Phase I Workday Process Tasks Instructions

Overview

This guide contains instructions on how to complete the FY2026 Phase I Financial Planning and Budget Development Process Tasks using Workday.

Financial information has been provided in Workday for the completion of the 2026 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 2026 Budget Development version to enter all five priority requests. One line item in the "Phase I – Budget Request" 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 Strategic Budget Prority Requests
3	• Completing the Proposed Salary Increase 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'**.
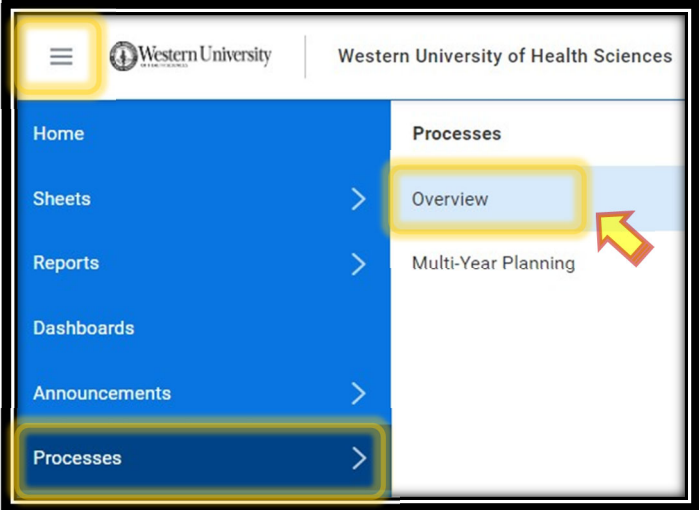

Note: For all Login issues, please contact us at FP&A@westernu.edu

Accessing the Workday Sheets

Step 1: Click on the ☰ Icon at the Top left and then **'Processes'**. Click on **'Overview.'**

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:
- Top 5 Strategic Budget Requests
- Proposed Salary Increase Allocation
- Proposed Tuition Rate **(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 **'Top 5 Strategic Budget Requests'** 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.
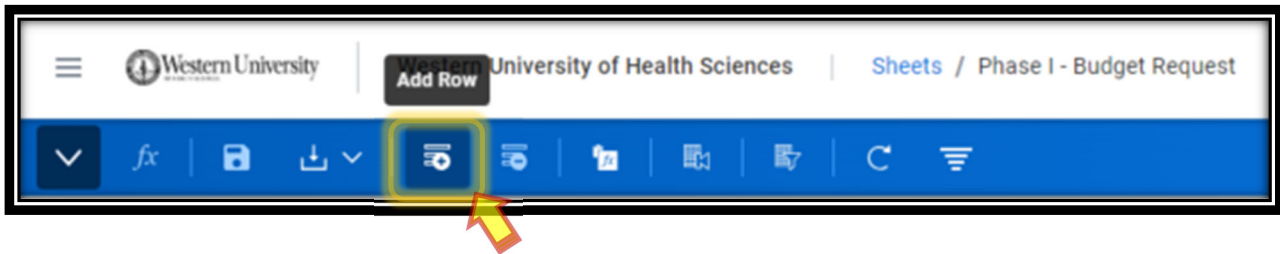
Step 2: Input the Acct #, Requested Amount, Effective Date, and Priority Ranking. Indicate whether the request is a one-time or ongoing need, provide a compensation analysis reference # (new positions & position modifications only). Confirm request has been included on projection, incidate the primary strategic theme and secondary strategic theme (optional) and provide a short rationale/justification.
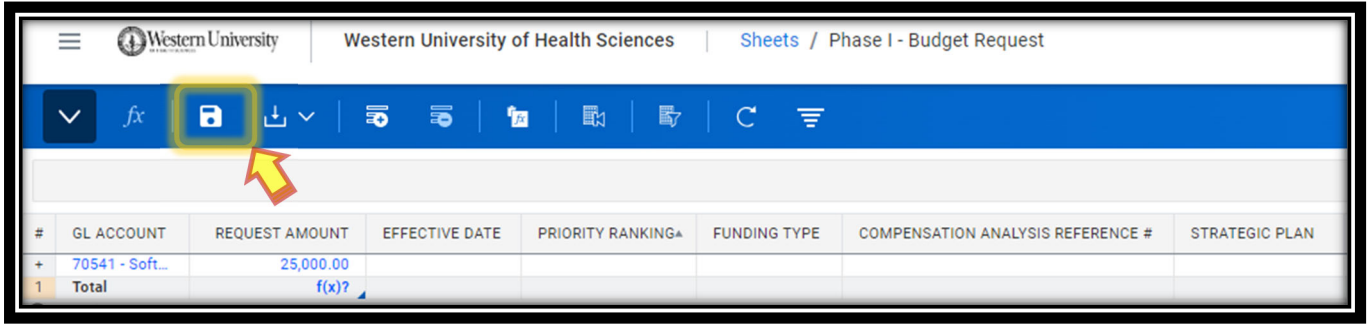
Note: Compensation Analysis Reference # will be provided by HR/Compensation, via email.

