UVAFinance | Finance Strategic Transformation

Adaptive Planning: Basic Navigation in Sheets

Quick Reference Guide

Overview

This Quick Reference Guide (QRG) is designed to walk users through basic navigation in Adaptive Planning Sheets.

NOTE	This QRG assumes that you already have access to Workday Adaptive Planning and can log in. If you don’t have access yet, submit a System Access Request in Workday to request access. Select **FIN Access Requests**, then **Adaptive Planning Access**, and include the Cost Center(s) that you will need to budget for.

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Getting Started in Sheets

On the Adaptive **Home** screen:

1. Log in.

2. Select the **Global Navigation** Icon.

   The primary point of navigation is the Global Navigation icon. Selecting this icon will drop down a menu of options. Menu items with a right-facing arrow have more choices for you to select.

3. Open your desired **Sheet.**
   Sheets are the interface where users will view, enter, and update plan data.

   There are two ways to access sheets:
   a) Clicking on the word “Sheets” will open a new page with a list of Sheets.
   b) Clicking on the ”right-facing arrow” will display a list of Sheets without opening a new page.

NOTE	To open a sheet in a new tab, right click on the Sheet name and select “open in a new tab.” This is helpful if you want to have multiple sheets or reports open at the same time.

General Navigation

Once sheet is open:

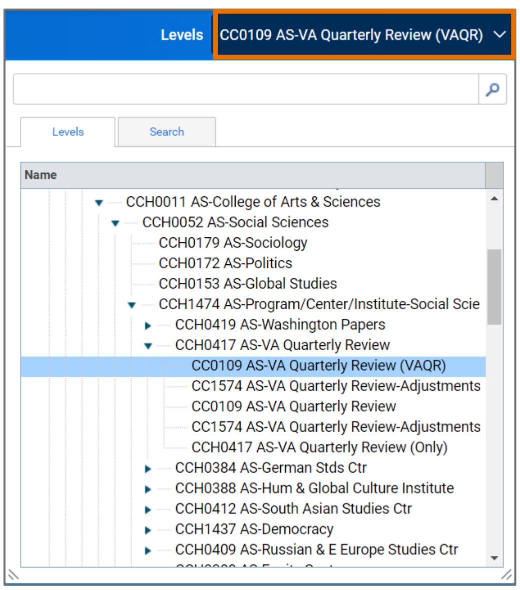
1. Navigate the following sheet attributes to view information or input budget data:

   a) **Budget Version**
   Ensure you have the correct version selected. Select the Working Budget to input data.

   Other versions are locked for editing but are available for reference. If you would like to review other versions, you can select the drop-down arrow and choose from the available versions.

   b) **Levels**
   Ensure you are viewing the Sheet at the correct level by selecting the drop-down arrow and selecting the appropriate level from the list, if not already displayed. Cost Center Hierarchies and Cost Centers that you have access to will be listed. If you are entering data, ensure you are at the Cost Center level (indicated by CC####) not the Cost Center Hierarchy Level (CCH####).

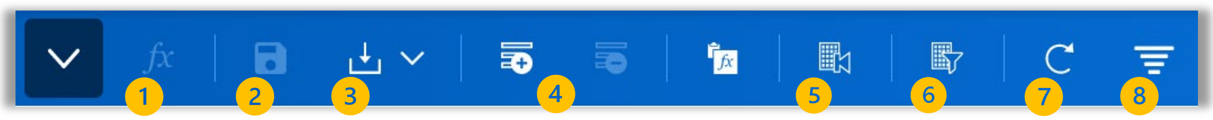
   If you do not see the level(s) you should have access to, email AskFinance@virginia.edu.

   c) **Input Fields**
   The Input Fields are where you enter your Budget. The fields may vary depending on which sheet you are in; however, the following things remain constant:
   - Columns with green checkmarks in the header are required fields.
   - Columns with white backgrounds provide the space for you to enter data with specific data entry requirements – freeform or dropdown selections.
   - Columns with grey backgrounds are auto-populated based on the associated data entered on a row – you are not able to edit these fields.

