



Contents

Request for IDC Cost Center.....	1
Create Request	2
Approval Workflow	7
Add Requests Worklet to the Home Dashboard	9

Request for IDC Cost Center

Grants often provide funds to cover University facilities and administration costs (also known as “F&A” or “indirect costs” or “overhead”). It is the University’s policy to distribute a portion of this cost recovery to various organizations within the University such as department, college, and principal investigator. These funds are normally used to support future research. These funds, and associated expenses, are tracked in specific IDC Cost Centers.

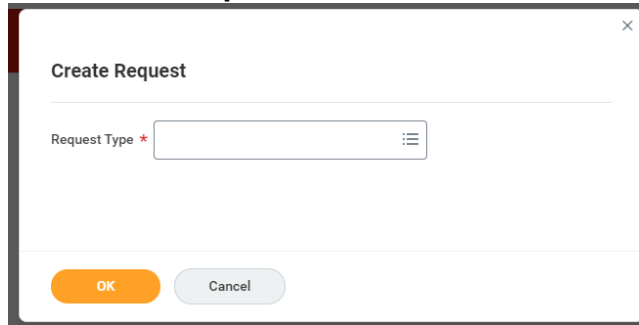
This guide provides steps for requesting an **IDC Cost Center** directly in Workday. It applies to Cost Centers which are created to capture indirect cost recovery revenue and related expenses. This form does not pertain to distribution or allocation of any IDC costs it is meant purely to ensure that a IDC cost center is set up in a timely manner.

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

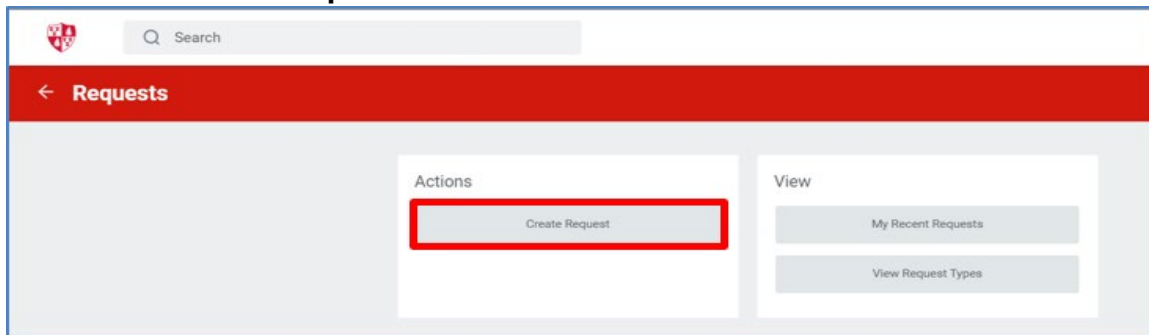
If access to Workday is required please use the *Security Role Request Form*:
https://www.montclair.edu/finance-and-treasury/wp-content/uploads/sites/158/2020/02/Workday-Security-Role-Request-Form_non-academic_-02212020.pdf

Create Request

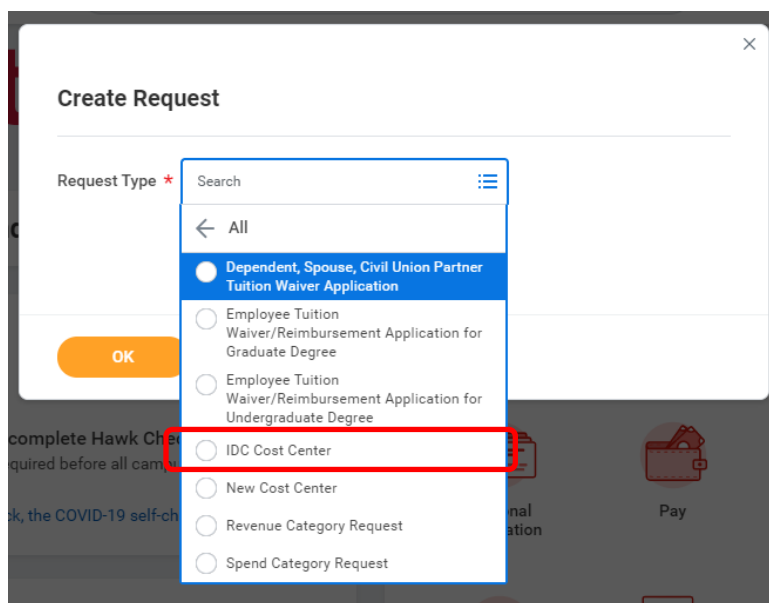
1. In the *Search* field, enter **Create Request**.

