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Existing Cost Center Modification Request.

This guide provides steps for an Existing Cost Center Modification Request to be completed directly in Workday. This request is used to modify, inactivate, or re-activate existing cost center. Modifications to existing cost center include: changing its name, hierarchy and/or default worktags.

The Security Groups allowed to initiate this Existing Cost Center Modification Request process are Cost Center Finance Specialist, Cost Center Manager and Division Manager. Central users have access to initiate all Workday worktag Requests.

If access to Workday is required please use the Security Role Request Form: https://www.montclair.edu/finance-and-treasury/wp-content/uploads/sites/158/2020/02/Workday-Security-Role-Request-Form_non-academic_-02212020.pdf
Create Request

1) In the Search field, enter Create Request.

OR if you have the worklet on your dashboard, click on the Requests worklet, then click Create Request. To add the worklet to your desktop see page 12 of this Job-Aid.

2) Click All in the Request type field and select the radio button next to the Existing Cost Center Modification Request option.
3) Click OK

4) **Complete the questionnaire.** All questions should be answered, if the question is not applicable please enter ‘N/A’.

**Please note:** This Request is to **modify** an existing cost center directly in Workday and should not be used to create a new cost center. For **New Cost Center Request** see the General Accounting tab of Workday Resources worklet on your desktop;

If you are submitting a request to **inactivate a Cost Center** be aware that **all** of the following need to be resolved prior to your request:
- Commitments and Obligations must be closed or moved;
- Cost Center members (employees assigned to the Cost Center) need to be re-assigned;
- Outstanding receivables balances must be resolved.

**Provide Cost Center for which modification is being requested**

- Enter the existing Cost Center ID number – e.g. CC1X3XX

- Enter the existing Cost Center Name (Description) – e.g. Academic department
Specify Modification Request:

- Select Modification Request: **Name Change (only)** – enter the proposed new name for the existing Cost Center:

  Select Modification Request: (Required)
  
  - Name Change (only)
  - Hierarchy (only)
  - Default worktags - Fund or Division or Program (only)
  - Combination of Change of Name, Hierarchy and Default Worktags
  - Inactive
  - Re-activate

  Proposed New Name: (Required)

- Select Modification Request: **Hierarchy (only)** – Enter the existing hierarchy for the Cost Center alongside the new proposed hierarchy of the Cost Center in the format as illustrated in the questionnaire.

  Tip: Create formatted hierarchy in Excel/Word and then paste in the text box. Use the right-side bottom corner (shown with diagonal lines) to expand the text box if necessary.

  Select Modification Request: (Required)
  
  - Name Change (only)
  - Hierarchy (only)
  - Default worktags - Fund or Division or Program (only)
  - Combination of Change of Name, Hierarchy and Default Worktags
  - Inactive
  - Re-activate

  Proposed New Hierarchy: Please provide existing cost center hierarchy and proposed new hierarchy - indicate using the following format.
Select Modification Request: **Default worktags – Fund or Division or Program (only)** – Enter the existing default worktags for the Cost Center alongside the proposed default worktags of the Cost Center in the format as illustrated in the questionnaire.

Tip: Create formatted defaults in Excel/Word and then paste in the text box. Use the right-side bottom corner (shown with diagonal lines) to expand the text box if necessary.

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All are (Required)
● Select Modification Request: **Combination of Change of Name, Hierarchy and/or Default worktags** – Enter the combination of proposed changes for the Cost Center alongside the current values of the existing Cost Center in the format as illustrated in the questionnaire.

Tip: Create formatted list in Excel/Word and then paste in the text box. Use the right-side bottom corner (shown with diagonal lines) to expand the text box if necessary.
Select Modification Request: Inactive – Confirm that all employees have been moved from the existing Cost Center and there are no employees being paid using this existing Cost Center. Also confirm that all obligations (e.g. purchase orders), commitments (e.g. requisitions) and/or reserve journals are completed and where necessary liquidated.

If confirmed Yes, enter the Cost Center to which the employees were moved or if not applicable indicate ‘N/A’ or type an explanation.

If No is selected the request will not submit – an error message is triggered as a Cost Center cannot be inactivated if there is any activity still to occurring using this Cost Center worktag.

Note: The request will be sent back if any obligations, commitments reserve journals or employees are found to be associated with this Cost Center.
● Select Modification Request: **Re-activate** – Enter the date for the re-activation.

![Re-activate selection](image)

Please confirm the effective date of re-activation (Required)

- MM/DD/YYYY

● Enter the reason for the modification request.

![Reason for Modification](image)

Reason for Modification: Provide a reason for the requested modification (Required)

● Enter the effective date you are requesting this change.

![Effective date](image)

- MM/DD/YYYY

5) Click **Submit** to route the request for approval. There will be an error message if there are any unanswered questions. If so, enter ‘N/A’ into the text box and click the Submit button again.

6) If **Save for Later** is selected, the request will be located in the Inbox where it may be selected and completed at a future date.
7) If there is a need to **Cancel** the Request. Find the request either in your Inbox (Archive)…

…Or in the worklet Requests.

From the related actions of the Request select Cancel.
Approval Workflow

1) The Existing Cost Center Modification Request will be sent to the Approver's Inbox.

2) Review the questions and answers of the questionnaire with emphasis on the related worktags, and if request is to inactivate the Cost Center, confirm there are no obligations, commitments or employees associated with or assigned to the Cost Center.

   ![Questionnaire Image]

   **Please Note:** Changes to existing Cost Centers may impact obligations and commitments. Also very importantly, changes to Cost Centers may impact employees assigned to the Cost Center. Please confirm all necessary re-assignments are completed if this Request is for inactivate Cost Center.

3) Once the questionnaire is reviewed either:

   - **Approve** to advance the questionnaire to the next step of the process,
• **Send Back** to the Initiator/Approver to revise the questionnaire,

![Send Back](image)

Add Approvers to show your approval but will not progress to the next step until this additional approval is submitted.

![Add Approvers](image)

4) In order to follow up on the status of the request:

- **as Initiator** – Click the **Request** worklet on the Home page and view *My Recent Requests*.

- **as Approver** – From with the Archive tab of the Inbox, click the **Process** tab of the **View Event option** on the Request.

![Requests](image)
Add Requests Worklet to the Home Dashboard

1) Click the **gear icon** on the Workday Home page.

![Montclair State University Home Page](image)

2) Click the **Plus sign** and select **Requests** from the prompt.

![Configure Worklets](image)

3) Click **OK** and **Done**.

The Requests worklet displays on your Home Page.

![Montclair State University Home Page](image)