

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 Priority 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'**.

Username or Email *

Password *



Remember Username

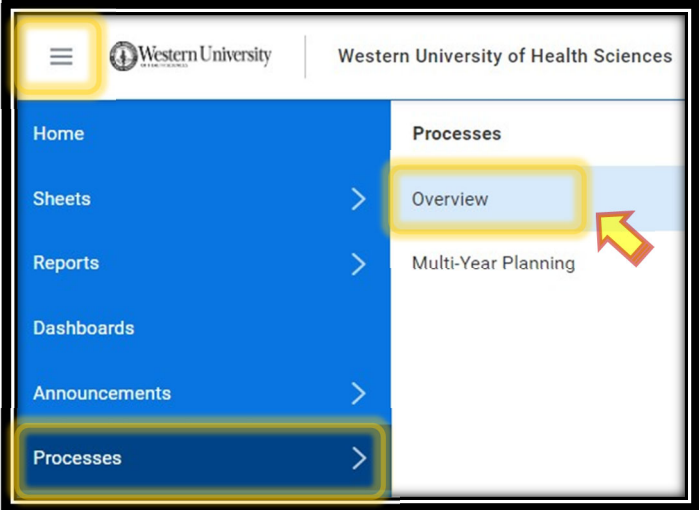
Sign In

[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 '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 screenshot displays the 'Processes / Overview' page for 'Western University of Health Sciences'. At the top, there is a navigation bar with the university logo and name. Below this, a 'Create Task' button is visible on the left, and dropdown menus for 'Assigned to: Me' and 'Process: Multi-Year Planning' are on the right. The main content area is divided into two columns. The left column shows 'Days to target: 0', 'Process target date:', and 'Final task due date:'. Below these are two bullet points: '0 days before target' and '154 days since start'. A large blue circular progress indicator in the center contains the number '0'. The right column shows 'Overall progress: 0%' and a summary of task status: '1 tasks completed' (green dot), '116 tasks in progress' (light blue dot), and '1 tasks running late' (orange dot). Below the progress indicators, there is a 'Go to Process Guide' link. The bottom section is titled 'Tasks in Progress' and lists three tasks: 'Proposed Salary Increase Allocation', 'Proposed Tuition Rate', and 'Top 5 Strategic Budget Requests-Academic'. Each task entry includes a calendar icon, a progress bar, and a status indicator (a blue circle with a dropdown arrow and the text 'Incomplete'). Three yellow arrows point from the 'Tasks Running Late' section to the three tasks 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.

Days to target: 0

Process target date:

Final task due date:

0 days before target

154 days since start

Overall progress: 2%

- 3 tasks completed
- 114 tasks in progress
- 1 tasks running late

[Go to Process Guide →](#)

Tasks Running Late

Tasks in Progress

There are no overdue tasks

Top 5 Strategic Budget Requests-Academic

Due Nov 25, 2024 11:59 PM PST

Incomplete

Section I: Accessing the Budget Request Sheet

Step 1: Click on 'Top 5 Strategic Budget Requests' under the Tasks in Progress list.

The dashboard displays the following information:

- Days to target: 0
- Process target date:
- Final task due date:
- Overall progress: 2%
- 3 tasks completed
- 114 tasks in progress
- 1 tasks running late
- 0 days before target
- 154 days since start
- Go to Process Guide →
- Tasks Running Late: There are no overdue tasks
- Tasks in Progress: Top 5 Strategic Budget Requests-Academic (Due Nov 25, 2024 11:59 PM PST), Incomplete

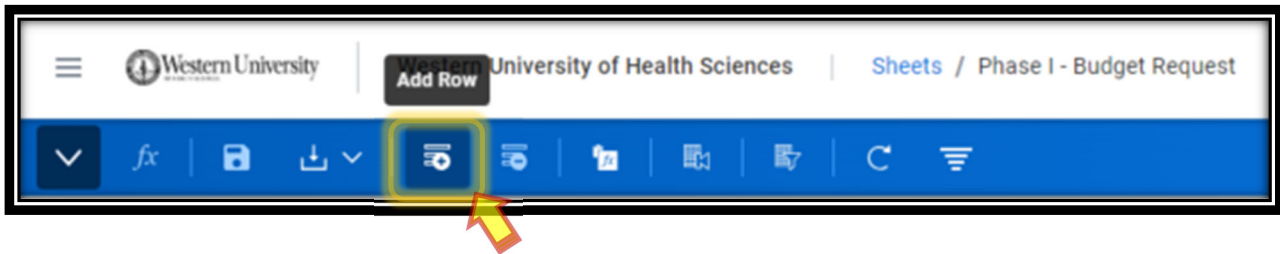
Step 2: Read the Description provided on the left side of the sheet.

The interface shows the following details:

- Western University of Health Sciences | Sheets / Phase I - Budget Request
- Multi-Year Planning | Nov 22
- Task: Top 5 Strategic Budget Re... (Nov 25)
- Description: Phase I - Budget Request
- Version: FY2026 Phase I Strategic Budget Request
- Instructions: 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.
- Table with columns: #, GL ACCOUNT, REQUEST AMOUNT, EFFECTIVE DATE, PRIORITY
- Table Row 1: 1, Total, 0.00
- Status: Showing rows 0 of 0.

