Adaptive Planning
2023-24 Budget Entry Manual

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General Notes

The following section includes 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 summarize data 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. See below for a screenshot of the Version selection. The system will remember your preferred Version after entering and saving data. If the data you're viewing is unexpected, please verify that you've selected the correct version.
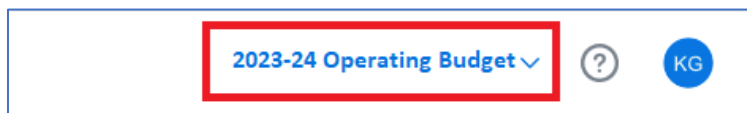

Figure 1View and select the "Version" in the top-right corner of the screen.

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 essential distinction between Home Departments and Funding Departments. Please see the previous section for more details.) Outside of Position Budgeting, Levels act as a security/access mechanism for Budget Entry and identify the Department ID within FSU's department tree hierarchy.
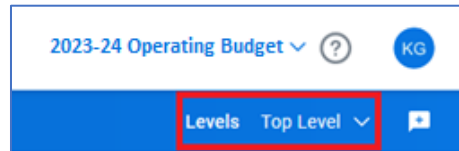

Figure 2 Some sheets have the Level selection on the right side of the ribbon.

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 the Version selection) or in the middle of the blue ribbon. See Figure 3.
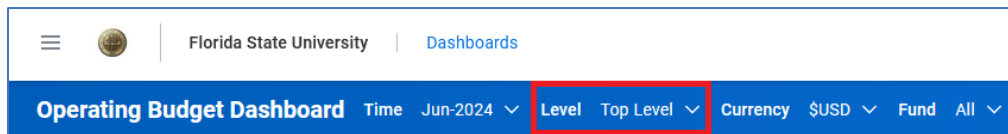

Figure 3 On Dashboards, the Level selection is typically in the middle of the ribbon.

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 should 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 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 data types by color and style.

Font Style	Description
Black	Saved values
Green	Actuals
Blue	Unsaved values
Bold	**Totals/Roll-up values**

Getting Started

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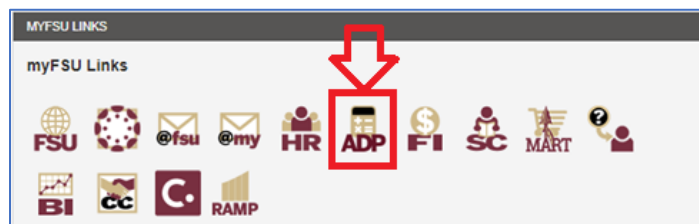
Browser Compatibility

Workday's recommended browsers are Chrome and Firefox, but others 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 contact 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:

https://cas.fsu.edu/cas/idp/profile/SAML2/Unsolicited/SSO?providerId=https://login.adaptivein sights.com:443/samlsso/RlNVMQ==

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.

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, enter non-exchange transfers, and override the non-E&G salary and benefit amounts populated from Position Budgeting.

You can navigate to the Operating Budget Dashboard by clicking the "hamburger" icon at the top-left of the screen, selecting "Dashboards" (Figure 5), and then selecting "Operating Budget Dashboard" (Figure 6).
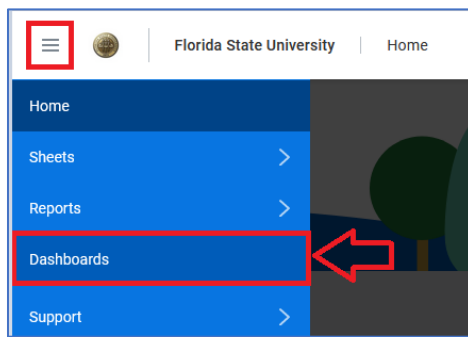

Figure 5 Select "Dashboards" from the left-hand menu.
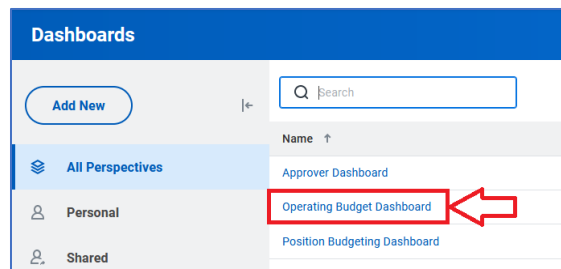

Figure 6 Select "Operating Budget Dashboard" from the list of available dashboards.

