



Workday Finance, configured by a Chartered Accountant.

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■ WORKDAY FINANCE · STEP BY STEP

Create Plan Template

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■ Purpose & Overview

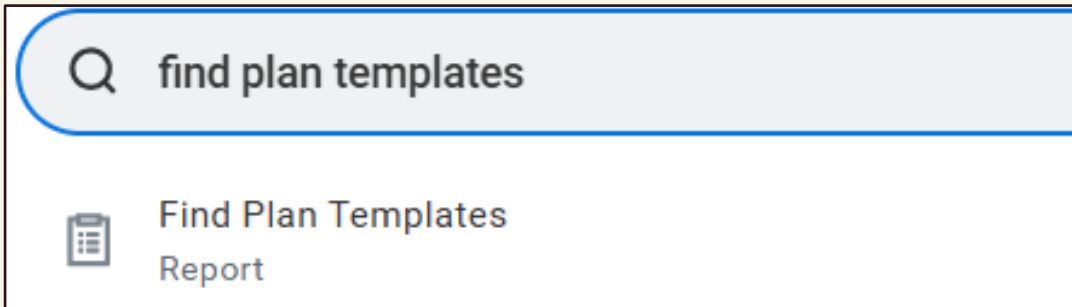
- Plan Templates define company, currency, and time-period structure for financial plans.
- Workday generates plans and periods based on the selected template.

■ Prerequisites

- Financial Planning security access
- Open planning period
- Company and currency setup completed

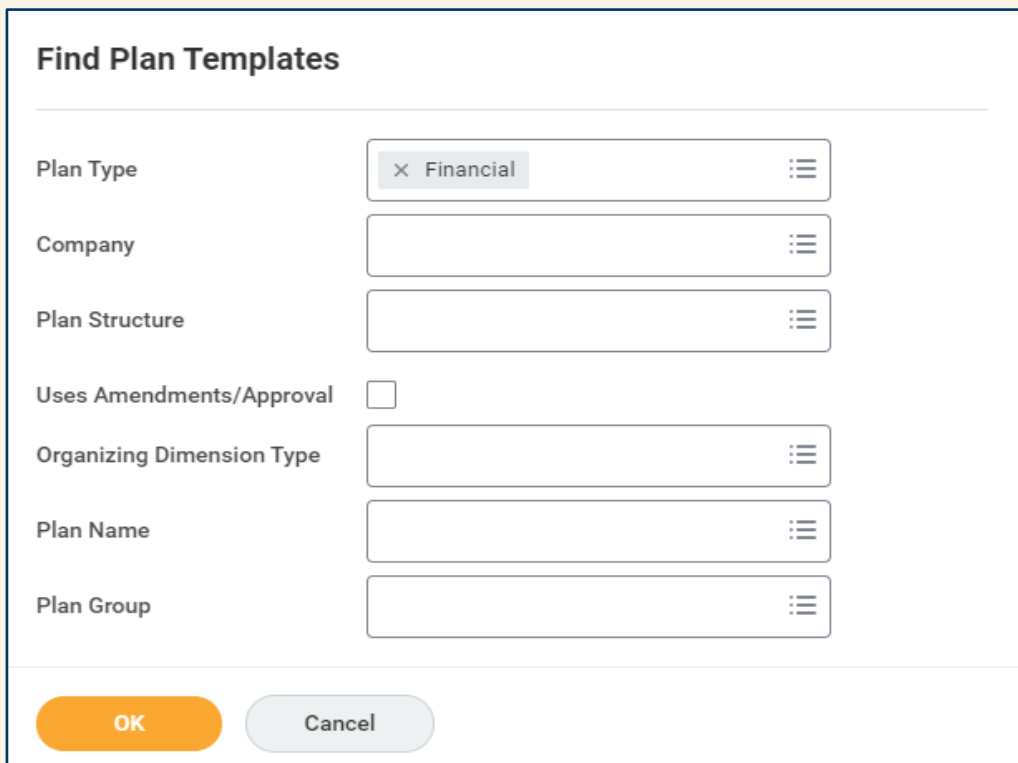
■ Access Find Plan Template

- Search 'Find Plan Templates' in Workday.