Section II: Creating Top Five Priorities

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

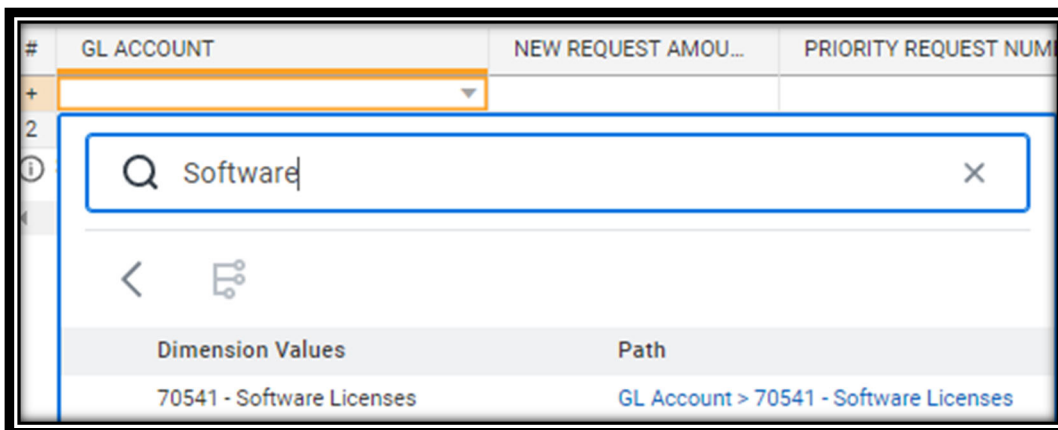


Step 2: Input the Acct #, Requested Amount, Effective Date, and Priority Ranking. Indicate whether the request is a one-time or ongoing need, provide a compensation analysis reference # (new positions & position modifications only). Confirm request has been included on projection, indicate the primary strategic theme and secondary strategic theme (optional) and provide a short rationale/justification.

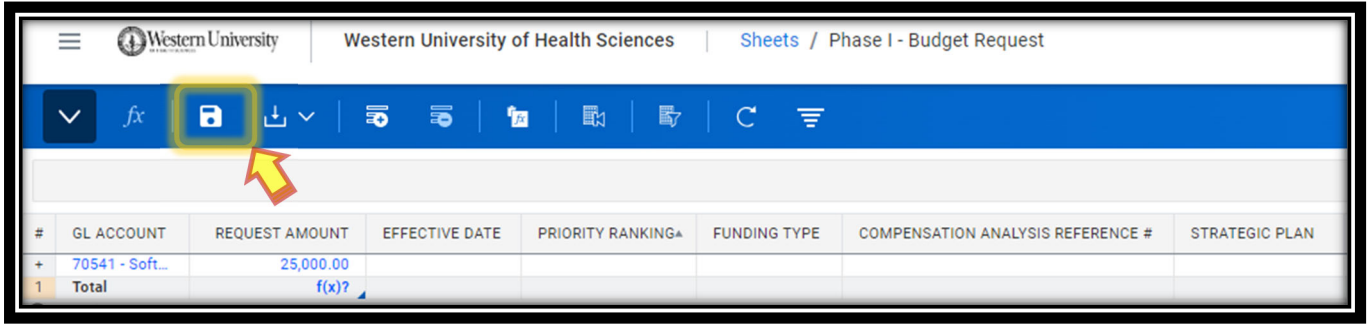
Note: Compensation Analysis Reference # will be provided by HR/Compensation, via email.



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.




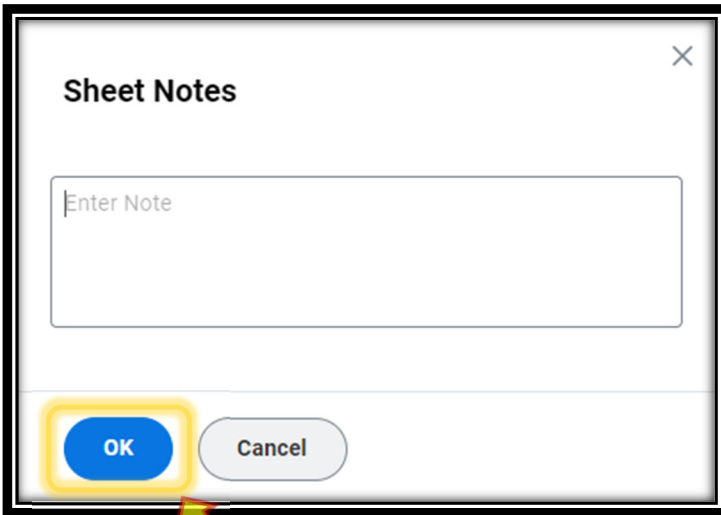
Step 3: Click on the Save icon to save your work. We recommend doing this frequently, as the system does not automatically save.



