Overview

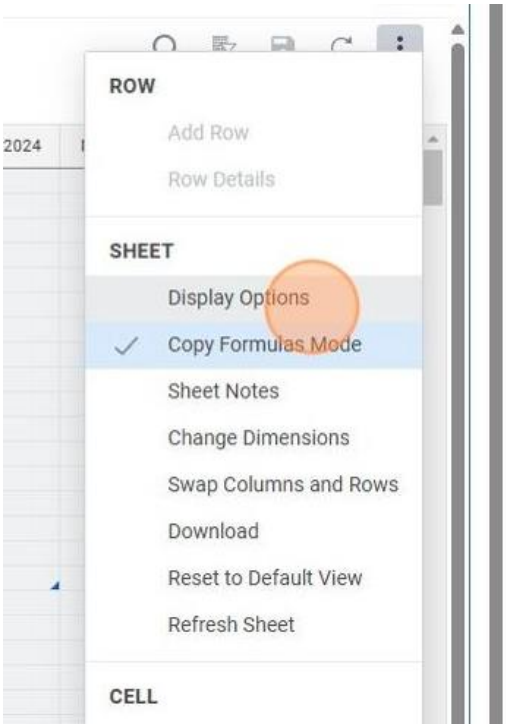
This guide explains the different ways users can customize how data is displayed in Workday Adaptive. It covers how to adjust display options to view different time periods, change dimensions to see data from various perspectives, and use the search function to quickly locate specific spend or revenue categories.

Data Entry Method	Description
Adjusting Display Options	Adjusts which months or years of data are shown on the Budget Input Sheet or Income Statement Summary.
Changing Dimensions	Modifies how data is grouped or displayed in the Income Statement Summary.
Search Function	Assists with quickly locating specific spend or revenue categories within a sheet.