Ribbon

After you've opened the dashboard, you will see a blue ribbon at the top and several tabs below those. See Figure 7. 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.
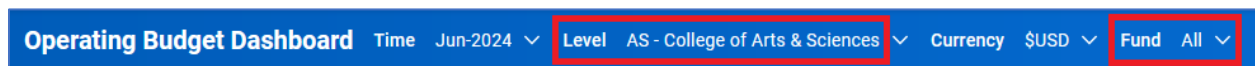

Figure 7 The blue ribbon provides an easy and quick means to filter data.

To select a specific division, school, area, or department, select the downward arrow and either choose a level from the menu or use the search bar to find a specific level (Figure 8).
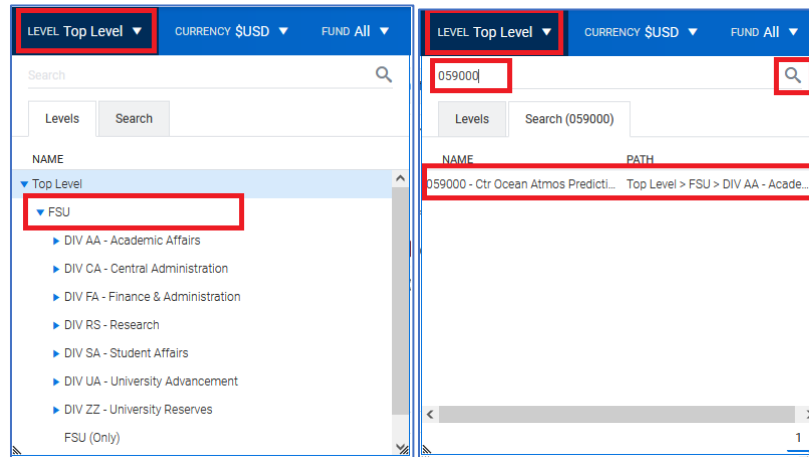
Figure 8 Expand or collapse the department level tree and select a level, or use the search bar to find a specific department.

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 9.

Figure 9 Select a specific fund or select "Fund" to see all funds combined.

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 10.

Figure 10 The Ribbon also includes other tools to view and filter data.

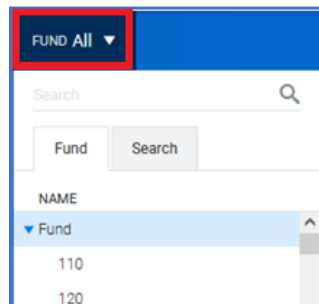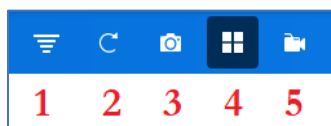1. **Filters**: Provides an alternative way to select the Time, Level, Currency, and Fund selections.
2. **Refresh**: Provides the ability to refresh the tab's contents.
3. **Snapshot**: Provides a way to share a static "snapshot" of the current tab and its contents.
4. **Grid Mode**: Arranges the tab's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

