

Instructions on how to prepare & upload EIB template for budget amendments

(UW-Madison – S/C/D)

Populate EIB Template: ([Link to EIB template](#))

In the **Import Budget Amendment** tab: The fields highlighted in grey can be left as is.

Header Key (column B): The header key corresponds to the number of the budget amendment being created. For example, enter 1 for the first budget amendment, 2 for the second budget amendment, and so on.

ID (column C): Leave blank as budget amendment ID will be auto-generated once successfully uploaded.

Submit (column D): Select 'N' which will upload the budget amendment to Workday in 'Draft' status and will allow user to add attachments before submitting.

Amendment Date (column I): Enter date you are uploading this template

Description (column J): Enter brief description as to the purpose of budget amendment

Budget Amendment Type (column K): Enter 'Adjusted' (you can also use 'Adjusted_One_Time' if for internal tracking purposes you want to delineate between budget amendments that are ongoing in nature vs. one-time)

Balanced Amendment (column L): Select 'Y'

In the **Amendment Entry Data** tab: The fields highlighted in grey can be left as is.

Header Key (column B): The header key corresponds to the number of the budget amendment being created. For example, enter 1 for the first budget amendment, 2 for the second budget amendment, and so on.

Line Key (column c): References line items on the EIB

Fill out worktag and ledger account information as needed (columns E to M) – Cost Center, Fund, and Ledger account is required

Note: If you are moving salary budget, ensure to include respective fringe budget also. Also, rows that share the same worktags (e.g., Cost Center, Fund, Ledger Account, Spend Category, Program, etc.) will need to be summarized (i.e. you cannot have multiple rows with the same worktags)

Budget Debit Amount and **Budget Credit Amount** – must be entered for a balanced budget amendment.

Memo (column Q): Enter additional information or brief description as to the purpose of budget amendment

Save the template in XLSX format.

Warning: Do NOT change any formatting in the EIB template. Its formatting maintains the correct structure, data mapping, and validation necessary for accurate and efficient data imports.

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Upload EIB Template:

Security roles that can upload this EIB template for budget amendments:

- Budget Approver (Division)
- Budget Approver (Campus)

1. From Workday Home Page, Search for **Launch/Schedule Integration** and click on this task
2. On the pop-up window, enter details as shown in the screenshot:

Launch / Schedule Integration

Integration * FIN EIB: Import_Budget_Amendment_Financial

Organization * UWMSN | CCHL5 | SMPH | School of Medicine and Public Health

Run Frequency * Run Now

Type 'budget' and hit enter and this will auto-populate

This can be your S/C/D or a cost center within your S/C/D

Cancel OK

3. On the next screen, select “Create Integration Attachment” from the drop-down menu for Integration Attachment field:

Schedule an Integration

Request Name * FIN EIB: Import_Budget_Amendment_Financial

Integration System FIN EIB: Import_Budget_Amendment_Financial

Organization UWMSN | CCHL5 | SMPH | School of Medicine and Public Health

Run Frequency Run Now

Integration Criteria 2 items

Provider	Field	Value Type	Value
(Attachment) Import Budget Amendment (WS Background Process)			
Import Budget Amendment	Integration Attachment	Specify Value	Search
	Errors and Warnings Spreadsheet	Specify Value	Last 1 Day
	Validate Only Load	Specify Value	All
			Last 7 Days
			Last 30 Days
			Create Integration Attachment

Please note this does *not* attach the file to the budget amendment, this is just to upload the information in the template you are attaching here.

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4. Select or drop the prepared template you saved earlier and click OK:

Create Integration Attachment

Integration Attachment (empty)

Comment

Attachment *

Drop file here
or

5. Checkmark “Validate Only Load” and click OK, which will start the uploading process.
*this step is recommended, so if there are any technical errors like cost center does not exist or if a required field is missing, etc. it will give you an error before actually uploading the amendment (please note this step does *not* check for unallowable worktags – this is a manual process for which you can use ‘Cost Center Worktags (UW)’ report)

Schedule an Integration

Request Name *

Integration System

Organization

Run Frequency

Integration Criteria 2 items

Provider	Field	Value Type	Value
(Attachment) Import Budget Amendment (WS Background Process)			
	☒ Integration Attachment	Specify Value	Import_Budget_Amendment_Templa × te.xlsx (08/06/2025, 4:40:22.000 PM)
Import Budget Amendment			
	☒ Errors and Warnings Spreadsheet	Specify Value	☐
	☒ Validate Only Load	Specify Value	☒

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6. Click Refresh to update the Status (may take a few seconds depending on the size of the file):

View Background Process FIN EIB: Import_Budget_Amendment_Financial ...

