Phase I Budget Development Task Instructions

Overview

This guide provides instructions for completing the **FY2027 Phase I Financial Planning and Budget Development Process** tasks in Workday.

Financial data has been provided into Workday to support this process. Historical Actuals reporting (dating back to 2017) is also available in Workday and may be used to assist with budget planning.

During this phase, each college/department will:

- Access the **"Top 5 Strategic Budget Request"** sheet located under the *FY27 3-Year SBP Financial Projection (End User)* version.
- Enter all **five priority requests**, with one line item required for each request.

Important: Please do not make any budget reallocations in Workday during the request phase.

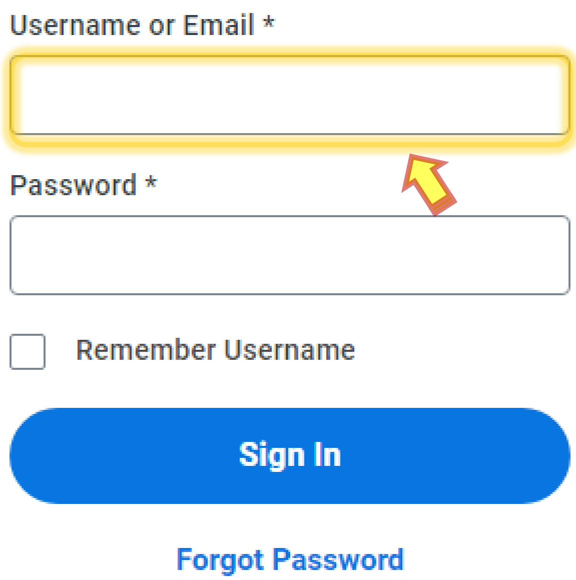
What to Expect: Step-by-Step

1. How to access Workday Sheets
2. Creating Top Five Strategic Budget 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

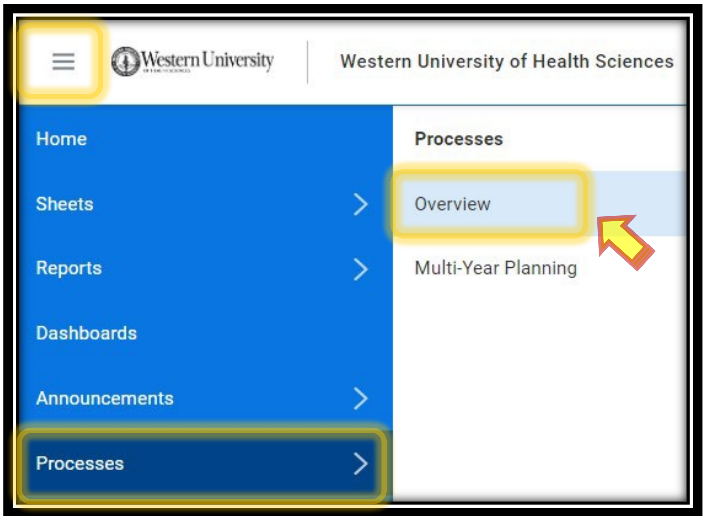
Step 2: Enter your username and password. By default, your Username will be your email address, and the **Password field should be left blank.** Click **Sign In**.



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

Accessing the Workday Sheets

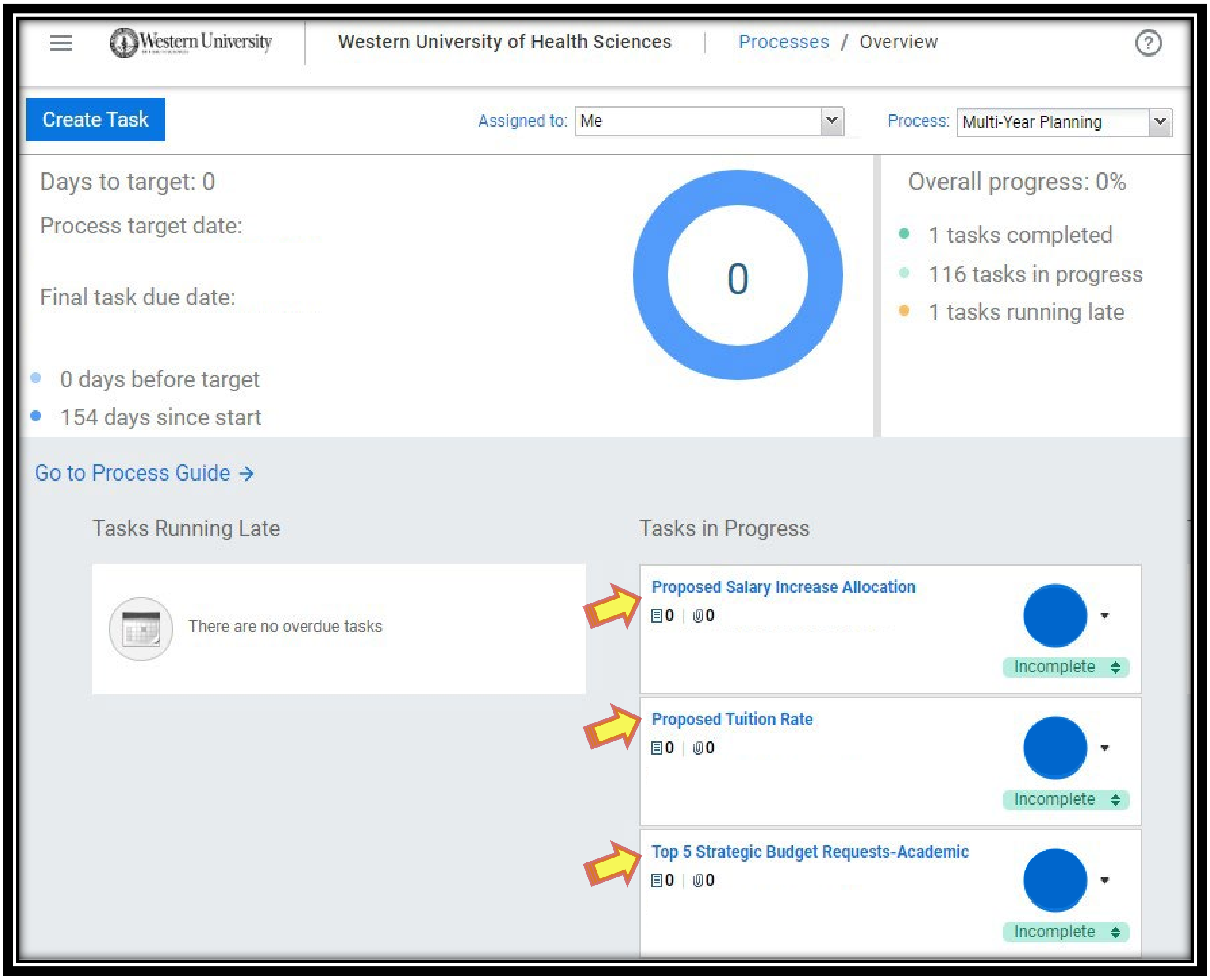
Step 1: Click on the ≡ Menu icon at the Top left and under **Processes**, click **Overview**.



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.