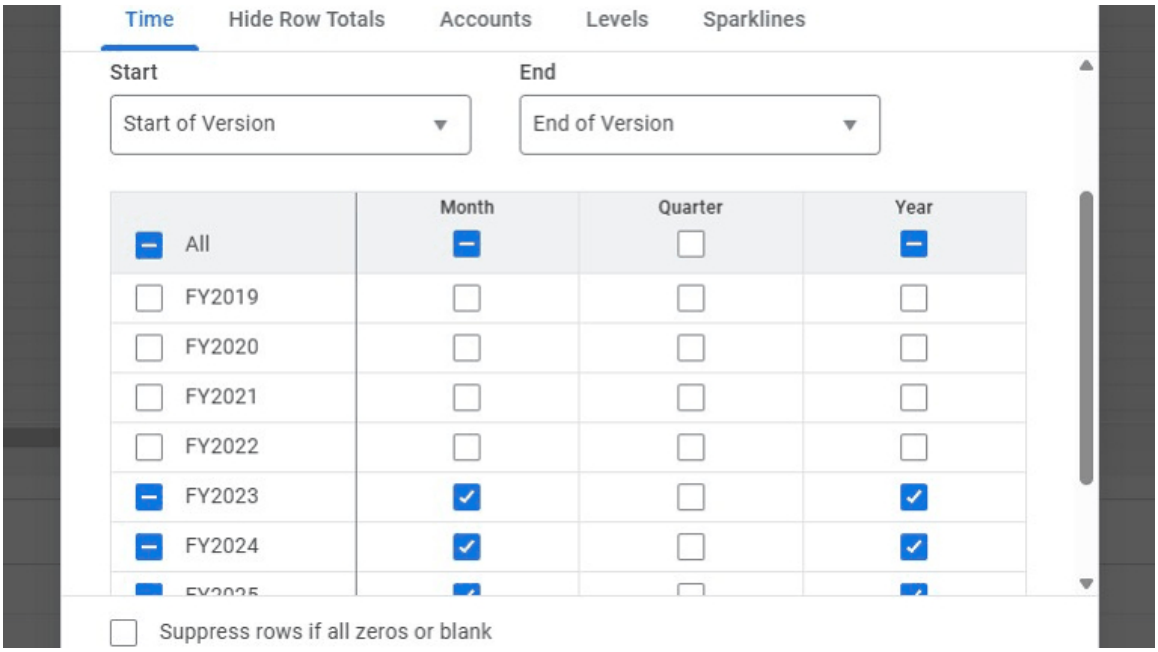
Instructions

Adjusting Display Options

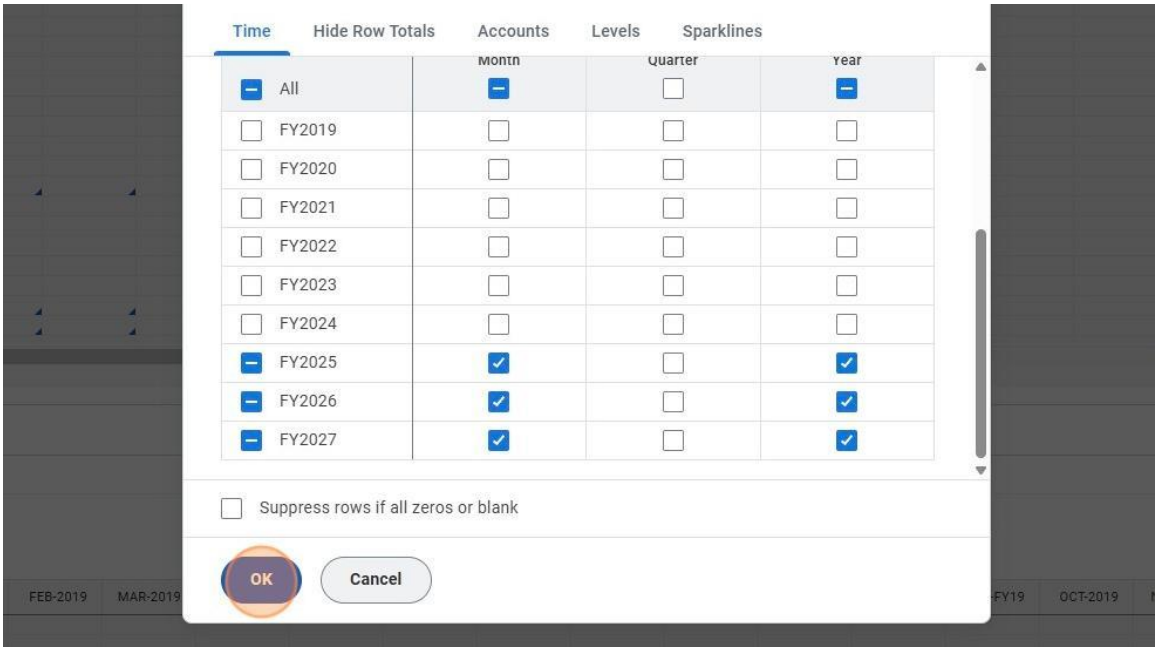
1. Opening the sheet menu on the top right-hand corner of the sheet and clicking on **Display Options** will open the Display Options Menu.



2. You can check or uncheck years on the left-hand side that you want to add or remove. You can also select how the data is broken down (e.g., month, quarter or year) allowing you to compare results across different time periods.

