

Adaptive Planning 2025-26 Position Budgeting Manual

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General Notes

Sheets and Dashboards

Within Adaptive Planning (ADP), you will use three primary means of viewing and entering data: Sheets, Widgets, and Dashboards. Sheets are dynamic spreadsheets used for specific data entry purposes. Widgets provide small pieces of data summarized as a single number, table, or chart/graph. Dashboards allow for a combination of Sheets and Widgets to be displayed on screen together. Due to the various benefits of using Dashboards, they are recommended for all your entry instead of using the sheets directly.

Versions

Versions distinguish datasets by purpose and/or time frame. For example, the 2025-26 Operating Budget Version encompasses both Position Budgeting and Budget Entry (see Figure 1). There are also Versions for individual pay periods for rate tracking purposes, Carryforward Spending Plans, and Merit Entry.

The system has a default Version, but you may have access to other versions with the menu in the top-right corner. The system will remember your preferred Version after entering and saving data. See below for a screenshot of the Version selection. **If the data you're viewing is unexpected, please verify you've selected the correct version.**

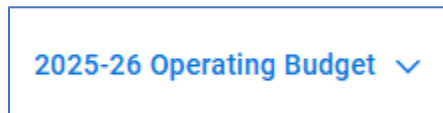


Figure 1 View and select the “Version” in the top-right corner of the screen.

Position Budgeting Edit Access by Home Department

Home Departments are used to control access to edit/adjust data within Position Budgeting and Position Transfers. While a particular department may fund a position, the position “belongs” to the designated Home Department. Therefore, positions are listed by their Home Departments rather than their funding departments within Adaptive Planning.

Position Budgeting Access for Budget Preparers

If you are a Budget Preparer, you will have read-only access to Position Budgeting by Funding Department based on which departments you are designated as the Budget Preparer. If you are also a Salary Preparer, you will retain edit access to positions based on the Home Departments you are designated as Salary Preparer for. If you are both a Budget Preparer and Salary Preparer, you will have edit access to positions based on their

Home Department and may have additional read-only access to portions of positions based on their Funding Department.

Levels

Within OMNI Financials, Budget Preparers are associated with individual Department IDs. These department “designations” are reflected within ADP as “Levels” (see Figure 2). For example, if John Smith is the Budget Preparer for Department 123000, his Levels will include Department 123000.

Outside of Position Budgeting, Levels act as a security/access mechanism for Budget Entry and identify the Department ID within FSU’s department tree.

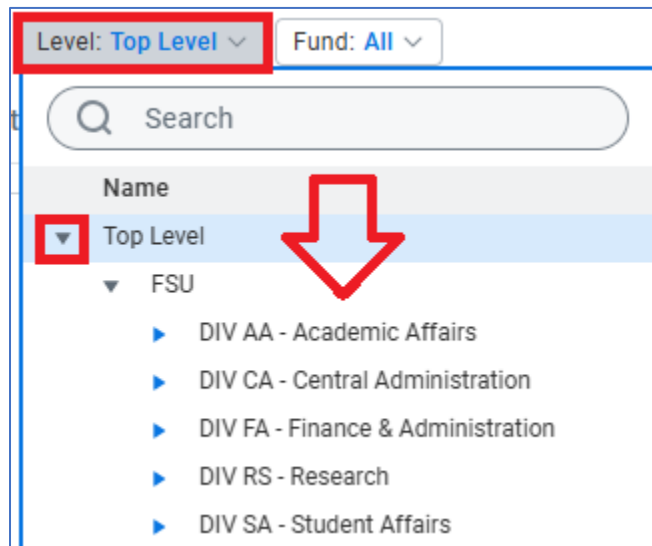


Figure 2 Some sheets have the Level selection on the right side of the ribbon.

Depending upon the Dashboard you are using or the specific department you are entering the budget for, you may need to change your Level selection in the ribbon below the top of the screen (see Figure 3).

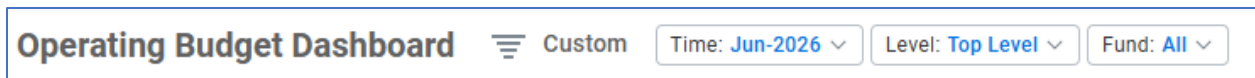


Figure 3 On Dashboards, the Level selection is typically in the middle of the ribbon.

Preferences

Adaptive Planning (ADP) will save preferences as you use the system. These include saving selections for version, Level, Display Options and Filters, and column widths, among many others. If you adjust a column’s

width and wish to keep that column width as your default preference, click the save (diskette) icon in the toolbar.

Suppose you arrive on a screen where the data is unexpected. In that case, you may want to review your selections for version, Level, Display Option, or other possibilities for why the information is not what you expected. Please keep these preference settings in mind when navigating the system.

Text and Cell Styles

ADP uses text and cell style/colors to indicate the source or status of data. Bold text indicates whether the value is a total or roll-up amount. Unsaved data is indicated by blue text, and green text indicates Actuals data (i.e., Actuals data imported from Financials). Grey cells are locked, and blue cells are unlocked but associated with total/roll-up values. See Table 1 for examples.

Table 1 Adaptive Planning identifies different statuses and types of data by color and style.

Font/Background Style	Description
Black Font	Saved values
Green Font	Actuals
Blue Font	Unsaved values
Bold Font	Totals/Roll-up values
Grey Background	Locked cell
Blue Background	Totals/Roll-up values (Unlocked)

Resizing Column Widths

To quickly auto-resize a column's width to fit the data/values in the column, select the side of the column you wish to auto-resize and double-click the divider in the column header. See Figure 4.



Figure 4 Double-click the divider to auto-resize the column's width.

