



Quick Start Guide

BUDGETING IN WORKDAY USING ADAPTIVE PLANNING

Budgeting basics made simple



TERMINOLOGY

Finance Terminology

TERM	DEFINITION
Baseline Budget	The starting point for each cost center's budget, composed of nine months of actual current-year data (January–September) and three months of the current-year budget (October–December).
Capital Expenditures (CapEx)	Funds used to purchase or upgrade assets such as equipment or property. Capital expenditures are developed through a separate planning process outside of Adaptive.
Controllable Expenses	Expenses that managers can directly influence or adjust (e.g., supplies, travel, utilities).
Cost of Goods Sold (COGS)	The direct costs associated with producing goods or services. In Adaptive, these amounts are calculated automatically based on the percentage entered for each account and the budgeted revenue.
Depreciation Expense	The allocation of the cost of an asset over its useful life. Depreciation budgets are maintained by GSI Corporate Finance and automatically reflected in Adaptive.
Direct Payroll	Wages and salaries for regular staff directly assigned to the cost center. This category can be adjusted by managers to reflect staffing or wage changes.
Non-Controllable Expenses	Expenses maintained by GSI Corporate Finance that cannot be edited by managers (e.g., depreciation, insurance, overhead allocations).
Related Payroll Expenses	Payroll-related costs such as taxes, insurance, and benefits. These are either automatically calculated or maintained by GSI Corporate Finance.
Roll-Up	The process by which individual account lines or cost centers are grouped into higher-level categories or totals within reports and summaries. Roll-ups help visualize how detailed data contributes to overall results.

Adaptive Terminology

TERM	DEFINITION
Accounts	The chart of accounts used to classify revenue, expenses and other finance categories. In Adaptive, accounts are organized by hierarchy under major groupings (e.g. Revenue, Cost of Goods Sold, and Payroll).
Budget Input Sheet	This is the primary worksheet in Adaptive where users enter, review, and adjust their cost center budgets. Adjustments made here automatically flow to the Income Statement.
Dimensions	Categories that define how data can be viewed and or analyzed, such as Accounts, Time or Level. Dimensions allow you to filter or group data from multiple perspectives
Filter & Display Options	Tools that allow you to control what data is shown and how.
Income Statement	A read-only report that displays summarized budget data for each cost center. It updates automatically when changes are made and saved in the Budget Input Sheet or Personnel Input Sheet.
Levels	The hierarchy of cost centers in Adaptive. Each cost center is represented as a level, and multiple cost centers roll up into higher-level cost center hierarchies. This allows users to view data at both individual cost center and rolled-up location levels.
Personnel Tab	A sheet in Adaptive that is used to view or update employee-level details such as pay rate, hours, and estimated increases. Changes here flow automatically into the budget.
Report	A view in Adaptive that displays summarized budget data (e.g. Income Statement) in an easy-to-read format.
Sheet	A workspace in Adaptive where users view or edit data (e.g., Budget Input Sheet, Personnel Sheet). Sheets are where all the primary budget planning is done.
Workday Adaptive (Adaptive)	The online budgeting and forecasting system that is used to prepare, review, and manage budgets.

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GENERAL INFORMATION

This guide will assist Budget Managers in preparing their 2026 budget using the Workday Adaptive Planning system (Adaptive). Beginning with the 2026 cycle, we have transitioned from PeopleSoft to Workday Adaptive, and all budgets going forward will be prepared and managed within Adaptive. There will be **2** rounds of budgets this year. **Please ensure that each Budget Manager puts their best and final projections in the first budget round.**

Unlike PeopleSoft, Adaptive is an online, self-contained platform. This means that there will not be any excel templates distributed for budget or payroll. All budgeting activity, including data entry and reporting, should be done directly within the system.

BASELINE BUDGET

The Baseline Budget represents the starting point for the 2026 budget process. **For each cost center, the baseline budget will be available in Adaptive on Wednesday October 29th, 2025** and can be viewed on the Income Statement. It consists of nine months of actuals from 2025 (January through September) and three months of budget from 2025 (October through December). This combination will provide a consistent foundation from which you can make adjustments for 2026.

ACCESSING WORKDAY ADAPTIVE

Adaptive is the system where all budgeting activity will be prepared, entered, and reviewed. You can access Adaptive at <https://login.adaptiveinsights.com/app>. Within the system, budget managers will use the primary dashboard to enter data, review summaries, and verify that adjustments are reflected correctly.

For the 2026 budget cycle, first-time users will be able to log in with their Guest Services e-mail address (e.g., John.Doe@guestservices.com) and the default password **Adaptive123***. When logging in for the first time, the system will automatically prompt you to change your password before continuing.

Data will be saved directly in the system, with updates visible to users in real time, to ensure consistency and assist with collaboration.

For questions or technical support, contact Guest Services Workday Support at workday@guestservices.com.

BUDGET CATEGORIES AND ADJUSTMENT RULES

In Workday Adaptive, all adjustments are made through the **Budget Input Sheet**. This sheet is organized with spend categories that represent the major components of the budget. Some spend categories allow dollar adjustments, while others can be updated based on percentage inputs.

Category

- | | |
|---|--|
| 1. Revenue | Any revenue account can be adjusted |
| 2. Cost of Goods Sold | COGS can be adjusted using revenue-based percentages |
| 3. Direct Payroll | Any Direct Payroll account can be adjusted |
| 4. Controllable Expenses | Any controllable Expense can be adjusted |
| 5. Related Payroll adjustment | Related Payroll Expense accounts cannot be adjusted |
| 6. Non-Controllable Expenses | Non-Controllable accounts cannot be adjusted |

REVENUE

All Revenue accounts in your 2026 Budget can be adjusted. The revenue amounts in your 2026 Baseline Budget were derived from nine months of 2025 actuals, from January through September, and your 2025 budget amounts from October through December.

If you are aware of any unusual Revenue trends or variations in 2025, you should take these into account when adjusting your 2026 Revenue budget.

Cost centers with reimbursable costs are not required to calculate this line item or enter an amount in the Budget Input Sheet. Adaptive will automatically calculate the values each time other line items in the budget are adjustment.

