

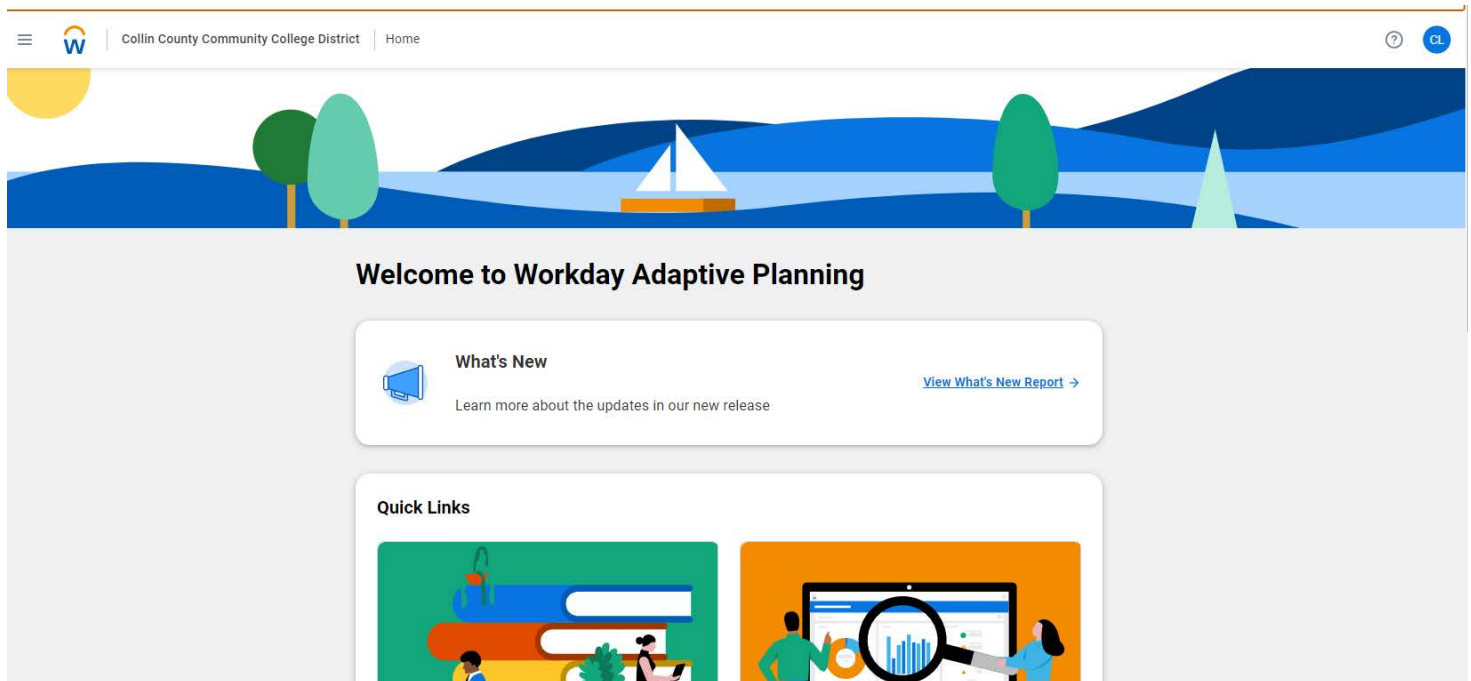
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# Annual Budget Development Guide

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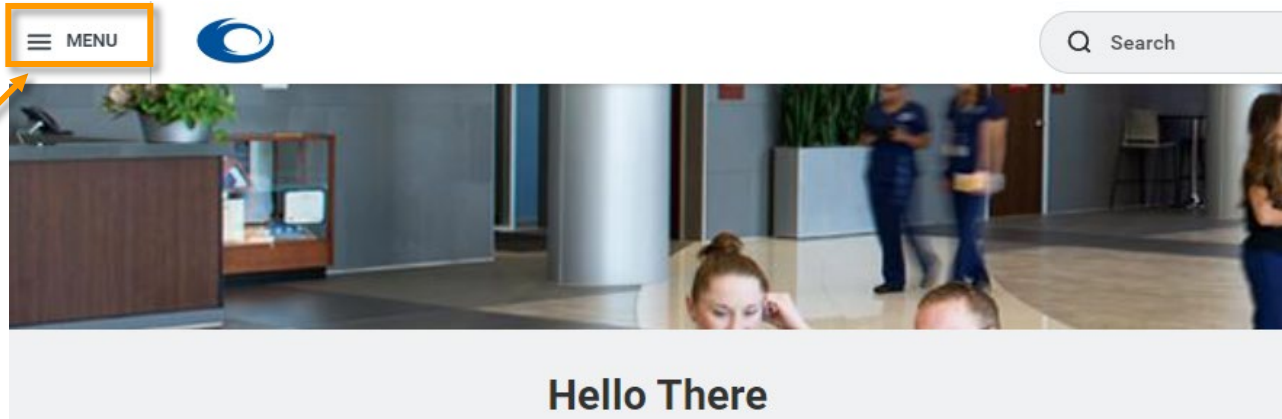
FY25 (2024-2025)

1. Accessing Adaptive
2. Accessing your Budget Sheets
  - a. Budget Detail Sheet
  - b. Personnel Sheet
  - c. Supplemental Sheet

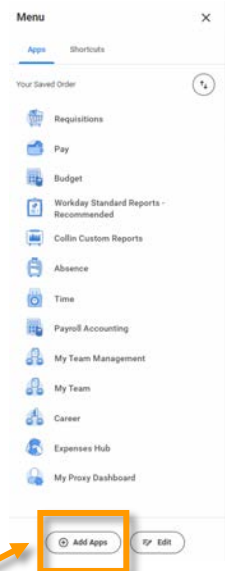


# 1. Accessing Adaptive

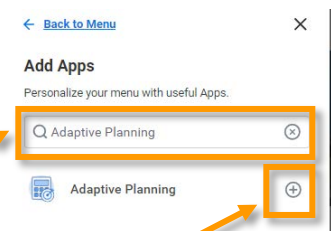
From the Workday home page click on Menu.