Please keep in mind that once you begin editing data/values in the sheet, and then save the data, Adaptive Planning will save your column width preferences.

Getting Started

Browser Compatibility

Workday's recommended browsers are Chrome and Firefox, but other browsers may also work. Please ensure your browsers are up to date before using Adaptive Planning (ADP). If you have any technical issues related to your browser use, please get in touch with the Budget Office (budget@fsu.edu).

Login

Authorized users may log in through the ADP portal or myFSU (both via CAS/SSO). The direct URL to the ADP portal is:

<https://cas.fsu.edu/cas/idp/profile/SAML2/Unsolicited/SSO?providerId=https://login.adaptiveinsights.com:443/samlso/RINVMQ==>

Alternatively, you may log in via the myFSU portal and use the ADP icon provided there (Figure 5).

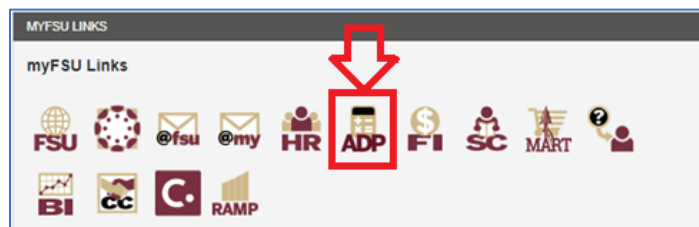


Figure 5 Access Adaptive Planning via the calculator icon on the myFSU portal.

Position Budgeting Dashboard

Overview

The Position Budgeting Dashboard provides a single access point for all changes to positions. For example, changing the incumbent in a position, changing the base pay of a position, transferring a position between home departments, or adjusting the funding distribution of a position are all changes that may be made on the Position Budgeting Dashboard.

Navigation

You can navigate to the Position Budgeting Dashboard by clicking the “hamburger” icon at the top-left of the screen, selecting “Dashboards” (Figure 6), selecting the “Operating Budget Dashboards” folder (Figure 7), and then selecting “Position Budgeting Dashboard” (Figure 8).

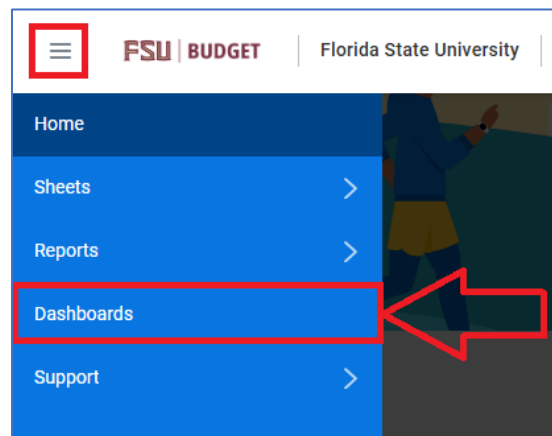


Figure 6 Select “Dashboards” from the left-hand menu.

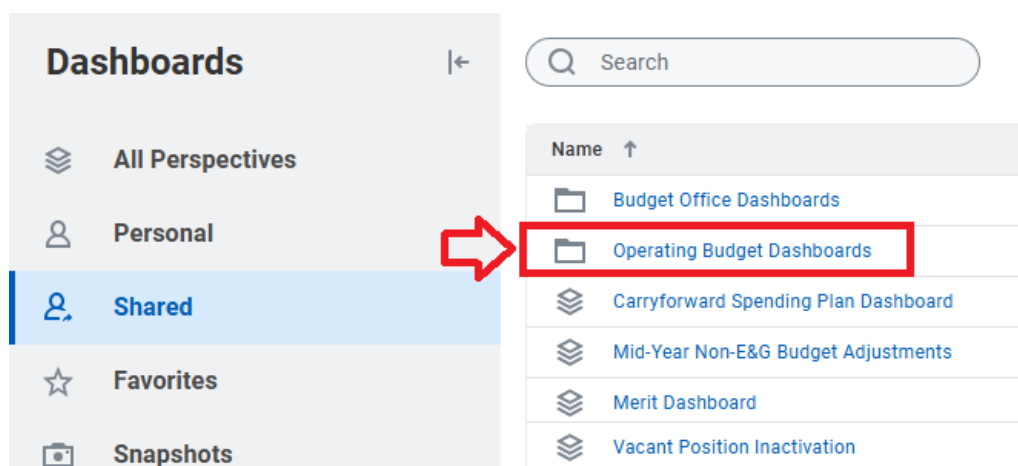


Figure 7 Select the “Operating Budget Dashboards” folder.

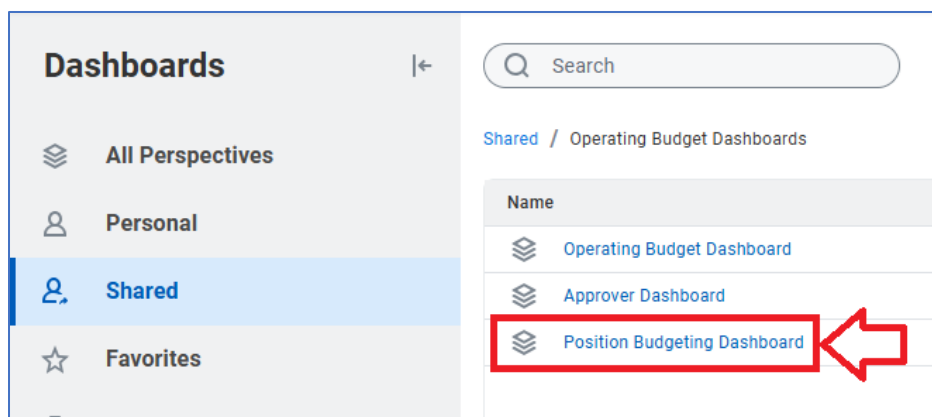


Figure 8 Select the “Position Budgeting Dashboard”.

