



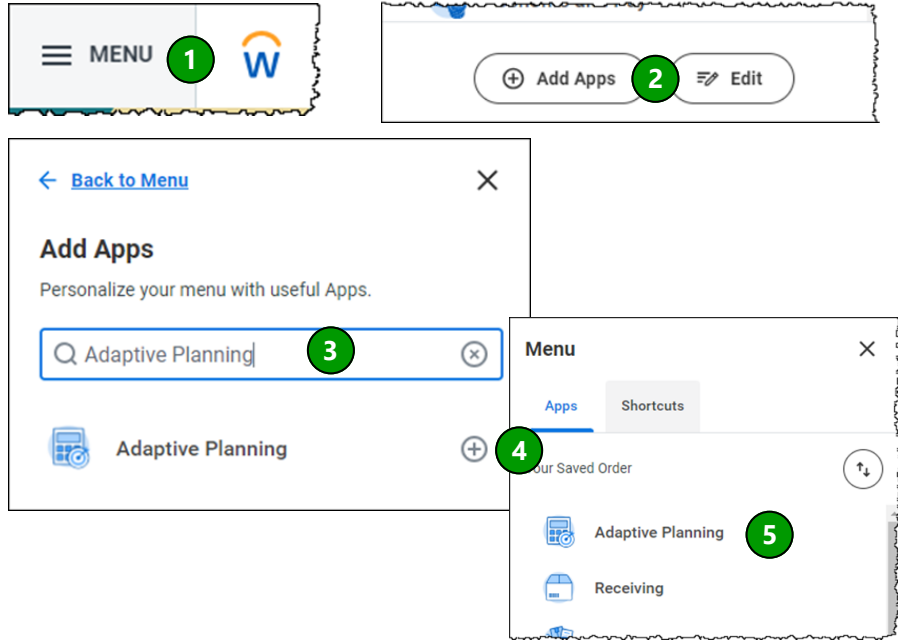
Introduction to Adaptive Planning

Adaptive Planning is the tool used by VUMC for Budgeting, Long-Range Planning, and Forecasting. This guide will help you access the tool and the various functions within it.

Add Adaptive Planning App to Menu:

From the Workday Homepage:

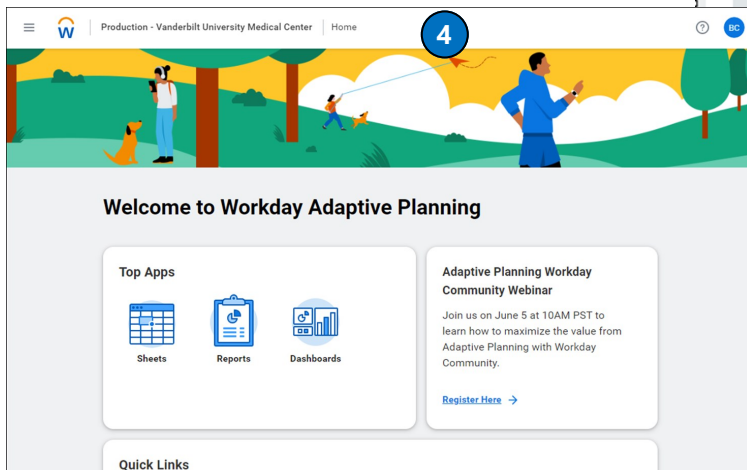
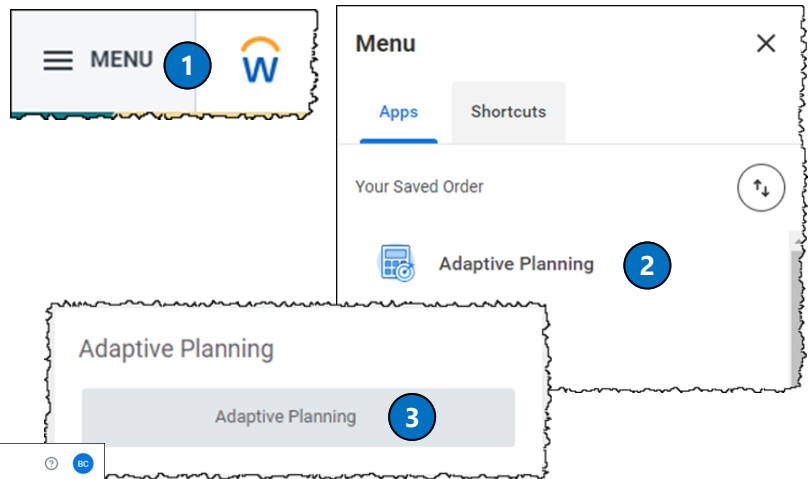
1. Select the **Menu** icon.
 2. Select **+ Add Apps**.
- Note:** If you have already added Adaptive Planning to your menu, you will see the app populated on the menu.
3. Type **Adaptive Planning** to the search bar.
 4. Select the **+** icon next to the **Adaptive Planning** app.
 5. The app will appear on your **menu**.



