Workday Adaptive Insights Login Page and Navigation

Overview: The following document contains instructions on how to sign into Workday Adaptive Insights 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 fp&a@westernu.edu.

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.
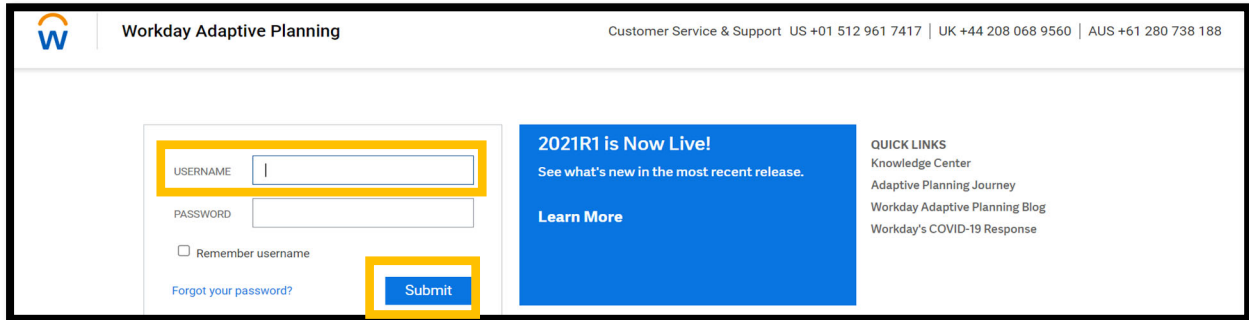

Sections:

1. •Accessing Workday Adaptive Insights Login Page
2. •Accessing Announcements
3. •Accessing Sheets
4. •Accessing Reports
5. •Accessing Dashboards
6. •Logging Out

Step 1: Go to https://login.adaptiveinsights.com/.
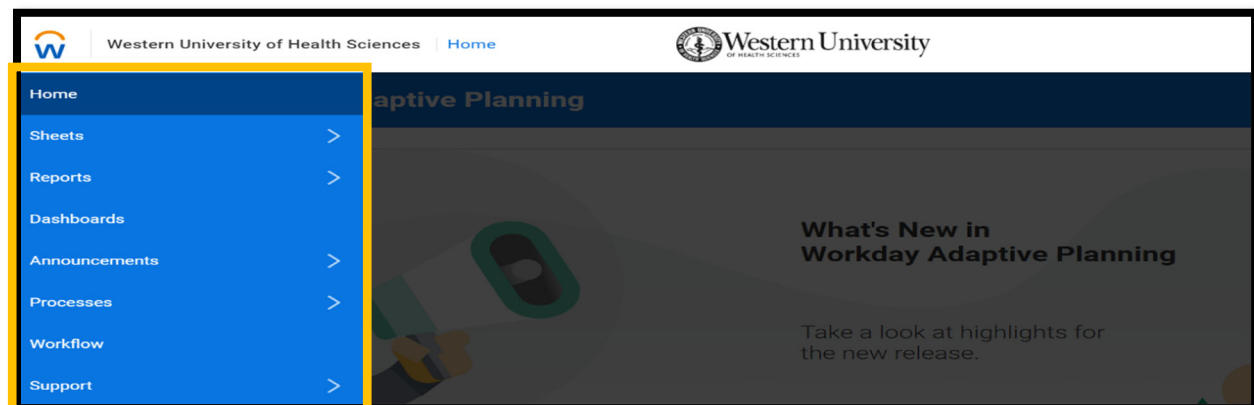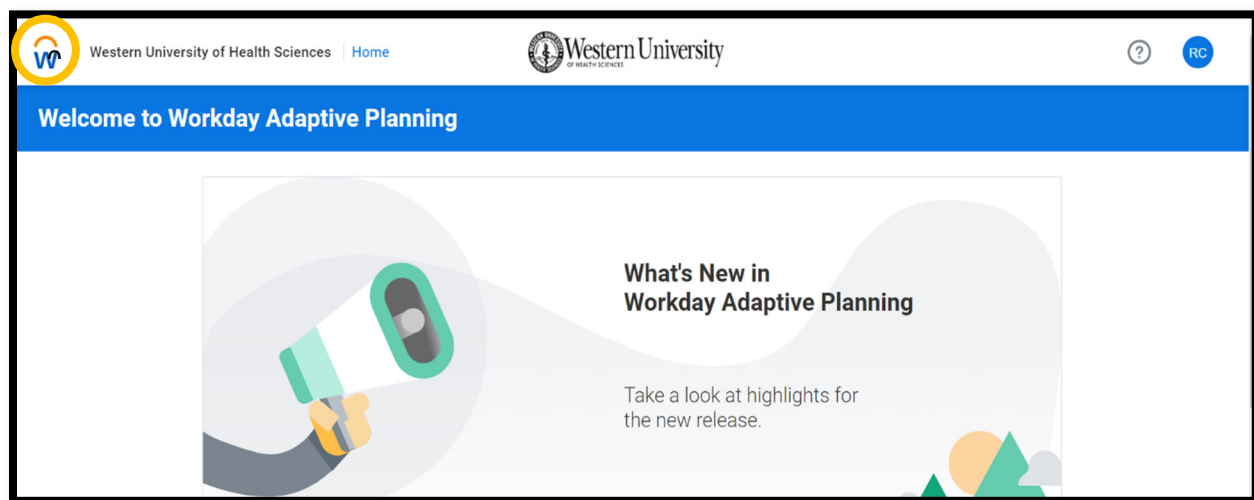
Step 2: Enter your WesternU email as your username. Because Workday single sign on feature is enabled, the password field can be left blank.
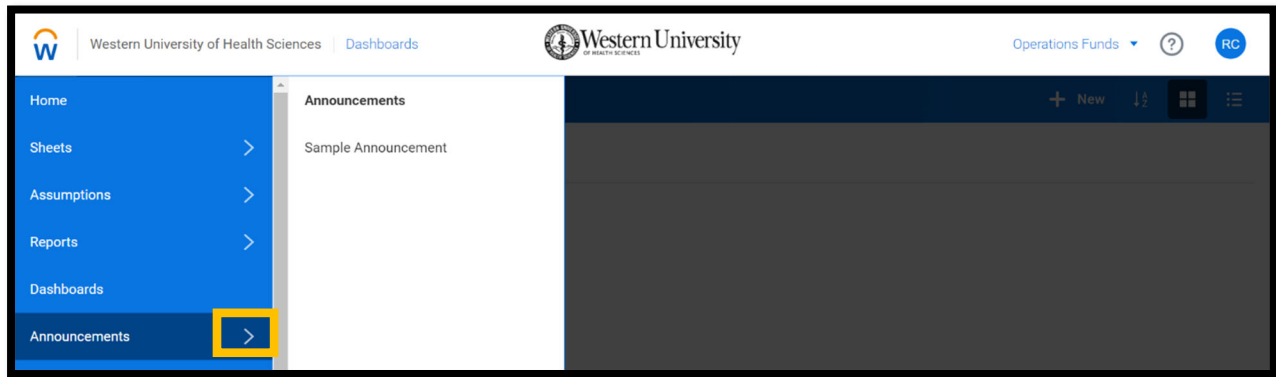
Step 3: Click the **"Submit"** icon.