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.
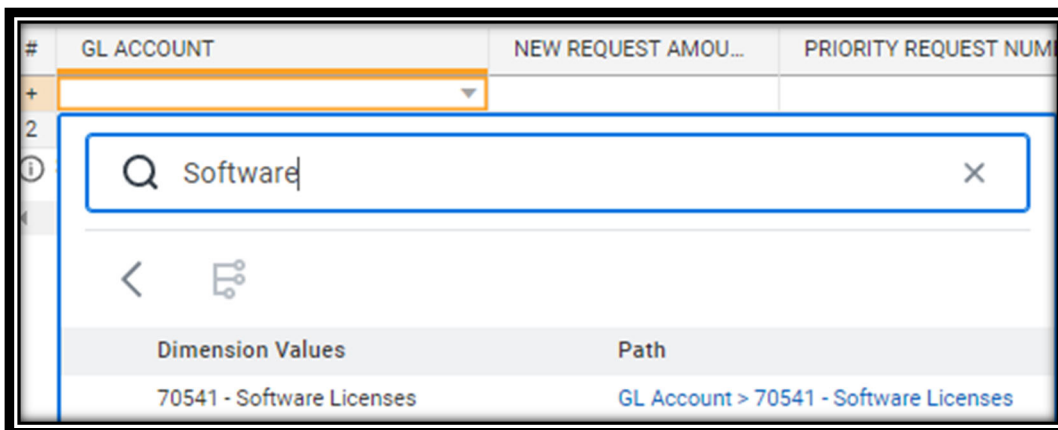
Step 3: Click on the Save icon to save your work. We recommend doing this frequently, as the system does not automatically save.

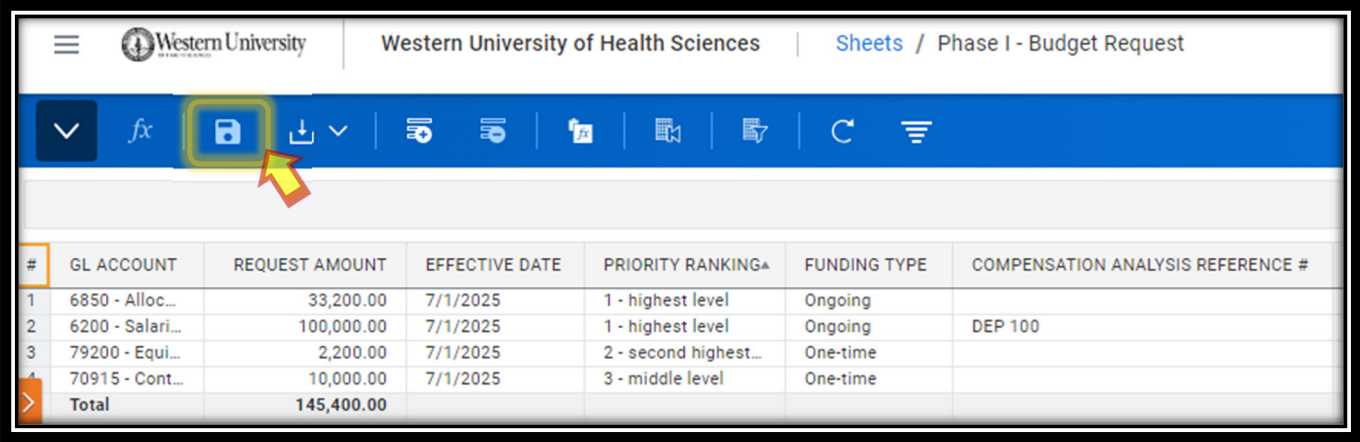**Step 4:** Repeat Steps 1 and 2 until up to five requests have been inputted.