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

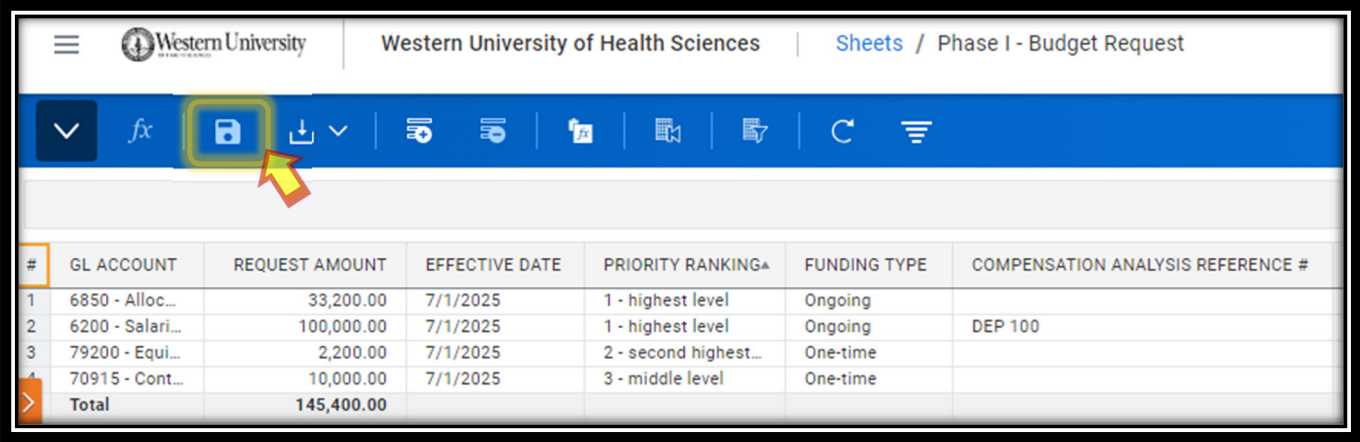
#	GL ACCOUNT	REQUEST AMOUNT	EFFECTIVE DATE	PRIORITY RANKING ^a	FUNDING TYPE	COMPENSATION ANALYSIS REFERENCE #	STRATEGIC PLAN	PRIMARY STRATEGIC THEME
1	6850 - Alloc...	33,200.00	7/1/2025	1 - highest level	Ongoing		Included on Projection	Operational Excellence
2	6200 - Salari...	100,000.00	7/1/2025	1 - 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.

