Phase I Workday Process Tasks Instructions

Overview

This guide contains instructions on how to complete the FY2025 Phase I Financial Planning and Budget Development Process Tasks using Workday.

Financial information has been provided in Workday for the completion of the 2025 Budget Development version. Workday Actuals reporting back to 2017 can be used to view and aid during the budget planning process.

In this phase each college/department will access the 2025 Budget Development version to enter all five priority requests. One line item in the "Phase I – Priority Pool Requests" sheet will be required for each priority request.

Note: Please do not reallocate during the request phase in Workday.

What to Expect: Step-by-Step

1 • How to access Workday Sheets

2 • Creating top five Budget Priority Requests

3 • Completing the Proposed Salary Allocation Sheet

4 • Completing the Proposed Tuition Rate Sheet (colleges only)

5 • Marking Tasks as Complete

Accessing Workday

Step 1: Go to: https://login.adaptiveinsights.com/app

Step 2: Enter username and password. By default, the Username will be your email address, and the **Password field should be left blank.** Click **'Sign In'**.

Username or Email *
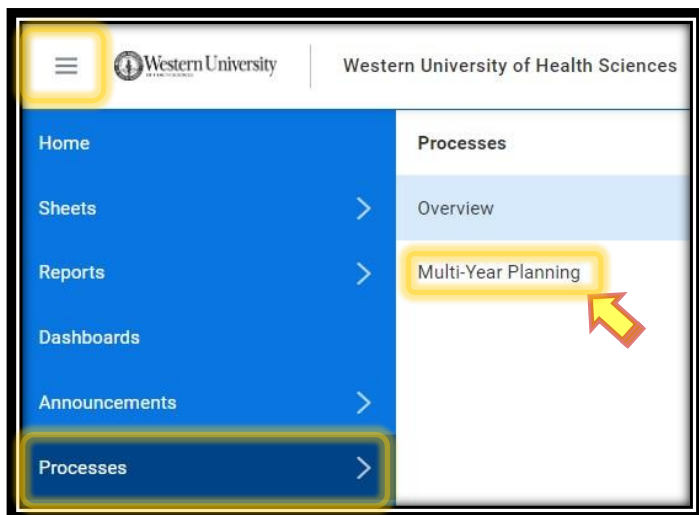
Password *

☐ Remember Username

Sign In

Forgot Password

Note: For all Login issues, please contact us at FP&A@westernu.edu

Accessing the Workday Sheets

Step 1: Click on the ≡ Icon at the Top left and then **'Processes'**. Click on **'Multi-Year Planning.'**

Step 2: Confirm selections for the Assigned to and Process lists:

Select **'Me'** from the Assigned To dropdown list. Select **'Multi-Year Planning'** from the Process dropdown list.

Step 3: All sheets assigned to you will be listed in the Tasks in Progress section.

The assigned tasks for the Phase I Budget Development process will include:
- Phase I – Budget Request
- Proposed Salary Pool Allocatin FY25
- Proposed Tuition Rate FY25 **(Colleges only)**

Note: The 'Process target date' and 'Final task due date' can be ignored.
However, the Due Date within each task is the True date of when the task needs to be completed.

Section I: Accessing the Budget Request Sheet

Step 1: Click on **'Phase I – Budget Request'** under the Tasks in Progress list.

Step 2: Read the Description provided on the left side of the sheet.