COST OF GOODS SOLD (COGS)

Some of the Cost of Goods Sold accounts in your 2026 budget can be adjusted using percentage inputs. The base Cost of Goods sold amounts in your 2026 Budget will be linked to percentage values that update automatically based on the revenue entered for the corresponding spend category.

Controllable expenses that roll up within Cost of Goods Sold can be adjusted as needed. These adjustments should reflect expected operational changes or known variations in product or service costs. Historical data from prior years should be reviewed to validate assumptions and maintain accuracy.

Reimbursable cost centers must budget all revenue except for the Reimbursable Costs line item. In the event that a set dollar amount is needed, the “Client Food” spend category can be used.

DIRECT PAYROLL

All Direct Payroll accounts in your 2026 budget can be adjusted via the Personnel Tab in Adaptive. The Direct Payroll amounts in your 2026 Baseline Budget were derived from nine months of 2025 actuals, from January through September, and your 2025 budget amounts from October through December.

Payroll budgets will be based on the number of workdays in each month, not on the dates when payroll is paid.

Adjustments should also reflect seasonal staffing requirements, wage changes, or other known factors such as holidays or renovations that may cause unusual fluctuations. For seasonal employees, be sure to enter a hire date and termination date that represent their expected period of employment. The system will then automatically calculate payroll only for those activate months. If the start and termination dates are not entered, then Adaptive will automatically spread the payroll amount evenly across all twelve months.

Information for Salaries and Wages, Payroll Taxes, and Employee Benefits is pulled directly from the Personnel section in Adaptive. As changes are made to staffing or pay rates, the system automatically recalculates related expenses and updates the budget accordingly. Benefit information for expected new hires must also be entered into the Personnel sheet and should be reviewed to ensure that all employees in the cost center have consistent benefit figures.

Budgeted overtime premiums are not calculated in the Personnel Sheet. Estimated overtime costs should be entered manually in the Budget Input Sheet under the appropriate overtime premium spend category to ensure they are reflected in total payroll expenses.

CONTROLLABLE EXPENSES

All Controllable Expense accounts in your 2026 Budget can be adjusted. The amounts in the 2026 Baseline Budget were derived from nine months of 2025 actuals, from January through September, and 2025 budget amounts from October through December. Adjustments should reflect operational needs, expected changes, or planned savings for 2026.

RELATED PAYROLL ADJUSTMENT

Related Payroll Expense accounts cannot be adjusted directly in your 2026 Budget. The lines for Related Payroll Expenses (e.g. payroll taxes, group insurance, retirement plans, workers' compensation, and employee meals) must be adjusted on the Personnel sheet. The only exception being Overtime Premium, which must be entered in the Budget Input Sheet.

The 9 months actual plus 3 months budget amounts are derived from prior year actuals and may vary based on statutory tax rates or system-driven calculations. Adaptive automatically

updates these expense lines when changes are made to Direct Payroll in the Personnel sheet or Budget Input Sheet.

NON-CONTROLLABLE EXPENSES

Non-Controllable Expense accounts cannot be adjusted in your 2026 Budget. These include items such as insurance allocations and other centrally maintained costs. Finance updates these accounts outside the cost center entry process, and any changes flow automatically into Adaptive.

The baseline amounts for 2026 were derived from nine months of 2025 actuals, from January through September, and 2025 budget amounts from October through December. These lines are maintained centrally to ensure consistency across the company and should not be modified by managers.

GENERAL OVERHEAD

General Overhead is a centrally managed item and cannot be adjusted in the 2026 Budget. It is calculated as a fixed percentage (3%) of each operating unit's total revenue. This percentage is populated and will apply consistently across all cost centers.

DEPRECIATION EXPENSE AND PROPERTY INSURANCE EXPENSE

Depreciation and property insurance budgets are maintained by Finance. These accounts are reviewed and updated based on factors such as asset expirations, capital expenditure plans, and insurance renewals. Managers do not make adjustments to these lines, as they will be reflected automatically in Adaptive.

CAPITAL EXPENDITURES (EXECUTIVE COMMITTEE MEMBERS ONLY)

A Capital Expenditure Worksheet will be provided to each Division Executive to be used by them to forecast Capital Expenditures for 2026. This component is added to the Budget in order to (a) more effectively plan cash flow needs and (b) to reduce the amount of mid-year scrutiny performed on capital expenditures.

Through this forecast process, the goal is to establish what the capital expenditures requirements are going to be at the beginning of the year. This means that there will be less scrutiny during the year on requested "approved" capital expenditures and far more scrutiny on requested "unapproved" capital expenditures. A small amount of Miscellaneous Capital Expenditures can also be added for each month as needed.

In addition to reviewing the P&L statements every month, all Budget Managers will be evaluated on their over/under Budget Capital Expenditures. This is a very serious matter. Every Manager should carefully consider the necessity and return expectation of each additional

dollar that is invested into the business. A methodology is currently being developed that will measure the Manager's performance based upon the return on investment (profit/assets).

Please return the Capital Expenditure Worksheet by the due date on the 2026 Budget Calendar. This information will assist the Finance Division in determining the Depreciation Expense Budget for each cost center.

STATISTICAL INFORMATION

Statistical information in the Budget Input Sheet helps ensure that key operational metrics are accurately reflected in the 2026 budget. These statistics are entered directly within Adaptive and, in some cases, will calculate automatically based on other data entered into the system.

Statistics vary by the cost center type and include:

Statistic	Description
Room information	For lodging operations, this includes the total number of rooms and the number of rooms sold each month
Lot information	For campgrounds, this includes the total number of lots and the number of lots sold by month
Houseboat information	For marinas that rent houseboats, this includes the total number of houseboats and the number rented each month
Moorage information	For marinas with rented slips, this includes the total number of slips and the number occupied by month

PAYROLL TEMPLATES

In prior years, payroll templates were distributed and used to calculate and allocate labor costs by month. In Workday Adaptive, this process has been replaced by the Personnel sheet.

All payroll-related data, including salaries, wages, payroll taxes, and benefits, is now managed directly in the Personnel Input Sheet. This ensures payroll information flows automatically into the budget and eliminates the need for separate templates.

NEW COST CENTERS

A Baseline Budget will not be created for cost centers that begin operations on or after October 1, 2025. These cost centers will start with a blank Budget Input Sheet in Adaptive.