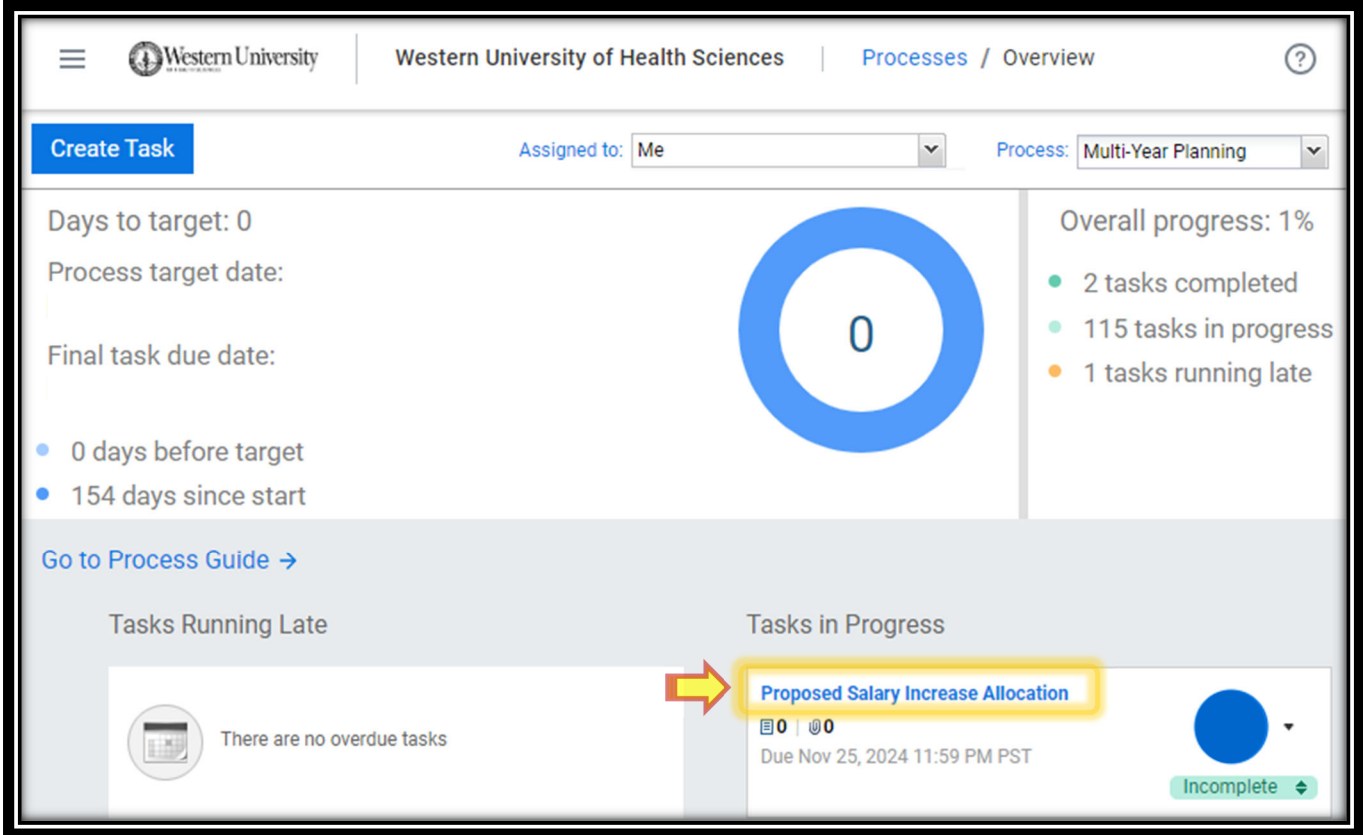


The screenshot shows a web application interface for Western University of Health Sciences. The top navigation bar includes the university logo, the name 'Western University of Health Sciences', and the current page 'Sheets / Phase I - Budget Request'. Below the navigation bar is a blue toolbar with various icons. The 'Save' icon, represented by a floppy disk, is highlighted with a yellow square and a red arrow pointing to it. Below the toolbar is a table with the following data:

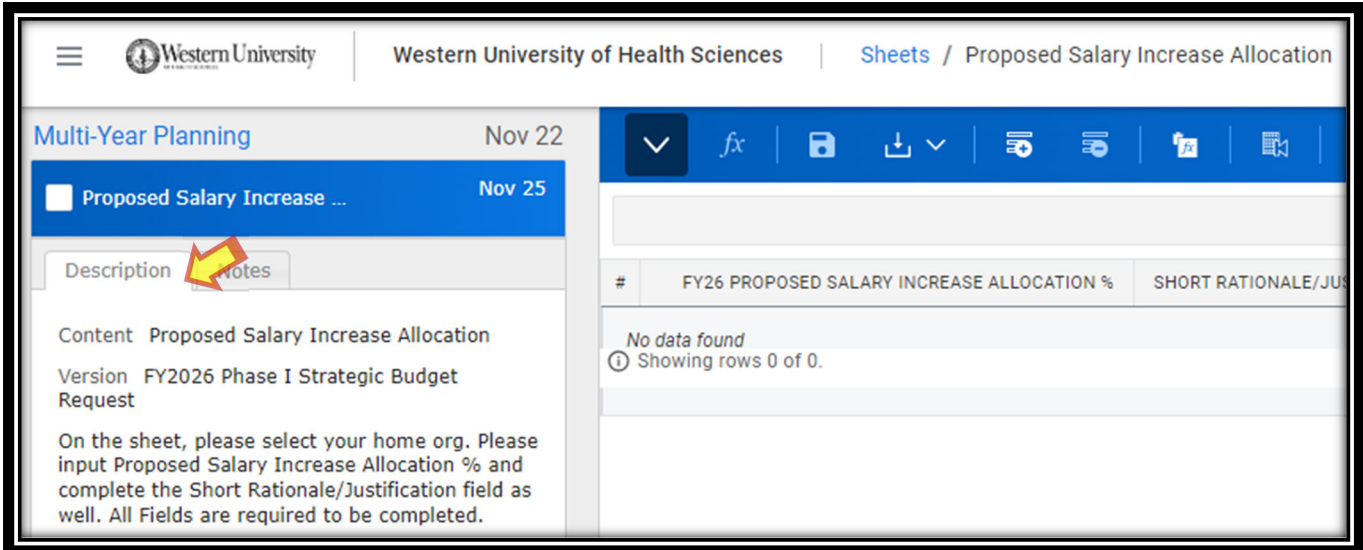
#	GL ACCOUNT	REQUEST AMOUNT	EFFECTIVE DATE	PRIORITY RANKING*	FUNDING TYPE	COMPENSATION ANALYSIS REFERENCE #
1	6850 - Alloc...	33,200.00	7/1/2025	1 - highest level	Ongoing	
2	6200 - Salari...	100,000.00	7/1/2025	1 - highest level	Ongoing	DEP 100
3	79200 - Equi...	2,200.00	7/1/2025	2 - second highest...	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.

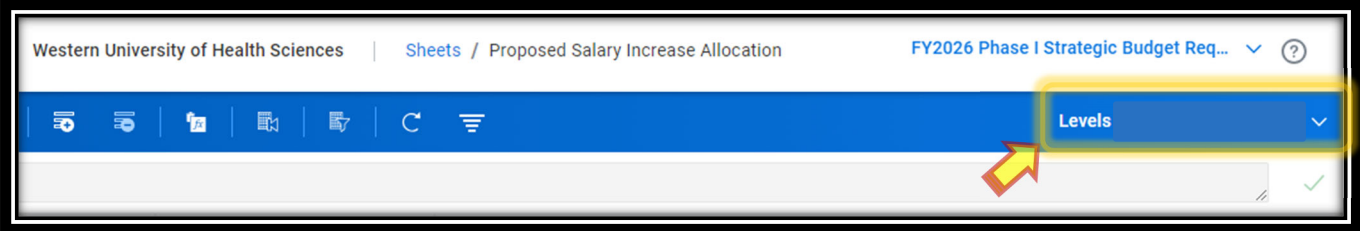


Step 2: Read the Description provided on the left side of the sheet.



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.

