

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

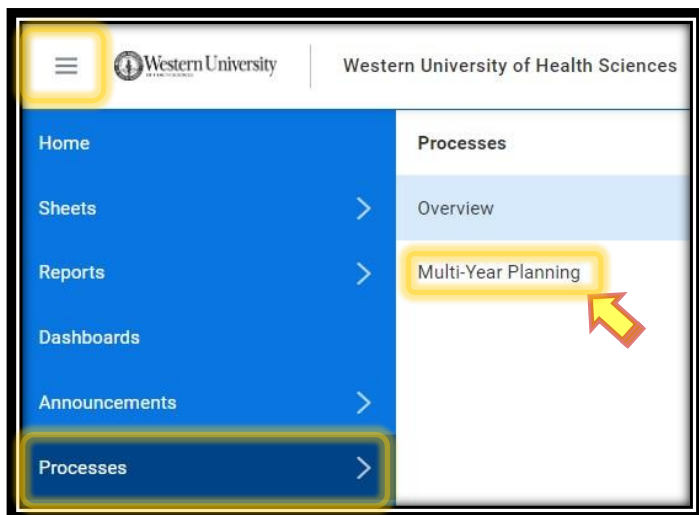
Sign In

[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.

Western University of Health Sciences | Processes / Overview

Create Task | Assigned to: Me | Process: Multi-Year Planning

Days to target: 0
Process target date:
Final task due date:

0 days before target
693 days since start

Overall progress: 3%

- 2 tasks completed
- 60 tasks in progress
- 3 tasks running late

Go to Process Guide →

Tasks Running Late: There are no overdue tasks

Tasks in Progress:

- Phase I - Budget Request (Due Nov 27, 2023 5:00 PM PST) - Incomplete
- Proposed Salary Pool Allocation FY25 (Due Nov 27, 2023 5:00 PM PST) - Incomplete
- Proposed Tuition Rate FY25 (Due Nov 27, 2023 5:00 PM PST) - Incomplete

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.

The dashboard displays the following information:

- Days to target:** 0
- Process target date:** (indicated by a red arrow)
- Final task due date:** (indicated by a red arrow)
- Overall progress:** 3%
- Task Status Summary:**
 - 2 tasks completed
 - 60 tasks in progress
 - 3 tasks running late
- 0 days before target**
- 693 days since start**

[Go to Process Guide →](#)

Tasks Running Late | **Tasks in Progress**

Tasks Running Late: There are no overdue tasks.

Tasks in Progress: Phase I - Budget Request

- Due Nov 27, 2023 5:00 PM PST (highlighted with a red arrow)
- Status: Incomplete

Section I: Accessing the Budget Request Sheet

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

Western University | Western University of Health Sciences | Processes / Overview

Create Task | Assigned to: Me | Process: Multi-Year Planning

Days to target: 0
 Process target date:
 Final task due date:

Overall progress: 3%

- 2 tasks completed
- 60 tasks in progress
- 3 tasks running late

0 days before target
 693 days since start

Go to Process Guide →

Tasks Running Late: There are no overdue tasks

Tasks in Progress:

- Phase I - Budget Request** (highlighted with a yellow arrow)
 Due Nov 27, 2023 5:00 PM PST | Incomplete
- Proposed Salary Pool Allocation FY25
 Due Nov 27, 2023 5:00 PM PST | Incomplete
- Proposed Tuition Rate FY25
 Due Nov 27, 2023 5:00 PM PST | Incomplete

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

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

Multi-Year Planning | Nov 22

Research FY24-28 Multi-Y... | Nov 22

Phase I - Budget Request | Nov 27

Description: Phase I - Budget Request

Content: Phase I - Budget Request

Version: FY2025 Phase I Budget Request

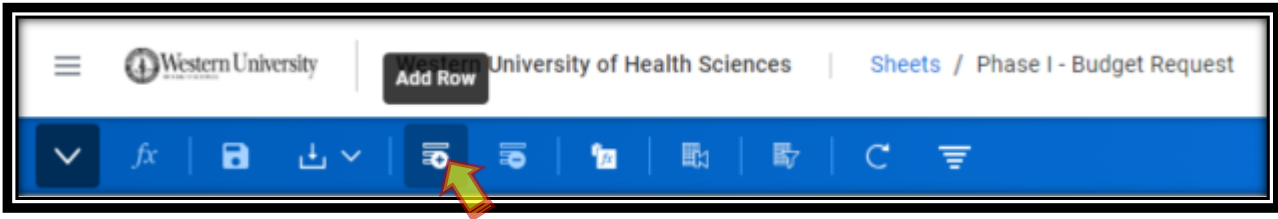
On the sheet, please select the org you will be making the request. Please make selection/ input your data for each column. All fields are required to be completed.

#	GL ACCOUNT	REQUEST AMOUNT	EFFECTIVE DATE
1	Total	0.00	

Showing rows 0 of 0.

Section II: Creating Top Five Priorities

Step 1: Click the 'Add Row' button towards the top of the screen.

