Assign Costing Allocation for Temporary and Student Employees

The following describes the process of adding or updating the costing allocation for temporary or student job/position funded by a grant, project, or gift **OR** a split funded job/position.

WHO CAN INITIATE this process?

- Administrative Assistant
- Manager

***ONLY USE THIS PROCESS for adding or updating the costing allocation details for a temporary or student job/position.**

If you have any questions or encounter any errors during this process contact Workday Customer Care (973-655-5000 option 3 or WCCSupport@montclair.edu).

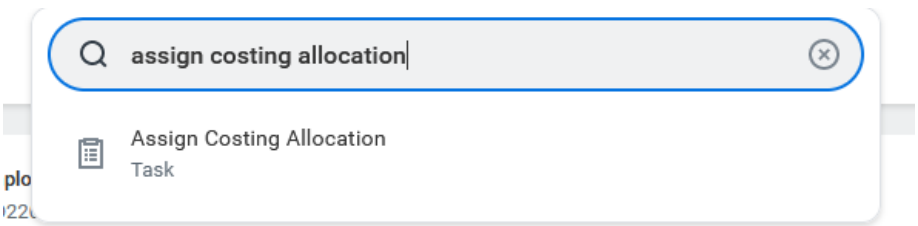
Approval Workflow in Workday

1) Initiation of process by Administrative Assistant or Manager
2) Approval by Human Resources
3) Approval by Grant Accounting (if applicable)

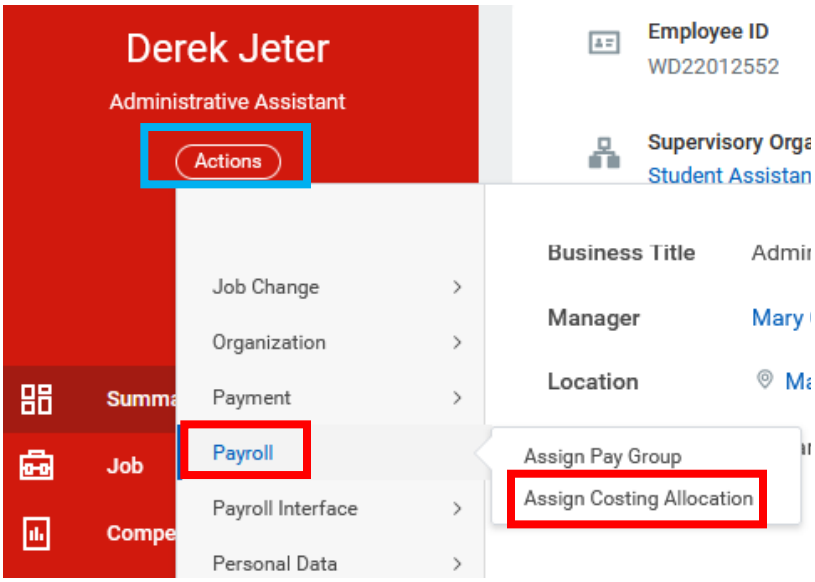
Instructions

1) There are two ways to initiate the assign costing allocation process:

   1. **Option 1**: In the workday search bar type **Assign Costing Allocation** and select the Assign Costing Allocation Task.



2. **Option 2**: Go to the employee's worker profile by searching for the employee in the Workday search bar. Click on the related actions icon → Payroll → Assign Costing Allocation.

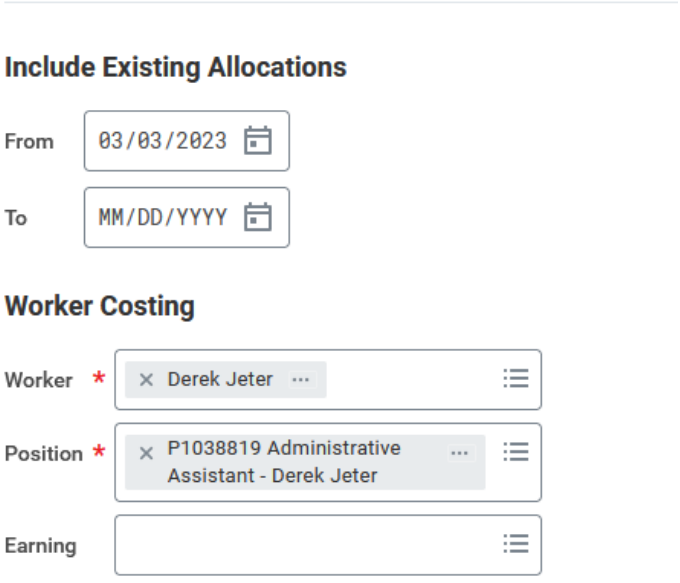


2) Fill in the blank prompts.

