the volume of messages, the user may want to filter the messages in groups for handling.

- The user may also add a filter on Dept No, or partial Dept No.
- Before applying new filters, always use the Clear Filter function at top right

Examples of possible filters to apply, when large volume of messages:

Filter for HR area, department action required

Area ▼

HR x Search by area...

- Sort Ascending
- Sort Descending

Action ▼

REQ x Search by action...

- Sort Ascending
- Sort Descending

Filter for FI area, department action required

Area ▼

FI x Search by area...

- Sort Ascending
- Sort Descending

Action ▼

REQ x Search by action...

- Sort Ascending
- Sort Descending

Filter for HR area, acknowledge only

Area ▼

HR x Search by area...

- Sort Ascending
- Sort Descending

Ack Only ▼

True x Search by Ack Only...

- Sort Ascending
- Sort Descending

Filter for FI area, acknowledge only

Area ▼

FI x Search by area...

- Sort Ascending
- Sort Descending

Ack Only ▼

True x Search by Ack Only...

- Sort Ascending
- Sort Descending

Handling Alerts that Require Department Action

These messages have Action Type = REQ, short for Dept Action Required.

- In most cases, the action to be taken involves processing a new plan with a distribution change. CDEM has attempted to delimit a distribution, but has encountered a problem:
 - The delimited distribution that CDEM created has an error. The department needs to correct the error. It may involve dealing with a proration adjustment for a grant or some other error, like incorrect Earliest Retro Date.
 - The alert process will not replace an in-progress plan if it has been initiated into the workflow. The department needs to approve the plan.
 - The alert process will not replace an in-progress plan if it was created 7 days or less from detection of the issue. This gives the department time to complete the plan.
- Other conditions involve master data issues. The department should correct the data in SAP if possible or contact the appropriate area for assistance. These are the current issues detected:
 - Change pay area (B1->M1) or (M1->B1) occurs on a “bad” date, or the timing is wrong with payroll processing.
 - FI master data for closed grant or cost center.

Department Action Required – current messages		
Area	Message	Secondary Message/Resolution instructions
HR	50004 Control Record and IT27 TO BE delimited. Delimited in-progress plan has error.	Department should clear error on the in-progress plan started by the CDEM Alert process, and approve for delimiting the IT27 distribution
HR	50006 New department invalid - 00000000	New organization unit is 00000000: invalid SAP data. Department should correct the HR assignment. The Control Record is temporarily invalid until the alert is resolved.
HR	50010 Payroll area change may have occurred on a bad date	Department should contact Compensation to review the date of the payroll area change and for next steps. The Control Record is temporarily invalid until the alert is resolved.
HR	50012 Control Record and IT27 TO BE delimited. In-progress plan recently created.	Department should complete the in-progress plan and delimit the distribution per additional info provided.
HR	50013 Control Record and IT27 TO BE delimited. In-progress plan in workflow.	Department should approve the in-progress plan and delimit the distribution per additional info provided.
HR	50052 Assignment withdrawn, separated or retired. Delimited plan has error.	Department should clear error on the in-progress plan started by the CDEM Alert process and approve it, to delimit the distribution.
FI	52000 Grant budget period shortened, distribution invalid	Create new plan to remove cost object in the periods needed or correct master data
FI	52002 Cost object is not open for posting in current or future pay period	Create new plan to remove cost object in the periods needed or correct master data

Screen-capture examples of messages requiring department action.

➔ The guidance on how to resolve the alert is highlighted in red in the Secondary Message and Resolution Instructions.

Example 50004 message requiring plan activation

Alert Detail [Notes] [Assignment History] [X]

Notes are present for this alert. Click to view.

Name: Da [redacted] | 100 [redacted] 3 | 110 [redacted]
 Org Unit: 30000074 | 3J522 | Health and Wellness

Message: 50004 | Control Record and IT27 TO BE delimited. Delimited in-progress plan has error
Secondary Message: Department should clear error on the in-progress plan started by the CDEM Alert process, and approve for delimiting the IT27 distribution
Message Data: CR delimited to 01/24/26|Dist delimited to 01/24/26|OrgUnit changed to 1B310

Resolution Instructions: Existing in-progress plan activation resolves the alert.