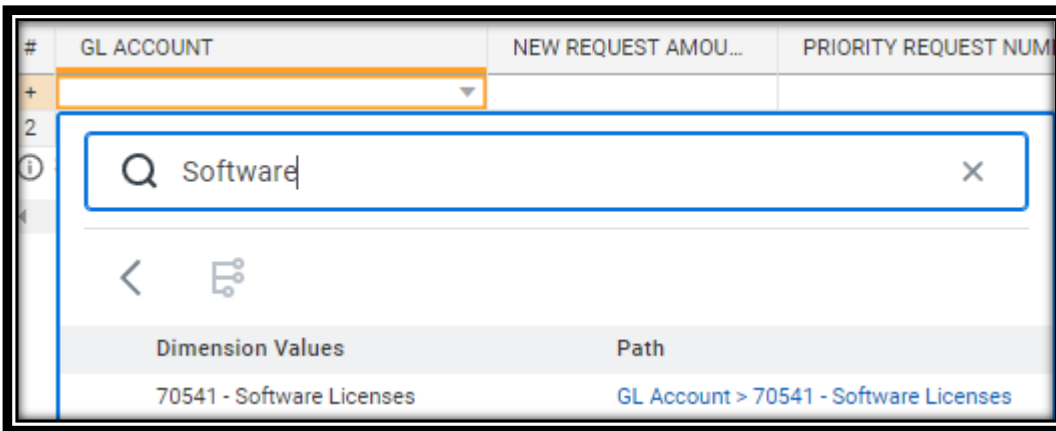


Step 2: Input the Acct #, Requested Amount, Effective Date, and Priority Ranking. Indicate if there is a history of deficit in the account, whether the request is a one-time or ongoing need, and add a short rationale.

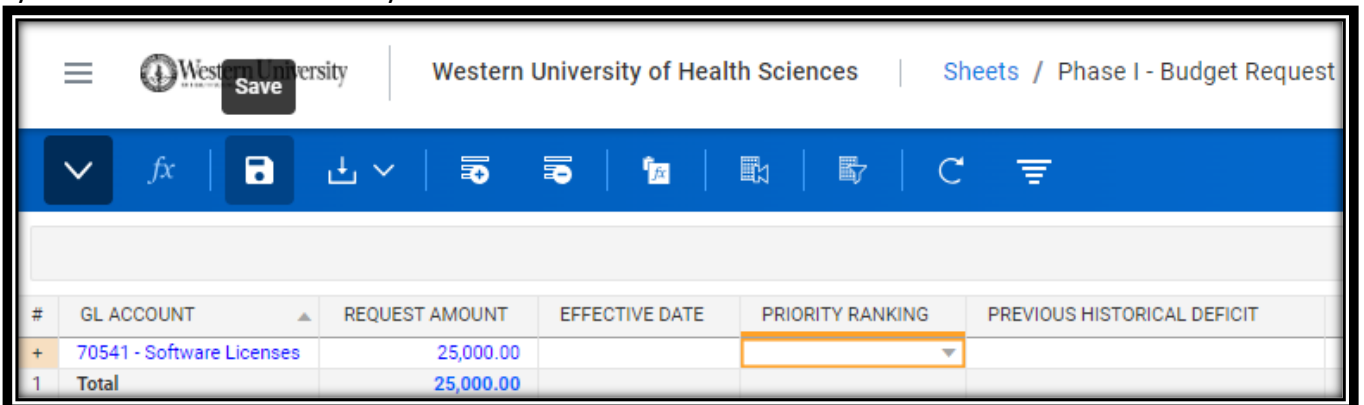


#	GL ACCOUNT	REQUEST AMOUNT	EFFECTIVE DATE	PRIORITY RANKING	PREVIOUS HISTORICAL DEFICIT	FUNDING TYPE	SHORT RATIONALE/JUSTIFICATION
+							
1	Total	0.00					

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

v
fx
📁
↓
🔄
📄
📄
📄
🔄
☰

#	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.

Western University | Western University of Health Sciences | Processes / Overview

Create Task | Assigned to: Me | Process: Multi-Year Planning

Days to target: 0
Process target date:
Final task due date:

- 0 days before target
- 693 days since start

Overall progress: 3%

- 2 tasks completed
- 60 tasks in progress
- 3 tasks running late

Go to Process Guide →

Tasks Running Late: There are no overdue tasks

Tasks in Progress:

- Phase I - Budget Request (Due Nov 27, 2023 5:00 PM PST) - Incomplete
- Proposed Salary Pool Allocation FY25** (Due Nov 27, 2023 5:00 PM PST) - Incomplete
- Proposed Tuition Rate FY25 (Due Nov 27, 2023 5:00 PM PST) - Incomplete

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

Western University | Western University of Health Sciences | Sheets / Proposed Salary Pool Allocation FY25

Multi-Year Planning | Nov 22

- Phase I - Budget Request | Nov 27
- Proposed Salary Pool Alloc...** | Nov 27

Description: Proposed Salary Pool Allocation FY25
Version: FY2025 Phase I Budget Request