#	GL ACCOUNT	REQUEST AMOUNT	EFFECTIVE DATE	PRIORITY RANKING▲	FUNDING TYPE	COMPENSATION ANALYSIS REFERENCE #	STRATEGIC PLAN	PRIMARY STRATEGIC THEME
1	6850 - Alloc...	33,200.00	7/1/2025	1 - highest level	Ongoing		Included on Projection	Operational Excellence
2	6200 - Salari...	100,000.00	7/1/2025	1 - highest level	Ongoing	DEP 100	Included on Projection	Operational Excellence
3	79200 - Equi...	2,200.00	7/1/2025	2 - second highest...	One-time		Included on Projection	Operational Excellence
4	70915 - Cont...	10,000.00	7/1/2025	3 - middle level	One-time		Included on Projection	Operational Excellence
	Total	145,400.00						

Step 5: If any additional notes are necessary, click the [+] icon at the top right of the window to add them.
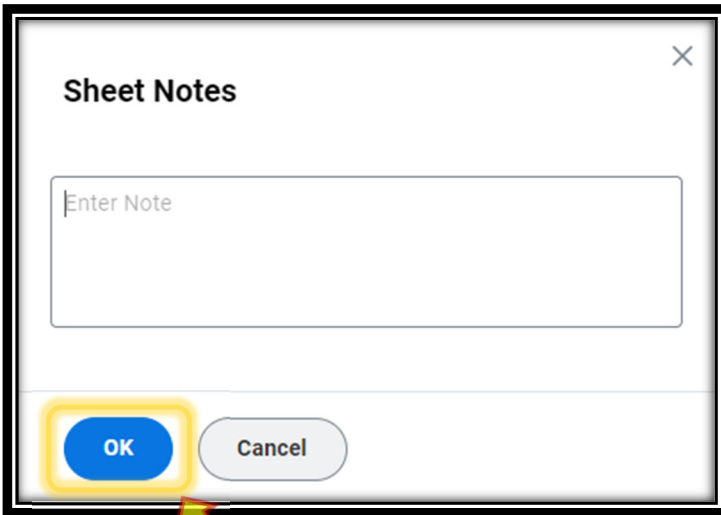
If additional files are to be included as backup documentation, please save such files into the shared W drive.

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

#	GL ACCOUNT	REQUEST AMOUNT	EFFECTIVE DATE	PRIORITY RANKING▲	FUNDING TYPE	COMPENSATION ANALYSIS REFERENCE #
1	6850 - Alloc...	33,200.00	7/1/2025	1 - highest level	Ongoing	
2	6200 - Salari...	100,000.00	7/1/2025	1 - highest level	Ongoing	DEP 100
3	79200 - Equi...	2,200.00	7/1/2025	2 - second highest...	One-time	
4	70915 - Cont...	10,000.00	7/1/2025	3 - middle level	One-time	
	Total	**145,400.00**				