A modal window titled "Create Request" with a close button (X) in the top right corner. It contains a "Request Type" field with a red asterisk and a dropdown menu icon. At the bottom, there are two buttons: "OK" (orange) and "Cancel" (gray).

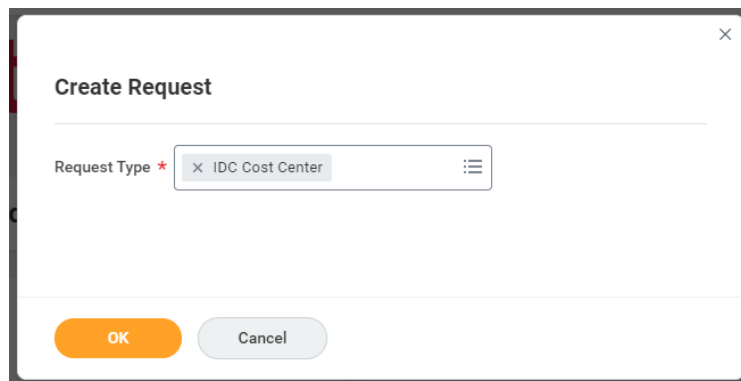
OR if you have the worklet on your dashboard, click on the **Requests** worklet, then click **Create Request**.



- 2) Click **All** in the Request type field.
- 3) Select the radio button next to the **IDC Cost Center** option.

A screenshot of the "Create Request" modal with the "Request Type" dropdown menu open. The menu lists several options, each with a radio button. The "IDC Cost Center" option is highlighted with a red rectangle. The options are: "All", "Dependent, Spouse, Civil Union Partner Tuition Waiver Application", "Employee Tuition Waiver/Reimbursement Application for Graduate Degree", "Employee Tuition Waiver/Reimbursement Application for Undergraduate Degree", "IDC Cost Center", "New Cost Center", "Revenue Category Request", and "Spend Category Request".

4) Click OK



The screenshot shows a 'Create Request' dialog box. At the top, there's a title bar with a close button. Below it, the title 'Create Request' is centered. Underneath, there's a label 'Request Type' followed by a red asterisk. To the right of the label is a dropdown menu showing 'IDC Cost Center' with a small 'x' icon to its left and a menu icon to its right. At the bottom of the dialog, there are two buttons: an orange 'OK' button and a grey 'Cancel' button.

2) **Complete the questionnaire.** All questions should be answered. If not applicable please enter 'N/A'.

- **Cost Center Name:** Please use the following format when entering the Cost Center Name. Using the format as provided in the question write the name of the department, or center, and add '- IDC' as the suffix (at the end). **OR** if for a PI (principal investigator) write the Last name and First initial of the PI's name, and add '-IDC' as the suffix (at the end).

Cost Center Name: Please use the following format when entering the Cost Center Name:

1. If this IDC Cost Center request is for a Department IDC Cost Center, or an IDC Cost Center for a Center, please spell out the entire name as it exists in Workday and add '- IDC' at the end (e.g. Academics Department - IDC or Center of Autism - IDC).
2. If this IDC Cost Center request is for a Principle Investigator (PI) IDC Cost Center, please use Last Name and First Initial of the PI and '- IDC' at the end (e.g. Doe J - IDC).