1. **Worker**: If it is not already populated, search for and select the worker/employee.

2. **Position**: If it is not already populated, select the appropriate job/position.

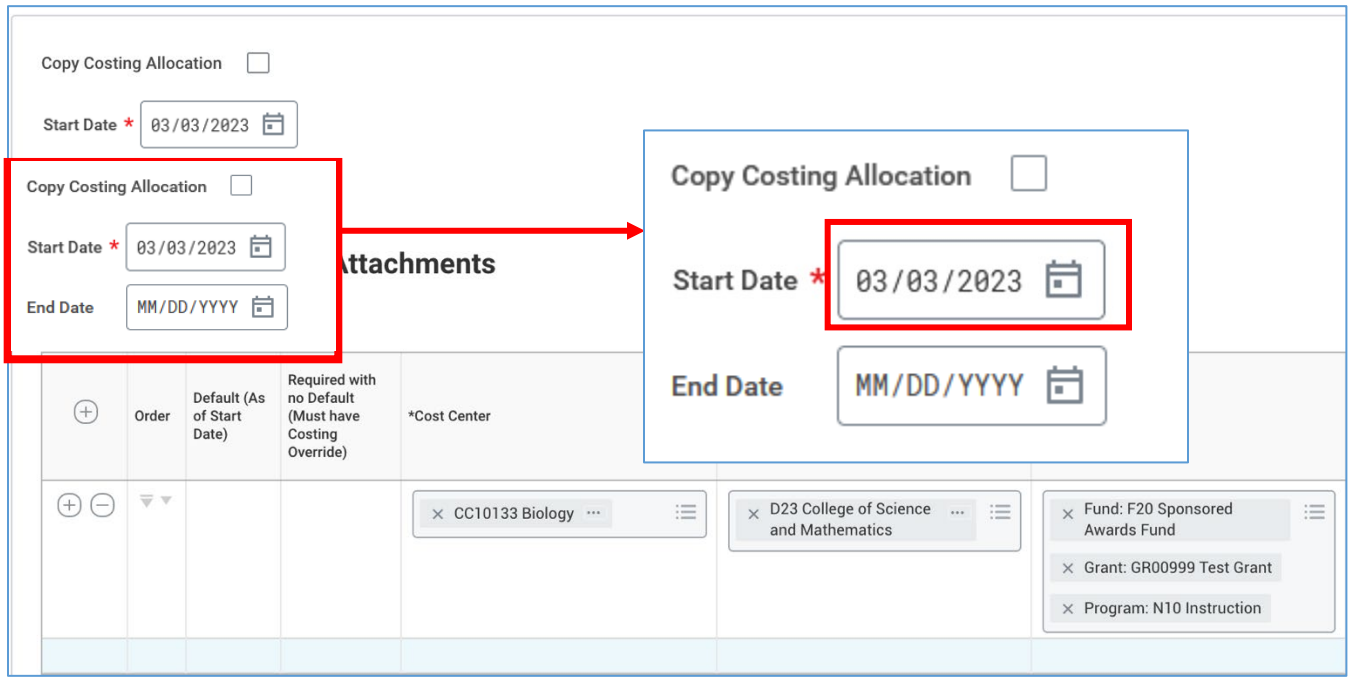
NOTE: If there is a current grant/gift assigned to an employee, but you do not see it on the costing allocation screen, revise the **from** date under the **Include Existing Costing Allocations** header.



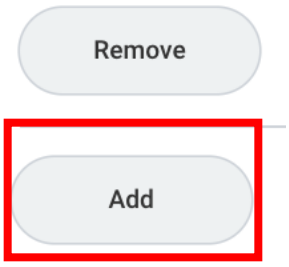
3. Enter the new allocation details or update the existing allocations.

If costing allocation details already exist and you are adding a new grant/gift or split funding, you need to end the existing allocations and add the new information on another line (using the add button). If you are only extending the end date, simply revise the current end date and provide the extension details in the comment section.

a. Enter an end date to the existing costing allocation details. If an end date is already entered, then you can change the end date or you can move on to the next step (b) to add the new costing allocation details.