Section III: Accessing the Proposed Salary Increase Allocation Sheet

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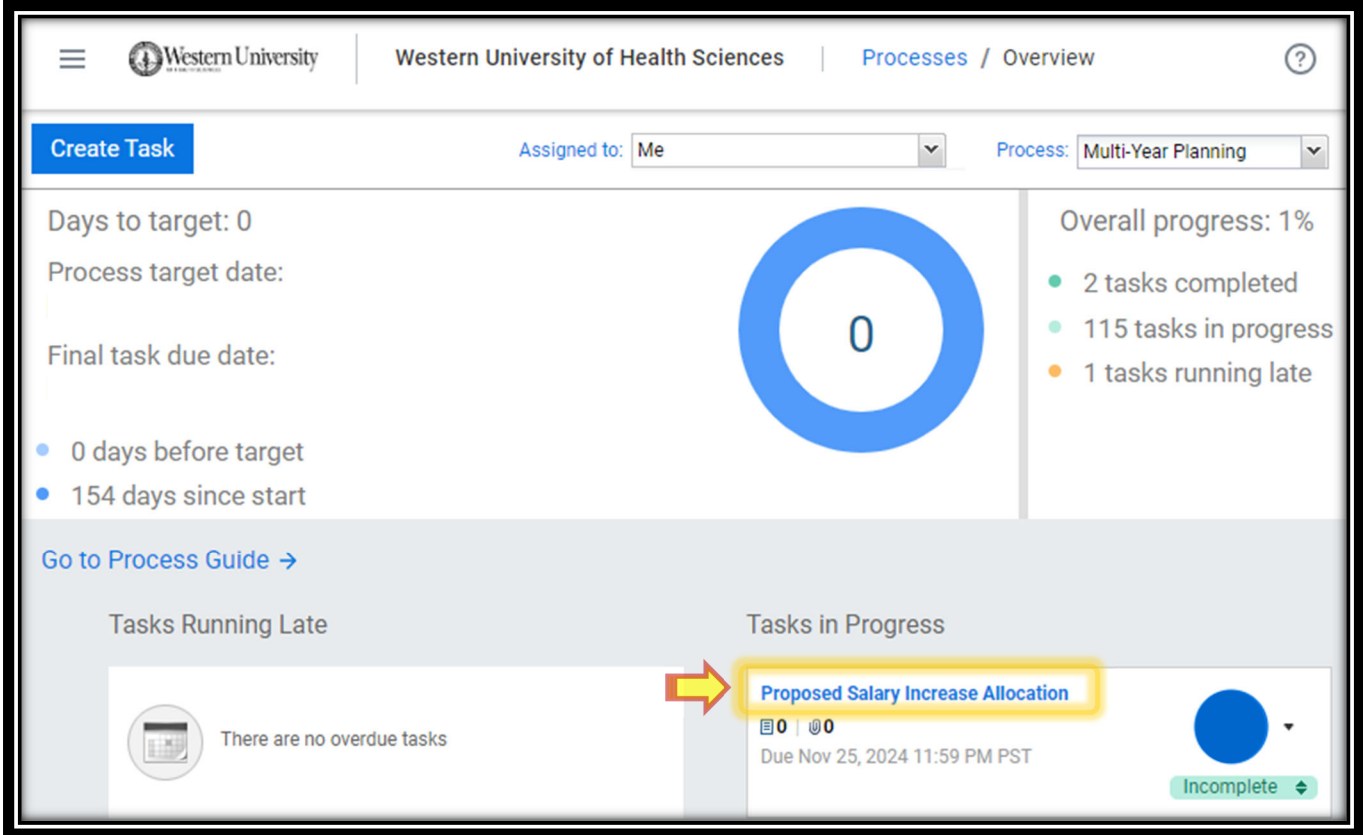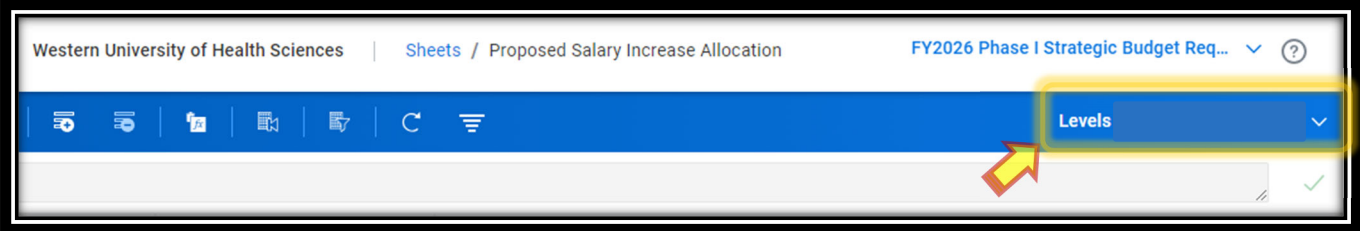

Step 2: Read the Description provided on the left side of the sheet.
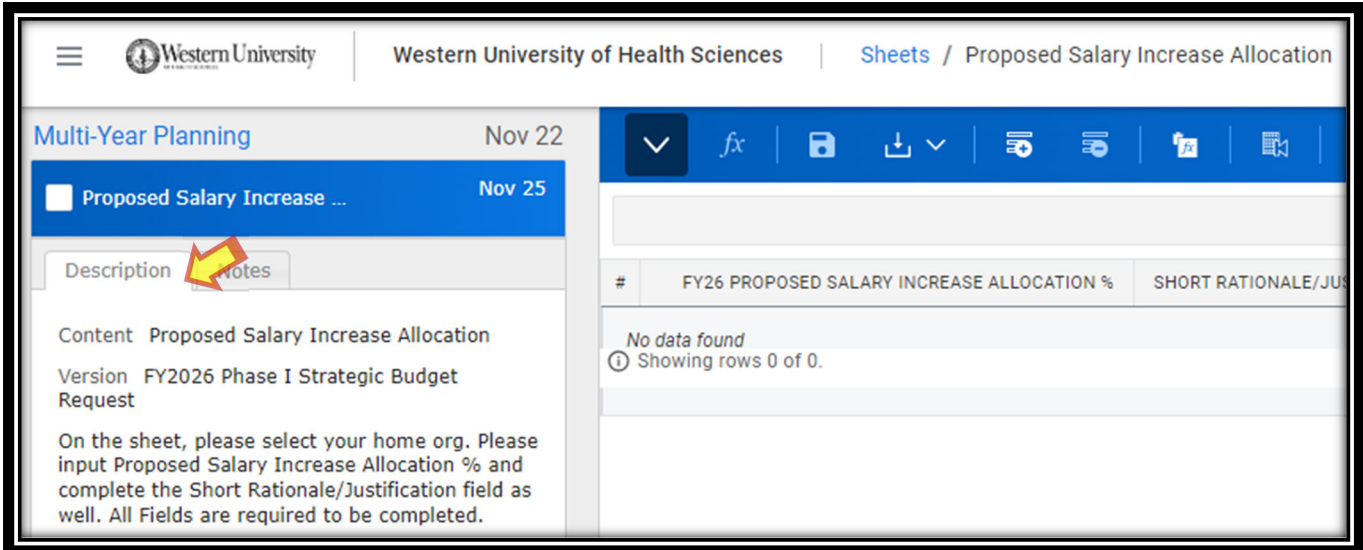
Section IV: Completing the Proposed Salary Increase Allocation Sheet