The Position Budgeting Dashboard provides edit access to Salary Preparers and view only access to Budget Preparers. As a Salary Preparer, you will be able to view and edit all the positions associated with your Home Department designation(s) and their various funding sources. Please keep in mind that you may control a position whose funding resides outside of your purview.

Ribbon

Along the top of the dashboard, there is a ribbon that provides some useful ways of filtering your data (Figure 9).



Figure 9 The ribbon provides an easy and quick means to filter data.

- **Level** – Filter by Funding Department
- **Salary Type** – Filter for Faculty, Staff, or both (“All”)
- **Fund_Type** – Filter by E&G, Carryforward, Non-E&G, Foundation, C&G, or DSO funds
- **Filled/Vacant** – Filter by whether the position is filled or vacant
- **Home_Department** – Filter by Home Department

There are five tabs on the Position Budgeting Dashboard: (1) Home Departments, (2) Position Budgeting, (3) Position Transfers, (4) Information, and (5) Reviews & Reports.

The Home Departments tab lists all your home departments that you have access to as well as some widgets. The Position Budgeting tab is the primary tab and contains all position data elements necessary to the budgeting process. The Position Transfers tab provides a means to request and/or record any position transfers between home departments. The Information tab provides some essential information and links to resources (including this user manual) all in one place. Lastly, the Reviews & Reports tab provides a guided self-review with links to useful reports. See Figure 10.

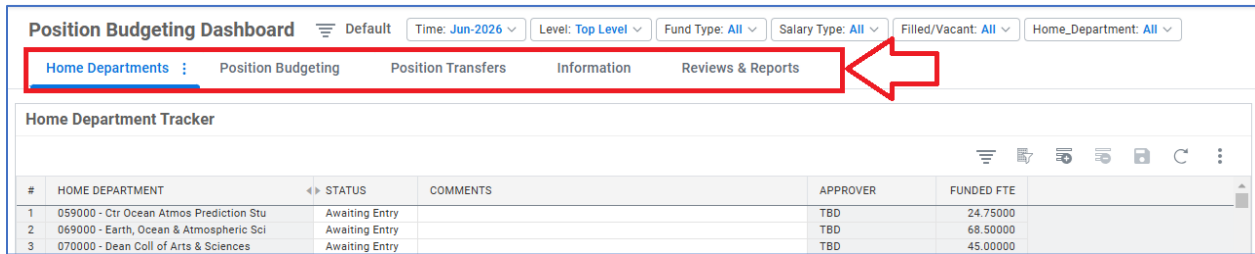


Figure 10 The Position Budgeting Dashboard has three tabs. Each serves a separate function.

Toolbar

Every sheet view in the Position Budgeting Dashboard includes a toolbar (Figure 11). With this toolbar, you can add rows, delete rows, save, refresh, set specific display option preferences, filters, and download the data to Excel. The three vertical dots on the right side of the toolbar provide more options.

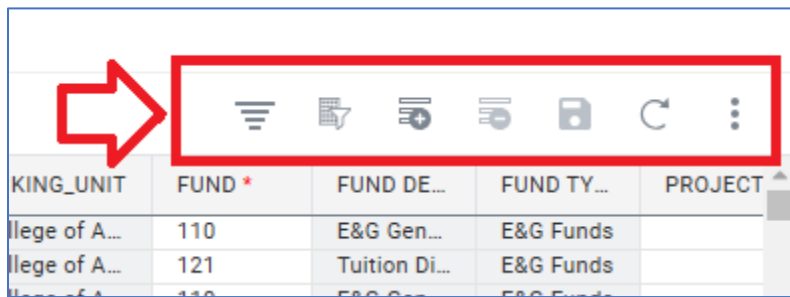


Figure 11 The Position Budgeting Dashboard has three tabs. Each serves a separate function.

Widgets

There are a variety of widgets available on the Position Budgeting Dashboard. Some of these provide information in charts or individual amounts (Figure 12).

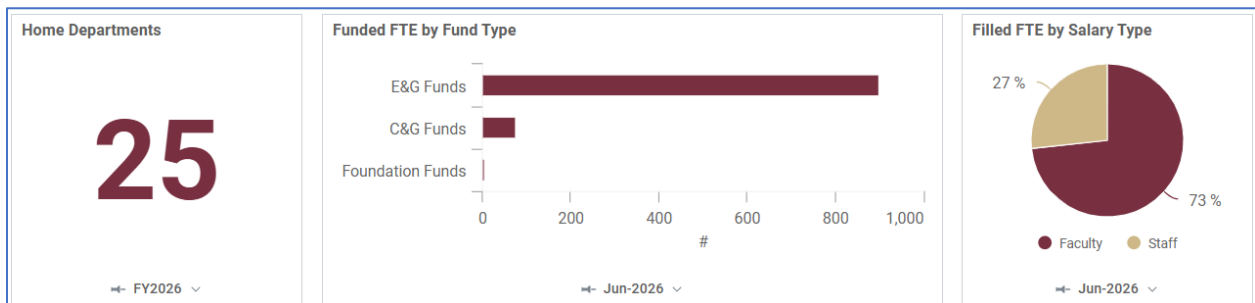


Figure 12 Widget help to visualize the data on your dashboards and point out useful metrics.

Changes to Positions/Employees

Except for transferring positions, all changes to a position will be made on the Position Budgeting tab. The sections below include step-by-step instructions for various actions you may need to take to adjust your positions, salary, and benefits.