NOTE: PI is Principle Investigator also referred to as Grant Manager in Workday. (Required)



An empty rectangular text input field with a thin border and a small cursor icon at the bottom right corner.

- **Cost Center Manager:** Provide first and last name, and title, for the employee who will be the Cost Center Manager for the proposed IDC Cost Center. Provide the full name and title for the person who is going to be the Cost Center Manager for this proposed IDC Cost Center.

Cost Center Manager: Provide first and last name, and title, for the employee who will be the Cost Center Manager for the proposed IDC Cost Center.

If this is for a PI IDC Cost Center, the PI will be the Cost Center Manager.

NOTE: If the employee for Cost Center Manager role does not have existing security access for Workday please complete the Request for Security Role form on the University website: 020.pdf. (Required)



An empty rectangular text input field with a thin border and a small cursor icon at the bottom right corner.

- Is this Cost Center for the Principal Investigator's share of IDC? If this proposed IDC Cost Center **is** for the PI's share of indirect cost recovery, and you have selected '**Yes**', enter the first and last name of the PI **and** the organization to which they are normally assigned. This is also the cost center that is associated with the Grant. The example provided is Biology Department.

NOTE: It is very important to provide the organization to which the PI is assigned as this is the hierarchy to which this IDC Cost Center will roll up to.

Is this Cost Center for Principal Investigator share of IDC? (Required)

- ☒ Yes
☐ No

If this Cost Center is for PI IDC, please provide the First and Last Name of the PI and the Organization (Cost Center) to which they are assigned - e.g. Biology Department.

NOTE: PI is Principle Investigator also referred to as Grant Manager in Workday. (Required)

- Is this Cost Center for the Principal Investigator's share of IDC? If this proposed IDC Cost Center **is not** for the PI's share of indirect cost recovery, and is for a Department or Center's share of indirect cost recovery, **and** you have selected '**No**', enter the name of the Department (Cost Center and Cost Center ID) to which this IDC Cost Center should roll up to. For example, if this is for proposed IDC Cost Center *Biology – IDC* it would roll up to the same hierarchy as Cost Center - CC10133 Biology

Is this Cost Center for Principal Investigator share of IDC? (Required)

- ☐ Yes
☒ No

Please provide the name and ID of the Cost Center which this proposed IDC Cost Center will roll up to (e.g. if this is for the IDC of the Academics Department then indicate: CC12345 Academics Department) For PI Cost Centers, please indicate the Cost Center where the PI is permanently assigned.

NOTE: PI is Principle Investigator also referred to as Grant Manager in Workday. (Required)

- Division: Select the appropriate Division for the proposed IDC Cost Center - usually the Division associated with the Cost Center/College, or PI's Assigned Organization, entered above.

Division: Select the appropriate Division for the new Cost Center - usually the Division associated with the Cost Center/College, or PI's Assigned Organization, entered above.

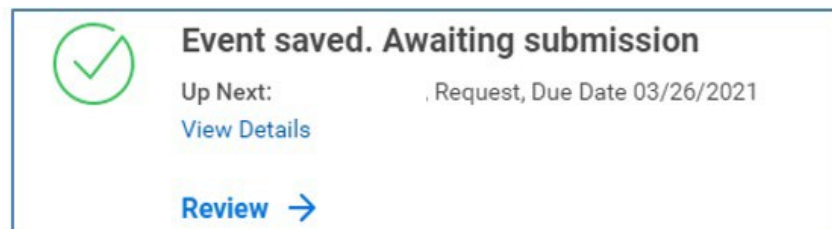
- **Effective Date:** From what date should this proposed IDC Cost Center worktag be valid. In most cases the date will be valid from the beginning of the fiscal year.

Effective Date: By what date is the proposed IDC Cost Center worktag needed?!