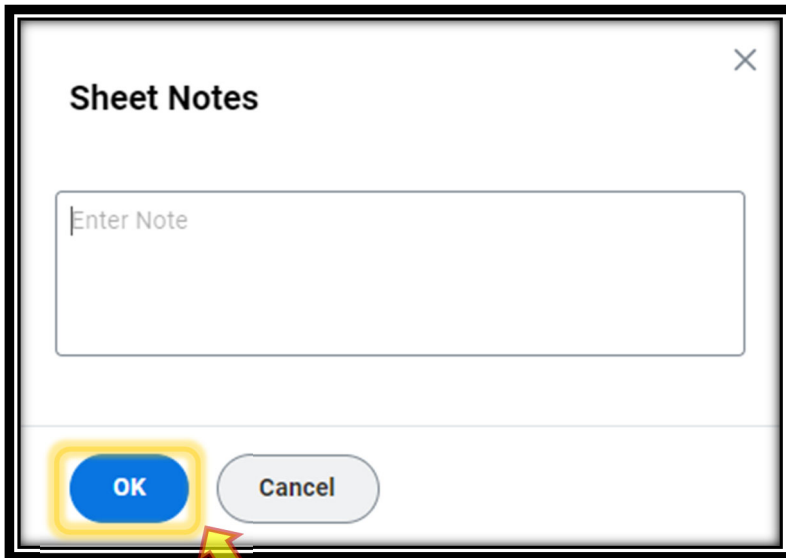
#	FY26 PROPOSED SALARY INCREASE ALLOCATION %	SHORT RATIONALE/JUSTIFICATION
+		

A screenshot of a spreadsheet table. The table has two columns: 'FY26 PROPOSED SALARY INCREASE ALLOCATION %' and 'SHORT RATIONALE/JUSTIFICATION'. The first row is a header row with a '#' in the first column. The second row is a data entry row with a '+' in the first column. The two data cells are highlighted with yellow boxes, and red arrows point to them from the bottom.

Click on a cell to input information.

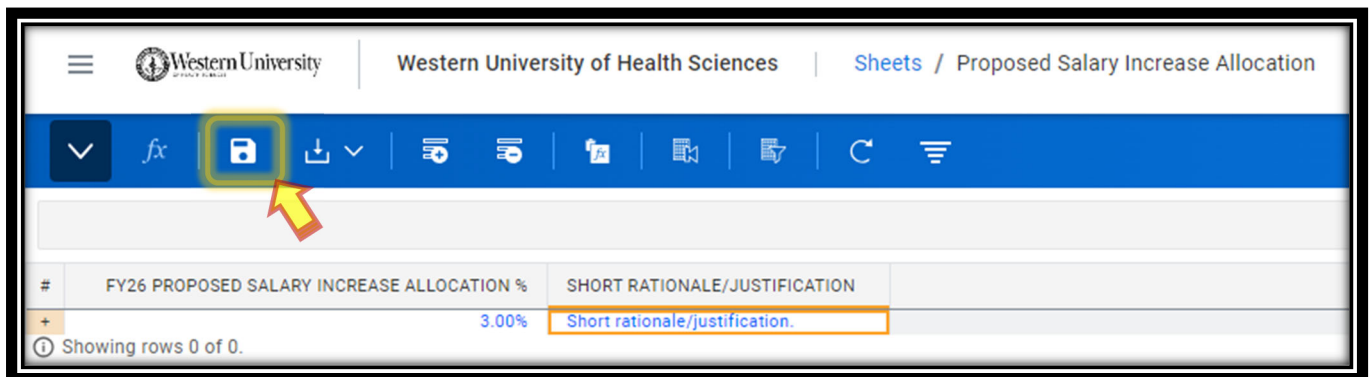
Note: You do not need to include the “%” when entering a rate (number) into the FY26 Proposed Salary Increase Allocation % field.

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.

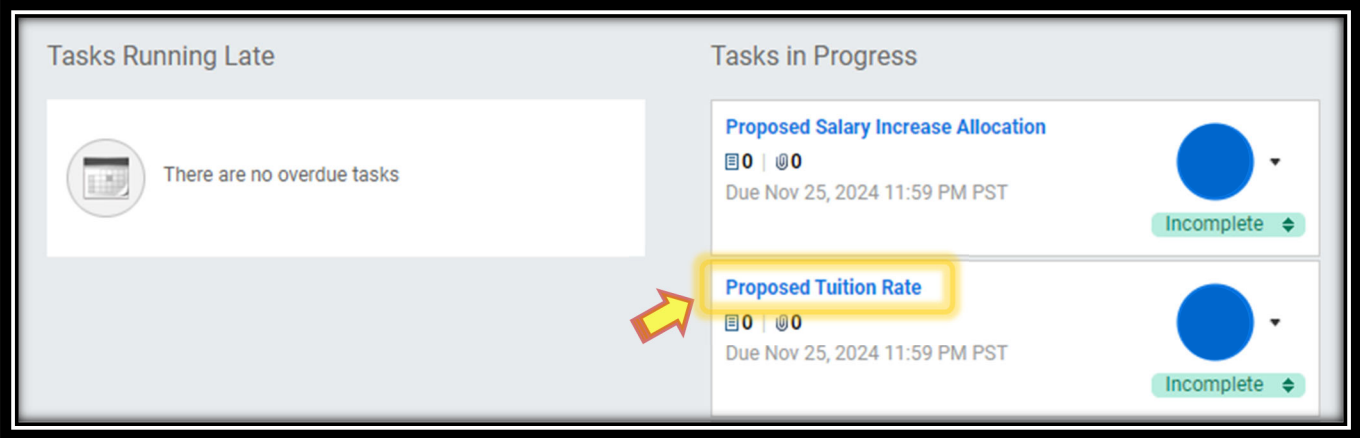


The text should change from blue to black font.