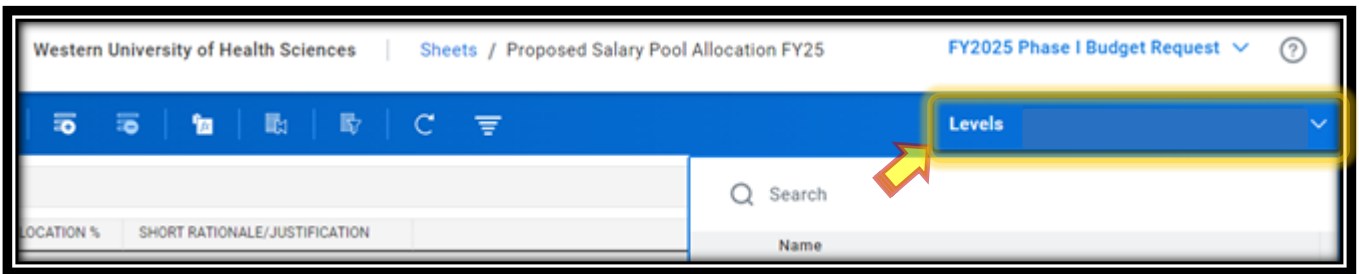
Content: Proposed Salary Pool Allocation FY25
Version: FY2025 Phase I Budget Request

On the sheet, please select your home org. Please input FY25 Proposed Salary Pool Allocation % and complete the Short Rationale/Justification field as well. All fields are required to be completed.

#	FY25 PROPOSED SALARY POOL ALLOCATION %	SHORT RATIONALE/JUSTIFICATION
No data found		
Showing rows 0 of 0.		

Section IV: Completing the Proposed Salary Pool Allocation Sheet

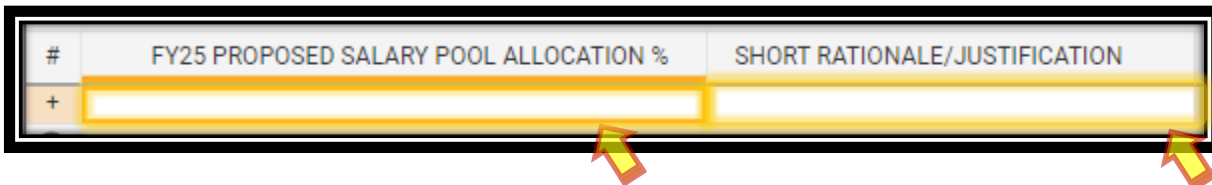
Step 1: Select your 'Home Org' from the Levels dropdown list.



Step 2: Click the 'Add Row' button towards the top of the screen.




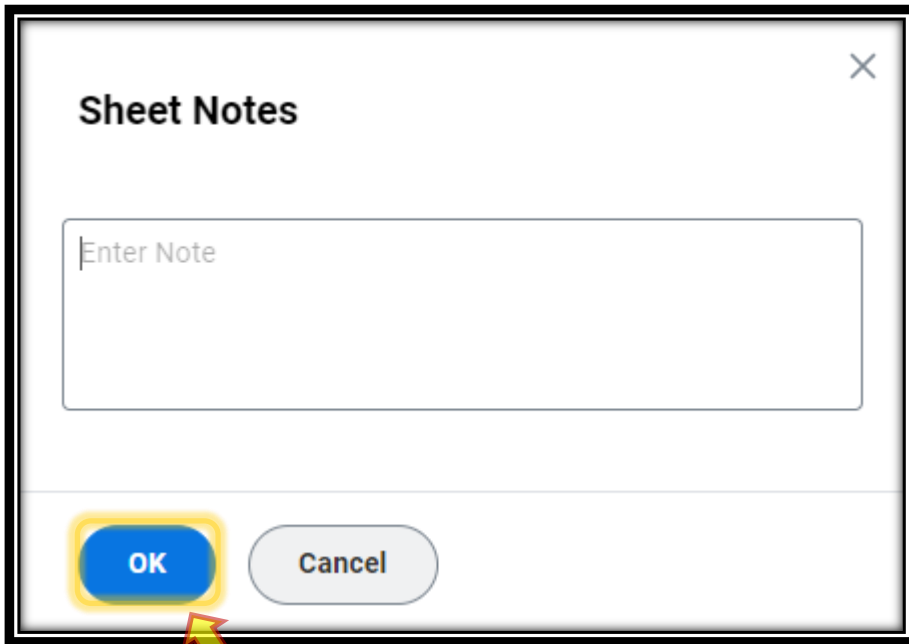
Step 3: Input the salary pool allocation percentage and a rationale in each corresponding column.



Click on a cell to input information.