Section II: Creating Top Five Priorities

**Step 1:** Click the **'Add Row'** button towards the top of the screen.
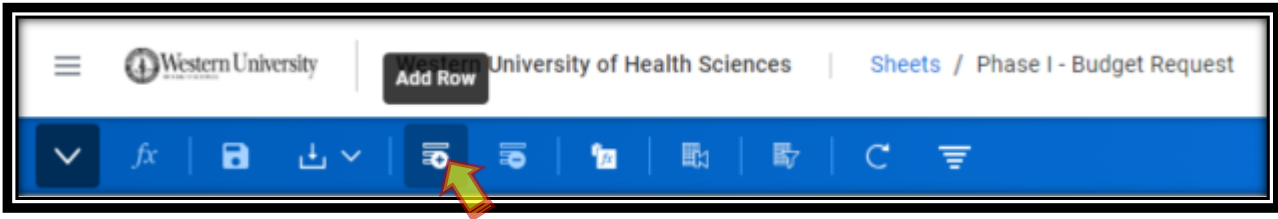
Step 2: Input the Acct #, Requested Amount, Effective Date, and Priority Ranking. Indicate if there is a history of deficit in the account, whether the request is a one-time or ongoing need, and add a short rationale.
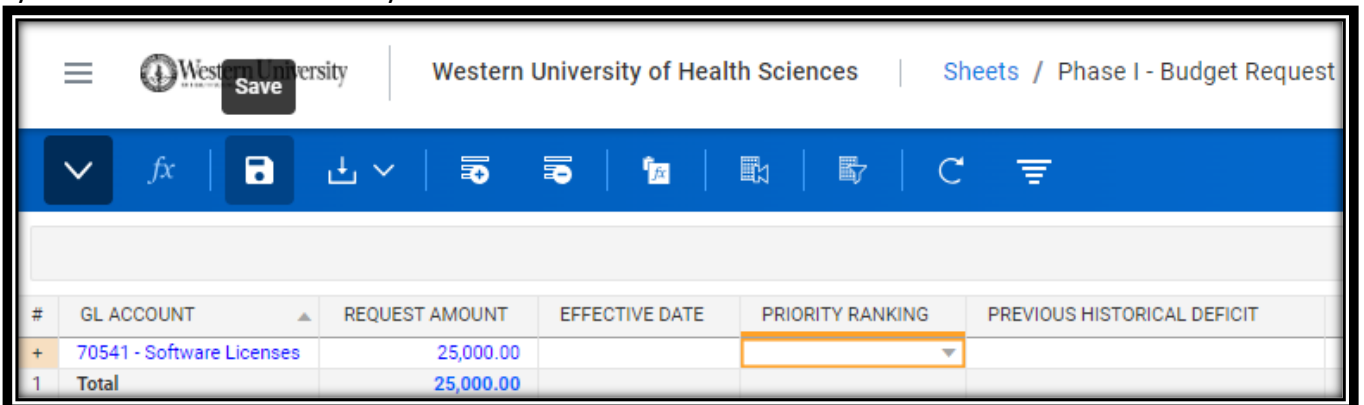

By hovering over a cell, a small arrow icon will appear. Clicking on it will open a window in which you can search for an account number by its title.
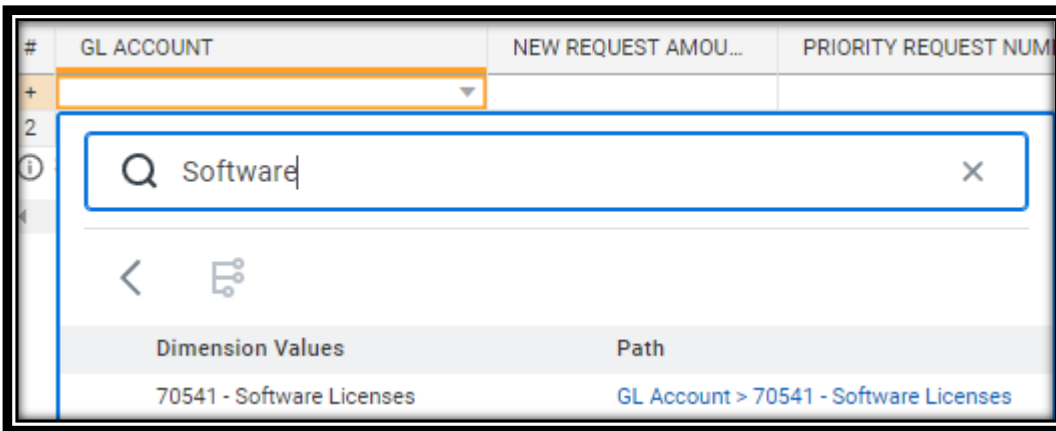
Step 3: Click on the Save icon to save your work. We recommend doing this frequently, as the system does not automatically save.

Step 4:   Repeat Steps 1 and 2 until up to five requests have been inputted.

#	GL ACCOUNT	REQUEST AMOUNT	EFFECTIVE DATE	PRIORITY RANKING	PREVIOUS HISTORICAL DEFICIT	FUNDING TY...	SHORT RATIONALE/JUSTIFICATION
1	70541 - Software Licenses	25,000.00	7/1/2024	1 - highest level	Yes	Ongoing	New anticipated software for classroo...
+	7160 - Utilities	30,000.00	7/1/2024	2 - second highest le...	Yes	Ongoing	Utilities have gone up historical and will...
+	7920 - Equipment	10,000.00	1/1/2025	3 - middle level	No	One-time	New surgical equipment for student pra...
+	70970 - Repairs and Maint...	5,000.00	7/1/2024	4 - second lowest lev...	No	Ongoing	New repairs contract
+	72000 - COGS	45,000.00	7/1/2024	5 - lowest level	Yes	Ongoing	COGS exceeds revenue levels
2	**Total**	**115,000.00**					

Step 5:   If any additional notes are necessary, click the [icon] icon at the top right of the window to add them.

Sheet Notes

Enter Note

OK   Cancel

If additional files are to be included as backup documentation, please save such files into the shared W drive.

Step 6:   Once reviewed and completed, click on the Save icon again. The text should change from blue to black font.