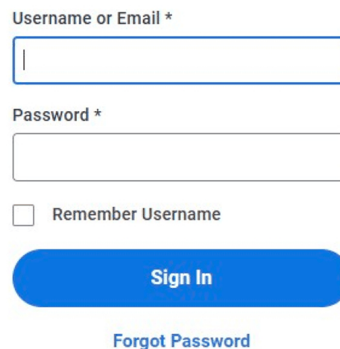
Cost centers that began operations between January 1, 2025 and September 30, 2025 will need to develop the remaining months of the year from a zero base. A Budget Input Sheet will be available in Adaptive for all cost centers.

In both cases, the most recent Contract Pro-Forma should be used as the basis for constructing the 2026 budget. This ensures consistency with what was previously approved by management and submitted to the client.

USING ADAPTIVE: ENTERING, ADJUSTING, AND VIEWING BUDGETS

Logging into Adaptive

1. Navigate to the Workday Adaptive login page (<https://login.adaptiveinsights.com/app>) and enter your login information:
 - Your Guest Services email address will be your username.
 - The default password for Workday Adaptive is **Adaptive123***



Username or Email *

Password *

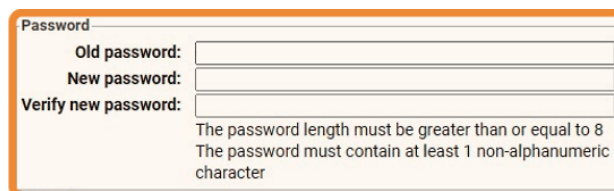
Remember Username

Sign In

Forgot Password

2. When logging in for the first time, the system will automatically prompt you to update your password before continuing.

Note: You will not be able to proceed until you have changed your password.



Password:

Old password:

New password:

Verify new password:

The password length must be greater than or equal to 8
The password must contain at least 1 non-alphanumeric character

3. Once you've updated your password, click **Save** to save the changes.

Personal info

Name:

Position:

Username: sample@guestservices.com

Email: Use username as email
 Enter email

Home page:

Perspective:

Dashboard:

Time zone:

Country:

State:

Password

Old password:

New password:

Verify new password:

The password length must be greater than or equal to 8
The password must contain at least 1 non-alphanumeric character

My avatar

OR

Default avatar

OR

Custom avatar

No file chosen
(Image requirements: JPG, PNG. Your avatar will be resized to 50x50 pixels)

Personal Email Groups

Actions User Group

No user groups exist. Click on the "New Group" button to begin.

- After updating your password, you should be able to click on the **W** in the top left-hand corner of your screen to go to the Adaptive dashboard.

Note: This process is only necessary the first time that you log into Workday Adaptive. Afterwards, logging in will take you directly to the Adaptive dashboard.

Implementation- Guest Services, Inc.

My Profile

Personal info

Name:

Position:

Username: sample@guestservices.com

Email: Use username as email
 Enter email

Home page:

Perspective:

Dashboard:

Time zone:

Country:

State:

Password

Old password:

New password:

Verify new password:

The password length must be greater than or equal to 8
The password must contain at least 1 non-alphanumeric character

My avatar

OR

Default avatar

OR

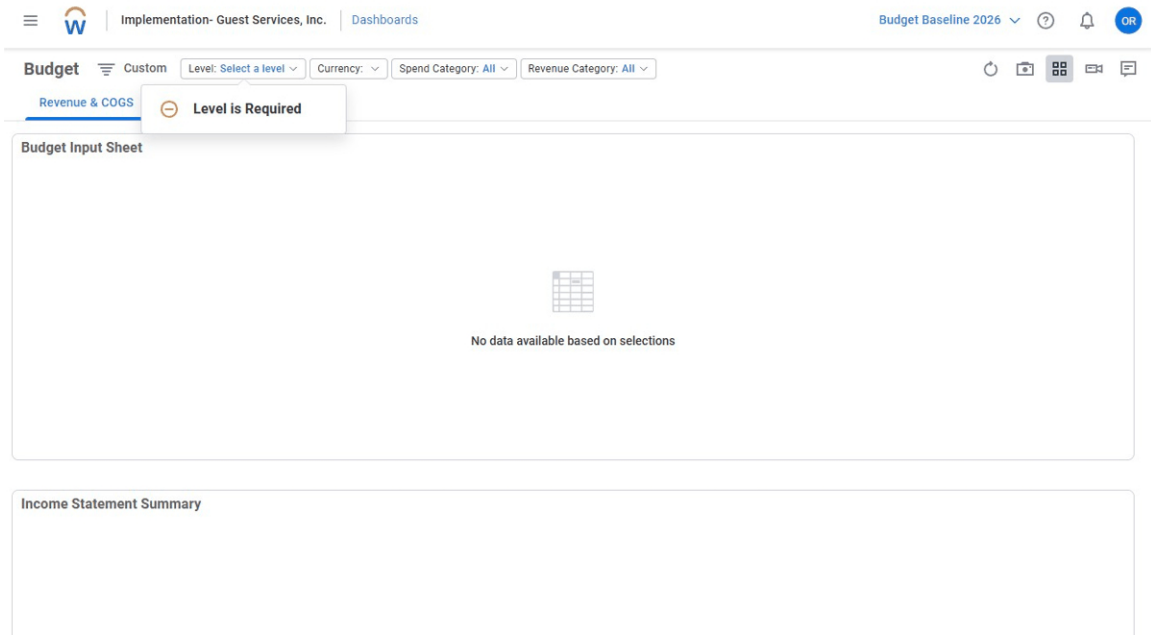
Custom avatar

No file chosen
(Image requirements: JPG, PNG. Your avatar will be resized to 50x50 pixels)