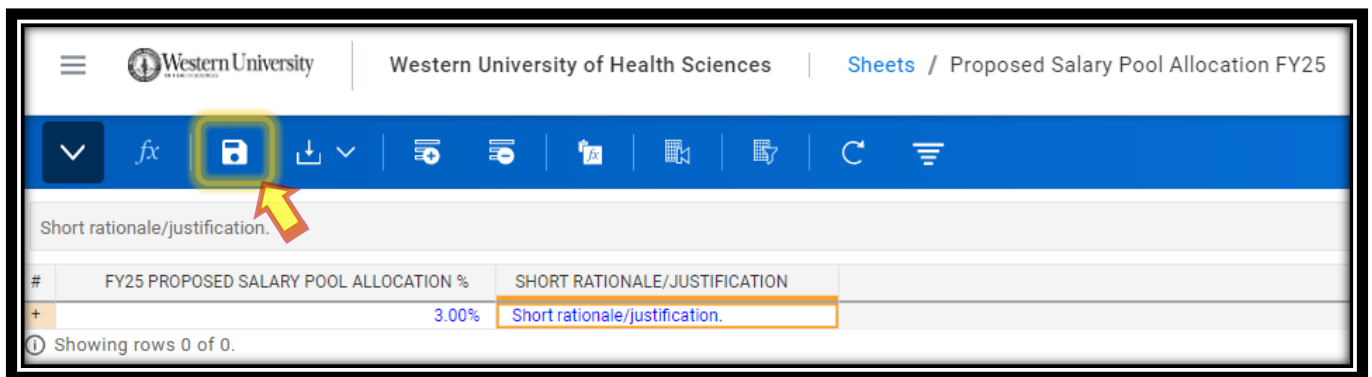
Note: You do not need to include the “%” when entering a rate (number) into the FY25 Proposed Salary Pool Allocation % field.

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.

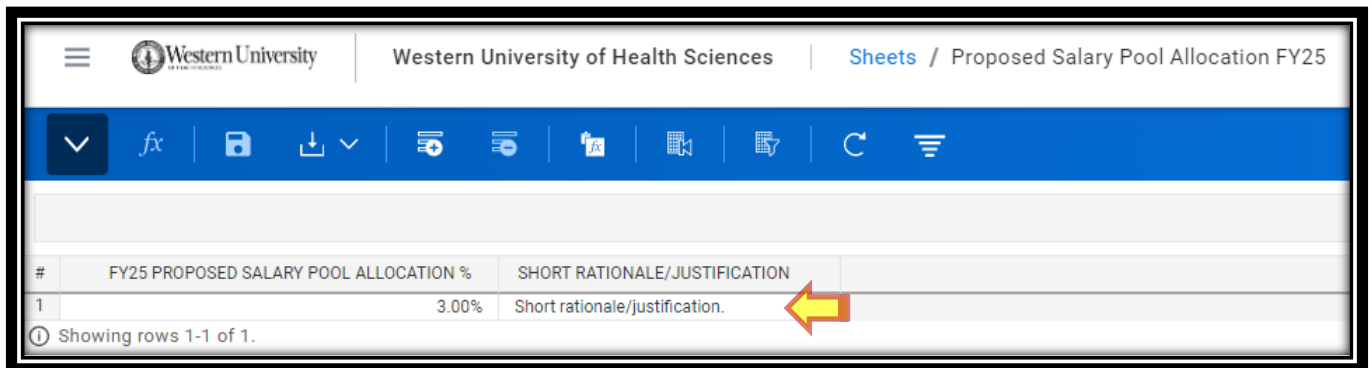


If additional files are to be included as backup documentation, please save such files into the shared W drive.

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

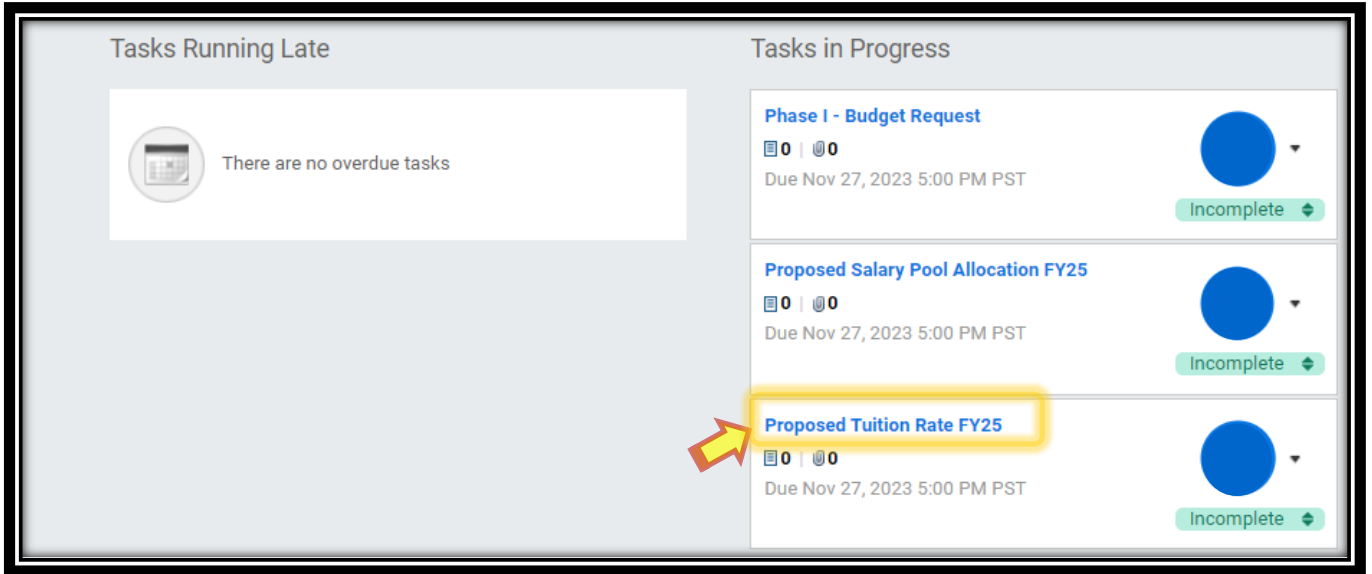


The text should change from blue to black font.

