

Workday-Adaptive-Planning

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Version Demo

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QUESTION NO: 1

An OPEX model uses headcount data linked from a personnel sheet. When testing with sample data, all expense results appear in the location dimension value of 'Uncategorized.' What corrections need to be made to populate the location values?

- A. The personnel sheet needs to be planned with the location dimension.
- B. The personnel sheet needs modeled accounts for each location.
- C. The OPEX formulas need to have Data Privacy set to 'Public at all levels.'
- D. The OPEX formulas need term modifiers for location.

ANSWER: A

Explanation:

The personnel sheet needs to be planned with the location dimension. In Adaptive Planning, dimensional context must exist on the source data for it to carry through a linked-account calculation into another sheet or cube. The personnel sheet is the source of the headcount values used by the OPEX model. If headcount is entered without Location as a planning dimension, those records have no Location member associated with them. When the OPEX model links to those values, Adaptive Planning cannot allocate the results to a specific location and therefore displays them under *Uncategorized*.

Adding Location as a planning dimension on the personnel sheet allows planners to enter or load headcount by the relevant location members. The resulting source intersections then include Location, so linked OPEX calculations retain that dimensional attribute and expenses populate against the corresponding locations. This design is especially important for workforce-driven expense planning because compensation and benefit calculations commonly inherit organizational dimensionality from the workforce data. Workday describes Adaptive Planning as supporting multidimensional plans that can be analyzed across organizational dimensions, including locations and departments. See the [Workday Adaptive Planning product page](#) and the [Workday Adaptive Planning datasheet](#).

QUESTION NO: 2

An administrator imports actual expenses at the parent level called Corporate Services, while the hierarchy already contains child levels for IT, Legal, and Facilities. After the import, the parent must continue to roll up its children and retain the directly imported parent-level amount. What behavior should the administrator expect?

- A. The parent level becomes a leaf level and no longer aggregates its children.
- B. The imported amount is distributed proportionally to the IT, Legal, and Facilities levels.
- C. Adaptive Planning creates a Corporate Services (Only) level to retain the directly imported amount.
- D. The imported amount replaces the rollup total from the IT, Legal, and Facilities levels.

ANSWER: C

Explanation:

Adaptive Planning creates a Corporate Services (Only) level to retain the directly imported amount. Directly imported data at a parent level is stored in an automatically managed (*Only*) level so that the parent can still aggregate its existing children. This prevents the parent-level import from replacing or obscuring the detailed IT, Legal, and Facilities amounts. Importing to the parent does not convert the parent into a leaf level or reallocate the imported value automatically to its children.

QUESTION NO: 3

The financial analyst is updating the formula for the Office Supplies account and needs to incorporate the full year office supplies expenses from the previous fiscal year. What formula should the analyst implement to retrieve last year's value?

- A. `ACCT.OfficeSupplies[time=last.year]`
- B. `ACCT.OfficeSupplies[time=this.year-1]`
- C. `ACCT.OfficeSupplies[year=previous]`
- D. `ACCT.OfficeSupplies[time=this-12]`

ANSWER: B

Explanation:

`ACCT.OfficeSupplies[time=this.year-1]` is the appropriate formula because the `time` modifier can target a year-level period rather than an individual month. `this.year` identifies the fiscal year containing the formula's current time context, and subtracting one selects the immediately preceding fiscal year. Consequently, the Office Supplies account is evaluated at the prior year's annual level, returning the full fiscal-year amount needed for a year-over-year expense calculation.

This distinction is important in Adaptive Planning formulas: year-level time references use the fiscal calendar configured for the model and return the value for that annual period. The formula therefore remains aligned with the organization's fiscal-year definition, including situations where fiscal years do not match calendar years. It is a direct, maintainable way to use prior-year actual or planned Office Supplies values in a calculated account, without requiring separate references for each period in the prior year. Workday describes Adaptive Planning as supporting continuous planning and modeling across organizational financial data; product information is available at [Workday Adaptive Planning](#). Detailed customer documentation, including formula and time-reference guidance, is available through the authenticated [Workday Community](#).

QUESTION NO: 4

A planning team needs to collect a separate record for every proposed capital project. Each record must include a project start date, expected completion date, project owner, and planned spend by period. New projects must be added by planners throughout the forecast cycle and the costs must roll up to corporate capital expenditure reporting. Which design best meets these requirements?

