

Overview

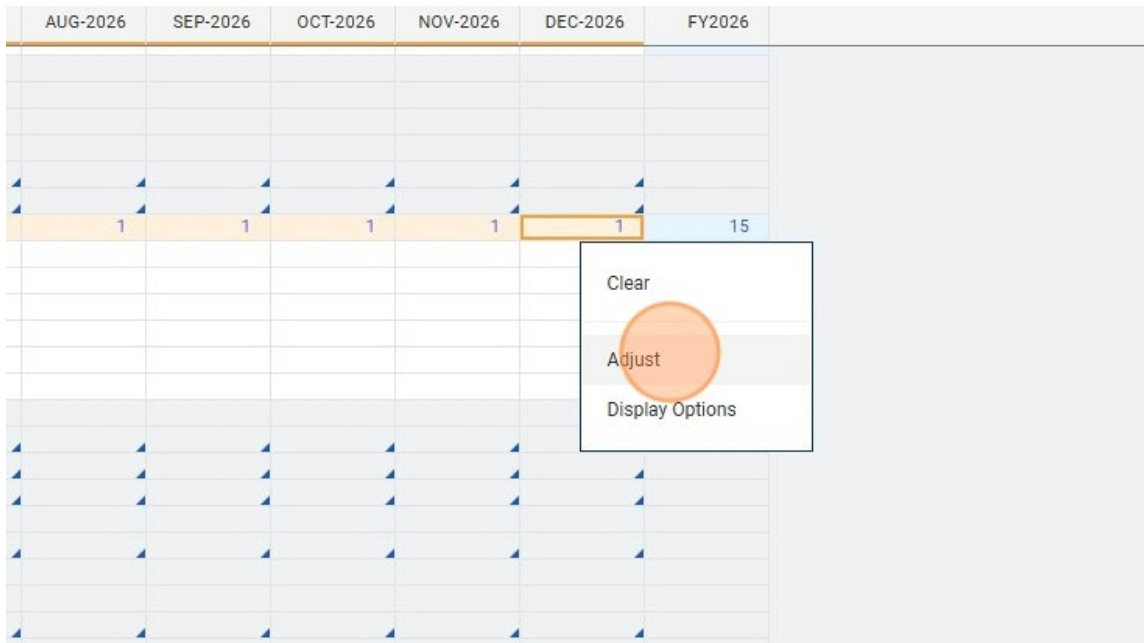
This guide provides an overview of advanced data entry tools available in the Workday Adaptive Budget Input Sheet and Personnel Sheet. It explains how to use key input functions to streamline data entry and improve accuracy, including how to adjust existing values, copy data across time periods or accounts, and adding notes to cells or reports for additional context.

Data Entry Method	Description
Adjust	Allows you to increase or decrease selected values by a specific amount or percentage.
Copy Forward	Copies data from the current month to all future months within the same row, saving time on repetitive entries.
Copy Downward	Copies data from one cell downwards across multiple accounts or line items in the same column.
Add Notes to Cells in Sheets	Allows you to attach notes or explanations directly to individual cells for tracking changes or clarification.
Add Notes to Cells in Reports	Allows you to attach notes or explanations into reports directly to share commentary or clarification.

Instructions

Using the Adjust function to enter data

1. When selecting one or multiple cells, right-click to open the selection menu. Clicking **Adjust** will open the adjustment menu.



2. Within the adjust menu, there are multiple adjustment options. The ***Distribute Adjustment Proportionally*** option allows you to distribute the entered adjustment proportionally based on existing values.

Adjust

Increase or decrease the overall value of a range of cells. Adjusting replaces formulas.

Distribute adjustment proportionally

Enter Value

Distribute adjustment evenly

Enter Value

Apply adjustment individually

Increase ▼ Enter Value Value ▼

3. The ***Distribute Adjustment Evenly*** option allows users to distribute the entered adjustment evenly across the selected period.

Adjust

Increase or decrease the overall value of a range of cells. Adjusting replaces formulas.

Distribute adjustment proportionally

Enter Value

Distribute adjustment evenly

Enter Value

Apply adjustment individually

Increase ▼ Enter Value Value ▼

OK Cancel

4. The **Apply Adjustment Individually** option allows you to adjust values by increasing or decreasing the selected cell(s) by a specific value or percentage.

