Overview

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

NOTE	This QRG assumes that you already have access to Workday Adaptive Planning and can log in. If you don't have access yet, submit a System Access Request in Workday to request access. Select **FIN Access Requests**, then **Adaptive Planning Access**, and include the Cost Center(s) that you will need to budget for.

Table of Contents

Opening Reports

On the Adaptive **Home** screen:

1. Log in.

2. Click the **Global Navigation** icon.

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

3. Select **Reports.**

4. Select **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 labeled folders.

6. Select the desired report.

HINT	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 (prompts) vary based on the report and are not mandatory. Use these fields to narrow the data and determine the parameters that display in your report.

   Parameter fields can be single or multi-value. If the field will be part of the output data in the report, then you can only select a single value for that field. For example, if Fund data will display in the report output, then you can only select one value from the Fund field. Otherwise, you can select multiple values for a field as needed.

   Single value parameter fields
   - Click the desired field to display the drop-down list.
   - Expand the field or enter search text in the **Search** field.
   - Select the desired value.

   Multi-value parameter fields
   - Click the desired field to display the drop-down list.
   - Clear the **Name** check box (to clear all selections).
   - Expand the field (you might need to expand several levels to get what you want) or enter search text in the **Search** field.
   - Select the desired values.

8. Click the **Run Report** button.

Select Prompting Parameters

Budget Year	FY2023 ▼	to	FY2030 ▼

Activity Cluster	Activity Cluster ▼
Activity Center	Activity_Center ▼
Level (CC)	Top Level ▼
GF GR DN	Gift Grant Designated ▼
FD	FD002 Unrestricted Local Fund ▼
PJ	2 Selected ▼
PG	Program ▼
FD Source Group	FDH080 UFM Operating Funds ▼
FN	Function ▼
AC	Activity ▼
AS	Assignee ▼

Single value field

Multi value field

Run Report   Cancel

General Navigation

Once the 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, please do not enter comments in the report notes. *The preferred method for adding a note pertaining to your budget is to enter it in the comments field when you submit your budget.*

2. Change or select additional parameters (optional).

The parameter fields display at the top of the report under the toolbar. You can change any of the parameters to update the data that displays in the report.

<table>
<tr><td>NOTE</td><td>Just like on the Prompting Parameters page, you can only select a single value at a time for any parameters that display in the output of the report. All other parameter fields allow multiple selections. For more information, see Specify Report Parameters.</td></tr>
</table>
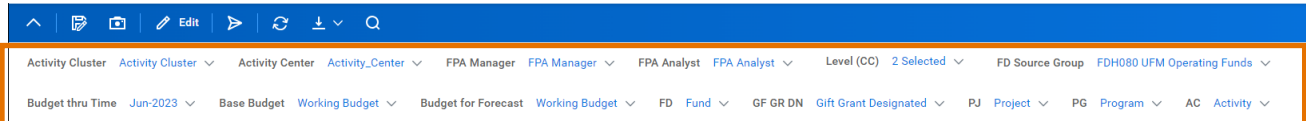
3. Drill into the report fields.
Any elements within the report that are in blue text indicate an area where you can drill down to more granular details.

   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.

Drill-in pop up