

Overview

This Quick Reference Guide (QRG) is designed to walk users through the process of copying data from an external spreadsheet or template into Adaptive Planning Sheets.



This QRG assumes that you already have access to Workday Adaptive Planning and can log in. If you don't have access yet, use [this guide](#) for instructions on how to request "Adaptive Planning Access."

Find Template



Using a template will ensure you have the correct columns. If using a spreadsheet you've already developed, skip this step but ensure you have the same columns.

On the Adaptive **Home** screen:

1. Select the Menu Icon.




The primary point of navigation is the Menu 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.

2. Click on **Reports**.
3. Click on **Shared**.
4. Open the **System Resources** folder.
5. Open the **Copy Paste Templates** folder.
6. Open your desired template. Ensure it corresponds with the Adaptive Sheet you are updating.

This will open as an Excel spreadsheet.

7. Populate the spreadsheet with your data.

Formatting Adaptive prior to Copy/Paste



NOTE

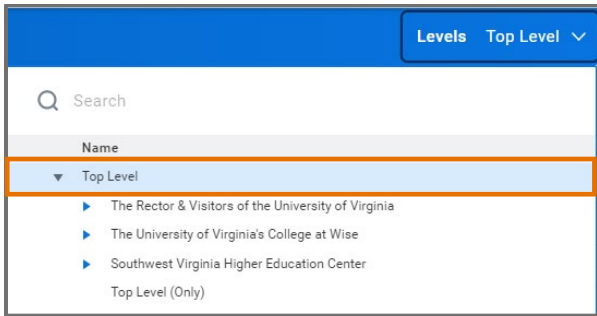
Before you paste data into Adaptive Sheets, you **must** ensure the following:


- 1) Your sheet is displayed at the Top Level
- 2) You have no hidden columns
- 3) Your sheet is **not** displaying Months/Quarters

If the columns on the Adaptive Sheet and the spreadsheet you're pasting from do not match exactly, you will not get your data to paste into the proper columns.

From your Adaptive Sheet:

1. Select **Top Level** from the level selector, located on the right side of the blue toolbar:







NOTE

While displaying at the Top Level, you can still view a select Cost Center by adding a row filter:

- Select **Display Options** from the toolbar.



- Select the **Filter Rows** tab, then add a filter to include “**Level (CC0XXX)**” and “**contains**” and [desired cost center]



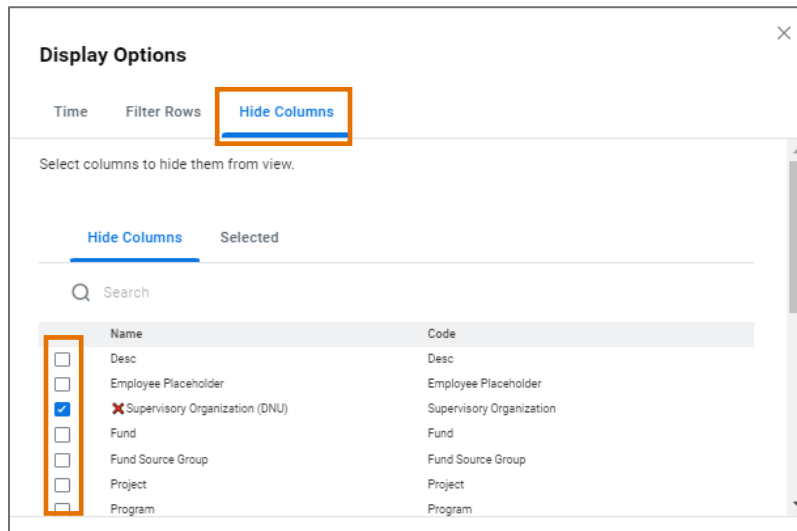
- Click **OK**.