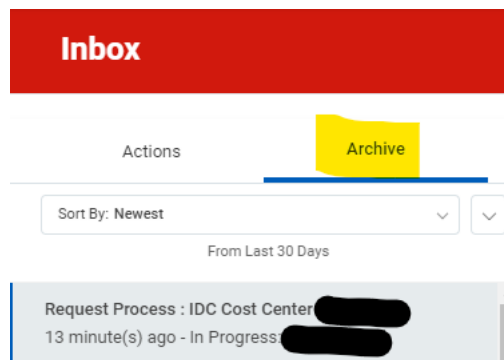
 

- **Comment:** The comment box may be used to provide any other information that may be useful for the creation of this IDC Cost Center. It may be viewed by all the approvers on the process.

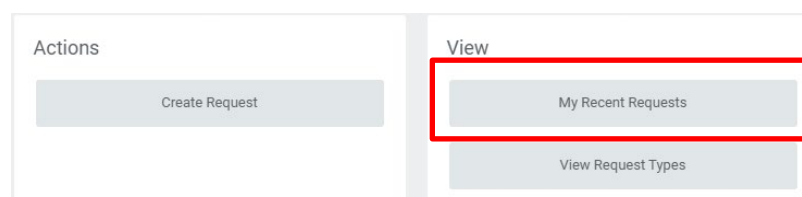
- 3) Click **Submit** to route the request for approval. There will be an error message if there are any unanswered questions. If so, enter 'N/A' into the text box and then click the Submit button again.
- 4) If **Save for Later** is selected, the request will be located in the Inbox where it can be selected and completed at a future point.



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



...Or in the worklet Requests.



...and from the related actions of the Request select Cancel.

View Event

Request Process : IDC Cost Center :

...

14 second(s) ago - In Progress: Jeanine Stroh

For

Request : IDC Cost Center :

...

Overall Process

Request Process : IDC Cost Center :

Overall Status

In Progress

Calendars In Use

Consecutive Days (No Calendars Selected)

Details

Process

Request

Request : IDC Cost Center

Request Type

IDC Cost Center

Request Date

10/26/2021 02:34:15.135 PM

Requester

Actions

Request

Business Process

Favorite

Request

Cancel

t : DC Cost Center :

Requester

Request Date

10/26/2021 02:34:15.135 PM

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 IDC Cost Center Request will be sent to the Approver's Inbox.

Review Request Process : IDC Cost Center : Linda Purn ...



18 minute(s) ago - Due 10/28/2021

This is an IDC Cost Center Request.

Grants often provide funds to cover University facilities and administration costs (also known as "F&A" or "indirect costs" or "overhead"). It is the University's policy to distribute a portion of this cost recovery to various levels within the University such as department, college, and Principal Investigator. These funds may be used to support future research and may not be used to compensate or train the PI.



2) Review the questions and answers of the questionnaire with emphasis on the related worktags and the personnel to be associated with or assigned as the proposed Cost Center Manager.

Question	Answers
Cost Center Name: Please use the following format when entering the Cost Center Name: 1. If this IDC Cost Center request is for a Department IDC Cost Center, or an IDC Cost Center for a Center, please spell out the entire name as it exists in Workday and add '- IDC' at the end (e.g. Academics Department - IDC or Center of Autism - IDC). 2. If this IDC Cost Center request is for a Principle Investigator (PI) IDC Cost Center, please use Last Name and First Initial of the PI and '- IDC' at the end (e.g. Doe J - IDC). NOTE: PI is Principle Investigator also referred to as Grant Manager in Workday.	test
Cost Center Manager: Provide first and last name, and title, for the employee who will be the Cost Center Manager for the proposed IDC Cost Center. If this is for a PI IDC Cost Center, the PI will be the Cost Center Manager. NOTE: If the employee for Cost Center Manager role does not have existing security access for Workday please complete the Request for Security Role form on the University website: https://www.montclair.edu/finance-and-treasury/wp-content/uploads/sites/158/2020/02/Workday-Security-Role-Request-Form_on-academic_02212020.pdf .	test
Is this Cost Center for Principal Investigator share of IDC?	No
Please provide the name and ID of the Cost Center which this proposed IDC Cost Center will roll up to (e.g. if this is for the IDC of the Academics Department then indicate: CC12345 Academics Department) For PI Cost Centers, please indicate the Cost Center where the PI is permanently assigned. NOTE: PI is Principle Investigator also referred to as Grant Manager in Workday.	test
Division: Select the appropriate Division for the new Cost Center - usually the Division associated with the Cost Center/College, or PI's Assigned Organization, entered above.	D29 Harry A. Sprague Library
Effective Date: By what date is the proposed IDC Cost Center worktag needed?	10/05/2021

