



How to Utilize Workday Adaptive Insights

Office of Financial Planning & Analysis
University of Financial Services & Treasury

Overview

What is Workday Adaptive Insights?

3-3-2: Workday Financial Reports

- 3 Comparison Reports

- 3 Trend Reports

- 2 Budget vs. Actual Reports

Workday Adaptive Insights

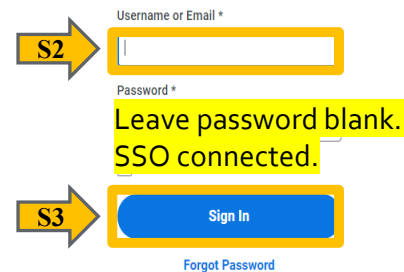
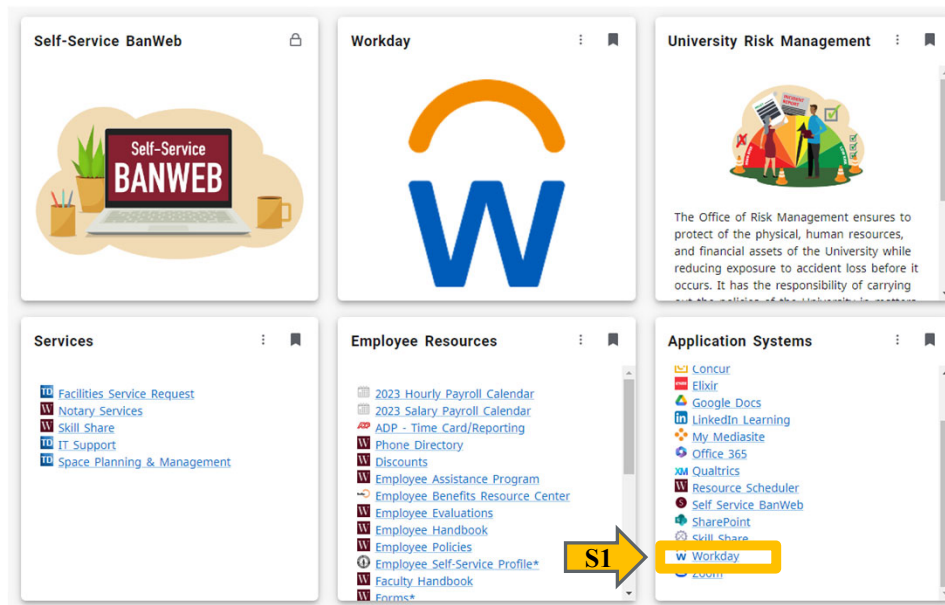
– An application that provides budgeting, forecasting, reporting, and analytics for all your financial planning needs.



Accessing Workday

Via: <https://my.westernu.edu/>

Directly: <https://login.adaptiveinsights.com/app>



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Workday is powered by 100% renewable energy.

3-3-2 Workday Financial Reports

The 3-3-2 Reports in Workday are a set of standard financial reports that are all encompassing. They were created to assist with budgetary and projection analysis.

Western University

Western University of Health Sciences

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Reports

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Reusable

Search

Name	Output	Location
<input type="checkbox"/> 1. YTD YOY Comparison (Actuals)	HTML	Shared
<input type="checkbox"/> 2. Quarter YOY Comparison (Actuals)	HTML	Shared
<input type="checkbox"/> 3. Month YOY Comparison (Actuals)	HTML	Shared
<input type="checkbox"/> 4. Yearly Trend (FY17-FY23 Actuals)	HTML	Shared
<input type="checkbox"/> 5. Quarterly Trend (Actuals)	HTML	Shared
<input type="checkbox"/> 6. Monthly Trend (Actuals)	HTML	Shared
<input type="checkbox"/> 7. Budget Vs Actual (FY23)	HTML	Shared
<input type="checkbox"/> 8. Budget Vs Actual (FY24 YTD)	HTML	Shared

Workday Financial Reports 1-3

The first three reports compare current period with the same period last year.
The three periods are Year-to-Date, Quarter, and Month.

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<input type="checkbox"/> 3. Month YOY Comparison (Actuals)	HTML	Shared

Select Prompting Parameters

1. YTD YOY Comparison (Actuals)

Current YTD	Jul-2023 ▼
Comparison YTD	Jul-2022 ▼
Level	College of Osteopathic Medic... ▼
Fund	1100 - Current Unrestricted ▼

Run Report

Cancel

Report 1
Year to date Year-Over-Year
Comparison

Select Prompting Parameters

2. Quarter YOY Comparison (Actuals)

Current Quarter	Q4-FY23 ▼
Comparison Quarter	Q4-FY22 ▼
Level	College of Osteopathic Medic... ▼
Fund	1100 - Current Unrestricted ▼