Accessing Adaptive Planning

From the Workday Homepage:

1. Go to the **Workday Menu**.
2. Select the **Adaptive Planning App**.
3. Select **Adaptive Planning**.
4. A **new tab** will open with the Adaptive Planning tool. You do **NOT** need to return to Workday.

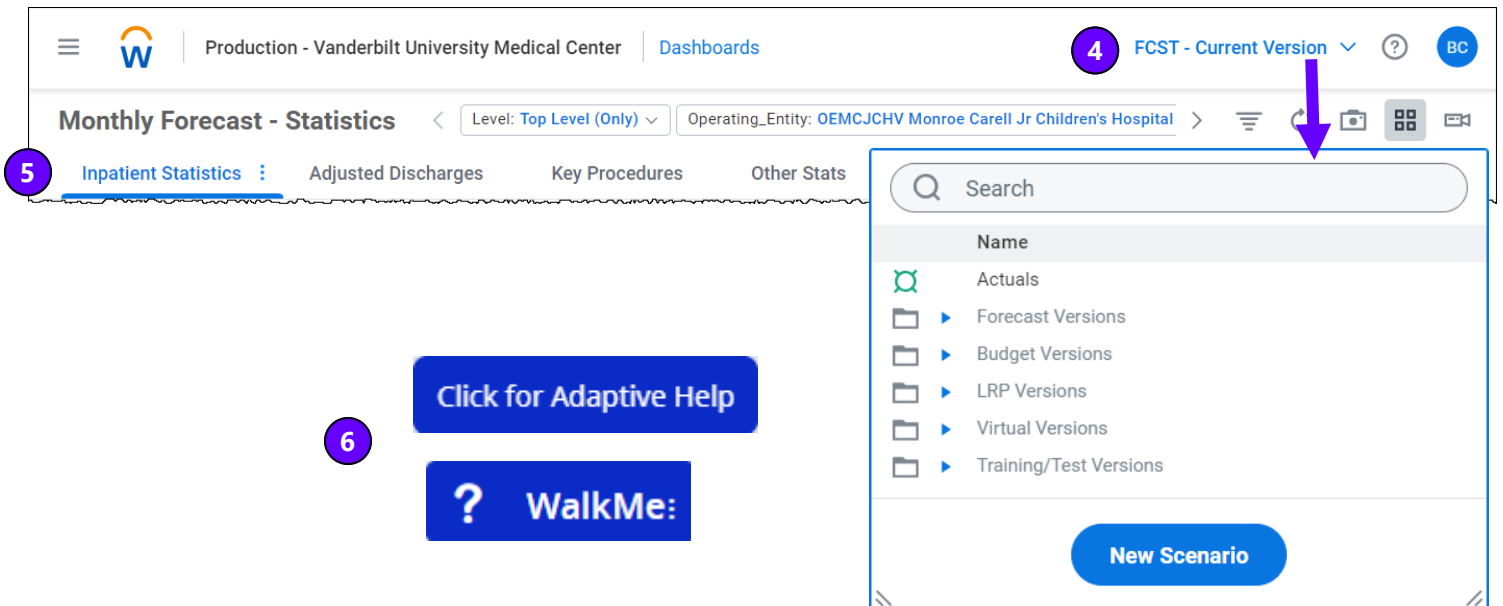
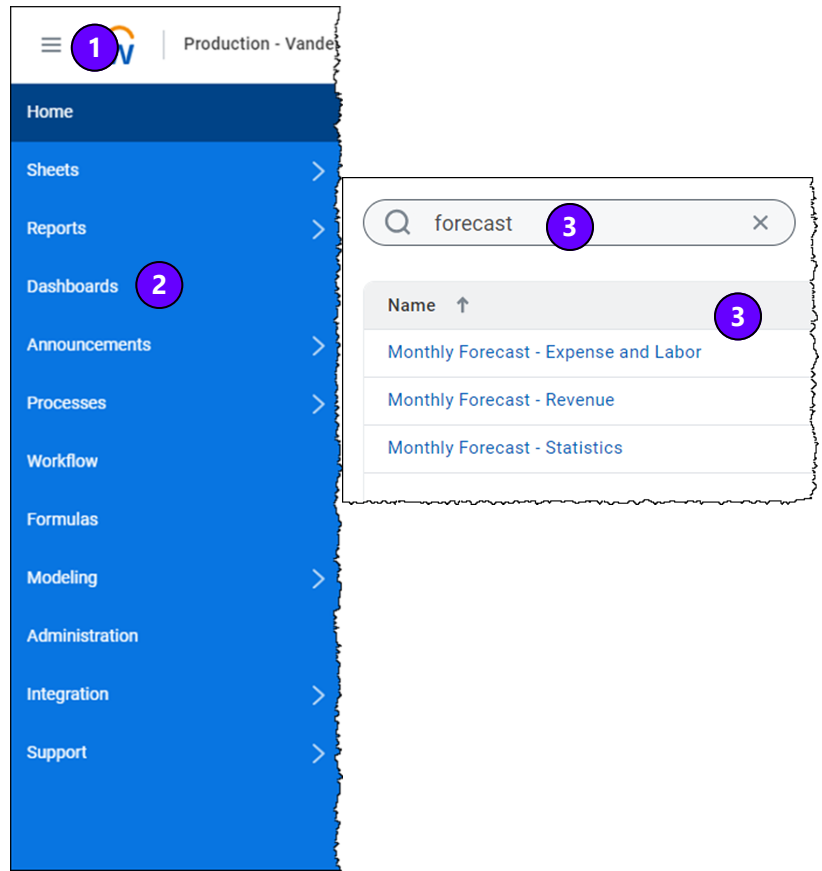