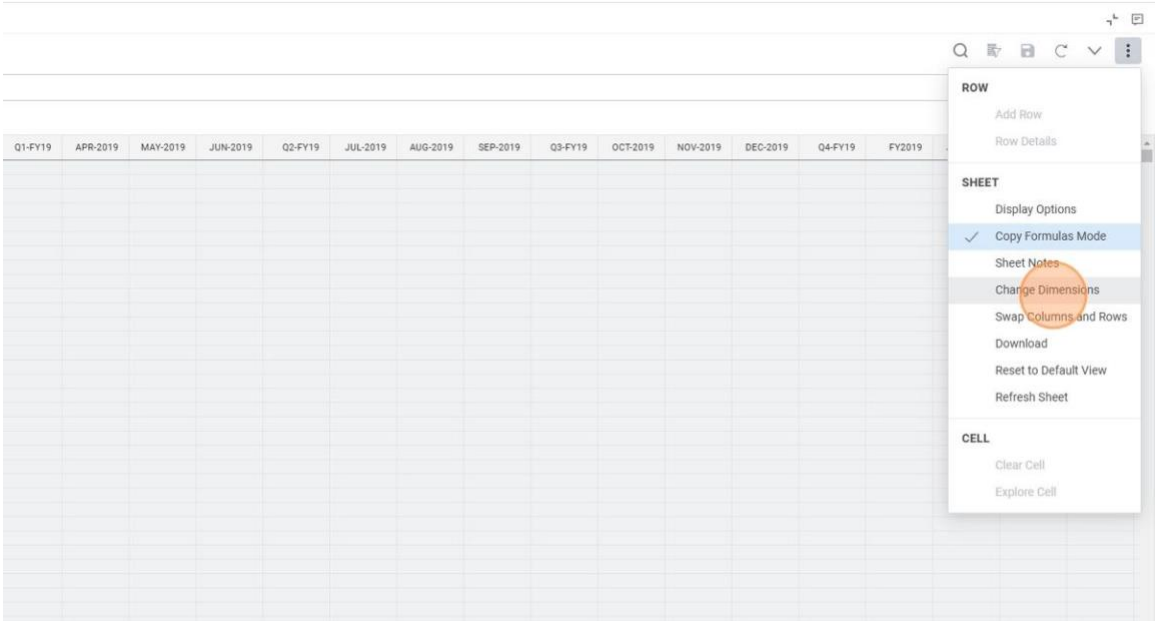


3. Clicking **OK** after refining your selection will update the selected sheet to show the selected years.

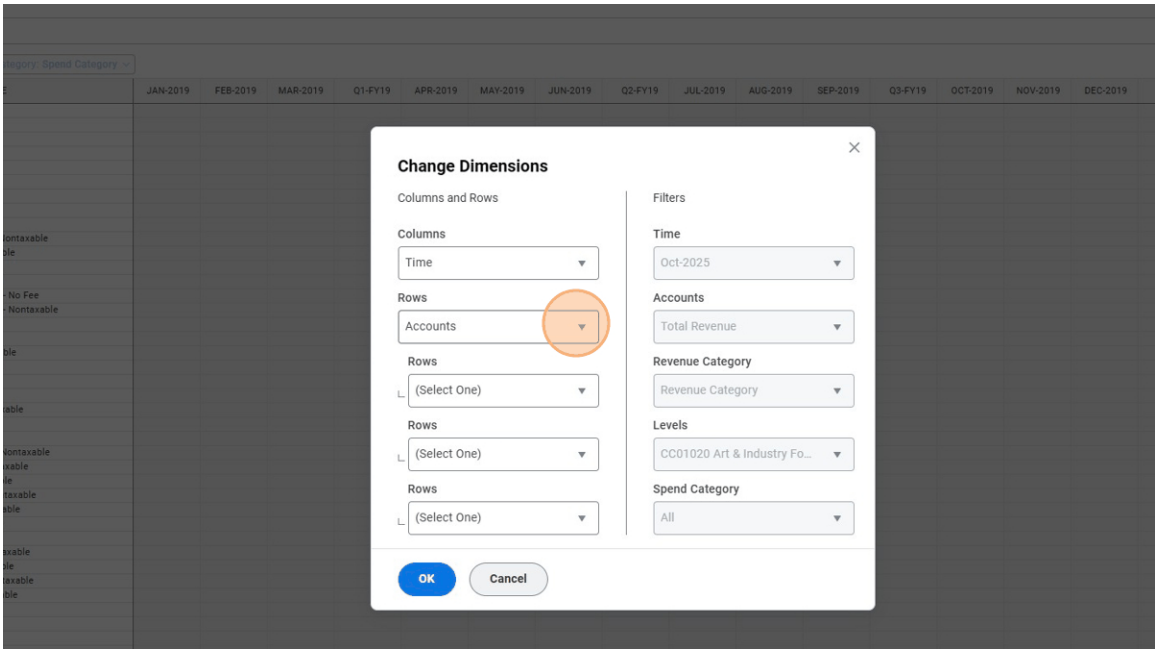


Changing Dimensions on the Income Statement Summary

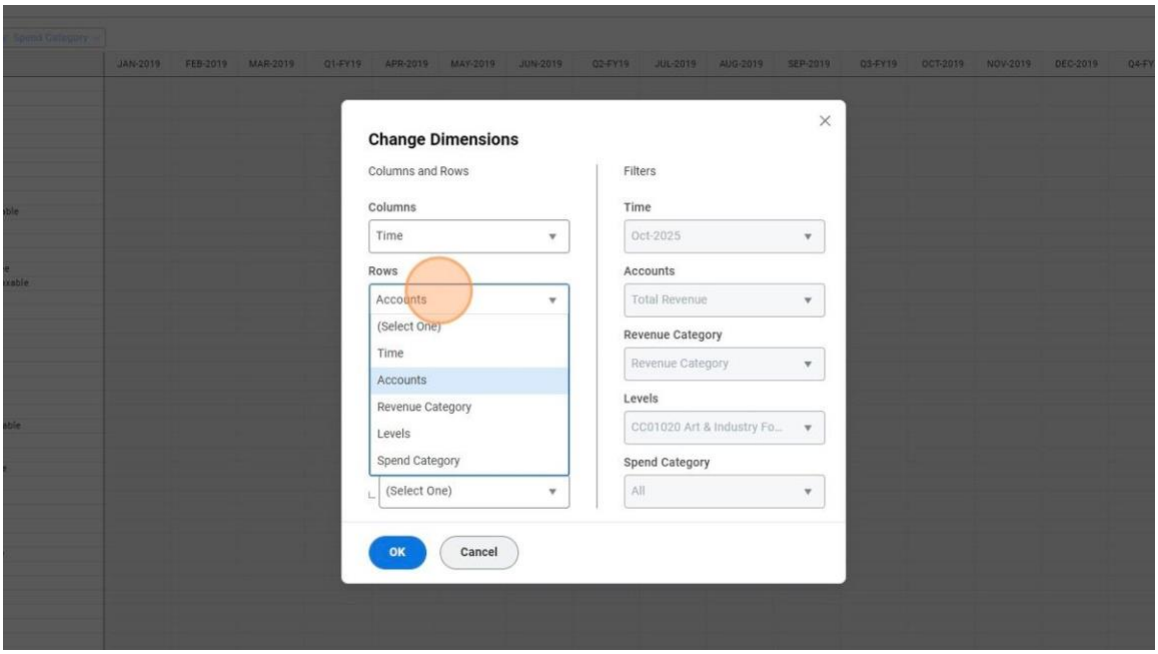