First Detected: 01-29-2026 20:28:28
 Alert Status: RES | Resolved
 Resolved By: BAT-FI
 Resolution Action: PLAN | Plan Approved

Last Detected: 01-29-2026 20:28:28
 Resolved Date: 01-29-2026
 Days Outstanding: 0

Alert Class: CRPR | CR plan resolution
 Alert Area & Type: REQ | Required - Department

➔ For message 50010 (and some others), note the text boxed in red: the Control Record becomes invalid, temporarily. This is so no distribution changes can be processed until the issue is resolved, since the issue may impact the Control Record effective period or the rules for distribution periods.

Example 50010 message requiring HR master data correction

Alert Detail [Notes] [Assignment History] [X]

Notes are present for this alert. Click to view.

Name: Gc [redacted]
 Org Unit: 31006179 | 40113 | Opioid/Subst Abuse RPA

Message: 50010 | Payroll area change occurring on bad date.
Secondary Message: Department should contact Compensation to review the date of the payroll area change and for next steps. **The Control Record is temporarily invalid until the alert is resolved.**
Message Data: PayArea change on bad date|M1->B1 Biweekly final has posted.

Resolution Instructions: Check with Payroll Services for confirmation that date is incorrect.

First Detected: 02-12-2026 09:17:10
 Alert Status: RES | Resolved
 Resolved By: BAT-FI
 Resolution Action: IND | Issue no longer detected

Last Detected: 02-13-2026 08:38:09
 Resolved Date: 02-13-2026
 Days Outstanding: 1

Alert Class: HRMD | HR MD change
 Alert Area & Type: REQ | Required - Department

Alert Notes [X]

[BAT-FI] 01-23-2026 14:02:18 [Edit] [Delete]

Control Record set to Valid.

[Add Note] [Cancel]

Notes are present for this alert

➔ Example of FI message, requiring a plan change or master data change.

Example 52000 message requiring distribution plan change, or master data correction.

The screenshot shows an 'Alert Detail' window with the following information:

- Name: X [redacted]
- Org Unit: 30000346 | 7H [redacted] | Can [redacted]
- Message: 52000 | Grant budget period has been shortened, distribution invalid.
- Secondary Message: Create new plan to remove grant in the periods needed or correct master data
- Message Data: 320 [redacted] Budget Period shortened: TO DT from 05/31/26 to 10/17/25 in Dist Periods: 10/05/25 to 10/18/25
- Resolution Instructions: Adjust CDEM distribution or correct master data.
- First Detected: 01-27-2026 15:08:17
- Alert Status: OUTS | Outstanding
- Resolved By: [redacted]
- Resolution Action: |
- Last Detected: 01-27-2026 15:08:17
- Resolved Date: [redacted]
- Days Outstanding: 49
- Alert Class: FIPR | FI plan resolution
- Alert Area & Type: REQ | Required - Department

Two callout boxes are present:

- Secondary Message and Resolution Instructions indicate how to resolve...** (points to the Secondary Message and Resolution Instructions)
- This message is outstanding, and will be resolved if a new plan is created, removing the grant from the periods specified. OR - if grant budget dates corrected.** (points to the Alert Status and Resolution Action)

Handling Alerts that are “Acknowledge Only”

All messages are informational and have Ack Only indicator = TRUE.

- In most cases, these messages inform the department when a Control Record and possibly the associated distribution are delimited due to a change in the department or the pay area (M1/B1).
 - If the HR assignment change was not correct, for instance the new department used the wrong pernr, then contact the new department to correct HR master data.
 - If the HR assignment change is correct, no further action is required, but the department may wish to review the delimited distribution.
- Other messages vary to scenario, from PERNR removed from master data to grant budget period extended.

Acknowledge Only – current messages		
	Message	Secondary Message/Resolution instructions
HR	50001 Control Record delimited. IT27 no change.	Use "Acknowledge" function to resolve.
HR	50002 Control Record and IT27 delimited. Grants in delimited distribution.	Department may wish to check the distribution.
HR	50003 Control Record and IT27 delimited. No grants in delimited distribution.	Department may wish to check the distribution.
HR	50011 PERNR no longer exists in SAP.	The Control Record was removed by CDEM alerts process. Department may want to check if a distribution is needed on another PERNR for the Person ID.
HR	50050 Assignment withdrawn, separated or retired, IT27 delimited	The department may wish to check the distribution.
FI	52001 Grant budget period extended *	Create new plan to add cost object to future periods, or correct master data.