Add a “To Be Hired” (placeholder) Position

A “To Be Hired” position is used as a placeholder for new positions which have not yet been established in OMNI HR. If you know there will be a new position created in the upcoming fiscal year, then creating a “To Be Hired” position will be necessary.

To add a “To Be Hired” position, you may add a new row or copy an existing row. It will typically save time to copy an existing position with similar characteristics rather than adding a new position and filling in all the details from scratch. This section will describe the copy row method.

- 1) Identify a position that is similar to the position you’d like to create. Right-click on the position you wish to copy and select “Copy Row” from the drop-down menu to create a copy. (Alternatively, you can click the “add row” icon in the blue toolbar to create a blank row). Figure 13.

#	HOME_DEPARTMENT *	POSITION *	EMPLOYEE_ID	RC
1	076000 - Classics	00058197	200206497	0
2	076000 - Classics	00056778	000038856	0
3	076000 - Classics	00057715	000000000	x
4	076000 - Classics	00082642	000095647	3
5	076000 - Classics	000829		1
6	076000 - Classics	000820		0
7	076000 - Classics	000538		0
8	076000 - Classics	000538		1
9	076000 - Classics	000553		2
10	076000 - Classics	00054		0
11	076000 - Classics	00054		1
12	076000 - Classics	000552		0
13	076000 - Classics	000517		1
14	076000 - Classics	000519		1
15	076000 - Classics	000518		x
16	076000 - Classics	00055983	000036194	0

Figure 13 Right-click and select “Copy Row” from the drop-down menu.

The copied row will be added to the bottom. The blue text indicates the data has not been saved (Figure 14).

14	076000 - Classics	00051959	000099092	1
15	076000 - Classics	00051891	000000000	x
16	076000 - Classics	00055983	000036194	0
17	076000 - Classics	00051867	000066173	1
18	076000 - Classics	00051869	000000000	x
19	076000 - Classics	00051870	000007707	0
20	076000 - Classics	00051872	000006295	0
21	076000 - Classics	00051875	000000000	x
22	076000 - Classics	00054919	000113036	0
+	076000 - Classics	00082642	000095647	3

Figure 14 The new copied row will be added to the bottom of the sheet.

- 2) Change the position number of the copied row (indicated by blue text) to a “TBH” position. Select the down arrow next to the position number and type “TBH” into the search bar at the top. Select one of the TBHxxxxx positions listed. Figure 15.

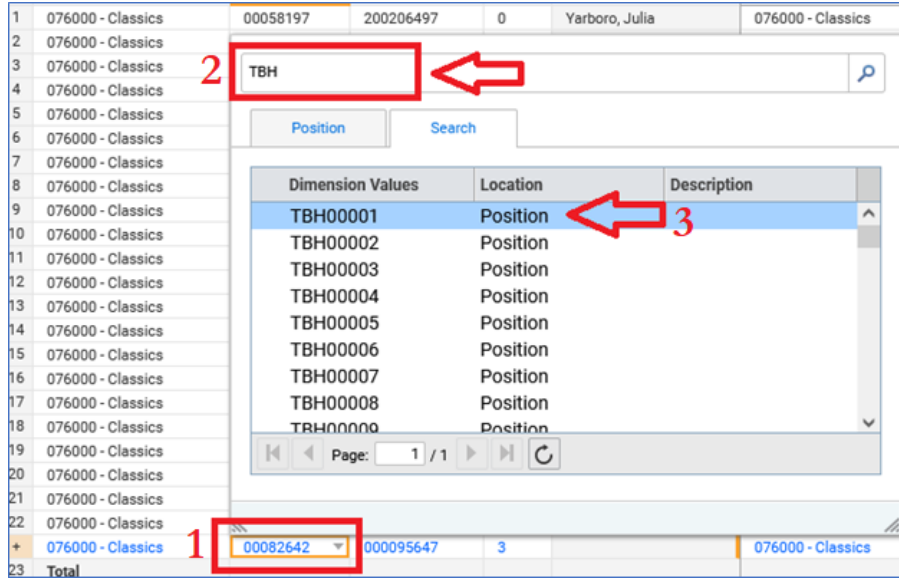


Figure 15 Select a “TBH” position from the available list. You can select any as long as they’re unique for each Home Department.

- 3) Change the Employee ID of the new row. You may use the vacant placeholder (“000000000”) or the “To Be Hired” placeholder (“999999999”). If you select the vacant placeholder (“000000000”), please make sure to adjust the Employee Rcd to “x” for consistency with the other vacancies. Figure 16.

076000 - Classics	00051867	000066173	1	
076000 - Classics	00051869	000000000	x	
076000 - Classics	00051870	000007707	0	
076000 - Classics	00051872	000006295	0	
076000 - Classics	00051875	000000000	x	
076000 - Classics	00054919	000113036	0	
076000 - Classics	TBH00001	999999999	0	To Be Hired
Total				

Figure 16 Change the employee ID as needed.

- 4) Change any remaining elements for the position such as Funding Department, Fund, Salary, Distribution %, etc.
- 5) Once you have made all your changes, click the save (diskette) icon on the blue toolbar at the top.

Change the properties of a Position

To change the properties of a position, make your changes within the desired rows. The specific element(s) that you've changed will turn from black to blue, indicating that the data is not saved.

- 1) Depending on the properties you wish to change, you may select the drop-down menu to change the property or type in the amount. For example, if you wish to change the Fringe Pool selection, hover over the cell you wish to change, left-click the down arrow, and select the new Fringe Pool from the menu (Figure 17). Once you have made your changes, click the save (diskette) icon.