Adjust

Distribute adjustment proportionally

Enter Value

Distribute adjustment evenly

Enter Value

Apply adjustment individually

Increase ▾ Enter Value Value ▾

OK Cancel

5. You can choose to increase or decrease the cell(s) by clicking on the dropdown menu on the left

Apply adjustment individually

Increase ▾ Enter Value Value ▾

Increase
Decrease

OK Cancel

6. The adjustment value can be entered in the center cell

Apply adjustment individually

Decrease ▾ Enter Value Value ▾

- You can then select if you'd like to increase or decrease the selected cells by the value or use the value as a percentage using the final dropdown menu.

Apply adjustment individually

Decrease ▼ 10 Value ▼
Value
Percent (%)

- Clicking **OK** updates the selected cells with the selected adjustments.

Adjust

Increase or decrease the overall value of a range of cells. Adjusting replaces formulas.

Distribute adjustment proportionally
15000

Distribute adjustment evenly
Enter Value

Apply adjustment individually

Increase ▼ Enter Value Value ▼

OK Cancel

- The selected cells will automatically update themselves.

JAN-2026	FEB-2026	MAR-2026	APR-2026	MAY-2026	JUN-2026	JUL-2026	AUG-2026	SEP-2026	OCT-2026	NOV-2026	DEC-2026
1,001	1,001	2,002	2,002	2,002	1,001	1,001	1,001	1,001	1,001	1,001	1,001

Using the copy forward function

1. Right-click the cell(s) you'd like to copy forward

Budget Input Sheet

Levels: CC01020 Art & Industry Food

#	ACCOUNTS BY TIME	JAN-2026	FEB-2026	MAR-2026	APR-2026	MAY-2026	JUN-2026
65	▼ Total Expenses						
66	▼ Cost of Sales						
67	▼ Food & Beverage Cost of Sales						
68	▼ Food Cost of Sales						
69	Food & Beverage						
70	Ice Cream						
71	Client Food	10,000					
72	Damaged Spoiled Food						
73	Employee Dining						
74	Food Rebates						
75	Freight Charges - Food						
76	Meat						
77	Produce						
78	▼ Alcoholic Beverage Cost of Sales						
79	Beer						
80	Liquor						
81	Wine						
82	▼ Vending Cost of Sales						
83	Vending						
84	▼ Merchandise Cost of Sales						

2. Under the *Copy Forward* option, you can use the **Copy to End** option to copy the value all the way across to the right or open the **Advanced** menu to option additional copy forward options.

Levels: CC01020 Art & Industry Food

#	ACCOUNTS BY TIME	JAN-2026	FEB-2026	MAR-2026	APR-2026	MAY-2026
165	▼ Total Expenses					
166	▼ Cost of Sales					
167	▼ Food & Beverage Cost of Sales					
168	▼ Food Cost of Sales					
169	Food & Beverage					
170	Ice Cream					
171	Client Food	10,000				
172	Damaged Spoiled Food					
173	Employee Dining					
174	Food Rebates					
175	Freight Charges - Food					
176	Meat					
177	Produce					
178	▼ Alcoholic Beverage Cost of Sales					
179	Beer					
180	Liquor					
181	Wine					
182	▼ Vending Cost of Sales					
183	Vending					
184	▼ Merchandise Cost of Sales					
185	▼ General Merchandise Cost of Sales					
186	General Merchandise					

3. Within the menu, you can change whether the value copies through the end (of the year), throughout the entire year, or the quarter.

Copy Forward

Value
10000

Copy through
End
Year
Quarter

Stop at zero

OK Cancel

4. *Copy Options* allows you to change the value being copied to increase or decrease by a percentage or amount each consecutive month.

Copy Forward

Value
10000

Copy through
Year

Copy Options
No Chan... Enter Value Value

Stop at zero

OK Cancel

- Clicking **OK** will save the changes made and apply it to the appropriate cells.

Copy Forward

Value

Copy through

Copy Options

Stop at zero

Using the copy downward function

- Right-click the cell(s) you'd like to copy downward

Budget Input Sheet

Levels: CC01020 Art & Industry Food

#	ACCOUNTS BY TIME	JAN-2026	FEB-2026	MAR-2026	APR-2026	MAY-2026	JUN-2026
65	Total Expenses						
66	Cost of Sales						
67	Food & Beverage Cost of Sales						
68	Food Cost of Sales						
69	Food & Beverage						
70	Ice Cream						
71	Client Food	10,000					
72	Damaged Spoiled Food						
73	Employee Dining						
74	Food Rebates						
75	Freight Charges - Food						
76	Meat						
77	Produce						
78	Alcoholic Beverage Cost of Sales						
79	Beer						
80	Liquor						
81	Wine						
82	Vending Cost of Sales						
83	Vending						
84	Merchandise Cost of Sales						

- Under the *Copy Downward* option, you can use the **Copy to End** option to automatically copy the value all the way down to the bottom of the selected cells or the sheet.