* FI message 52001 | Grant budget period extended

These messages are issued only if “Notify when budget period extend” box is checked in the CDEM Commitments

CDEM Commitment entry

320 | 2 CAR | 30C

Budget Per: 08-01-2021 - 07-31-2027 Last C

Pre-award:

Department: 81080 | ENTOMOLOGY

Pers Resp: R |

Notify when budget period extend

Screen-capture examples of messages requiring acknowledgement.

➔ Example of HR message, requiring acknowledgment

Example 50002 message requiring Acknowledge

Alert Detail

Name: Ly
Org Unit: 30000342 | 7H750 | Physiology

Message: 50002 | Control Record and IT27 delimited. Grants in delimited distribution
Secondary Message: Department may wish to check the distribution. Use "Acknowledge" function to resolve.

Message Data: CR delimited to 02/28/26|Dist delimited to 02/28/26|OrgUnit changed to 7H100

Resolution Instructions: Department uses "Acknowledge" function to resolve the alert.

First Detected: 03-05-2026 09:05:17
Alert Status: RES | Resolved
Resolved By: DG
Resolution Action: ACK | Acknowledge

Last Detected: 03-05-2026 09:05:17
Resolved Date: 03-05-2026
Days Outstanding: 0

Alert Class: CRDT | CR effective period change
Alert Area & Type: AUTO | Automatic - System

Secondary Message and Resolution Instructions indicate how to resolve...

This message is resolved, by User DG.

Steps to acknowledge an alert:

- 1) From the Alert List or the Control Record Detail-Alert tab, display the alert message using the Display button
- 2) Click the Acknowledge button
- 3) The Perform Alert Action dialog will appear.
 - Enter **optional** notes.
TIP: enter notes only if there is an issue with the Alert action performed. If the Control Record was correctly delimited, there is no reason to add a note when acknowledging.
 - Click Submit to acknowledge and resolve the alert or Cancel to close without acknowledging.

33 Results Items per Page:10

Resolution Instructions: Department uses "Acknowledge" function to resolve

Perform Alert Action dialog

Optional Notes

Optional note is usually not necessary when acknowledging.

Submit Cancel

Optional: enter notes if appropriate.

Submit to perform the function.

Cancel or X to close without performing the function.

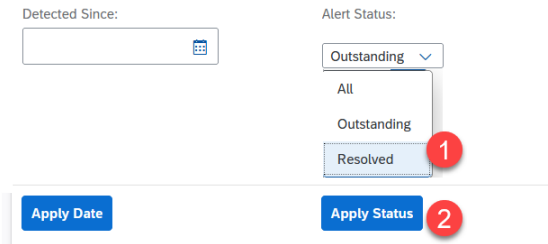
System Behavior Note: After the alert has been acknowledged, the system refreshes the page to reset the functions available and reselect data from the server. If the Alert Status selection option is set to “Outstanding”, the acknowledged alert will no longer be present in the list.

Steps to find the acknowledged alert and Reset.

- This might be done if the alert message was acknowledged in error or prematurely.

1) From the Alert List or the Control Record Detail-Alert tab, change the Alert Status selection to Resolved or All

TIP: When searching for an alert for an individual, it is easiest to start with the Control Record Detail - Alert Tab.



- 2) Find the resolved alert message in the list and use Display button to open Alert Detail.
- 3) Click the Reset button, which opens the Alert Action dialog. Click Submit to perform the reset.

Resolved Alert with notes

Alerts that require CDEM Administrator Action

These messages have Action Type = MAN, short for Manual.

- These all involve correcting a Control Record effective period or department or pay area (M1/B1), that were changed automatically by a previous alert action.
- The CDEM administrator will fix the Control Record as required and will add notes to the alert to communicate what the correction entailed.
- The Control Record is temporarily invalid in all cases to prevent creation of distributions in an incorrect period, or for an incorrect pay period.

Manual CDEM Administrator resolution – current messages		
	Message	Secondary Message/Resolution instructions
HR	50007 Control Record begin date is incorrect.	CDEM administrator will resolve the alert. The Control Record is temporarily invalid until the alert is resolved.
HR	50008 Control Record end date is incorrect.	CDEM administrator will resolve the alert. The Control Record is temporarily invalid until the alert is resolved.
HR	50009 Control Record payroll area or department is incorrect.	CDEM administrator will resolve the alert. The Control Record is temporarily invalid until the alert is resolved.

Screen-capture examples of messages requiring CDEM administrator action.

For all these types of messages, the Assignment History provides information on how the HR assignment data changed, and CDEM History of the assignment at time the condition was detected.