Toolbar

Every sheet in the Operating Budget Dashboard includes a toolbar (see Figure 11). The toolbar includes functions like those found in the toolbar for Position Budgeting and Position Transfers. 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 far right-hand side of the toolbar provide more options that may be hidden.
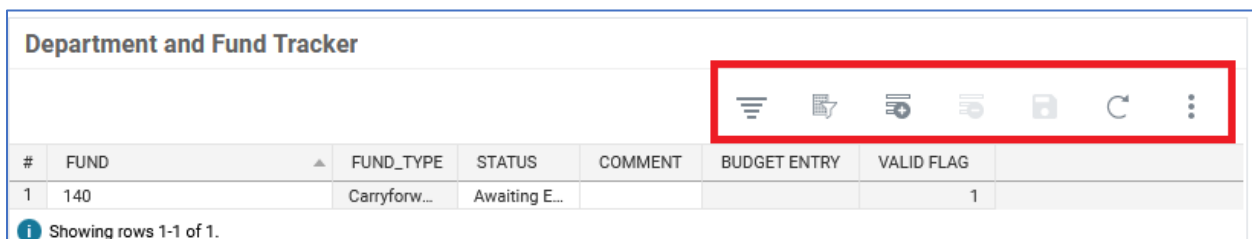

Figure 11 Every sheet has a toolbar with Filter, Display Options, Add/Remove rows, Save (diskette), and other options.

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, and (3) a list of all valid combinations that you have access to for budget entry. See Figure 12.
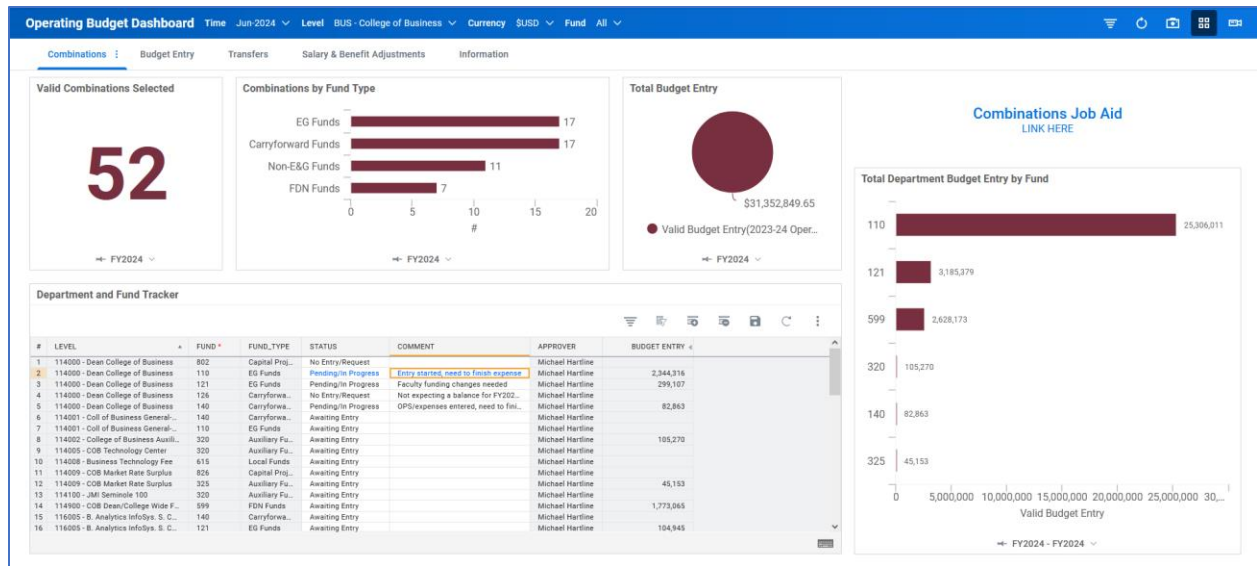

Figure 12 The Combinations tab for the Operating Budget Dashboard provides valuable information before budget entry.

On the Combinations tab 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 13.