Levels: CC01020 Art & Industry Food

#	ACCOUNTS BY TIME	JAN-2026	FEB-2026	MAR-2026	APR-2026	MAY-2026	JUN-2026	JUL-2026	AUG-2026
165	Total Expenses								
166	Cost of Sales								
167	Food & Beverage Cost of Sales								
168	Food Cost of Sales								
169	Food & Beverage								
170	Ice Cream								
171	Client Food	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000
172	Damaged Spoiled Food								
173	Employee Dining								
174	Food Rebates								
175	Freight Charges - Food								
176	Meat								
177	Produce								
178	Alcoholic Beverage Cost of Sales								
179	Beer								
180	Liquor								
181	Wine								
182	Vending Cost of Sales								
183	Vending								
184	Merchandise Cost of Sales								
185	General Merchandise Cost of Sales								
186	General Merchandise								
187	Souvenirs & Gifts								
188	Native American Handicraft								
189	DYNW Products								

Context menu options: Clear, Copy Forward, Copy Downward, Adjust, Add Note, Explore Cell, Display Options. A sub-menu for Copy Downward is open, showing 'Copy To E...'.

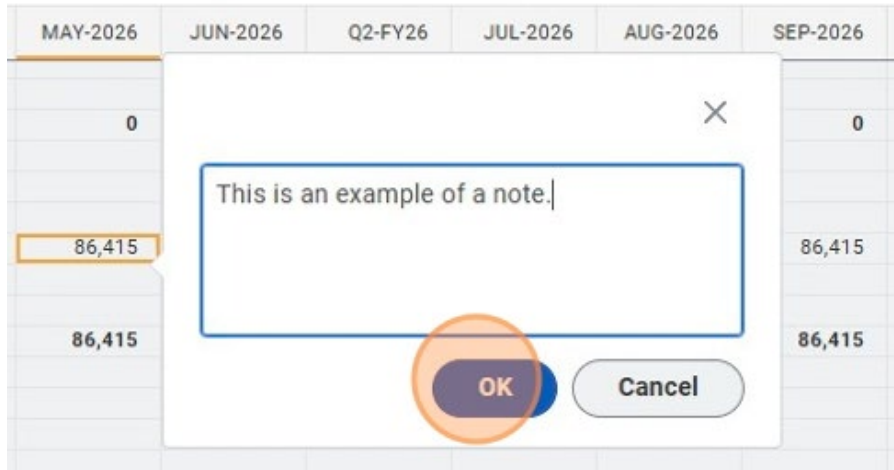
Adding notes to cells in sheets

- After right-clicking the cell/figure that you'd like to add a note to, selecting **Add Note** will bring up the note menu.

86,415	86,415	86,415	259,245
86,415	86,415	86,415	259,245

Context menu options: Add Note, Explore Cell, Display Options. The 'Add Note' option is highlighted.

2. In the note menu you can add/edit notes and click **OK** to save it to the cell.

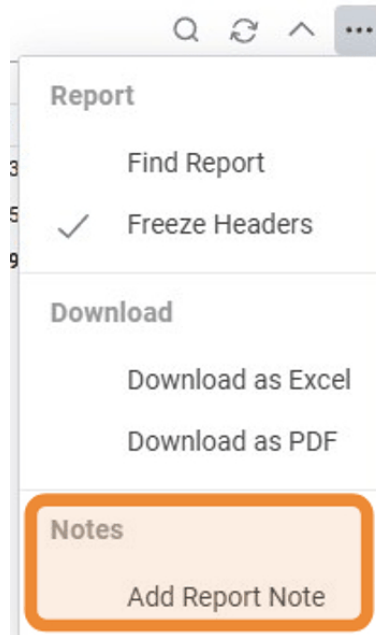


3. Cells with notes will show an orange triangle in the top right-hand corner. You can then hover your cursor over the cell to show the note(s) attached to it.

