



# Creating or Editing Cost Allocations



*The Creating or Editing Cost Allocations tip sheet is for Budget Analysts.*

## Cost Allocations Overview

Budget analysts can create allocations for positions in Workday. Changing the source funding of a position may be accomplished via the task, **Assign Costing Allocation**, or as a subprocess during **Hire**.

These steps apply to the process as part of the Assign Costing Allocation task.

## Assign Cost Allocation(s) for a Position

To navigate to the cost allocations page, login to Workday and follow these steps:

1. In the search bar, type "Assign Costing Allocation"
2. Select the **Assign Costing Allocation** task.
3. Search for and select an employee. The current position will auto-populate.
4. Click **OK**.

On the cost allocations page, follow these steps:

**Note:** Check dates for the periods in question. The start date of the new allocation must be after the end date of the previous allocation, or you will receive an error.

1. Check the box to copy the costing allocation. This creates a duplicate space for updating information from the previous entry. If the new allocation is for a temporary position or has a known end date, enter it here.
2. Make appropriate changes to **Cost Center** (required), **Work Tags**, and other relevant fields.
3. Click the "+" sign to add another row if the allocation should be split across different accounts. The total **Distribution Percent** whether for one account or multiple accounts must add up to 100.

## Viewing Cost Allocations

Cost allocations can be reviewed using the **All Workers Costing Allocations – By Company** report. To use the report, follow these steps:

4. Enter **All Workers Costing Allocations – By Company** in the search bar.
5. Select your college and click **OK**.
6. Columns in the report without a white primary header can be filtered. (e.g., searching for specific workers, start dates, or positions. Filter on the variable needed.)
7. Scrolling across to the right, will show related allocation details. Items in blue have related actions.