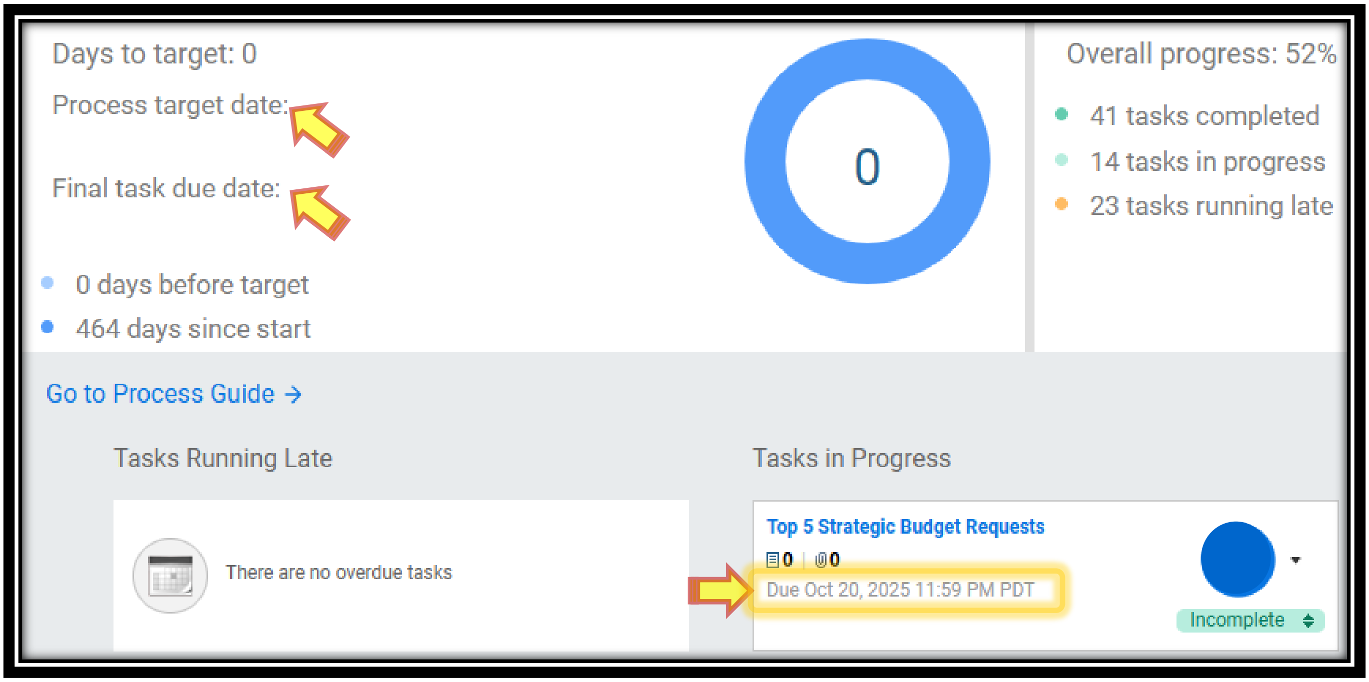
Step 3: All sheets assigned to you will appear under the Tasks in Progress section.



The assigned tasks for the Phase I Budget Development process will include:

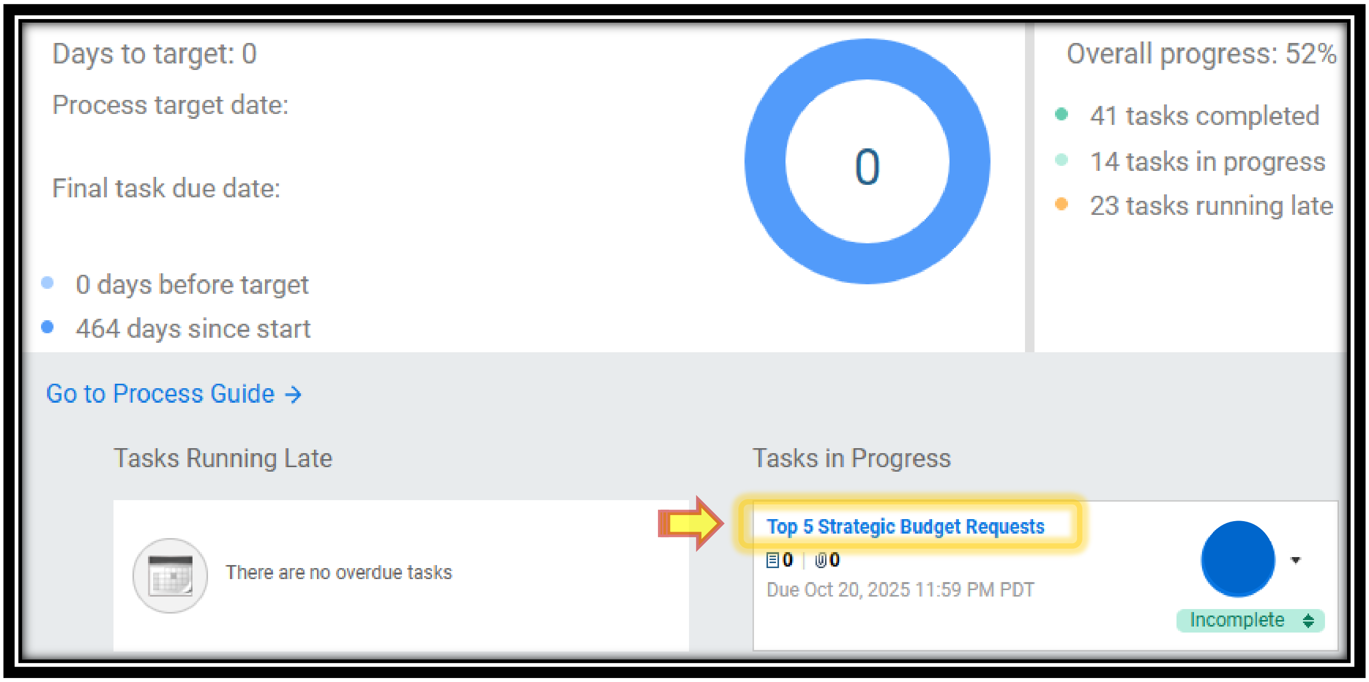
- Top 5 Strategic Budget Requests **(Support only)**
- Top 5 Strategic Budget Requests-Academic **(Colleges only)**
- Top 5 Strategic Budget Requests-Healthcare **(Patient Care Centers only)**
- Proposed Salary Increase Allocation
- Proposed Tuition Rate **(Colleges only)**

Note: You can disregard the ‘Process target date’ and ‘Final task due date’.
The due date shown within each task is the actual deadline by which the task must be completed.

