Adaptive Planning
Position Budgeting Manual

Table of Contents

General Notes ..................................................................................................................................................................... 2
Sheets and Dashboards ................................................................................................................................................. 2
Versions ........................................................................................................................................................................... 2
Position Budgeting by Home Department ................................................................................................................ 2
Levels ................................................................................................................................................................................ 2
Preferences ...................................................................................................................................................................... 3
Confidentiality ................................................................................................................................................................. 3
Text and Cell Styles ........................................................................................................................................................ 4
Getting Started .................................................................................................................................................................... 4
Browser Compatibility ................................................................................................................................................... 4
Login ................................................................................................................................................................................. 4
Position Budgeting .............................................................................................................................................................. 5
Overview .......................................................................................................................................................................... 5
Position Transfers .......................................................................................................................................................... 7
Changes to positions/employees ................................................................................................................................. 9
  Add a “To Be Hired” position ................................................................................................................................ 9
  Change properties .................................................................................................................................................... 11
Transfer a position to a different home department .......................................................................................... 12
Zero out a position .................................................................................................................................................. 13
Change base pay or additional pay amount ......................................................................................................... 14
Change existing funding distribution .................................................................................................................... 15
Add a new funding distribution ............................................................................................................................. 15
Add/Remove employee to/from a position ....................................................................................................... 16
Add/Remove an additional pay ............................................................................................................................ 18
Display Options and Filters ............................................................................................................................................ 20
Reports .............................................................................................................................................................................. 22
General Notes

The following section includes some general information about FSU’s implementation of Adaptive Planning and some summary explanations of critical components of how Adaptive Planning (ADP) works.

Sheets and Dashboards

Within ADP, you will use two primary means of interacting with and entering data: Sheets 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 across multiple tabs.

Versions

The system uses Versions to keep separate data sets within Adaptive Planning (ADP). Versions separate datasets by purpose or time frame related to a specific activity. For example, a Version for the 2022-23 Operating Budget Entry encompasses both Position Budgeting and Budget Entry. There are also Versions for individual pay periods for rate tracking purposes.

The system has a default Version, but you may have access to other versions with the menu in the top-right corner of the ADP screen. The system will remember your preferred Version after entering data and saving it. See below for a screenshot of the Version selection.

Position Budgeting by Home Department

Home Departments are used to control access to view/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.

Levels

Within OMNI Financials, Budget Preparer designations are made for individual Department IDs. These designations are reflected within Adaptive Planning (ADP) as “Levels.” For example, if John Smith is the Budget Preparer for Department 123000, his Levels will include Department 123000. (NOTE: There is an essential distinction between Home Departments and Funding Departments. Please see the previous section for more details.) Outside of Position Budgeting, Levels act as a security/access mechanism for Budget Entry and identify the Department ID within FSU’s department tree hierarchy.
Depending upon the Sheet or Dashboard you are using or the specific department you are entering the budget for, you may need to change your Level selection in the blue ribbon below the top of the screen. On some Sheets, the selection is made on the right side of the blue ribbon (below Version selection) or in the middle of the blue ribbon. See below for screenshots.

Figure 1 Some sheets have the Level selection on the right side of the ribbon.

Figure 2 On Dashboards, the Level selection is typically in the middle of the ribbon.

Preferences

Adaptive Planning will save a multitude of 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. Use the “Reset to Default View” option in the toolbar to reset any display options or filters currently enabled. Please keep these preference settings in mind when navigating the system.

Confidentiality

As an FSU employee, you may have access to Protected or Private information of other employees. This information should be held as highly confidential and should not be discussed, used, or disclosed for purposes outside of your legitimate scope of work. For reference, please see HR’s Confidentiality Statement: https://hr.fsu.edu/sites/g/files/upcbnu2186/files/PDF/Forms/employment/Confidentiality.pdf
Text and Cell Styles

Adaptive Planning uses a variety of text and cell colors to indicate the source, status, or requirements 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 OMNI Financials). Grey cells are locked, and blue cells are unlocked but associated with total/roll-up values.