Department and Fund Tracker

#	LEVEL	FUND *	FUND_TYPE	STATUS	COMMENT	APPROVER	BUDGET ENTRY
1	114000 - Dean College of Business	802	Capital Proj...	No Entry/Request		Michael Hartline	
2	114000 - Dean College of Business	110	EG Funds	Pending/In Progress	Entry started, need to finish expense	Michael Hartline	2,344,316
3	114000 - Dean College of Business	121	EG Funds	Pending/In Progress	Faculty funding changes needed	Michael Hartline	299,107
4	114000 - Dean College of Business	126	Carryforwa...	No Entry/Request	Not expecting a balance for FY202...	Michael Hartline	
5	114000 - Dean College of Business	140	Carryforwa...	Pending/In Progress	OPS/expenses entered, need to fini...	Michael Hartline	82,863
6	114001 - Coll of Business General-...	140	Carryforwa...	Awaiting Entry		Michael Hartline	

Figure 13 The Department and Fund Tracker lists valid combinations, statuses, total budget entries, 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 adjust 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, the number of valid combinations will remain the same. 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 department-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 14 for an example.

STATUS	COMMENT
No Entry/Request	
Pending/In Progress	Entry started, need to finish expense
Pending/In Progress	Faculty funding changes needed
No Entry/Request	Not expecting a balance for FY202...
Pending/In Progress	OPS/expenses entered, need to fini...

Figure 14 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 inform the Budget Office that the valid combination has not been erroneously missed. See Figure 15 for a list of status options.

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

Figure 15 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 with invalid budget entries, please use the "Invalid Budget Entries" report (Reports → Shared → Budget Entry Reports). You may run this report by division, school, area, or department.

You must review the invalid budget entries and determine whether they're incorrect. If you believe that the department and fund are indeed a valid combination, please contact the Budget Office (budget@fsu.edu). Alternatively, suppose you believe the entries are invalid. In that case, 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 16 for a screenshot). Two primary sheets are visible on this tab: Balance Estimate and Budget Entry. The Department and Fund Tracker is also visible on this sheet, along with a widget calculating your "Ending Balance Estimate."
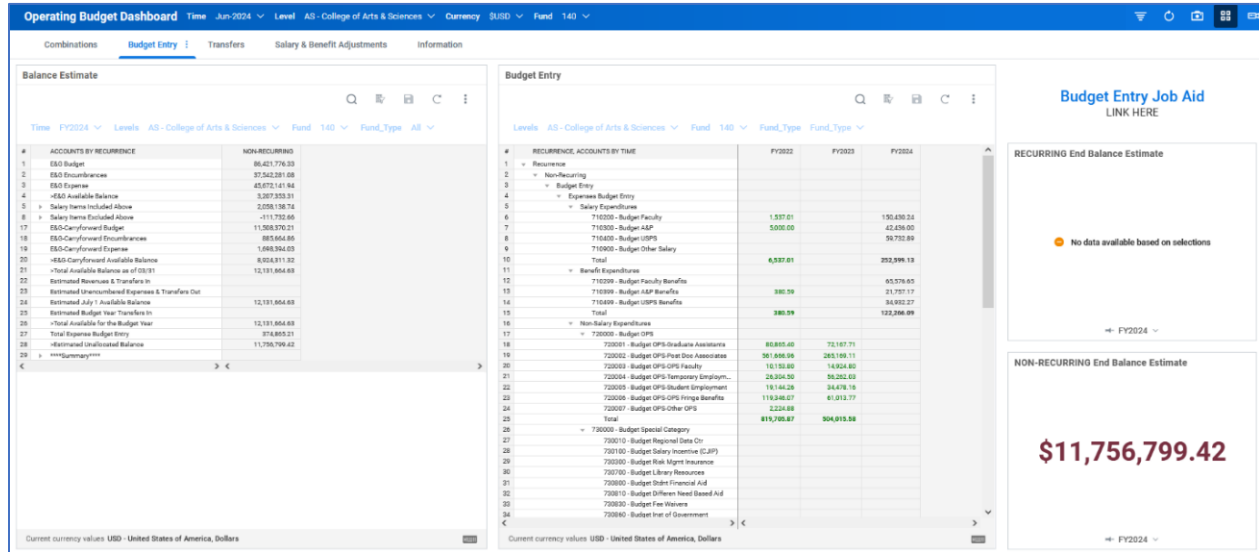

Figure 16 The Budget Entry tab provides essential information for your Budget Entry, and a means to enter the budget.