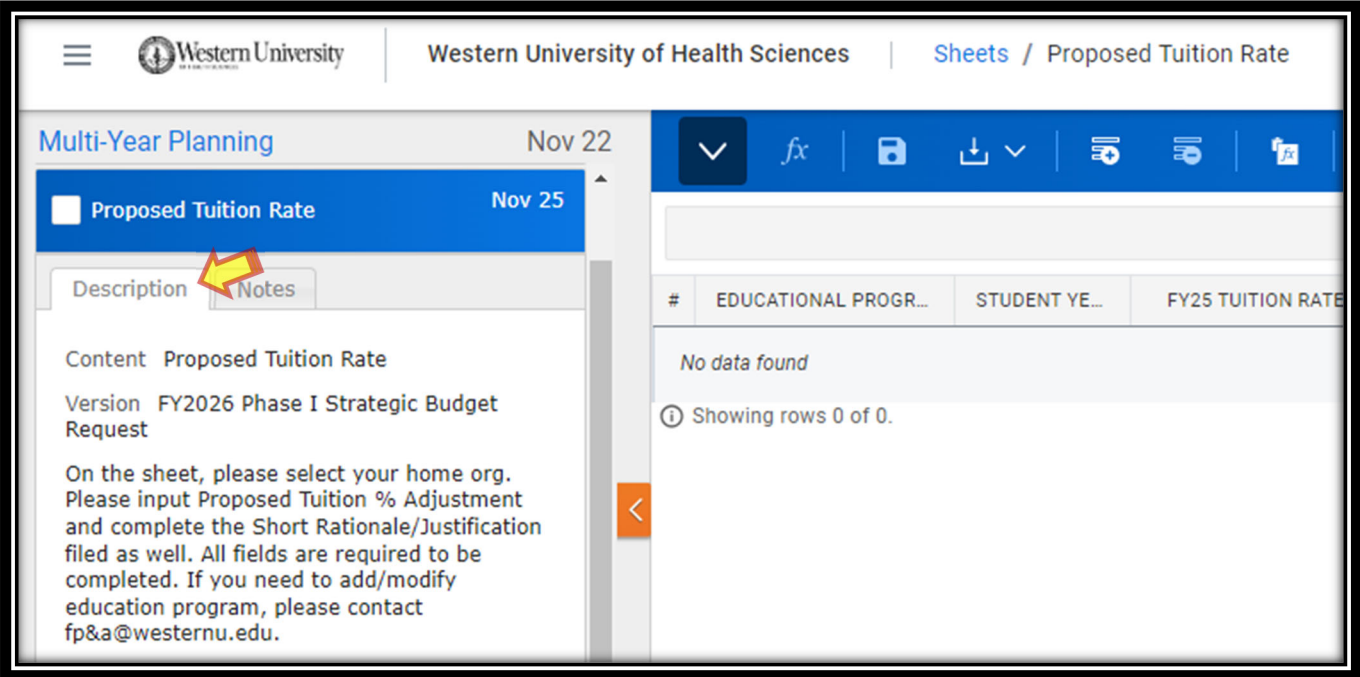


Section V: Accessing Proposed Tuition Rate Sheet

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

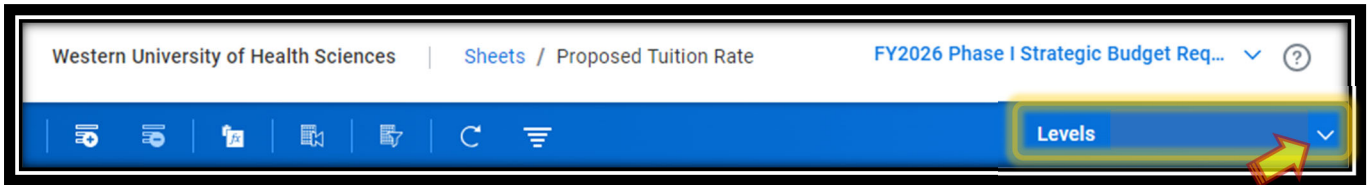


Step 2: Read the Description provided on the left side of the sheet.



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.

A screenshot of the spreadsheet showing the first row of data. The columns are: #, LEVEL, EDUCATIONAL PROGRAM, STUDENT YEAR, FY25 TUITION RATE, FY26 PROPOSED TUITION % ADJUSTMENT, and FY26 NEW TUITION RATE. The first row contains: 1, Education Program A, 1, 50,000.00, and 50,000. Red arrows point to the 'FY26 PROPOSED TUITION % ADJUSTMENT' and 'FY26 NEW TUITION RATE' cells.