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 increase 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 FY26 Proposed Salary Increase 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.
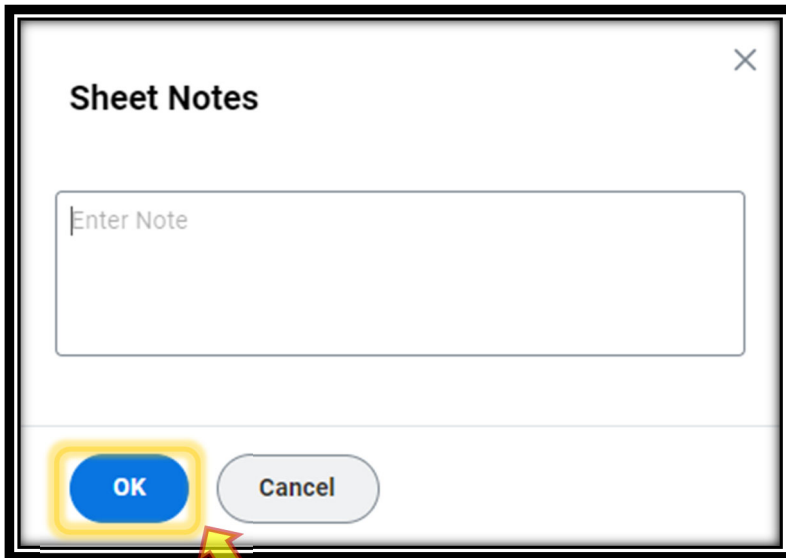
If additional files are to be included as backup documentation, please save such files into the shared W drive.