Western University   Save   Western University of Health Sciences   Sheets / Phase I - Budget Request

#	GL ACCOUNT	REQUEST AMOUNT	EFFECTIVE DATE	PRIORITY RANKING	PREVIOUS HISTORICAL DEFICIT	FUNDING TY...	SHORT RATIONALE/JUSTIFICATION
1	70541 - Software Licenses	25,000.00	7/1/2024	1 - highest level	Yes	Ongoing	New anticipated software for classroo...
2	70970 - Repairs and Maint...	5,000.00	7/1/2024	4 - second lowest lev...	No	Ongoing	New repairs contract
3	7160 - Utilities	30,000.00	7/1/2024	2 - second highest le...	Yes	Ongoing	Utilities have gone up historical and will...
4	72000 - COGS	45,000.00	7/1/2024	5 - lowest level	Yes	Ongoing	COGS exceeds revenue levels
5	7920 - Equipment	10,000.00	1/1/2025	3 - middle level	No	One-time	New surgical equipment for student pra...
6	**Total**	**115,000.00**					

Section III: Accessing the Proposed Salary Pool Allocation Sheet

Step 1: Click on **'Proposed Salary Pool Allocation FY25'** under the Tasks in Progress list.

Step 2: Read the Description provided on the left side of the sheet.

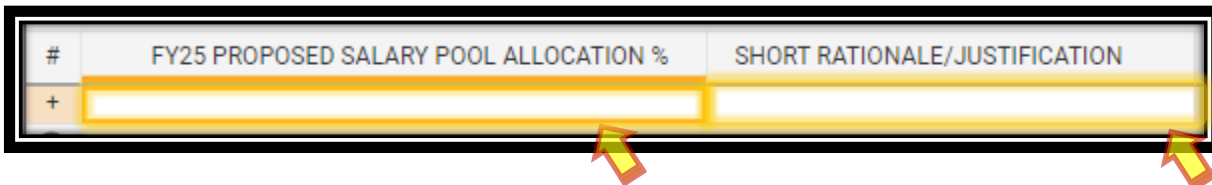# Section IV: Completing the Proposed Salary Pool Allocation Sheet

Step 1:   Select your **'Home Org'** from the Levels dropdown list.
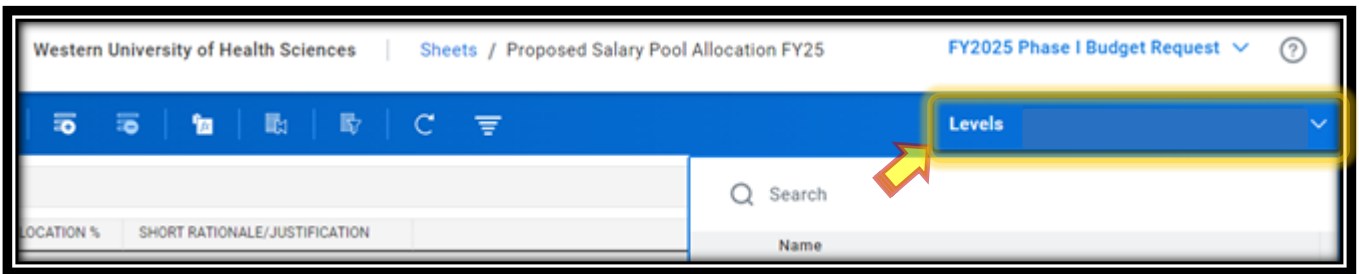
**Step 2:**   Click the **'Add Row'** button towards the top of the screen.

Step 3:   Input the salary pool allocation percentage and a rationale in each corresponding column.

Click on a cell to input information.

Note: You do not need to include the "%" when entering a rate (number) into the FY25 Proposed Salary Pool Allocation % field.