Example 50008 message - CDEM administrator resolves

Alert Detail

Notes
Assignment History
X

Notes are present for this alert. Click to view.

Name: Jer [redacted]
Org Unit: 31008881 | MG34F | PEDS-FORENSIC

Message: 50008 | Control Record end date is incorrect.

Secondary Message: CDEM administrator will resolve the alert. The Control Record is temporarily invalid until the alert is resolved.

Message Data: Control Record end date correction

Resolution Instructions: CDEM administrator resolves the alert manually.

First Detected: 03-06-2026 08:38:35

Alert Status: RES | Resolved

Resolved By: DGA

Resolution Action: MAN | Manual Control Rec key field adjustment

Last Detected: 03-09-2026 10:02:46

Resolved Date: 03-09-2026

Days Outstanding: 3

Alert Class: CRDT | CR effective period change

Alert Area & Type: MAN | Manual - CDEM admin

ConRec Original Period: 06-30-2024 to 01-10-2026

ConRec New Period: 06-30-2024 to 12-31-9999

Original Active Plan:

New Plan:

New Plan Status: |

New Plan Source:

Secondary Message and Resolution Instructions indicate how to resolve...

Message resolved by CDEM administrator adjusting the Control Record effective period

Control Record effective period change described here.

Alert Note Function

Alert Notes are associated with an individual alert message

- Notes can be created by a CDEM user who has the Plan-Entry role or by the Alert Process.
- The Alert Process creates a note to provide additional information specific to the Control Record or Plan associated with the alert message
- CDEM users should create notes sparingly to provide additional information not otherwise discernable by the alert message content.
 - **Example of appropriate note:** “Assignment change causing the Control Record to be delimited was incorrect. I am contacting the department that created the new assignment.”
 - **Example of superfluous note:** “I have acknowledged this alert.”
- The screen-capture below shows 2 possible buttons for viewing and maintaining notes
- Notes can be updated or deleted only by the individual who created the note or by a CDEM administrator.
- If notes are present for an alert, the “Notes are present” button appears at the top of Alert Detail. Use this function to view and potentially add more notes.
- The “Notes are present” and Notes buttons open the same dialog window, from which notes can be viewed, added, updated or deleted.

Alert Note functions

Click "Notes are present" button to view notes and add more notes

Click Notes button to add first note.

Open the same dialog window

Alert Detail

Notes are present for this alert. Click to view.

Name: Haj [redacted] | 12E [redacted] | 20 [redacted]
 Org Unit: 30000236 | 81090 | Forestry and Natural Resources

Message: 52000 | Grant budget period has been shortened, distribution invalid.
 Secondary Message: Create new plan to remove grant in the periods needed or correct master data

Message Data: 3048 [redacted] Budget Period shortened: FROM DT from 08/01/25 to 09/01/25 TO DT from 12/01/26 to 08/31/26 in Dist Periods: 11/14/25 to 11/30/26
 Resolution Instructions: Adjust CDEM distribution or correct master data.

First Detected: 01-27-2026 15:08:17
 Alert Status: RES | Resolved
 Resolved By: BAT-FI
 Resolution Action: PLAN | Plan Approved

Last Detected: 01-27-2026 15:08:17
 Resolved Date: 01-28-2026
 Days Outstanding: 0

Alert Class: FIPR | FI plan resolution
 Alert Area & Type: REQ | Required - Department

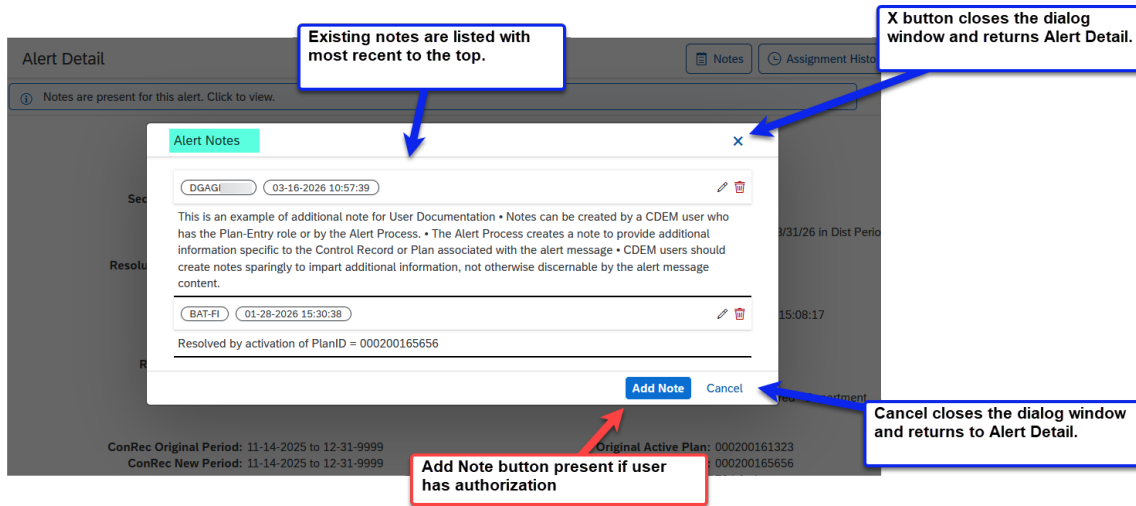
ConRec Original Period: 11-14-2025 to 12-31-9999
 ConRec New Period: 11-14-2025 to 12-31-9999