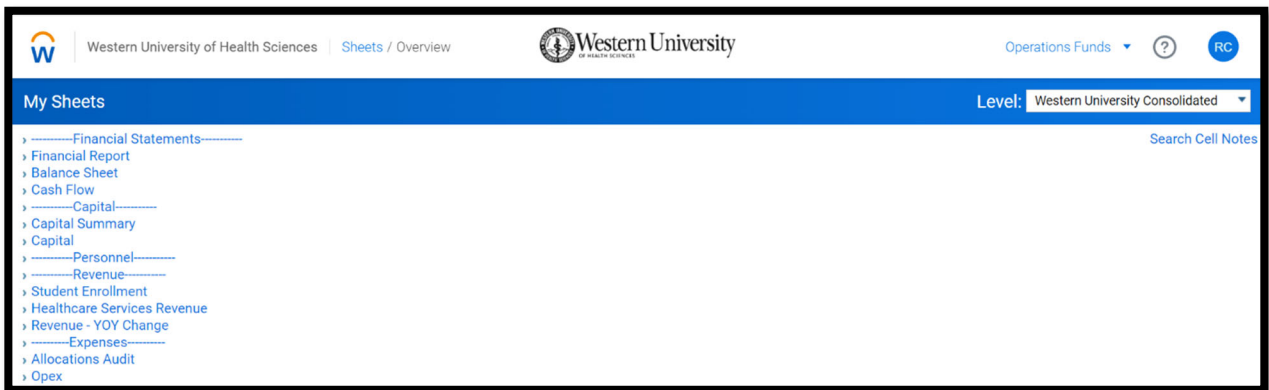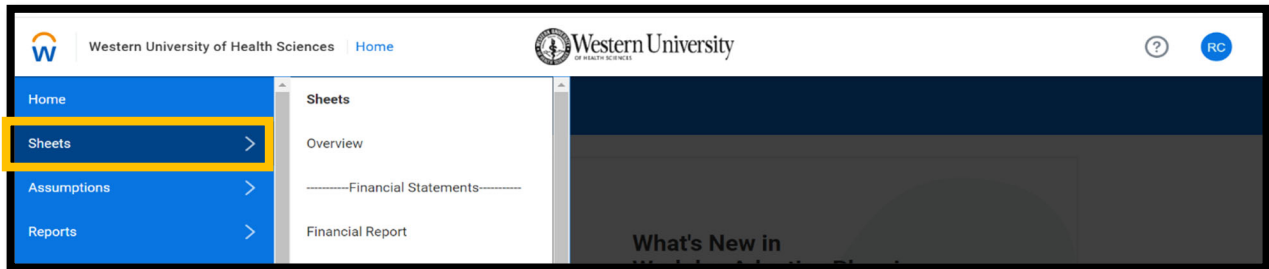**Step 4:** Click on the " W " icon on the top left-hand corner to display the main navigation menu.