Step 5: Once reviewed and completed, click on the **'Save'** icon again.
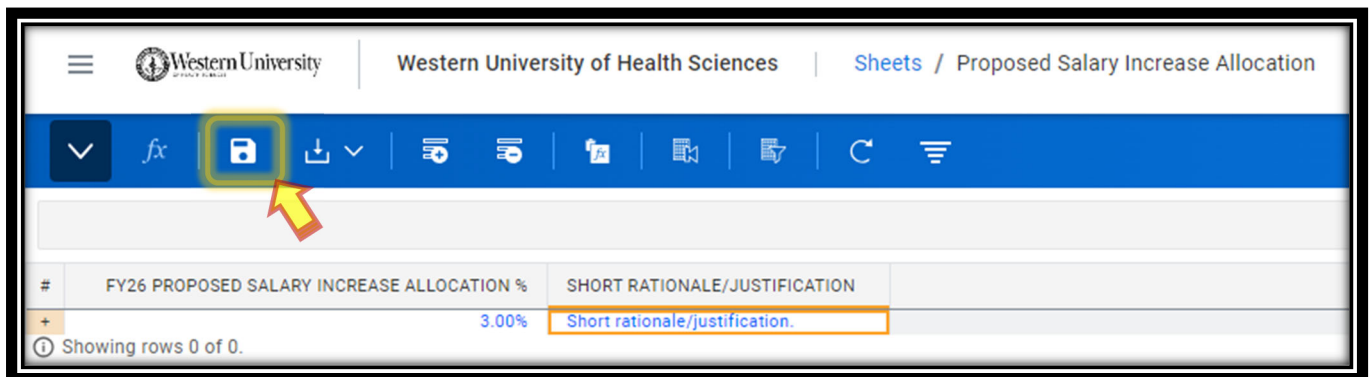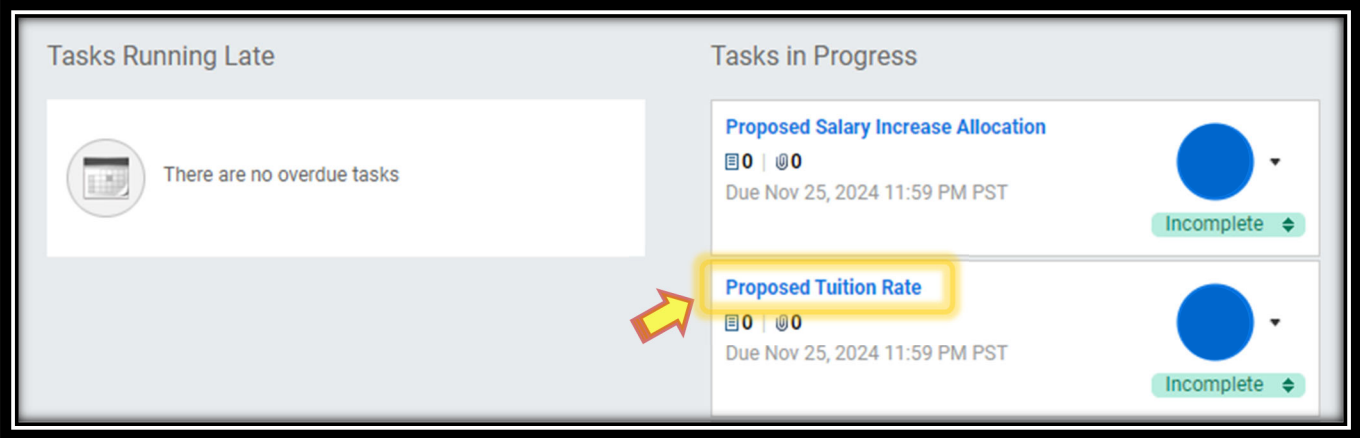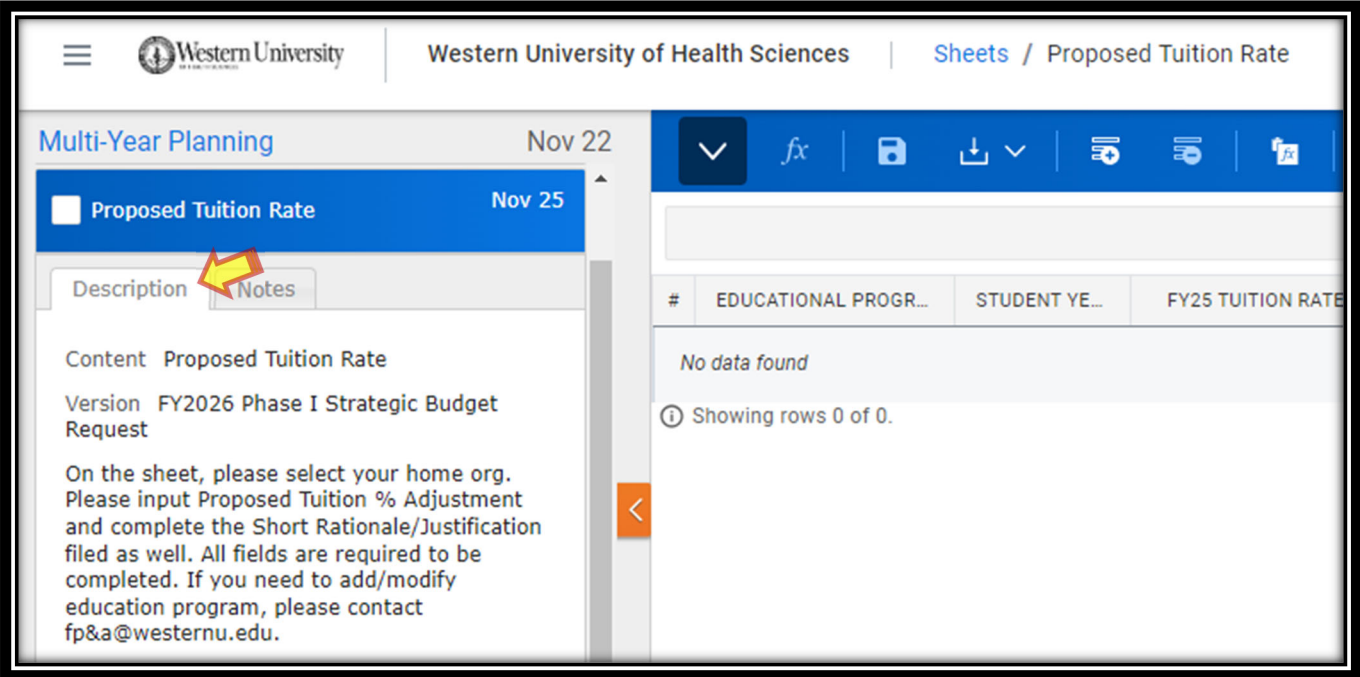

The text should change from blue to black font.