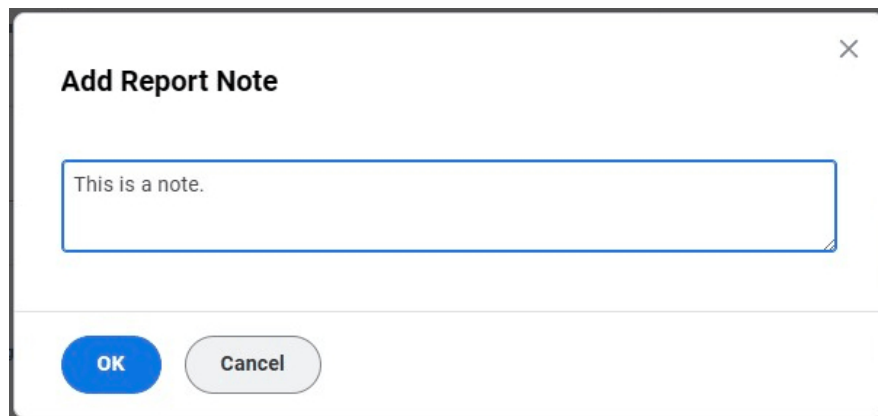
APR-2026	MAY-2026	JUN-2026
0	0	0
86,415	86,415	86,415

Adding notes to cells in reports

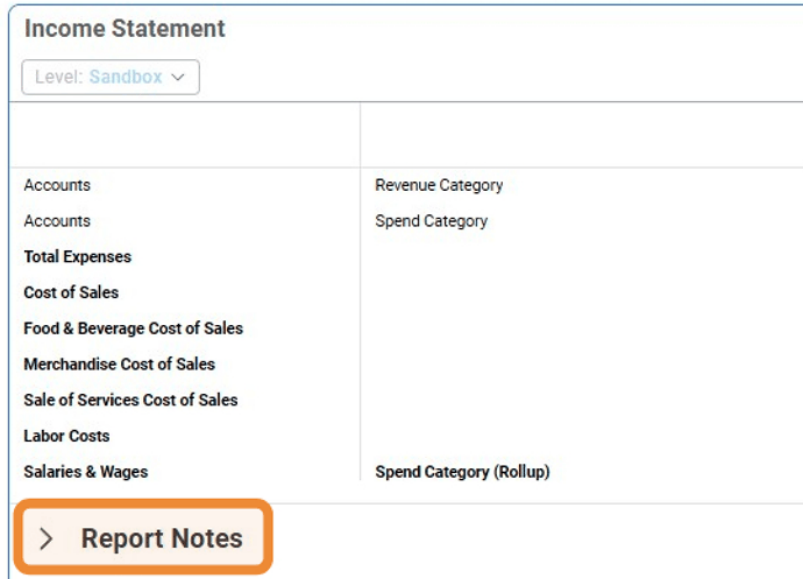
1. Open the report menu by clicking the ellipses (...) in the top right-hand corner of the report. Under the notes section, click “Add Report Note” to add a report to the note.



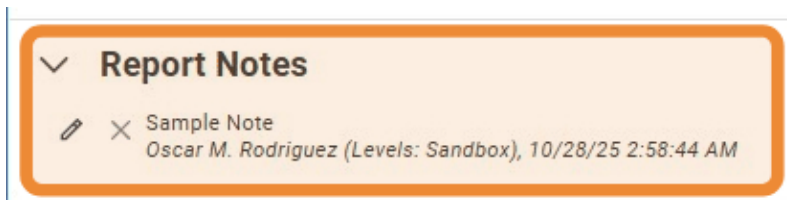
2. Enter your note in the text entry field and click **OK** to save it to the report.

A screenshot of a dialog box titled "Add Report Note". The dialog box has a close button (X) in the top right corner. It contains a text entry field with the placeholder text "This is a note.". At the bottom of the dialog box, there are two buttons: "OK" (a blue button) and "Cancel" (a grey button).

3. Report notes can be viewed at the bottom left hand corner of the corner. If the Report Notes are collapsed, they can be expanded by clicking the > icon



4. Each Report note can be edited by clicking on the pencil icon or deleted by clicking the X icon. Reports can have multiple notes, and will show the note author and the date/time that the note was made.



Support Information

Need help? Contact workday@guestservices.com or visit our Workday Adaptive resources page gsiemployees.com/workday-adaptive for additional guides and instructions.