3) Once the questionnaire is reviewed either:

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

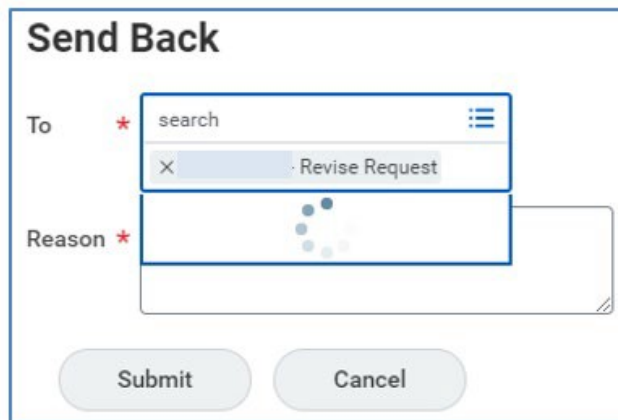
Approve

Send Back

Add Approvers

...

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



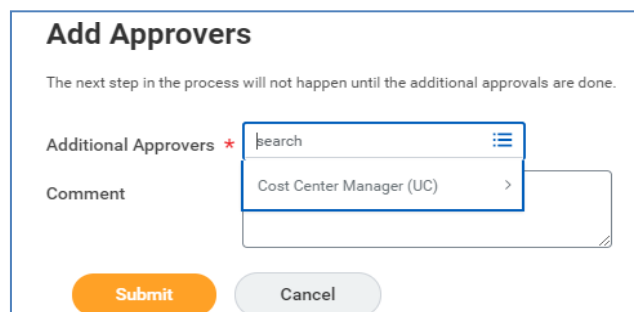
Send Back

To * 

Reason *



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



Add Approvers

The next step in the process will not happen until the additional approvals are done.

Additional Approvers * 

Comment



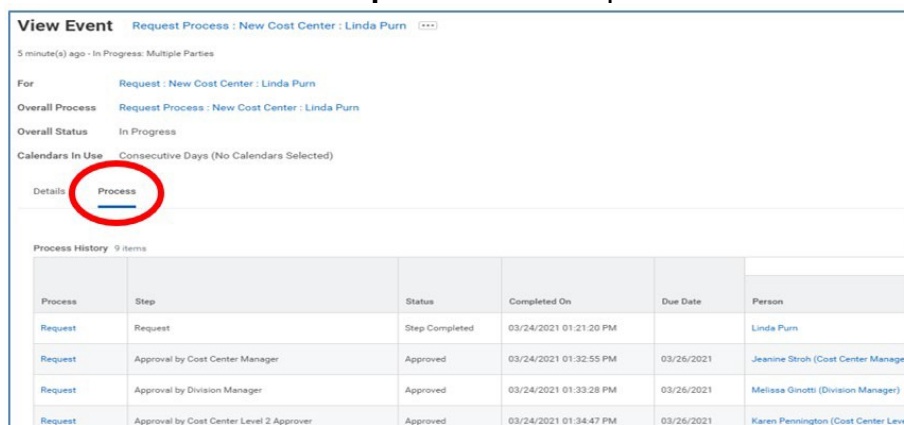
4) In order to follow up on the status of the request:

- 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.