Step 4: If any additional notes are necessary, click the icon at the top right of the window to add them. Click **'OK'** when done.
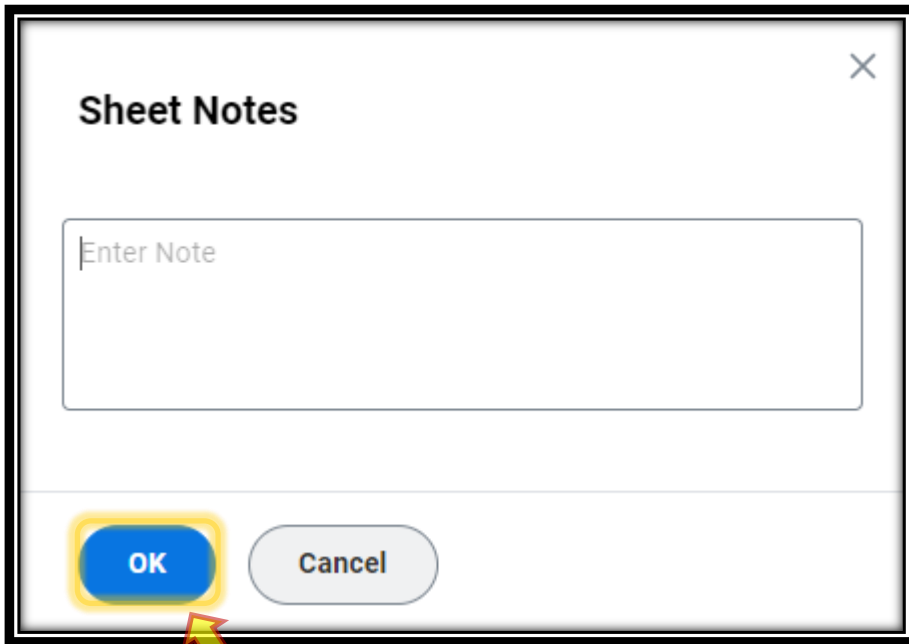
If additional files are to be included as backup documentation, please save such files into the shared W drive.

Step 5: Once reviewed and completed, click on the **'Save'** icon again.
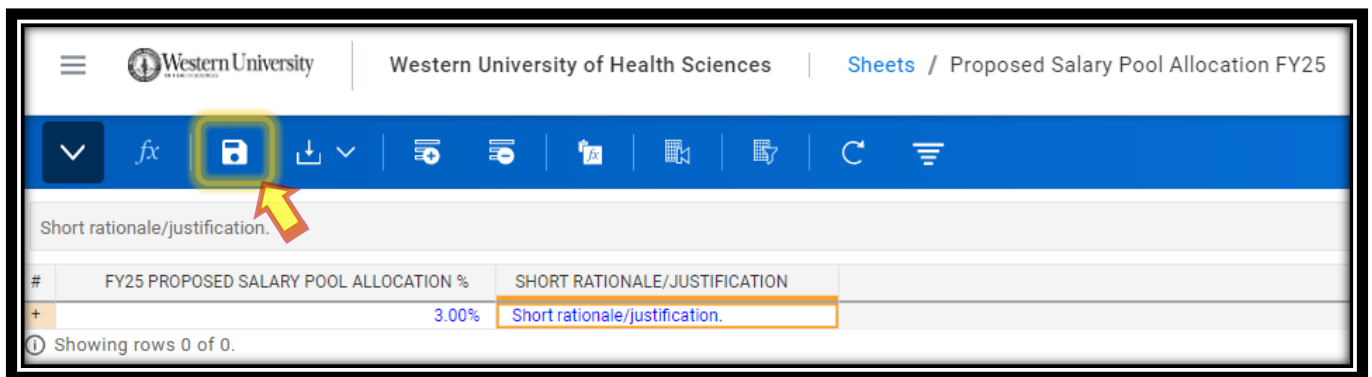
The text should change from blue to black font.
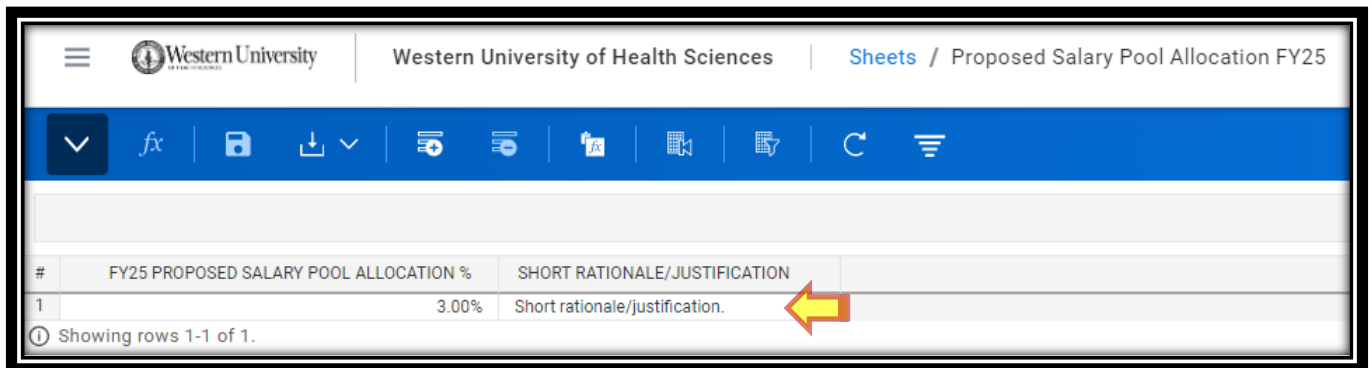
Section V: Accessing Proposed Tuition Rate Sheet