Personal Email Groups

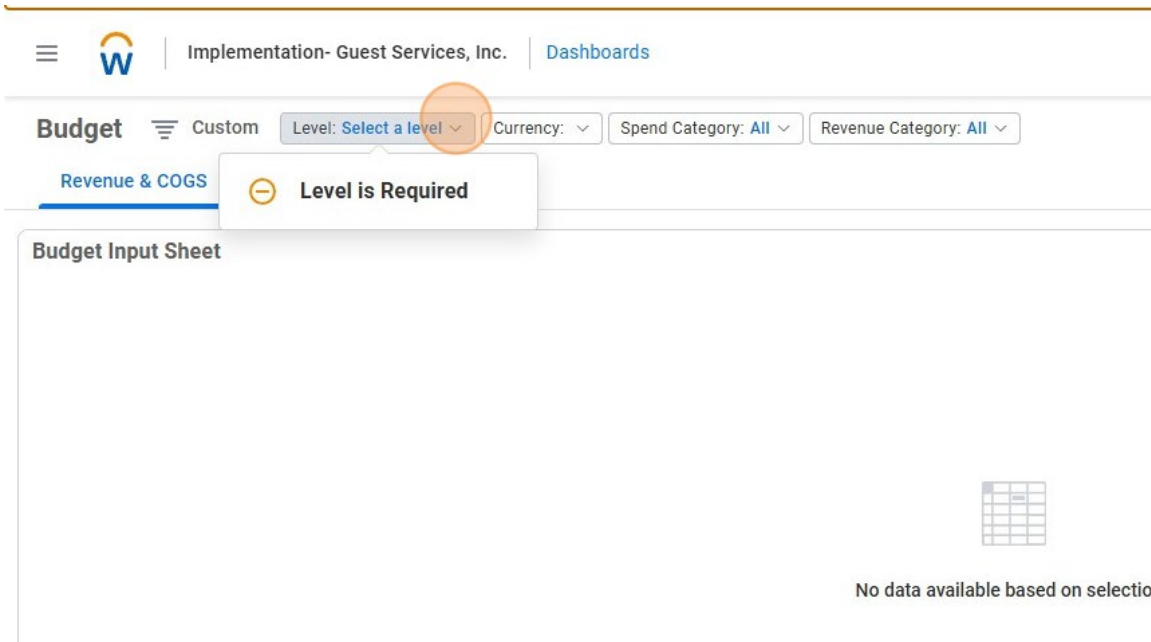
Save

- You should automatically be directed to the Workday Adaptive dashboard and can begin working your budget(s).



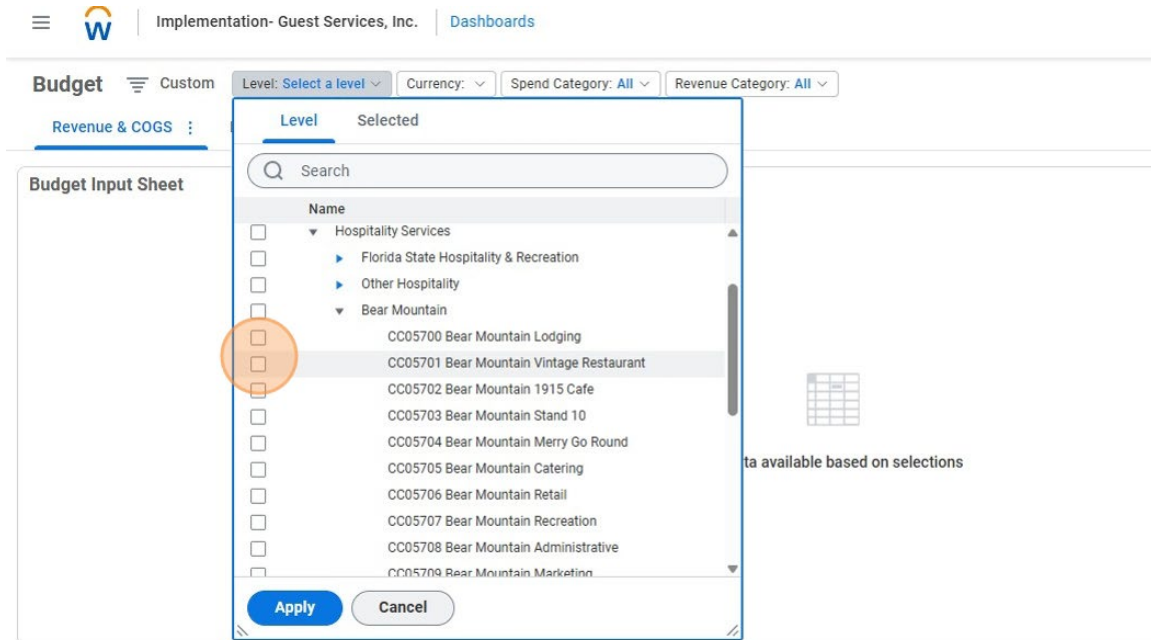
Making changes to your budget in Adaptive

1. After logging into Adaptive, start by selecting the cost center you'd like to make adjustments to by clicking on the "level" dropdown.

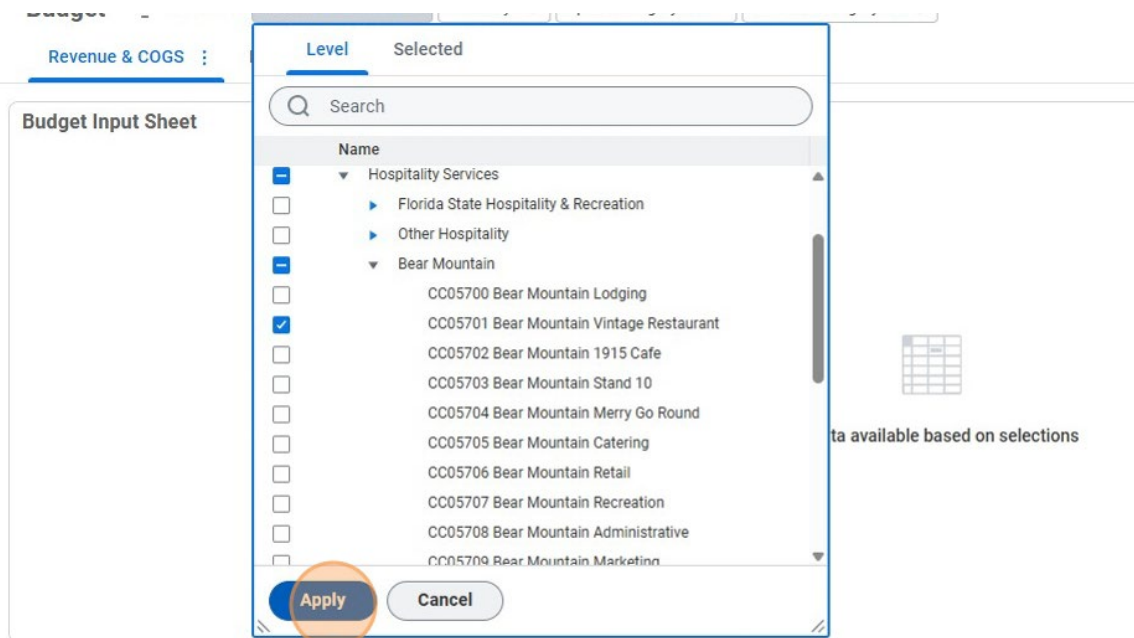


2. Navigate to the cost center you want to make changes to and click on the box next to it to ensure that it is selected.