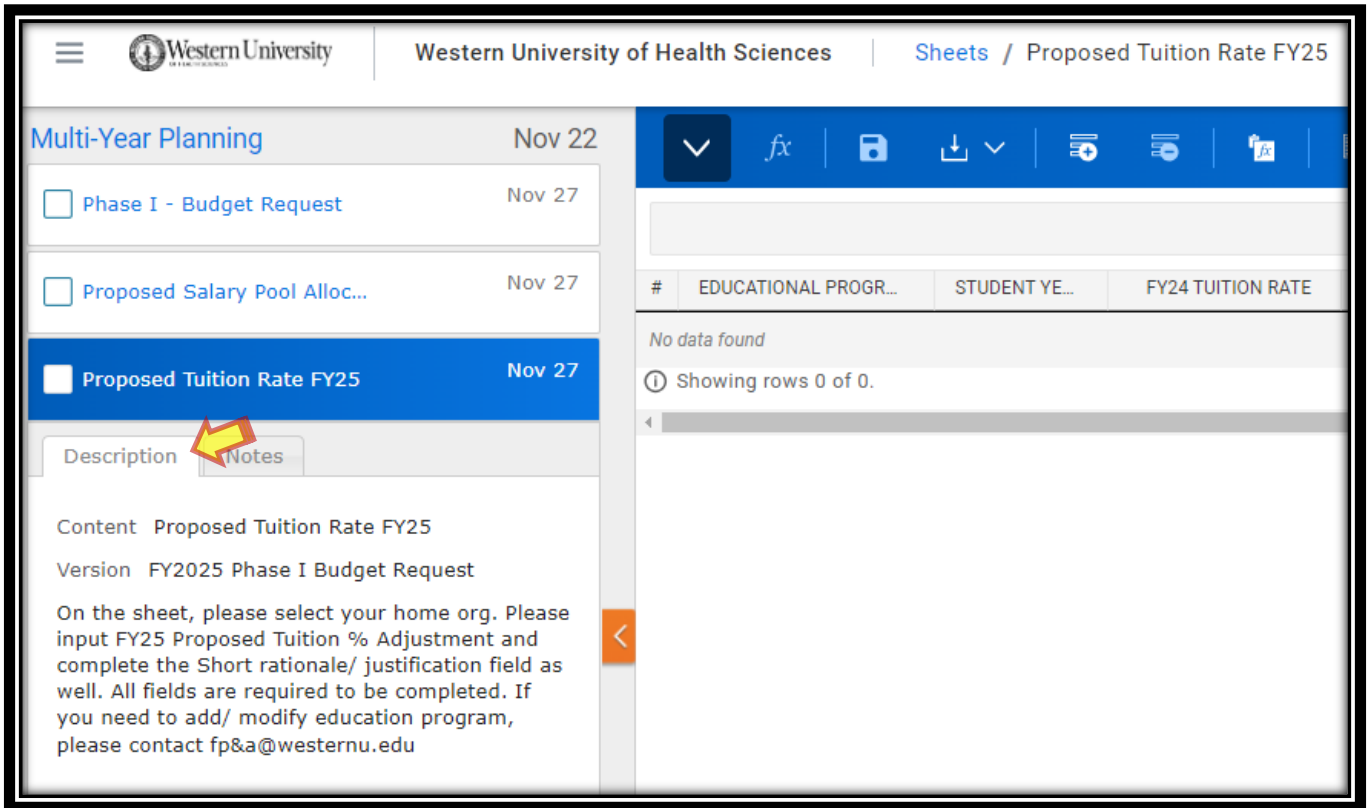


Section V: Accessing Proposed Tuition Rate Sheet

Step 1: Click on 'Proposed Tuition Rate FY25' under the Tasks in Progress list.

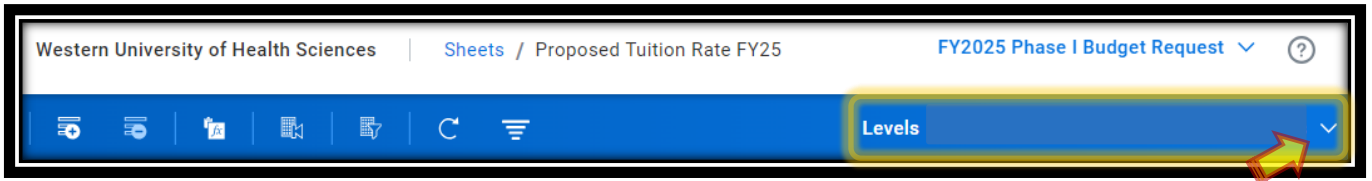


Step 2: Read the Description provided on the left side of the sheet.