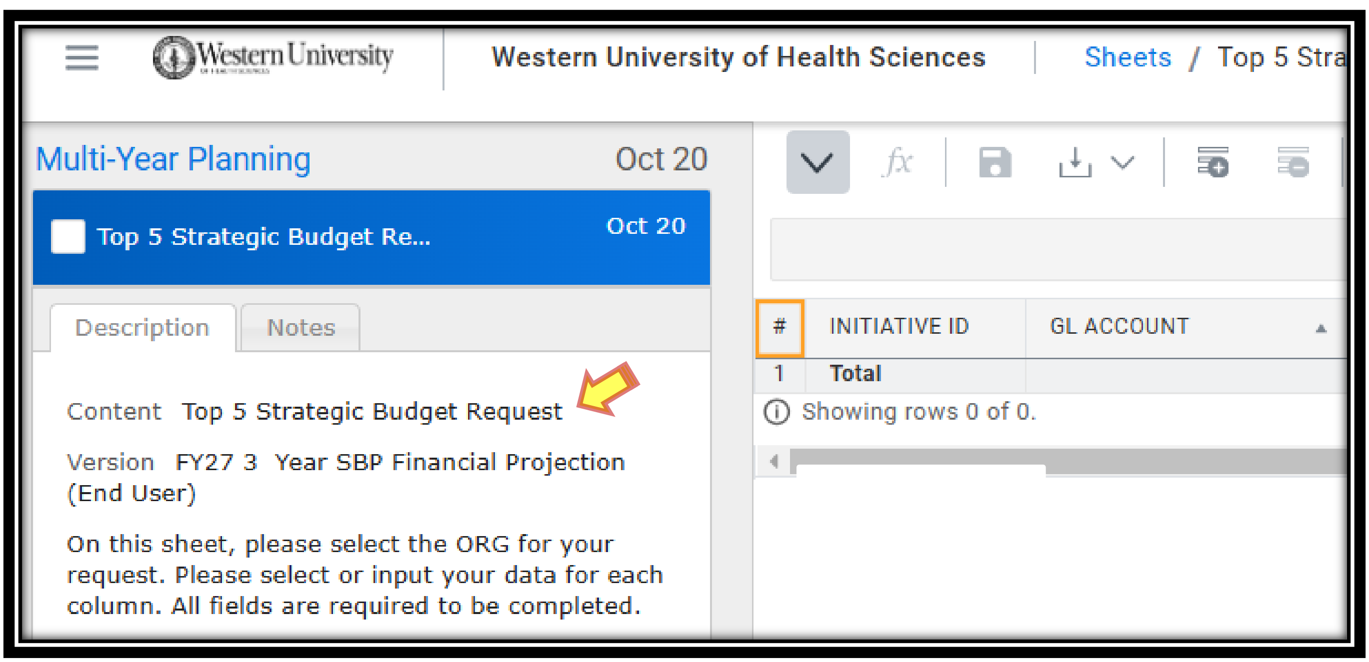


Section I: Accessing the Budget Request Sheet

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



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

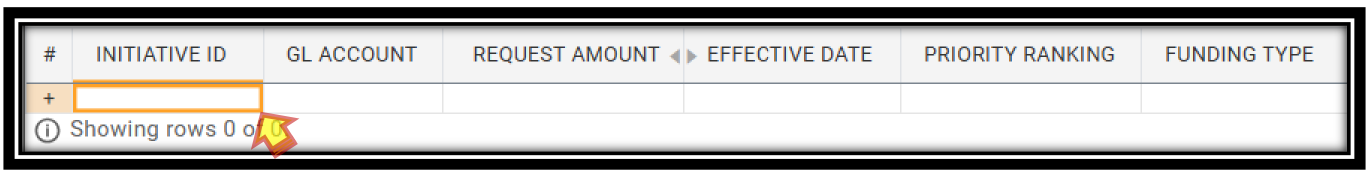


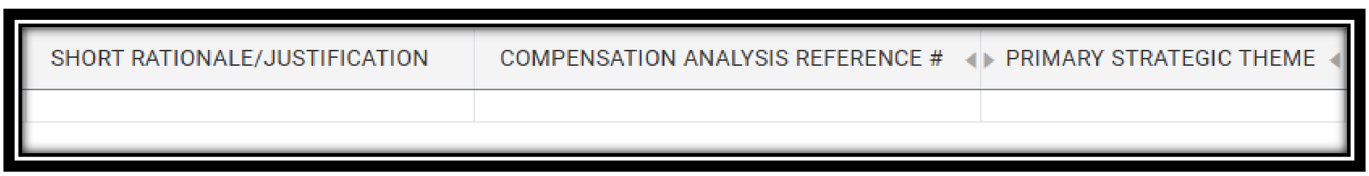
Section II: Creating Top Five Priorities

Step 1: Click **Add Row** icon towards the top of the screen.

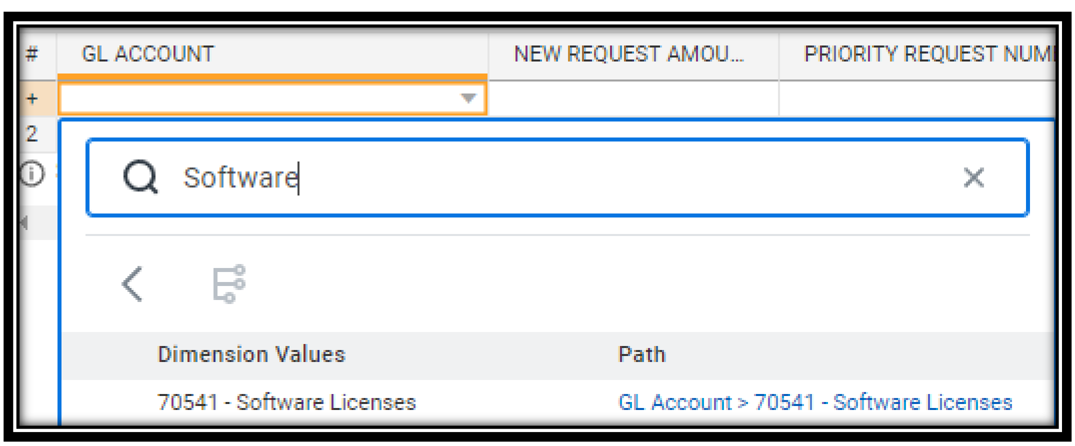
Step 2: Input the Initiative ID[1], GL Acct #, Request Amount, Effective Date, and Priority Ranking. Indicate under the Funding Type, whether the request is a one-time or ongoing need, provide a Compensation Analysis Reference #[2] (new positions & position modifications only). Indicate the primary strategic theme and provide a short rationale/justification.

Note 1: The Initiative ID must be the same as the ID used on your Strategic Initiatives List Sheet.
Note 2: The Compensation Analysis Reference # will be provided by HR/Compensation, via email.

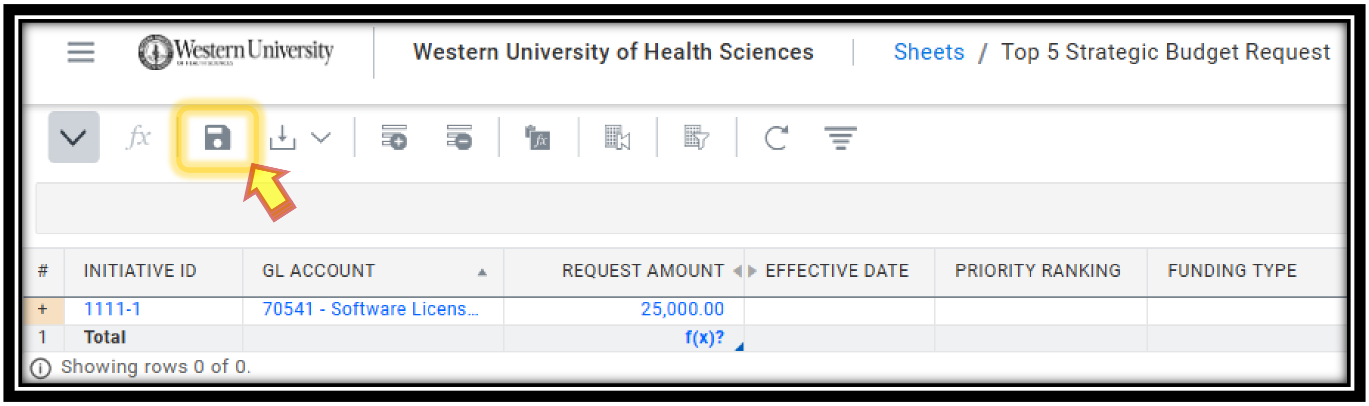




By hovering over a cell, a small arrow icon will appear. Click the icon to open a window where you can search for an account number by its title.