View Event Request Process : New Cost Center : Linda Purn 

5 minute(s) ago · In Progress: Multiple Parties

For Request : New Cost Center : Linda Purn

Overall Process Request Process : New Cost Center : Linda Purn

Overall Status In Progress

Calendars In Use Consecutive Days (No Calendars Selected)

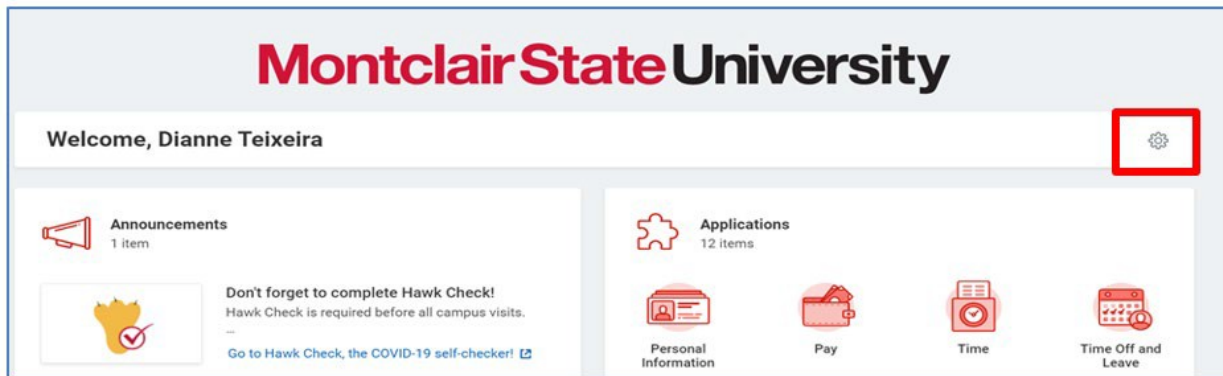
Details **Process**

Process History 9 items

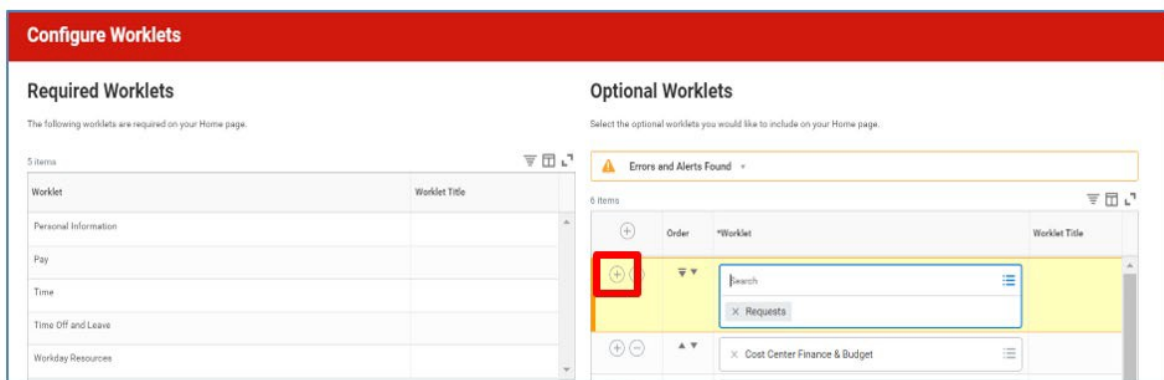
Process	Step	Status	Completed On	Due Date	Person
Request	Request	Step Completed	03/24/2021 01:21:20 PM		Linda Purn
Request	Approval by Cost Center Manager	Approved	03/24/2021 01:32:55 PM	03/26/2021	Jeanine Stroh (Cost Center Manager)
Request	Approval by Division Manager	Approved	03/24/2021 01:33:28 PM	03/26/2021	Melissa Gnocchi (Division Manager)
Request	Approval by Cost Center Level 2 Approver	Approved	03/24/2021 01:34:47 PM	03/26/2021	Karen Pennington (Cost Center Level 2 Approver)

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.

