

Overview

Use this job aid as a resource to view and make changes to the budgets for the upcoming Fiscal Year.

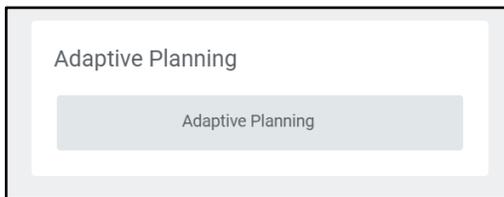
Access Workday Adaptive Planning Budget Sheets

To access budget sheets in Workday Adaptive Planning, do the following:

1. On the Workday Home Page, click the **View All Apps** link on the right. A menu appears on the left. You may have to scroll down and then click the **Adaptive Planning** app.



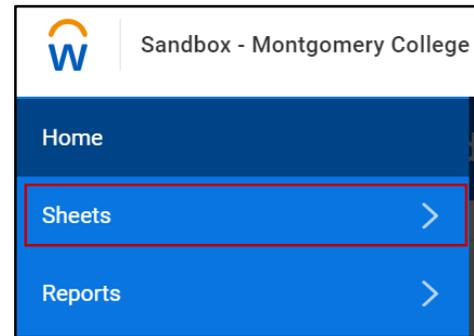
2. Click on the **Adaptive Planning** button.



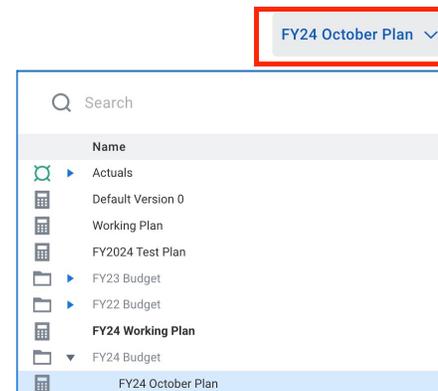
3. The Adaptive Planning welcome page appears. Click on the Global Navigation menu icon in the top left corner.



4. A menu appears, click **Sheets**.



5. Go to the top right and click the drop-down arrow to select a version. Select **FY24 October Plan**.



6. Click the appropriate sheet to enter your data.

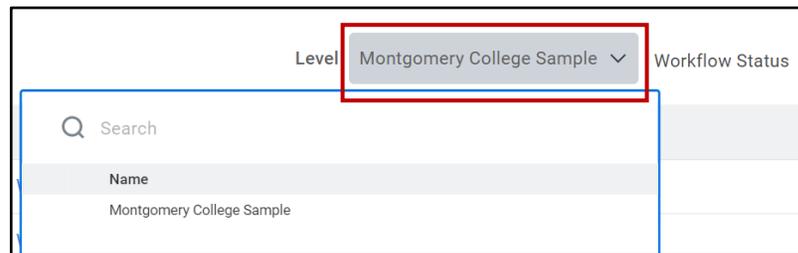


Non-Labor Expenses W/O Spend Category contains ledger expense categories that start with 6 such as contracted services, supplies, conference and meetings etc.

Labor Expenses with Spend Category contains labor and benefit ledger/spend category expenses.

Note: *Adjustments should only be made to spend categories 5302, 5303 and 5401 for operating funded budgets or FUND 1110.*

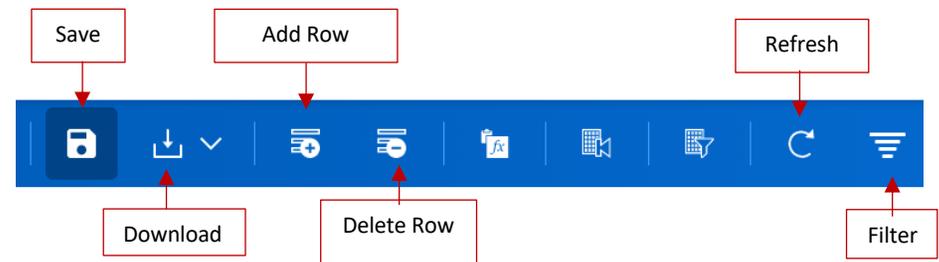
7. Then go to the Level drop down arrow and select the appropriate Cost Center.



Note: You will only see the department Cost Centers that you have access to.

Making Changes to Cost Center Budget Sheets

Review the Worksheet Tool bar



SAVE – Once all changes have been made to cost center click on save.

DOWNLOAD – Can be used to download to an excel spreadsheet.

ADD ROW – If a NEW ledger account or spend category will be added this will insert a row for that input

DELETE ROW – Can be used to delete a budget sheet row where there is no data in the shaded gray area.

REFRESH – Can be used to reset the spreadsheet in the original format.

FILTER – Can be used to filter sheet elements such as ledger account, disciplines or funds.

To make changes to the cost center budget sheets in Adaptive Planning, do the following:

The existing budget will appear and then you will edit the **Change+/-** column.

FY22 ACTUA...	FY23 BUDG...	FY24 BUDGET - BASE	CHANGE +/-	PROPOSED BUD...	NOTES
100,000	100,000	100,000		100,000	
100,000	100,000	100,000		100,000	
100,000	100,000	100,000		100,000	
100,000	100,000	100,000		100,000	

Note: All values entered into the Change +/- must be explained in the note column. The note column (and other sheet columns) can be expanded by placing your cursor over the end of the cell to expand with the  symbol

To Add a Row: Click the Add Row icon  and complete each column. Be sure to include a note why the new budget request was needed.

To Delete a Row: Click the Delete Row icon . A delete row confirmation box will appear. Click **Delete**.

After making your changes in the Change +/- column you **must save** your changes. Click the save button. 

To download the spreadsheet, click the download button on the toolbar. Select the option to download or to download a printable view.