Original Active Plan: 000200161323
 New Plan: 000200165656
 New Plan Status: 70 | Active
 New Plan Source: DEPT

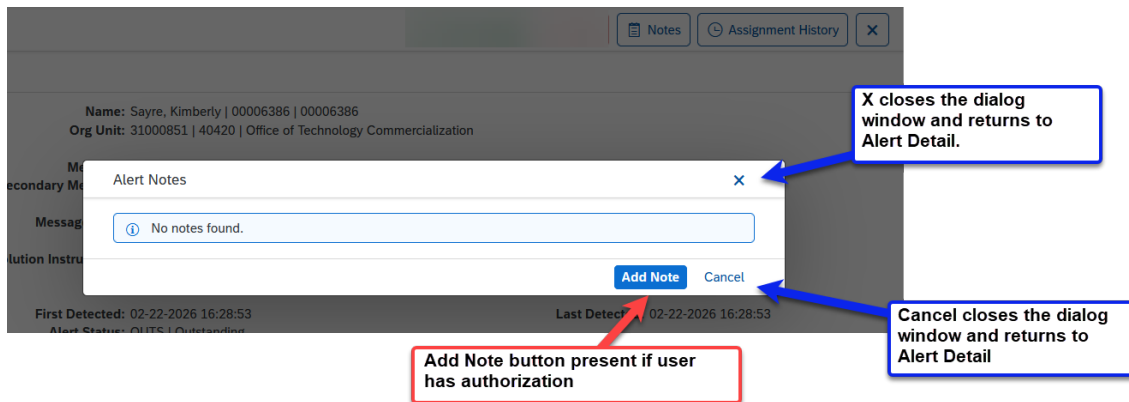
Add Note

1) Click the Add Note button at bottom of dialog window

Alert Note dialog window - when "Notes are present"



Alert Note dialog window - first note

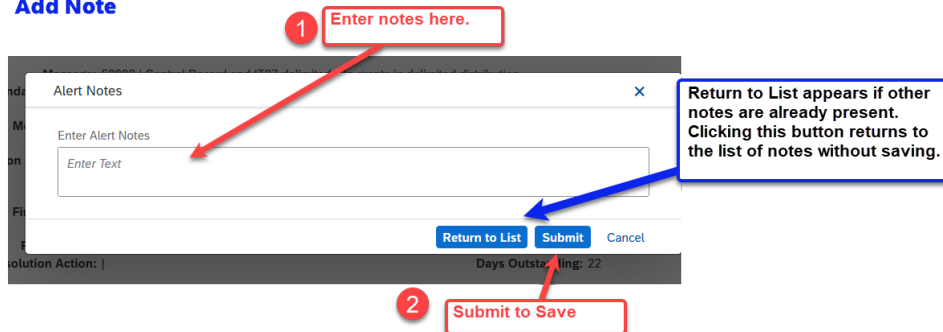


Add Note dialog:

2) Enter text

3) Click Submit to save. Click Cancel or X to close without saving.

