

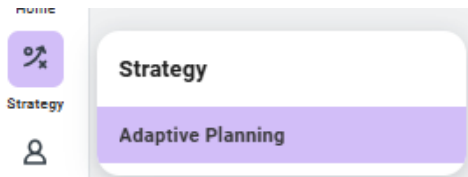
Overview

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

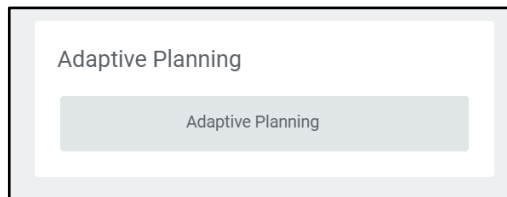
Access Workday Adaptive Planning Budget Sheets

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

1. On the Workday Home Page menu, hover over the **Strategy** icon and click **Adaptive Planning**. Note if you do not see the Strategy icon, it may be under the icon labeled More.



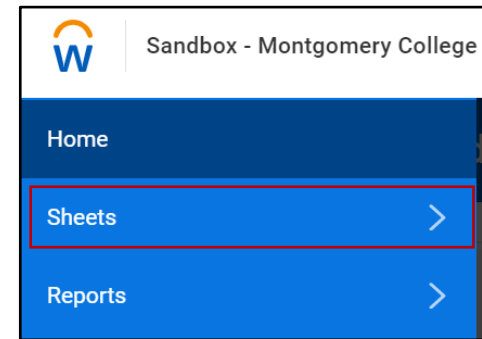
2. Click on the **Adaptive Planning** button.



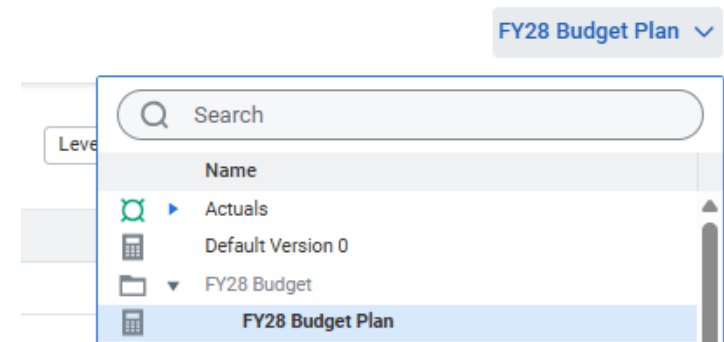
3. The Adaptive Planning welcome page appears. Click on the Global Navigation menu icon in the top left corner.



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



5. Go to the top right and click the drop-down arrow to select a version. Select **FY28 Budget Plan**.



Workday Adaptive Planning

Workday Job Aid for Cost Center Managers

6. Click the appropriate sheet to enter your data.

Non Labor Expenses W/O Spend Category
Labor Expenses With Spend Category

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.

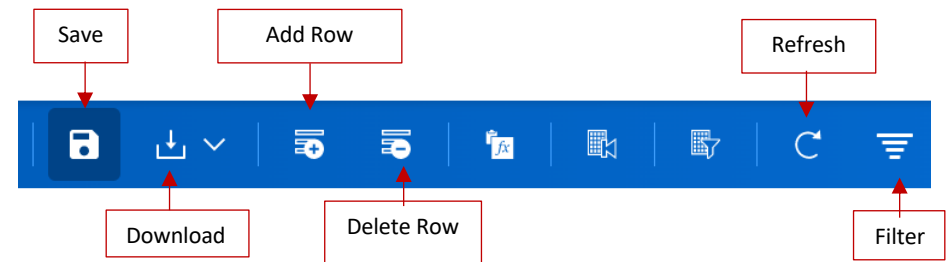
7. Then go to the Level drop down arrow and select the appropriate Cost Center.

Level	Montgomery College Sample ▼	Workflow Status
Search		
Name		
Montgomery College Sample		

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.

Workday Adaptive Planning

Workday Job Aid for Cost Center Managers

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.

FYxx ACTUALS	FYxx BUDGET	FYxx BUDGET - BASE	CHANGE +/-	PROPOSED BUDGET	NOTES
92912	32433	35634			
22012	52135	35634			
92912	22435	35634			
32912	32433	35634			
32912	32135	35634			

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

The values entered in the Change +/- column must be entered as whole numbers. Changes to the sheets cannot be saved if there are cells containing values that are not whole numbers.

FYxx BUDGET - BASE	CHANGE +/-	PROPOSED BUDGET
21,200		21,200
3,500		3,500
2,000	573.5	2,556
		0
		160,000
2,225		2,225
3,362		3,362
51,147		51,147

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.