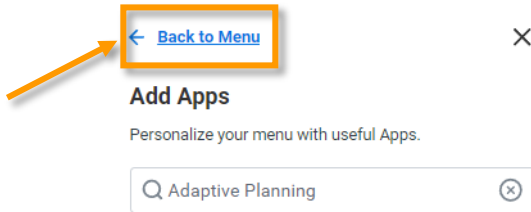
Click on Add Apps.



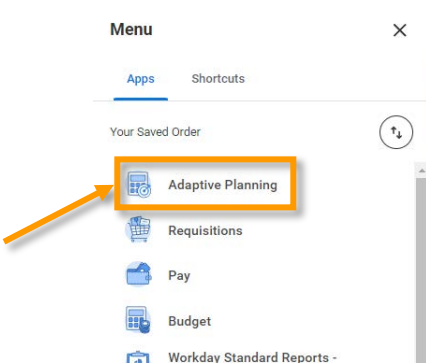
Type "Adaptive Planning" in the Find Apps box and click on the + sign.



Click on “Back to Menu”.



You should now see “Adaptive Planning” on your Menu. Click to access Adaptive Planning.



You can now access Adaptive Planning at any time by clicking on your Workday Menu and then Adaptive Planning.

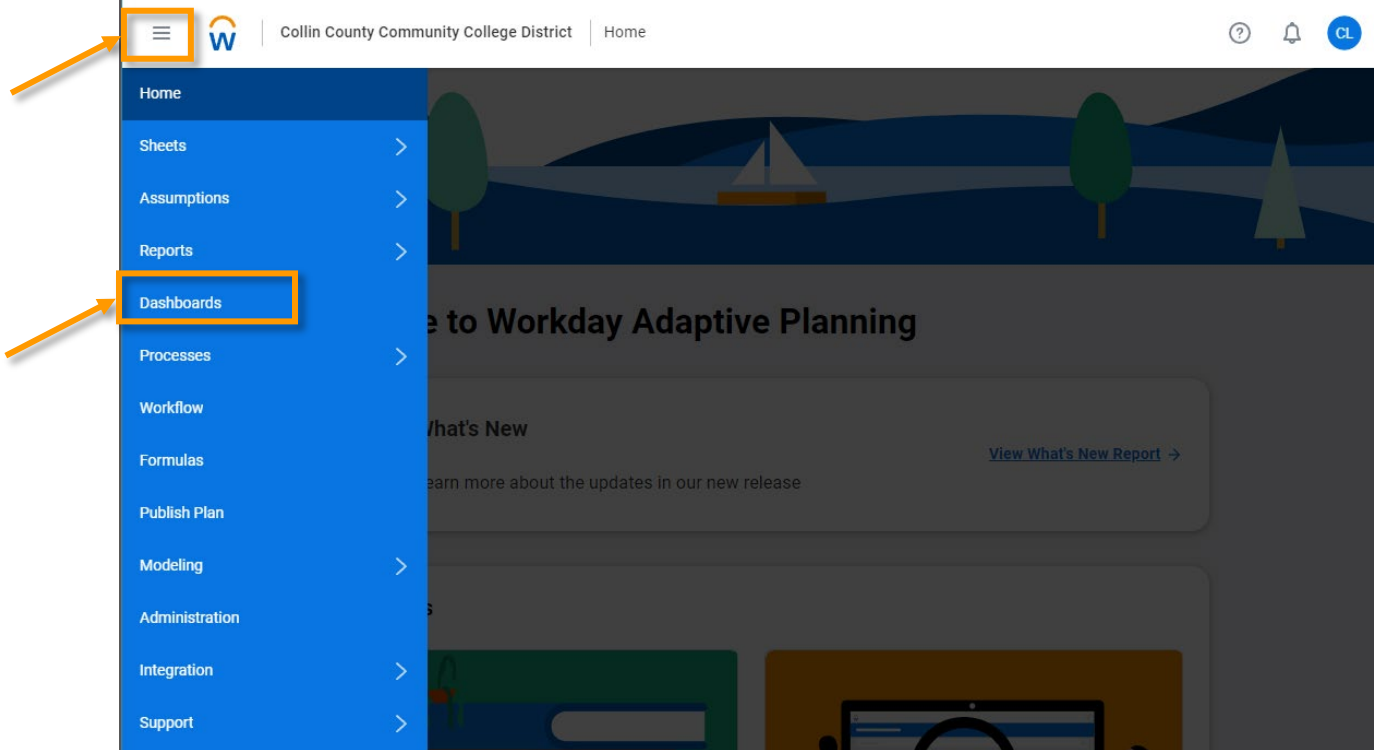
**\*\*If you are not able to find the app for “Adaptive Planning”, check to see if you already have it on your menu.**

**Alternatively, type “Adaptive Planning” into the Workday search bar to access the link to Adaptive if you do not want to add it to your menu.**

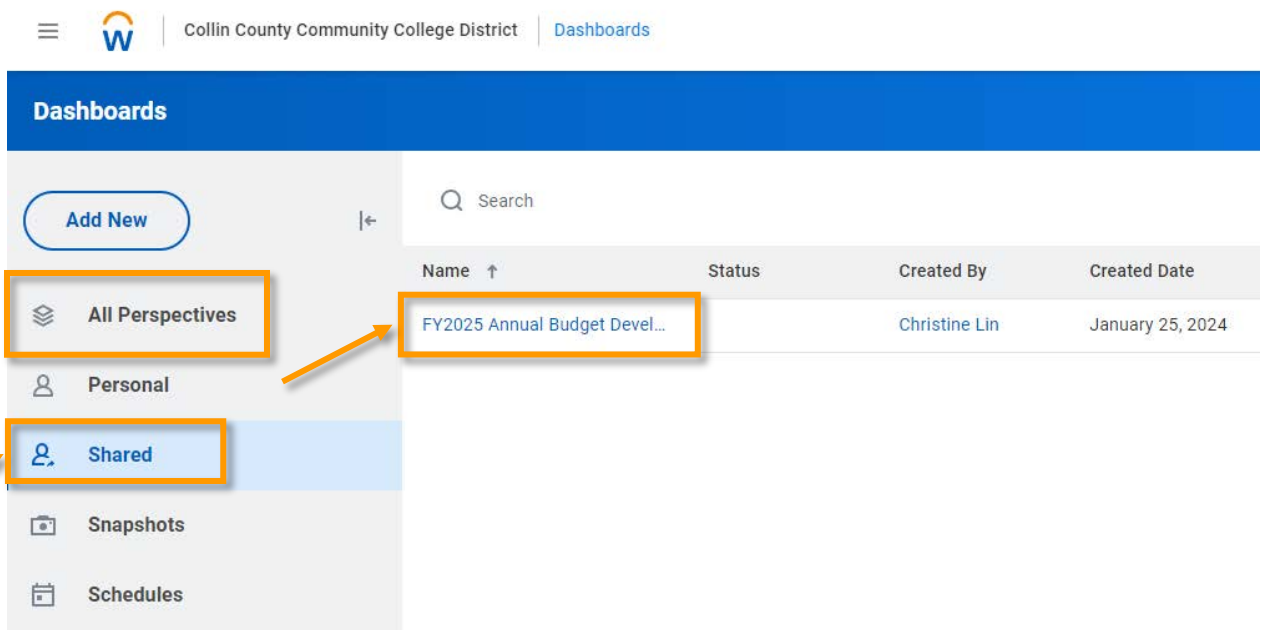
**If you still do not see it, email Christine Lin or Lenora Gray to grant you access.**