DESC	GIFT GRANT DESIGNATED	FUND	FUND SOURCE GROUP 2
	GF000518 TE-BA-Batten Sch Ldrshp & Pub Pol	FD024 Restricted Endowment Income Fund	FDH057 Private Restricted
	GF002165 TE-AT-BCS Strickler Scholars Fund	FD024 Restricted Endowment Income Fund	FDH057 Private Restricted
	GF000052 QE-AT-Macilwaine Schl	FD024 Restricted Endowment Income Fund	FDH057 Private Restricted
	GF002174 TE-AT-BCS O'Reilly Scholars Fund	FD024 Restricted Endowment Income Fund	FDH057 Private Restricted
	GF002133 TE-AT-BCS Rogers Family Scholars	FD024 Restricted Endowment Income Fund	FDH057 Private Restricted
	GF002344 TE-AT-BCS Fletcher Scholars Fund	FD024 Restricted Endowment Income Fund	FDH057 Private Restricted
	GF000051 IE-AT-Roberts Scholarship Fund	FD024 Restricted Endowment Income Fund	FDH057 Private Restricted

d) **Toolbar**

The toolbar has several tools to help you enter, remove, filter, and save data. You can always hover over the icon in Adaptive to recall what each feature does, but the orientation below provides some additional detail.



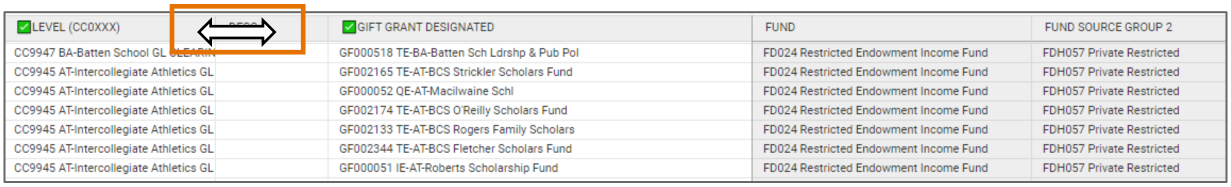
1.	**Formula Assistant:** If a cell uses a formula, clicking this button will provide the correct formula syntax.
2.	**Save:** Saves entries, formatting adjustments, and applied filters. Un-saved sheets will always populate an error message before closing that allows a user to save their work. **Note:** If the save button appears greyed out, this means that your input sheet does not have any unsaved changes. **Note:** Any changes made to a field in an input sheet will always appear in **BLUE** until they are saved.
3.	**Download:** Gives users the options to download or view a printable version.
4.	**Add/delete row:** add a blank row to a modeled sheet. New rows always populate at the bottom of the sheet. Delete row should only be used to delete true errors or extra rows.
5.	**Reset to default view:** removes all filters (in both the "display options" and the "filter bar") and resets sheet to original view. **Note:** Reset to default view will also reset any unsaved changes, so be sure to **remember to save!**
6.	**Display options:** provides access to column-specific filtering.
7.	**Refresh:** refreshes sheet data (like "refresh" in Internet browser). **Note:** Refresh can function as an "undo" button if you have unsaved data (displays in blue text). However, using refresh will undo ALL your work since your last save point.
8.	**Filter bar:** allows dynamic filtering across entire sheet. **Note:** The filter bar is NOT column specific. It uses a "contains" operator and will return results from multiple columns. **Example:** award LC00018 can be found in the "award" column as well as the "notes" column. Adaptive will return results from both columns when using the filter bar.