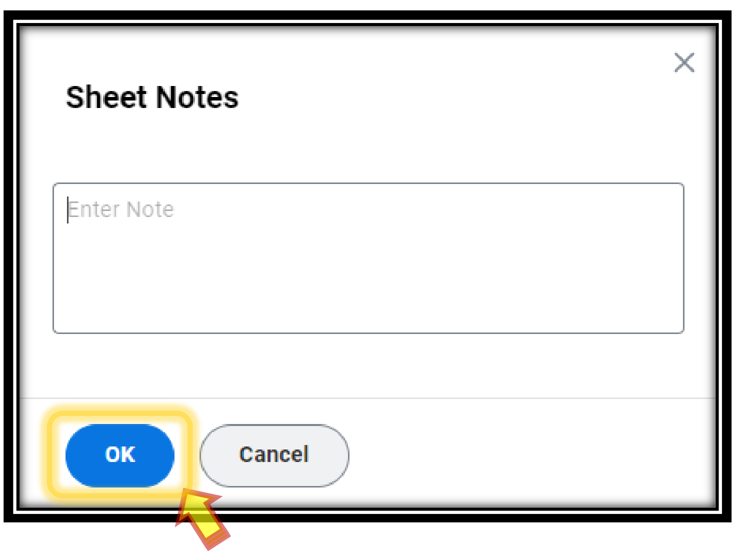


Step 3: Click the **Save** icon to save your work. Be sure to do this often, as the system does not save automatically.



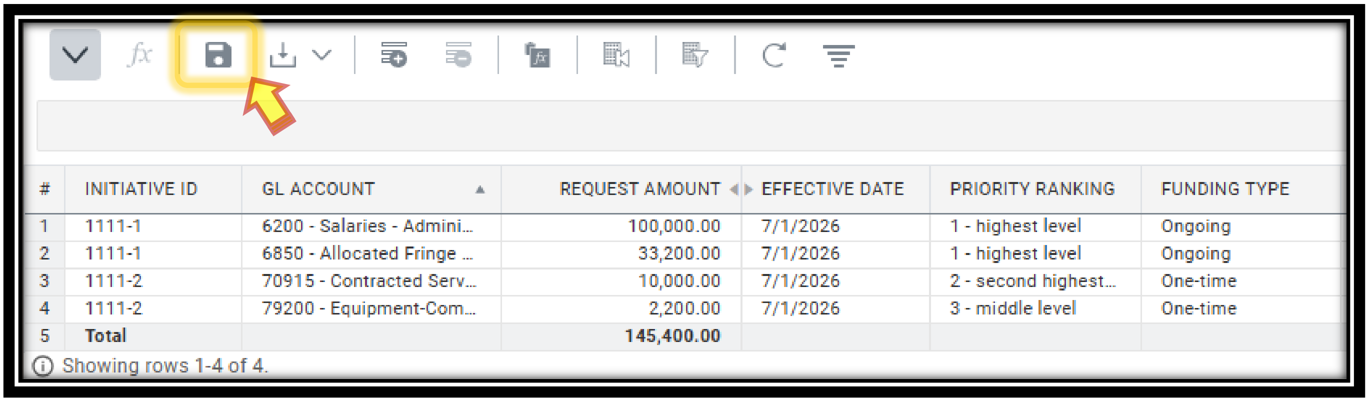
Step 4: Repeat Steps 1 and 2 until you have entered all five requests.

Step 5: If you need to add any additional notes, click the icon in the top-right corner of the window. Click **OK**.



If you need to include additional files as backup documentation, please save them to the shared W:drive.

Step 6: After reviewing and completing your entries, click the **Save** icon again.
The text will change from blue to black to indicate it has been saved.

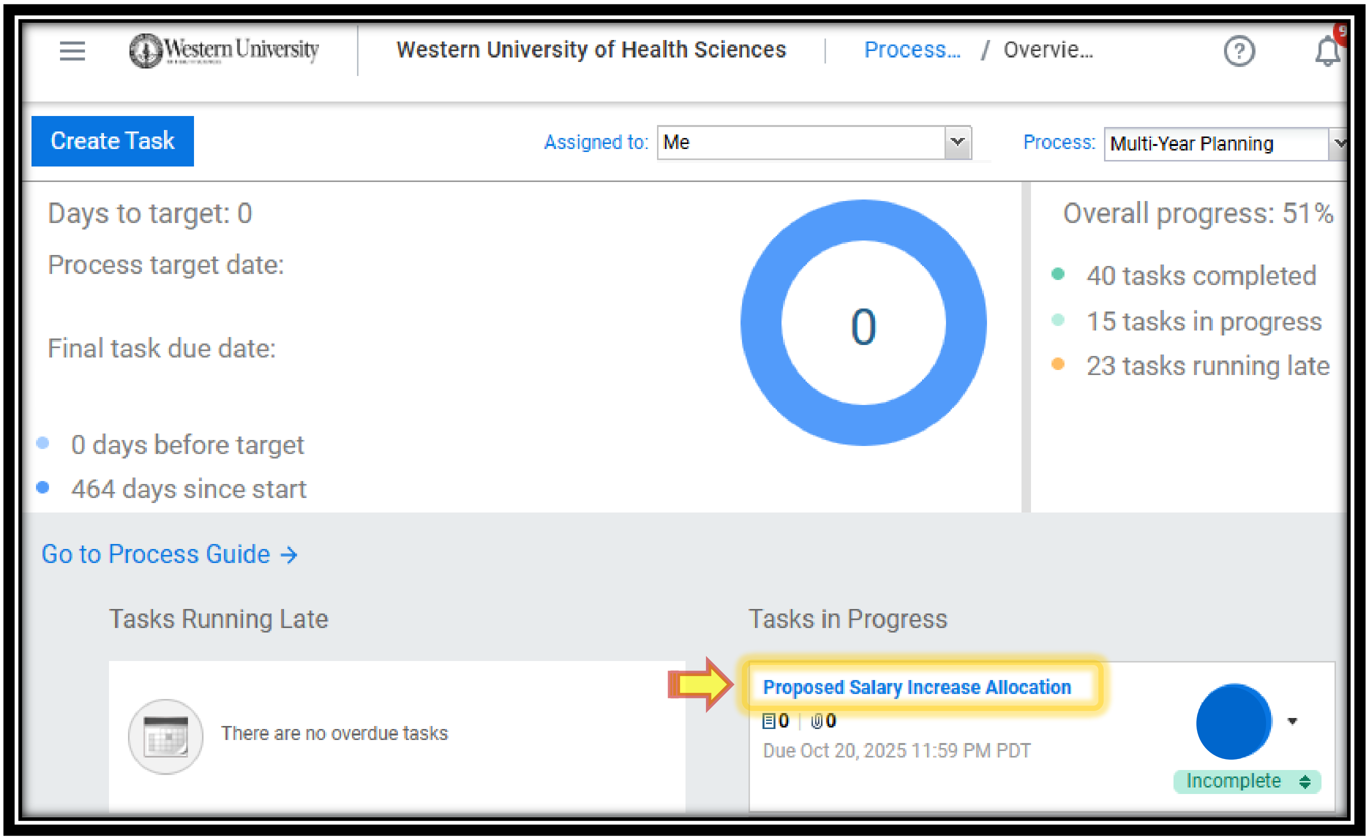


#	INITIATIVE ID	GL ACCOUNT	REQUEST AMOUNT	EFFECTIVE DATE	PRIORITY RANKING	FUNDING TYPE
1	1111-1	6200 - Salaries - Admini...	100,000.00	7/1/2026	1 - highest level	Ongoing
2	1111-1	6850 - Allocated Fringe ...	33,200.00	7/1/2026	1 - highest level	Ongoing
3	1111-2	70915 - Contracted Serv...	10,000.00	7/1/2026	2 - second highest...	One-time
4	1111-2	79200 - Equipment-Com...	2,200.00	7/1/2026	3 - middle level	One-time
5	**Total**		**145,400.00**			