Process	FIN EIB: Import_Budget_Amendment_Financial
Request Name	FIN EIB: Import_Budget_Amendment_Financial
Status	Processing
Current Processing Time (hh:mm:ss)	00:00:00
Average Processing Time (hh:mm:ss)	00:00:00

Refresh

[Integration Details](#) [Process Info](#) [Process History](#) [Output Files \(0\)](#) [Messages \(0\)](#) [Child Processes \(1\)](#)

Enterprise Interface Event FIN EIB: Import_Budget_Amendment_Financial - 08/06/2025, 4:40:39.138 PM (Processing)

Integration Process

Parent Event Integration: FIN EIB: Import_Budget_Amendment_Financial - 08/06/2025, 4:40:39.138 PM

Integration Event FIN EIB: Import_Budget_Amendment_Financial - 08/06/2025, 4:40:39.138 PM (Processing)

7. If there are no errors, Status will change to 'Completed' and in the Response Message will show it was loaded successfully in validation only mode (If there are any errors it will be displayed under "Messages" tab)

View Background Process FIN EIB: Import_Budget_Amendment_Financial ...

Process	FIN EIB: Import_Budget_Amendment_Financial
Request Name	FIN EIB: Import_Budget_Amendment_Financial
Status	Completed
Current Processing Time (hh:mm:ss)	00:00:08

[Integration Details](#) [Process Info](#) [Process History](#) [Output Files \(0\)](#) [Messages \(3\)](#) [Child Processes \(9\)](#)

Enterprise Interface Event FIN EIB: Import_Budget_Amendment_Financial - 08/06/2025, 4:43:39.467 PM (Completed)

Integration Process

Parent Event Integration: FIN EIB: Import_Budget_Amendment_Financial - 08/06/2025, 4:43:39.467 PM

Integration Event FIN EIB: Import_Budget_Amendment_Financial - 08/06/2025, 4:43:39.467 PM (Completed)

Integration System FIN EIB: Import_Budget_Amendment_Financial

Initiated By Karla Thompson

Initiated at 08/06/2025 06:43:39.467 PM

Ran As WD00000454344 / Karla Thompson

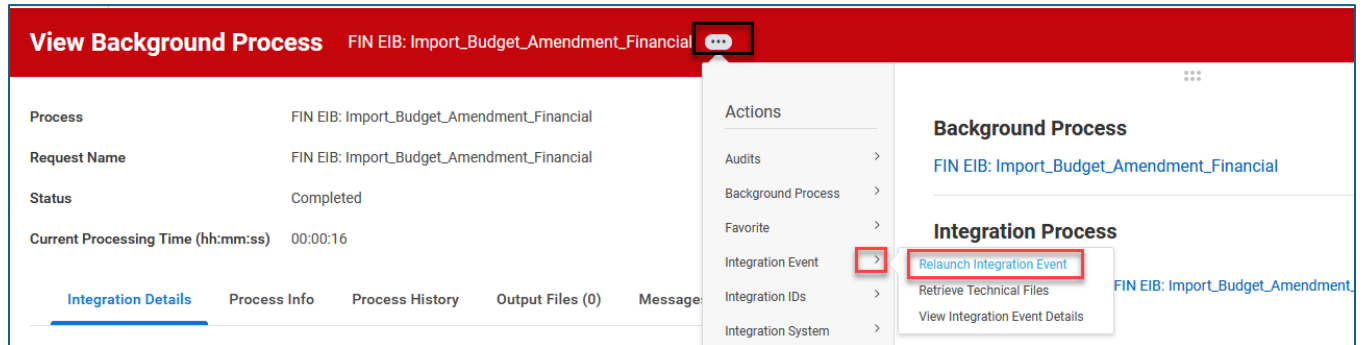
Response Message SUCCESS (Validation Only Mode): All records loaded successfully!!

