## **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 <u>fp&a@westernu.edu</u>.



## Sections:



## **Accessing and Viewing Personnel Planning Sheets**

**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.

	Western University     Western University of Health Sciences     Sheets / Personnel Planning     FY24 Personnel Planning									~	3		
	✓ fx		± ~   :	• •		<b>B</b>	C	NEW PCN	C	2	Search		sity 🗸
1											Name		
									a		Actuals	-	$\checkmark$
#	FUND	ACCOU	PROGRA	PCN T	EMPLOYEE NAME	TITL	E				Rebalancing		CURRI
1	1100 - Cur	6000 - Sal	50 - Institu	NEW PCN	VACANT	1					Enrollment Projections		
2	Total										Rolling Forecasts		
0 5	showing rows	: 1-1 of 1.								۲	What If Scenarios		
4										•	Personnel Planning		
											FY24 Personnel Planning		
										۲	Adopted Budgets		
										۲	Adopted Budgets (Non-Operating)		
										•	Adjusted Budgets		

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).

Western University     Western University	FY24 Personnel Planning 🗸 🕜		
✓ fx   ■ ± ~   ■ ■	🛅   🖺   🗗   C 📼		Levels Department /Organization
# FUND LEVEL ACCOU PROG	PCN EMPLOYEE NAME	TITLE PL	Q Search
1 Total ① Showing rows 0 of 0.			Name  General University  Legal (Division)  IRE & Institutional, Engagement, Planning, and Effectiveness (Division)  Other Units (Division)  Other Units  Department /Organization  XXX Department/Organization A  XXX Department/Organization B Department /Organization (Only)

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