<table>
<thead>
<tr>
<th>Font Style</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Black</td>
<td>Saved values</td>
</tr>
<tr>
<td>Green</td>
<td>Actuals</td>
</tr>
<tr>
<td>Blue</td>
<td>Unsaved values</td>
</tr>
<tr>
<td>HEADER*</td>
<td>Required cell</td>
</tr>
<tr>
<td>Bold</td>
<td>Totals/Roll-up values</td>
</tr>
</tbody>
</table>

Getting Started

The following section provides instructions for browser compatibility, logging in to Adaptive Planning, and user preferences.

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. 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 Adaptive Planning portal or myFSU (both via CAS/SSO). The direct URL to the Adaptive Planning portal is:


Alternatively, you may log in via the myFSU portal and use the ADP icon provided there.
Position Budgeting

Overview

All changes to positions are done on the Position Budgeting Sheet within Adaptive Planning. For example, changing the incumbent in a position, changing the base pay of a position, benefits, or funding distribution are all changes that may be made on the Position Budgeting Sheet. The one exception is for Position Transfers which is used for transferring positions to a different Home Department. An overview of the Position Transfers Sheet is included in the next section.

You can navigate to the Position Budgeting Sheet by clicking the Workday W at the top-left of the screen, clicking the arrow next to Sheets, and selecting “Position Budgeting” from the menu. Below is a screenshot.

The Position Budgeting Sheet will be limited to only those positions associated with the Home Department for which you are the Salary Preparer. The list will contain all the positions related to your Home Departments and their various funding sources. It is essential to keep in mind that you may control a position whose funding is under the purview of some other individual(s).
Position Budgeting contains many data elements necessary to the budgeting process, but many more are not. The system includes these additional details to assist you with your position budgeting processes.

Following the column for row number on the far left, the following five columns are for Home Department, Position, Employee ID, Employee Record, and Employee Name. (NOTE: These columns are frozen and will remain visible even when scrolling to the right.)

Please keep in mind that the values in the Home Department column are dependent upon your designations as Salary Preparer. For example, suppose you are the Salary Preparer for home department 123000. Only
positions associated with that home department will be displayed, and only that department will be listed in the Home Department column.

Further to the right, you can see a position’s Funding Department, Funding Area, Funding School, Fund Code, Fund Code Description, Fund Type, Project, Project Description, and many other data elements.

Above the data, there is a blue ribbon that provides various options: (1) Show/hide formula bar, (2) Formula Assistant, (3) Save, (4) Download, (5) Add Row, (6) Delete Row, (7) Copy Formulas Mode, (8) Reset to Default View, (9) Display Options, (10) Refresh Sheet, and (11) Filter.

Please see the Display Options and Filters section for more information.

**Position Transfers**

The Position Transfers Sheet is used exclusively to document or request a position transfer between home departments. If a position needs to be moved from one home department to another, the transfer needs to be initiated on the Position Transfers Sheet.

You can navigate to the Position Transfers Sheet by clicking the Workday W at the top-left of the screen, clicking the arrow next to Sheets, and selecting “Position Transfers” from the menu. Below is a screenshot.
The Position Transfers Sheet provides a place to enter transfers between home departments. In the screenshot below, a user has entered a request to transfer position 00051001 from one home department (001000 – President’s Office) to another (001009 – Student Veterans Center). There are additional columns for Home Department designation (yes or no), Status, and Comments.

Please keep in mind that the values in the “Position” and “From Home Department” columns depend on your Salary Preparer designations. For example, if you are the Salary Preparer for home department 123000, only positions associated with that home department will be displayed.

For detailed step-by-step instructions on making a transfer, please see the transfer a position to a different home department section.
Changes to positions/employees
Except for transferring positions, all changes that can be made to a position will be made on the Position Budgeting sheet. 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” position
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 row with similar characteristics rather than adding a new row from scratch. This section will describe the copy row method.

1) Right-click on the row you wish to copy and select “Copy Row” from the drop-down menu to copy an existing row. (Alternatively, you can click the “add row” icon in the blue toolbar to create a blank row).

The copied row will be added to the bottom of the visible rows. The blue text indicates the data has not been saved.
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.