1. Opening the sheet menu on the *Income Statement Summary* and clicking on **Change Dimensions** will open the Change Dimensions Menu.



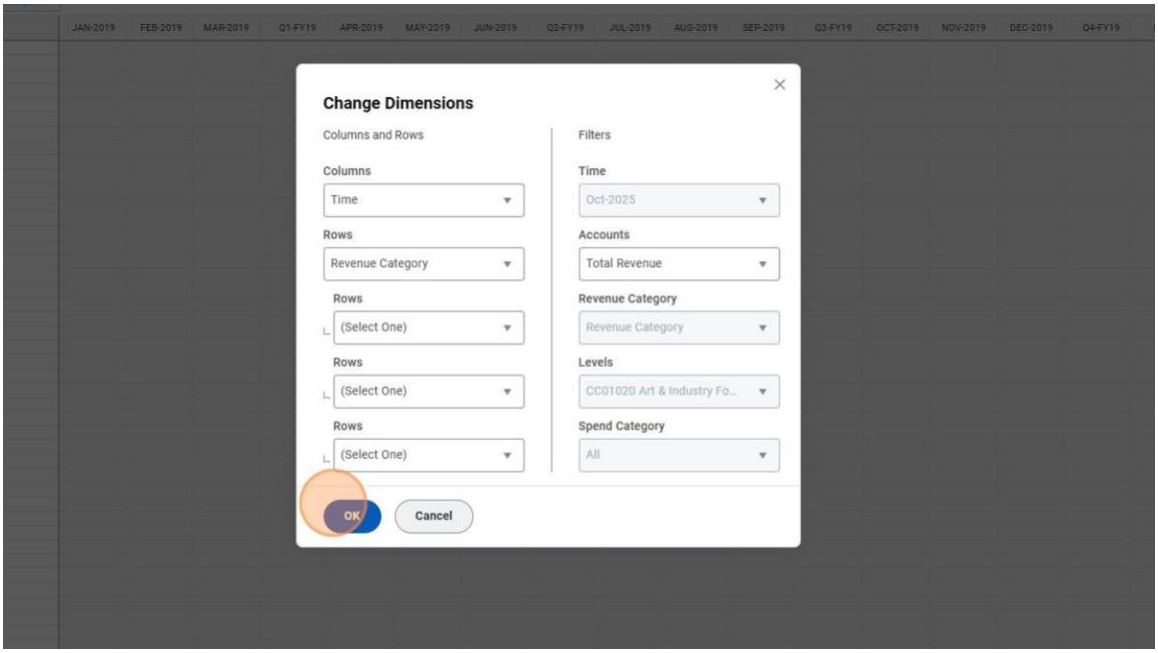
2. Clicking on the first *Rows* option opens a drop-down menu that provides different views to users.