Note: Selecting a cost center hierarchy will show you information from the cost centers that roll up into it, but you can only make changes to one cost center at a time.

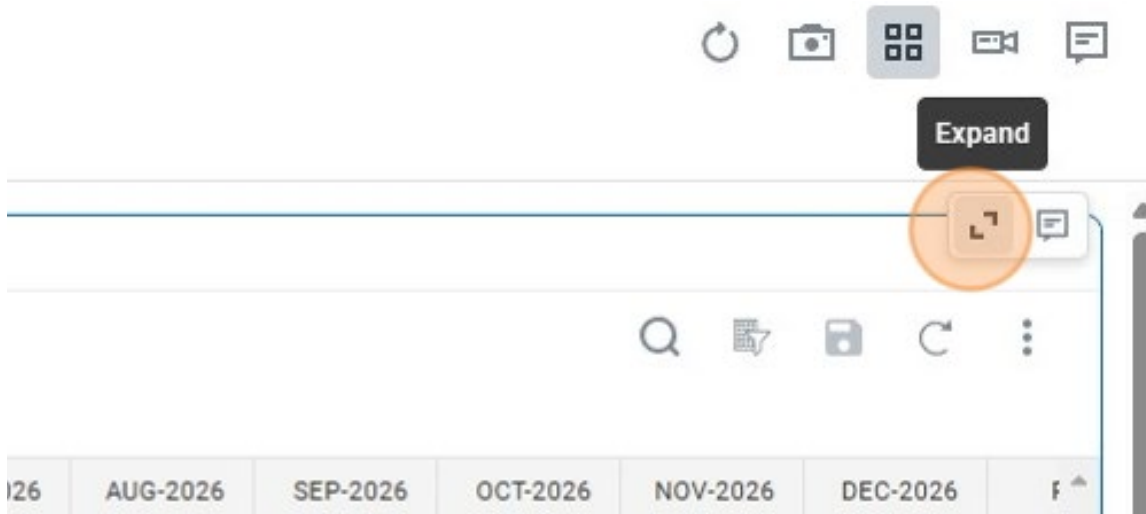


3. Click "Apply" to open the budget sheets for the selected cost center.



NOTE: Both the **Budget Input Sheet** and the **Income Statement** for the cost center(s) will appear.

- The **Budget Input Sheet** is where adjustments will be entered and updated.
 - The **Income Statement** is where the 2026 budget is displayed and will automatically update based on the changes made to the Budget Input Sheet.
4. For easier navigation, it's recommended to expand the **Budget Input Sheet** to view it in full screen by clicking on the *Expand* icon in the top right-hand corner.



5. When viewing the **Budget Input Sheet**, you can click on the ► or ▼ icons to collapse or expand categories in the sheet
6. White cells are open for user input and changes, whereas gray cells locked and cannot be changed.

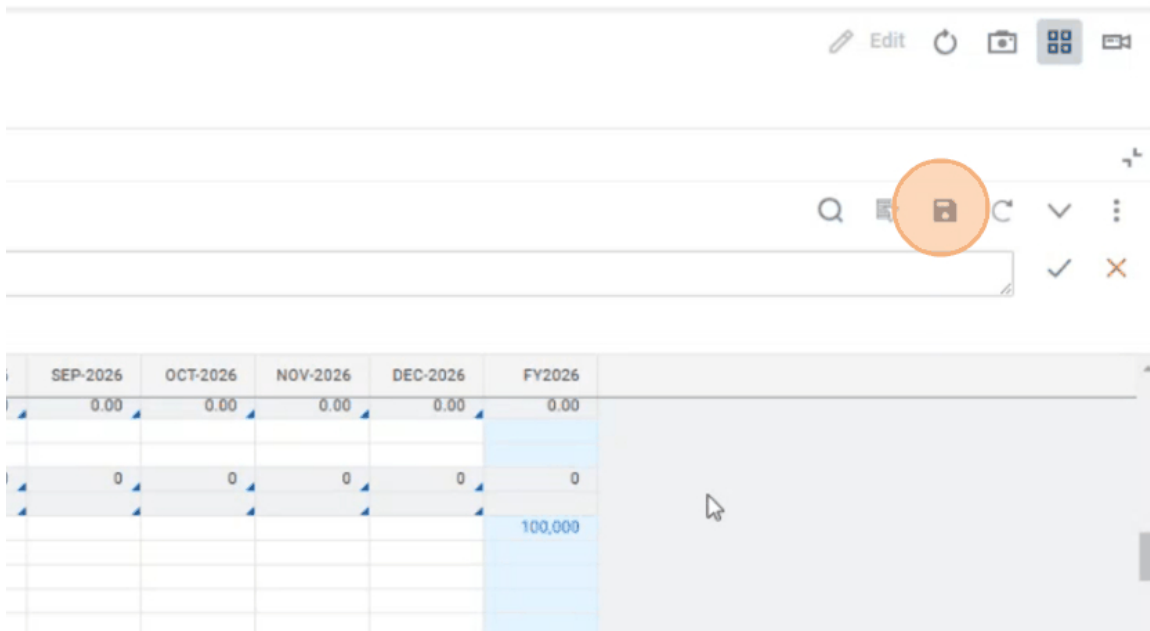
#	ACCOUNTS BY TIME	JAN-2026	FEB-2026	MAR-2026	APR-2026
1	▼ Percentage Inputs				
2	Food & Beverage	35.00%	35.00%	35.00%	35.00%
3	Ice Cream	30.00%	30.00%	30.00%	30.00%
4	Beer	20.00%	20.00%	20.00%	20.00%
5	Liquor	17.00%	17.00%	17.00%	17.00%
6	Wine	15.00%	15.00%	15.00%	15.00%
7	Vending	5.00%	5.00%	5.00%	5.00%
8	DYNW Products	40.00%	40.00%	40.00%	40.00%
9	General Merchandise	38.00%	38.00%	38.00%	38.00%
10	Native American Handicraft	45.00%	45.00%	45.00%	45.00%
11	Souvenirs & Gifts	35.00%	35.00%	35.00%	35.00%
12	Fuel	80.00%	80.00%	80.00%	80.00%
13	Sports Equipment	36.00%	36.00%	36.00%	36.00%
14	Sale of Services Food & Beverage	23.00%	23.00%	23.00%	23.00%
15	▼ Total Revenue				
16	▼ Food & Beverage Revenue				
17	▼ Food Revenue				

- You can click on the cell that you'd like to make changes to and then input the value that you'd like to change it to. The newly input value will appear in blue.