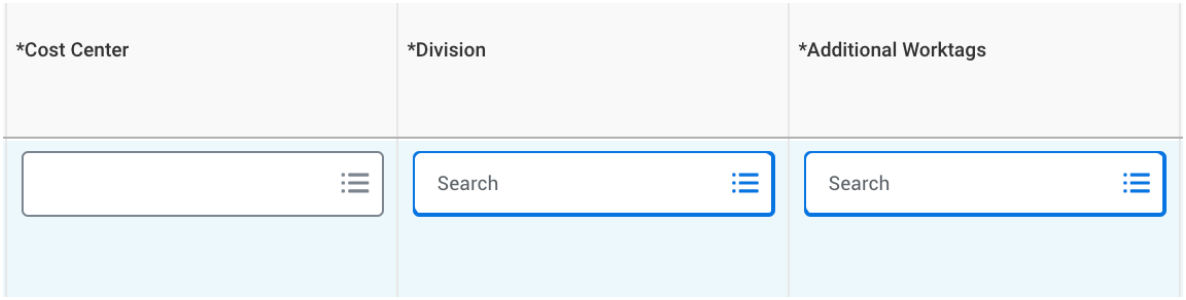


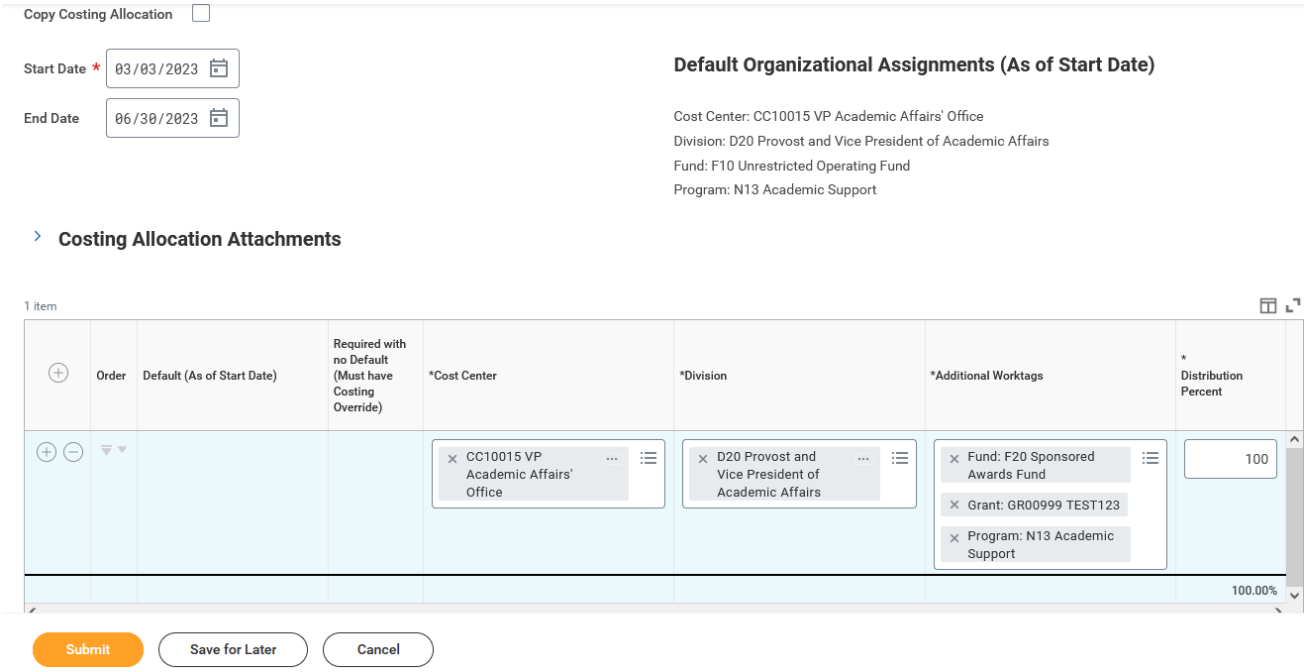
b. Scroll down and click the **Add** button to add the new costing allocation details.



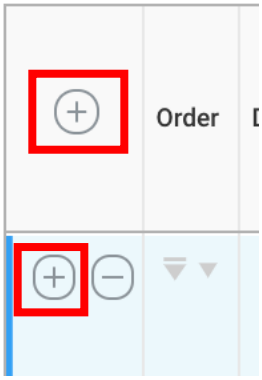
c. Enter the **start and end date** of the new costing allocation details. The start date will be the day after the old costing allocation details end date.

d. Add your worktags. We suggest you enter the grant or gift worktag first (if applicable) because it will automatically pull in the related worktags.





e. If the job/position is split funded you can click the plus sign button to the left to add another line.



f. Click **Submit** at the bottom of the page.