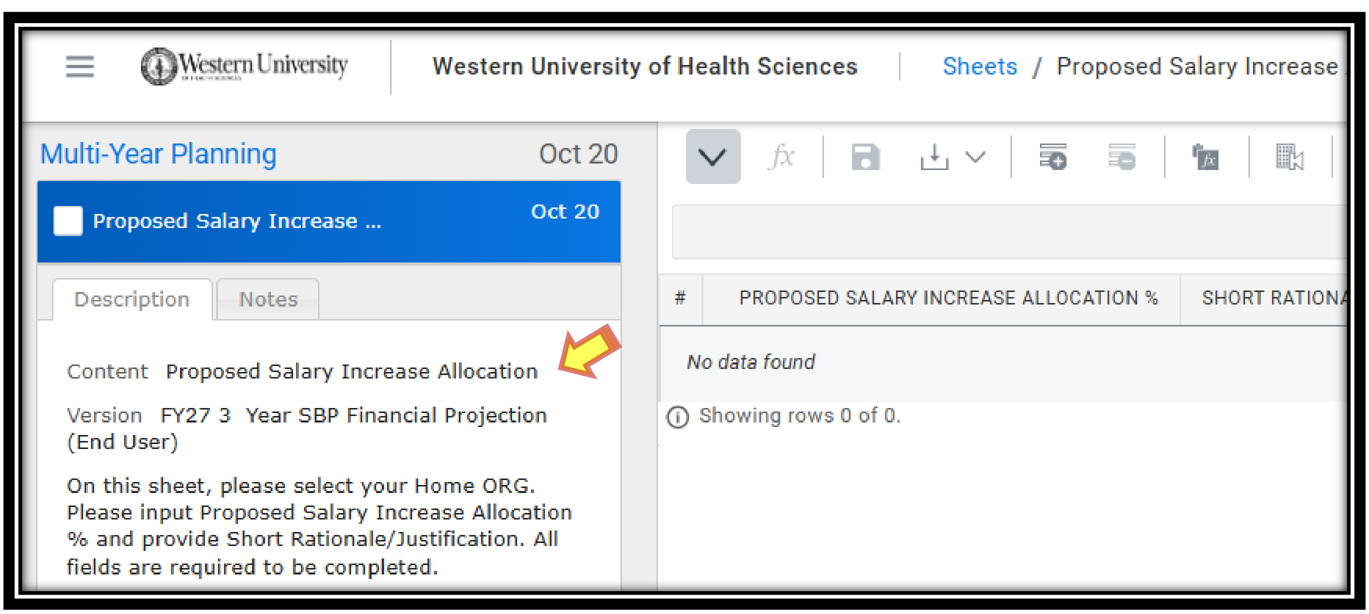
Showing rows 1-4 of 4.

Section III: Accessing the Proposed Salary Increase Allocation Sheet

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

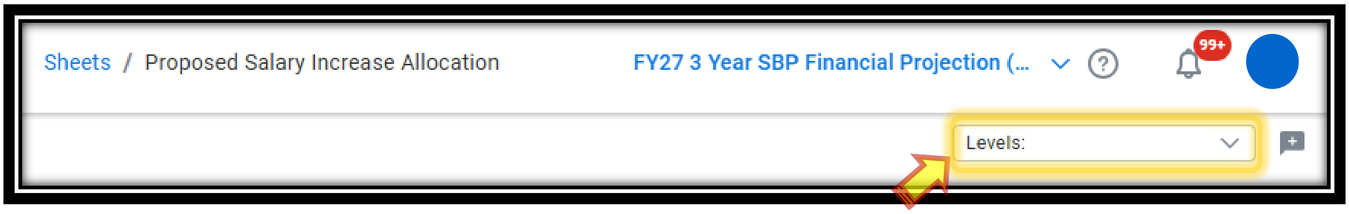


Step 2: Review the **Description** provided on the left side of the sheet.



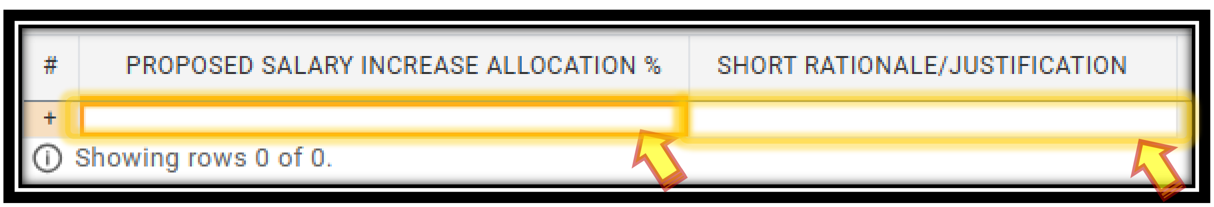
Section IV: Completing the Proposed Salary Increase Allocation Sheet

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



Step 2: Click the **Add Row** icon towards the top of the screen.

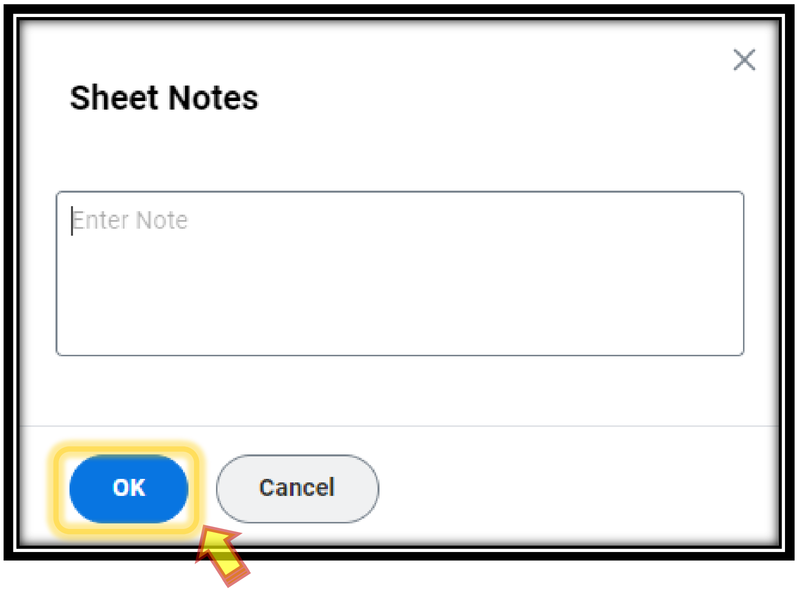
Step 3: Enter the salary increase allocation percentage and provide a rationale in the corresponding columns.



Click on a cell to input information.