#	ACCOUNTS BY TIME	JAN-2026	FEB-2026	MAR-2026	APR-2026	MAY-2026
16	Food & Beverage Revenue					
17	Food Revenue					
18	Board Plans - Nontaxable					
19	Board Plans - Taxable					
20	Catering No Fee - Nontaxable					
21	Catering No Fee - Taxable					
22	Catering - Nontaxable					
23	Catering - Taxable					
24	Coffee Bar Sales					
25	Food & Beverage	10,000				
26	Food & Beverage - No Fee					
27	Food & Beverage - Nontaxable					

- Unsaved changes in the **Budget Input Sheet** will appear in blue. Click on the *Save* icon in the top right-hand corner to save any changes.

Note: Unsaved changes may be lost if you navigate away or close the sheet.



For more in-depth instructions on data entry, refer to the [Advanced Data Entry QRG](#)

Reviewing data in the income statement

Users should remember that only saved entries in the Budget Input Sheet will be reflected in the Income Statement for review and confirmed that changes were accurately reflected.

Note: The Income Statement in Adaptive has been formatted to resemble the monthly income statement in Workday.

1. When looking at values in the Budget Input Sheet, the revenue/spend category and roll-up account should be reviewed.

Budget Input Sheet		
Levels: CC01010 Lincoln Food		
#	ACCOUNTS BY TIME	JAN-2026
180	▼ Food & Beverage Cost of Sales	
181	▼ Food Cost of Sales	
182	Food & Beverage	3,500
183	Ice Cream	0
184	Client Food	

2. When looking at the Income Statement, the value should be accurately reflected.

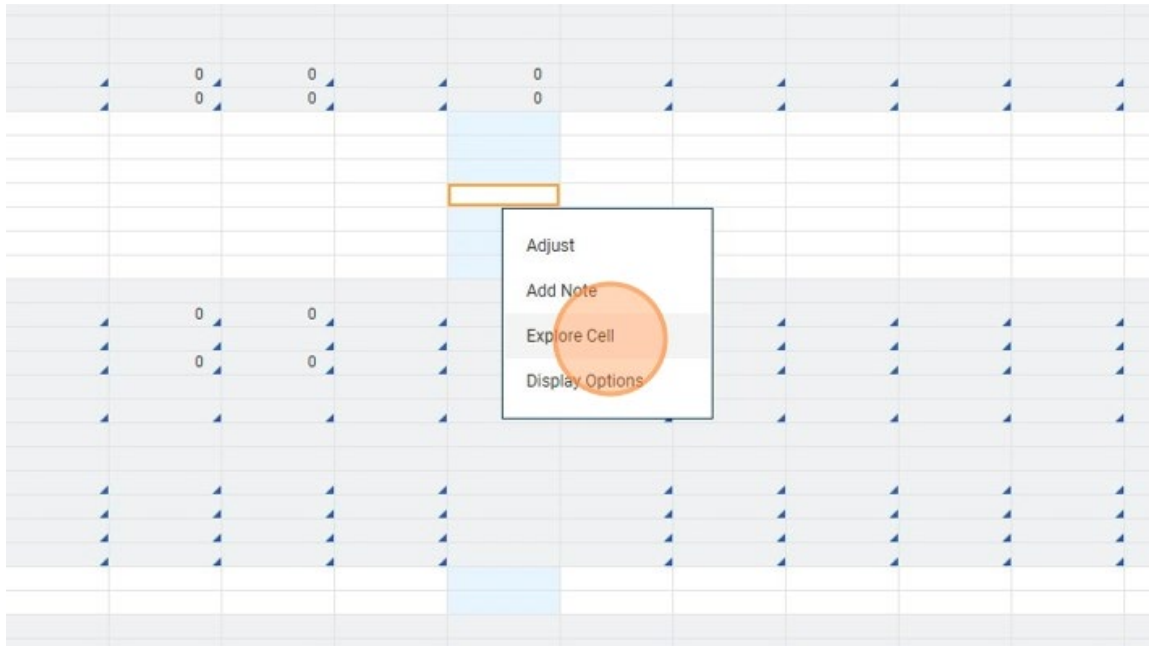
Income Statement		
Level: CC01010 Lincoln Food		
		Jan-2026
Food Cost of Sales	Spend Category (Rollup)	
	Damaged/Spoiled Food	0
	Food & Beverage	3,500
	Food Rebates	0
	Ice Cream	0
	Total Spend Category (Rollup)	3,500

For more in-depth instructions on reviewing data in Adaptive, refer to the [Customizing Data Views and Search QRG](#)

Exploring Cells to View Roll Ups

The Explore Cell feature allows users to see how individual accounts or categories roll up into higher-level accounts. This helps confirm where the numbers are coming from and how they contribute to the overall budget.

1. This can be done by right clicking any cell and selecting **Explore Cell**



2. This opens a new pop up that shows the *Rollup Type*, which shows how the value affects the category it rolls into and what the value *Rolls up to* show the affected category group.