3. The recommended dimensionality is using **Revenue Categories** or **Spend Categories** to view the individual categories.



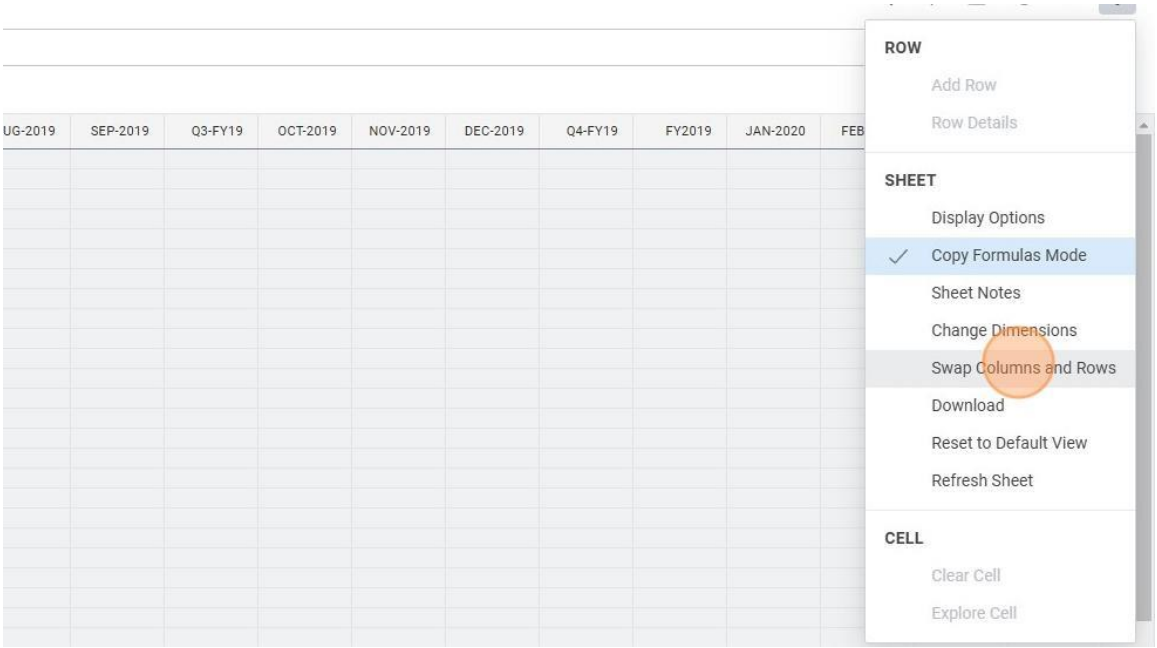
4. Clicking **OK** saves the changes and updates the sheet.



