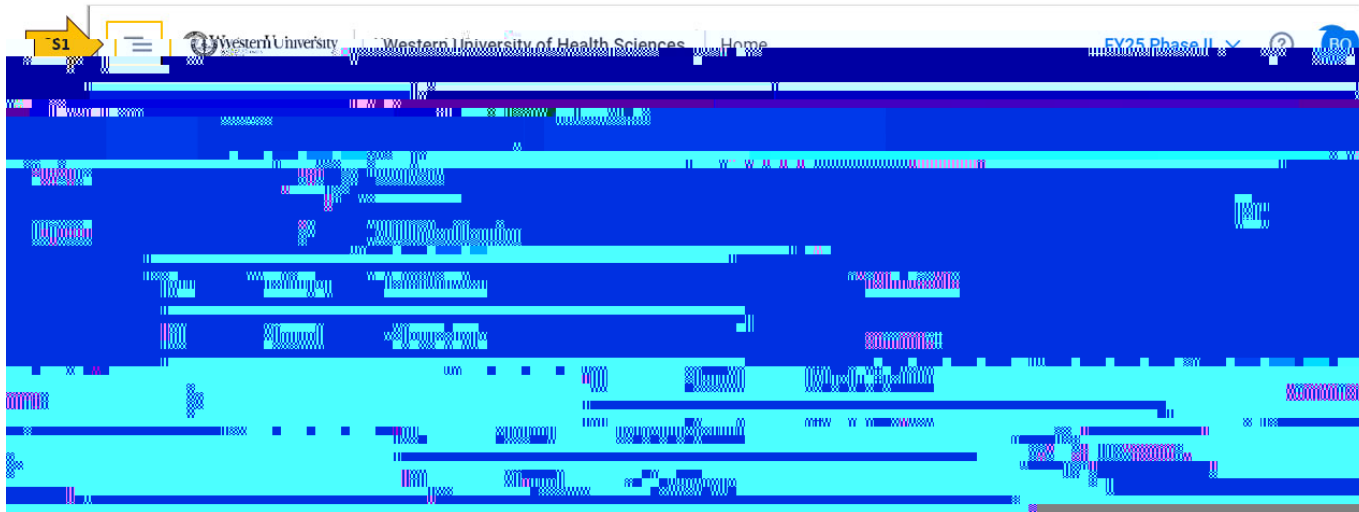


Section I: Accessing Phase II Budget Reallocation with Workday

Step 3: Once signed in, you will be taken to the landing home page.

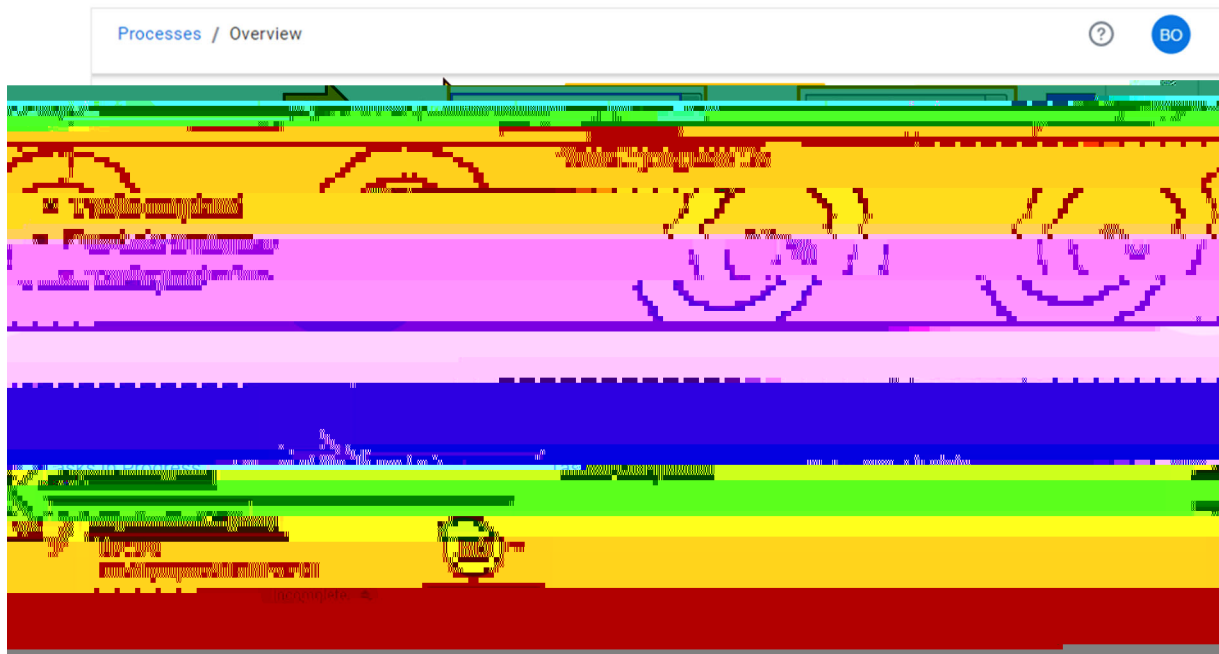
- S1. Click the global navigation menu on the top left corner.
- S2. Click the arrow to Processes.
- S3. Select Overview.



