

Accessing and Viewing Personnel Planning Sheets

Overview: The following document contains instructions on how to use Workday Adaptive Insight to access Personnel Planning Sheets. Please note that the Personnel Planning sheets mainly include operating funds positions. We are currently working on updating non-operating funds positions. For additional assistance, please reach out to the Office of Financial Planning and Analysis at fp&a@westernu.edu.

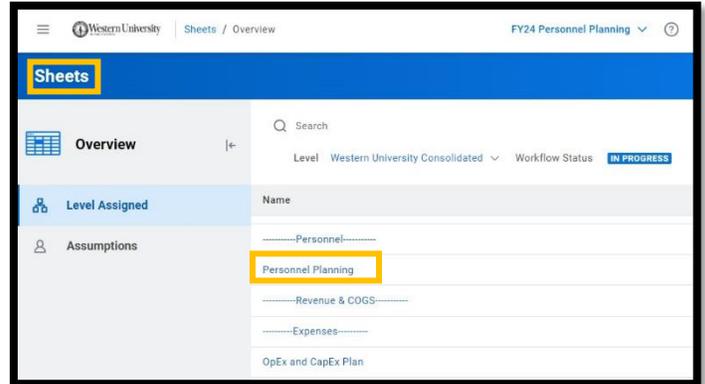
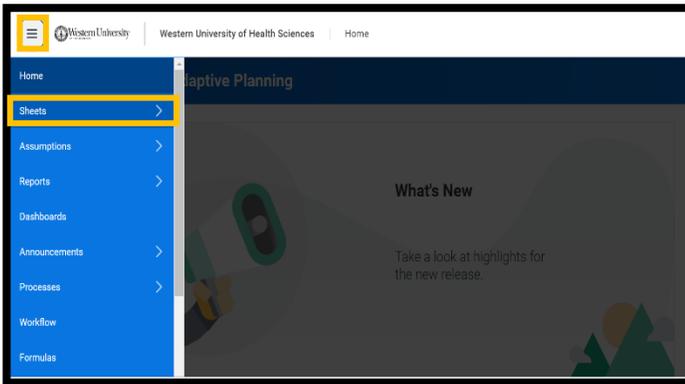


Sections:

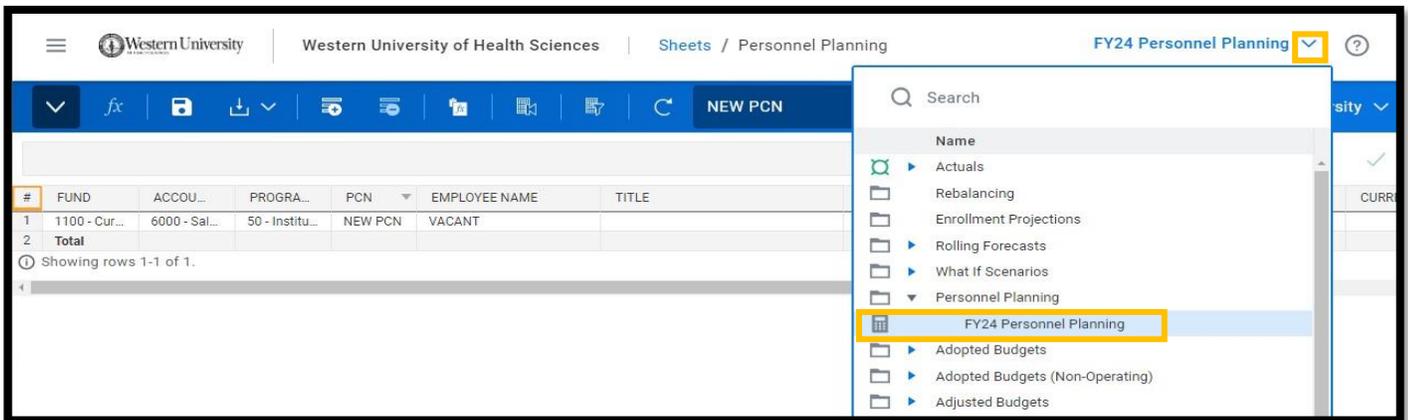
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Step 1: Go to the Sheet in Workday. Click “☰”. Select “Sheets” and click it, scroll down and select “Personnel Planning” worksheet.

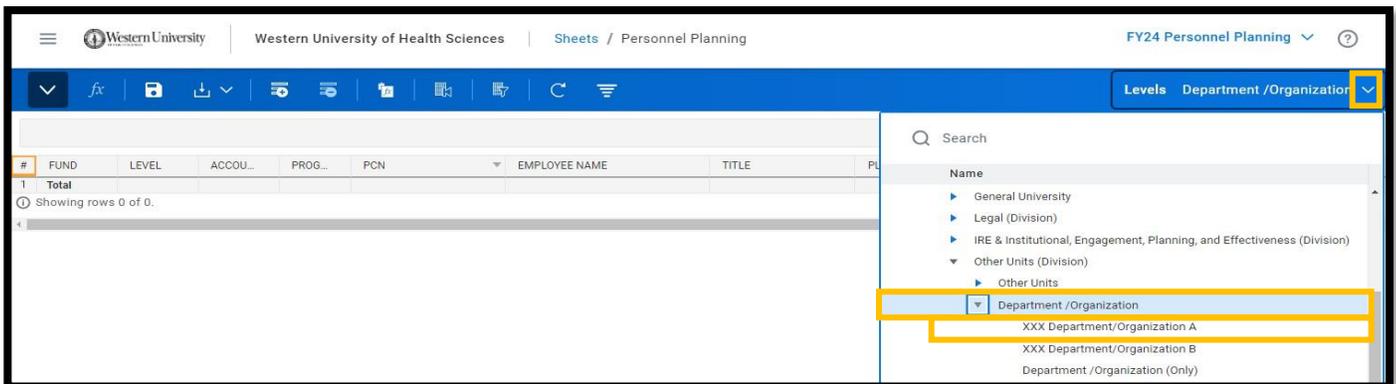


Step 2: Select Version. Select “FY24 Personnel Planning” version on the upright side drop list of Workday from the Personnel Planning Folder.



Step 3: Select Level. Select your organization under “Level”.

Please note that you will see all personnel information if select the rolled-up level (in the illustration Department/Organization) and only personnel information if select the child level (in the illustration it is XXX Department/Organization A).



Now the Personnel Planning Sheet for your organization is available for review.