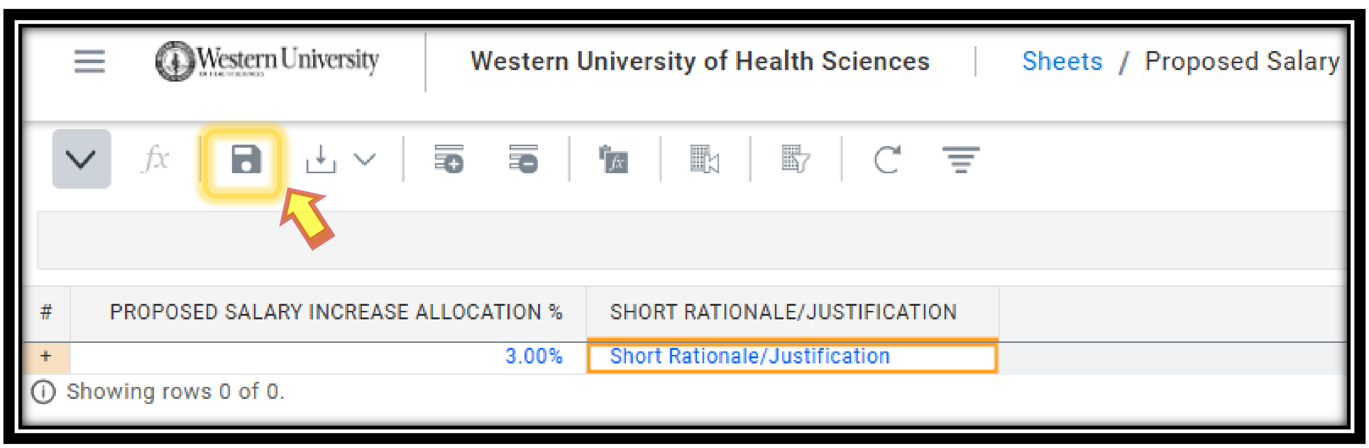
Note: You do not need to include the "%" when entering a rate (number) into the Proposed Salary Increase Allocation % field.

Step 4: If you need to add any additional notes, click the  icon in the top-right corner of the window. Click **OK**.

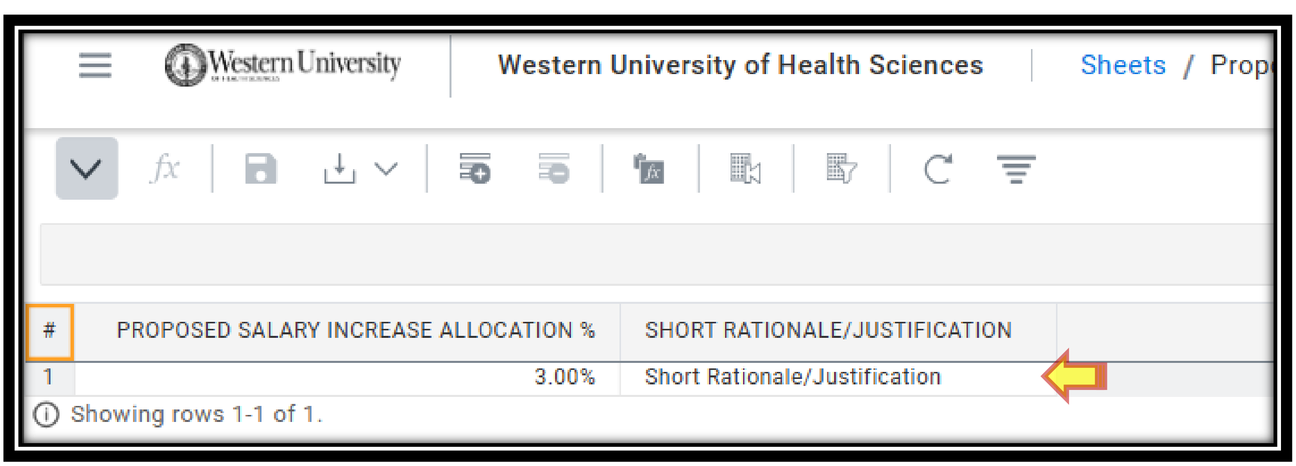


If you need to include additional files as backup documentation, please save them to the shared W:drive.

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

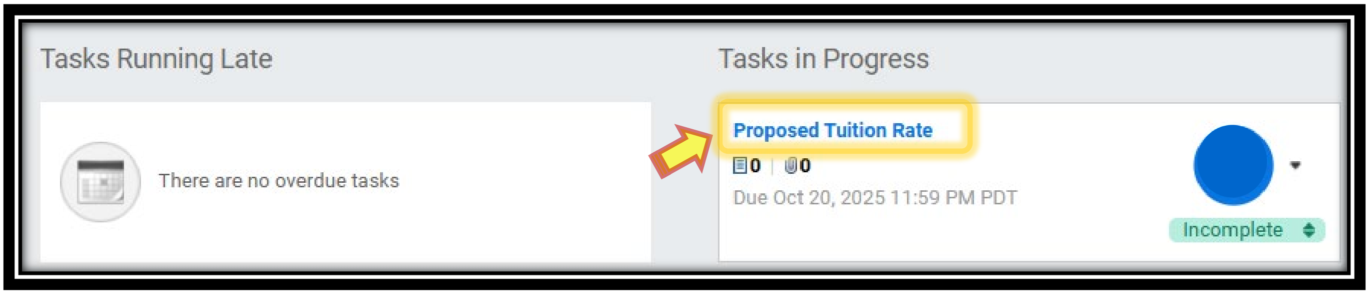


The text will change from blue to black to indicate it has been saved.