Step 1: Click on **'Proposed Tuition Rate FY25'** under the Tasks in Progress list.
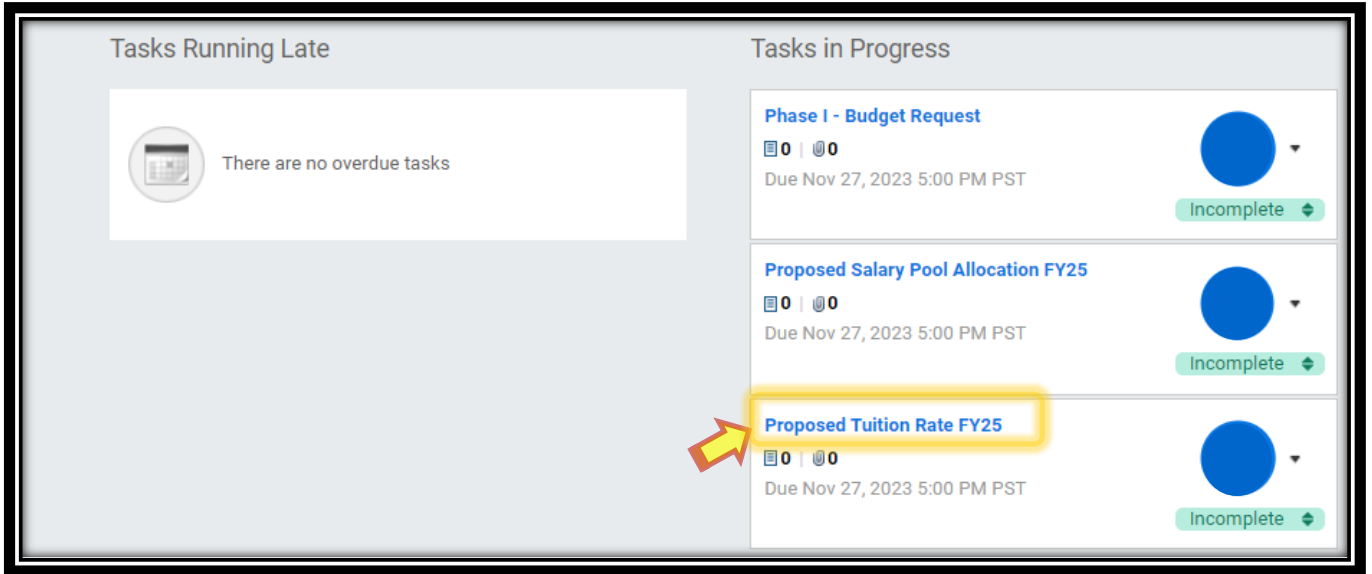
Step 2: Read the Description provided on the left side of the sheet.
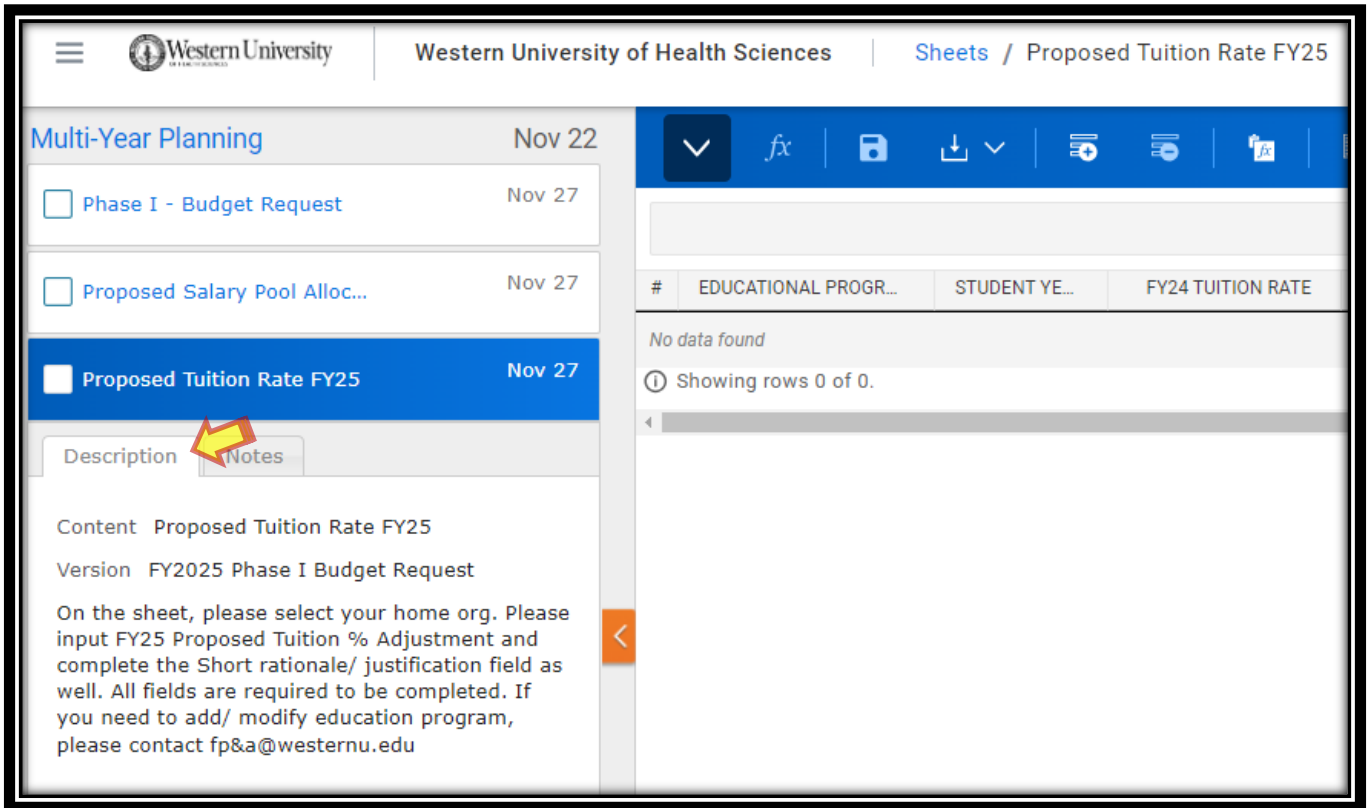
Section VI: Completing the Proposed Tuition Rate Sheet