#	LEVEL	EDUCATIONAL PROGRAM	STUDENT YEAR	FY25 TUITION RATE	FY26 PROPOSED TUITION % ADJUSTMENT	FY26 NEW TUITION RATE
1		Education Program A	1	50,000.00		50,000

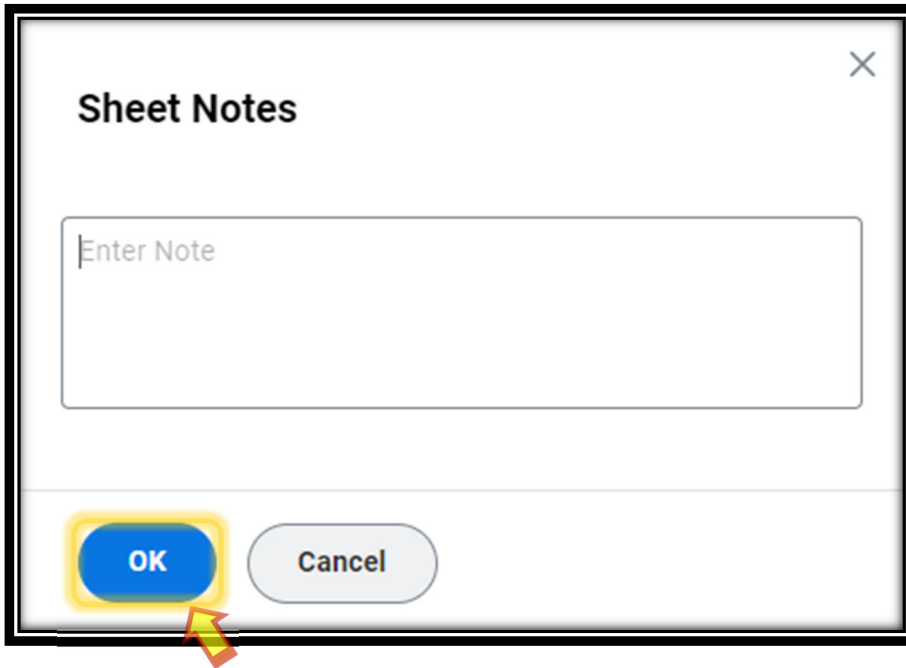
Step 2: Click on the cell to input your FY26 Proposed Tuition % Adjustment rate and complete the Short Rationale/Justification field. Once this has been completed, click on the Save icon and the new tuition rate will be automatically calculated.

A screenshot of the spreadsheet showing the updated data. The 'FY26 PROPOSED TUITION % ADJUSTMENT' cell now contains '6.00%' and the 'SHORT RATIONALE/JUSTIFICATION' cell contains 'Short rationale/justification'. Red arrows point to these two cells.

#	LEVEL	EDUCATIONAL PROGRAM	STUDENT YEAR	FY25 TUITION RATE	FY26 PROPOSED TUITION % ADJUSTMENT	FY26 NEW TUITION RATE	SHORT RATIONALE/JUSTIFICATION
1		Education Program A	1	50,000.00	6.00%	50,000	Short rationale/justification

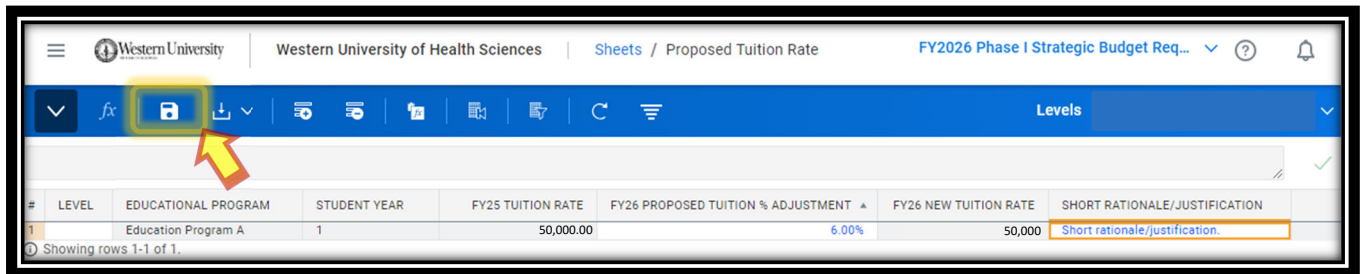
Note: You do not need to include the “%” when entering a number into the FY26 Proposed Tuition % Adjustment field.

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.

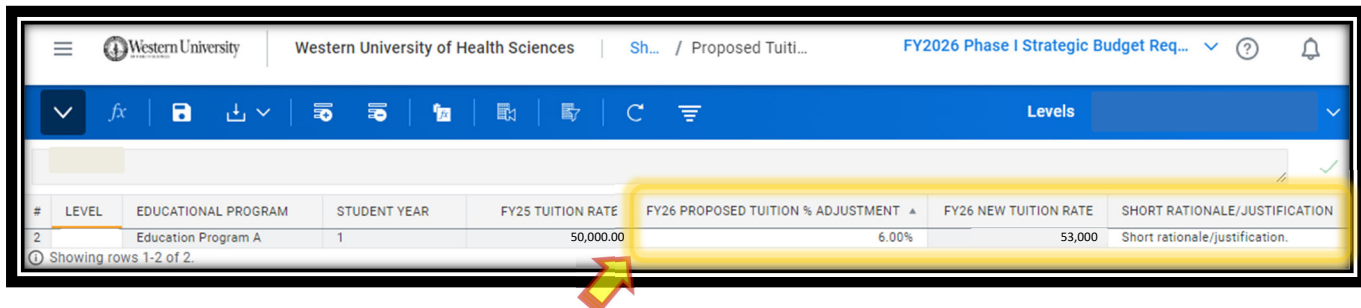


If additional files are to be included as backup documentation, please save such files into the shared W drive.

