

Workday Workday Adaptive Planning

Workday Pro Adaptive Planning Certification

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Updated Exam Questions**

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Version: 4.0

Question: 1

The budgeting team would like to incorporate an inflation rate into several different formulas. This inflation rate might be adjusted later on, so the team would like to be mindful of the maintenance effort and store it in one place. What account type allows for data entry at the "Top Level (Only)" to accommodate this?

- A. Modeled
- B. Metric
- C. Assumption
- D. Custom

Answer: C

Explanation:

Assumption accounts in Workday Adaptive Planning are purpose-built for storing global constants — such as inflation rates, tax rates, or standard multipliers — that are referenced across multiple formulas and sheets. By design, Assumption accounts allow data entry at the Top Level (Only), meaning a single value is maintained centrally and referenced uniformly throughout the model. This aligns with best practices for model maintainability: rather than hard-coding values into individual formulas, a central Assumption account serves as the single source of truth. When the inflation rate changes, the administrator updates one cell, and all dependent formulas recalculate automatically.

This eliminates version drift and ensures consistency across the entire model. Modeled accounts are used for row-based planning; Metric accounts display calculated KPIs but are not editable input stores; Custom accounts have different structural roles. Assumption accounts are foundational in Adaptive Planning's architecture and appear prominently in the Accounts configuration under Model Management. Reference: Workday Adaptive Planning — Accounts Setup, Assumption Account Configuration, Model Management.

Question: 2

The finance team wants to create a sub-account for the Inventory General Ledger account. What will happen to the existing balance in the Inventory General Ledger account once the sub-account is created?

- A. The formulas and data are deleted for all versions and all levels.
- B. Data and any formulas move to the new child account.
- C. The formulas and data are duplicated.
- D. Data and any formulas stay in the Inventory account.

Answer: B

Explanation:

In Workday Adaptive Planning, when a sub-account (child account) is created beneath an existing General Ledger account, the system converts the parent account into a rollup account. As part of this structural transformation, all existing data and any formulas that were previously stored in the parent Inventory account are automatically migrated to the newly created child account. The parent then becomes a rollup that aggregates the values of its children. This behavior ensures no data loss during model restructuring. The rationale is that rollup accounts do not hold direct data — only leaf accounts (bottom-level accounts without children) can contain input values or formulas. Therefore, the system must relocate the data to maintain model integrity. Administrators should be aware of this behavior before creating sub-accounts in live environments, as it directly affects reporting and formula references. Existing reports may need to be updated to reflect the new account reference. Reference: Workday Adaptive Planning — Chart of Accounts, Account Hierarchy, Sub-Account Creation Behavior.

Question: 3

You are the administrator for Adaptive Planning and need to create a permission set for a new group of users who will be responsible for entering budget data into the system. These budgeters should be able to: Add values to existing plan estimates. View reports and dashboards to understand the budgeting context. What permission set template would you use as the basis of a new permission set to achieve this functionality?

- A. Power User
- B. View Only
- C. Contributor
- D. Implementor

Answer: C

Explanation:

The Contributor permission set template in Workday Adaptive Planning is specifically designed for users who need to enter budget data into planning sheets while also being able to view reports and dashboards. Contributors can add and modify values in sheets they have access to, which satisfies the requirement to add values to existing plan estimates. They also receive read access to reports and dashboards, fulfilling the contextual visibility requirement. The Power User template grants broader administrative capabilities that exceed what a standard budgeter requires. View Only limits users to read-only access with no data entry capabilities, making it inappropriate for budget input. Implementor is an elevated administrative role for system configuration and model building. The Contributor template is the optimal baseline because it is scoped precisely to the data entry and reporting visibility functions described, and it can be further refined by the administrator to limit access to specific levels or sheets. Reference: Workday Adaptive Planning — Security and Permission Sets, User Roles, Contributor Template Configuration.

Question: 4

You need to create a sub-version. For what kind of version do you create the sub-version?

- A. Plan
- B. Virtual
- C. Actuals
- D. Hidden

Answer: A

Explanation:

In Workday Adaptive Planning, sub-versions can only be created under Plan versions. Sub-versions allow organizations to maintain multiple planning scenarios or iterations beneath a single parent Plan version — for example, a Best Case, Base Case, and Worst Case sub-version under a single Annual Plan. This structure supports scenario planning and budget iterations without creating entirely separate top-level versions for each scenario. Virtual versions are read-only versions derived from formulas that blend data from other versions; they do not support sub-versions. Actuals versions store historical financial data imported from the general ledger and are immutable in structure. Hidden versions are used for intermediate calculations and are not directly user-accessible. The sub-version feature is exclusively a Plan version capability, enabling planners to track multiple budget iterations within a controlled, hierarchical version structure. Reference: Workday Adaptive Planning — Version Management, Plan Versions, Sub-Version Creation.

Question: 5

How can you report on alternate level groupings within Adaptive Planning that reflect the ones maintained in a financial system of record such as Workday?

- A. Select the box 'For reporting purposes only' within Level Details on the alternate parent rollup.
- B. Use level dimensions or level attributes to represent the alternate hierarchy structure.
- C. Suggest a change in the system of record to only have one single structure matching the Adaptive

Planning one.

D. Include the existing levels within a new level rollup that includes 'Alternate' in the name and code.

Answer: B

Explanation:

Workday Adaptive Planning supports alternate reporting hierarchies through the use of level dimensions and level attributes, which allow users to tag and classify levels according to groupings that exist in external systems of record such as Workday HCM or Workday Financial Management. This approach preserves the primary level hierarchy while enabling reporting along alternate dimensional structures without restructuring the core model. Level dimensions enable slice-and-dice reporting across dimensions that cross-cut the standard hierarchy, while level attributes allow metadata tagging of individual levels for grouping in reports and dashboards. Neither modifying the system of record nor creating parallel rollup structures represents a maintainable or scalable solution. The 'For reporting purposes only' checkbox applies to specific use cases but does not comprehensively support alternate hierarchy reporting across the model. Level dimensions and attributes are the recognized, official design pattern for multi-hierarchy reporting in Adaptive Planning. Reference: Workday Adaptive Planning — Level Attributes, Level Dimensions, Alternate Hierarchies, Reporting Configuration.

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