A screenshot of the Workday search interface. The search bar contains the text 'find plan templates'. Below the search bar, a result is displayed with a calendar icon and the text 'Find Plan Templates Report'.

- Select Plan Type = Financial.



A screenshot of the 'Find Plan Templates' dialog box. The dialog has a title bar 'Find Plan Templates'. Below the title bar, there are several fields and a checkbox:

- Plan Type:** A dropdown menu with 'Financial' selected.
- Company:** A text input field.
- Plan Structure:** A text input field.
- Uses Amendments/Approval:** A checkbox.
- Organizing Dimension Type:** A text input field.
- Plan Name:** A text input field.
- Plan Group:** A text input field.

At the bottom of the dialog, there are two buttons: 'OK' (orange) and 'Cancel' (grey).

■ Access Find Plan Template

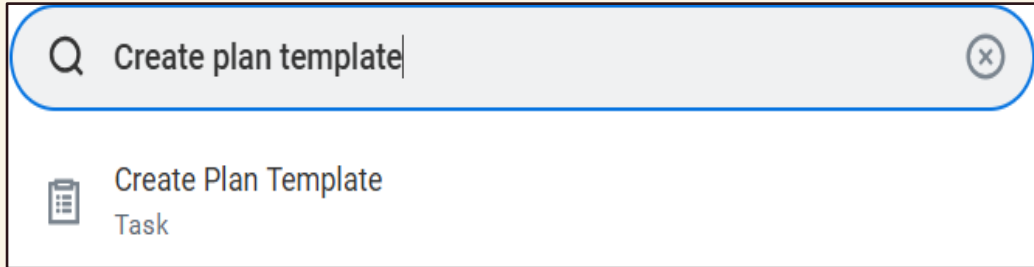
- Existing financial plans can be used as a reference when creating new Plan Templates. Click a Plan Name to view the prior year’s Plan Template setup.

Plan Templates 61 items

Plan Template	Company	Plan Structure	Plan Name	Plan Type	Organizing Dimension Type	Inactive
Q	Global Modern Services, Inc. (USA)	2025 Budget Structure	2025 Budget Plan	Financial		
Q	Global Modern Services, Inc. (USA) Global Modern Services, Ltd (Canada) Global Modern Services, PLC (U.K.) Global Modern Services (Pty.) Ltd (South Africa) Global Modern Services AB (Sweden) ⊕ More (34)	AI GMS - Financial Budget	2022 Financial Budget	Financial		

■ Create Plan Template – With Budget Checks

- Search 'Create Plan Template'.



- Enter Plan Structure, Company, Plan Name.
- Enable Budget Checks as required.
- Define From/To Year and Period.

Create Plan Template

Plan Structure *

X Budget

...

⋮

Company *

X Global Modern Services, Inc. (USA)

...

⋮

Plan Name *

Testing

Default Entry Type *

X Operational

...

⋮

Default Reporting Currency *

X USD

...

⋮

Enable Multicurrency

☐

Enable for Allocations

☐

From

Year *

X 2023

...

⋮

Period *

X Jan

⋮

To

Year *

X 2026

...

⋮

Period *

X Dec

⋮

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7 SWIPE →

■ Create Plan Template – Without Budget Checks

- Repeat Create Plan Template steps.
- Do not enable Budget Checks.
- Confirm reporting currency and periods.

Create Plan Template

Plan Structure *

×

Fiscal Budget

...

:

≡

Company *

×

Global Modern Services, Inc. (USA)

...

:

≡

Plan Name *

Testing Without Budget Checks

Default Entry Type *

×

Operational

...

:

≡

Default Reporting Currency *

×

USD

...

:

≡

Enable Multicurrency

☐

Enable for Allocations

☐

From

Year *

×

2025

...

:

≡

Period *

×

Jan

:

≡

To

Year *

×

2025

...

:

≡

Period *

×

Dec

:

≡

■ Create Parent Plan Template for Reporting

- Use Find Plan Template.