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.
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 properties**

To change the properties of a position, make your changes within the desired rows. The specific element(s) that you’ve changed will turn 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 Health Insurance plan, hover over the cell you wish to change, left-click the down arrow, and select the new health insurance plan from the menu. Once you’ve made your changes, click the save (diskette) icon.
Alternatively, for amounts, type the new value into the cell. Below is a change to FTE.

<table>
<thead>
<tr>
<th>Code</th>
<th>Title</th>
<th>Full Time</th>
<th>FTE</th>
<th>FTE</th>
<th>FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>90019S</td>
<td>Professor 9 Mo SAL</td>
<td>1.0000</td>
<td>1.0000</td>
<td>20E</td>
<td></td>
</tr>
<tr>
<td>90029S</td>
<td>Asst Professor 9 Mo SAL</td>
<td>1.0000</td>
<td>1.0000</td>
<td>20E</td>
<td></td>
</tr>
<tr>
<td>90039S</td>
<td>Asst Professor 9 Mo SAL</td>
<td>1.0000</td>
<td>1.0000</td>
<td>20E</td>
<td></td>
</tr>
<tr>
<td>90019S</td>
<td>Professor 5 Mo SAL</td>
<td>1.0000</td>
<td>1.0000</td>
<td>20E</td>
<td></td>
</tr>
<tr>
<td>90029S</td>
<td>Asst Professor 9 Mo SAL</td>
<td>1.0000</td>
<td>1.0000</td>
<td>20E</td>
<td></td>
</tr>
<tr>
<td>0114</td>
<td>Office Administrator</td>
<td>1.0000</td>
<td>1.0000</td>
<td>31E</td>
<td></td>
</tr>
<tr>
<td>90019S</td>
<td>Professor 5 Mo SAL</td>
<td>1.0000</td>
<td>1.0000</td>
<td>20E</td>
<td></td>
</tr>
<tr>
<td>9063AS</td>
<td>Teaching Faculty 12 Mo S...</td>
<td>0.5000</td>
<td>1.0000</td>
<td>20E</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>22.5000</td>
</tr>
</tbody>
</table>

Note: If a position is split funded, please make sure all applicable rows are adjusted.

Transfer a position to a different home department
To transfer a position to a different home department, you will need to navigate to the Position Transfer sheet. 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) Navigate to the Position Transfers sheet.
2) Click the Add Row icon in the toolbar to create a new row.
3) 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. Once you’ve made your entries, click the save (diskette) icon in the toolbar.

4) If the To Home Department is within your control, you may navigate back to the Position Budgeting sheet 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 setting the salary to $0.00 and changing the health and life insurance selections to None and No, respectively.

1) For the position/row(s) you wish to zero out, change the Salary amount to $0.00.

2) Scroll to the right and change the Health Plan and Life Insurance plan to None and No, respectively.
3) Click the save (diskette) icon in the toolbar.

Note: It is not recommended to delete rows from the Position Budgeting sheet. If you mistakenly click this icon, it will prompt you to confirm before the deletion.

Change base pay or additional pay amount
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.
   (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.

<table>
<thead>
<tr>
<th>SC</th>
<th>PAY_TYPE</th>
<th>SALARY</th>
<th>SAL ADJ %</th>
<th>ADJUSTED SALARY</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Base Pay</td>
<td>76,120.97</td>
<td>0.0000%</td>
<td>76,120.97</td>
</tr>
<tr>
<td></td>
<td>Base Pay</td>
<td><strong>200,000.00</strong></td>
<td>0.0000%</td>
<td>181,533.84</td>
</tr>
<tr>
<td></td>
<td>ADS</td>
<td>23,274.00</td>
<td>0.0000%</td>
<td>23,274.00</td>
</tr>
<tr>
<td></td>
<td>Base Pay</td>
<td>174,513.69</td>
<td>0.0000%</td>
<td>174,613.69</td>
</tr>
</tbody>
</table>

Note: Base pay amounts need to reflect the FTE. For instance, if a position has a base pay of $100,000 at 1.0 FTE and the position moves to 0.5 FTE, then the salary will need to be adjusted to $50,000 accordingly.

