# Adaptive Planning
## 2024-25 Budget Entry 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 2024-25 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 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 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.

Outside of Position Budgeting, Levels act as a security/access mechanism for Budget Entry and identify the Department ID within FSU’s department tree.
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 blue ribbon below the top of the screen (see Figure 3).

![Operating Budget Dashboard](image)

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

**Multi-select**

Dashboards and Reports feature multi-select allowing you to choose more than one value from drop-down menus. Currently, this feature does not display sheet data on Dashboards; only widgets will show data when selecting multiple values. When completing your entry, please make sure you have selected a single value in Level, Fund, Home Department, or any other drop-down menu. Otherwise, you will see an error (see Figure 4).

![Multi-select is unavailable for this chart type](image)

*Figure 4 Multi-select does not currently work for sheet data (“Multi-select is unavailable for this chart type”).*

To make selections, use the drop-down menu, check the box next to the value you wish to select, and then click “Apply” at the bottom of the drop-down menu. See Figure 5.
To de-select a value, you can either check and uncheck the topmost value in the drop-down menu (thereby clearing all selections) or go to the “Selected” tab on the drop-down menu, click the X next to any selections to de-select them, and then click “Apply” at the bottom of the drop-down menu. See Figure 6.

**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/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>
<thead>
<tr>
<th>Font/Background Style</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Black Font</td>
<td>Saved values</td>
</tr>
<tr>
<td>Green Font</td>
<td>Actuals</td>
</tr>
<tr>
<td>Blue Font</td>
<td>Unsaved values</td>
</tr>
<tr>
<td>Bold Font</td>
<td>Totals/Roll-up values</td>
</tr>
<tr>
<td>Grey Background</td>
<td>Locked cell</td>
</tr>
<tr>
<td>Blue Background</td>
<td>Totals/Roll-up values (Unlocked)</td>
</tr>
</tbody>
</table>

**Resizing Column Widths**

To quickly auto-resize a column’s width to fit the data/values in the column, double-click the divider in the column header. See Figure 7.

![Figure 7](image)

*Figure 7* 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 as well.
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. 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 8).

Figure 8 Access Adaptive Planning via the calculator icon on the myFSU portal.
Operating Budget Dashboard

Overview
The Operating Budget Dashboard provides a single access point for Budget Entry. From this dashboard, you can view your valid combinations (departments and associated funds), enter budget, other expense budget, non-exchange transfers, and override the non-E&G salary and benefit amounts populated from Position Budgeting. Additionally, there are tabs for important information and a guided, step-by-step review.

Navigation
You can navigate to the Operating Budget Dashboard by clicking the “hamburger” icon at the top-left of the screen, selecting “Dashboards” (Figure 9), and then selecting “Operating Budget Dashboard” (Figure 10).

![Figure 9 Select “Dashboards” from the left-hand menu.](image)

![Figure 10 Select “Operating Budget Dashboard” from the list of available dashboards.](image)

Ribbon
After you’ve opened the dashboard, you will see a blue ribbon at the top and several tabs below those. See Figure 11. The blue ribbon controls your perspective by Department (“Level”) and Fund. Having “Top Level” and “All” funds selected provides an overview of all departments and funds.
Figure 11 The blue ribbon provides an easy and quick means to filter data.

To select a specific division, school, area, or department, select the downward arrow and either select a level from the menu or use the search bar to find a specific level (Figures 12 and 13).

Figure 12 Expand or collapse the department level tree and select a level.

Figure 13 Use the Search bar to search for a level and select it.
**IMPORTANT NOTE:** Currently, multi-select does not work for sheets on Dashboards. If you select more than one level or fund, you will receive the error message “Multi-select is unavailable for this chart type.”

To select a specific fund, use the downward arrow next to Fund and select either “Fund” (which becomes “All” in the ribbon) or an individual fund. See Figure 14.

![Figure 14 Select a specific fund or select “Fund” to select all funds.](image)

On the right-hand side of the Ribbon, there are some options for (1) filters, (2) refreshing, (3) snapshot, (4) grid mode, and (5) presentation mode. See Figure 15.

![Figure 45 The Ribbon also includes other tools to view and filter data.](image)

1. **Filters:** Provides an alternative way to select the Time, Level, Currency, and Fund selections.
2. **Refresh:** Provides the ability to refresh the contents of the tab.
3. **Snapshot:** Provides a way to share a static “snapshot” of the current tab and its contents.
4. **Grid Mode:** Arrange the tab’s contents in a tile view (default view).
5. **Presentation Mode:** Focus on a single widget/sheet while aligning the others vertically on the left.
**Toolbar**

Every sheet view in the Operating Budget Dashboard includes a toolbar (see Figure 16). 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 that may be hidden.

![Department and Fund Tracker](image)

*Figure 5 Every sheet has a toolbar with Filter, Display Options, Add/Remove rows, Save (diskette), and other options.*

**Widgets**

There are a variety of widgets available on the Operating Dashboard. Some of these provide information in charts or individual amounts. Please see the relevant tab section for specific details about a particular widget.
Dashboard Tabs

Combinations Tab

The first tab is the “Combinations” tab. It serves multiple critical functions: (1) A starting point and overview for budget entry, (2) a means to keep notes and track your budget entry progress, (3) a list of all valid combinations that you have access to for budget entry, and (4) identifies the Approver for the level. See Figure 17.

On the Combinations tab, there are several widgets and the “Department and Fund Tracker,” which displays all valid combinations of department and fund associated with your budget preparer designations.

Currently, there are four widgets on the Combinations tab.

1. **Valid Combinations Selected:** A total number of valid combinations based on your selections in the ribbon.
2. **Combinations by Fund Type:** A chart indicating the distribution of combinations by fund type.
3. **Total Budget Entry:** A chart indicating the total budget entered for valid vs. invalid combinations.
4. **Total Department Budget Entry by Fund:** A chart indicating the distribution of budget entry amounts by fund.

**Department and Fund Tracker.** The “Department and Fund Tracker” sheet displayed at the bottom of the Combinations tab provides a list of all current valid combinations, a means to set statuses and add comments, and also see the designated Approver for the particular Level. See Figure 18.

![Image of the Combinations tab in the Operating Budget Dashboard with widgets and Department and Fund Tracker]

Figure 67 The Combinations tab for the Operating Budget Dashboard provides useful information before budget entry.
The Department and Fund Tracker provides a list of valid combinations, statuses, entry amounts, and identifies the Approver.

For instance, if you are the College of Arts & Sciences budget preparer, you will see all valid combinations – department and funds – for the college if you’ve selected “Top Level” and “All” funds in the blue ribbon. As you make adjustments to the selections in the ribbon, you will notice the combinations changing accordingly. Suppose you selected a single department in the “Level” selector, you will only see the valid funds associated with the selected department.

While adding and deleting rows from the Department and Fund Tracker is possible, this will not impact the number of valid combinations. Please contact the Budget Office (budget@fsu.edu) for support if you need to adjust the list of valid combinations (i.e., add a new dept-fund combination).

The tracker can also organize, track, and comment on your budget entries. For instance, if you’re in the middle of budget entry and need to step away, you can set your status to “Pending/In Progress” and add a comment to remind yourself. See Figure 19 for an example.

If you do not intend to request budget for a valid department and fund listed, please use the “No Entry/Request” status to let the Budget Office know that the valid combination has not been erroneously missed. See Figure 20 for a list of status options.

<table>
<thead>
<tr>
<th>#</th>
<th>LEVEL</th>
<th>FUND</th>
<th>FUND_TYPE</th>
<th>STATUS</th>
<th>COMMENT</th>
<th>BUDGET ENTRY</th>
<th>APPROVER</th>
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<tbody>
<tr>
<td>1</td>
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<td>110</td>
<td>ES Funds</td>
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<td></td>
<td>2,248,374</td>
<td>Michael Hardine</td>
</tr>
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<td>2</td>
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<td>140</td>
<td>Carryforward</td>
<td>Awaiting Entry</td>
<td></td>
<td>82,863</td>
<td>Michael Hardine</td>
</tr>
<tr>
<td>3</td>
<td>114000 - Dean College of Business</td>
<td>126</td>
<td>ES Funds</td>
<td>Awaiting Entry</td>
<td></td>
<td></td>
<td>Michael Hardine</td>
</tr>
<tr>
<td>4</td>
<td>114000 - Dean College of Business</td>
<td>802</td>
<td>Capital Proc.</td>
<td>Awaiting Entry</td>
<td></td>
<td></td>
<td>Michael Hardine</td>
</tr>
<tr>
<td>5</td>
<td>114000 - Dean College of Business</td>
<td>121</td>
<td>ES Funds</td>
<td>Awaiting Entry</td>
<td></td>
<td>299,107</td>
<td>Michael Hardine</td>
</tr>
<tr>
<td>6</td>
<td>114000 - College of Business General</td>
<td>140</td>
<td>Carryforward</td>
<td>Awaiting Entry</td>
<td></td>
<td></td>
<td>Michael Hardine</td>
</tr>
<tr>
<td>7</td>
<td>114001 - College of Business General</td>
<td>110</td>
<td>ES Funds</td>
<td>Awaiting Entry</td>
<td></td>
<td></td>
<td>Michael Hardine</td>
</tr>
<tr>
<td>8</td>
<td>114002 - College of Business Auxilliary</td>
<td>300</td>
<td>Auxiliary Fu.</td>
<td>Awaiting Entry</td>
<td></td>
<td>106,274</td>
<td>Michael Hardine</td>
</tr>
<tr>
<td>9</td>
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<td>300</td>
<td>Auxiliary Fu.</td>
<td>Awaiting Entry</td>
<td></td>
<td></td>
<td>Michael Hardine</td>
</tr>
<tr>
<td>10</td>
<td>114003 - Business Technology Fee</td>
<td>615</td>
<td>Local Funds</td>
<td>Awaiting Entry</td>
<td></td>
<td></td>
<td>Michael Hardine</td>
</tr>
</tbody>
</table>

Figure 7 The Department and Fund Tracker provides a list of valid combinations, statuses, entry amounts, and identifies the Approver.

Figure 8 Use the Department and Fund Tracker to keep notes and statuses.

Figure 20 Set statuses to assist with your entry.
**Invalid Budget Entries.** Invalid budget entry would occur when budget is entered on a department and fund that is not a valid combination. Invalid entries can occur in two ways: (1) Entering amounts on a department and fund combination that’s invalid or, (2) a position in Position Budgeting is funded on an invalid combination.

To identify specific department and fund combinations that have invalid budget entries, please use the “Invalid Budget Entries” report (Reports → Shared → Operating Budget Entry Reports → Budget Reviews). You may run this report by division, school, area, or department.

You will need to review the invalid budget entries and determine whether they are incorrect. If you believe that the department and fund are indeed a valid combination, please contact the Budget Office (budget@fsu.edu). Alternatively, if you believe the entries are invalid, you may remove entries on the Budget Entry tab, override salary and benefit amounts on the Salary & Benefits Adjustment tab, or work with a Salary Preparer to change position budgeting.
Budget Entry Tab

The second tab is for entering your budget request (see Figure 21 for a screenshot). This tab has two primary sheets visible: Balance Estimate and Budget Entry. There are also two widgets visible for Recurring and Non-Recurring Ending Balances.

![Operating Budget Dashboard](image)

*Figure 21 The Budget Entry tab provides essential information for your Budget Entry as well as a means to enter your budget.*

The accounts displayed on the Budget Entry tab are based on your fund selection. Selecting an E&G fund (110, 121, 210, or 211) will adjust the Balance Estimate to display only estimates relevant to E&G funds. Likewise, selecting either a carryforward fund (140, 126, 240, or 241), non-E&G fund (auxiliary, tech fee, etc.), or Foundation fund (599) will adjust the accounts displayed accordingly. Additionally, the Budget Entry sheet will display Recurring and Non-recurring budgetary and sub-budgetary accounts.

Since only E&G funds may be recurring, only by selecting an E&G fund will you see a separate set of budgetary and sub-budgetary accounts for Recurring and Non-Recurring within the Budget Entry pane. Any other selection for the fund will be limited to just Non-Recurring budgetary and sub-budgetary accounts.

**Balance Estimate**

The estimates listed on the Balance Estimate pane are contextually based on your Fund selection. By selecting a specific fund code in the blue ribbon, you will see balance estimate accounts specific to that fund code.

**E&G Funds.** In Figure 22, an E&G fund is selected, and therefore the estimates displayed are specific to that E&G fund. For E&G funds, amounts are broken out for E&G Rate, E&G Benefits, and Non-Salary. Note that there are two columns for Recurring and Non-Recurring amounts.
For E&G funds, the E&G rate allocation and budgeted E&G rate use should net zero either at the department, area, school, or division level. For instance, if you’re the Budget Preparer for the College of Arts & Sciences, you may have individual departments that are “out of balance,” but the E&G rate allocation and rate use nets zero at the college overall.

The amounts for E&G benefits may be generally ignored as they will be out of balance until the Budget Office completes a reconciliation process.

Total Non-Salary Allocation Remaining indicated the difference between the Total Adjusted Non-Salary Allocation and the Total Non-Salary Expense budget requested. If there is a remaining positive amount, you may wish to enter an additional budget or offset it by another department within the Division, College, or Area.

**Carryforward Funds.** In Figure 23, a Carryforward Fund is selected. The Balance Estimate accounts specifically related to Carryforward Funds are displayed. There is a single column for Non-Recurring amounts.

The E&G available balance is added to the E&G carryforward available balance for a Total Available Balance as of 03/31. Since some current-year E&G funds roll to carryforward, the balance estimate for carryforward includes E&G available balance. Details are provided for which amounts are included and excluded.
Budget Preparers may also make adjustments for Estimated Revenues and Transfers In and Estimated Unencumbered Expenses & Transfers Out.

**Non-E&G Funds.** In Figure 24, a Non-E&G Fund is selected. The Balance Estimate accounts specifically related to Non-E&G Funds are displayed. There is a single column for Non-Recurring amounts.

The Fund Balance is provided as of 03/31 less Encumbrances. Users can include any estimated revenues or transfers in, or estimated unencumbered expenses or transfers out for April through the remainder of the fiscal year (June 30).

![Figure 24 Non-E&G funds are only non-recurring. Balance Estimates display amounts relevant only to non-E&G.](image)

**Foundation Funds.** In Figure 25, a Foundation Fund is selected. The Balance Estimate accounts specifically related to Foundation Funds are displayed. There is a single column for Non-Recurring amounts. The Balance Estimate accounts are for the Revenue and Expense entry totals followed by a difference.

![Figure 25 Foundation funds are only non-recurring. Balance Estimates display amounts relevant only to Foundation.](image)

**Budget Entry**

The Budget Entry sheet provides a list of all relevant budgetary and sub-budgetary accounts and the ability to enter your budget request amounts. Note that the accounts are collapsible and follow their respective hierarchies for sub-budgetary and budgetary accounts. Furthermore, the account structure rolls up separately for recurring and non-recurring (Figure 26). It is essential to keep this in mind when viewing your entries, particularly for E&G funds that are typically recurring, whereas non-E&G funds are always non-recurring. When entering your E&G budget, please review whether you’re entering values as **Recurring** or **Non-Recurring**.
Type or copy and paste values into the white cells to enter the budgeted amount. Grey cells are read-only cells. However, you may copy and paste values from read-only cells. Unsaved values are denoted by *blue* text, and actuals are denoted with *green* text. Click the save (diskette) icon in the toolbar to save your entry. See Figure 27 for an example.

**IMPORTANT NOTES:** There are several budgetary and sub-budgetary accounts that are grey (read-only). These are the Salary and Benefits (710xxx) accounts, Other Expense (740017), and Transfer (78xxxx) accounts. Amounts for these locked accounts may only be entered via their respective tabs. Please see the sections covering Other Expenses, Transfers, and Salary & Benefit Adjustments for details.

There are a variety of tools available for entering and notating your budget. By right-clicking on a cell, you can Copy Forward, Copy Downward, Adjust, Add Note, Explore Cell, and Display Options (Figure 28).
• **Copy Forward:** This tool is not currently relevant to FSU’s implementation of Adaptive Planning as it applies to multiple periods (e.g., months or quarters).

• **Copy Downward:** This tool copies a value downward to the end. It may be helpful in certain situations, but it is generally not recommended for the Budget Entry sheet.

• **Adjust:** This tool allows you to adjust an individual or a range of values systematically. Select an individual or range of cells and use the popup box to adjust the values proportionally, evenly, or apply some individual value or percentage changes.

• **Add Note:** This tool allows you to enter notes for a specific cell. These notes can also be referenced in reports.

• **Explore Cell:** This tool provides some additional details about the cell. If the cell’s value is derived by a formula or from the value of another sheet or cells, the Explore Cell details would indicate those.

• **Display Options:** This tool adjusts display options (same as the Display Options on the toolbar).

**Breakback Methods**

As an alternative to entering values at the sub-budgetary account level, you can enter totals at the budgetary account level and “breakback” in a variety of ways. By default, you can breakback proportionally or evenly (see Figure 29). Enter a value in a blue-shaded cell and press enter to start this process. A popup box will provide you with breakback method options.

Suppose you wish to budget some value proportionally based on prior year actuals. In that case, you’ll first need to copy and paste the prior year’s actuals into the associated cells for the budget year (Figure 30).
Once you’ve copied and pasted the prior year’s actuals, you can change the value in the blue shaded cell to the total you wish to budget and use the “Proportionally” option to budget your total amount based on the prior year’s actuals (Figure 31).

See Figure 32 for the final result of proportionally budgeting $320,000 based on prior year actuals.
Figure 32 The amounts have been proportionally distributed based on last year’s actuals.

Another approach would be to enter amounts that add up to 100 to simulate a percentage distribution. Once you’ve entered the total you want to breakback in the blue cell, it will be distributed accordingly (Figure 33).

Figure 33 To simulate a distribution percentage, enter values adding up to 100 and then use the breakback method to distribute proportionally.

Below is a screenshot of $320,000 being distributed proportionally based on a simulated percentage (Figure 34).
Figure 34 The breakback amount has been distributed proportionally based on the “percentages” entered.

<table>
<thead>
<tr>
<th>Description</th>
<th>Budget Exp</th>
<th>Budget Exp</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>740001 - Budget Exp-Proft/Other Serv</td>
<td>2,085.40</td>
<td>299,448.70</td>
<td>320,000.00</td>
</tr>
<tr>
<td>740002 - Budget Exp-Chartered Travel</td>
<td>970.00</td>
<td>2,720.88</td>
<td>9,200.00</td>
</tr>
<tr>
<td>740003 - Budget Exp-Print/Reproduction</td>
<td>8,047.44</td>
<td>1,167.60</td>
<td>16,000.00</td>
</tr>
<tr>
<td>740004 - Budget Exp-Subsidient</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>740005 - Budget Exp-Travel</td>
<td>40,648.31</td>
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</tr>
<tr>
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<td>16,000.00</td>
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<tr>
<td>740007 - Budget Exp-Utilities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>740008 - Budget Exp-Repair/Maint/Rep</td>
<td>1,108.00</td>
<td>1,674.00</td>
<td>9,200.00</td>
</tr>
<tr>
<td>740009 - Budget Exp-Maint IT Software</td>
<td>1,400.15</td>
<td></td>
<td>22,400.00</td>
</tr>
<tr>
<td>740011 - Budget Exp-Consumable Supplies</td>
<td>6,059.00</td>
<td>15,235.72</td>
<td>22,000.00</td>
</tr>
<tr>
<td>740012 - Budget Exp-Equip/Oth Supplies</td>
<td>193.93</td>
<td>182.41</td>
<td>48,000.00</td>
</tr>
<tr>
<td>740013 - Budget Exp-Postal/Freight</td>
<td>143.93</td>
<td>469.85</td>
<td>6,400.00</td>
</tr>
<tr>
<td>740014 - Budget Exp-Insurance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>740015 - Budget Exp-Rental</td>
<td>1,000.00</td>
<td></td>
<td>22,400.00</td>
</tr>
<tr>
<td>740016 - Budget Exp-Financial Aid</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>740017 - Budget Exp-Other Exp</td>
<td>126.00</td>
<td>1,588.95</td>
<td>320,000.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>250,009.56</td>
<td>473,719.84</td>
<td></td>
</tr>
</tbody>
</table>
Other Expense Tab

The Other Expense tab is for entering budget for the Other Expense sub-budgetary account (740017). The Other Expense sub-budgetary account (740017) is locked on the Budget Entry tab and requires that you enter via the Other Expense tab. When budgeting for Other Expense, you'll need to identify the general ledger account that will be used for the expenses. Additionally, you must include an adequate explanation for the expenses. See Figure 35.

Figure 35 The breakback amount has been distributed proportionally based on the “percentages” entered.

To enter Other Expense budget, click the Add Row button in the toolbar above the sheet. See Figure 36.

Figure 36 Add a row using the Add Row button in the toolbar.
Select the Level (if the column is not on the sheet, it will automatically follow the selection you made in the blue ribbon), Fund, GL Account code, Recurrence (i.e., Recurring or Non-Recurring), enter a detailed explanation for the Other Expense, and the budget amount. See Figure 37.

![Other Expense Table]

Figure 37 Enter values in each available column. Make sure to include an explanation for each GL account.

The blue values let you know the value is unsaved, so click the Save (diskette) icon in the toolbar to save. The values should turn black to let you know the data is saved.
Transfers Tab

The third tab is for entering non-exchange transfers and viewing any overhead assessment amounts. See Figure 38.

Figure 148 The Transfers tab provides an option to view and enter non-exchange transfers.

Transfer Requests are entered by adding a row and selecting the transfer accounts, amounts, and the department you are transferring to/from (Figure 39). Several widgets provide high-level details associated with transfers and a Transfer Request sheet for entering your transfers.

Figure 159 Enter non-exchange transfers for the upcoming fiscal year via the Transfers tab.

The step-by-step process for entering a non-exchange transfer is as follows:

1. Add a row using the add row icon ( )
2. **Level**: If you already have a specific department selected in the ribbon, skip to step 3.
3. **Fund**: Select a fund.
4. **Transfer Account**: Select a transfer account. If you’re unsure of the account to use, please contact Mary Alice Bullard (m.bullard@fsu.edu) or Ben Spivey (bspivey2@fsu.edu).

5. **Status**: Select the “Requested” status. Once the transfer has been set to “Completed” by the Budget Office, the amount will appear on the Budget Entry sheet.

6. **Transfer To/From Department**: Select the reciprocal department for the transfer.

7. **Comment**: Enter any additional details related to the transfer.

8. **Fiscal Year Amount**: Enter the amount.

9. Click the save icon (保存).
Salary & Benefit Adjustments Tab

The fourth tab is for overriding amounts from Position Budgeting for non-E&G funded positions. If you want to budget salary and benefits differently than the amounts coming from Position Budgeting, this sheet will replace your budget amounts with any amounts entered (see Figure 40 for an example). Please note that Budget Preparers may only override non-E&G funded positions.

![Figure 40 View and override amounts from Position Budgeting using the Salary & Benefits Adjustments tab.](image)

Step by step:

1) Select the specific department and fund in the blue ribbon for which salary and benefits will be overridden.

2) Enter an override amount in the blue cell corresponding with the budgetary account you wish to override. For example, if you wish to override the Budget A&P salary amount, you will enter a value into “710300 – Override.”

**NOTES:**

- The override amount will replace the amount from Position Budgeting. For example, if the amount from Position Budgeting is $59,766.20 and you enter an override amount of $57,000.00, the amount budgeted for is $57,000.00.

- Once you click save, a pop-up box will appear titled “Apply Breakback Method.” Your selection here will not matter, so you can simply click “OK” to proceed.

- The “Total” value will be incorrectly calculated as a sum of the Position Budgeting and your Override amount. Once you click save, the Total value will be resolved and correctly calculated.

3) Once you’ve entered the override amount, save your changes by clicking the save icon (保存).
Information and Reviews & Reports Tabs

The final two tabs are the Information and Reviews & Reports tabs. The first tab – Information – provides a very high-level guide and explanation of each tab, along with important dates, links to resources (such as this user’s manual), and a contact list. See Figure 41.

The second tab – Reviews & Reports – provides a guided review of your budgets. It is not an exhaustive list, but a good starting point for reviewing your budget entries. As with all the other tabs, the selections you make in the blue ribbon will be reflected in the data in the sheets and widgets on the Reviews & Reports tab. Additionally, several very useful reports, including error reports, are linked to this tab. See Figure 42.
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 cactus icon like in Figure 43.

Figure 43 Do not fret! Error reports will display a cactus if there are no errors!
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 44). 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 44 Display Options can be found in the toolbar above any sheet.](image)

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 45 for a screenshot.

![Figure 45 Display Options can be found in the toolbar above any sheet.](image)
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 46.

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 47.

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 48 and 49 below.

![Figure 19 Select the “hamburger” icon in the top left, then “Reports,” then “Overview” from the left-side menu.](image)

![Figure 20 On the left, select “Shared” to view all shared reports. The reports are organized into folders.](image)

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.