Modifying Columns

To Resize Columns:

1. Hover cursor over the middle of the two column headers.
   Resizing columns in Adaptive is similar to Excel.

2. Click and drag to resize.
   Drag to the left to contract a column and to the right to expand it.



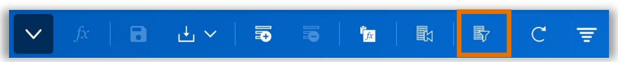
LEVEL (CC0XXX)	GIFT GRANT DESIGNATED	FUND	FUND SOURCE GROUP 2
CC9947 BA-Batten School GL	GF000518 TE-BA-Batten Sch Ldrshp & Pub Pol	FD024 Restricted Endowment Income Fund	FDH057 Private Restricted
CC9945 AT-Intercollegiate Athletics GL	GF002165 TE-AT-BCS Strickler Scholars Fund	FD024 Restricted Endowment Income Fund	FDH057 Private Restricted
CC9945 AT-Intercollegiate Athletics GL	GF000052 QE-AT-Macilwaine Schl	FD024 Restricted Endowment Income Fund	FDH057 Private Restricted
CC9945 AT-Intercollegiate Athletics GL	GF002174 TE-AT-BCS O'Reilly Scholars Fund	FD024 Restricted Endowment Income Fund	FDH057 Private Restricted
CC9945 AT-Intercollegiate Athletics GL	GF002133 TE-AT-BCS Rogers Family Scholars	FD024 Restricted Endowment Income Fund	FDH057 Private Restricted
CC9945 AT-Intercollegiate Athletics GL	GF002344 TE-AT-BCS Fletcher Scholars Fund	FD024 Restricted Endowment Income Fund	FDH057 Private Restricted
CC9945 AT-Intercollegiate Athletics GL	GF000051 IE-AT-Roberts Scholarship Fund	FD024 Restricted Endowment Income Fund	FDH057 Private Restricted

3. Save, if desired.
   Once column widths are how you would like to see them, select the **Save** icon on the toolbar.

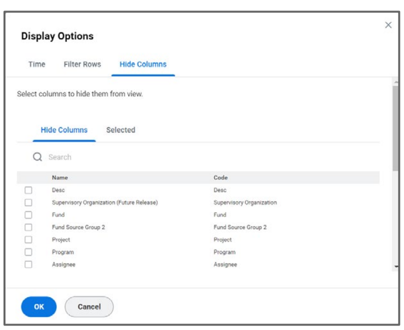
To Hide Columns:

CAUTION	Hiding columns could result in hidden data, so use with extreme caution.

1. Select the **Display Options** icon on the toolbar.



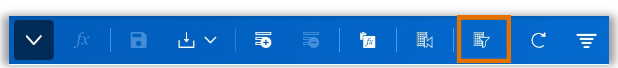
2. Select the **Hide Columns** tab and select the check box(es) next to the column(s) you want to hide.



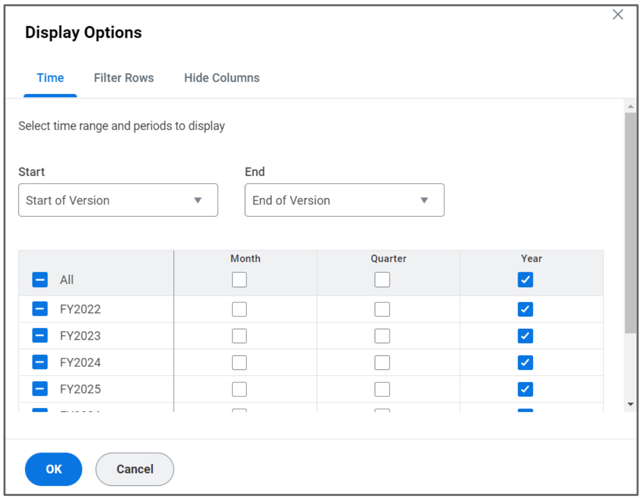
To modify display of time span columns:

NOTE	The time span columns may sometimes break out into month (even after they were once collapsed. Follow the instructions below to modify the column display options.

1. Select the **Display Options** icon on the toolbar.



2. Select the parameters you want displayed.
   Selecting the **Display Options** icon brings up the following window:



Ensure check marks are selected for the parameters you want to display and are not selected (checked) on those you do not want to display. For instance, if you only want to see Fiscal Year, then deselect those in Month and Quarter and check the boxes in Year.