2) Once you’ve made your changes, click the save (diskette) icon in the toolbar.
Change existing funding distribution
This section will provide step-by-step instructions for changing the funding distribution of a current split funded position. For adding a new funding split, see the next section for details.

1) 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%. Click the save (diskette) icon to save your changes.

<table>
<thead>
<tr>
<th>PAY_TYPE</th>
<th>SALARY</th>
<th>SAL ADJ %</th>
<th>ADJUSTED SALARY</th>
<th>DIST %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base Pay</td>
<td>78,000.00</td>
<td>0.0000%</td>
<td>78,000.00</td>
<td>100.000%</td>
</tr>
<tr>
<td>Base Pay</td>
<td>52,000.00</td>
<td>0.0000%</td>
<td>52,000.00</td>
<td>100.000%</td>
</tr>
<tr>
<td>Base Pay</td>
<td>42,864.00</td>
<td>0.0000%</td>
<td>42,864.00</td>
<td>100.000%</td>
</tr>
<tr>
<td>Base Pay</td>
<td>125,000.00</td>
<td>0.0000%</td>
<td>125,000.00</td>
<td>100.000%</td>
</tr>
<tr>
<td>Base Pay</td>
<td>75,987.79</td>
<td>0.0000%</td>
<td>75,987.79</td>
<td>10.000%</td>
</tr>
<tr>
<td>Base Pay</td>
<td>75,987.79</td>
<td>0.0000%</td>
<td>75,987.79</td>
<td>90.000%</td>
</tr>
</tbody>
</table>

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. (Note: Copied rows will appear in the last row of data. If you have many rows, you may need to scroll down. If you save after using Copy Row, the copied row will follow the existing displaying order.)

2) Adjust the funding department and fund associated with the copied row.
3) Finally, adjust the funding distribution percentages accordingly. The total distribution should add up to precisely 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, select the down arrow next to the Employee ID and enter the new employee’s ID. Click the save (diskette) icon to save.

2) To make a position vacant or change it to a To Be Hired employee placeholder, click on the down arrow next to the Employee ID and select either “000000000” for vacant or “999999999” for a To Be Hired placeholder.
3) When making a position vacant, please adjust the Health Insurance to “Individual Family Average” and Life Insurance to “Yes”. For vacant Faculty and A&P position, please use ORP_OP as the retirement selection. For USPS, please use “FRS_HA”.

4) Click the save (diskette) icon to save.
Add/Remove an additional pay

To add or remove an additional pay, copy an existing row or delete a row.

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

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

**NOTE:** If you are adding a shift differential (SF1/SF5/SFN), you do not need to enter a salary amount. The shift differential will be calculated automatically in the “Adjusted Salary” column.
3) To delete an additional pay, right-click on the specific row associated with the additional pay and select Delete Row. Once the row has been deleted, click the save (diskette) icon in the toolbar to save your changes.
Display Options and Filters

Sheets within Adaptive Planning support robust filtering and display options. This section will use the Position Budgeting Sheet as the basis for examples, but the same principles apply to any Sheet where Display Options and Filters are available.

The tools for Display Options and Filters can be found in the blue ribbon at the top of the screen. In the screenshot below, there is a button to (1) Reset to Default View, (2) Display Options, and (3) Filter. Detailed explanations of each are provided below the screenshot.

- (1) Reset to Default View: This button will reset all display options or filters.
- (2) Display Options: This button provides a tool for detailed filters.
- (3) Filter: This tool is used for simple/quick filtering.

Display Options and Filter are a valuable tool for filtering data with specific criteria. For example, if you are making changes to a specific position, you can use the filter for a single position. Display Options are ideally suited for multiple criteria (e.g., filter for faculty on E&G funds only).

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.
Using the Position Budgeting Sheet as an example, if you want to filter for all positions funded within the College of Arts & Sciences, the criteria would be as follows:

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 would look like the screenshot below.
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**

A variety of reports are available during the Operating Budget Entry Window. You can navigate to the Reports by clicking the Workday W at the top-left of the screen, clicking the arrow next to Reports, and selecting “Overview” or any favorited reports listed on the menu. Below is a screenshot.

![Screenshot of Workday interface with Reports section highlighted]

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.