## 2. Accessing your Budget Sheets

From the Adaptive home page click on Menu, then click on “Dashboards”.



Click on “All Perspectives” or “Shared” and open the “FY2025 Annual Budget Development” dashboard.



Once you open the Dashboard, make sure to check the following:

- ✓ **Are you in the correct Version?**  
It should be “FY2025 Budget Development” (upper right corner).
- ✓ **Are you in the correct/highest Level (Cost Center Hierarchy)?**  
For those with access to multiple levels, you will need to toggle between them when reviewing/filling out your Budget Sheets.

There are 4 tabs:

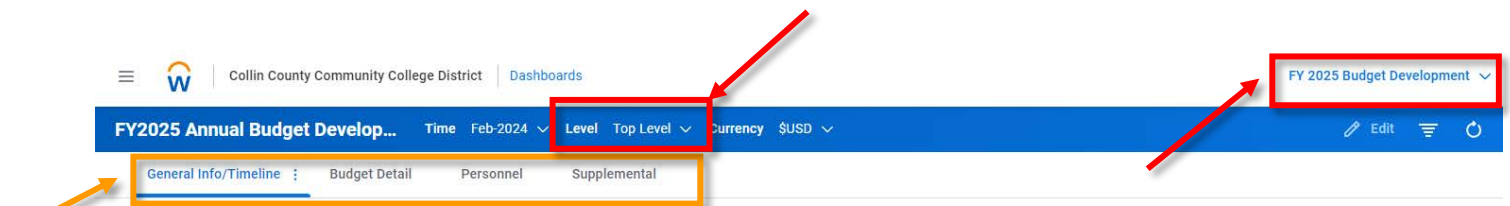
**General Info/Timeline:** This tab is where important information and dates will be listed.

**Budget Detail:** This tab is where you will go to view/edit your budget.

**Personnel:** If you have access to salary information, this tab is where you will review your personnel/open positions and leave comments to let us know of any changes.

**Supplemental:** This tab is where you enter any new supplemental requests.

See sections a-c below for instructions on how to fill out your budget sheets.



Make sure to always check the following:

Are you in the correct Version?

It should be “FY2025 Budget Development” (upper right corner).

Are you in the correct/highest Level (Cost Center Hierarchy)?

For those with access to multiple levels, you will need to toggle between them when reviewing/filling out your Budget Sheets.

The User Guide and Calendar files are saved in the Shared Reports folder and are linked on the Budget page in Workday.

**FY2025 Annual Budget Development Dates**

March 26-28, 2024

Budget Development Trainings

April 19, 2024

Personnel, Supplemental, and Budget Details due to the budget office by 5 PM

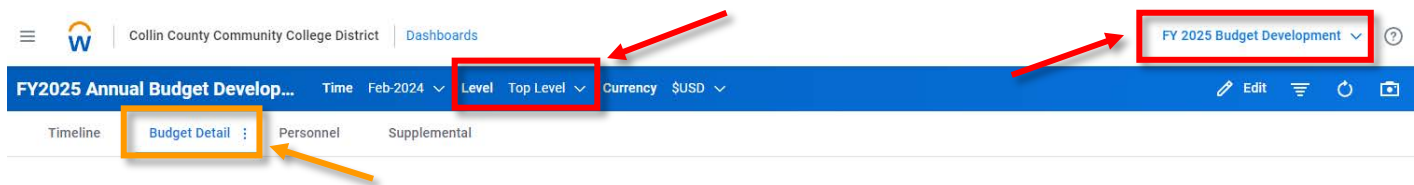
May 2024

Leadership Team members meet individually with Administrative Services to discuss their requested budgets