Section V: Accessing Proposed Tuition Rate Sheet

Step 1: Click on **'Proposed Tuition Rate'** 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.
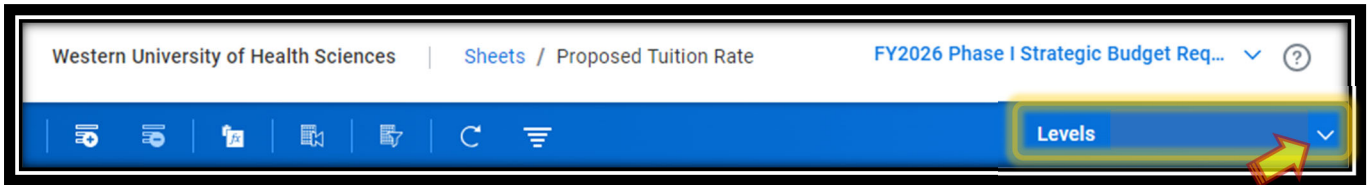
Note: The Educational Program, Student Year, FY25 Tuition Rate and FY26 New Tuition Rate fields will automatically populate information based on current data.


Step 2: Click on the cell to input your FY26 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 FY26 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.
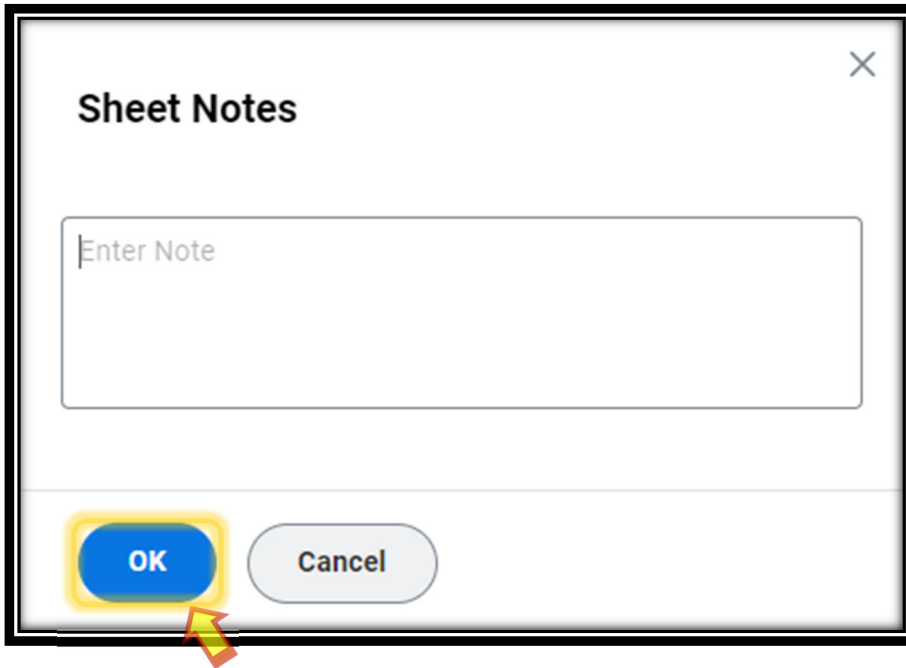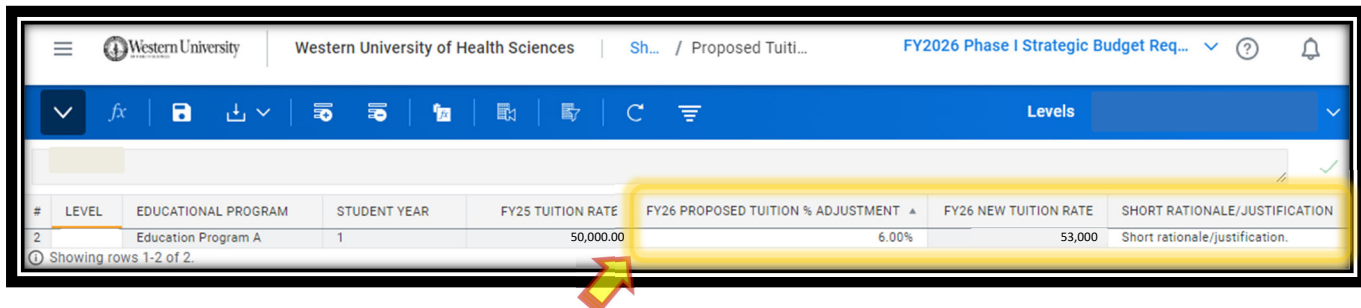

If additional files are to be included as backup documentation, please save such files into the shared W drive.