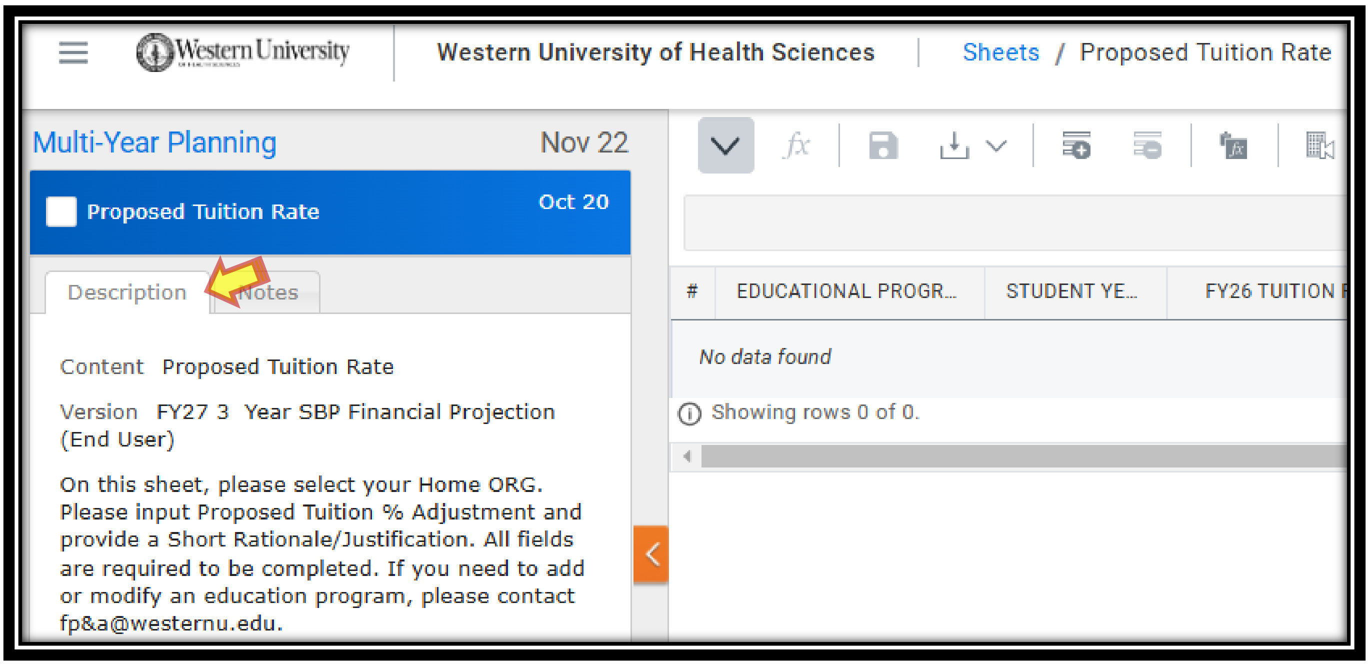


Section V: Accessing Proposed Tuition Rate Sheet

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

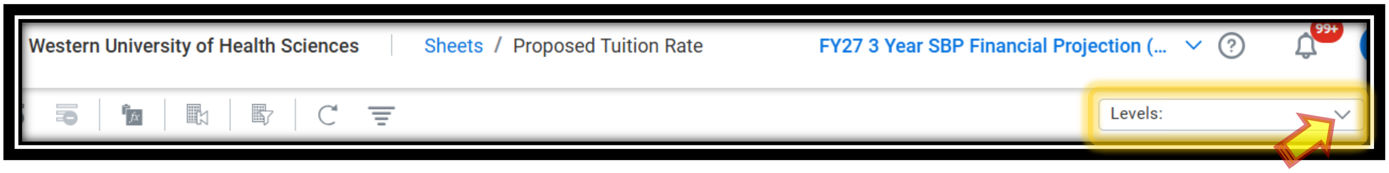


Step 2: Review the **Description** provided on the left side of the sheet.

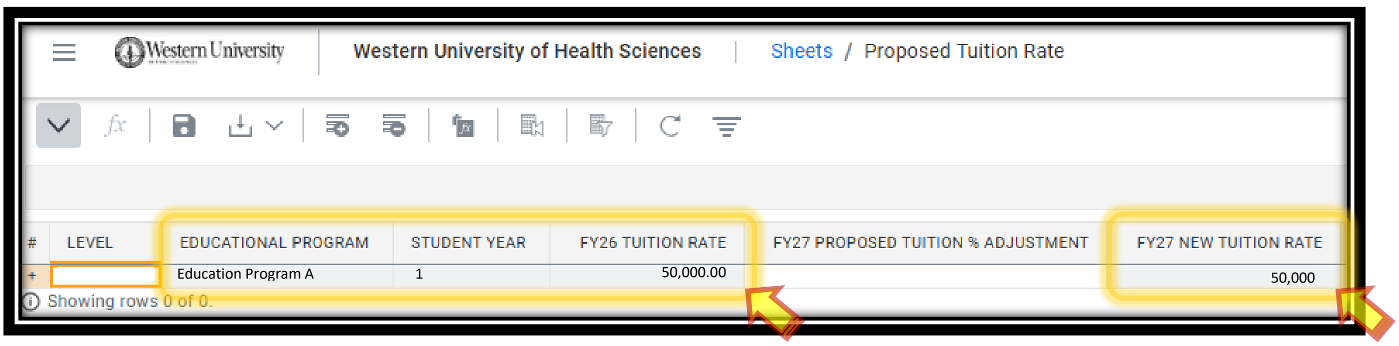


Section VI: Completing the Proposed Tuition Rate Sheet

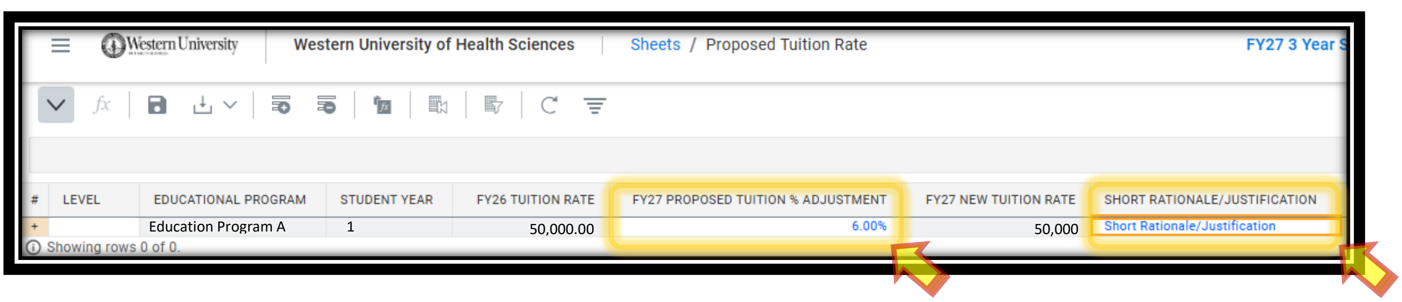
Step 1: Select your Home Org from the Levels dropdown list.



Note: Information under the Educational Program, Student Year, FY26 Tuition Rate and FY27 New Tuition Rate fields will automatically populate based on the current data.

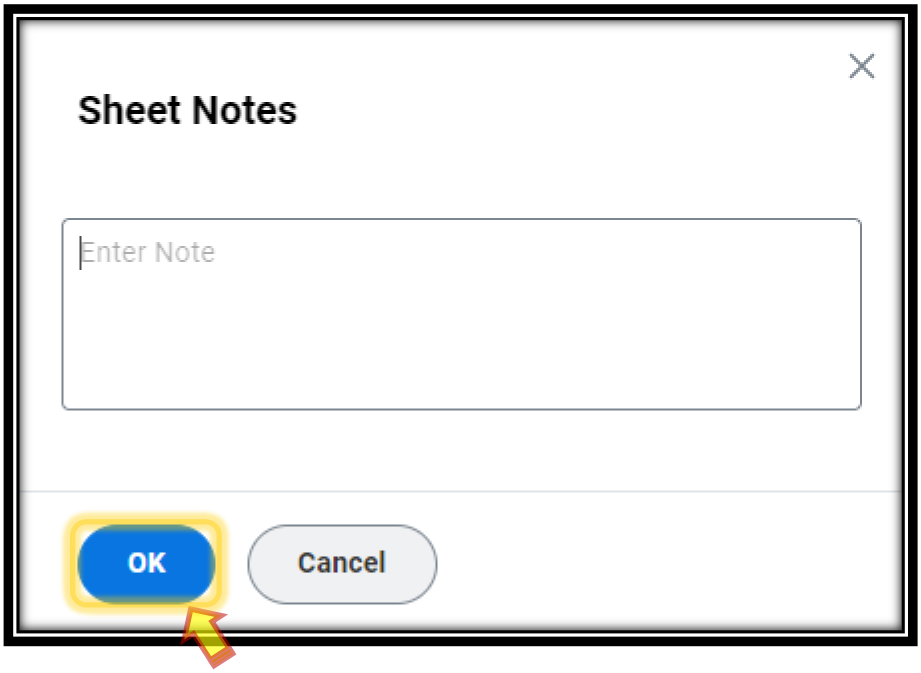


Step 2: Click on the cell to enter your FY27 Proposed Tuition % Adjustment rate and complete the Short Rationale/Justification field. After entering this information, click the **Save** icon, and the new tuition rate will be calculated automatically.



