



# Finance: Create Request – Existing Cost Center Modification



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## Existing Cost Center Modification Request.

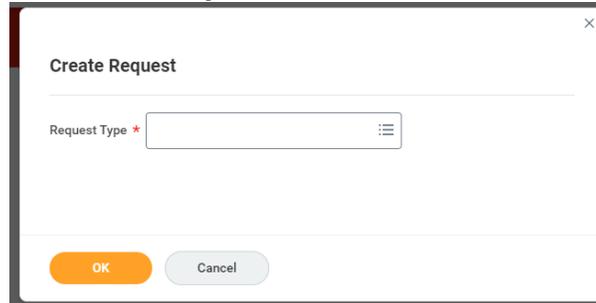
This guide provides steps for an **Existing Cost Center Modification Request** to be completed directly in Workday. This request is used to modify, inactivate, or re-activate existing cost center. Modifications to existing cost center include: changing its name, hierarchy and/or default worktags.

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.

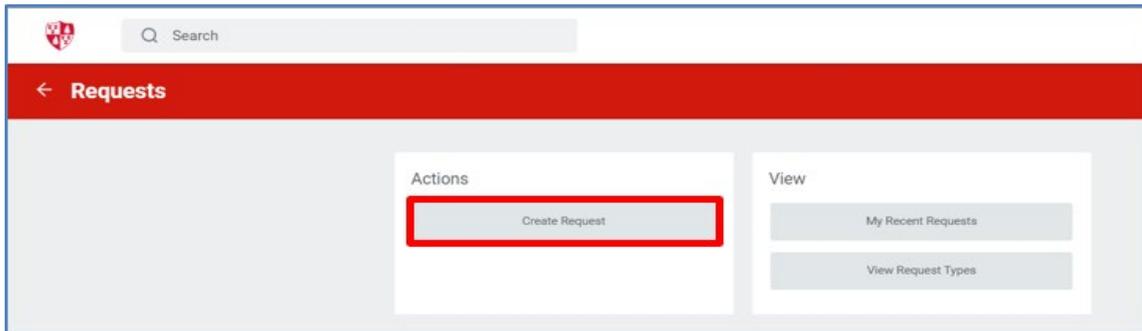
If access to Workday is required please use the *Security Role Request Form*: [https://www.montclair.edu/finance-and-treasury/wp-content/uploads/sites/158/2020/02/Workday-Security-Role-Request-Form\\_non-academic\\_-02212020.pdf](https://www.montclair.edu/finance-and-treasury/wp-content/uploads/sites/158/2020/02/Workday-Security-Role-Request-Form_non-academic_-02212020.pdf)

# Create Request

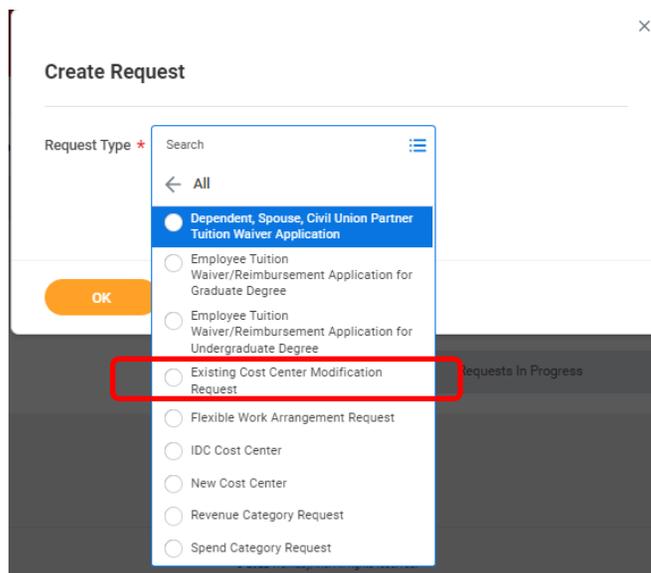
1) In the *Search* field, enter **Create Request**.



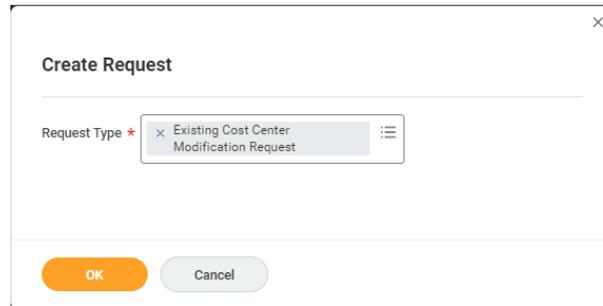
**OR** if you have the worklet on your dashboard, click on the **Requests** worklet, then click **Create Request**. To add the worklet to your desktop see page 12 of this Job-Aid.



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;



Workday  
Resources

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

Existing Cost Center ID: Enter the ID for the existing Cost Center (Required)

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

Existing Cost Center Name: Enter the Name of the existing Cost Center (Required)

## 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:

CCH - Existing CC Hierarchy	CCH - Proposed CC Hierarchy
CCH L1	CCH L1
CCH L2	CCH L2
CCH L3	CCH L3 (Required)

- 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.

