

# Standing Operating Procedure (SOP): RPT 436 Pulling Divisional Budgets

## Pulling Budgets by Department with Sub-Organization Detail and Pivot Table Analysis

### Purpose

To standardize the extraction and analysis of department-level budgets at Bowie State University using Workday (RPT436) and Excel pivot tables with USource (sub-org) detail.

### Step-by-Step Instructions

#### 1. Identify Divisions and Departments

Use the “BSU USource Hierarchy (by Division)” document to identify the division you are pulling.

#### 2. Access Workday

Log in using your BSU credentials.

#### 3. Navigate to RPT436

In the Workday search bar, type RPT436.  
Select Budget vs Actual by Suborganization.

#### 4. Input Report Parameters

Field	Value
Company	UM23 Bowie State
Org	e.g., USH23003 Athletics (or other USource)
Plan Structure	Child Plan
Plan Name	FY26 Budget
Period	FY26
Worktags – Funds	4010, 4011, 4015, 4020, 4030, 4031, 4032, 4033, 4034, 4035, 4036

#### 5. Run and Export

Click Run Report.  
Click the Excel Export icon after the report loads.

#### 6. Insert a Pivot Table

Open the exported Excel file.  
Select all data (Ctrl + A).  
Go to Insert → Pivot Table → New Worksheet.

# Standing Operating Procedure (SOP): RPT 436 Pulling Divisional Budgets

## 7. Build the Pivot Table

Fields To Select	Action
USource	Drag to “Rows”
Spend Category	Drag to “Columns”
Ledger Account Summaries	Drag to “Filters”
Original Budget	Drag to “Values (Sum)”

## 8. Clean the Table

Review the Pivot Table columns (Spend Categories).

Right-click and remove any sub-columns that aren’t needed for your analysis or reporting.

You may also rename or format categories for clarity.

## 9. Save and Distribute

Save your file using the naming format: FY26\_Budget\_<DivisionOrOrgName>\_Pivot.xlsx

Store in the shared drive or email to stakeholders as needed.