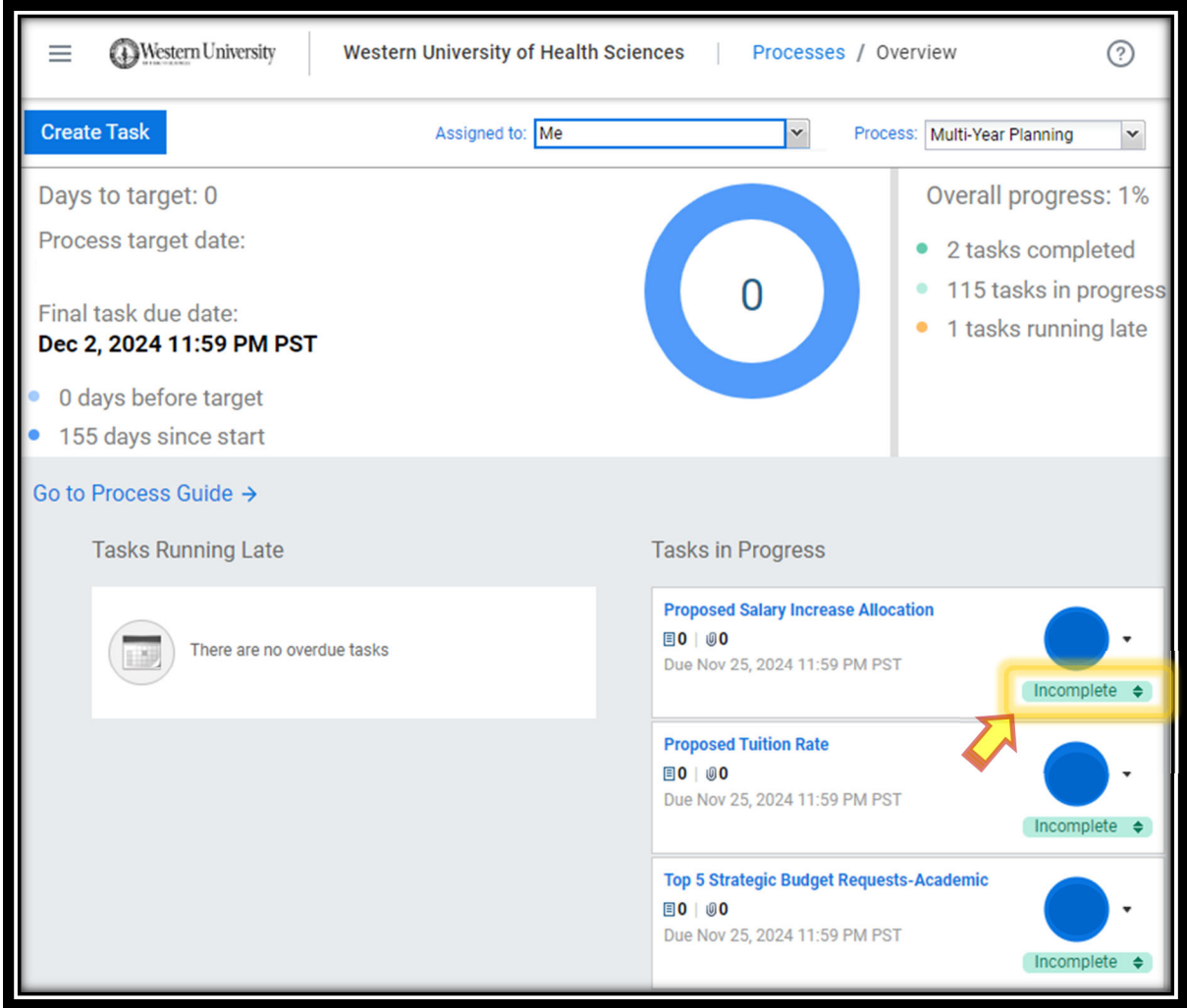**Step 4:** Once reviewed and completed, click on the Save icon again.
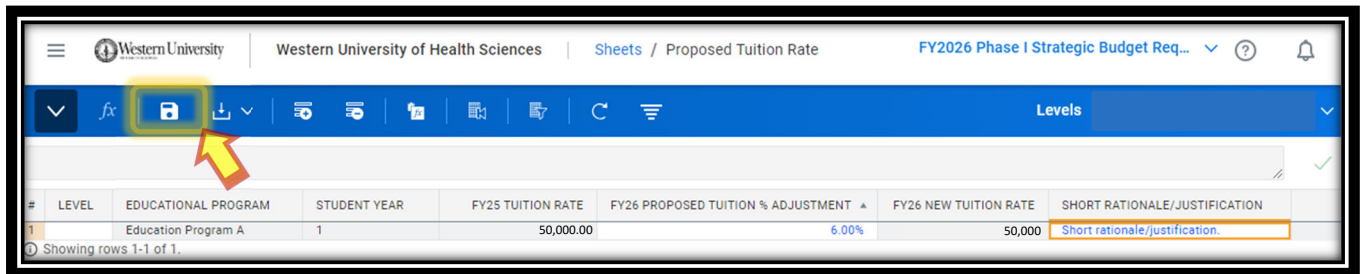
The text should change from blue to black font and the FY26 New Tuition Rate should adjust.

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.