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.

The screenshot shows the first row of data in the spreadsheet. The columns are: #, LEVEL, EDUCATIONAL PROGRAM, STUDENT YEAR, FY24 TUITION RATE, FY25 PROPOSED TUITION % ADJUSTMENT, FY25 NEW TUITION RATE, and SHORT RATIONALE/JUSTIFICATION. The first row contains the following data: 1, Education Program Name, 1, 50,000.00, 53,000. The 'FY25 PROPOSED TUITION % ADJUSTMENT' and 'SHORT RATIONALE/JUSTIFICATION' cells are highlighted with yellow boxes, and red arrows point to them.


#	LEVEL	EDUCATIONAL PROGRAM	STUDENT YEAR	FY24 TUITION RATE	FY25 PROPOSED TUITION % ADJUSTMENT	FY25 NEW TUITION RATE	SHORT RATIONALE/JUSTIFICATION
1		Education Program Name	1	50,000.00		53,000	

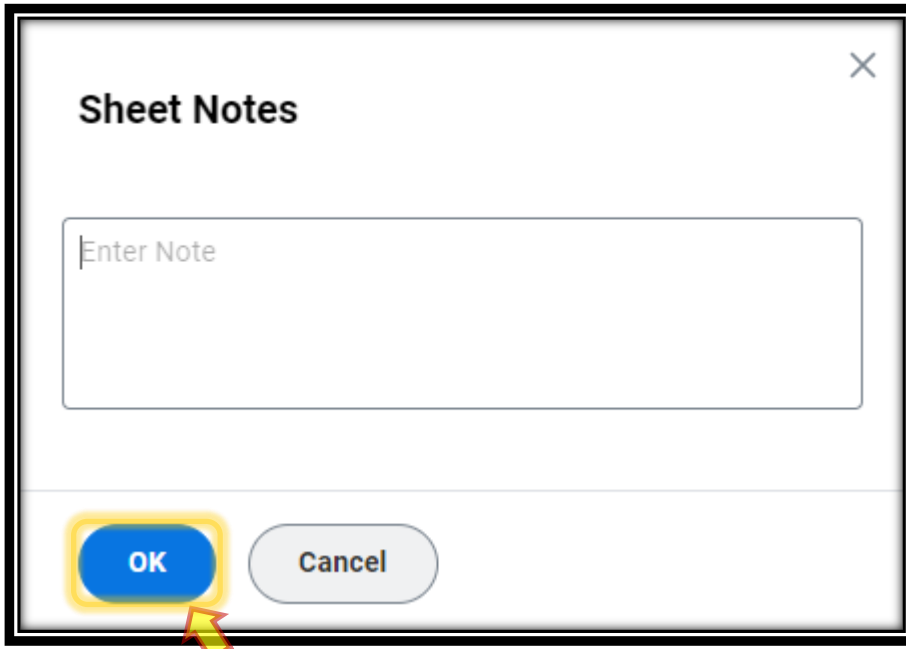
Step 2: Click on the cell to input your FY25 Proposed Tuition % Adjustment rate and complete the Short Rationale/Justification field. Once this has been completed, click on the Save icon and the new tuition rate will be automatically calculated.

The screenshot shows the first row of data in the spreadsheet. The columns are: #, LEVEL, EDUCATIONAL PROGRAM, STUDENT YEAR, FY24 TUITION RATE, FY25 PROPOSED TUITION % ADJUSTMENT, FY25 NEW TUITION RATE, and SHORT RATIONALE/JUSTIFICATION. The first row contains the following data: 1, Education Program Name, 1, 50,000.00, 6.00%, 50,000. The 'FY25 PROPOSED TUITION % ADJUSTMENT' and 'SHORT RATIONALE/JUSTIFICATION' cells are highlighted with yellow boxes, and red arrows point to them.

#	LEVEL	EDUCATIONAL PROGRAM	STUDENT YEAR	FY24 TUITION RATE	FY25 PROPOSED TUITION % ADJUSTMENT	FY25 NEW TUITION RATE	SHORT RATIONALE/JUSTIFICATION
1		Education Program Name	1	50,000.00	6.00%	50,000	Short rationale/justification