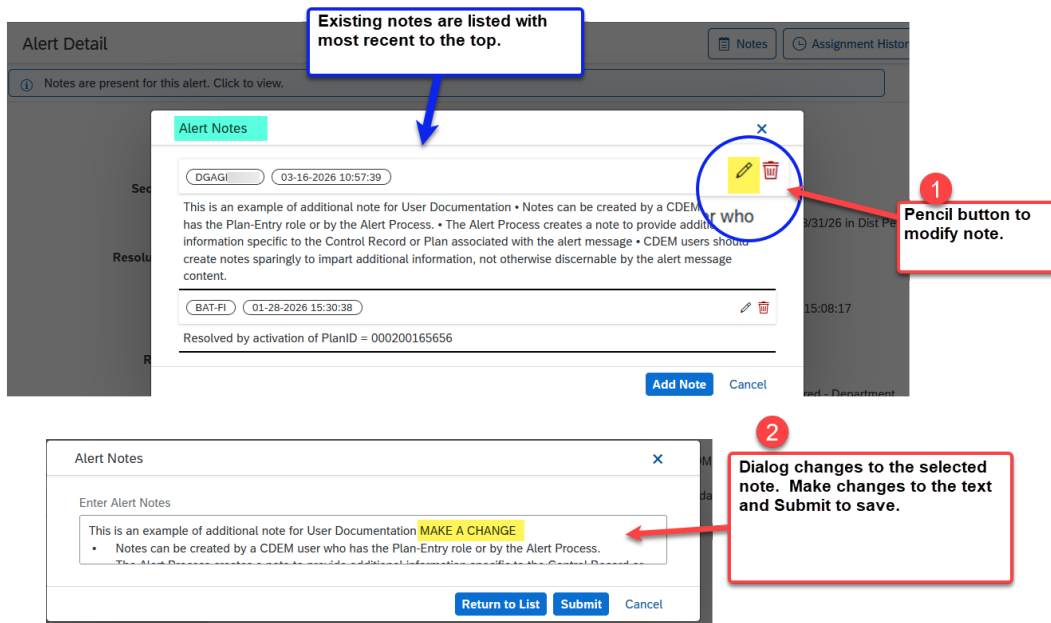
Add Note



Update Note

- 1) From “Notes are present” dialog, click the Pencil icon to update
- 2) Make the text change in the entry area and click Submit to save.
 “Return to List” closes the update dialog and returns to the note list WITHOUT saving.
 “Cancel” closed the update dialog and returns to the Alert Detail WITHOUT saving.

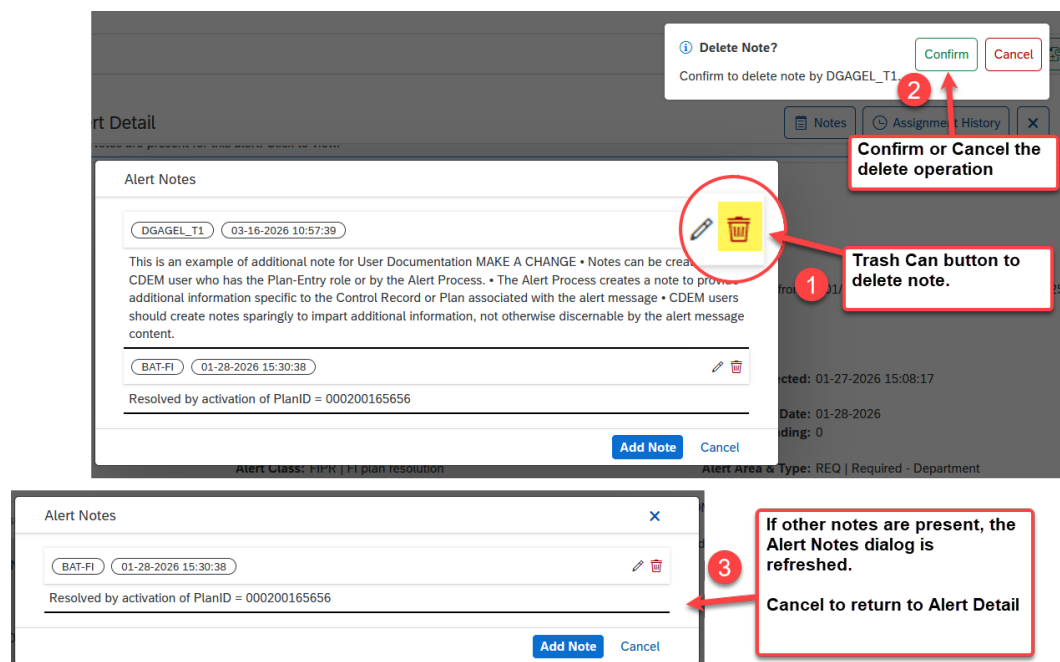
Alert Note Update



Delete Note

- 1) From “Notes are present” dialog, click the Trash Can icon to delete
- 2) Confirm the deletion in the pop-up confirmation .

