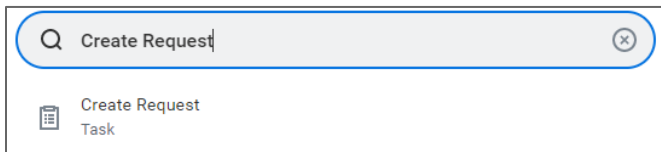## Request Costing Allocation for Oneself Overview

This Quick Reference Guide (QRG) is designed to walk a **Payroll Costing Manager** and **Payroll Costing Specialist** through the task of requesting a Costing Allocation for themselves in Workday.

NOTE	Workday does not allow you to complete a Costing Allocation for yourself (they consider it a conflict of interest). This process can be used to submit a request to Central Finance for setting up your costing allocation.

Procedure: Request Costing Allocation for Oneself

On the Workday **Home** screen:

1. Type **Create Request** in the search field.

2. Select the **Create Request** from the **Search Results**.

On the **Create Request** screen:

3. **Request Type –** "Costing Allocation for Oneself."
    Either type this in the field and hit enter, or search using the drop-down menu.

4. Click **OK** to proceed.

On the **Costing Allocation for Oneself** screen:

5. Complete the following required fields:
    - **What Position Number is the Costing Allocation for?** Type position number for the costing allocation.
    - Provide Costing Allocation details such as **Earnings, Start Date, End Date, FDM worktags** and **distribution percentages** for each set of worktags, etc. associated with the costing allocation being requested.
      Type the costing allocation details required for processing the request.

NOTE	**Key Considerations:** The same validation requirements are true for requesting your own costing allocation as when assigning one for someone else. • **End Date** – this is **required** when using Grant Worktags or if setting up multiple sequential costing allocations.

	• **Gift, Grant, Designated,** or **Project** worktags – one of these is **required** for each costing allocation line.
	• **Fund** and **Cost Center** worktags – these are also **required** but may auto-populate based on other worktags selected. Be sure to specify which to use.
	• **Other worktags –** Function, Program, and Additional Worktags may auto-populate based on other worktags selected. Be sure to specify which to use.
	• **Distribution Percent** – the distribution percent in all allocation lines must total 100% and each line must have some percentage allocated to it.

6. Add attachments, if desired:
   - Drag and drop any supporting documentation to the field or select the **Select Files** button to browse your documents. Enter description (optional).
   - To continue adding additional documents, click the Upload button.
   - Click the trash can icon next to any attachment to remove it.

7. Click **Submit.**

You have successfully completed this task. It will now be routed based on the configuration.