UVAFinance wd



Workforce Planning Time Limited Quick Reference Guide

Overview

This Quick Reference Guide (QRG) is designed to walk users through using the Time Limited column in the Workforce Planning sheet in Adaptive Planning.

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Use the Time Limited Column

The Time Limited column can be used in the Workforce Planning Sheet to identify time restricted assignments. Time restricted assignments have a start and end date.

The Time Limited column should be populated with a "Yes" to indicate a time limited assignment; otherwise, the column should be left blank.

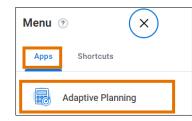
1. Log into Workday.

On the Workday Home screen:

2. Click on Menu.



3. Click on Apps (if not selected), then select Adaptive Planning.





4. Click on Adaptive Planning.

On the **Adaptive Planning** screen:

- 5. Select the **Global Navigation** lcon at the top left of the screen.
- 6. Select **Sheets** from the menu, then **Workforce Planning** from the list of Sheets.

$\equiv \prod_{Virginia}^{Virginia}$	UVA4	New sandbox - University of Virginia
Home		Sheets
Sheets	>	Overview
Reports	>	Input Sheets
Dashboards		Workforce Planning
Announcements	>	Non-Compensation Input
Support	>	Revenue Input
		7 (

On the **Workforce Planning** sheet:

- 7. Find the row that you want to mark as time limited.
- 8. Scroll to the TIME LIMITED column.
- 9. Click in the cell and select Yes. (Click the arrow next to All to expand it, if needed.)

	8/25/2023	8/24/2024	Yes	~
Q Search		'		
Name	D	escription		-
(None)				
▼ All				
Yes				
				-
~				- 11

10. Click **Save** to save your changes.

REF: EMP START	REF: EMP END	TIME LIMITED	REF: ANNUAL WORK PERIOD
8/25/2025			
8/25/2023	8/24/2024	Yes	



You can hide the Time Limited column if do not need it or choose not to use it. Click the Display Options icon on the toolbar, go to the **Hide Columns** tab, and select the **Time Limited** column check box.

Select the Time Limited Filter in Reports

The Time Limited filter is available on:

- The Prompting Parameters (filters) page for all the Compensation reports, except:
 - Fringe Assumption Rates
 - Employees with Contract End Date
 - o Faculty with Primary Appointment End Date
- The Drill Intro list for all reports, however, it is most applicable to Workforce Planning data

Depending on the report, this filter can help you:

- Identify time restricted assignments and see information associated with those restricted assignments
- Compare restricted vs non-restricted assignments

The example below runs the MYFP Parameters and CAGR (Drill Thru) report.

On the Adaptive Planning screen:

- 1. Select the **Global Navigation** licon at the top left of the screen.
- 2. Select Reports from the drop-down menu.

	You must be on the VPN to access the Adaptive Planning app.
NOTE	

On the **Reports** screen:

- 3. Click Shared.
- 4. Select **MYFP** from the list of report categories.

Reports	
Add New +	Q Search
	Name 🕆
E All	D0. Quality Check
A Personal	C 01. Operational
	C 02. MYFP
<u>ළ</u> Shared	C 03. Compensation
☆ Favorites	04. System Resources
Reusable	05. Budget Development Resources
🛱 Schedules	06. BOV
 Schedules 	C 07. Request Management
	90. Development
	91. Archive

5. Select Drill Thru.

6. Select MYFP Parameters and CAGR (Drill Thru).

The Select Prompting Parameters page displays.

7. Select the parameters for running the report (e.g., cost center, and/or gift, grant or designated worktag).

For help navigating reports, see the Navigation in Adaptive Reports QRG.

Select Prompting Parar	neters		
MYFP Parameters and CA	AGR (Drill Thru)		
Activity Group	Activity Group	•	
Activity Cluster	Activity Cluster	•]
Activity Center	Activity_Center	•]
Level (CC)	Top Level	•]
FD Source Group	FDH080 UFM Operating Funds	•]
Budget thru Time	Jun-2024	•	
Base Budget	FY2024-BOV	•	
Budget for Forecast	Working Budget	•]
FD	Fund]
GF GR DN	Gift Grant Designated	▼]
PJ	Project	•	
Run Report Cancel			

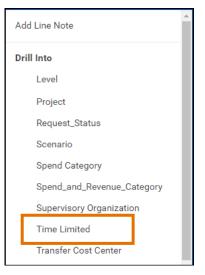
8. Click Run Report.

The report results display.

9. Right-click an item highlighted in blue text (e.g., under Uses > Compensation) to display a subsequent list of filters.

USES					
Compensation					
Comp-Staff (Rollup)	-	-	-	1,948,031	-
Salaries-Classified Staff	-	-		355,790	-
Salaries-University Staff	-	-		1,592,241	-
Comp-Wages (Rollup)	-	-	-	43,826	-
Wages-Other	-	-		7,500	-
Wages-Staff	-	-		36,326	-
Subtotal Compensation	-	-		1,991,857	-

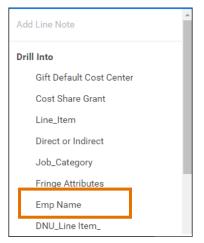
10. Scroll down the list and select **Time Limited**.



The filtered results display.

MYFP Parameters and CAG	R									
			Actuals				Year to dat	e as of Jun	-2024	
	FY2020	FY2021	FY2022	FY2023	CAGR	YTD Actuals	FY2024-B	Actuals vs Base	Working Budget	Actuals vs
 Time Limited (Rollup) 		-	-	1,948,031	-	1,633,762	2,126,905	493,143	2,049,676	415,914
Time Limited (Uncategorized)		-	-	1,948,031	-	1,633,762	2,126,905	493,143	1,893,147	259,385
Yes	-	-	-		-	.	-	-	156,530	156,530

11. Continue to drill down and filter the report as needed. For example, in this report, right-click the row for the Time Limited amount and select **Emp Name** to show the employees with the time limited assignments.



The filtered results display.

			Actuals				Year to dat	te as of Jun	-2024	
	FY2020	FY2021	FY2022	FY2023	CAGR	YTD Actuals	FY2024- BOV	Actuals vs Base	Working Budget	Actuals vs
Emp Name (Rollup)	-	-	-	-	-	-	-		156,530	156,530
	-	-	-	-	-	-	-		86,466	86,466
		-		-	-		-		70,064	70,064

12. Click the **Return to Undrilled Report** icon on the toolbar to return to the original report results.