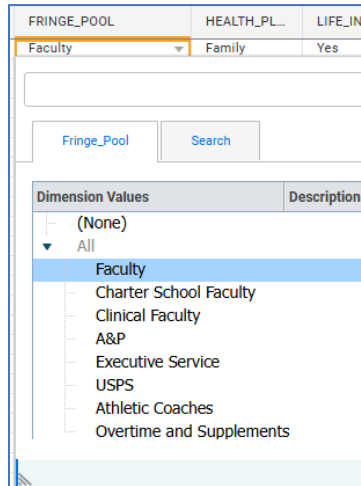


Figure 17 Select the Fringe Pool selection from the menu.

Alternatively, for amounts, type the new value into the cell. Below is a change to FTE (Figure 18).

y	90019S	Professor 9 Mo SAL	1.0000	1.00000	20E
y	90029S	Asoc Professor 9 Mo SAL	1.0000	1.00000	20E
y	90039S	Asst Professor 9 Mo SAL	1.0000	1.00000	20E
y	90019S	Professor 9 Mo SAL	1.0000	1.00000	20E
y	90029S	Asoc Professor 9 Mo SAL	1.0000	1.00000	20E
	0114	Office Administrator	1.0000	1.00000	31E
y	90019S	Professor 9 Mo SAL	1.0000	1.00000	20E
y	9060AS	Teaching Faculty I 12 Mo S...	0.5000	1.00000	20E
			22.5000		

Figure 18 Amounts can be entered directly into each white cell (grey cells are locked).

NOTE: If a position is split funded, please make sure all applicable rows are adjusted and all distribution percentages add up to 100%.

Transfer a Position to a different Home Department

To transfer a position to a different home department, you will select the Position Transfer tab on the Position Budgeting Dashboard. This is true even if the position transfer is between two home departments that you control. The Position Transfer sheet acts as a record for all transfers.

- 1) To request or record a position transfer, click the Add Row icon in the toolbar to create a new row (Figure 19).

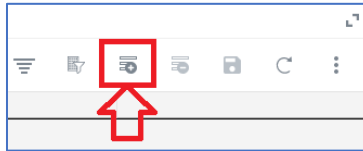


Figure 19 Add a row to the Position Transfer sheet by clicking the Add Row button.

- 2) In the new row, select the position number you wish to transfer. Then select the home department you wish to transfer it from (note: this should be the current home dept) and the home department to transfer it to. The fourth column (“Home Dept (Y/N)”) is a flag that will let you know whether the To Home Department is a home department. Set the status to Requested and enter any comments (Figure 20). Once you’ve made your entries, click the save (diskette) icon in the toolbar.

#	POSITION	FROM HOME DEPARTMENT	TO HOME DEPARTMENT	HOME_DEPT_(Y/N)	STATUS	COMMENTS
1	00058004	058000 - Instruction & Research Reserve	074000 - Biological Science	Y	Completed	
2	00058035	046005 - Institutional Research	046006 - Institutional Rsrch Overhead	N	Completed	
3	00058645	058000 - Instruction & Research Reserve	057000 - Provost & VP Academic Affairs	Y	Completed	
4	00051001	001000 - President's Office	001009 - Student Veterans Center	Y	Completed	
5	00051017	057000 - Provost & VP Academic Affairs	047000 - University Relations	Y	Completed	
+	00051166	076000 - Classics	083000 - Philosophy	Y	Requested	Transfer to Philos...

Figure 20 Complete the transfer details and click save.

- 3) If the To Home Department is within your control, you may navigate back to the Position Budgeting tab and complete the transfer yourself. Otherwise, the Budget Office will do that for you.

Zero out a Position

If you wish to zero out the budgetary effects of a position, this can be done by simply setting the salary to \$0.00 (Figure 21). This will also zero out any benefits (which are based upon a Fringe Benefits Pool percentage).

SALARY	SAL ADJ %	ADJUSTED SALARY
0.00	0.0000%	33,005.08
53,355.78	0.0000%	53,355.78
43,803.80	0.0000%	43,803.80

Figure 21 To zero out a position, simply change the salary amount to \$0.00 and save.

NOTE: Do not delete rows from the Position Budgeting tab. If you mistakenly click this icon, it will prompt you to confirm before the deletion.

Change the amount of a Base Pay or Additional Pay

To change base pay or additional pay amounts, change the amounts in the cells. The text will turn blue, letting you know that the data is unsaved.

- 1) If you're changing the base pay or ADS pay amount, enter the new amount in the Salary column (Figure 22). (**Note:** If the position has an additional pay, please make sure you're adjusting the correct cell. Shift differential amounts – SF1 and SF5 – will be automatically calculated in the Adjusted Salary column based upon any changes made in the Salary column.) The pay type is indicated in the column immediately before the Salary column.

SC	PAY_TYPE	SALARY	SAL ADJ %	ADJUSTED SALARY
	Base Pay	76,120.97	0.0000%	76,120.97
	Base Pay	200,000.00	0.0000%	181,533.84
	ADS	23,274.00	0.0000%	23,274.00
	Base Pay	174,613.69	0.0000%	174,613.69

Figure 22 Enter the new salary amount into the Salary column and click Save.

- 2) For split funded positions, be sure to change the base pay on each funding distribution row.
- 3) Once you have made your changes, click the save (diskette) icon in the toolbar.

NOTE: You may also use the SAL ADJ% to provide a simple percentage increase to the salary amount. However, you will need to apply this SAL ADJ% to all rows if the position is split funded.

Change an existing Funding Distribution

This section will provide step-by-step instructions for changing the funding distribution of a current split funded position. (Note: For adding a *new* funding split, please see the next section for instructions.)

To change the funding split of existing funding distributions, type in the new funding distribution amounts related to the position so that the total distribution amount for the pay type totals 100% (Figure 23). Click the save (diskette) icon to save your changes.