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



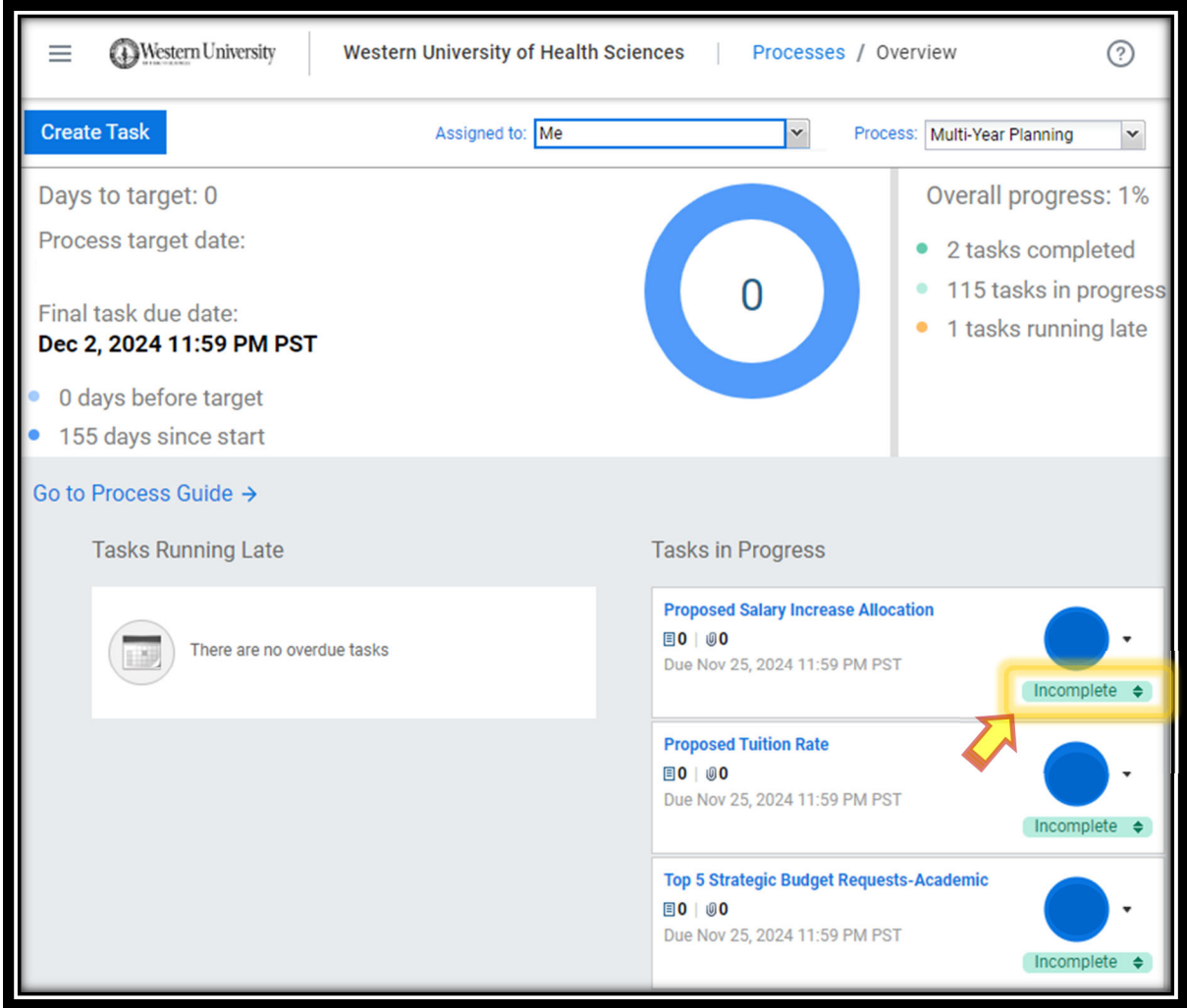
The text should change from blue to black font and the FY26 New Tuition Rate should adjust.



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.

The screenshot displays a project management dashboard for Western University of Health Sciences. At the top, a navigation bar includes the university logo, name, and the path 'Processes / Overview'. A green notification banner at the top left indicates 'Task completed'. The main dashboard features several key metrics: a large blue circular gauge showing '0', a summary of '114 tasks in progress' and '1 tasks running late', and a green circular gauge showing '2%'. On the left, a section titled 'Final task due date: Dec 2, 2024 11:59 PM PST' lists '0 days before target' and '155 days since start'. Below this is a 'Go to Process Guide' link. The dashboard is divided into three columns: 'Tasks Running Late' (containing a message 'There are no overdue tasks'), 'Tasks in Progress' (listing 'Proposed Tuition Rate' and 'Top 5 Strategic Budget Requests-Academic', both marked as 'Incomplete'), and 'Tasks Completed' (listing 'Proposed Salary Increase Allocation', marked as 'Completed'). A red arrow points to the 'Complete' button for the 'Proposed Salary Increase Allocation' task.