

VUMC BUSINESS EDUCATION



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: MENU Add Apps 2 ₹⁄/ Edit From the Workday Homepage: 1. Select the Menu icon. × Back to Menu 2. Select + Add Apps. Add Apps Note: If you have already added Adaptive Planning Personalize your menu with useful Apps. to your menu, you will see the app populated on 3 Menu × \otimes the menu. Q Adaptive Planning Shortcuts Apps 3. Type Adaptive Planning to the search bar. **Adaptive Planning** \oplus 4 17 Saved Order ^↓ 4. Select the + icon next to the Adaptive Planning app. Adaptive Planning 5 5. The app will appear on your **menu**. Receiving Accessing Adaptive Planning Menu Х ■ MENU w From the Workday Homepage: Apps Shortcuts 1. Go to the Workday Menu. Your Saved Order î↓ 2. Select the Adaptive Planning App. -7 **Adaptive Planning** 2 3. Select Adaptive Planning. 4. A **new tab** will open with the Adaptive Planning tool. **Adaptive Planning** You do **NOT** need to return to Workday. Adaptive Planning 3 on - Vanderbilt University Medical Cente 4 \bigcirc BC

Welcome to Workday Adaptive Planning

Top Apps

Quick Links

Adaptive Planning Workday

Community Webinar Join us on June 5 at 10AM PST to learn how to maximize the value from Adaptive Planning with Workday

Community.



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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.

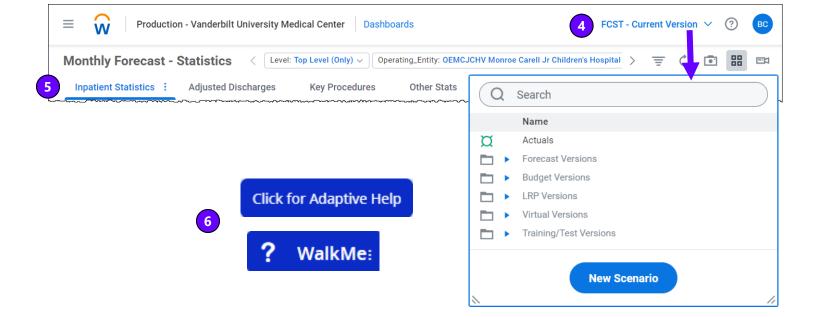
4. When you are in the dashboard, ensure that you are in the **correct version**. Please note that if you make changes to the data in another version other than those listed below, the changes will not save and will need to be redone in the correct version.

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.

Home	
Sheets >	
Reports >	Q forecast 3 ×
Dashboards 2	Name 🕇 🔒 3
Announcements >	Monthly Forecast - Expense and Labor
Processes	Monthly Forecast - Revenue
Workflow	Monthly Forecast - Statistics
Formulas	hun warne and a second and a second
Modeling >	
Administration	
ntegration >	
Support >	





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Navigating to Sheets:	= 🙀 Production - Vander
Select the Menu icon.	
Choose Sheets.	Home
ote: you can select the Sheets icon from the Homepage if you see it avail der Top Apps .	ilable Sheets >
There is a large number of sheets in the tool. Search for Budget, LRP, or	FCST Q fest ×
narrow down the results.	Name
Select the appropriate sheet.	FCST - Volume Drivers by Operating Entity FCST - Inflation/Impact of Economies
Ensure you are in the correct version. See step 4 on page 2.	FCST/BUD - OP Revenue Mapping FCST - Account Method Mapping
Use the appropriate options to filter the sheet.	FCST - IP Bed Plan
Production - Vanderbilt University Medical Center Sheets / FCST - Allocations: Pere	ercent of Revenue FCST - Current Version V ?
★ B ± 5 1 m B B B B C Q	F
	↓ →
III Levels Top Level (Only) V III Allocation_Type Percent of Revenue V III Operating_Entity	ity OEVUH Vanderbilt University Adult Hospital 🗸 💠 🗄 Department_Gro
# 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	249.091
	248,081

Navigating within the Sheets	Copy Forward
These functions can be used on the Sheets app or on the sheets built within the Dashboards.	Formula Assistant
If you right click in a cell a list of options will appear. The most helpful of which are listed below:	Adjust
1. Copy Forward—Allows you to copy the same number for the entire row.	Add Note
2. Explore Cell—Gives detailed information about the individual cell.	Explore Cell
3. Copy Row—Copies the row and adds that row to the sheet.	Add Row
4. Row Details—Gives Detailed information about the row	Copy Row
5. Display Options—Allows you to change the way the sheet appears, like suppressing	Delete Row
zeroes.	Row Details
	Display Options





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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.

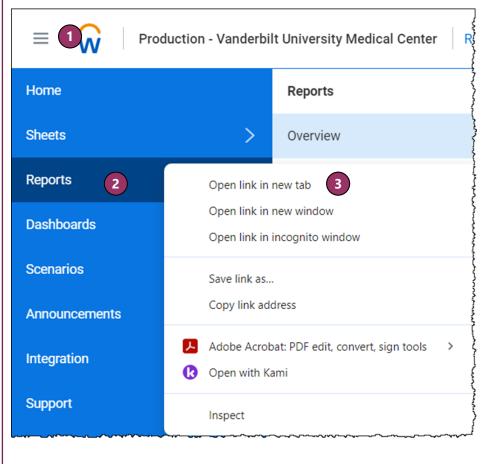
2. **Right click** on the **app** you wish to access (Reports, Sheets, or Dashboards).

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.



🖸 😧 Dashboards - Workday 🛛 🗙 🙀 Reports 🛛 🗙 🕂