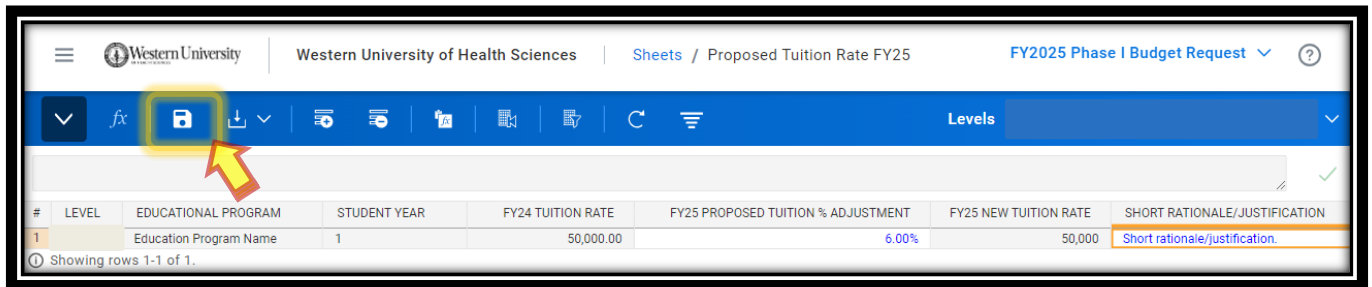
Note: You do not need to include the “%” when entering a number into the FY25 Proposed Tuition % Adjustment field.

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.

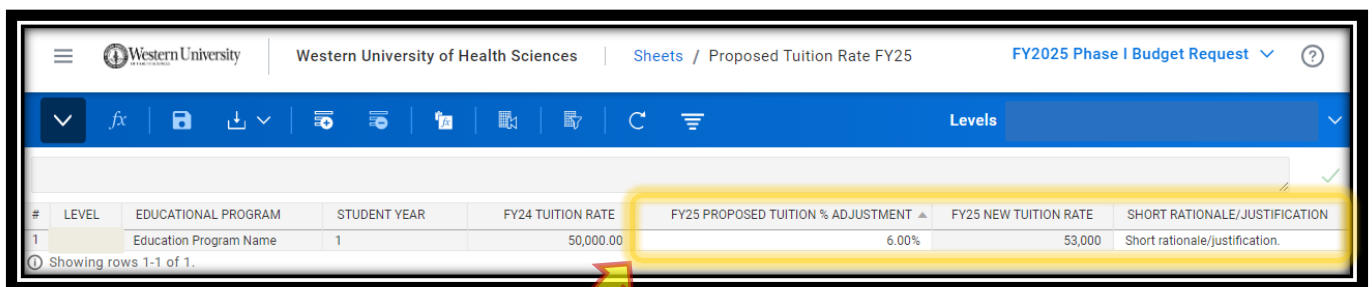


If additional files are to be included as backup documentation, please save such files into the shared W drive.

Step 4: Once reviewed and completed, click on the Save icon again.



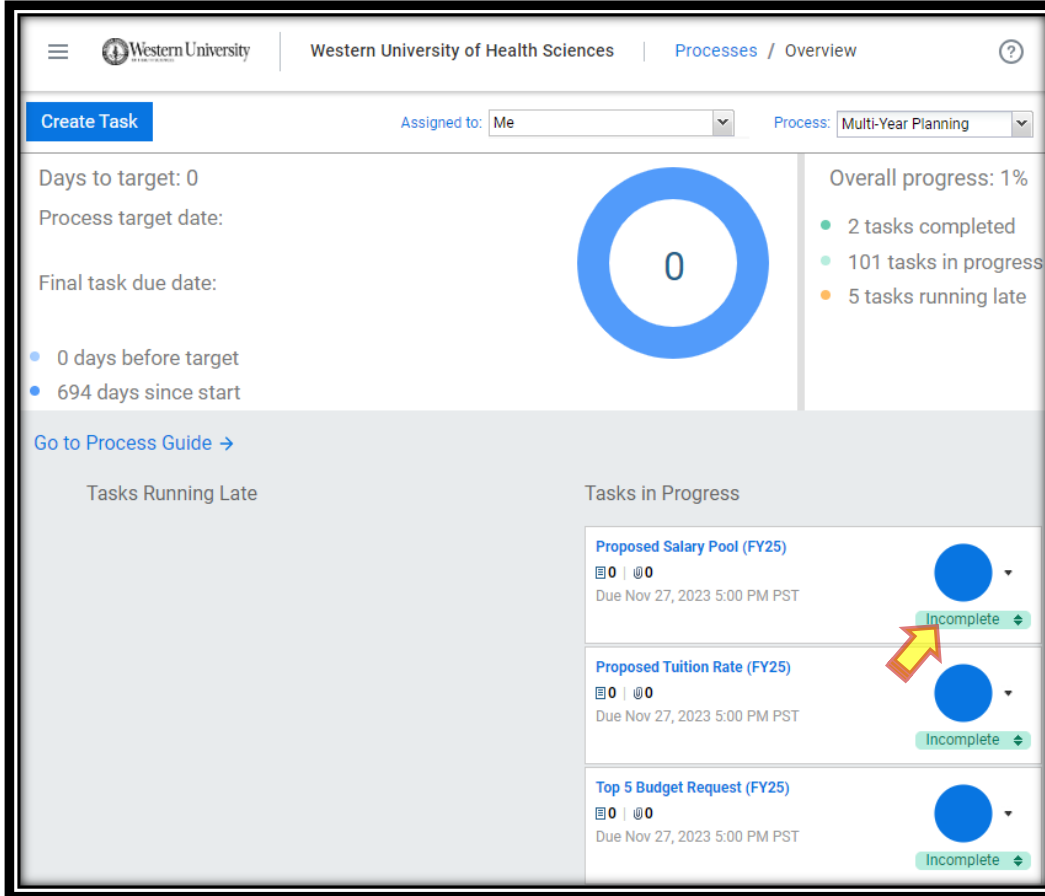
The text should change from blue to black font and the FY25 New Tuition Rate should adjust.