Run Report

Cancel

Report 2
Quarterly Year-Over-Year
Comparison

Select Prompting Parameters

3. Month YOY Comparison (Actuals)

Current Month	Jul-2023 ▼
Comparison Month	Jul-2022 ▼
Level	College of Osteopathic Medic... ▼
Fund	1100 - Current Unrestricted ▼

Run Report

Cancel

Report 3
Monthly Year-Over-Year
Comparison

Select Prompting Parameters

1. YTD YOY Comparison (Actuals)

Current YTD

Comparison YTD

Level

Fund

Run Report

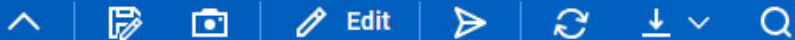
Cancel

Report 1

Year to date Year-Over-Year Comparison

- Select current month/year and comparison month/year.
- Select College/Department Rollup Level and Operating Fund 1100 within the Parameters.

Year-Over-Year comparison from beginning of fiscal year up to the last month selected.



Current YTD Jul-2023 Comparison YTD Jul-2022 Level College of Osteopathic Medicine Fund 1100 - Current Unrestricted

Accounts	Year to date as of Jul-2023	Year to date as of Jul-2022	Variance (\$)	Variance (%)
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Select Prompting Parameters

2. Quarter YOY Comparison (Actuals)

Current Quarter

Q4-FY23

Comparison Quarter

Q4-FY22

Level

College of Osteopathic Medic...

Fund

1100 - Current Unrestricted

Run Report

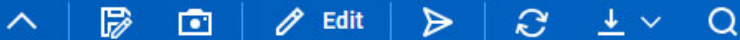
Cancel

Report 2

Quarterly Year-Over-Year Comparison

- Select current quarter/year and comparison quarter/year.
- Select College/Department Rollup Level and Operating Fund 1100 within the Parameters.

Quarter-over-quarter comparison for two selected quarters.



Current Quarter Q4-FY23

Comparison Quarter Q4-FY22

Level Western University Consolidated

Fund 1100 - Current Unrestricted

Accounts

Q4-FY23

Q4-FY22

Variance (\$)

Variance (%)

Select Prompting Parameters

3. Month YOY Comparison (Actuals)

Current Month	Jul-2023
Comparison Month	Jul-2022
Level	College of Osteopathic Medic...
Fund	1100 - Current Unrestricted

Run Report

Cancel

Report 3

Monthly Year-Over-Year Comparison

- Select current month/year and comparison month/year.
- Select College/Department Rollup Level and Operating Fund 1100 within the Parameters.

Month-over-month comparison for two selected months.



Current Month Jul-2023 Comparison Month Jul-2022 Level College of Osteopathic Medicine Fund 1100 - Current Unrestricted

Accounts	Jul-2023	Jul-2022	Variance (\$)	Variance (%)
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Workday Financial Reports 4-6

The next 3 reports help analyze trends by showing historical actuals by Year, Quarter, and Month.

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<input type="checkbox"/> 6. Monthly Trend (Actuals)	HTML	Shared
<input type="checkbox"/> 7. Budget Vs Actual (FY23)	HTML	Shared
<input type="checkbox"/> 8. Budget Vs Actual (FY24 YTD)	HTML	Shared

Select Prompting Parameters

4. Yearly Trend (FY17-FY23 Actuals)

Level

Fund

Run Report

Cancel

Report 4
Yearly Trend
(FY17-FY23 Actuals)

Select Prompting Parameters

5. Quarterly Trend (Actuals)

Level

FY

Fund

Run Report

Cancel

Report 5
Quarterly Trend

Select Prompting Parameters

6. Monthly Trend (Actuals)

FY

Level

Fund

Run Report

Cancel

Report 6
Monthly Trend

Select Prompting Parameters

4. Yearly Trend (FY17-FY23 Actuals)

Level

College of Osteopathic Medic...

Fund

1100 - Current Unrestricted

Run Report

Cancel





Edit






Level College of Osteopathic Medicine Fund 1100 - Current Unrestricted

[illegible]

Select Prompting Parameters

5. Quarterly Trend (Actuals)

Level

College of Osteopathic Medic... ▼

FY

FY2023 ▼

Fund

1100 - Current Unrestricted ▼

Run Report

Cancel

Report 5

Quarterly Trend

- Select College/Department Rollup Level, Fiscal Year, and Operating Fund 1100 within the Parameters.

Quarterly trend of actuals for specified year.