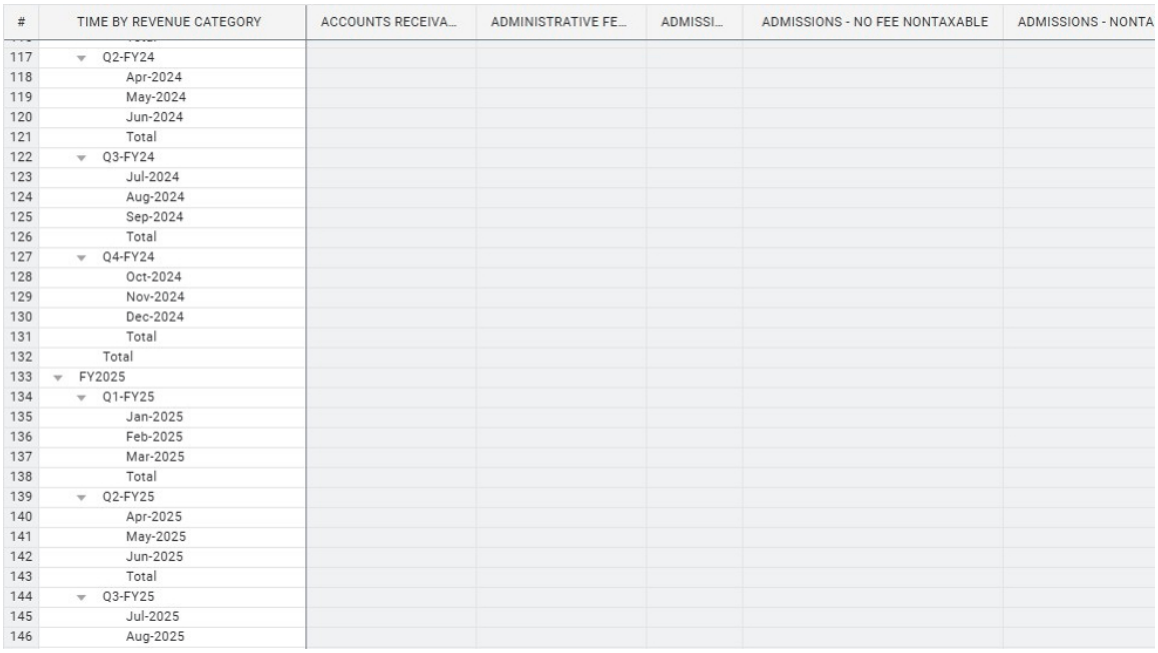
5. Note that only the selected accounts in the dimensionality will be visible (e.g. Users can't see spend categories if they only pick Revenue Categories and vice-versa).

#	REVENUE CATEGORY BY TIME	JAN-2019	FEB-2019	MAR-2019	Q1-FY19	APR-2019	MAY-2019	J
1	All							
2	Accounts Receivable							
3	Administrative Fees							
4	Admissions							
5	Admissions - No Fee Nontaxable							
6	Admissions - Nontaxable							
7	ATM - Nontaxable							
8	Banquet Room Rental							
9	Banquet Room Rental - No Fee							
10	Banquet Room Rental - Nontaxable							
11	Beer							
12	Beer - Nontaxable							
13	Board Plans - Nontaxable							
14	Board Plans - Taxable							
15	Boarder Services							
16	Boat Services							
17	Boat Services - Nontaxable							
18	Cabana Rentals							
19	Campground Rental							
20	Campground Rental - Nontaxable							
21	Catering - Beer - Nontaxable							
22	Catering - Beer - Taxable							
23	Catering - Liquor - Nontaxable							
24	Catering - Liquor - Taxable							
25	Catering - Nontaxable							
26	Catering - Taxable							

6. Columns and Rows can also easily be swapped on the Income Statement Summary by opening the sheet menu and selecting **Swap Columns and Rows**

