# Adaptive Planning
## 2023-24 Position Budgeting Manual

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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 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 across multiple tabs.

Versions

The use of Versions keeps datasets separate within Adaptive Planning (ADP). Versions distinguish datasets by purpose or time frame related to a specific activity. For example, the 2023-24 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.

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.](image)

Position 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 View Access by Funding Department

If you are a Budget Preparer, you will have view-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. In other words, 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 view-only access to portions of positions based on their Funding Department.

**Levels**

Within OMNI Financials, Budget Preparer designations are made for individual Department IDs. These designations are reflected within Adaptive Planning (ADP) as “Levels” (see Figure 2). For example, if John Smith is the Budget Preparer for Department 123000, his Levels will include Department 123000. (NOTE: There is an important 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 (see Figure 3). 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 2](image1.png)

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

![Figure 3](image2.png)

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

**Preferences**

Adaptive Planning 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**

Adaptive Planning uses text and cell style/color 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 OMNI 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.

<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>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 (Figure 4).

Figure 4 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.

You can navigate to the Position Budgeting Dashboard by clicking the “hamburger” icon at the top-left of the screen, selecting “Dashboards” (Figure 5), and then selecting “Position Budgeting Dashboard” (Figure 6).

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.

Along the top of the dashboard, there is a blue ribbon that provides some useful ways of filtering your data (Figure 7). (NOTE: Selections for Time and Currency should never be adjusted.)
Figure 7 The blue ribbon provides an easy and quick means to filter data.

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

There are three tabs on the Position Budgeting Dashboard: (1) Position Budgeting, (2) Position Transfers, and (3) Instructions & Resources. 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. Finally, the Instructions & Resources tab provides some essential information and links to resources (including this user manual) all in one place. See Figure 8 for a screenshot.

Besides using the blue ribbon options to filter data, you can create custom filters using the “Display Options” settings in the toolbar above the sheet (Figure 9). Please see the Display Options and Filters section for more information.
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).

The copied row will be added to the bottom. 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.

![Image showing Health Insurance drop-down menu]

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.
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. Once you’ve made your entries, click the save (diskette) icon in the toolbar.

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 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.

<table>
<thead>
<tr>
<th>SALARY</th>
<th>SAL ADJ %</th>
<th>ADJUSTED SALARY</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>0.00</strong></td>
<td>0.0000%</td>
<td><strong>33,005.08</strong></td>
</tr>
<tr>
<td><strong>53,355.78</strong></td>
<td>0.0000%</td>
<td><strong>53,355.78</strong></td>
</tr>
<tr>
<td><strong>43,803.80</strong></td>
<td>0.0000%</td>
<td><strong>43,803.80</strong></td>
</tr>
</tbody>
</table>

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 tab. 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>ADMIN DESC</th>
<th>WEEKS</th>
<th>HEALTH_PLAN</th>
<th>LIFE_INS</th>
<th>PY</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>52.20</td>
<td>None</td>
<td>No</td>
<td>1.0000</td>
</tr>
<tr>
<td>None</td>
<td>52.20</td>
<td>Individual</td>
<td>Yes</td>
<td>1.0000</td>
</tr>
<tr>
<td>None</td>
<td>52.20</td>
<td>Individual</td>
<td>Yes</td>
<td>1.0000</td>
</tr>
<tr>
<td>None</td>
<td>52.20</td>
<td>Group</td>
<td>Yes</td>
<td>1.0000</td>
</tr>
</tbody>
</table>

2) For split funded positions, be sure to change the base pay on each funding distribution row.

3) 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. **(Note: For adding a new funding split, please see the next section for instructions.)**

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.
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.)

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. Click the save (diskette) icon to 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.

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.
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

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 where Display Options and Filters are available.

The tools for Display Options and Filters can be found in the toolbar at the top right of any sheet (Figure 10). 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.

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 11 for a screenshot.
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 12.

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 13.

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 “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 14 and 15 below.

![Figure 14](image-url) Select the “hamburger” icon in the top left, then “Reports,” then “Overview” from the left-side menu.

![Figure 15](image-url) 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.