Level College of Osteopathic Medicine ▼ FY FY2023 ▼ Fund 1100 - Current Unrestricted ▼

Accounts

Q1-FY23

Q2-FY23

Q3-FY23

Q4-FY23

Total

Actuals

Actuals

Actuals

Actuals

Actuals

Select Prompting Parameters

6. Monthly Trend (Actuals)

FY	<div>FY2023</div>
Level	<div>College of Osteopathic Medic...</div>
Fund	<div>1100 - Current Unrestricted</div>

Run Report

Cancel

Report 6 Monthly Trend

- Select Fiscal Year
- Select College/Department Rollup Level and Operating Fund 1100 within the Parameters.

Monthly trend of actuals for multiple months for a specified year.



FY **FY2023** Level **College of Osteopathic Medicine** Fund **1100 - Current Unrestricted**

Accounts	Jul-2022	Aug-2022	Sep-2022	Oct-2022	Nov-2022	Dec-2022	Jan-2023	Feb-2023	Mar-2023	Apr-2023	May-2023	Jun-2023	Total
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Workday Financial Reports 7-8

The last two reports are comparison between budget and actuals. One is for the full year and the other is for year-to-date.

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<input type="checkbox"/> 6. Monthly Trend (Actuals)	HTML	Shared
<input type="checkbox"/> 7. Budget Vs Actual (FY23)	HTML	Shared
<input type="checkbox"/> 8. Budget Vs Actual (FY24 YTD)	HTML	Shared

Select Prompting Parameters

7. Budget Vs Actual (FY23)

Level	College of Osteopathic Medic... ▼
Fund	1100 - Current Unrestricted ▼
Period	Jun-2023 ▼

Run Report

Cancel

Report 7
Budget Vs. Actual
(FY23)

Select Prompting Parameters

8. Budget Vs Actual (FY24 YTD)

Level	College of Osteopathic Medic... ▼
Fund	1100 - Current Unrestricted ▼
Current Period	Jul-2023 ▼

Run Report

Cancel

Report 8
Budget Vs. Actual
(FY24 YTD)

Select Prompting Parameters

7. Budget Vs Actual (FY23)

Level	College of Osteopathic Medic... ▼
Fund	1100 - Current Unrestricted ▼
Period	Jun-2023 ▼

Report 7

Budget Vs. Actual (FY23)

- Select College/Department Rollup Level and Operating Fund 1100 within the Parameters. Select period.

Budget vs. Actual that considers account POs for FY23.

Run Report

Cancel



Level College of Osteopathic Medicine ▼ Fund 1100 - Current Unrestricted ▼ Period Jun-2023 ▼

Accounts	Year to date as of Jun-2023			
	Adjusted Budget	Actuals	Variance (\$)	Variance (%)

Select Prompting Parameters

8. Budget Vs Actual (FY24 YTD)

Level	College of Osteopathic Medic... ▼
Fund	1100 - Current Unrestricted ▼
Current Period	Jul-2023 ▼

Run Report

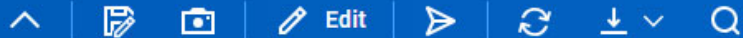
Cancel

Report 8

Budget Vs. Actual (FY24 YTD)

- Select College/Department Rollup Level and Operating Fund 1100 within the Parameters. Select period.

Budget vs. Actual that considers account POs for FY24.



Level College of Osteopathic Medicine ▼ Fund 1100 - Current Unrestricted ▼ Current Period Jul-2023 ▼

Accounts	Year to date as of Jul-2023			
	FY24 Adjusted Budget Operating Fund	Operating Funds	FY24 Encumbrances Operating Fund	Variance (\$)
				Variance (%)

Returning to the Reports Page

To return to the Reports page click the menu icon then Reports.

The screenshot shows the Western University of Health Sciences navigation interface. At the top, a header bar contains the university logo, the name 'Western University of Health Sciences', and a 'Home' link. Below the header is a blue sidebar menu with options: Home, Sheets, Reports, Dashboards, Announcements, Processes, and Support. The 'Reports' option is highlighted with a yellow box and labeled 'S2'. To the left of the 'Reports' option is a yellow arrow labeled 'S1' pointing to a menu icon (three horizontal lines) in the top header bar. To the right of the sidebar is a dark grey content area. It features a search bar at the top, followed by a table with three columns: Name, Output, and Location. The table lists eight reports, all with 'HTML' as the output and 'Shared' as the location.

Name	Output	Location
1. YTD YOY Comparison (Act...	HTML	Shared
2. Quarter YOY Comparison (...)	HTML	Shared
3. Month YOY Comparison (A...	HTML	Shared
4. Yearly Trend (FY17-FY23 A...	HTML	Shared
5. Quarterly Trend (Actuals)	HTML	Shared
6. Monthly Trend (Actuals)	HTML	Shared
7. Budget Vs Actual (FY23)	HTML	Shared
8. Budget Vs Actual (FY24 YT...	HTML	Shared

Support Team

Budget Requests

- Budget related items – budget@westernu.edu

Financial Reporting

- FP&A related items – fp&a@westernu.edu