 Find Plan Templates Report

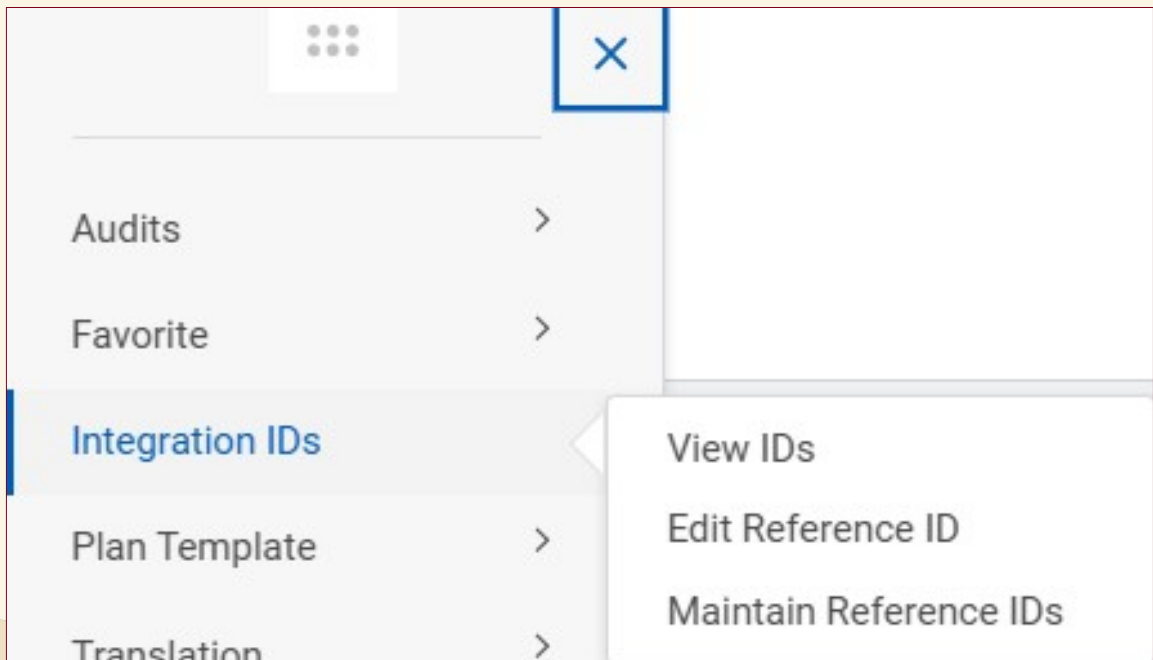
Find Plan Templates 9/16/2021						
Filter Criteria - Plan Activity - Award - Award Proposal - Financial - Headcount - Position - More (3)						
Plan Templates 184 items						
Plan Template	Company	Plan Structure	Plan Name	Plan Type	Organizing Dimension Type	Inactive
Q	Global Modern Services, Inc. (USA)	2025 Budget Structure	2025 Budget Plan	Financial		No

■ View Plan ID

- Hover over the plan name in the Plan Name column and click on the related actions button:

Plan Templates 184 items				
Plan Template	Company	Plan Structure	Plan Name	Plan Type
	Global Modern Services, Inc. (USA)	2025 Budget Structure	2025 Budget Plan 	Financial

- Hover over Integration IDs and click on View IDs:



■ View Plan ID

- The resulting page provides the plan's Reference ID Type and ID:

Integration IDs

2025 Budget Plan

Workday ID fde3ffedcc2b10055d2110bff8770001

Reference IDs 1 item

Type	ID
Custom_Budget_ID	2025 BUDGET PLAN

■ Common Errors & Resolutions

Error	Cause	Resolution
Unable to create Plan Template	Required fields not populated	Enter Plan Name, Plan Type, Company, Currency, and Period range
Incorrect periods generated	From / To Year or Period selected incorrectly	Re-select correct fiscal year and planning period range
Budget check not applied	“Enable Budget Checks” not selected	Select the Budget Check option while creating the template
Plan Template not available for reporting	Parent Plan Template not created	Create a Parent Plan Template and use it for reporting



Thank You

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