



## How to Use the Sandbox – FY26 Scenario Planning version in Workday Adaptive Planning

---

### Overview

The Sandbox – FY26 Scenario Planning version is a copy of the FY26 Operating Budget Proposal version in Workday Adaptive Planning. It was made on Wednesday, March 19, 2025.

**It is a stand-alone copy and data entered here will NOT be migrated back into the Proposal version.** It exists to support scenario planning and “what-if” modelling by giving planners a place to enter data to compare to the Proposal version.

### How does it work?

The Sandbox version functions generally the same way as the Proposal version does. **PLEASE TAKE CAUTION TO ENSURE YOU ARE WORKING IN THE RIGHT VERSION IF EDITING DATA.**

- Access is granted and limited the same as the Proposal version.
- Sheet entry will work the same way and all sheets available in the Proposal version are available in the Sandbox version.
- The Sandbox version is selectable as a parameter in reports.
- In the Sandbox version, Actuals Overlay is turned on and overlays actuals for the period July 1, 2024 to Dec 31, 2024.
- Central Assumptions remain unchanged.
- Sheet 3 – Employee Roster was updated with data from HCM as of February 15, 2025.
- All loaders will update nightly including Net Position, Core Fund Distributions Revenue entries for Merit Increases and Fixed Costs, and Data Extract.
- **NOTE:** unlike the Proposal version, the Sandbox version is not currently available in the EDW plan table.

### Suggested Approaches

#### 1) Enter new rows to record adjustments in the Sandbox

- a) An approach that will preserve copied data from the Proposal version is to enter adjustments as new rows, clearly marked with text in the Notes column of any sheet indicating the row is an adjustment and possibly using a consistent identifying text string to make the Notes column reliably filterable using Display Options.
- b) Reports, like A1420.1 – Version Comparison report, will then aggregate all rows by the dimensions on those rows (e.g., CC, RS, Ledger account, etc) so the Sandbox version data will differ from the Proposal version data based on unique and filterable entries.

## **2) Iterate**

- a) Take advantage of the Sandbox by trying different scenarios out to compare them. As data will change based on the scenario being modeled, be sure to save reports for reference by exporting to Excel or to a PDF or by taking a Snapshot in Adaptive.

## **3) Balance Effort for Value**

- a) Until directed to make adjustments, this Sandbox version is for strategic planning and to support “what if” modelling for unit evaluation and planning.
- b) When directed to make adjustments by UW leadership, data entry will need to happen in the Proposal version manually.
- c) Data from the Sandbox will not be migrated or automatically published to the Proposal version.
- d) Therefore
  - i) Limit detailed plan entry in the Sandbox to only the necessary work to aid your unit’s “what if” planning
  - ii) Consider using lump sums at hierarchy levels to “rough in” adjustments, making plans to do the entry work at the required level of detail in the Proposal version if and when directed to do so.
  - iii) Consider using lump sum \$ amounts in Sheet 5 to adjust compensation expenses, where this will support “what if” planning appropriately.
  - iv) Consider using a single CC or PG to record all adjustment entries if that CC/PG will roll-up appropriately to allow for accurate reporting.
  - v) Use Display Options to limit data on your sheet to the area of focus for adjustments and utilize column totals.

## **4) Consider carefully whether to use Adjust functionality**

- a) Adaptive allows quick adjustment of all selected entries on a sheet through the “Adjust” functionality in the right click options menu on Sheets.
- b) Adjust allows planners to edit existing sheet entries by a specified \$ amount or % amount evenly across all entries or proportionately. This can be a quick way to adjust entries up or down without the use of formulas or calculations.
- c) However, once adjusted YOU CANNOT UNDO and would need to adjust in the opposite direction to return to your original values.
  - i) Consider downloading the sheet you are working on to Excel before adjusting, so that you can retain a copy of the data.
- d) Depending on the “what if” scenario being modeled, this may be a useful shortcut or it may be more trouble than it’s worth. Plan carefully before using adjust.