Assign Costing Allocation

Maintain the funding allocation for a position using the Assign Costing Allocation task. This task is also performed as a part of the Create Position business process.

The default fund for a position is identified when the position is created. You can identify one or more others to split funding, if necessary. The total funding distribution percentage must equal 100% if the split between one or more funds.

The procedure to assign funding allocations to a position follows.

Procedure:

1. Type the Supervisory Organization in the Search field.

2. Click on the search icon Q

3. Click the Supervisory Organization hyperlink.
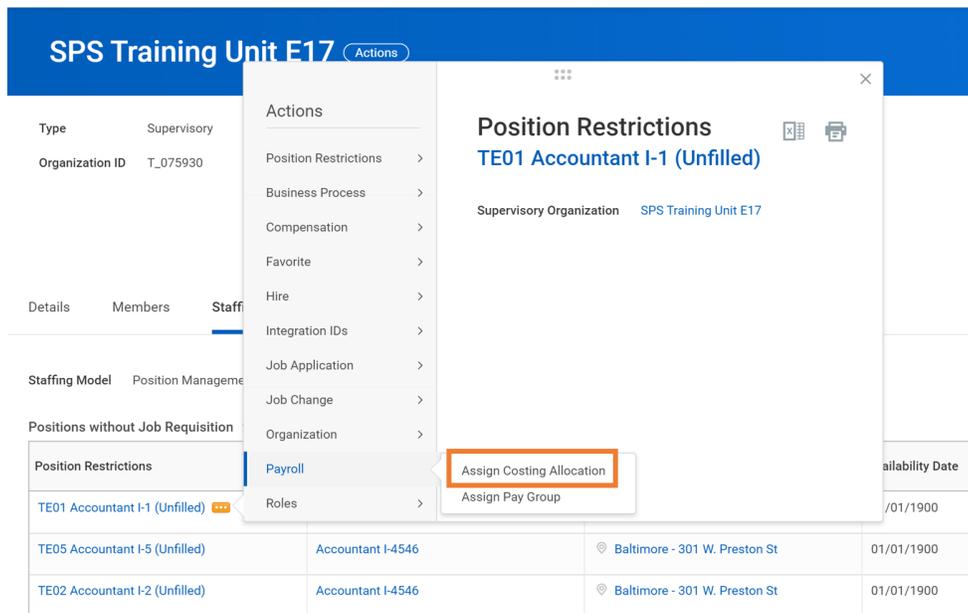
4. Identify the position you want to update.
5. Find the position you want to update, and then click on the Related Actions and Preview button next to the position.
6. In the menu, hover over Payroll and then click Assign Costing Allocation.

7. In the **Position Restrictions Costing** section, use the Calendar icon to update the Effective Date, if needed.

8. Click the **OK** [OK] button.

9. If the funding will end on a specified date, use the Calendar 🗓 icon to select the End Date.

10. To add one or more funds:

   a. Click the **Add a New Row** ⊕ icon in the costing allocation table.
   b. In the **Costing Override** column, type or use the prompt to select the appropriate fund.
   c. In the **Distribution Percent** column, type the distribution percent.
   d. Repeat, as needed.

   ℹ **Information**: More than one fund can be entered by adding additional rows. The fund information will come from Budget/Finance personnel. The Distribution Percent must add up to 100%.

11. Click the **Submit** [Submit] button.

Tip: If you do not want to submit the request at this point, you can also click one of the following buttons:

- Click **Save for Later** to save your changes but not submit.
- Click **Cancel** to cancel the process and start at another time.

Confirmation Page

14. Click the Done button.

15. The System Task is complete.