Introduction to Adaptive Planning

Navigating to Dashboards

1. Select the **Menu** icon.
 2. Select **Dashboards**.
- Note:** you can select the Dashboards icon from the Homepage if you see it available under **Top Apps**.
3. You can search for **Budget, Forecast, or LRP** in the search tool to find the appropriate dashboards more easily or scroll to the **appropriate dashboard** and select it from the list.
 4. When you are in the dashboard, ensure that you are in the **correct version**. Please note that if you make changes to the data in another version other than those listed below, the changes will not save and will need to be redone in the correct version.
 - Budget:** Budget Current Version
 - LRP:** LRP Current Version
 - Forecast:** FCST Current Version
 5. There are **different tabs** at the top of the screen which you can use to navigate. On those tabs are various sheets that you can review and update as needed.
 6. Use the WalkMe menu for guidance.

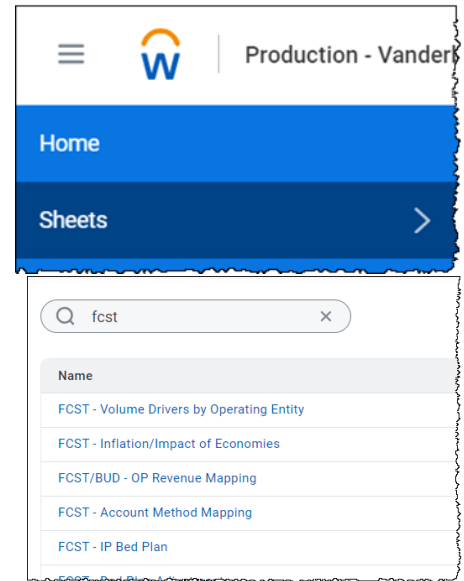




Introduction to Adaptive Planning

Navigating to Sheets:

1. Select the **Menu** icon.
 2. Choose **Sheets**.
- Note:** you can select the Sheets icon from the Homepage if you see it available under **Top Apps**.
3. There is a large number of sheets in the tool. Search for Budget, LRP, or FCST to narrow down the results.
 4. Select the appropriate sheet.
 5. Ensure you are in the correct version. See step 4 on page 2.
 6. Use the appropriate options to filter the sheet.



#	FCST_LRP_ACCOUNT, ACCOUNTS BY TIME	JUN-2024	FY2024	JUL-2024	AUG-2024	SEP-2024	OCT-2024
46	Final Forecast						
47	6495_SC010 Allocations - VMG Billing Tax						
48	FCST - Allocations: Percent of Revenue						
49	Actuals		248,081				
50	Total Operating Revenue		1,077,88...		130,302...	144,231...	140,033...