Step 4: The Overview will direct you to the Tasks Dashboard.

- S1: Select “Me”, so that you are only able to view your tasks. Confirm that the Process selected is “Multi-Year Planning”.
- S2: Complete the Budget Reallocation task listed under “Tasks in Progress” by due date specified.
- S3: To access each task, you will have to click on the [title link](#), “Budget Reallocation (FY25)”, and it will take you directly to the sheet required to be completed.

Note: To go back to task dashboard to view all tasks, select Processes from menu bar, as shown on previous step.



Section II: Phase II - Budget Reallocation (FY 2025)

Step 1: Once you have accessed the “Phase II – Budget Reallocation” sheet,

S1: Confirm you have selected FY25 Phase II

S2: Select ORG to view and reallocate funds

Note: You will not be able to edit columns at the rollup/Parent level. Only at the child/individual Org level.



Additional Information:

- At the rollup level, you will see information for all your departments/Orgs.
- Information provided by Workday includes Fund, Level/Org, GL Account, Actuals for the prior three years...etc.
- In Workday, you will have the ability to view **three years of historical actuals** data.

Note: You may still want to consider running a Budget vs Actual for FY24 to do an in-depth analysis.

Step 2: Entering the Budget Reallocation.

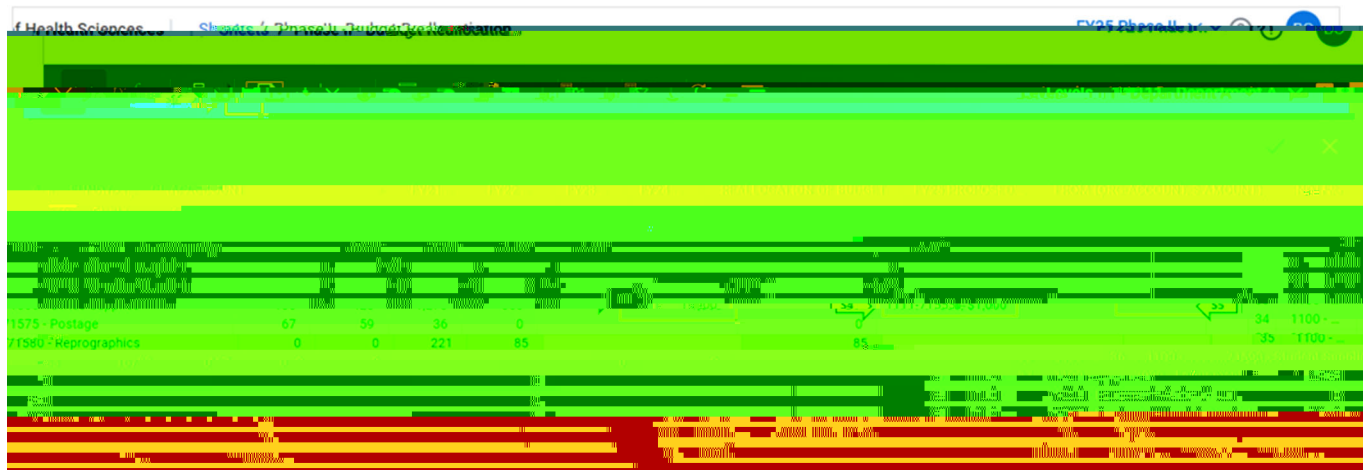
S3: Enter the increase/decrease (-) amount under the “Reallocation of Budget” column.

S4: When increasing budget, enter where funds are moving from and the amount in the “FROM (ORG-ACCOUNT, \$ Amount)” column.

S5: Additional information can be provided under the “Notes” column.

S6: Click the “Save” icon to calculate the changes. The new amount(s) will be reflected under “FY25 Proposed Budget”.

S7: Repeat steps 1 and 2 (S1-S6) for all Orgs you will be reallocating budget.



Section II: Phase II - Budget Reallocation (FY 2025)

Step 3: Reallocation Balancing.

S8: For reallocation balancing, please make sure the highest rollup level is selected to ensure that the reallocation total is equal to Zero.



Step 4: Completing the Task.

S9: Once you have completed your task, go to Processes menu bar (view Step 3). Click Incomplete Status and the status will change to Complete.

