

PI Review Costing Allocations & Grant

To View Costing Allocations (for Compensation)

The purpose of this document is to get the PI acclimated with their compensation allocations and accessing their award grant(s) in Workday. This document may be used in conjunction with other training materials; however, it is for information and view purposes **only**.

NOTE: The screenshots are based on the PI view. A business manager may use these directions but their screenshots will be slightly different, otherwise this document can be used by business manager to fine costing allocations.

- 1. Navigate to **Workday**
- 2. Click on user profile pic or icon; then, click, "View Profile"
- 3. A new screen will appear
- 4. On left side of the screen in blue area, click on "**Pay**" (you may have to scroll down to see option)
- 5. A new screen will appear with a Costing Allocations tab
- 6. Click tab

NOTE: An employee may not have any current or future allocations. To view all costing allocations including historical, go to page 3 of this document.





Default Organizational Assignments

A new screen is displayed with **Current and Future Costing Allocations** table.

Scroll left to right at the bottom of the table to view all columns

- 1. **Start Date** Date allocation started (can be hire or start date)
- 2. End Date Date allocation ended
- 3. Costing Allocation Level Worker Position
- 4. Position This is your job title with position number
- 5. Costing Company University of New Orleans
- 6. **Costing (As of Start Date)** These are the assigned Worktags from where your salary is paid
 - a. Cost Center Department/Institute
 - **Function** Job function (e.g., Academic Support, Research, Clinical Research, Equipment, Institutional Support, Instruction, Public Service, R&D Research, Training)
 - c. **Fund** Funding source (where the funds are coming from)
 - d. Worker Location University of New Orleans
- 7. **Distribution Percent** Percentage of work time allocated to each job function or assignment

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Start Date	End Date	Costing Allocation Level	Position	Costing Company	Costing (As of Start Date)	Distribution Percent
08/16/2016		Worker Position	PO litication stant Professor - s	University of New Orleans	Cost Center: 5700300000 Chemistry	75.00%
					Function: FNC009 Instruction Fund: FND019 Operating Fund	
					 Location: University of New Orleans 	
				University of New Orleans	Cost Center: 5700301000 Chemistry - Organized Research	25.00%
					Function: FNC016 Research	
					Fund: FND019 Operating Fund	
					Occation: University of New Orleans	

In the illustration above, the employee work time is distributed "75%" instruction (or teaching) and "25%" on research.



View All Costing Allocations for Worker

To view all or historical costing allocations, click **View All Costing Allocations** button.





View All Costing Allocations for Worker

All employee costing allocations will be displayed.

If you are paid salary from a grant, you will see the **Grant ID** and title in the **Costing (As of Start Date)** (column).

NOTE: If your costing/worktags are incorrect, please reach out to your college or department business manager as soon as possible. A correction with the Payroll Department will need to be initiated.

- You may have an **Earning** (column) in the table, this is determined by activity pay (e.g., supplemental pay)
 - Not everyone has this column
- Depending on your position, you may see **Position Restrictions** (column)
 - Not everyone has this column



If you are paid on a grant and would like to see additional information about the grant worktags, or the award, directions are provided on the next pages.

Save the grant numbers from your costing allocation before you move to the next pages.

Tip: On the Workday tab you can right click and select duplicate tab. This will let you keep the costing allocation page open and look up grant information at the same time.



To view grant(s) on an award

- 1. In the search bar at the top of the page type: "View Grant"
- 2. Click enter
- 3. New screen will appear with Tasks and Reports
- 4. Select, View Grant Report
- 5. New screen will appear to enter or select grant
- 6. In **Grant** search field, you may type in your grant ID number for the award or select **All Grants**, and choose the grant you want to review

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	GR10	3	



PI Review Costing Allocations & Grant

Grant Details

A new screen will appear.

Details (tab)

- 1. **Grant Name** Grant title or name
- 2. **Grant ID** Unique number assigned to your award grant used for spending (Previously known as a speedkey)
- 3. Include Grant ID in Name Yes (Disregard)
- 4. Inactive No (This is the grant's status in WD system)
- Include in Worktags assigned at hierarchy level for grant: department/institute, funding source, and grant reimbursement type (fixed price or cost reimbursable)
- 6. Exempt from Reprocess Award Costs No (Disregard)
- 7. **Usages** 1 (or can be any number)
 - a. This number represents the award(s) associated with the grant
 - b. Click hyperlinked number

Grant Name		Usages 1
Grant ID	GR101189	×
Include Grant ID in Na	ime Yes	
Inactive	No	
Included In	GRH1011 Advanced Materials Reseach Ins	
	GRH1104 UNO - Private	
	GRH1201 UNO - Fixed Price	
Exempt from Reproce	ess Award Costs No	



PI Review Costing Allocations & Grant

View Award

- 8. Fly-out box will appear. You will have the option to view the **Award** or **Award Line** details
 - a. Award (column) Click hyperlink for the award
 - b. You will be routed to the award **Overview** screen
 - i. Click Award Lines (tab)
 - ii. Click Award Lines (sub-tab)

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View Award Line Details

- iii. Scroll down page to Line Details (section) and you will see Grant
- iv. Click on the grant hyperlink

v. You will be routed back to the grant details screen







PI Review Costing Allocations & Grant

Award Line

To view Award Line details:

1. Click Usages hyperlink number. Fly out box will appear

2. **Award Line** (column) – Click hyperlink for the award line(s) you would like to review





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Related Worktags

You will be routed back to the grant details screen.

Click Related Worktags (tab)

Default Worktag (column)

- 1. **Cost Center** (row) PI department or institute
- 2. **Fund** (row) Funding source (e.g., Federal, Private, State, Local, Cost Share, or Internal)
- Function (row) Scope of project or purpose of work (e.g., Academic Support, Research, Clinical Research, Equipment, Institutional Support, Instruction, Public Service, R&D Research, Training)

NOTE: The **Worktag Type** (column) corresponds to the *Default Worktags* for the PI's award grant.

Details Related Worktag		•			
	gs Roles				
Grant Name					
Grant ID	GR1				
Include Grant ID in Name	Yes				
Inactive	No				
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Exempt from Reprocess Aw	vard Costs No				
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PI Review Costing Allocations & Grant

To view roles on grant

Roles (tab)

- 1. Click tab. The grant may have several users assigned with specific role access. These roles allow persons in various areas to view, edit, or approve grant activities.
- 2. The PI is assigned the **Grant Manager** role on the grant for budget management

NOTE: If you have any questions about your grant(s), please reach out to your assigned accountant in the Office of Research.

10 items		個声に
Assignable Role	Assigned To	Role From
	Carol Jean Mitton	Inherited
	Jesse Melton Sherrell	Inherited
Grant Financial Analyst	Kristy Askam	Inherited
	Johmyrin Joshua Johnson Joh Johnson	Inherited
	Steven G Johnson	Inherited
	Jennifer Tickle Nguyen	Inherited
Grant Manager		Assigned
Lead Principal Investigator		



CHANGES/UPDATES LIST:

Date	Pages Changed	Who made changes
L		<u> </u>