PAY_TYPE	SALARY	SAL ADJ %	ADJUSTED SALARY	DIST %
Base Pay	78,000.00	0.0000%	78,000.00	100.000%
Base Pay	52,000.00	0.0000%	52,000.00	100.000%
Base Pay	42,864.00	0.0000%	42,864.00	100.000%
Base Pay	125,000.00	0.0000%	125,000.00	100.000%
Base Pay	75,987.79	0.0000%	75,987.79	10.000%
Base Pay	75,987.79	0.0000%	75,987.79	90.000%

Figure 23 Enter the new distribution percentage for split funded positions in the Dist% column and click Save.

Add a new Funding Distribution

To add a new funding distribution, you will need to create a new row for a position and add the new funding source, fund, and distribution.

- 1) Right-click on the position you wish to add a new funding source for and select Copy Row from the popup menu (Figure 24). (Note: Copied rows will appear in the last row of data. If you have many rows, you may need to scroll down.)

#	HOME_DEPARTMENT *	POSITION *	EMPLOYEE_ID	RCD	EMPL_NAME	FUNDING DE
1	013000 - Business Services	00051108	000068121	0		013000 - Bus
2	013000 - Business Services	00051108	000068121	0		017000 - FSU
3	Total					

Showing rows 1-2 of 2.

Clear

Add Row

Copy Row

Figure 24 Copy an existing row for the position you wish to split-fund.

- 2) Adjust the funding department and fund associated with the copied row (Figure 25).

FUNDING DEPARTMENT	AREA	SCHOOL	FUND *
013000 - Business Services	013 - Busi...	FIN - AVP Financ...	320
017000 - FSUCard Center	017 - Bus ...	FIN - AVP Financ...	110
017001 - FSUCard Center Auxiliary	017 - Bus ...	FIN - AVP Financ...	320

Figure 25 Adjust the copied row to the correct funding and distribution.

- 3) Finally, adjust the funding distribution percentages accordingly. The total distribution should add up to precisely 100% (Figure 26).

PAY_TYPE	SALARY	SAL ADJ %	ADJUSTED SALARY	DIST %
Base Pay	75,987.79	0.0000%	75,987.79	5.000%
Base Pay	75,987.79	0.0000%	75,987.79	80.000%
Base Pay	75,987.79	0.0000%	75,987.79	15.000%
				100.000%

Figure 26 Adjust the original funding distribution(s) to the correct funding distribution. Total funding should always add up to 100%.

- 4) Click the save (diskette) icon to save your changes.

Add/Remove Employee to/from a Position

To add or remove an employee to/from a position, adjust the employee ID in the associated position. Note: If the position is split funded, you must change each row.

- 1) To add an employee to a vacant position, you can either enter the Employee ID directly into the cell or select the down arrow next to the Employee ID and a search box will appear with the employee's name in the description (Figure 27). Once you've made your changes, click the save (diskette) icon in the toolbar.

POSITION *	EMPLOYEE_ID	RCD	EMPL_NAME	FUNDING DEPARTMENT	AREA
00053866	000056438	U		069000 - Earth, Ocean ...	069 - Ea
00053872	000006162	0		069000 - Earth, Ocean ...	069 - Ea
00053909	000000000	x	Vacant	069000 - Earth, Ocean ...	069 - Ea
00053913					
00055297	000061981				
00054031					
00054032					
00054038					
00057708					
00057746					
00055558	000061981		Employee ID		Clockner, Kenneth

Figure 27 Select the down arrow next to the Employee ID you wish to change.

- 2) To make a position vacant, change the employee ID to "000000000." To make a position "To Be Hired", change the employee ID to "999999999." See Figure 28.

POSITION *	EMPLOYEE_ID	RCD	EMPL_NAME	FUNDING DEPARTMENT	AREA
00058194	000025230	0		069000 - Earth, Ocean ...	069 - Earth
00058393					
00056826	000000000				
00056827					
00058507					
00058508					
00056794					
00058398					
00057727					
00057750					

Dimension Values	Location	Description
000000000	Employee_ID	Vacant

Figure 28 Select the desired Employee ID and click Save.

Add/Remove an Additional Pay

To add an additional pay, copy an existing base pay row, adjust the pay type, and salary amount. To remove an additional pay, simply delete the additional pay row.

- 1) Right-click on the position you wish to add an additional pay to and select Copy Row (Figure 29).

HOME_DEPARTMENT *	POSITION *	EMPLOYEE_ID
069000 - Earth, Ocean & Atmospheric Sci	00053909	000000000
069000 - Earth, Ocean & Atmospheric Sci	000539	
Total		

Showing rows 1-1 of 1.	Clear
	Add Row
	Copy Row
	Delete Row
	Row Details

Figure 29 Copy an existing row of the position you wish to add an additional pay to.

- 2) Change the pay type and salary amount associated with the copied row to the desired values (Figure 30). Click the save (diskette) icon in the toolbar to save your changes.

PAY_TYPE	SALARY	SAL ADJ %	ADJUSTED SALARY	DIST %	COMP / D
Base Pay	111,896.00	0.0000%	111,896.00	100.000%	111
ADS	15,000.00	0.0000%	111,896.00	100.000%	111

Dimension Values	Description
(None)	
All	
Base Pay	
ADS	
SF1	
SF5	
SFN	

Figure 30 Change the Pay Type to the desired additional pay.

- 3) To delete an additional pay, right-click on the specific row associated with the additional pay and select Delete Row (Figure 31). Once the row has been deleted, click the save (diskette) icon in the toolbar to save your changes.

