

Process New Worktag Request

***if you have multiple new worktags that need to be created, you can attach a worksheet to the request that identifies all of the requested worktags. In this case, in the fields for new worktag name, new worktag manager, and new worktag financial analyst, please note "See Attached." Do not create a request for each individual worktag.**

1. Create Request

The screenshot shows a 'Create Request' dialog box. At the top, it says 'Create Request'. Below that is a 'Request Type' dropdown menu with a red asterisk indicating it is required. At the bottom of the dialog are two buttons: 'OK' and 'Cancel'.

2. Identify what department that is making the request.

The screenshot shows a text input field labeled 'Department making the request (Required)'. The field is currently empty.

3. Select the type of worktag that you are requesting to be created. Note that if you select "Event" or "Program", a field for related Cost Center will appear.

The screenshot shows a section titled 'Select the New Worktag Type from the options below. (Required)'. It contains seven radio button options: Cost Center, Event (which is selected), Other Designated Balance, Program, Revenue Category, Spend Category, and VSA - Other Designated Balance. Below these options is a text input field labeled 'Related Cost Center'.

4. Enter the name of the new worktag, the new worktag manager, and any financial analysts for the new worktag. If requesting a Spend/Revenue Category, put N/A.

The screenshot shows three text input fields. The first is labeled 'New Worktag Name (Required)'. The second is labeled 'New Worktag Manager' and has a note below it: '*put N/A if requesting rev/spend cat (Required)'. The third is labeled 'New Worktag Financial Analyst (can be multiple employees)' and also has a note: '*put N/A if requesting rev/spend cat (Required)'.

5. Enter the effective date, the purpose for the new worktag being requested, and who is requesting the worktag.

Effective Date (Required)

MM/DD/YYYY

Purpose for New Worktag (Required)

Requested By (Required)

6. Attach backup supporting the change(s) that have been requested. The backup should contain an approval from the manager of the new worktags. In most cases, an e-mail correspondence is sufficient.

Please attach backup supporting your request (Required)

Drop files here

or

Select files