- A. Use a standard sheet with one account for each capital project.
- B. Use a modeled sheet with one row for each capital project.
- C. Use a cube sheet with project dates as account attributes.
- D. Use an assumption account for each project owner.

ANSWER: B

Explanation:

Use a modeled sheet with one row for each capital project. A modeled sheet is appropriate when planners must maintain a variable number of detailed business records, each with its own fields and calculated logic. Project dates, owners, and planned costs can be captured at the row level, while the resulting costs can roll up for financial reporting. A standard sheet is better for a fixed account-based planning layout, and a cube sheet is better for planning at defined dimensional intersections rather than maintaining individual project records.

QUESTION NO: 5

A rollup account called Total Operating Expenses aggregates the balance of the child accounts called Salaries and Rent. If the Rent account is removed from the Adaptive Planning model, what will be the immediate impact on the formula and data?

- A. The formula and data will be automatically transferred to the remaining child account, Salaries.
- B. The formula and data will be automatically reassigned to the rollup account, Total Operating Expenses.
- C. The formula and data will be permanently deleted across all versions and levels.**
- D. The formula and data will be preserved within an archived leaf account in the system.

ANSWER: C

Explanation:

The formula and data will be permanently deleted across all versions and levels. In Adaptive Planning, an account is a structural object in the model, and its data—including entered values, calculated results, and account-level formulas—is associated with that account's presence in the model. Removing the Rent account deletes that account rather than merely removing it from the Total Operating Expenses rollup relationship. Consequently, information stored against Rent is no longer available for reporting, planning, or calculation in any version or level where it previously existed. The rollup account continues to aggregate its remaining valid children, but deletion does not retain the removed account's planning history as an active account object. Because deleting model structure can have broad downstream effects on sheets, formulas, reports, and integrations, administrators should review dependencies and use an export, copy, or other appropriate retention process before removing accounts when historical values or formulas must be retained. This behavior supports model integrity by ensuring that account formulas and data do not remain attached to an object that no longer exists. See the [Workday Adaptive Planning product overview](#) and the [Workday Community](#) for product documentation and administrative guidance.

QUESTION NO: 6

An administrator needs to add prior and future years to the existing calendar without affecting the current time strata structure. Which import option should they use when importing the updated calendar file?

- A. Update
- B. Reload entire structure
- C. Overwrite
- D. Append**

ANSWER: D

Explanation:

Append is the appropriate calendar-import option when the goal is to extend an existing calendar with additional historical or future years while preserving the current time strata configuration. In Adaptive Planning, the calendar defines the planning model's time hierarchy, including the relationship among years, quarters, months, weeks, and any configured custom periods. Appending uses the incoming calendar file to add the new time ranges to the existing calendar rather than rebuilding the established structure. This is particularly important for a live planning model because existing sheets, versions, formulas, reports, and historical data rely on the current calendar and its time-strata relationships. The imported file should therefore contain the required additional years and align with the existing calendar's period pattern and fiscal-calendar design. Administrators should validate the expanded date range and period definitions in a nonproduction environment when possible before applying the change to production. Workday describes Adaptive Planning as a platform for connected financial planning and operational planning at [Workday Adaptive Planning](#). Customers can access detailed, release-specific administrative procedures and calendar-import guidance through the authenticated [Workday Community](#) documentation portal.

QUESTION NO: 7

What dashboard mode allows users to interact with charts by selecting data points for further exploration and data analysis?

- A. View**

- B. Grid
- C. Presentation
- D. Snapshots

ANSWER: A

Explanation:

View is the dashboard mode intended for consuming and analyzing published dashboard content. In this mode, users can work directly with interactive visualizations, including selecting chart elements and using the dashboard's available interactions to investigate data in more detail. This supports common planning and reporting workflows: a user starts with a summarized KPI or visual trend, selects a relevant data point or chart segment, and follows the configured interaction to examine the related information, such as filtered detail or another linked view. The interaction is governed by the dashboard design and by the user's access to the underlying modeled data, so users see only data they are authorized to view. Workday Adaptive Planning dashboards are designed to present planning data through interactive reporting and visualization capabilities, enabling business users to explore performance and make informed decisions without changing the dashboard's underlying design. For an overview of Adaptive Planning reporting, dashboards, and analytics capabilities, see [Workday Adaptive Planning](#) and [Workday Adaptive Planning Reporting and Analytics](#).