POSITION *	EMPLOYEE_ID	RCD	EMPL_NAME	PAY_TYPE	SALARY	SAL
00053909	000000000	x	Vacant	Base Pay	111,896.00	0
00053909	000000000	x	Vacant	ADS	15,000.00	0

Clear
Add Row
Copy Row
Delete Row

Figure 31 Right-click on the existing additional pay row you wish to delete and click Delete Row.

Reviews & Reports

The Reviews & Reports tab provides a guided self-review. Once you have completed all your anticipated changes to Position Budgeting and/or Position Transfers, select the Reviews & Reports tab for 6 items to review (Figure 32). Scroll down on the tab to see all 6 items. Use the ribbon to isolate specific home departments, funding departments, salary types, fund types, or filled/vacant status.

Reviews & Reports

Once you've completed your entry, use this tab to complete some important reviews. Use the selectors in the ribbon above to filter the data below.

1. Balancing E&G Rate

All E&G-funded positions must be balanced to your E&G salary allocation. (NOTE: E&G benefits can be ignored for this process.)

Use the widgets, in combination with the filters on the ribbon above, to review your departments and their funding. Faculty and staff are balanced separately. And please keep in mind at which level your unit is balanced (e.g., for the entire college/school, area, or department level).

Use the [Comparison of E&G Salary Totals](#) report to view all your departments at once. (NOTE: You must select your individual Division, School, Area, and/or Level that you have access to before running the report.)

Total Position Rate (E&G Only)

\$603,545.68

← FY2026 ↓

Total Salary Allocation (E&G Only)

\$603,546

← FY2026 ↓

2. Recurring Non-E&G Positions

Did you review all the rows where the "Recurrence" column is set you "Recurring" to ensure they're on an E&G fund?

Use the sheet on the right to see any positions listed as "Recurring" on Non-E&G funds. If there are any positions, please adjust the funding or the recurrence. If there are no errors, the sheet on the right should have no rows.


#	HOME DEPARTMENT	POSITION	EMPLOYEE_ID	RCD	EMPL_NAME	FUNDING DEPARTME...	AREA	SCHOOL	RATE_TRACKING_UNIT	FUND	FUND DE.	FUND TY.	PR
1	Total												

Showing rows 0 of 0.

Total row currency values shown in USD - United States of America, Dollars

Figure 32 Use the Reviews & Reports tab to check your Position Budgeting changes.

Some of the reports linked on the Review & Reports tab are **error reports**. In other words, if the report has no results, that means there are no errors. In that case, you will see a sad clipboard icon (Figure 33):



You have suppressed rows, columns, or both with all zeros or blanks. To view data, select new parameters, change report properties, or modify report.

Figure 33 When there are no results, the report will display a sad clipboard.

Display Options and Filters

Adaptive Planning supports filtering and display options. This section will use Position Budgeting as the basis for examples, but the same principles apply to any Sheet with Display Options and Filters.

The tools for Display Options and Filters can be found in the toolbar at the top right of any sheet (Figure 34). In the screenshot below, there are buttons to (1) Filter, (2) Display Options, and (3) Sheet Menu. Detailed explanations of each are provided below the screenshot.

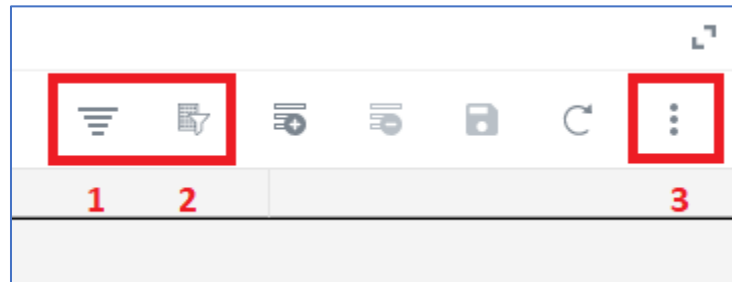


Figure 34 Display Options can be found in the toolbar above any sheet.

1. **Filter:** This tool is used for simple/quick filtering.
2. **Display Options:** This button provides a tool for detailed filters.
3. **Sheet Menu:** A menu all sheet options

Display Options are a valuable tool for filtering data with specific criteria. The tool can use multiple arguments for multiple columns of data. The Column field is used to select the column, Comparison Type is the type of argument (e.g., Begins With, Contains, Less Than, etc.), and the value is the criteria value. You may add multiple “AND” filters by clicking the plus button to the right of the Value field. Alternatively, you can add numerous “OR” filters by clicking the “Add Group” button. See Figure 35 for a screenshot.

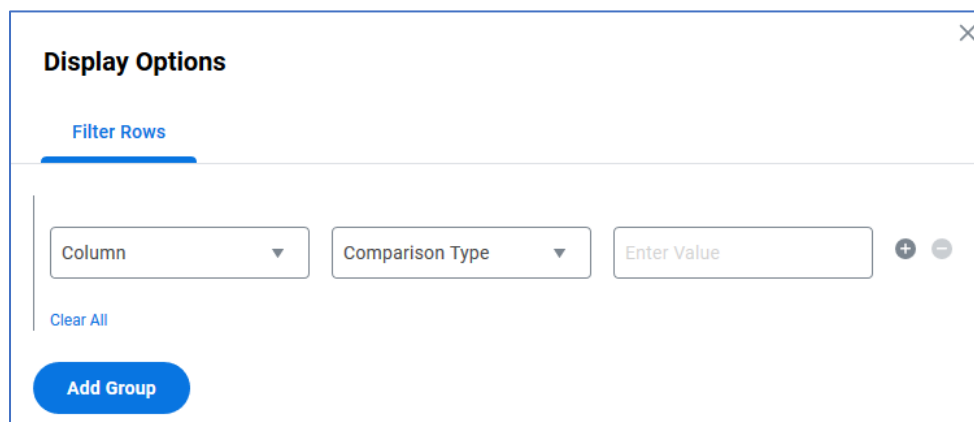


Figure 35 Display Options can be found in the toolbar above any sheet.

