



Workday Adaptive Planning for reporting and analytics

Workday Adaptive Planning provides intuitive, self-service reporting for analysts, managers and executives. Finance and business users can quickly report on actuals, and plan and forecast information from Workday Adaptive Planning. Online reports automatically sort and subtotal across dimensions. Drill-down and flexible parameters make it easy to analyse data from multiple scenarios. Intelligent links to Microsoft Office automate report packages and presentation refresh, allowing users to make faster, more informed business decisions.

Use data to impact performance

Reporting is critical for successful enterprise planning. Empower teams across your organisation to better understand business performance with powerful, self-service reports. Access ad hoc and formatted reporting on scenarios, actuals, metrics and other data with an easy-to-use, drag-and-drop interface that never requires script writing. Workday Adaptive Planning makes it easy to create, maintain and share operational and financial KPIs and insights.

Key Benefits

- Create sophisticated reports with ease using the flexible drag-and-drop report builder
- Perform ad hoc analytics and slice and dice your data, leveraging all the dimensions and hierarchies of your model
- Generate reports in tabular or graph format in HTML, PDF or Microsoft Excel
- Seamlessly weave any data from Workday Adaptive Planning across Microsoft Excel, Word and PowerPoint with OfficeConnect
- Analyse actuals and plan data to better understand profit by product or region, and expenses by project or department, plus similar analyses
- Provide self-service reporting to department users
- Minimise the number of required reports since users can run the same report and only see data allowed in their security profiles
- Edit your plan in real time and see the impact of changes on your dashboards

Category	Year to Date (YTD) 2019					Year to Date (YTD) 2020				
	Actuals	Budget	Variance	% Var	Trend	Actuals	Budget	Variance	% Var	Trend
Operating Expenses	6,662,000	6,700,000	-38,000	-0.6%	↔	6,267,000	6,800,000	-533,000	-7.8%	↔
Selling & Marketing	500,000	500,000	0	0%	↔	500,000	500,000	0	0%	↔
R&D	10,000	10,000	0	0%	↔	10,000	10,000	0	0%	↔
G&A	1,000	1,000	0	0%	↔	1,000	1,000	0	0%	↔
Admin	1,000	1,000	0	0%	↔	1,000	1,000	0	0%	↔
Finance	10,000	10,000	0	0%	↔	10,000	10,000	0	0%	↔
Legal	10,000	10,000	0	0%	↔	10,000	10,000	0	0%	↔
IT	10,000	10,000	0	0%	↔	10,000	10,000	0	0%	↔
HR	10,000	10,000	0	0%	↔	10,000	10,000	0	0%	↔
Other	10,000	10,000	0	0%	↔	10,000	10,000	0	0%	↔
Total	6,662,000	6,700,000	-38,000	-0.6%	↔	6,267,000	6,800,000	-533,000	-7.8%	↔

Example of variance analysis.

Drill down into the details with ease

Get instant transparency into transaction details. Whether you're drilling down into a report or a planning sheet, you can create reports with just one click. Get the level of detail you want, with the right context and the fields you need.

End-to-end self-service reporting

Create personalised, ad hoc reports in a snap. Intuitive drag-and-drop web reporting puts you in control with interactive, slice-and-dice reporting across dimensions and metrics. Instantly generate, distribute and review up-to-the-minute management reports, and share detailed insights with your team.

Minimise human error

Building manual reports can be a time-consuming, error-prone process of copying and pasting data and making sure the reports are accurate and up to date. With Workday Adaptive Planning, you can take your time back and improve data accuracy by moving to cloud-connected board and external reporting.

Create data visualisations on the fly

Visualising data is often the fastest way to identify trends and patterns that lead to insights. With active dashboards, you can bring sheets and visualisation together on a single dashboard and see the impact of your changes in real time, identify the root cause, and course-correct to achieve your goals and objectives.

Drive the conversation about results

Measuring KPIs and tracking progress is easier when you're able to work together to improve results. Powerful analytics and interactive dashboards make it easy to display and share business results with operational executives. It's as simple as sharing visualisations and charts directly from the dashboard in presentation mode or by adding stakeholders to documents as PNG files for easy distribution and collaboration.

To learn more about Workday Adaptive Planning for reporting and analytics, visit <https://www.workday.com/en-gb/products/adaptive-planning/financial-planning/analytics-reporting.html>.