Alert Note Delete



Assignment History

The HR assignment history (info-type 0001) is provided in CDEM for department convenience when reviewing alerts. It has two types of rows:

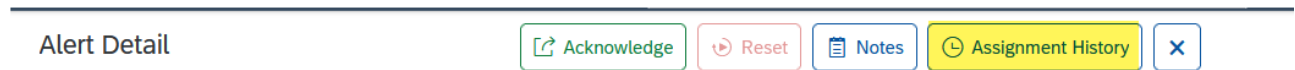
- 1) HR assignments - listed at the top, with most current first
 - These are all the assignments for the pernr currently in SAP, in the units to which the user has access. (And within the Control Record period)
 - The user cannot view assignments in other areas, with one exception.
 - The user can view the assignment immediately following the last assignment in their unit. This enables the user to view the assignment that potentially triggered the HR-type alert.

- 2) CDEM detected HR assignments – listed at the bottom, with most current first
 - These are changes in HR assignments that triggered a CDEM alert (And within the Control Record period)
 - These are saved in CDEM to provide history as to why a Control Record was delimited due to either an organization (department) change or a change in payroll area (B1/M1).
 - The original HR assignment triggering the change may eventually be reversed or corrected, and not apparent in the top “HR assignments” list.

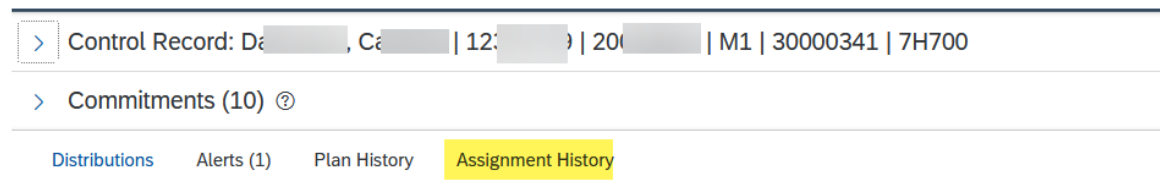
Assignment History is available from the Alert List on the Alert Detail page, and from the Control Record Detail, on the Assignment History tab.

Viewing assignment history from the Control Record provides a tabular layout which is easier to use.

Assignment History - from Alert List, Alert Detail functions



Assignment History - from Control Record Detail, Assignment History tab



Assignment History from the Control Record Detail tab:

Assignment history is best viewed from the Control Record Detail, on the Assignment History tab:

- Tabular format makes the changes easier follow
- Control Record header can be expanded to compare with the assignment (info-type 0001)
- The current HR-assignment history is listed first, with Source = IT-0001 (in green)
- The CDEM History follows, with Source = CDEM History (in purple)
 - CDEM History is a snapshot of the assignment detected by the alerts and requiring a change in Control Record department or pay area.
 - Since HR assignment history can be changed or deleted, the CDEM history assists with reconstructing why an alert was processed.

Most Control Records will have 2 CDEM History entries:

- The first when the Control Record is created (see number 2 below)
- The last when the Control Record is delimited due to an assignment change in department or pay area (See number 3 below)
- Other reasons for CDEM History entries:
 - Capture withdrawn assignments or retirements when distribution delimited (not in this example)
 - Corrections to an assignment change that require manual adjustment to a Control Record (See number 4 below)

Control Record: Fu... | 12... | 2C... | M1 | 30000342 | 7H750

Person ID: 12... | Perm: 2C... | Payroll Area: M1 | Org Unit: 30000342 | 7H750 | Physiology | Record Effective: 07-09-2024 to 02-28-2026 | Emp Status: 3 | Active | Alerts: 0

Position: 510... | Scientist III | Job: 40500035 | Scientist II

Commitments (6)