Using Position Budgeting as an example, if you want to filter for all positions funded within the College of Arts & Sciences, the criteria would be as depicted in Figure 36.

The screenshot shows a 'Display Options' dialog box with a close button in the top right corner. Under the 'Filter Rows' section, there is a single filter row. It consists of three dropdown menus: 'School', 'is', and 'AS - College of Arts ...'. To the right of the third dropdown are plus and minus icons. Below the filter row is a 'Clear All' link and a blue 'Add Group' button.

Figure 36 Display Option settings to view the College of Arts & Sciences.

If you want to see all faculty positions within the College of Arts & Sciences, you will need to click the plus button to the right of the Value field and add a new row of “AND” criteria. (NOTE: Please note the “AND” in grey text between the two filter criteria.) That filter is depicted in Figure 37.

The screenshot shows the 'Display Options' dialog box with two filter rows. The first row is 'School is AS - College of Arts ...'. Below it, the word 'AND' is displayed in grey text. The second row is 'Pay Plan is Faculty'. Each row has plus and minus icons to its right. At the bottom, there is a 'Clear All' link and a blue 'Add Group' button.

Figure 37 Display Option settings to view only faculty in the College of Arts & Sciences.

Alternatively, if you wish to see all positions within the College of Arts & Sciences “OR” the College of Human Sciences, you must click the “Add Group” button and add a new row of “OR” criteria.

Reports

During the Operating Budget Entry Window, a variety of reports are available. You can also create your own reports, modify existing reports, or request new reports from the Budget Office.

You can navigate to the Reports by clicking the “hamburger” icon at the top left of the screen, clicking the arrow next to Reports, and selecting “Overview.” Select “Shared” on the left to view all shared reports. See Figures 38 and 39 below.

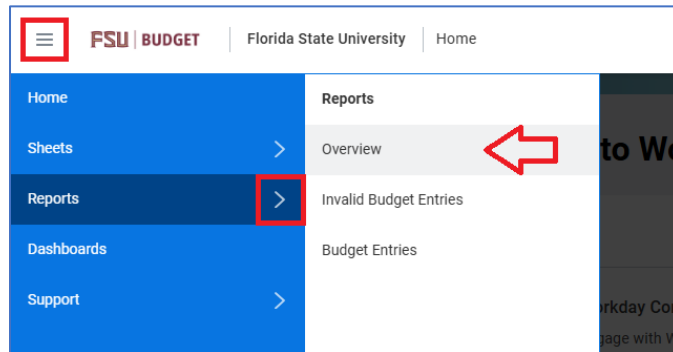


Figure 38 Select the “hamburger” icon in the top left, then “Reports,” then “Overview” from the left-side menu.

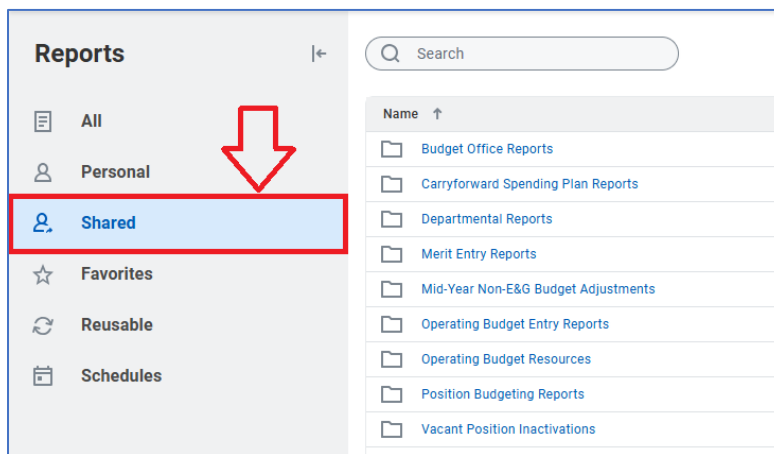


Figure 39 On the left, select “Shared” to view all shared reports. The reports are organized into folders.

Depending upon the report, specific prompts may need to be selected to return data. Please refer to the Budget Office’s website for the relevant job aids for particular details about individual reports. Also, please be aware that there is an option for end-users to create/modify personal reports. That topic is also covered in a separate job aid available on the Budget Office’s website.

Use the “Search” field at the top to find a particular report and its location (Figure 40).

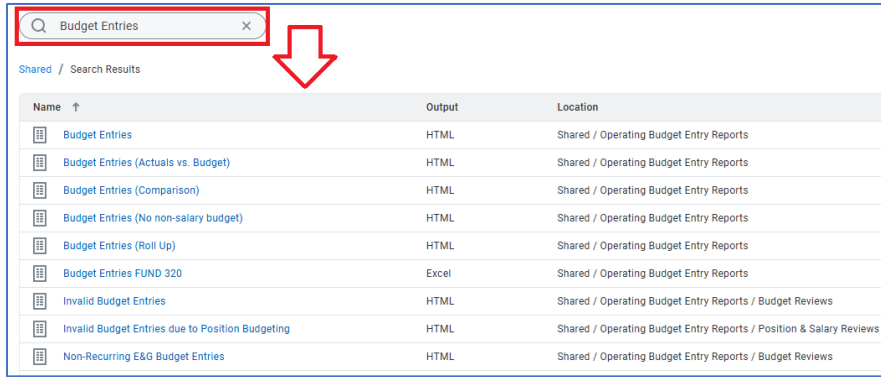


Figure 40 Use the search field to quickly find reports you are looking for.