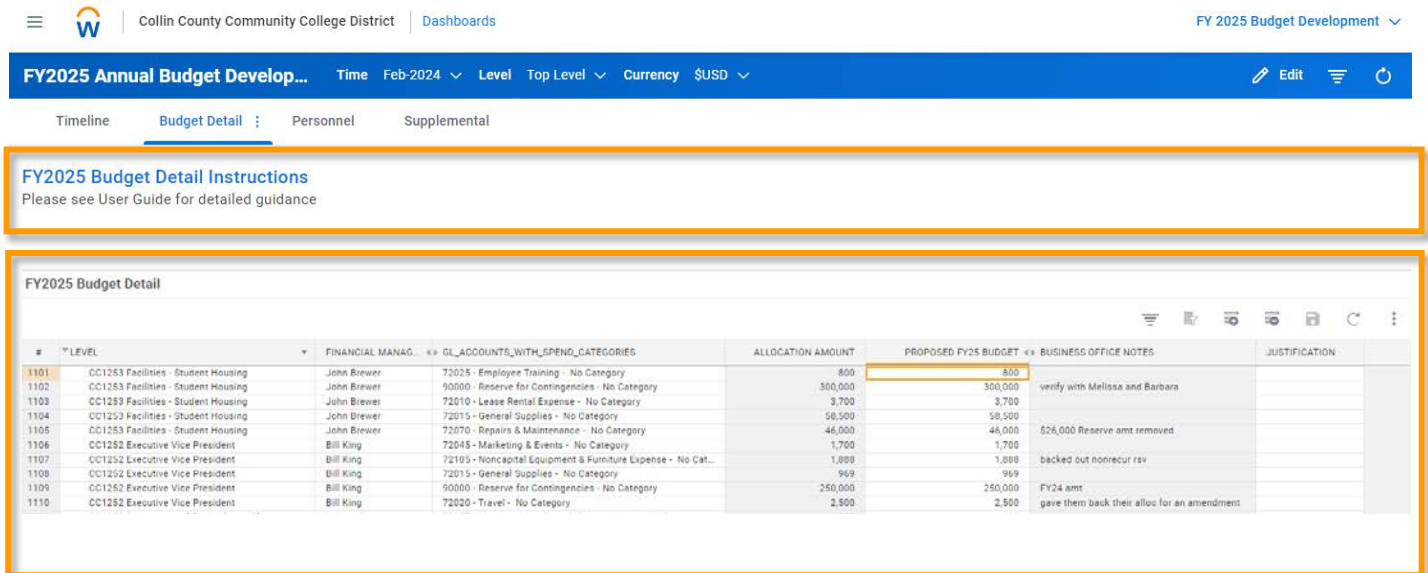
## a. Budget Detail Sheet

Click on the Budget Detail Tab

Ensure you are in the right Version and Level (For those with access to multiple levels, you will need to toggle between them when reviewing/filling out your Budget Sheets. Click outside of the selection box to apply your selection.)

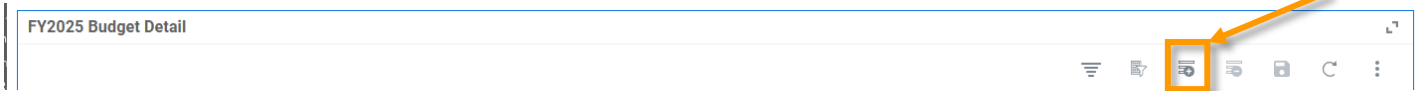


The top portion will have instructions, the bottom portion will be where you view or make changes to your budget.



The total of the Allocation Amount column is your allocation that you must tie to. While you are free to move budget between CCs and accounts during this process, we recommend waiting to make changes as needed after 9/1 via budget amendments. If you would like to shift funds now, please enter these amounts in the Proposed FY25 Budget column. Make sure you still tie to your total allocation amount at the bottom of the Allocation Amount column.

You can add rows to your Budget Detail sheet for missing Ledgers using the Add Rows button (plus sign). Please DO NOT delete rows as this will also delete the amount in the allocation column. Simply enter a “0” in the Proposed FY25 Budget column.



When adding a row, you can either use the drop-down menu for each field to fill out your information or begin typing your information and hit Enter.

You can also use the search bar at the top of each field’s drop-down menu to search your information and then click on the one you want to select.

#	LEVEL	FINANCIAL MANAG...	GL_ACCOUNTS_WITH_SPEND_CATEGORIES	ALLOCATION AMOUNT	PROPOSED FY25 BUDGET	BUSINESS OFFICE NOTES	JUSTIFICATION
1797	CC1016 Academic Affairs Dean - Frisco	Dawn Richardson	72020 - Travel - No Category	3,855	3,855		
1798	CC1016 Academic Affairs Dean - Frisco	Dawn Richardson	72057 - Memberships, Dues & Subscriptions - No Category	145	145		
1799	CC1016 Academic Affairs Dean - Frisco	Dawn Richardson	72045 - Marketing & Events - No Category	8,100	8,100		
1800	CC1016 Academic Affairs Dean - Frisco	Dawn Richardson	72005 - Contracted Vendor Services - No Category	1,000	1,000		
1801	CC1016 Academic Affairs Dean - Frisco	Dawn Richardson	72105 - Noncapital Equipment & Furniture Expense - No Cat...	500	500		
1802	CC1015 Academic Affairs Dean (2) - Plano	Kristen Streater	72005 - Contracted Vendor Services - No Category	5,530	5,530		
1803			al Supplies - No Category	23,985	23,985		
1804	cc1259		Capital Equipment & Furniture Expense - No Cat...	6,000	6,000		
1805			ting & Events - No Category	7,500	7,500		
1806			- No Category	3,700	3,700		
1807			erships, Dues & Subscriptions - No Category	500	500		
1808			acted Vendor Services - No Category	6,000	6,000		
1809			ting & Events - No Category	19,715	19,715		
1810			erships, Dues & Subscriptions - No Category	6,229	6,229		
1811			- No Category	190	190		
1812			- No Category	4,000	4,000		
1813			al Supplies - No Category	14,552	14,552		
1814			itation - No Category	10,000	10,000		
1815			ge - No Category	130	130		
1816			al Supplies - No Category	500	500		
1817			acted Vendor Services - No Category	5,000	5,000		
1818			ting & Events - No Category	2,100	2,100		
1819			- No Category	10,000	10,000		
1820			al Supplies - No Category	400	400		
1821			yee Training - No Category	1,100	1,100		
1822			ting & Events - No Category	1,000	1,000		
1823			- No Category	2,000	2,000		
1824			Capital Equipment & Furniture Expense - No Cat...	3,602	3,602		
1825	CC1003 (CAD) Computer Aided Drafting - Tech...	Michael Coffman	72015 - General Supplies - No Category	7,000	7,000		
1826	CC1003 (CAD) Computer Aided Drafting - Tech...	Michael Coffman	72020 - Travel - No Category	500	500		
1827	CC1003 (CAD) Computer Aided Drafting - Tech...	Michael Coffman	72005 - Contracted Vendor Services - No Category	6,698	6,698		
1828	CC1003 (CAD) Computer Aided Drafting - Tech...	Michael Coffman	72045 - Marketing & Events - No Category	750	750		
1829	Total			60,773,133	60,773,133		

Please fill out all open fields/columns:

**Level:** The Cost Center you are budgeting for. (If you are already in a specific Level/Cost Center, this column may not show up in your display)

**Financial Manager:** The Cost Center Manager.

**GL Accounts with Spend Categories:** Select the ledger account via drop-down menu; you can also use the search bar in the drop-down menu or type in your information directly into the cell and hit Enter. You can budget by Ledger Account or by Spend Category.