3. Select **OK.**

4. Save your Sheet
   Select the **Save** icon on the toolbar.

To copy/paste from one column to another:

1. Using your mouse, click and drag to highlight cell(s) with the data you want to copy.

2. On your keyboard, hold **Ctrl** and **C** (copy shortcut) to copy the highlighted cell(s).

3. In the column you are copying to, ensure that you select a cell that lines up with the first cell highlighted/copied, hold down **Ctrl** and **V** (paste shortcut). The data should copy over and be lined up with the original cells.

4. Save your sheet to save these changes.

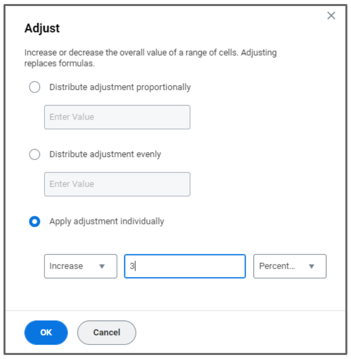
Modifying Rows

To edit row data:

1. Edit data within each cell that you want to modify, then save your sheet.
   Data entry fields with grey backgrounds will auto-populate based on entries in other fields.

2. Adjust amounts in FY fields, if desired.
   The data entry field for FY amounts has an additional option to adjust amounts.

   a) Select one cell or highlight multiple cells, then right-click and select **Adjust.**



b) Adjust as desired. For example, you might want to increase the amount by a certain percent.

c) Select **OK**.

To add new rows:

1. Select the **Add Row** icon on the tool bar (or right-click mouse anywhere in Sheet and select **Add Row**).
2. Enter data into row cells to complete the row. Until you save the sheet, newly entered data will appear blue.
3. Save Sheet.
   Select the **Save** icon on the toolbar.

NOTE

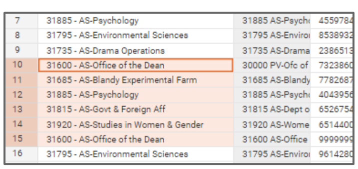
Any time you add a new row, it will add the new row at the bottom of the Sheet. There is no way to add a row in the middle of the sheet, but you can filter the sheet to be able to view similar rows.

If you add a row while a filter is applied, it may seem to disappear when you save the sheet.

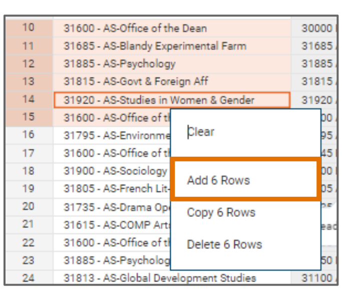
Remember to remove any filters to see the full set of data.

To add multiple rows:

1. Highlight multiple rows within the sheet
   Click inside any column and drag down until you have selected the number of rows that you want.



2. Right Click and select **Add x Rows** (the new rows will appear at the bottom of the input sheet).



4. Enter data into row cells to complete the row. Until you save the sheet, newly entered data will appear blue.

5. Save Sheet.
   Select the **Save** icon on the toolbar.

To copy existing rows:

1. Right Click anywhere on the row you want to copy, then select **Copy Row.** To copy multiple rows, click and drag down to select the rows you want to copy, then Right Click and select **Copy x Rows.**

2. The copied row(s) will show up at the bottom of the sheet. Edit any cells that you want to change. Until you save the Sheet, newly entered data will appear blue.

3. Save Sheet.
   Select the **Save** icon on the toolbar.

To delete rows:

CAUTION	<u>Only use</u> Delete Row if you are correcting an error, such as a row added/duplicated in error or an extra row. Otherwise, zero out the FY amount fields where the row item no longer applies or duplicate the line and modify other cells. This captures the change(s) while still maintaining a record of previous years.

1. Select the row you want to delete.
   To Select an entire row (as opposed to individual cells), click in the Row # cell.

2. Select the **Delete Row** icon on the toolbar (or Right Click on the highlighted row(s) and select **Delete Row(s)**).

3. Confirm you want to delete the row(s).
   When prompted, select **Delete**. Otherwise, select **Cancel**.