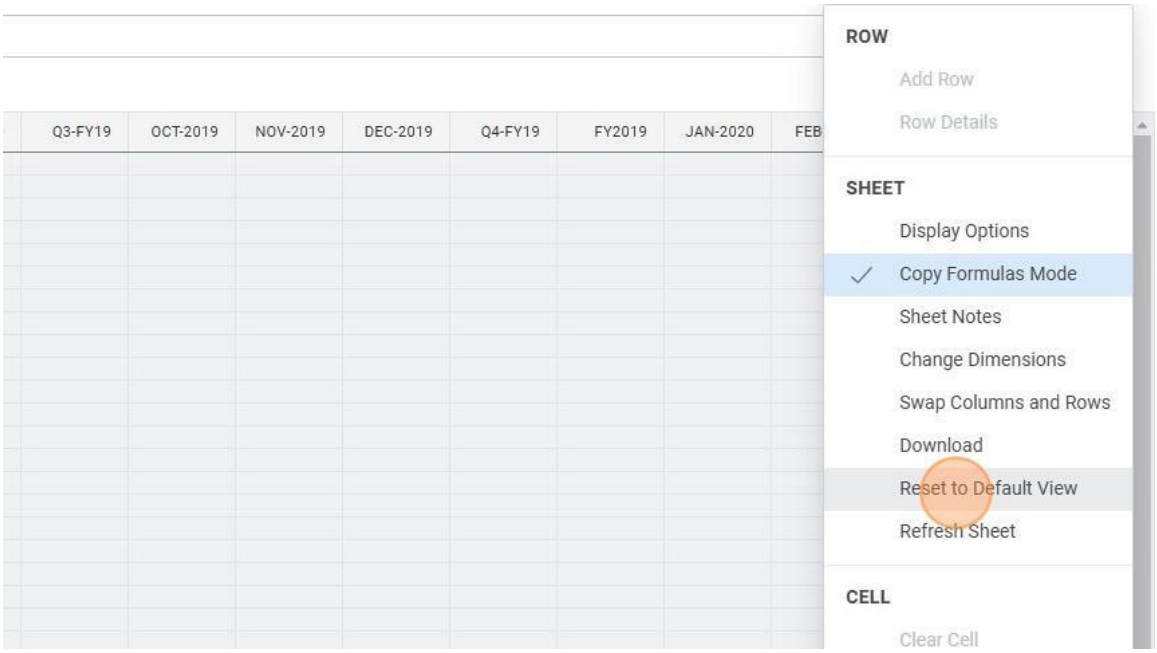


7. This automatically updates the user view on the sheet.



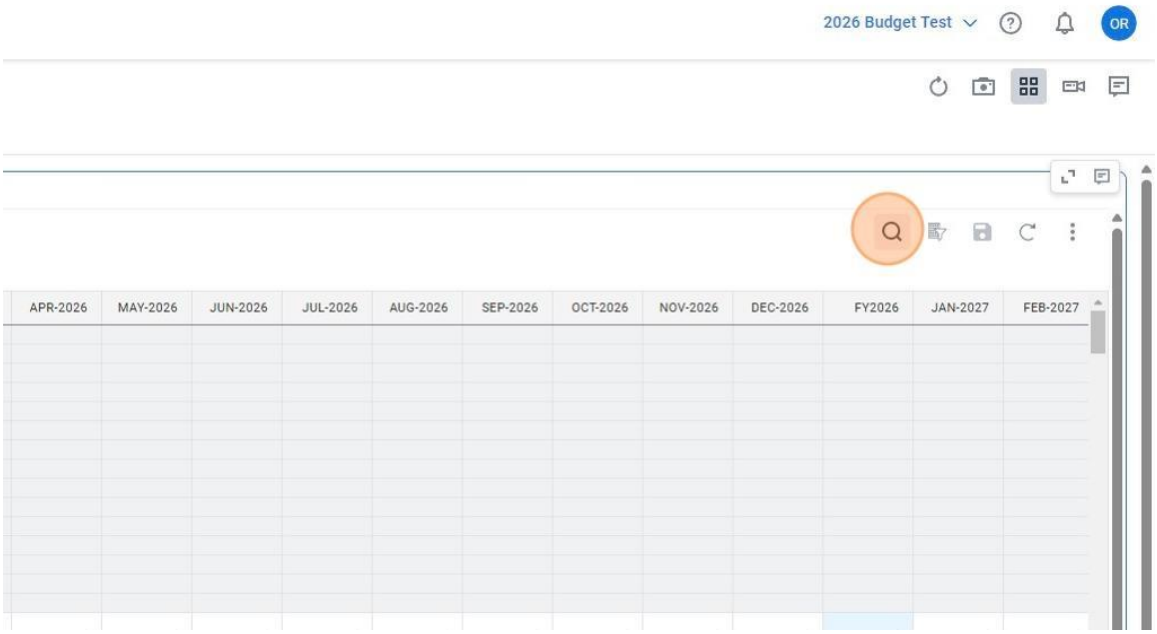
#	TIME BY REVENUE CATEGORY	ACCOUNTS RECEIVA...	ADMINISTRATIVE FE...	ADMISSI...	ADMISSIONS - NO FEE NONTAXABLE	ADMISSIONS - NONTA
117	Q2-FY24					
118	Apr-2024					
119	May-2024					
120	Jun-2024					
121	Total					
122	Q3-FY24					
123	Jul-2024					
124	Aug-2024					
125	Sep-2024					
126	Total					
127	Q4-FY24					
128	Oct-2024					
129	Nov-2024					
130	Dec-2024					
131	Total					
132	Total					
133	FY2025					
134	Q1-FY25					
135	Jan-2025					
136	Feb-2025					
137	Mar-2025					
138	Total					
139	Q2-FY25					
140	Apr-2025					
141	May-2025					
142	Jun-2025					
143	Total					
144	Q3-FY25					
145	Jul-2025					
146	Aug-2025					