Example by Ledger Account:

#	FINANCIAL MANAGER	GL ACCOUNTS WITH SPEND CATEGORIES	ALLOCATION AMOU.	PROPOSED FY25 BUDG.	BUSINESS OFFICE NOTES	JUSTIFICATION
*	Kertha Carlton	72005 - Contracted Vendor Services - No Category		5,000		
1	Total		0	5,000		

Example by Spend Category:

#	FINANCIAL MANAGER	GL ACCOUNTS WITH SPEND CATEGORIES	ALLOCATION AMOU.	PROPOSED FY25 BUDG.	BUSINESS OFFICE NOTES	JUSTIFICATION
*	Kertha Carlton	72005 - Contracted Vendor Services - SC1080 Printing Expense		2,000		
*	Kertha Carlton	72005 - Contracted Vendor Services - SC1074 General Contracted Services		3,000		
1	Total		0	5,000		

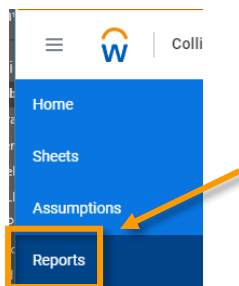
**Allocation Amount:** This field is auto-populated by the Budget Office. For FY25 Annual Budget Development, this will be your allocation total. If you are adding a new line, this will be 0 since there is no allocation for that ledger account.

**Proposed FYXX Budget:** This column is for you to make your budget amount changes as needed but you must tie in total to your allocation.

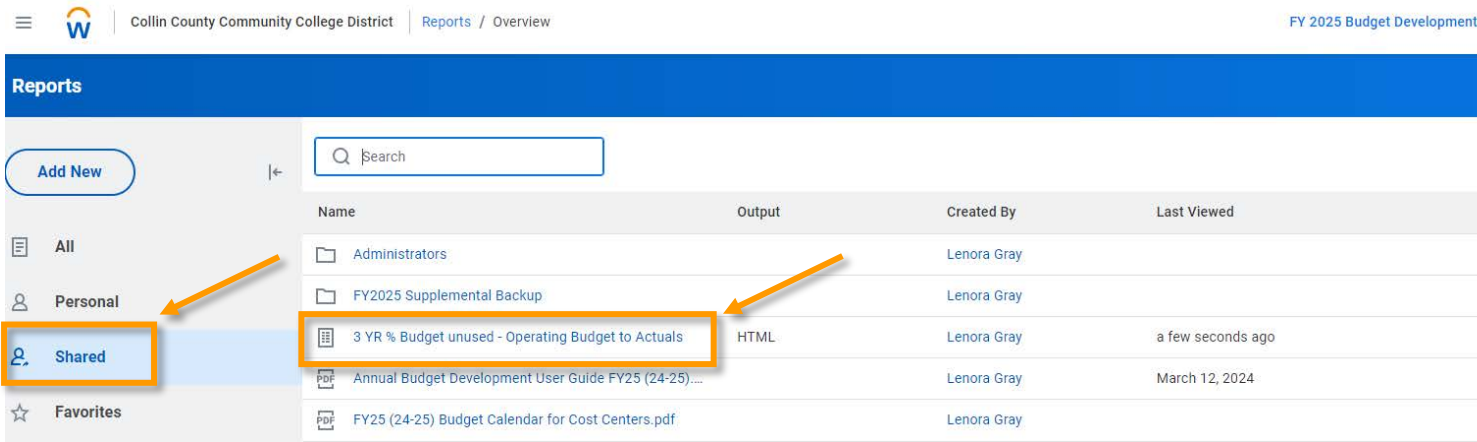
**Business Office Notes:** Budget Office has left any relevant notes, if applicable.

**Justification:** This is a free text field for you to let Leadership know your reasoning for your budget changes (if applicable).

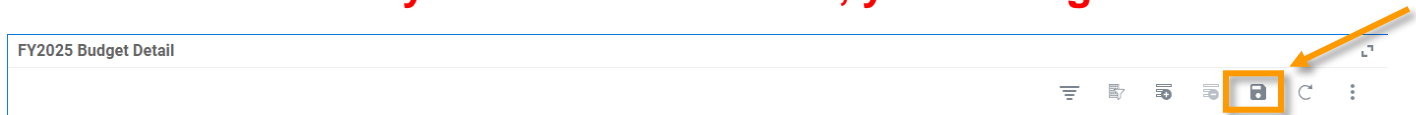
**You can use the shared report as reference for prior and current year budget and actuals. You can choose the level from the drop-down as needed. (Or use the Operating Budget to Actual Reports available in Workday via the Budget page):**



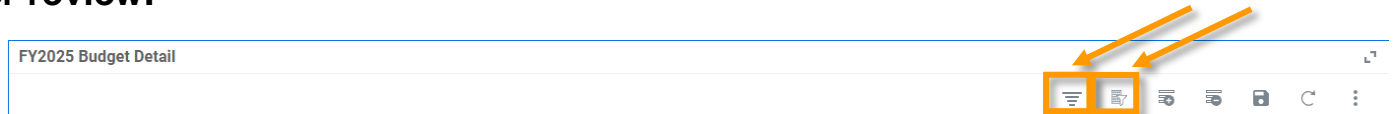




**\*\*\*Click Save button – if you do not click Save, your changes will be lost!!**



Once data is entered you may filter using the filter or display options buttons for easier review.



