

Overview

This Quick Reference Guide (QRG) is designed to walk users through basic navigation in Adaptive Planning’s Reports.



This QRG assumes that you already have access to Workday Adaptive Planning and can log in. If you don’t have access yet, email AskFinance@virginia.edu to request access. Include the Cost Center(s) that you need to budget for.

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Opening Reports

On the Adaptive **Home** screen:

1. Log in.
2. Select the Workday Icon.



The primary point of navigation is the Workday icon. Selecting this icon will drop down a menu of options.

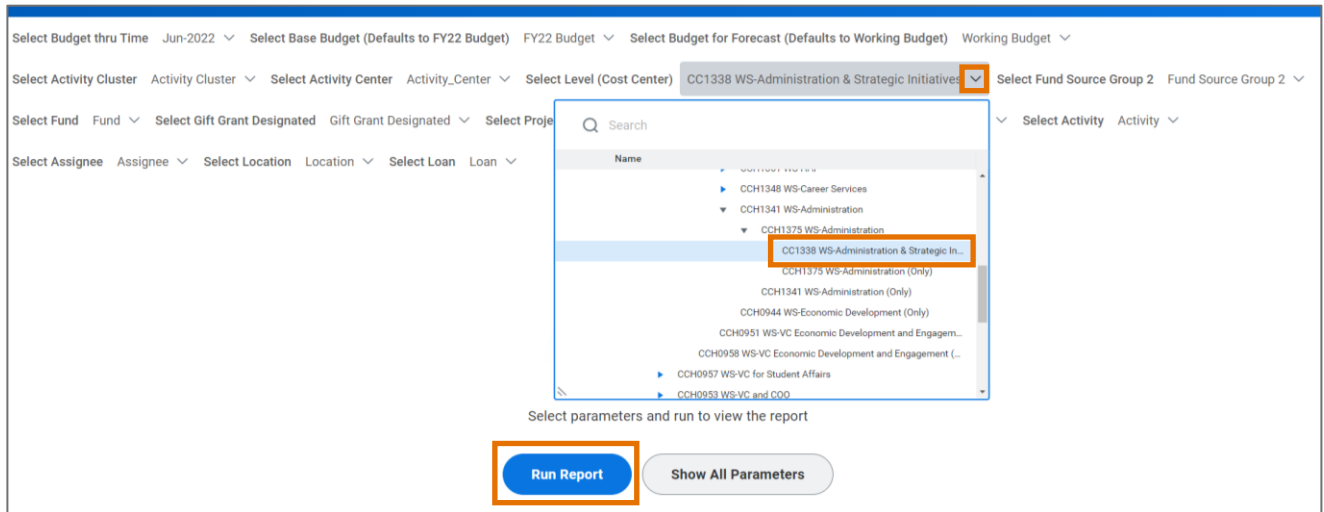
3. Click on **Reports**.
4. Click on **Shared**.
5. Navigate to your desired report, either by clicking through the folders or by using the search bar. Reports are grouped by type and located within labelled folders.
6. Click on desired report.



To open a report in a new tab, right click on the Report name and select “open in a new tab.” This is helpful if you want to have multiple sheets or reports open at the same time.

7. Specify Report Parameters.

The parameter fields vary based on report and are not mandatory. Use these fields to narrow the data and determine what parameters are displayed in your report. Sometimes, you need to click “Show All Parameters” for the rest of the parameters to be visible.



8. Select the Run Report button.

General Navigation

Once report is open:

1. Navigate the Report Task Bar

Report Taskbar



1. **Save As** – You can save a report with specific filters applied, but this is strongly discouraged. As soon as you save a report, it becomes stale – in that it would not include any future report updates. It is much better if you become comfortable running the report and then filtering and drilling down into the information within that report without saving it.
2. **Create Snapshot** – This allows you to save a snapshot within Adaptive and it will go to your personal folder in the Reports section of Adaptive Planning.

3.	Edit – We do not recommend editing reports as a long-term strategy. Instead, if you see a need for something different in reports, email AskFinance to make a request.
4.	Send Notification – This sends a link of the report to another person. You also have the option of copying yourself in the notification.
5.	Refresh – You can use this tool if you are making changes to a Sheet in one tab and want to see the updated impact on the Report in another tab. After you’ve made your change in the Sheet, return to the report and click the Refresh icon.
6.	Download – These icons allow you to view the report in a printable format or export to excel or PDF.
7.	Return to Undrilled Report – This icon only shows up after you’ve drilled into a drillable field on the report. Once you have returned to the undrilled report, it is no longer visible in the toolbar.
8.	Freeze Headers – Allows you to freeze and unfreeze the header while you scroll
9.	Show Information – Selecting this icon will show/hide the Report Information, which includes a description of the report and all parameter selections.
10.	Notes - This icon gives options for entering Report Notes. Notes added here, will carry over to higher-level reports. Therefore, we do not want people entering comments in the report notes. <i>The preferred method for adding a note pertaining to your budget is to enter it in the comments field when you submit your budget.</i>

2. Drill into the report fields

Any elements within the report that are blue text indicate an area where you can drill down to more granular details.

- a. Select a blue element to drill into.
After clicking on the blue element, a list of drill-in items will pop up.
- b. Select desired item from list of options.
- c. Once a selection is made, the report structure will remain the same, but the data will be broken out based on the selection
- d. Click on the “Return to Undrilled Report” icon to return to the original report.

OTPS (Rollup)									
OTPS (Uncategorized)	-	-	-	-	-	-	-	-	-
OTPS-Equipment	-	-	-	-	-	-	-	-	-
OTPS-Lease and Rents	-	-	-	-	-	-	-	-	-
OTPS-Other	-	-	-	-	2,500	2,500	2,500	2,500	2,500
OTPS-Services	-	-	-	-	-	-	-	-	-
OTPS-Supplies	-	-	-	-	-	-	-	-	-
OTPS-Travel	-	-	-	-	-	-	-	-	-
Total OTPS (Rollup)	-	-	-	-	2,500	2,500	2,500	2,500	2,500