8. The sheet view and dimensionality can always be reset to the default by opening the Sheet Menu and selecting **Reset to Default View**

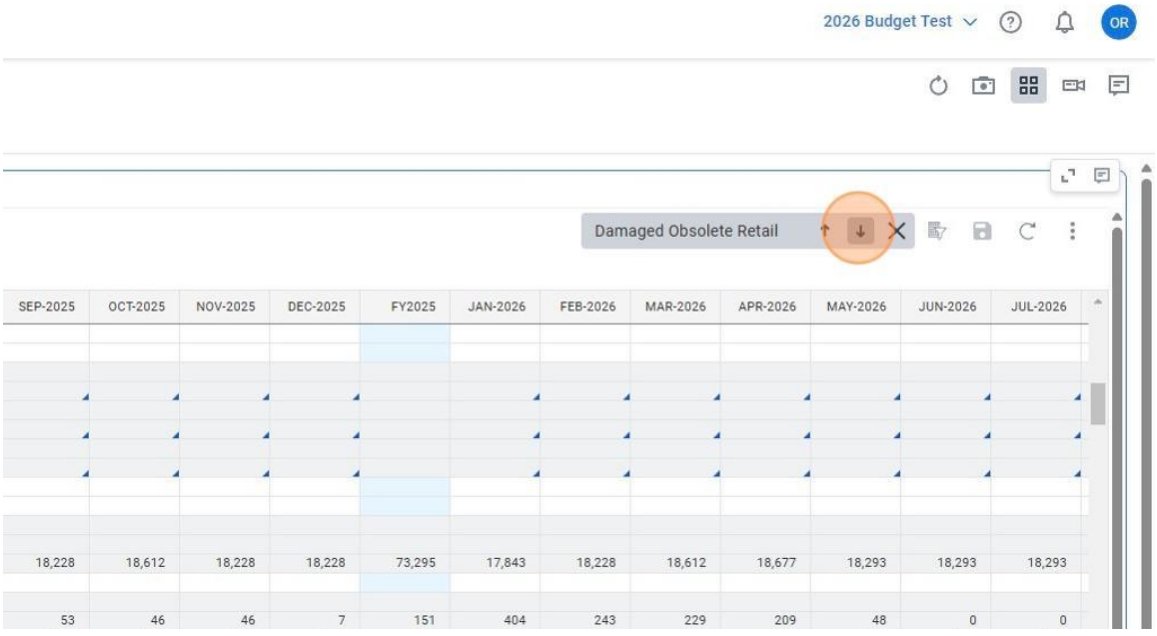


Using the Search Function

1. Clicking on the **Search** icon on a sheet will open a search menu that allows users to enter a spend category or revenue category.



2. Entering the name of the category and clicking on the up or down arrows will automatically search and scroll to the category on the sheet.



3. The searched category will automatically appear at the top of the sheet being used. If there are multiple categories that share the searched term, then you can scroll between them using the up or down arrows on the search bar.



Support Information

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