**Budget for Part-time Staff (60110), Student Assistants (60200), and Overtime (60305) will be added by the Budget Office at a later date.**

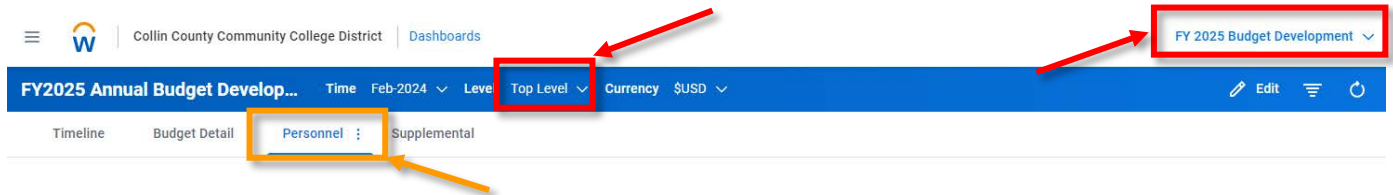
**Inform your supervisor when you have entered or finished reviewing your budget for the new fiscal year for their review.**

**Cost Center Managers, please inform Christine Lin and Lenora Gray when your final operating budget is ready for our review and include the total of your Proposed FY25 Budget column in your email.**

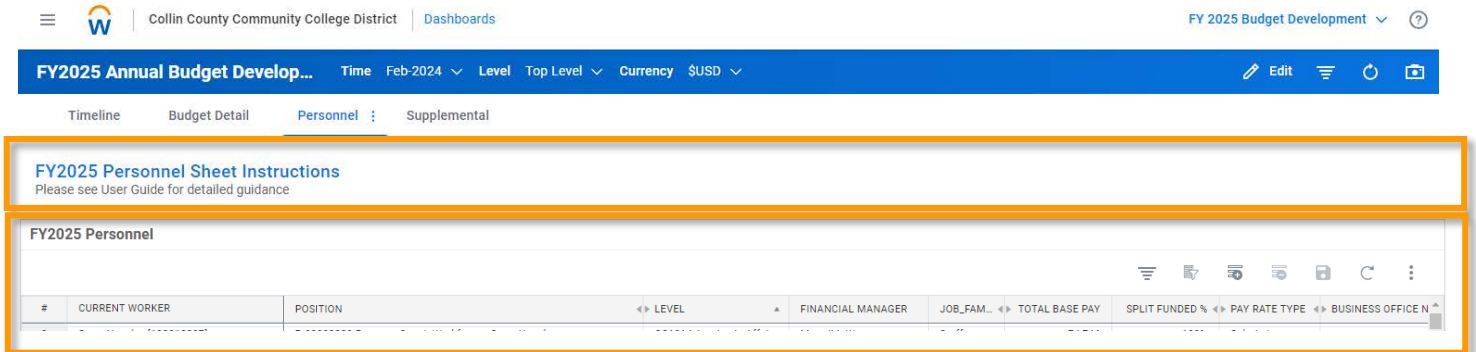
## b. Personnel Sheet

Click on the Personnel Tab

Ensure you are in the right Version and Level (For those with access to multiple levels, you will need to toggle between them when reviewing/filling out your Budget Sheets. Click outside of the selection box to apply your selection.)



The top portion will have instructions, the bottom portion will be where your personnel are listed.



If you are not able to see any data, have your Cost Center Manager email Lenora Gray and Christine Lin to give you access to salary information.

Columns:

**Current Worker:** The name of the employee. If it is blank, it is an open position.

**Position:** The position number, title, and employee name if filled.

**Level:** Cost Center

**Financial Manager:** Cost Center Manager

**Job Family Group:** Staff, Faculty, or Administrator

**Total Base Pay**

**Split Funded %:** % of an employee's pay divided between different CCs

**Pay Rate Type**

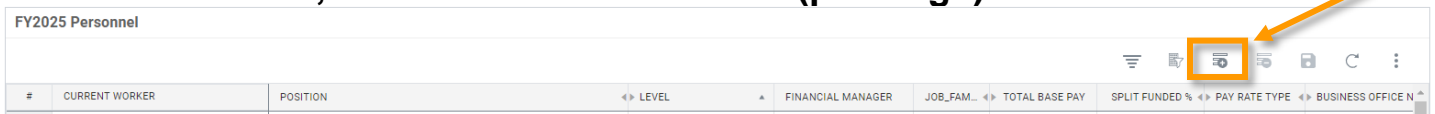
**Business Office Notes:** Budget Office has listed incumbents or any relevant notes on a position, if applicable.

**Cost Center Updates:** Please use this column for any helpful notes/updates for the Budget Office.

**Budget FY25?:** Review each employee and open position line and use this column to let the Budget Office know whether or not to budget that position. Please fill this column out for each line as verification that all positions have been reviewed.

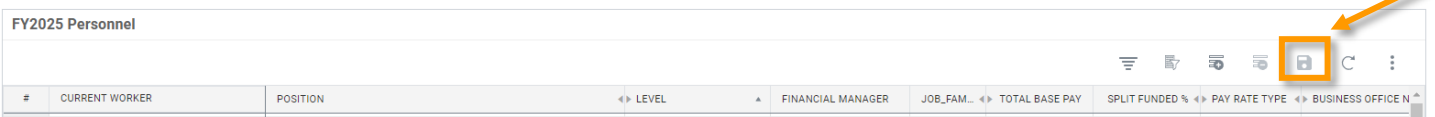
**If a position or person is missing or there is a newly approved position, please add a new line and leave notes in the “Cost Center Updates” column for us to review.**

**To add a new line, use the Add Rows button (plus sign).**



**You should not need to use the Delete Rows button (minus sign). Please add a note if a position is ending and check the appropriate “budget FY25?” box.**

**\*\*\*Click Save button – if you do not click Save, your changes will be lost!!**



**You may filter using the filter or display options buttons for easier review.**



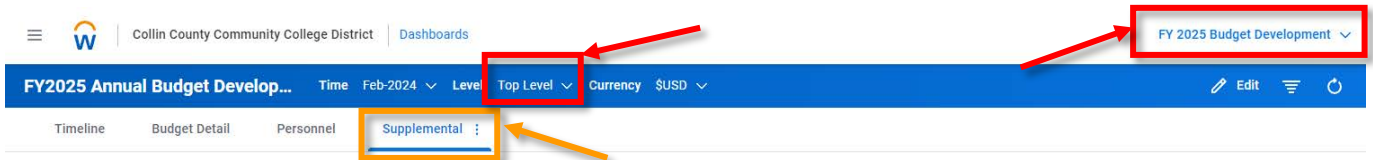
**Inform your supervisor when you have finished reviewing your personnel for the new fiscal year for their review.**

**Cost Center Managers, please inform Christine Lin and Lenora Gray when your final personnel list is ready for our review.**