2. Verify no columns are hidden:

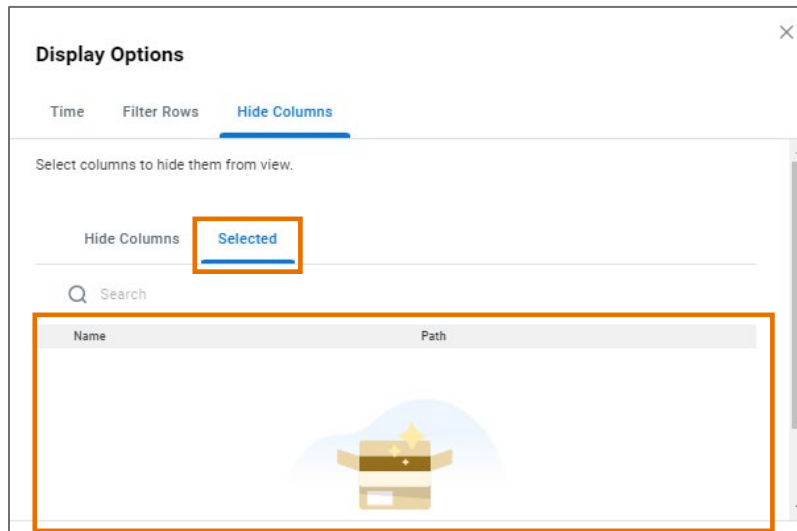
- Select **Display Options** from the toolbar.



- Click on the **Hide Columns** tab, then uncheck any boxes that are checked.



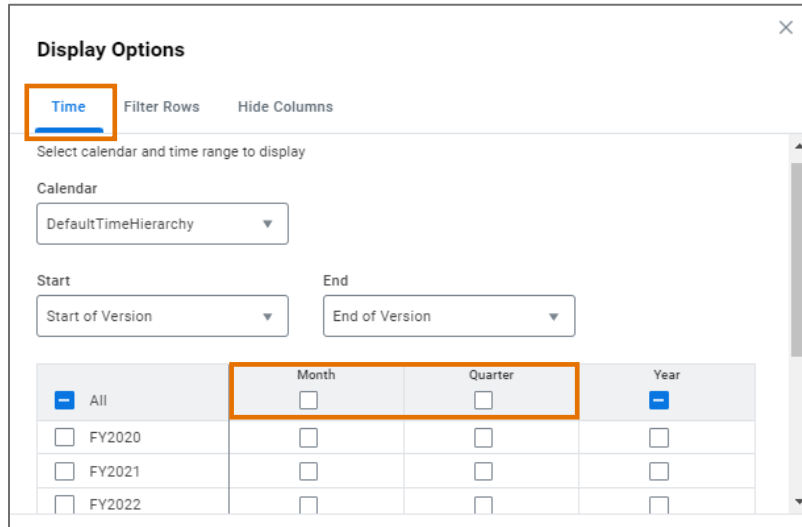
- Finally, select the **Selected** tab, verify there are none selected, and click **OK**.



- Do not click OK yet. Leave **Display Options** open for next step.

3. Ensure your sheet is not displaying Months/Quarters:

- Select the **Time** tab and unselect the check boxes under Month and Quarter.



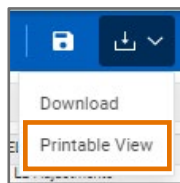
- Click **OK** to save your changes to **Display Options**.

Pasting Data into Sheets



It is critical that the columns match between the spreadsheet you are copying from and the Adaptive Sheet you are pasting to. Use the template provided or ensure that your spreadsheet contains the same columns in the same order. Even if a column has no data, it still needs to be copied over.

If downloading the Adaptive Sheet to verify columns match, download the printable view:



In your spreadsheet/template:

1. Highlight all rows/columns.
2. **Ctrl+C** to copy, or Right Click and select **Copy**.

In your Adaptive Sheet:

3. Click the Add Row button in the blue toolbar:



The row will be added to the bottom of your sheet and the first cell will be highlighted in orange:



4. **Ctrl+V** to paste. This will add all of your rows and columns (except the FY amount columns).
Do not save yet.

In your spreadsheet/template:

5. Highlight all of the FY amount columns/rows again (not the header) and **Ctrl+C** to copy or right click and select **Copy**.

FY2023	FY2024
46,816.48	
26,333.00	12,766.00
14,350.00	

In your Adaptive Sheet:

6. Click in the first blue FY cell for the rows you've added and **Ctrl+V** to paste.

23,400.00	0.00

} New rows

This will fill in all the amounts you copied from the spreadsheet.

7. Save your changes to the input sheet. Click the save button in the blue toolbar:



You have successfully completed this task.