Section VI: Marking Tasks as Completed in Workday

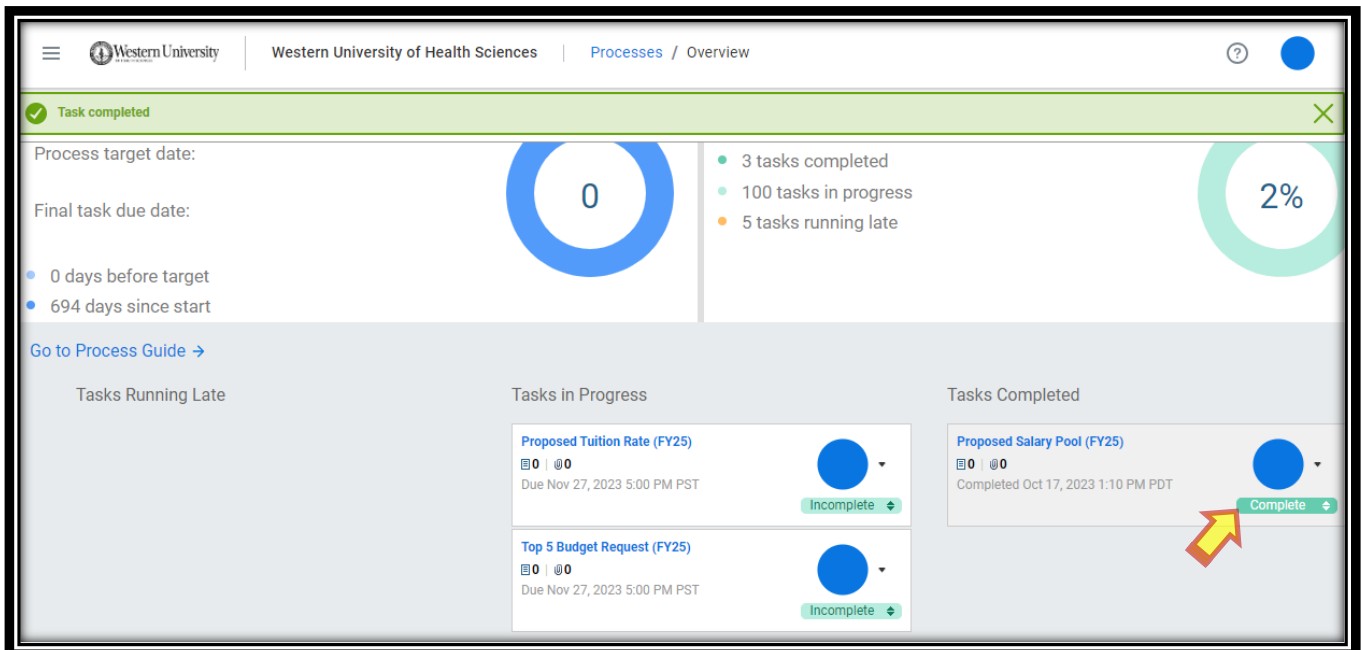
Step 1: Repeat the steps to access the 'Processes' page in Workday to view all Tasks.

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



The screenshot shows the 'Processes / Overview' page for 'Western University of Health Sciences'. The page includes a 'Create Task' button, a dropdown for 'Assigned to: Me', and a dropdown for 'Process: Multi-Year Planning'. A large blue circular progress indicator shows '0'. To the right, 'Overall progress: 1%' is displayed with a summary: 2 tasks completed (green dot), 101 tasks in progress (light green dot), and 5 tasks running late (orange dot). Below this, there are three task cards under the 'Tasks in Progress' column: 'Proposed Salary Pool (FY25)', 'Proposed Tuition Rate (FY25)', and 'Top 5 Budget Request (FY25)'. Each card has a blue circle and an 'Incomplete' button. A yellow arrow points to the 'Incomplete' button of the 'Proposed Salary Pool' task.

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



The screenshot shows the same 'Processes / Overview' page. A green notification banner at the top reads 'Task completed'. The large blue circular progress indicator still shows '0', but a new green circular progress indicator on the right shows '2%'. The 'Overall progress' summary now shows: 3 tasks completed (green dot), 100 tasks in progress (light green dot), and 5 tasks running late (orange dot). The task cards are now distributed: 'Proposed Tuition Rate (FY25)' and 'Top 5 Budget Request (FY25)' remain in the 'Tasks in Progress' column, while 'Proposed Salary Pool (FY25)' has moved to the 'Tasks Completed' column. The 'Proposed Salary Pool' card now shows 'Completed Oct 17, 2023 1:10 PM PDT' and a 'Complete' button. A yellow arrow points to the 'Complete' button.