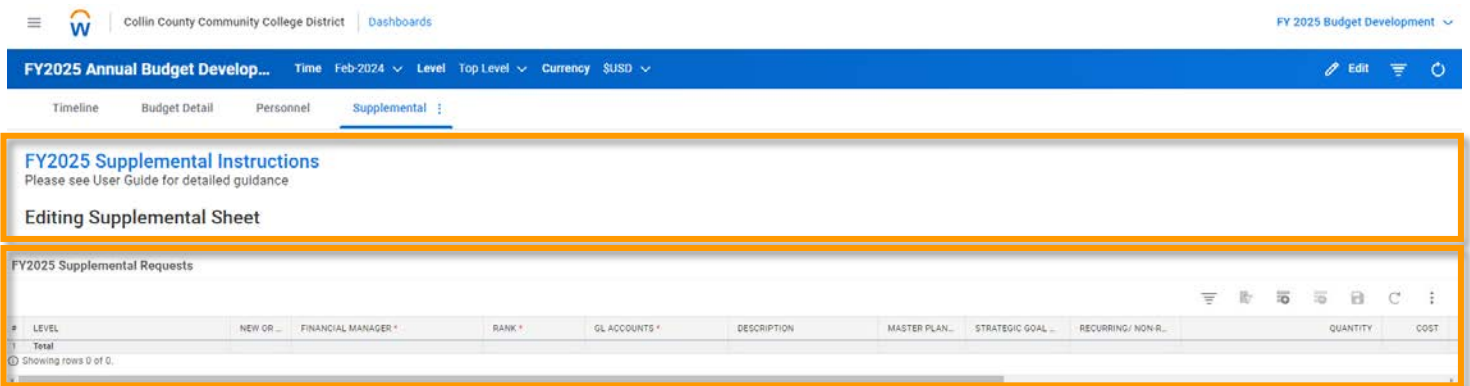
### c. Supplemental Sheet

Click on the Supplemental Tab

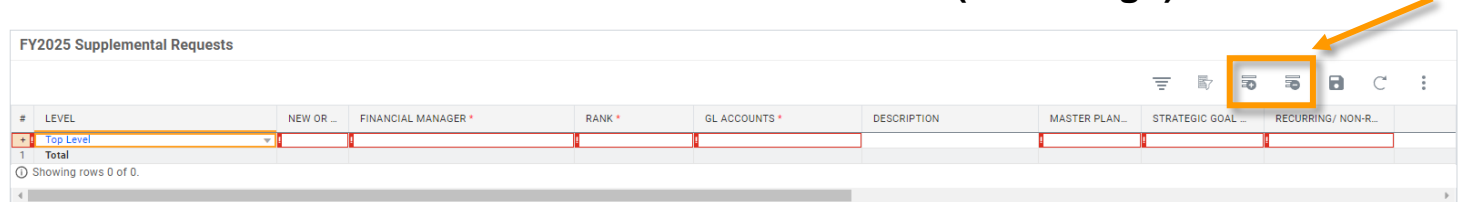
Ensure you are in the right Version and Level (For those with access to multiple levels, you will need to toggle between them when reviewing/filling out your Budget Sheets. Click outside of the selection box to apply your selection.)



The top portion will have instructions, the bottom portion will be where you enter supplemental requests.



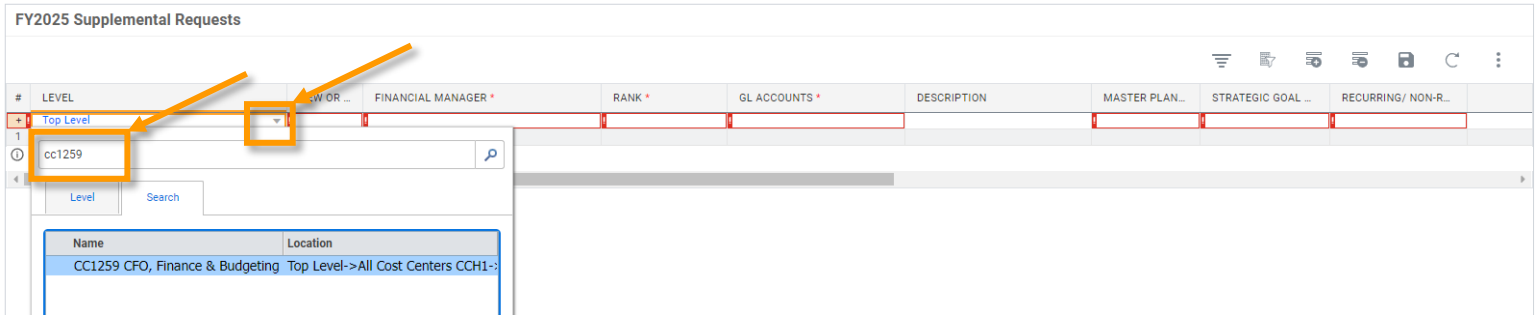
Add rows to fill out supplemental sheet using the Add Rows button (plus sign). You can also delete rows with the Delete Row button (minus sign)



Please fill out all fields/columns.

You can either use the drop-down menu for each field to fill out your information or begin typing your information and hit Enter.

You can also use the search bar at the top of each field's drop-down menu to search your information and then click on the one you want to select.



**Example:**



**Please fill out all open fields/columns:**

**Level:** The Cost Center you are budgeting for or choose your home CC if requesting a new Cost Center.

**New or Existing CC?:** This will let the Budget Office know if you are requesting a new Cost Center.

**Financial Manager:** This is the requestor/CC Manager and lets the Budget Office know who to contact.

**Rank:** All requests are to be ranked in priority (1, 2, 3, 4, etc.) **by Cost Center**. This field is how to communicate with Leadership that an item is truly important to you.

**GL Accounts:** Select the ledger account via drop-down; you can use the search bar if you know the ledger account name or number or just type directly into the cell.

**Description:** This column is a free text field. Please be detailed in your description to inform Leadership what this request is for and why it is needed.

**Master Plan Priority #:** The Master Plan Priorities can be found at this link (<https://www.collin.edu/masterplan/20232030masterstrategicplan.pdf>). Please work with your supervisor to determine which priority best fits with your request. You can choose "N/A - See Strategic Goal" if that fits better, but you are required to choose a Master Plan Priority and/or Strategic Goal.