- 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

Please indicate the change in default worktags in the following format (using columns):

Existing Default Worktags:	Proposed New Default Worktags:
Fund	Fund
Division	Division
Program	Program

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.

- 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

Please enter the new name of the Cost Center, and/or the hierarchy for Cost Center Rollup, and if applicable, the new default worktags.

Please follow the formats:

**\*\*Existing Cost Center Name:**  
Proposed New Cost Center Name:

**\*\*Change Cost Center Hierarchy (using columns below):**

CCH - Existing CC Hierarchy	CCH - Proposed CC Hierarchy
CCH L1	CCH L1
CCH L2	CCH L2
CCH L3	CCH L3

**\*\*Change in default worktags (using columns below):**

Existing Default Worktags:	Proposed New Default Worktags:
Fund	Fund
Division	Division
Program	Program

All applicable changes are (Required)

- 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: (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

Confirm the existing Cost Center has moved all employees and all requisitions, purchase orders and reserved journals are closed/removed. (Required)

- Yes, I confirm all employees and all requisitions, purchase orders and reserved journals are closed/removed.
- No, this modification cannot be done unless all employees and all requisitions, purchase orders and reserved journals are closed/removed.

If employees in the existing cost center had to be moved, to which Cost Center were they moved? (Required)

- Select Modification Request: **Re-activate** – Enter the date for the re-activation.

- 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

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

MM/DD/YYYY 

- Enter the reason for the modification request.

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

- Enter the effective date you are requesting this change.

Effective date: Please provide date for requested modification (Required)

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 the 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.



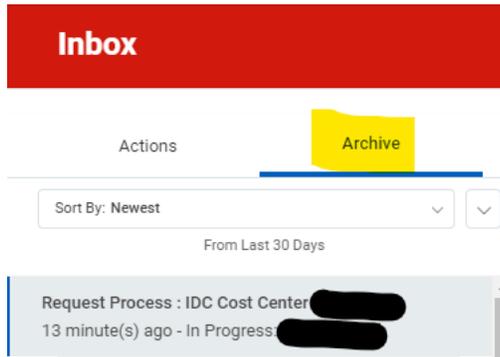
**Event saved. Awaiting submission**

Up Next: Request, Due Date 03/26/2021

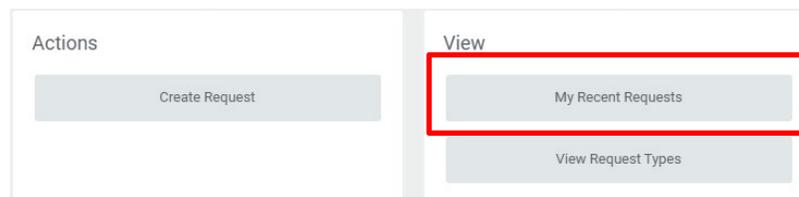
[View Details](#)

[Review](#) →

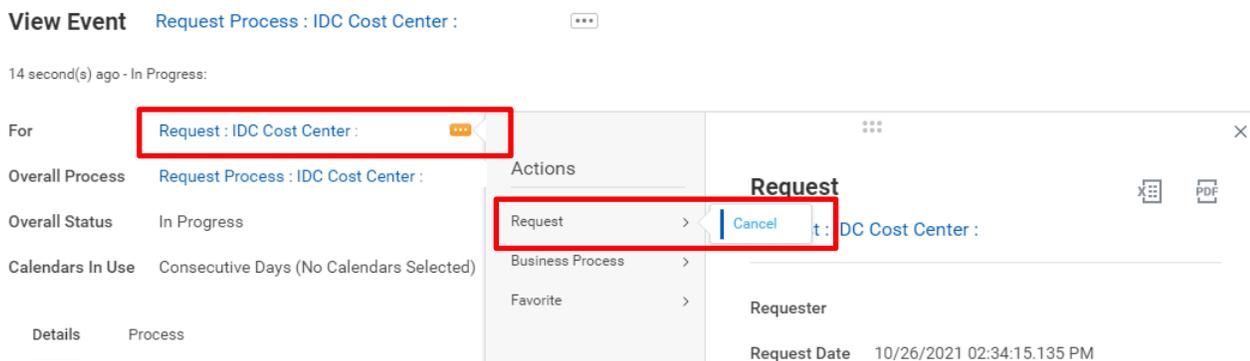
7) If there is a need to **Cancel** the Request. Find the request either in your Inbox (Archive)...



...Or in the worklet Requests.



From the related actions of the Request select Cancel.



Request [Request : IDC Cost Center](#)  
Request Type IDC Cost Center  
Request Date 10/26/2021 02:34:15.135 PM  
Requester

# Approval Workflow

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

**Review** Request Process : Existing Cost Center Modification Request : ⋮ ☆ ⚙

24 second(s) ago - Due 01/20/2022

[This is a modification to an existing Cost Center.](#)

Please review the questionnaire responses related to the existing Cost Center.