Explore Cell

Empty

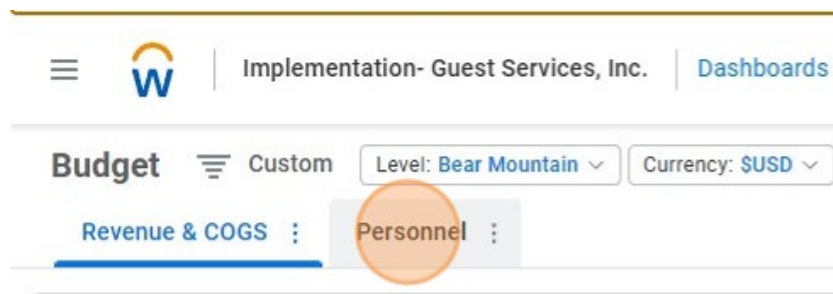
Visible on following sheets:
Budget Input Sheet

Account	Food Rebates
Code	BIS.Exp_Food_Rebates
Type	Cube
Rollup type	Sum
Rolls up to	Food Cost of Sales
Level	CC01020 Art & Industry Food
Year	FY2025

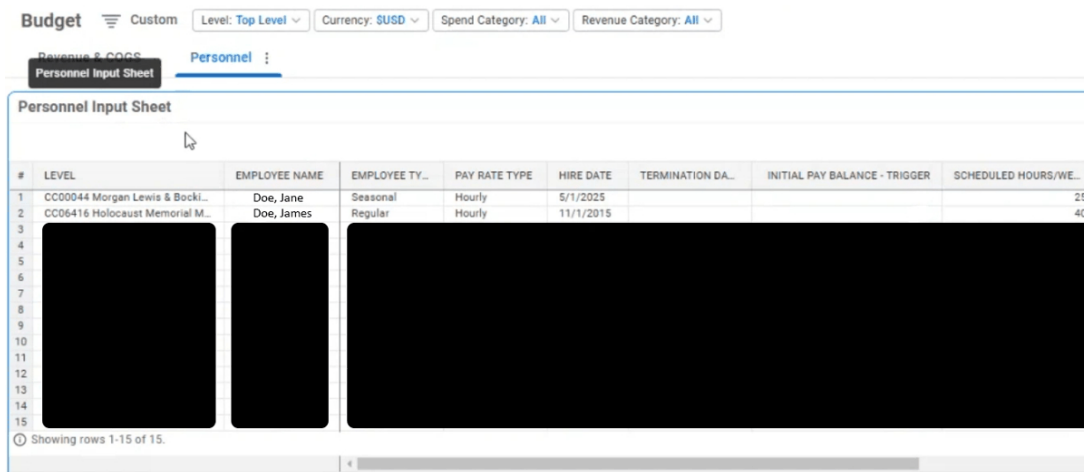
Updating Personnel

The Personnel Tab controls the labor costs that flow into the budget input sheet, including salaries and wages, payroll taxes, and employee benefits. The Personnel Input Sheet provides detailed information such as cost center, name, employment type (regular, seasonal, or wages only), pay rate type (hourly or salaried), scheduled hours, estimated annual increases, and more for each employee. This information determines your payroll data and ensures that labor costs are captured accurately in the budget.

1. You can switch to the Personnel section by clicking on the **Personnel** tab in the top left-hand corner of your dashboard.



2. Here you can view and adjust information for employees in the **Personnel Input Sheet**.

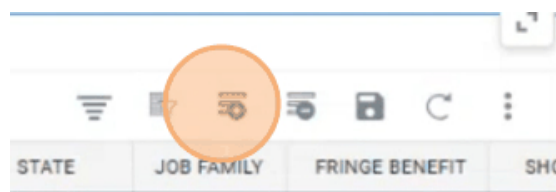


The screenshot shows the 'Personnel Input Sheet' interface. At the top, there are filters for 'Budget', 'Custom', 'Level: Top Level', 'Currency: \$USD', 'Spend Category: All', and 'Revenue Category: All'. Below these filters, there are two tabs: 'Personnel Input Sheet' and 'Personnel'. The 'Personnel Input Sheet' tab is active. The table below has the following columns: #, LEVEL, EMPLOYEE NAME, EMPLOYEE TY..., PAY RATE TYPE, HIRE DATE, TERMINATION DA..., INITIAL PAY BALANCE - TRIGGER, and SCHEDULED HOURS/WE... The table contains two rows of data:

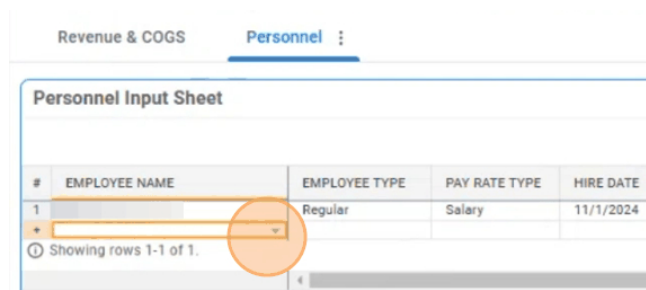
#	LEVEL	EMPLOYEE NAME	EMPLOYEE TY...	PAY RATE TYPE	HIRE DATE	TERMINATION DA...	INITIAL PAY BALANCE - TRIGGER	SCHEDULED HOURS/WE...
1	CC00044 Morgan Lewis & Bockl...	Doe, Jane	Seasonal	Hourly	5/1/2025			25
2	CC06416 Holocaust Memorial M...	Doe, James	Regular	Hourly	11/1/2015			40
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								

At the bottom of the table, it says 'Showing rows 1-15 of 15.'

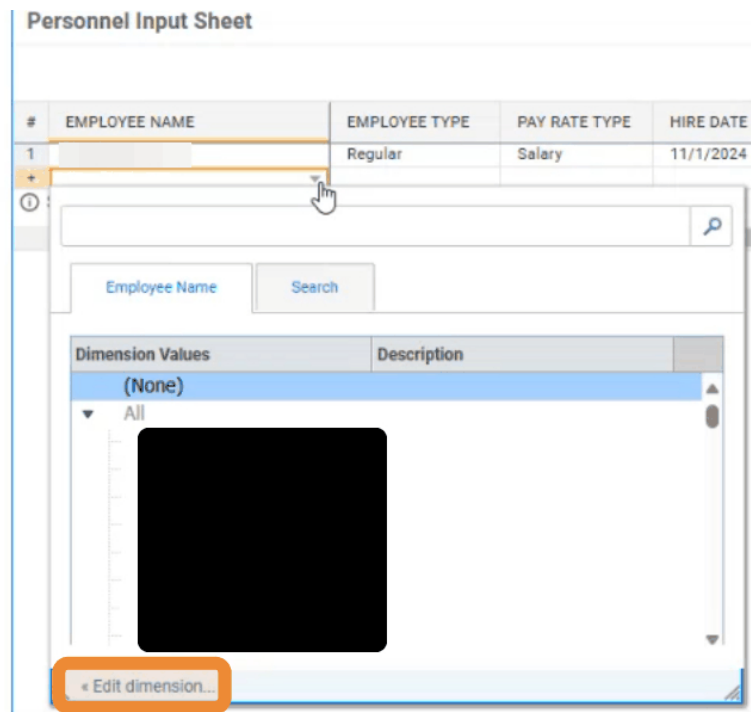
3. A new row can be added to account for seasonal employees or new hires that are expected during 2026, but are not already listed. To do this, click the *Add Row* icon in the top right-hand corner.