**Strategic Goal #:** The Strategic Goals can be found at the same link as the one above in Master Plan Priority #. Please work with your supervisor to determine which goal best fits with your request. You can choose "N/A - See Master Plan Priority" if that fits better, but you are required to choose a Master Plan and/or Strategic Goal.

**Recurring/Non-Recurring:** If you are requesting these additional funds for every year going forward, choose "Recurring". If this is a one-time request for additional funds, choose "Non-Recurring".

**Quantity:** Enter the number of units needed and hit Enter.

**Cost:** Enter the cost per unit and hit Enter. All requests should be over \$2,500 per line item.

**Business Office Editable/Read-Only Columns:**

**Total Expense:** When you click the Save button, this will auto-calculate (Quantity \* Cost).

**Prelim Approval:** After Leadership meets, the Budget Office will update this column for your reference to see if a request was preliminarily approved or rejected.

**Notes – Preliminary Approval:** Any notes provided by Leadership will be entered here by the Budget Office for your reference.

**Cabinet Approval:** After Cabinet meets, the Budget Office will update this column for your reference to see if a request was given final approval or rejection.

**Notes – Cabinet Approval:** Any notes provided by Cabinet will be entered here by the Budget Office for your reference.

**\*\*\*Click Save button – if you do not click Save, your changes will be lost!!**

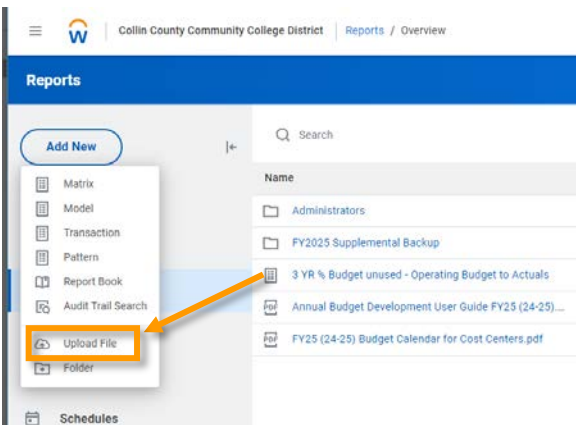
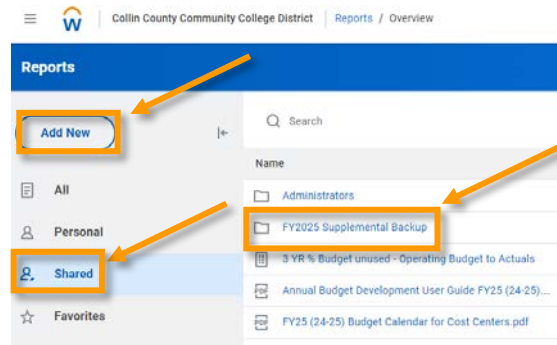
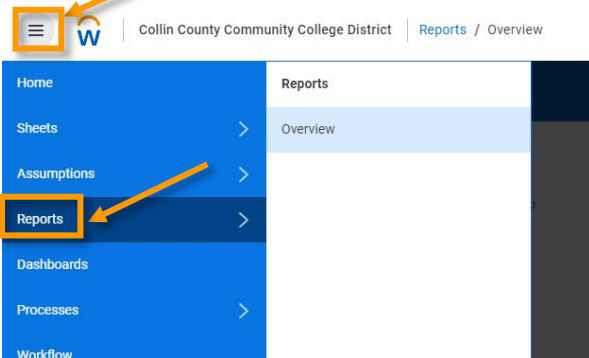
#	LEVEL	NEW OR	FINANCIAL MANAGER *	RANK *	GL ACCOUNTS *	DESCRIPTION	MASTER PLAN	STRATEGIC GOAL	RECURRING/ NON-R.	QUANT.	COST	TOTAL EXPEN.	PRELIM APPRO
1	Total				60110:Staff Salaries & Wage	Accounts Receivable PT Coord	N/A - See Strat	4 - Attract & Retain	Recurring	1	28,347.00	0	

Once data is entered you may filter using the filter or display options buttons for easier review.

FY2025 Supplemental Requests

#	LEVEL	NEW OR	FINANCIAL MANAGER *	RANK *	DL ACCOUNTS *	DESCRIPTION	MASTER PLAN...	STRATEGIC GOAL...	RECURRING/ NON-R...	QUANT...	COST	TOTAL EXPEN...	PRELIM APPRO
1	CC1259 CFO, Finance & Budgeting	Existing	Keltha Carlton	1	60110 Staff Salaries & Wage...	Accounts Receivable PT Coord...	N/A - See Strat...	4 - Attract & Retain ...	Recurring	1	28,347.00	0	
Showing rows 0 of 0.													

Any additional backup may be loaded into the Shared Reports folder “FY2025 Supplemental Backup”. Click on Menu, Reports, Shared, FY2025 Supplemental Backup, Add New, Upload File, Browse, choose your file, add a name that includes the Cost Center Manager name, a short description, “Upload and Share”, click the User Group Menu bar, click Administrator Group, Users Menu bar, type/click your supervisor(s) names that need access, OK, OK.



Upload File

File  No file chosen

Name

Description

Save in

# Employee Job Aides

Share Report

Share Who Has Access Advanced

Select User Groups, Users or Levels

Select one or more recipients

Report URL

https://login.adaptiveinsights.com/app?r=ODVZLENPTEkTjjsUw%3D%3D&service-report

OK Cancel

Select by Category

User Groups Users Levels

User Groups Selected

Search

Administrator Group

Planning Analyst Group

OK Cancel

Select by Category

User Groups Users Levels

Users Selected

Search

Melissa Itby

Name	Path
Melissa Itby (mitby@collin.edu)	Melissa Itby

OK Cancel

Share Report

Share Who Has Access Advanced

Select User Groups, Users or Levels

Administrator Group Bill King (bking@collin.edu) Melissa Itby (mitby@collin.edu)

OK Cancel

**Inform your supervisor when you have entered your supplemental requests for the new fiscal year for their review.**

**Cost Center Managers, please inform Christine Lin and Lenora Gray when your final supplemental list is ready for our review. Please include a total amount.**