Workday Adaptive Insight Login Page and Navigation

Overview: The following document contains instructions on how to sign into Workday Adaptive Insight cloud based financial planning and analysis software. Instructions will also provide an overview on how to navigate and access announcements, planning sheets, reports, and dashboards. For additional information and/or help please reach out to the Office of Financial Planning and Analysis at <u>fp&a@westernu.edu</u>.

Software Background: Workday Adaptive Insights is a recognized Leader in the Gartner 2020 Magic Quadrant for Cloud Financial Planning and Analysis Solutions based on its ability to execute and completeness of vision. The following graphic illustration shows four financial planning and analysis quadrants Workday Adaptive Insights and the Office of Financial Planning and Analysis will be able to provide assistance with.



Sections:



Step 1: Go to https://login.adaptiveinsights.com/.

Step 2: Enter your WesternU email as your username.

Step 3: Enter your Workday password.

Step 4: Click the "Submit" icon.

Workday Adaptive Planning	Customer Service & Support US +01 512 961 7417 UK +44 208 068 9560 AUS +61 280 738 188		
USERNAME PASSWORD PASSWORD Password? Submit	2021R1 is Now Live! See what's new in the most recent release. Learn More	QUICK LINKS Knowledge Center Adaptive Planning Journey Workday Adaptive Planning Blog Workday's COVID-19 Response	

Step 6: Click on the " **w**" icon on the top left-hand corner to display the main navigation menu.



Western University of Health	
Home	aptive Planning
Sheets >	
Reports >	
Dashboards	What's New in
Announcements >	Workday Adaptive Planning
Processes >	
Workflow	Take a look at highlights for the new release.
Support >	

Workday Adaptive Insight Login Page and Navigation Instructions

Step 1: Click on the ">" symbol next to announcements to view any announcements.

Western University of He	ealth Sciences	Dashboards	Western University	Operations Funds	?	RC
Home	Ânn	ouncements				
Sheets	> Sam	nple Announcement				
Assumptions	>					
Reports	>					
Dashboards						
Announcements	>					

Section III: Accessing Sheets

Step 1: Click on the ">" symbol next to sheets to bring up a list of available planning sheets or click "**Sheets**" to bring up the list of sheets on another page called my sheets.

Western University of Health So	ciences Home	Western University	? 🤞
Home	Sheets	*	
Sheets >	Overview		
Assumptions >	Financial Statements		
Reports >	Financial Report	What's New in	
Western University of Health Scie	nces Sheets / Overview	Western University	Operations Funds 🔹 🧿 RC
My Sheets			Level: Western University Consolidated 🔹
			Search Cell Notes

Step 1: Click on the ">" symbol next to reports to bring up a list of available reports or click "**Reports**" to bring up the list of sheets on another page called my sheets.

Western Univers	ity of Health Sci	ences Reports	Western University	FY2022 Plan 💌
Home		Reports		
Sheets		Overview		Last Viewe
Reports	>			
Dashboards				
Announcements				
Processes				
Workflow				
Support				
Western University	of Health Science	s Reports	Western University	Operations Funds 🔹 🕐 RC
Search:	P			New Report -
Folders	Reports in Folder	'Favorites"		
Favorites	Name		Location	Last Viewed
- Personal Reports				
- Shared Reports				

Step 1: Click on "Dashboards" to bring up the dashboard page.

We:	stern University of Health Sciences Dashboards	Western University	FY2022 Plan 💌		
Home			+ New ↓å		
Sheets	>				
Reports	>				
Dashboards					
$\mathbf{\hat{v}}$	Western University of Health Scie	ences Dashboards	Western University		
\$	See Perspectives				
Ō	Shared (2)				
Ĩ					
	Dashboards RC 1 dashboard	Revenues and Expenses b 1 dashboard			

Section VI: Logging Out