**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.

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.

Question	Answers
Existing Cost Center ID: Enter the ID for the existing Cost Center	
Existing Cost Center Name: Enter the Name of the existing Cost Center	
Select Modification Request:	
Proposed New Hierarchy: Please provide existing cost center hierarchy and proposed new hierarchy - indicate using the following format:  CCH - Existing CC Hierarchy      CCH - Proposed CC Hierarchy CCH L1                                      CCH L1 CCH L2                                      CCH L2 CCH L3                                      CCH L3	
Reason for Modification: Provide a reason for the requested modification	
Effective date: Please provide date for requested modification	02/01/2022

3) Once the questionnaire is reviewed either:

- **Approve** to advance the questionnaire to the next step of the process,

The image shows a horizontal row of four buttons: 'Approve' (orange), 'Send Back' (grey), 'Add Approvers' (grey), and a three-dot menu button (grey). A dropdown menu is open from the three-dot button, containing three options: 'Deny' (blue), 'Save for Later' (grey), and 'Cancel' (grey).

- **Send Back** to the Initiator/Approver to revise the questionnaire,

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

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*.



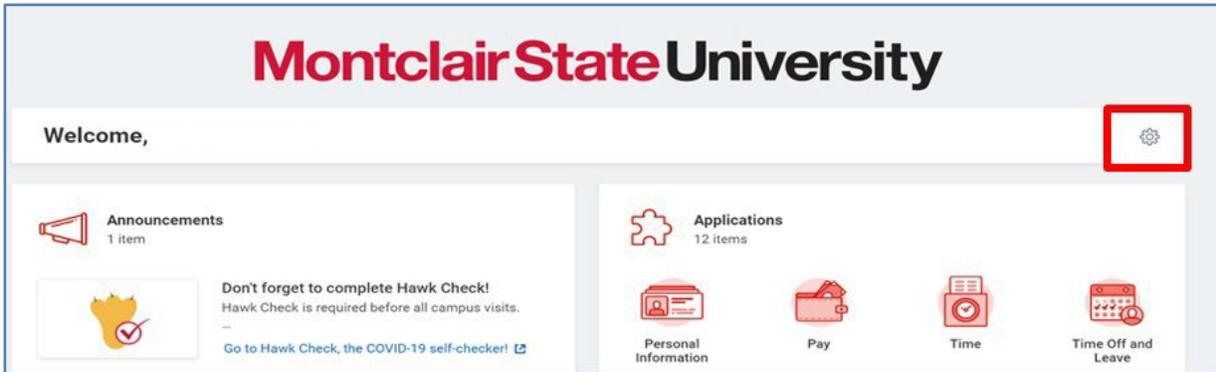
Requests

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

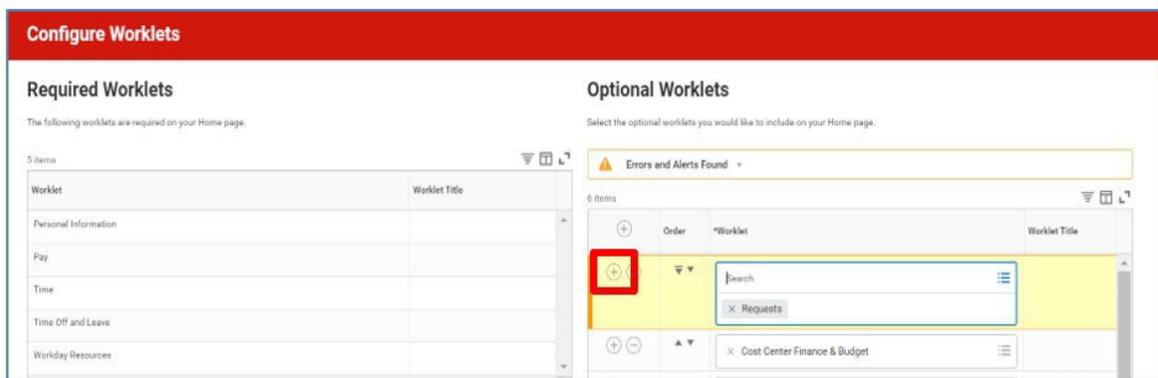
Process	Step	Status	Completed On	Due Date	Person
Request	Request	Step Completed	03/24/2021 01:21:20 PM		
Request	Approval by Cost Center Manager	Approved	03/24/2021 01:32:55 PM	03/26/2021	
Request	Approval by Division Manager	Approved	03/24/2021 01:33:28 PM	03/26/2021	
Request	Approval by Cost Center Level 2 Approver	Approved	03/24/2021 01:34:47 PM	03/26/2021	

# Add Requests Worklet to the Home Dashboard

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



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



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

The Requests worklet displays on your Home Page.