Step 1: Select your **'Home Org'** from the Levels dropdown list.
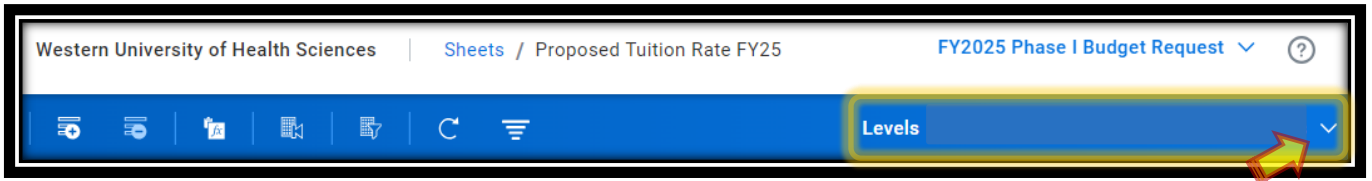
Note: The Educational Program, Student Year, FY24 Tuition Rate and FY25 New Tuition Rate fields will automatically populate information based on current data.

Step 2: Click on the cell to input your FY25 Proposed Tuition % Adjustment rate and complete the Short Rationale/Justification field. Once this has been completed, click on the Save icon and the new tuition rate will be automatically calculated.

Note: You do not need to include the "%" when entering a number into the FY25 Proposed Tuition % Adjustment field.

Step 3: If any additional notes are necessary, click the icon at the top right of the window to add them. Click OK when done.
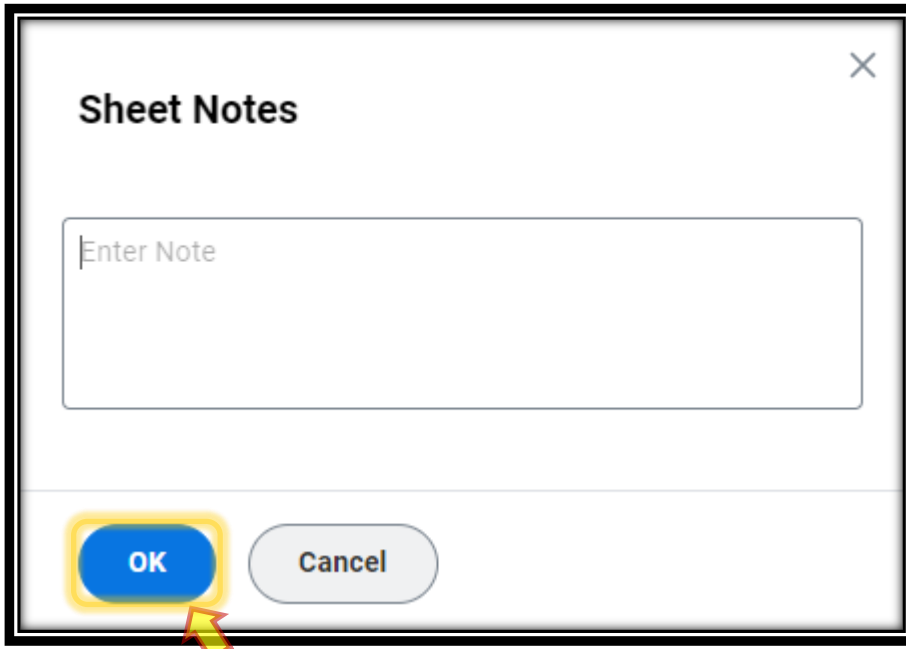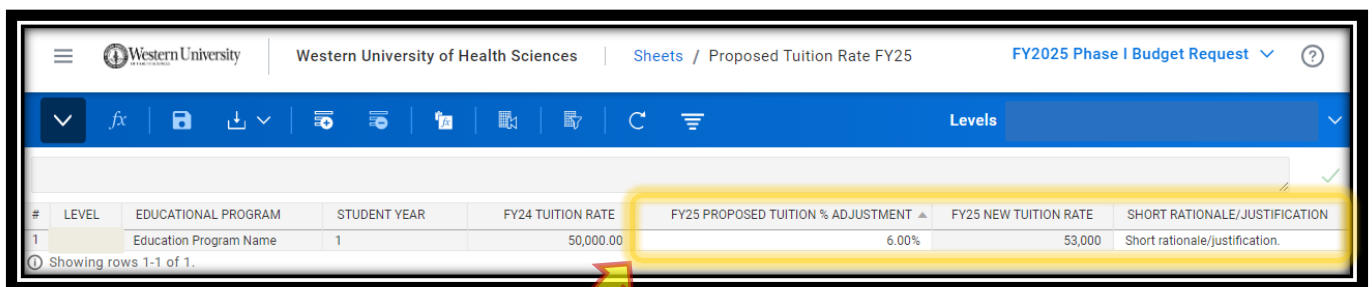