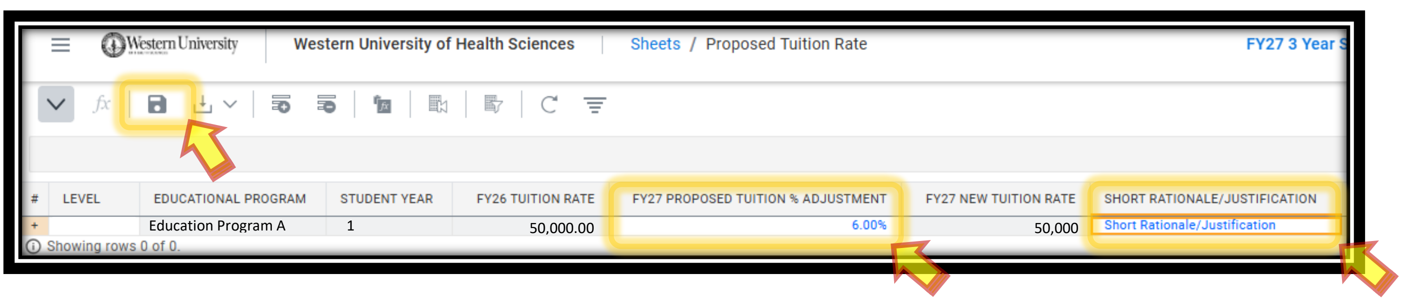
Note: You do not need to include the "%" when entering a number into the FY27 Proposed Tuition % Adjustment field.

Step 3: If you need to add any additional notes, click the icon in the top-right corner of the window. Click **OK**.

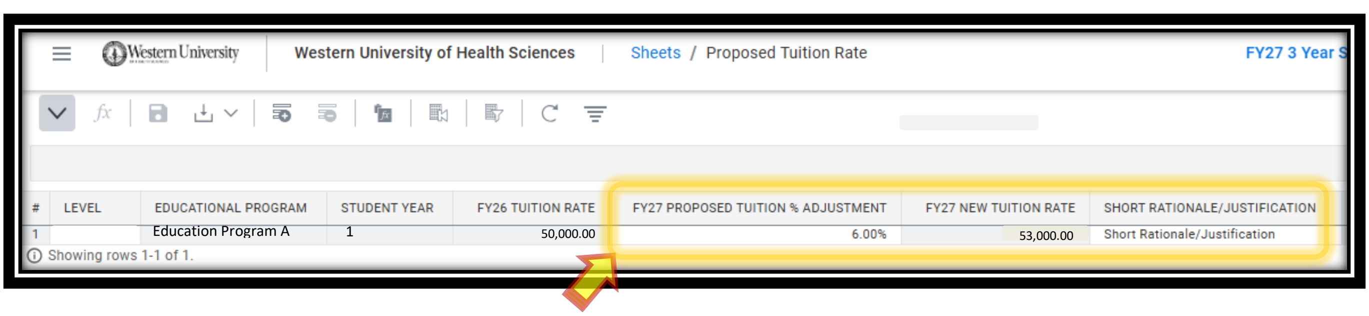


If you need to include additional files as backup documentation, please save them to the shared W:drive.

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



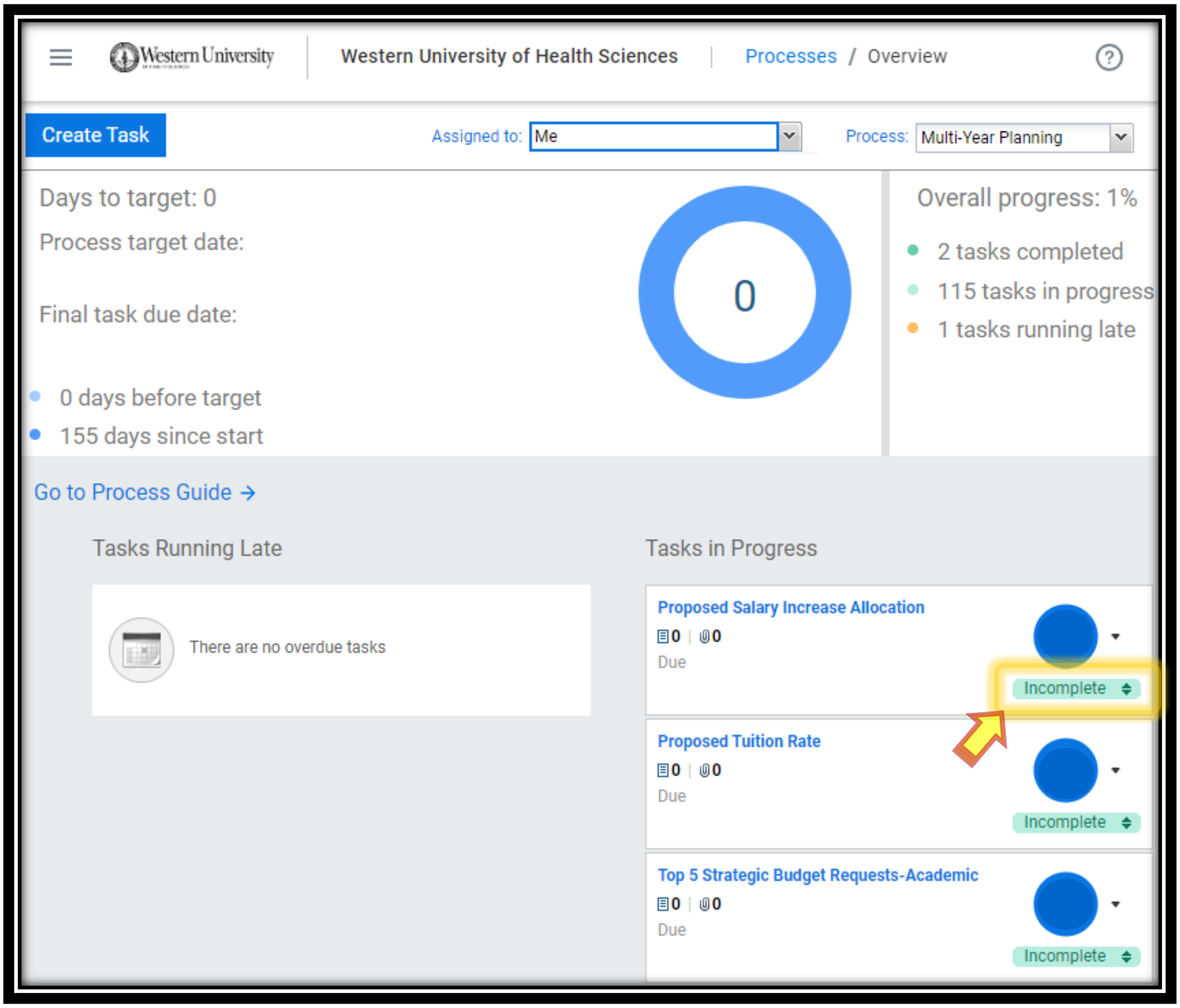
The text will change from blue to black to indicate it has been saved, and the FY27 New Tuition Rate will adjust.



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 the **Incomplete** button to mark a Task as completed.



The completed task will automatically move to the “Tasks Completed” column.