- Once the new row is created, you'll need to add an employee name before populating information. Click on the ▼ icon in the *Employee Name* field to open the *Employee Name* menu.

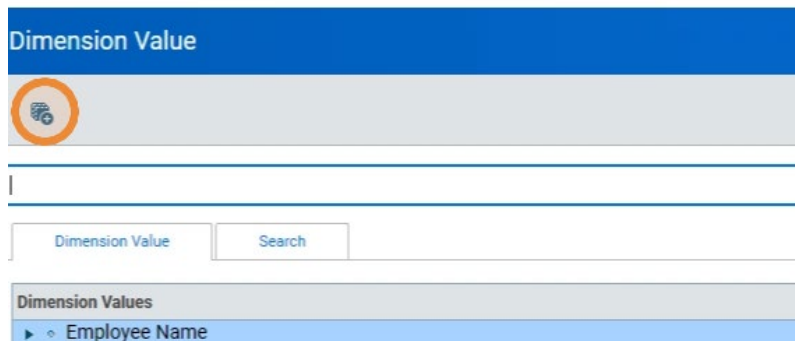


- In the Employee Name menu, click on *Edit Dimension* from the dropdown to open the **Edit Employee Name** menu.

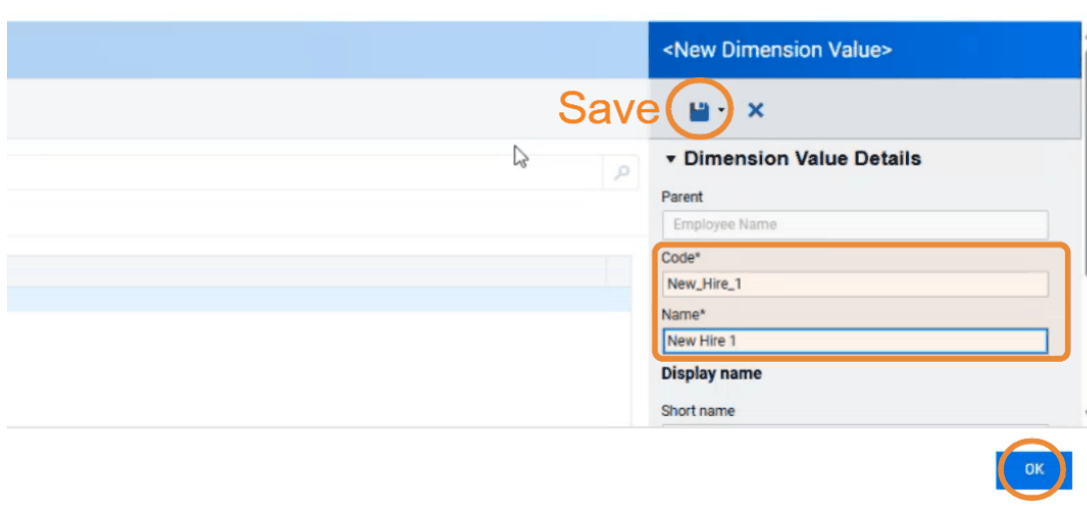


- In the **Edit Employee Name** menu, click on the **Create New Dimension Value** button in the top left-hand corner of the window to create a new employee name.

Edit Employee Name



- On the right-hand side, you will need to add the new employee's name (or a placeholder) in the *Code* and *Name* fields. then click the *Save* button above it, and click *OK* to return to the **Personnel Input Sheet**.



- The new employee will now appear in the **Personnel Input Sheet**. From here you can enter basic personnel details such as their Employee Type, Pay Rate Type, Initial Pay, and Scheduled Hours (Weekly). For seasonal employees, you can also enter tentative hire and termination dates to ensure that the system only calculates wages for the applicable months. Changes will appear in blue.

Note: After adding new hires, scroll horizontally within the Personnel Sheet to review the benefits fields. In order for payroll costs calculate correctly, copy the benefit information from another employee within

the same cost center and paste it into the corresponding benefit fields for the new hires. These benefit values should generally be consistent across employees in the same cost center.

The screenshot shows the 'Budget' interface with the 'Personnel' tab selected. The table below is the main data area:

#	EMPLOYEE NAME	EMPLOYEE TYPE	PAY RATE TYPE	HIRE DATE	TERMINA...	INITIAL PAY BALANCE - TRIGGER	SCHEDULED
1	New Hire 1	Regular	Salary	11/1/2024		50,000	

Showing rows 1-1 of 1.

9. As with budget inputs, unsaved changes appear in blue. Click on the *save* icon in the top right-hand corner to save updates to the sheet. Any changes to the Personnel sheet will also be updated under payroll related spend categories in the Budget Input Sheet.

ADDITIONAL RESOURCES

Quick Reference Guides are available online via <https://gsiemployees.com/workday-adaptive> to provide detailed step-by-step support on specific topics and areas of Workday Adaptive. These guides include:

- Instructions for first-time users on how to access the system and update their login credentials.
- Guidance on advanced features that streamline data entry and simplify making adjustments in the Budget Input Sheet
- How to change display options and use the search function to filter or explore data.
- Instructions for exporting sheets to Excel and using the snapshot function for version tracking and sharing.
- Additional job aids, videos, and references covering other features in Workday Adaptive.

For questions or help with technical issues related to Workday, please contact workday@guestservices.com. The support team can assist with system access, troubleshooting, and help provide guidance on budget setup and navigation.