If additional files are to be included as backup documentation, please save such files into the shared W drive.

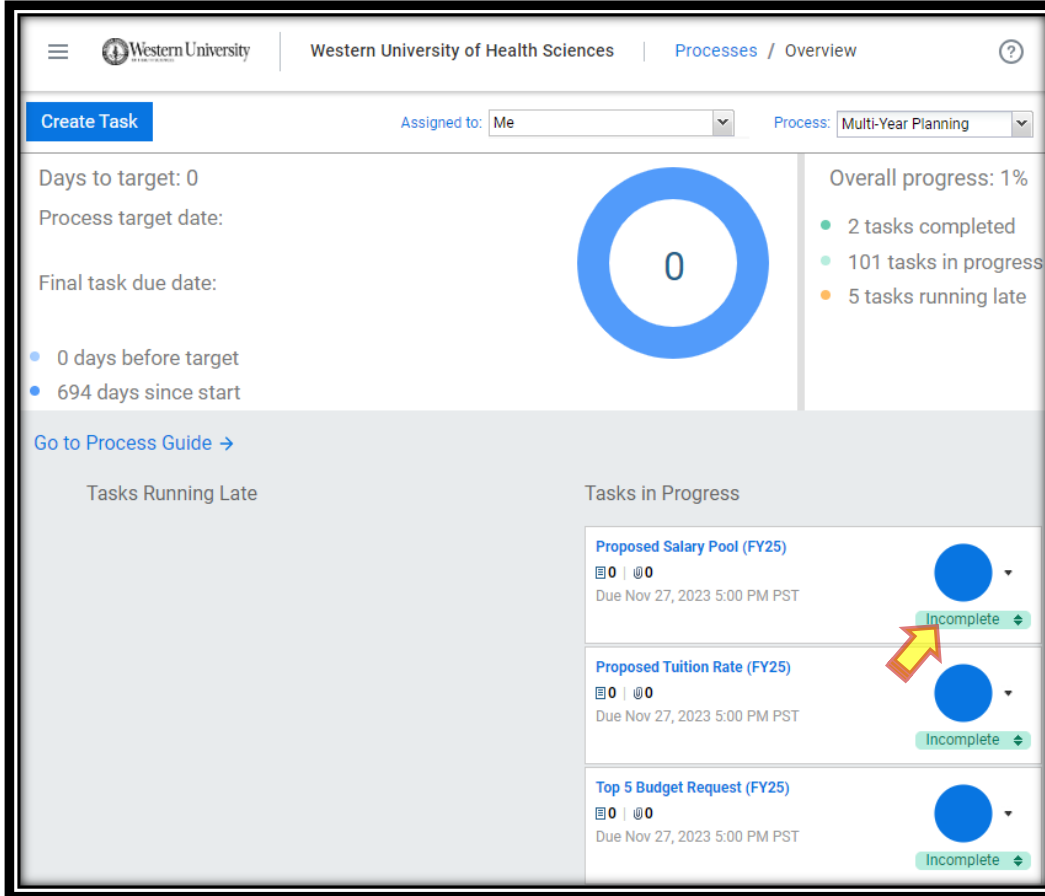**Step 4:** Once reviewed and completed, click on the Save icon again.
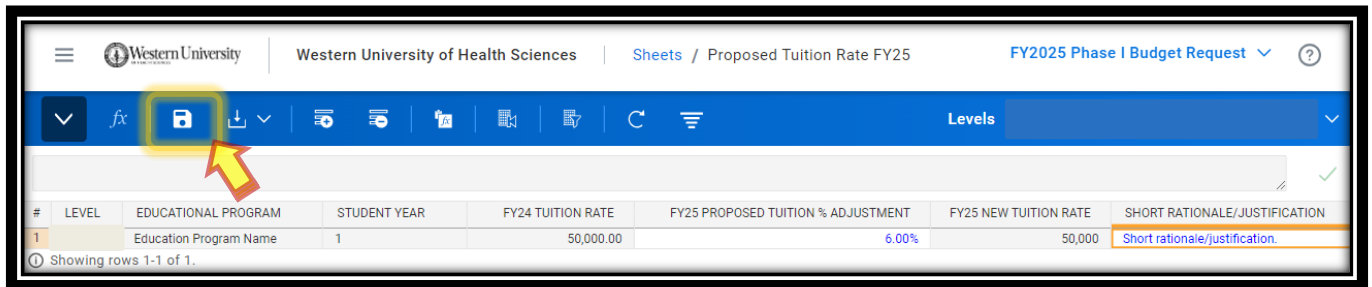
The text should change from blue to black font and the FY25 New Tuition Rate should adjust.