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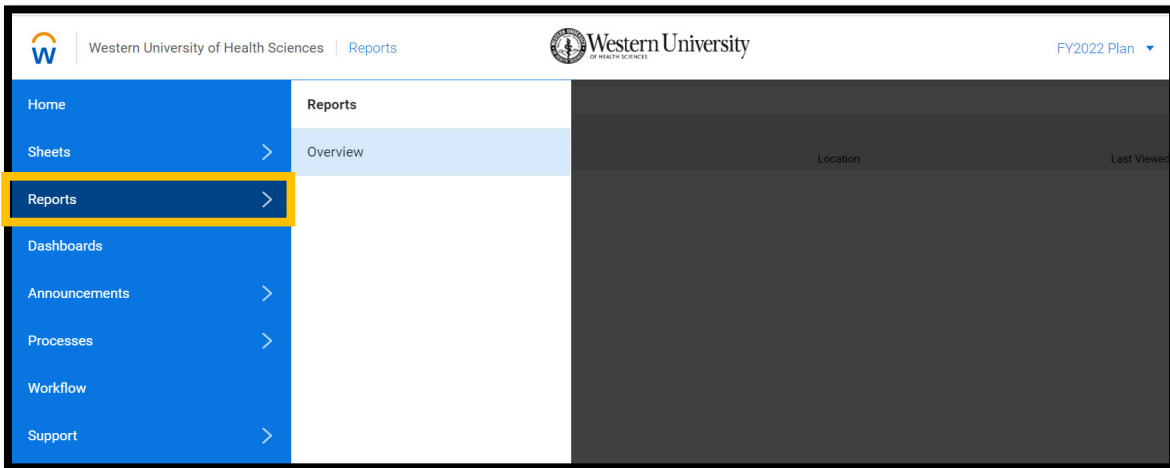
Step 1: Click on the **">"** symbol next to sheets to bring up a list of available planning sheets or click **"Sheets"** to bring up the list of sheets on another page called my sheets.
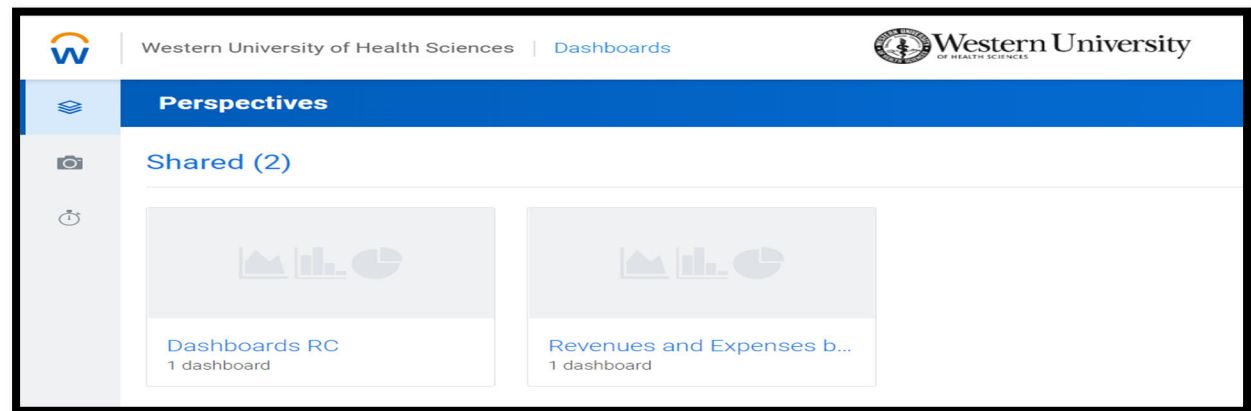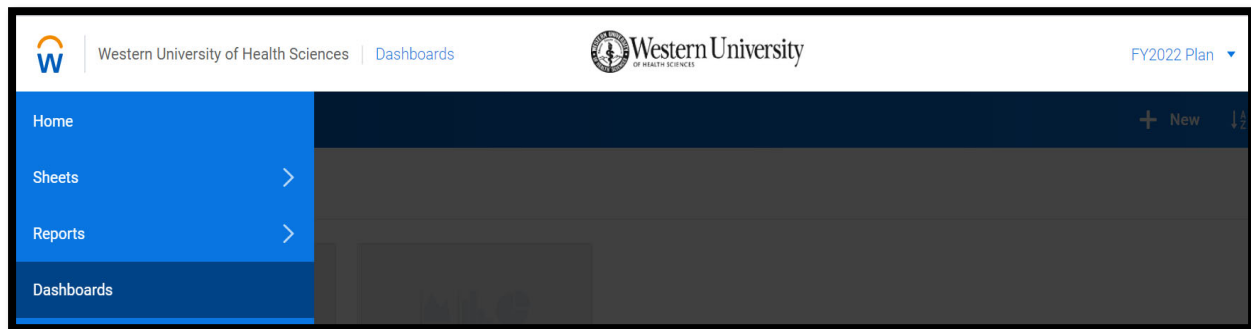
Section IV: Accessing Reports

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.

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

Step 1: Click the blue icon with your initials " RC " and click the " Sign Out " icon.