The Budget Entry tab is contextually 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) or a non-E&G fund (auxiliary, tech fee, etc.) will adjust accordingly. The Budget Entry sheet will also 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 Non-Recurring budgetary and sub-budgetary accounts.

Balance Estimate

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

E&G Funds. In Figure 17, an E&G fund is selected; 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	82,242.82	
2	Budgeted E&G Rate Use	82,242.82	
3	>Total E&G Rate Allocation Remaining	-0.00	
4	Total E&G Benefits Allocation	44,268.79	
5	Budgeted E&G Benefits Use	44,974.13	
6	>Total E&G Benefits Allocation Remaining	-705.34	
7	Total Adjusted Non-Salary Allocation	43,294.00	
8	Total Non-Salary Expense		
9	>Total Non-Salary Allocation Remaining	43,294.00	

Figure 17 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'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 to 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 additional budget or offset it with budget in another department within your unit (Division, School, or Area).

Carryforward Funds. In Figure 18, 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.

#	ACCOUNTS BY RECURRENCE	NON-RECURRING
1	E&G Budget	43,419.00
2	E&G Encumbrances	13,306.80
3	E&G Expense	15,924.05
4	>E&G Available Balance	14,188.15
5	▶ Salary Items Included Above	0.00
8	▶ Salary Items Excluded Above	4,977.30
17	E&G-Carryforward Budget	61,450.57
18	E&G-Carryforward Encumbrances	878.67
19	E&G-Carryforward Expense	1,340.37
20	>E&G-Carryforward Available Balance	59,231.53
21	>Total Available Balance as of 03/31	73,419.68
22	Estimated Revenues and Transfers In	
23	Estimated Unencumbered Expenses & Transfers Out	
24	Estimated July 1 Available Balance	73,419.68
25	Estimated Budget Year Transfers In	
26	>Total Available for the Budget Year	73,419.68
27	Total Expense Budget Entry	
28	>Estimated Unallocated Balance	73,419.68

Figure 18 Carryforward funds are only non-recurring. Balance Estimates display amounts relevant only to Carryforward.

Budget Preparers can also make adjustments for Estimated Revenues and Transfers In and Estimated Unencumbered Expenses & Transfers Out that may occur in April through the remainder of the fiscal year (June 30).

Non-E&G Funds. In Figure 19, 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	804,036.25
2	Non-E&G Encumbrances	93,276.68
3	Non-E&G Fund Balance as of 03/31 less Encumbrances	710,759.57
4	Estimated Revenues and Transfers In	
5	Estimated Unencumbered Expenses & Transfers Out	
6	Estimated July 1 Non-E&G Fund Balance	710,759.57
7	Total Revenue Budget Entry	
8	Total Expense Budget Entry	297,060.06
9	>Estimated June 30 Non-E&G Fund Balance	413,699.51

Figure 19 Non-E&G funds are only non-recurring. Balance Estimates display amounts relevant only to non-E&G.

Foundation Funds. In Figure 20, 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	4,750.00
3	>Foundation Fund Balance Estimate	250.00

Figure 20 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 21). 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**.

Figure 21 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 budget. 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 22 for an example.

Figure 22 Unsaved entry amounts are denoted by blue text.

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 23).
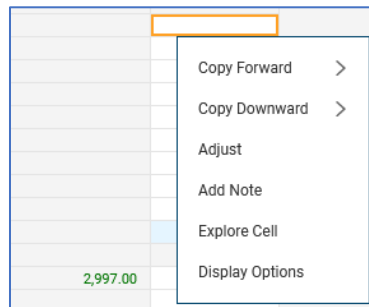

Figure 23 Right-clicking on a entry cell will display some entry options.