Navigating within the Sheets

These functions can be used on the Sheets app or on the sheets built within the Dashboards.

If you right click in a cell a list of options will appear. The most helpful of which are listed below:

1. Copy Forward—Allows you to copy the same number for the entire row.
2. Explore Cell—Gives detailed information about the individual cell.
3. Copy Row—Copies the row and adds that row to the sheet.
4. Row Details—Gives Detailed information about the row
5. Display Options—Allows you to change the way the sheet appears, like suppressing zeroes.

- Copy Forward >
- Formula Assistant
- Adjust
- Add Note
- Explore Cell
- Add Row
- Copy Row
- Delete Row
- Row Details
- Display Options



Introduction to Adaptive Planning

Working in Multiple Adaptive Tabs:

Using only the Adaptive Planning system

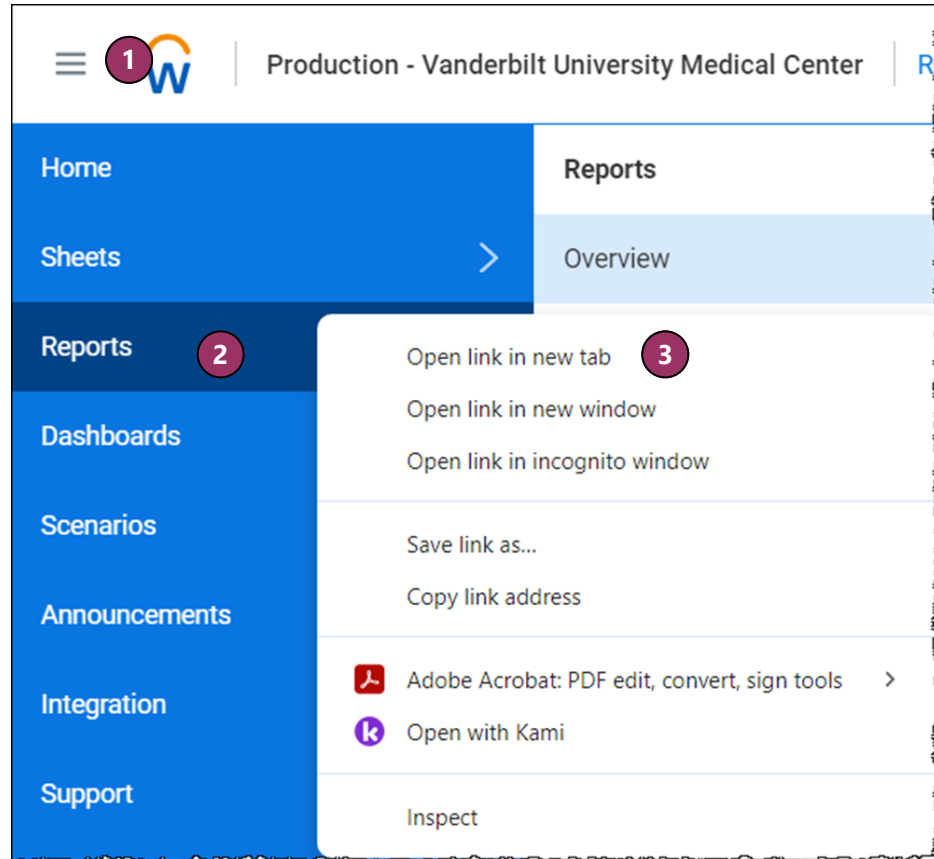
While working on a Dashboard or Sheet, you may need to access data from another report or sheet. Follow the steps below to work in multiple adaptive tabs.

1. From wherever you are in Adaptive, select the **Menu** icon.
2. **Right click** on the **app** you wish to access (Reports, Sheets, or Dashboards).
3. Select **Open link in a new tab**.

Note: You can also hold down the CTRL key while you click on the item and it will open a new tab the same way.

4. A **new tab** will open with the app you selected. You can open the Report, Sheet or Dashboard on this tab and access the previous tab and the new one at the same time.

Note: DO NOT return to Workday to open Adaptive from there. It will refresh your system and you will likely lose work.



QUESTIONS?

Please email BusinessEducation@vumc.org.

09-26-2024