Assignment History

Source	Detect Date	Pay Area	Org. Unit	Begin Date	End Date	Position	Pers SubArea	Modified By	Modify Date
IT-0001		M1	30000334 7H100 Department of Neuroscience	03-06-2026	12-31-9999	510... Sci	0001 Reg FT	CL	03-11-2026
IT-0001		M1	30000334 7H100 Department of Neuroscience	03-01-2026	03-05-2026	510... Sci	0001 Reg FT	CL	03-11-2026
IT-0001		M1	30000342 7H750 Physiology	08-01-2025	02-28-2026	510... Sci	0001 Reg FT	LL	08-06-2025
IT-0001		M1	30000342 7H750 Physiology	07-09-2024	07-31-2025	510... Sci	0001 Reg FT	LL	07-09-2024
CDEM-									
CDEM History	03-10-2026	M1	30000334 7H100 Department of Neuroscience	03-01-2026	03-05-2026	510... Sci	0001 Reg FT	CL	03-09-2026
CDEM History	03-09-2026	M1	30000334 7H100 Department of Neuroscience	03-06-2026	12-31-9999	510... Sci	0001 Reg FT	CL	03-06-2026
CDEM History	08-22-2024	M1	30000342 7H750 Physiology	07-09-2024	12-31-9999	510... Sci	0001 Reg FT	LL	07-09-2024

Annotations:

- 1: Control Record department and effective period (highlighted in yellow)
- Info-type 0001 history (green box)
- CDEM detect history (purple box)
- 2: The Control Record was created on 8/22/24 (Detect Date). CDEM captures the assignment information when the Control Record is created. Note the Control Record start date (highlighted in yellow above) reflects the 7H750 assignment begin date of 7/9/24.
- 3: On 3/6/26 (Modify Date) the assignment changed to department 7H100 effective 3/6/26 (Begin Date). This triggered an alert to delimit the Control Record and distribution to 3/5/26. This would have been an automatic alert performed by CDEM and acknowledged by the department
- 4: On 3/9/26 (Modify Date) the effective date of the 7H100 assignment changed to 3/1/26 (Begin Date). This triggered another alert to adjust the Control Record delimit date. This would have been a manual alert, requiring the CDEM administrator intervention. Note the Control Record end date (highlighted in yellow above) reflects 2/28/26, per the new 7H100 assignment start of 3/1/26.

Assignment History from the Alert List - Alert Detail page:

- Due to the layout of the Alert Detail page displayed from the Alert List, the Assignment History cannot be presented in tabular form but instead is presented in a pop-up dialog window.
- If a pernr has multiple assignment changes, it is best to drill down to the Control Record Detail and view from the Assignment Detail tab.

Assignment List from the Alert List - Alert Detail page

Assignment History for PERNR 20

Source	Assign Period
IT-0001	03-06-2026 to 12-31-9999
IT-0001	03-01-2026 to 03-05-2026
IT-0001	08-01-2025 to 02-28-2026
IT-0001	07-09-2024 to 07-31-2025
CDEM-	Assign Period: to
CDEM History Detect Date: 03-10-2026 07:49:36	Assign Period: 03-01-2026 to 03-05-2026

Info-type 0001 history

CDEM detect history

Close

Alert Process Schedule

Alert Process Schedule and details		
Alert Job Name	Description	Frequency
FI Alert	<p>Detects FI master changes impacting the validity of cost distributions:</p> <ul style="list-style-type: none"> • Detects cost objects not valid for posting in the current or future periods • Detects grants with shortened budget periods • Detects grants with extended budget periods <p>In both cases, CDEM attempts to delimit the info-type 0027 by processing a new plan. CDEM creates a message indicating whether the operation was successful, or whether department intervention is required to clear errors on an in-progress plan and complete the process.</p>	<p>Daily</p> <p>Prior to 7am</p>
HR Alert	<p>Detects changes in payroll area or organization and automatically delimits the Control Record and the info-type 0027 distribution when applicable.</p> <ul style="list-style-type: none"> • If successful, an informational message is created for the department to acknowledge. • If not successful, an action-required message is created for the department to take additional steps. <p>Detects when the PERNR is removed from SAP. This happens on occasion, before the PERNR is processed through payroll.</p> <ul style="list-style-type: none"> • An informational message is created for the department to acknowledge. <p>HR assignment change must be 1 day old (per the last changed date) before an action is performed. This builds a buffer to allow for the HR change to be completed.</p>	<p>Daily</p> <p>Prior to 7am</p>
HR Withdrawn / Retirement	<p>Detects withdrawn assignments and retirements and delimits the distribution to the last day of the pay period in which the person last worked, if applicable</p> <ul style="list-style-type: none"> • If successful, an informational message is created for the department to acknowledge. • If not successful, an action-required message is created for the department to take additional steps to complete the delimit of the distribution <p>Reminder: Control Records are not delimited for withdrawn assignments and retirements.</p>	<p>TBD – weekly vs daily?</p> <p>Prior to 7am</p>