Resent from FIN EIB: Import_Budget_Amendment_Financial - 08/06/2025, 4:40:39.138 PM (Completed With Errors)

Consolidated Report and Logs
[Retrieve Log Files](#)

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8. The amendment can now be uploaded without selecting ‘Validate Only Load’. For that, click on Related Actions -> Integration Event -> Relaunch Integration Event:



9. Uncheck the “Validate Only Load” and click OK (if you received an error in step 7 and if you made any changes to the template, make sure to reattach the updated template in this step:

The screenshot shows the 'Re-Launch Integration' form. The 'Integration Criteria' table has the following data:

Provider	Field	Value Type	Value
(Attachment) Import Budget Amendment (WS Background Process)	☒ Integration Attachment	Specify Value	Import_Budget_Amendment_T emplate.xlsx (08/06/2025, 4:43:36.000 PM)
Import Budget Amendment	☒ Errors and Warnings Spreadsheet	Specify Value	☐
	☒ Validate Only Load	Specify Value	☐

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10. To update the Status click Refresh on the next screen. Once completed, click on Data Load link to see the budget amendment ID (BAMxxxxxxx)

View Background Process FIN EIB: Import_Budget_Amendment_Financial

ProcessFIN EIB: Import_Budget_Amendment_Financial

Request NameFIN EIB: Import_Budget_Amendment_Financial

StatusCompleted

Current Processing Time (hh:mm:ss)00:00:16

Integration Details

Process Info

Process History

Output Files (0)

Messages (3)

Child Processes (9)

Enterprise Interface EventFIN EIB: Import_Budget_Amendment_Financial - 08/06/2025, 4:45:06.440 PM (Completed)

Integration Process

Parent EventIntegration: FIN EIB: Import_Budget_Amendment_Financial - 08/06/2025, 4:45:06.440 PM

Integration EventFIN EIB: Import_Budget_Amendment_Financial - 08/06/2025, 4:45:06.440 PM (Completed)

Consolidated Report and Logs

Retrieve Log Files

Integration SystemFIN EIB: Import_Budget_Amendment_Financial

Initiated ByKarla Thompson

Initiated at08/06/2025 06:45:06.440 PM

Ran AsWD00000454344 / Karla Thompson

Response MessageSUCCESS : All records loaded successfully!!

Resent fromFIN EIB: Import_Budget_Amendment_Financial - 08/06/2025, 4:43:39.467 PM (Completed)

Child Processes 3 items

Created Date and Time	Started Date and Time	Process Type	Process	Schedule	Request	Status	Parent Status	Total Processing Time	Submitted by
08/06/2025 06:45 PM	08/06/2025 06:45 PM				Integration Event Trigger	Completed		00:00:00	Karla Thompson
08/06/2025 06:45 PM	08/06/2025 06:45 PM	Integration	Transformation		Transformation	Completed	Successfully Completed	00:00:05	Karla Thompson
08/06/2025 06:45 PM	08/06/2025 06:45 PM	Integration	Data Load		Data Load	Completed	Successfully Completed	00:00:10	Karla Thompson

11. Click on the budget amendment ID (Note that the amendment is uploaded in a Draft status):

View Background Process Data Load

ProcessData Load

Request NameData Load

Parent ProcessFIN EIB: Import_Budget_Amendment_Financial - 08/06/2025, 4:45:06.440 PM (Completed)

StatusCompleted

Current Processing Time (hh:mm:ss)00:00:10

Integration Details

Process Info

Process History

Output Files (0)

Messages (0)

Child Processes (4)

Integration Process

Parent EventIntegration: Data Load - 08/06/2025, 4:45:12.111 PM

Integration EventData Load - 08/06/2025, 4:45:12.111 PM (Completed)

Consolidated Report and Logs

Retrieve Log Files

Event TypeIntegration Event

Integration SystemData Load

Initiated ByKarla Thompson

Initiated at08/06/2025 06:45:12.111 PM

Ran AsWD00000454344 / Karla Thompson

Response MessageIntegration Completed.

Child Processes 3 items

Created Date and Time	Started Date and Time	Process Type	Process	Request	Status	Parent Status	Total Processing Time	Submitted by	Errors & Warnings	Target Instance
08/06/2025 06:45 PM	08/06/2025 06:45 PM	ESB	Data Load	Integration ESB Invocation	Completed		00:00:09	Karla Thompson		
08/06/2025 06:45 PM	08/06/2025 06:45 PM			Integration Event Trigger	Completed		00:00:00	Karla Thompson		
08/06/2025 06:45 PM	08/06/2025 06:45 PM	Web Service	Import Budget Amendment (WS Background Process)	Import Budget Amendment	Completed		00:00:02	Karla Thompson		Budget Amendment: 2025 - UW All Funds Operating Budget on 08/06/2025 : BAM-0000000413

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12. Click on Related Actions -> Budget Amendment -> Edit, then go to Attachments tab to add attachments and submit:

