

Adaptive Planning 2025-26 Operating Budget 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 your entry instead of Sheets.

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, Merit Entry, and many others.

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 Figure 1 for a screenshot of the version selection. **If the data you are viewing is unexpected, please verify you have selected the correct version.**

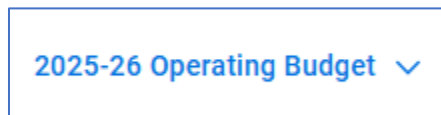


Figure 1 View and select the “Version” in the top-right corner of the screen.

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 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.

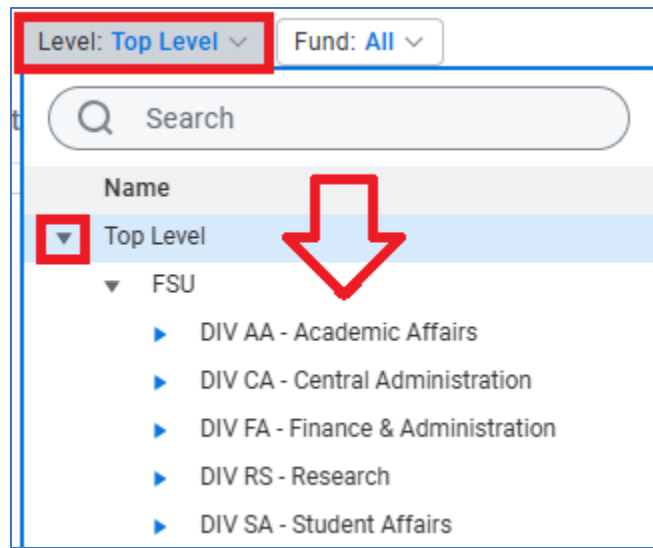


Figure 2 Some sheets have the Level selection on the right side of the ribbon.

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).

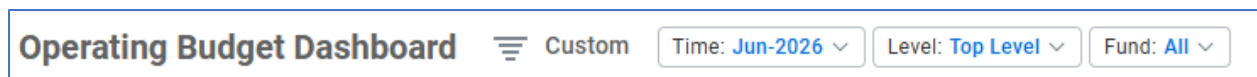


Figure 3 On Dashboards, the Level selection is typically in the middle of the ribbon.

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).

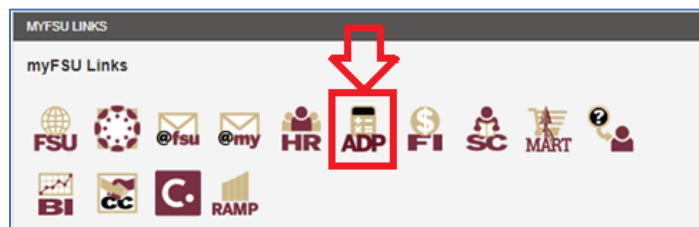


Figure 5 Access Adaptive Planning via the calculator icon on the myFSU portal.

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, construction transfers, other 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 6), selecting the “Operating Budget Dashboards” folder (Figure 7), and then selecting “Operating Budget Dashboard” (Figure 8).

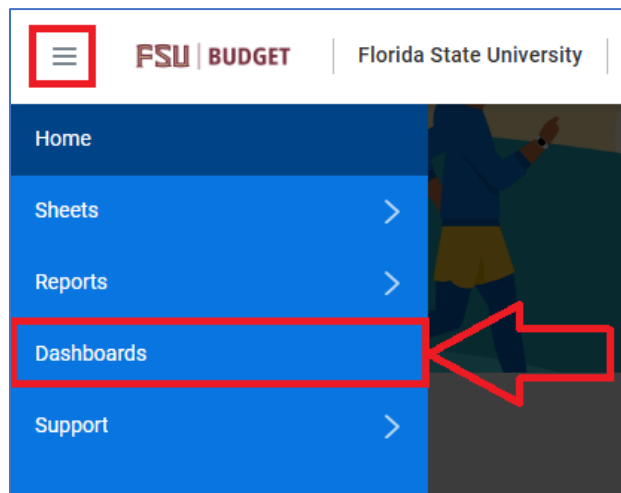


Figure 6 Select “Dashboards” from the left-hand menu.

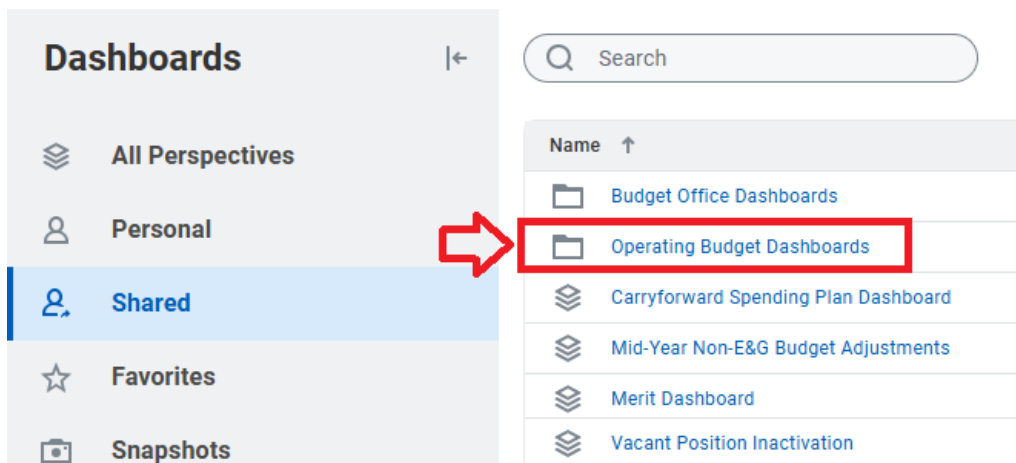


Figure 7 Select the “Operating Budget Dashboards” folder.

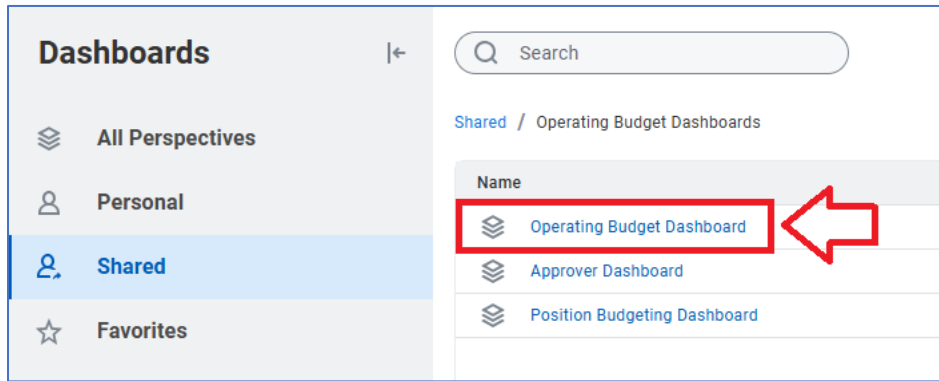


Figure 8 Select "Operating Budget Dashboard" from the list of available dashboards.

Ribbon

After you have opened the dashboard, you will see a ribbon at the top and several tabs below those. See Figure 9. The ribbon controls your perspective by Department ("Level") and Fund. Selecting "Top Level" and "All" funds provides an overview of all departments and funds you have access to on certain tabs.



Figure 9 The 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 10 and 11).

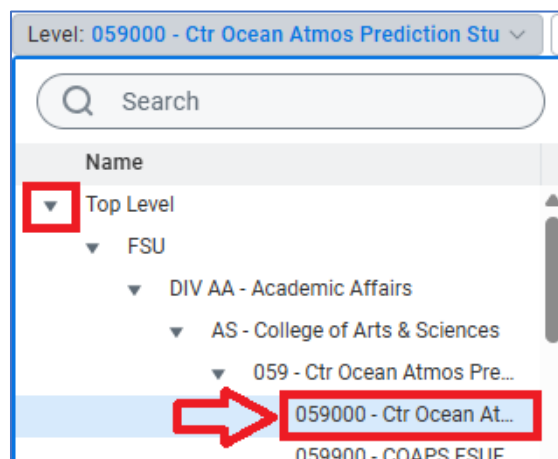


Figure 10 Expand or collapse the department level tree and select a level.

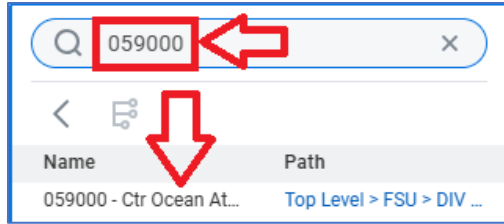


Figure 11 Use the Search bar to search for a level and select it.

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 12.

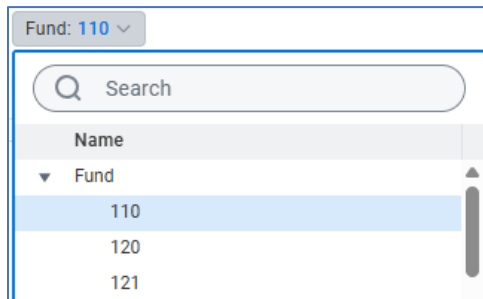


Figure 12 Select a specific fund or select “Fund” to select all funds.

Filter Sets can be created and saved for quick re-use. Click the “Default” (or “Custom”, if you already have selections made) icon in the ribbon and select “New Filter Set” (Figure 13). Create a name for the filter, make your selections, and click Save (Figure 14). Your custom filters are saved for future reuse (Figure 15).

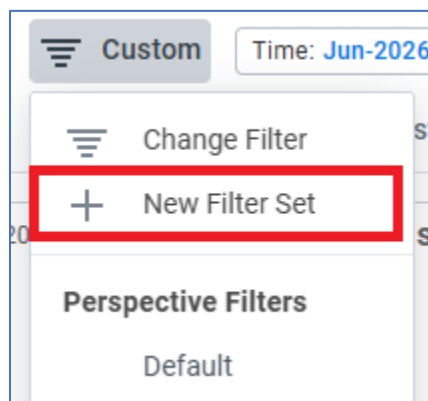


Figure 14 To create a custom, reusable filter, select “New Filter Set” from the Custom menu option in the ribbon.

Figure 15 Add a name and then make your selections.

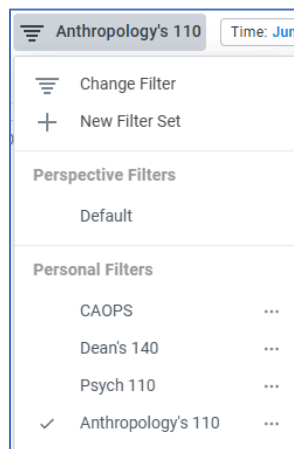


Figure 16 Your custom filter is now saved for quick re-use

On the right-hand side of the Ribbon, there are some options for (1) refreshing, (2) snapshot, (3) grid mode, and (4) presentation mode. See Figure 17.



Figure 17 The Ribbon also includes other tools to view and filter data.

1. **Refresh:** Provides the ability to refresh the contents of the tab.
2. **Snapshot:** Provides a way to share a static “snapshot” of the current tab and its contents.
3. **Grid Mode:** Arrange the tab’s contents in a tile view (default view).
4. **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 18). 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.

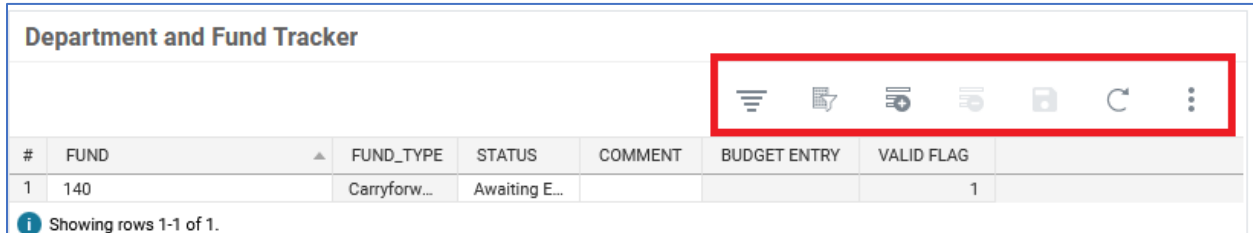


Figure 18 Every sheet has a toolbar with Filter, Display Options, Add/Remove rows, Save (diskette), and other options.

Widgets

There are a variety of widgets available on the Operating Budget Dashboard. Some of these provide information in charts or individual amounts (Figure 19).

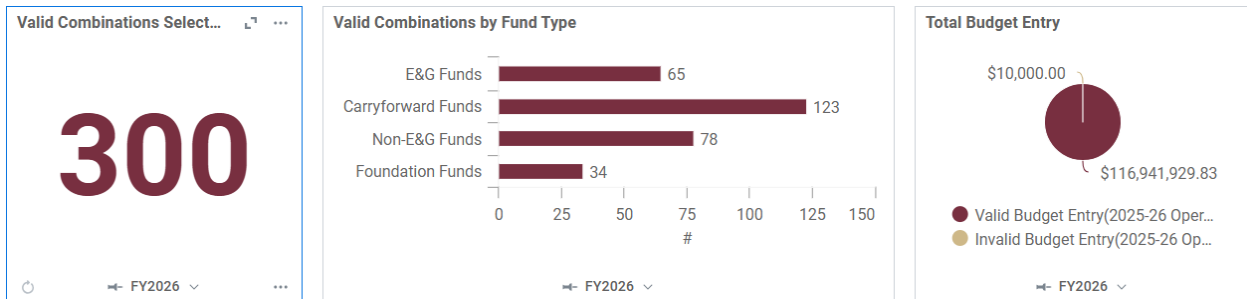


Figure 19 Widget help to visualize the data on your dashboards and point out useful metrics.

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 20.

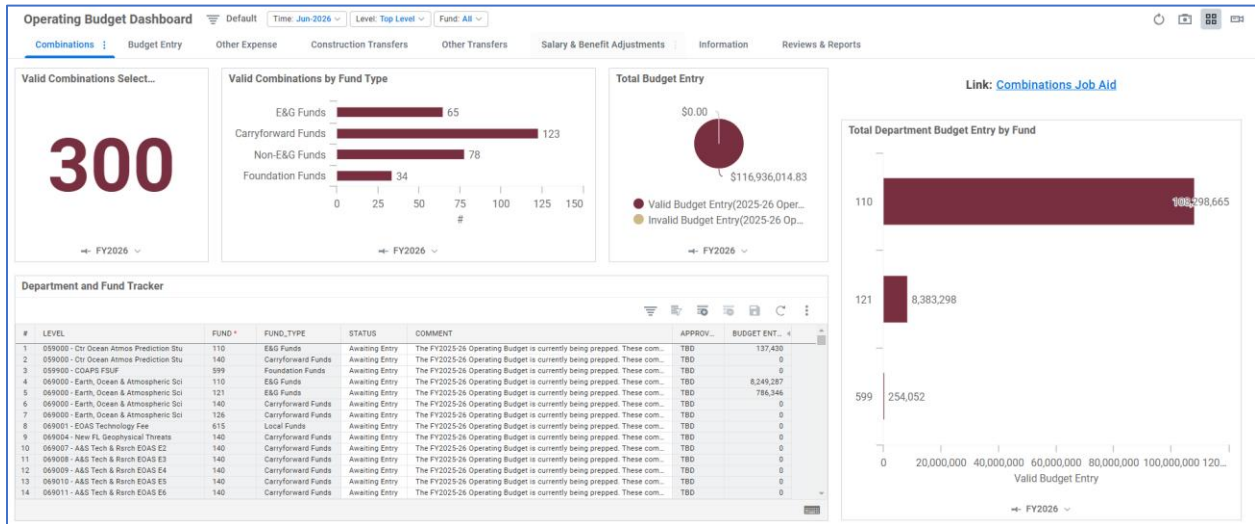


Figure 20 The Combinations tab for the Operating Budget Dashboard provides useful information before budget entry.

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 21.

#	LEVEL	FUND *	FUND_TYPE	STATUS	COMMENT	APPROVER	BUDGET ENTRY
1	059000 - Ctr Ocean Atmos Prediction Stu	110	E&G Funds	Awaiting Entry	The FY2025-26 Operating Budget is currently being prepped. These c...	TBD	137,430
2	059000 - Ctr Ocean Atmos Prediction Stu	140	Carryforward Funds	Awaiting Entry	The FY2025-26 Operating Budget is currently being prepped. These c...	TBD	0
3	059900 - COAPS FSUF	599	Foundation Funds	Awaiting Entry	The FY2025-26 Operating Budget is currently being prepped. These c...	TBD	0
4	069000 - Earth, Ocean & Atmospheric Sci	110	E&G Funds	Awaiting Entry	The FY2025-26 Operating Budget is currently being prepped. These c...	TBD	8,249,287
5	069000 - Earth, Ocean & Atmospheric Sci	121	E&G Funds	Awaiting Entry	The FY2025-26 Operating Budget is currently being prepped. These c...	TBD	786,346
6	069000 - Earth, Ocean & Atmospheric Sci	140	Carryforward Funds	Awaiting Entry	The FY2025-26 Operating Budget is currently being prepped. These c...	TBD	0
7	069000 - Earth, Ocean & Atmospheric Sci	126	Carryforward Funds	Awaiting Entry	The FY2025-26 Operating Budget is currently being prepped. These c...	TBD	0
8	069001 - EOAS Technology Fee	615	Local Funds	Awaiting Entry	The FY2025-26 Operating Budget is currently being prepped. These c...	TBD	0
9	069004 - New FL Geophysical Threats	140	Carryforward Funds	Awaiting Entry	The FY2025-26 Operating Budget is currently being prepped. These c...	TBD	0
10	069007 - A&S Tech & Rsrch EOAS E2	140	Carryforward Funds	Awaiting Entry	The FY2025-26 Operating Budget is currently being prepped. These c...	TBD	0
11	069008 - A&S Tech & Rsrch EOAS E3	140	Carryforward Funds	Awaiting Entry	The FY2025-26 Operating Budget is currently being prepped. These c...	TBD	0
12	069009 - A&S Tech & Rsrch EOAS E4	140	Carryforward Funds	Awaiting Entry	The FY2025-26 Operating Budget is currently being prepped. These c...	TBD	0
13	069010 - A&S Tech & Rsrch EOAS E5	140	Carryforward Funds	Awaiting Entry	The FY2025-26 Operating Budget is currently being prepped. These c...	TBD	0
14	069011 - A&S Tech & Rsrch EOAS E6	140	Carryforward Funds	Awaiting Entry	The FY2025-26 Operating Budget is currently being prepped. These c...	TBD	0

Figure 21 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 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 22 for an example.

#	LEVEL	FUND *	FUND_TYPE	STATUS	COMMENT
1	059000 - Ctr Ocean Atmos Prediction Stu	110	E&G Funds	Pending/In Progress	Entry in progress. Waiting on info from Budget Manager.
2	059000 - Ctr Ocean Atmos Prediction Stu	140	Carryforward Funds	No Entry/Request	
3	059900 - COAPS FSUF	599	Foundation Funds	No Entry/Request	
4	069000 - Earth, Ocean & Atmospheric Sci	110	E&G Funds	Pending/In Progress	Need more info about OPS and Expense budget.
5	069000 - Earth, Ocean & Atmospheric Sci	121	E&G Funds	Entry Complete	Salary only. No changes necessary.

Figure 22 Use the Department and Fund Tracker to keep notes and statuses.

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 23 for a list of status options.

STATUS
Awaiting Entry
Pending/In Progress
Entry Complete
Submitted
No Entry/Request ▼

Figure 23 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 is 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 (Figure 24). 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.

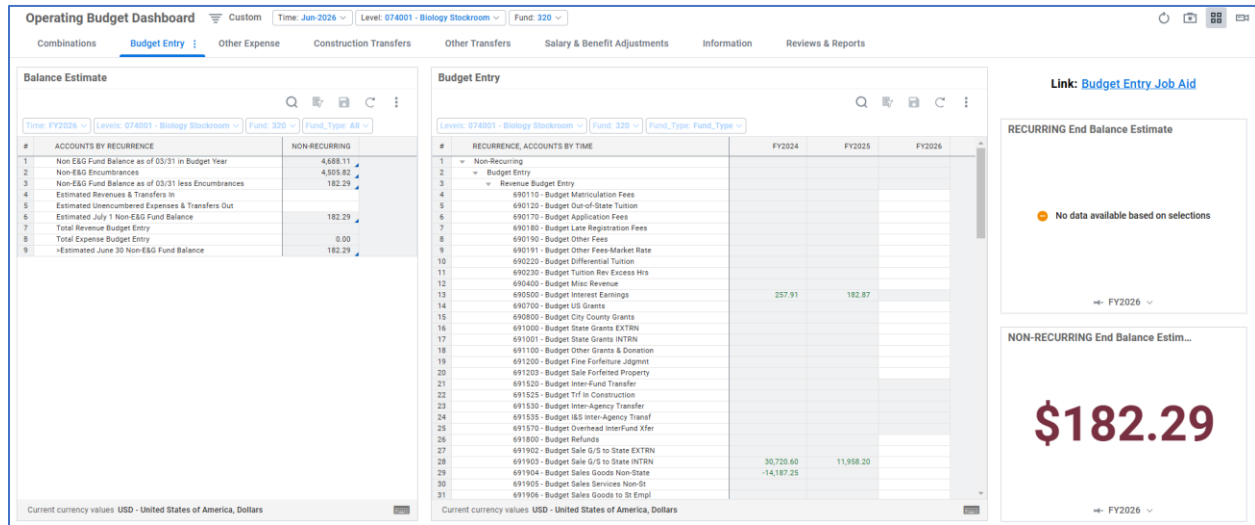


Figure 24 The Budget Entry tab provides essential information for your Budget Entry as well as a means to enter your budget.

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 ribbon, you will see balance estimate accounts specific to that fund code.

E&G Funds. In Figure 25, 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.

#	ACCOUNTS BY RECURRENCE	RECURRING	NON-RECURRING
1	Total E&G Rate Allocation	74,798.11	
2	Budgeted E&G Rate Use	93,741.11	
3	>Total E&G Rate Allocation Remaining	-18,943.00	
4	Total E&G Benefits Allocation	46,531.89	
5	Budgeted E&G Benefits Use	43,688.76	
6	>Total E&G Benefits Allocation Remaining	2,843.13	
7	Total Adjusted Non-Salary Allocation	49,000.00	
8	Total Non-Salary Expense	0.00	0.00
9	>Total Non-Salary Allocation Remaining	49,000.00	0.00

Figure 25 E&G Funds may be Recurring or Non-Recurring. The Balance Estimate sheet displays amounts related only to E&G funds.

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 are 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 26, a Carryforward Fund is selected. The Balance Estimate accounts 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.

#	ACCOUNTS BY RECURRENCE	NON-RECURRING
1	E&G Budget	1,816,846.74
2	E&G Encumbrances	488,819.01
3	E&G Expense	1,389,528.41
4	>E&G Available Balance	-61,500.68
5	▶ Salary Items Included Above	-85,248.49
8	▶ Salary Items Excluded Above	
14	E&G-Carryforward Budget	37,500.00
15	E&G-Carryforward Encumbrances	0.00
16	E&G-Carryforward Expense	24,142.42
17	>E&G-Carryforward Available Balance	13,357.58
18	>Total Available Balance as of 03/31	-48,143.10
19	Estimated Revenues & Transfers In	
20	Estimated Unencumbered Expenses & Transfers Out	
21	Estimated July 1 Available Balance	-48,143.10
22	Estimated Budget Year Transfers In	
23	>Total Available for the Budget Year	-48,143.10
24	Total Expense Budget Entry	0.00
25	>Estimated Unallocated Balance	-48,143.10

Figure 26 Carryforward funds are only non-recurring. Balance Estimates display amounts relevant only to Carryforward.

Budget Preparers may also make adjustments for Estimated Revenues and Transfers In and Estimated Unencumbered Expenses & Transfers Out.

Non-E&G Funds. In Figure 27, 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).

#	ACCOUNTS BY RECURRENCE	NON-RECURRING
1	Non E&G Fund Balance as of 03/31 in Budget Year	4,688.11
2	Non-E&G Encumbrances	4,505.82
3	Non-E&G Fund Balance as of 03/31 less Encumbrances	182.29
4	Estimated Revenues & Transfers In	
5	Estimated Unencumbered Expenses & Transfers Out	
6	Estimated July 1 Non-E&G Fund Balance	182.29
7	Total Revenue Budget Entry	
8	Total Expense Budget Entry	0.00
9	>Estimated June 30 Non-E&G Fund Balance	182.29

Figure 27 Non-E&G funds are only non-recurring. Balance Estimates display amounts relevant only to non-E&G.

Foundation Funds. In Figure 28, 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.

#	ACCOUNTS BY RECURRENCE	NON-RECURRING
1	Total Revenue Budget Entry	5,000.00
2	Total Expense Budget Entry	5,000.00
3	>Foundation Fund Balance Estimate	0.00

Figure 28 Foundation funds are only non-recurring. Balance Estimates display amounts relevant only to Foundation.

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 29). **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 are entering values as Recurring or Non-Recurring.**

#	RECURRENCE, ACCOUNTS BY TIME	FY2024	FY2025	FY2026
1	▼ Recurring			
2	▼ Budget Entry			
3	Revenue Budget Entry			
4	▼ Expenses Budget Entry			
5	▼ Salary Expenditures			
6	710200 - Budget Faculty	983,767.08	842,501.85	1,171,488.44
7	710300 - Budget Staff	1,994,018.87	1,543,792.92	2,533,242.09
8	710900 - Budget Other Salary			
9	Total	2,977,785.95	2,386,294.77	3,704,730.53
10	▼ Benefit Expenditures			
11	710299 - Budget Faculty Benefits	251,778.43	254,463.34	373,704.81
12	710399 - Budget Staff Benefits	814,161.70	652,956.09	1,134,991.34
13	Total	1,065,940.13	907,419.43	1,508,696.15
14	▼ Non-Salary Expenditures			
15	▼ 720000 - Budget OPS			
16	720001 - Budget OPS-Graduate Assistants	38,773.60	31,678.36	
17	720002 - Budget OPS-Post Doc Associates			
18	720003 - Budget OPS-OPS Faculty			
19	720004 - Budget OPS-Temporary Employmnt	172,314.61		
20	720005 - Budget OPS-Student Employment	47,929.24	16,774.70	
21	720006 - Budget OPS-OPS Fringe Benefits	3,112.99		

Figure 29 The Budget Entry sheet is where you may enter your budget for the upcoming fiscal year.

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 30 for an example.

#	RECURRENCE, ACCOUNTS BY TIME	FY2024	FY2025	FY2026
14	▼ Non-Salary Expenditures			
15	▼ 720000 - Budget OPS			
16	720001 - Budget OPS-Graduate Assistants	38,773.60	31,678.36	35,000.00
17	720002 - Budget OPS-Post Doc Associates			
18	720003 - Budget OPS-OPS Faculty			
19	720004 - Budget OPS-Temporary Employmnt	172,314.61		
20	720005 - Budget OPS-Student Employment	47,929.24	16,774.70	17,000.00
21	720006 - Budget OPS-OPS Fringe Benefits	3,112.99		
22	720007 - Budget OPS-Other OPS	52.56	137,941.78	118,000.00
23	720008 - Budget OPS-Bonus-1x			
24	720009 - Budget OPS-OT-Suppl			
25	720011 - Budget OPS-Grad Asst Benefits		2,661.02	2,905.00
26	720012 - Budget OPS-Post Doc Benefits			0.00
27	720015 - Budget OPS-Student Benefits		285.17	272.00
28	720017 - Budget OPS-Other OPS Benefits		11,587.12	9,296.00
29	720018 - Budget OPS-Bonus-1x Benefits			0.00
30	720019 - Budget OPS-OT-Suppl Benefits			0.00
31	Total	262,183.00	200,928.15	182,473.00

Figure 30 Unsaved entry amounts are denoted by blue text.

IMPORTANT NOTES: There are several budgetary and sub-budgetary accounts that are grey (read-only). These are the Salary and Benefits (710xxx) accounts, old OPS wage sub-budgetary accounts (for referencing prior FYs), OPS benefits (72001x), 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 OPS Benefits, Other Expenses, Transfers, and Salary & Benefit Adjustments for details.

OPS Wages and Benefits

Beginning FY 2024-25, Florida State University moved to a fringe benefit pool methodology for allocating fringe benefit expenses to departments. New OPS accounts – both general ledger (GL) and sub-budgetary – were created. A few existing OPS sub-budgetary accounts were inactivated (Table 2).

Table 2 Three OPS sub-budgetary accounts are now set to read-only on the Budget Entry sheet.

Old Sub-Budgetary Account	Notes
720003 - Budget OPS-OPS Faculty	Replaced by 720007 - Budget OPS-Other OPS)
720004 - Budget OPS-Temporary Employment	Replaced by 720007 - Budget OPS-Other OPS)
720006 - Budget OPS-OPS Fringe Benefits	Replaced by multiple accounts

The old sub-budgetary accounts listed above are displayed in budget entry so that you may be able to view prior year actuals and budget entry amounts. However, the cells are set to read-only to prevent mistakenly entering amounts in those inactive accounts.

OPS benefits are now calculated based on the amounts entered in the related wage sub-budgetary accounts. For instance, the proposed fringe rate for Graduate Assistants for FY2025-26 is 8.3%. If \$1,000 is entered into sub-budgetary account 720001 (Budget OPS-Graduate Assistants), the fringe is automatically calculated at \$83.00 (Figure 31) once the entry is saved.

Non-Salary Expenditures			
720000 - Budget OPS			
720001 - Budget OPS-Graduate Assistants			1,000.00
720002 - Budget OPS-Post Doc Associates			
720003 - Budget OPS-OPS Faculty			
720004 - Budget OPS-Temporary Employmnt	1,972.00		
720005 - Budget OPS-Student Employment			
720006 - Budget OPS-OPS Fringe Benefits			
720007 - Budget OPS-Other OPS		1,798.00	
720008 - Budget OPS-Bonus-1x			
720009 - Budget OPS-OT-Suppl			
720011 - Budget OPS-Grad Asst Benefits			83.00
720012 - Budget OPS-Post Doc Benefits			0.00

Figure 31 OPS benefits are automatically calculated based on entries in their related OPS wage accounts.

Entry Tools and Tricks

There are a variety of tools available for entering and notating your budget. By right-clicking on a cell, you can Copy Forward, Copy Downard, Adjust, Add Note, Explore Cell, and Display Options (Figure 32).

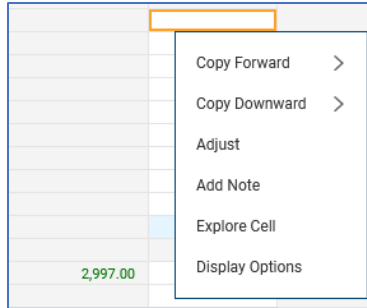


Figure 32 Right-clicking on an entry cell will display some entry options.

- **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 33). 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.

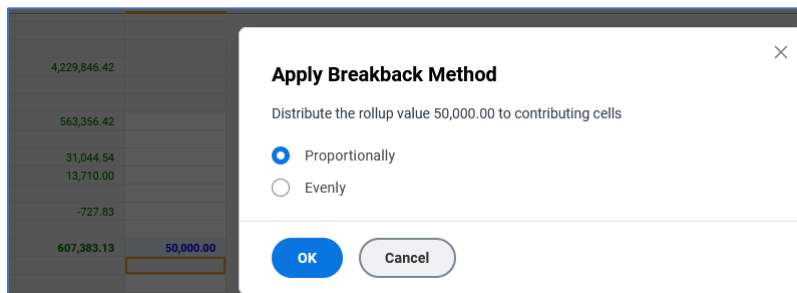


Figure 33 Breakback methods provide a tool for entering your budget proportionally based on some existing values.

Suppose you wish to budget some amount proportionally based on prior year actuals. In that case, you will first need to copy and paste the prior year's actuals into the associated cells for the budget year (Figure 34).

740000 - Budget Expense			
740001 - Budget Exp-Prof/Other Services	2,085.46	299,448.70	299,448.70
740002 - Budget Exp-Chartered Travel			
740003 - Budget Exp-Print/Reproduction	970.05	2,720.68	2,720.68
740004 - Budget Exp-Subrecipient			
740005 - Budget Exp-Travel	40,648.31	45,242.25	45,242.25
740006 - Budget Exp-Network/Telecom	8,047.44	1,187.66	1,187.66
740007 - Budget Exp-Utilities			
740008 - Budget Exp-Repair/Maint-Fac/Eq	1,103.00	874.00	874.00
740009 - Budget Exp-Maint IT Software		1,400.15	1,400.15
740011 - Budget Exp-Consumable Supplies	6,959.80	15,185.72	15,185.72
740012 - Budget Exp-Equip/Oth Supplies	195,955....	105,817.88	105,817.88
740013 - Budget Exp-Postal/Freight	143.93	453.85	453.85
740014 - Budget Exp-Insurance			
740015 - Budget Exp-Rentals		1,800.00	1,800.00
740016 - Budget Exp-Financial Aid			
740017 - Budget Exp-Other Exp	126.60	1,588.95	
Total	256,039....	475,719.84	474,130.89

Figure 34 Copy and paste prior year actuals.

Once you have 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 35).

Apply Breakback Method

Distribute the rollup value 320,000.00 to contributing cells

Proportionally
 Evenly

Figure 35 Use the optional breakback method to proportionally distribute an amount.

See Figure 36 for the final result of proportionally budgeting \$320,000 based on prior year actuals.

740000 - Budget Expense			
740001 - Budget Exp-Prof/Other Services	2,085.46	299,448.70	202,103.65
740002 - Budget Exp-Chartered Travel			
740003 - Budget Exp-Print/Reproduction	970.05	2,720.68	1,836.24
740004 - Budget Exp-Subrecipient			
740005 - Budget Exp-Travel	40,648.31	45,242.25	30,534.86
740006 - Budget Exp-Network/Telecom	8,047.44	1,187.66	801.57
740007 - Budget Exp-Utilities			
740008 - Budget Exp-Repair/Maint-Fac/Eq	1,103.00	874.00	589.88
740009 - Budget Exp-Maint IT Software		1,400.15	944.99
740011 - Budget Exp-Consumable Supplies	6,959.80	15,185.72	10,249.13
740012 - Budget Exp-Equip/Oth Supplies	195,955.00	105,817.88	71,418.51
740013 - Budget Exp-Postal/Freight	143.93	453.85	306.31
740014 - Budget Exp-Insurance			
740015 - Budget Exp-Rentals		1,800.00	1,214.85
740016 - Budget Exp-Financial Aid			
740017 - Budget Exp-Other Exp	126.60	1,588.95	
Total	256,039.00	475,719.84	320,000.00

Figure 36 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 have entered the total you want to breakback in the blue cell, it will be distributed accordingly (Figure 37).

740000 - Budget Expense			
740001 - Budget Exp-Prof/Other Services	2,085.46	299,448.70	35.00
740002 - Budget Exp-Chartered Travel			
740003 - Budget Exp-Print/Reproduction	970.05	2,720.68	6.00
740004 - Budget Exp-Subrecipient			
740005 - Budget Exp-Travel	40,648.31	45,242.25	10.00
740006 - Budget Exp-Network/Telecom	8,047.44	1,187.66	5.00
740007 - Budget Exp-Utilities			
740008 - Budget Exp-Repair/Maint-Fac/Eq	1,103.00	874.00	3.00
740009 - Budget Exp-Maint IT Software		1,400.15	7.00
740011 - Budget Exp-Consumable Supplies	6,959.80	15,185.72	10.00
740012 - Budget Exp-Equip/Oth Supplies	195,955.00	105,817.88	15.00
740013 - Budget Exp-Postal/Freight	143.93	453.85	2.00
740014 - Budget Exp-Insurance			
740015 - Budget Exp-Rentals		1,800.00	7.00
740016 - Budget Exp-Financial Aid			
740017 - Budget Exp-Other Exp	126.60	1,588.95	
Total	256,039.00	475,719.84	100.00

Figure 37 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 37).

▼ 740000 - Budget Expense			
740001 - Budget Exp-Prof/Other Services	2,085.46	299,448.70	112,000.00
740002 - Budget Exp-Chartered Travel			
740003 - Budget Exp-Print/Reproduction	970.05	2,720.68	19,200.00
740004 - Budget Exp-Subrecipient			
740005 - Budget Exp-Travel	40,648.31	45,242.25	32,000.00
740006 - Budget Exp-Network/Telecom	8,047.44	1,187.66	16,000.00
740007 - Budget Exp-Utilities			
740008 - Budget Exp-Repair/Maint-Fac/Eq	1,103.00	874.00	9,600.00
740009 - Budget Exp-Maint IT Software		1,400.15	22,400.00
740011 - Budget Exp-Consumable Supplies	6,959.80	15,185.72	32,000.00
740012 - Budget Exp-Equip/Oth Supplies	195,955.00	105,817.88	48,000.00
740013 - Budget Exp-Postal/Freight	143.93	453.85	6,400.00
740014 - Budget Exp-Insurance			
740015 - Budget Exp-Rentals		1,800.00	22,400.00
740016 - Budget Exp-Financial Aid			
740017 - Budget Exp-Other Exp	126.60	1,588.95	
Total	256,039.00	475,719.84	320,000.00

Figure 38 The breakback amount has been distributed proportionally based on the "percentages" entered.

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 need to identify the general ledger (GL) account that will be used for the expenses. Additionally, you must include an adequate explanation for the expenses. See Figure 39.

The screenshot shows the 'Operating Budget Dashboard' with the 'Other Expense' tab selected. The dashboard includes a navigation menu with options like 'Combinations', 'Budget Entry', 'Other Expense', 'Construction Transfers', 'Other Transfers', 'Salary & Benefit Adjustments', 'Information', and 'Reviews & Reports'. The main content area displays a table for budget entries with columns for '#', 'FUND+', 'GL ACCOUNT', 'RECURRENCE', 'EXPLANATION', and 'FY2026'. The table contains one row with a total of 1,500.00. To the right, there are 'Important Notes' and two summary cards: 'Count of Other Expenses' showing 1 and 'Total Other Expenses' showing \$1.5 k.

#	FUND+	GL ACCOUNT	RECURRENCE	EXPLANATION	FY2026
1	110	741924 - Memberships Individual	Recurring	Faculty subscription to Earth, Wind, & Fire Journal	1,500.00
2	Total				1,500.00

Figure 39 Enter "Other Expense" budget via the Other Expense tab. You must budget by the GL account and provide an explanation.

To enter Other Expense budget, click the Add Row button in the toolbar above the sheet. See Figure 40.

The screenshot shows a close-up of the toolbar above the budget table. The 'Add Row' button, represented by a plus sign in a square, is highlighted with a red box. A red arrow points upwards from the bottom of the table towards the 'Add Row' button.

Figure 40 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 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 41.

Other Expense					
#	FUND *	GL ACCOUNT	RECURRENCE	EXPLANATION	FY2026
1	110	741924 - Memberships Individual	Recurring	Faculty subscription to Earth, Wind, & Fire! Journal	1,500.00
+	110	741924 - Memberships Individual	Recurring	Faculty subscription to "¡Caliente! South American Volcanology Journ...	500.00
2	Total				2,000.00

Showing rows 1-1 of 1

Figure 41 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.

Construction Transfers Tab

The Construction Transfers tab is new for FY2025-26 Operating Budget entry. This tab is for entering budget in account 780125 (Budget Trf Out Construction). It is not necessary to budget for construction transfers in (691525 – Budget Trf In Construction). See Figure 42.

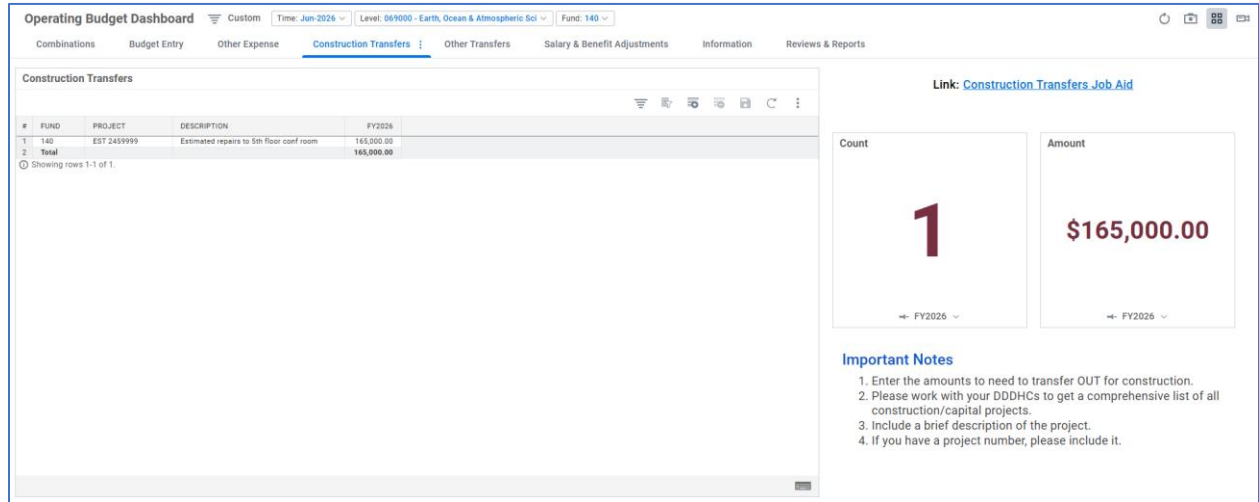


Figure 42 The Construction Transfers tab provides an option to view and enter construction transfers.

Similar to the Other Expense tab, you may budget for budgetary account 780125 (Budget Trf Out Construction) by adding a row and entering the fund, project (if one exists) or estimate number, a description of the project, and the transfer amount needed. Once saved, the amounts show up on the Budget Entry tab (Figure 43).

#	RECURRENCE, ACCOUNTS BY TIME	FY2024	FY2025	FY2026
63	760002 - Budget OCO-Real Property			
64	760003 - Budget OCO-Interest Expense			
65	760004 - Budget OCO-Leases/Install Prch			
66	760005 - Budget OCO-Debt Service			
67	Total	50,562.73	66,595.96	
68	780110 - Budget Inter-Agn Transf			
69	780125 - Budget Trf Out Construction			165,000.00
70	780140 - Budget Inter-Fnd Transf			

Figure 43 Amounts entered on the Construction Transfers tab are reflected on the Budget Entry tab.

Other Transfers Tab

The fifth tab is for entering non-exchange transfers and viewing any overhead assessment amounts. See Figure 44. Please note that construction transfers are now entered on the Construction Transfers tab only. See the Construction Transfers section for more details.

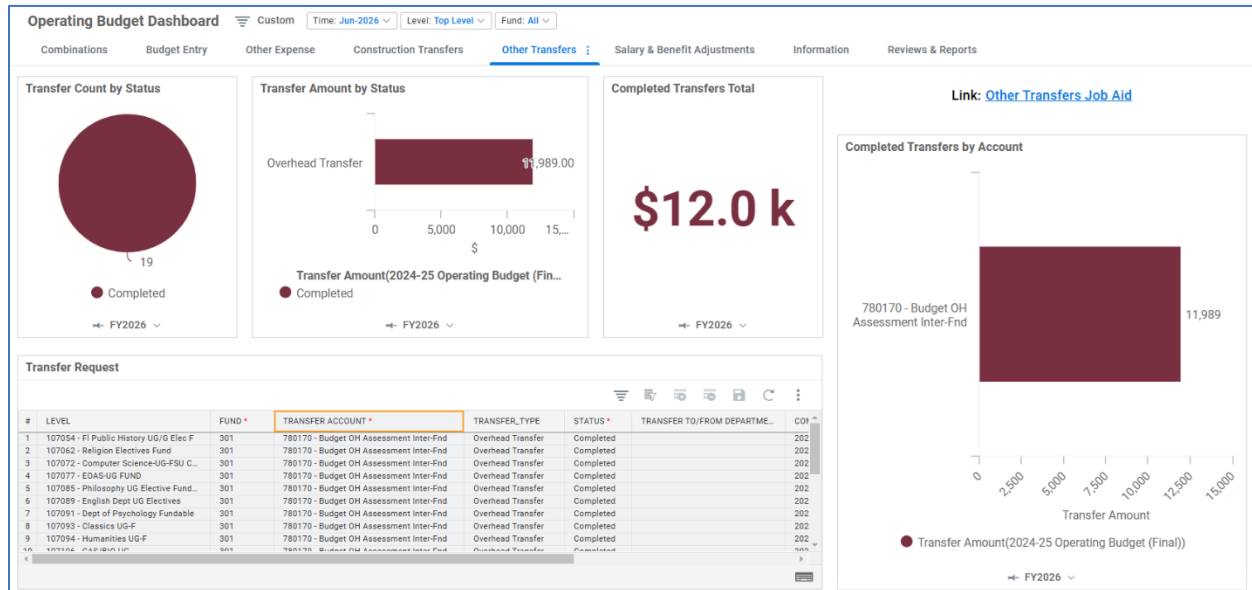


Figure 44 The Transfers tab provides an option to view and enter non-exchange transfers.


Transfer Requests are entered by adding a row and selecting the transfer accounts, amounts, and the department you are transferring to/from (Figure 45). Several widgets provide high-level details associated with transfers and a Transfer Request sheet for entering your transfers.

#	FUND *	TRANSFER ACCOUNT *	TRANSFER_TYPE	STATUS *	TRANSFER TO/FROM DEF	COMMENT	FY2023
+	320	780110 - Budget Inter-Agn ...	Transfer Out	Requested	017001 - FSUCard Ce...	New trans...	5,000.00
1	Total						5,000.00

Figure 45 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 are 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 ().

Salary & Benefit Adjustments Tab

The sixth 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 46 for an example). **Please note that Budget Preparers may only override non-E&G funded positions.**


#	RECURRENCE, ACCOUNTS BY TIME	FY2026
1	▼ Non-Recurring	
2	▼ 710200 - Budget Faculty Salary	
3	710200 - Position Budgeting	56,500.00
4	710200 - Override	
5	710200 - Adjustment	0.00
6	Total	56,500.00
7	▼ 710299 - Budget Faculty Benefits	
8	710299 - Position Budgeting	18,023.50
9	710299 - Override	
10	710299 - Adjustment	0.00
11	Total	18,023.50
12	▼ 710300 - Budget Staff	
13	710300 - Position Budgeting	
14	710300 - Override	
15	710300 - Adjustment	0.00
16	Total	0.00
17	▼ 710399 - Budget Staff Benefits	
18	710399 - Position Budgeting	
19	710399 - Override	
20	710399 - Adjustment	0.00
21	Total	0.00

Figure 46 View and override amounts from Position Budgeting using the Salary & Benefits Adjustments tab.

Step by step:

- 1) Select the specific department and fund in the 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 \$56,500.00 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 have entered the override amount, save your changes by clicking the save icon ().

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 47.

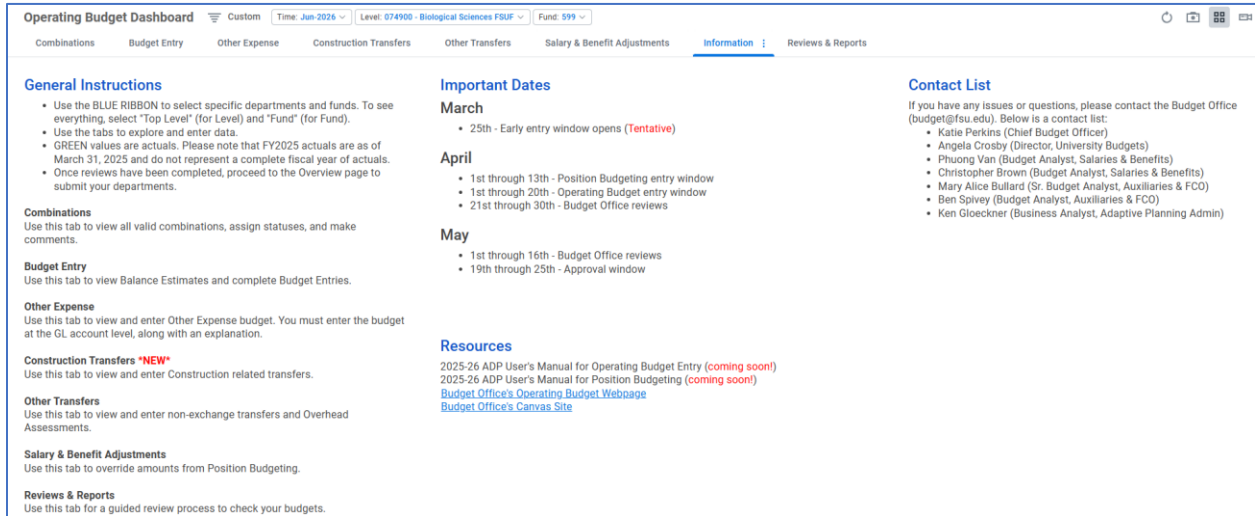


Figure 47 The Information provides essential information and links to resources for your budget entry.

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 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 48.

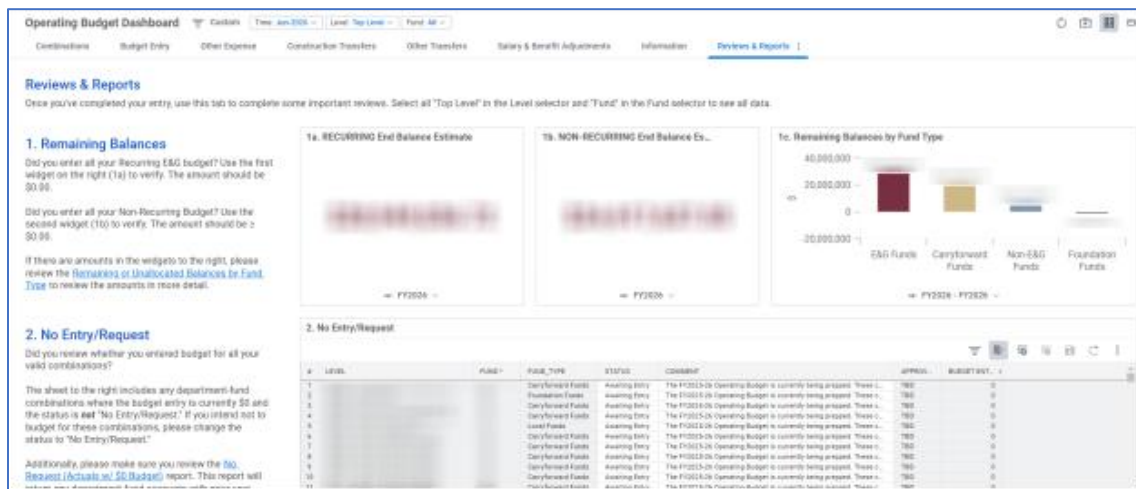


Figure 48 View and override amounts from Position Budgeting using the Salary & Benefits Adjustments tab.

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 like in Figure 49.

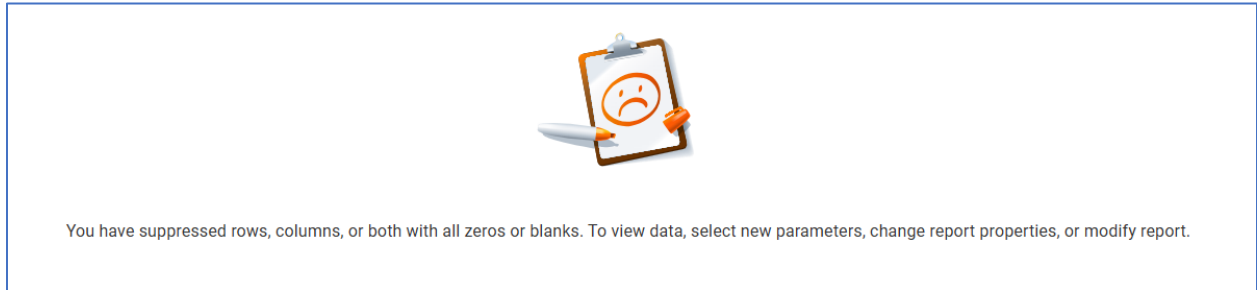


Figure 49 When there are no results, the report will display a sad clipboard.

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 50). 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.

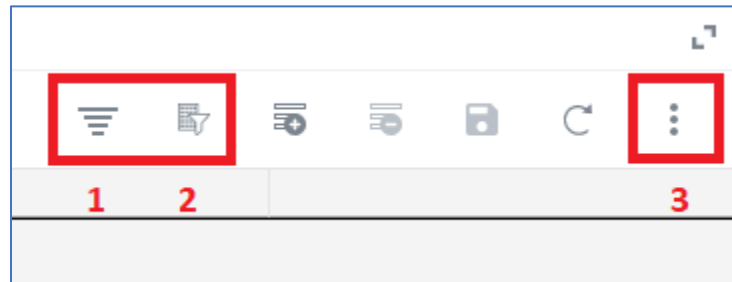


Figure 50 Display Options can be found in the toolbar above any sheet.

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 51 for a screenshot.

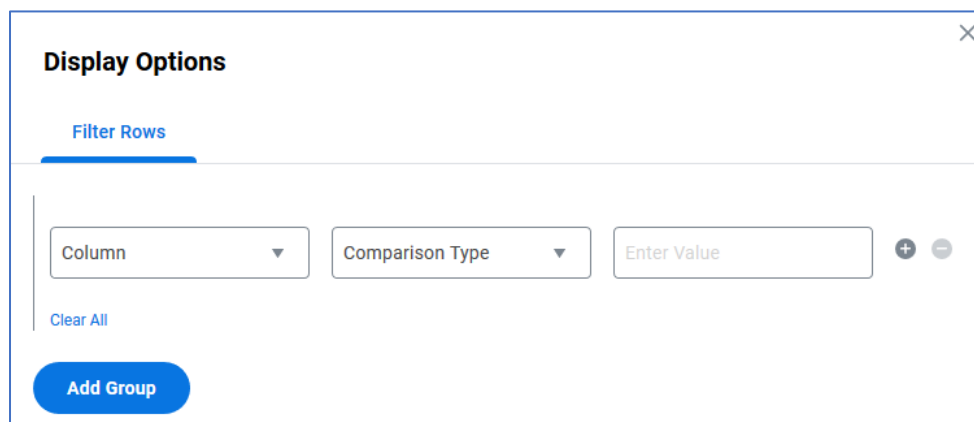


Figure 51 Display Options can be found in the toolbar above any sheet.

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 52.

The image shows a 'Display Options' dialog box with a close button (X) 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 (-) buttons. Below the filter row is a 'Clear All' link and a blue 'Add Group' button.

Figure 52 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 53.

The image 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 (-) buttons to its right. At the bottom, there is a 'Clear All' link and a blue 'Add Group' button.

Figure 53 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 54 and 55 below.

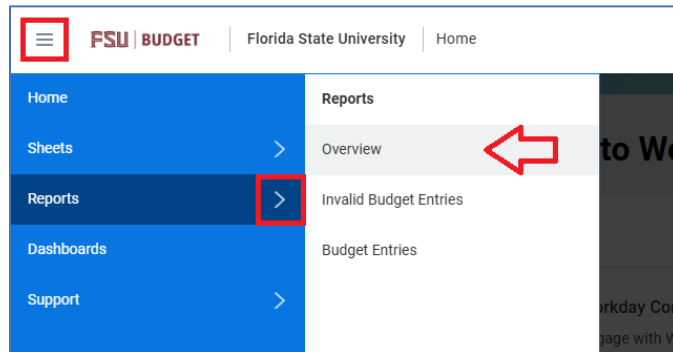


Figure 54 Select the “hamburger” icon in the top left, then “Reports,” then “Overview” from the left-side menu.

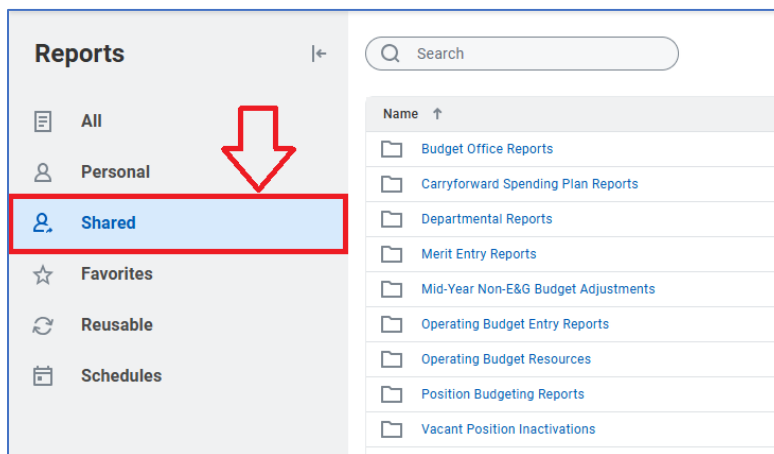
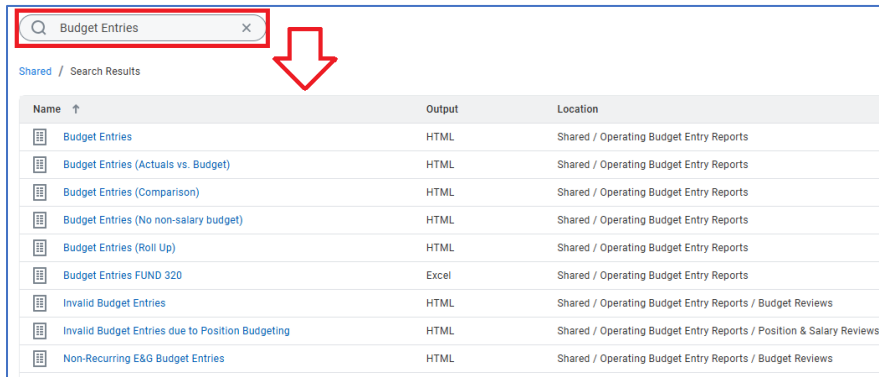


Figure 55 On the left, select “Shared” to view all shared reports. The reports are organized into folders.

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 56).



The screenshot shows a search interface with a search bar at the top containing the text "Budget Entries". A red box highlights the search bar, and a red arrow points downwards from it. Below the search bar, the text "Shared / Search Results" is visible. A table lists the search results with columns for Name, Output, and Location. The table contains ten rows of report entries.










Name ↑	Output	Location
 Budget Entries	HTML	Shared / Operating Budget Entry Reports
 Budget Entries (Actuals vs. Budget)	HTML	Shared / Operating Budget Entry Reports
 Budget Entries (Comparison)	HTML	Shared / Operating Budget Entry Reports
 Budget Entries (No non-salary budget)	HTML	Shared / Operating Budget Entry Reports
 Budget Entries (Roll Up)	HTML	Shared / Operating Budget Entry Reports
 Budget Entries FUND 320	Excel	Shared / Operating Budget Entry Reports
 Invalid Budget Entries	HTML	Shared / Operating Budget Entry Reports / Budget Reviews
 Invalid Budget Entries due to Position Budgeting	HTML	Shared / Operating Budget Entry Reports / Position & Salary Reviews
 Non-Recurring E&G Budget Entries	HTML	Shared / Operating Budget Entry Reports / Budget Reviews

Figure 56 Use the search field to quickly find reports you are looking for.