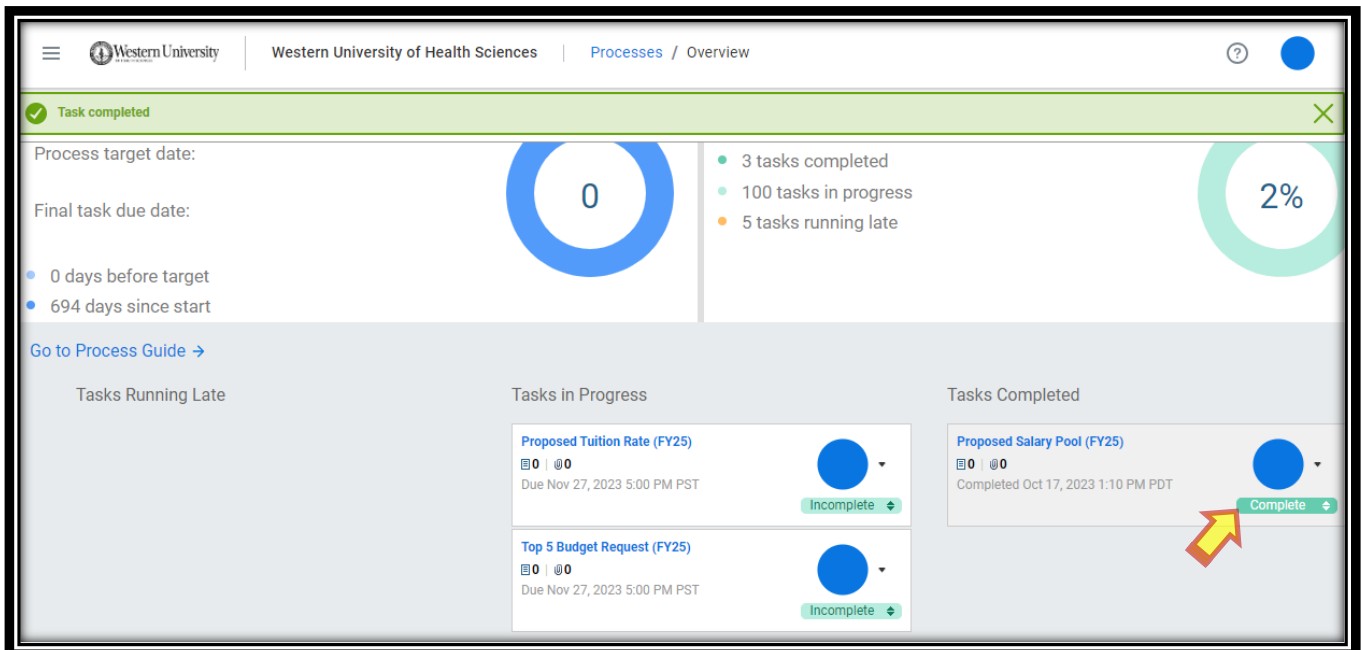
Section VI: Marking Tasks as Completed in Workday

Step 1: Repeat the steps to access the 'Processes' page in Workday to view all Tasks.

Step 2: Click on the 'Incomplete' button to mark a Task as completed.

The Completed Task will move over to the 'Tasks Completed' column.