- **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 24). 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.
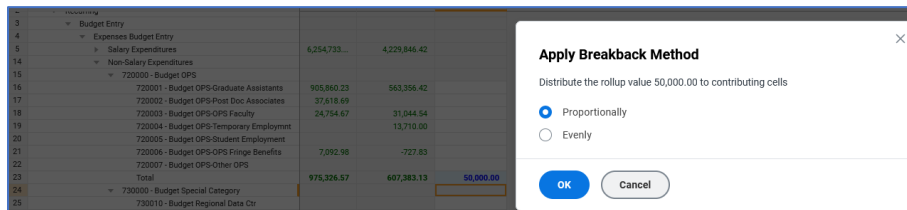

Figure 24 Breakback methods provide a tool for entering budget proportional.

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 25).

720000 - Budget OPS				
720001 - Budget OPS-Graduate Assistants	47,175.42	70,858.24	23,061.20	23,061.20
720002 - Budget OPS-Post Doc Associates	14,671.65			
720003 - Budget OPS-OPS Faculty				
720004 - Budget OPS-Temporary Employmnt	118,335.75	124,410.91	97,033.32	97,033.32
720005 - Budget OPS-Student Employment	21,063.48	13,701.00	24,395.27	24,395.27
720006 - Budget OPS-OPS Fringe Benefits	13,736.74	10,744.29	7,512.37	7,512.37
720007 - Budget OPS-Other OPS				
Total	214,983.04	219,714.44	152,002.16	152,002.16

Figure 25 Copy and paste prior year actuals.

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 26).
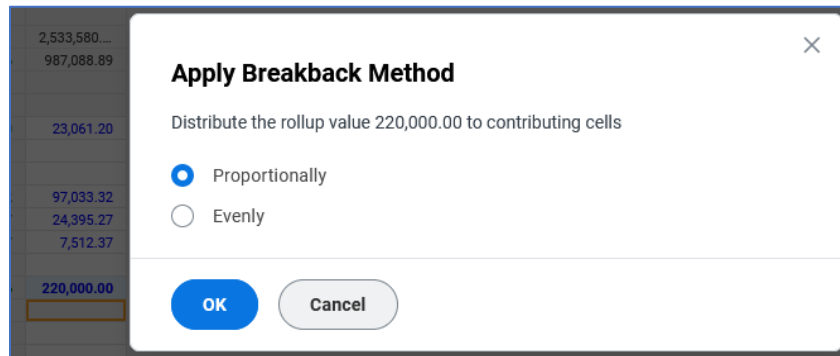
Apply Breakback Method   ×

Distribute the rollup value 220,000.00 to contributing cells

● Proportionally

○ Evenly

OK   Cancel

(Sidebar values: 2,533,580..., 987,088.89, 23,061.20, 97,033.32, 24,395.27, 7,512.37, 220,000.00)

Figure 26 Use the optional breakback method to distribute an amount proportionally.

See Figure 27 for the final result of proportionally budgeting $220,000 based on prior year actuals.

720000 - Budget OPS					
720001 - Budget OPS-Graduate Assistants	04	47,175.42	70,858.24	23,061.20	33,377.58
720002 - Budget OPS-Post Doc Associates	28	14,671.65			
720003 - Budget OPS-OPS Faculty					
720004 - Budget OPS-Temporary Employm	31	118,335.75	124,410.91	97,033.32	140,440.97
720005 - Budget OPS-Student Employmen	71	21,063.48	13,701.00	24,395.27	35,308.44
720006 - Budget OPS-OPS Fringe Benefits	90	13,736.74	10,744.29	7,512.37	10,873.01
720007 - Budget OPS-Other OPS					
Total	24	214,983.04	219,714.44	152,002.16	220,000.00

Figure 27 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 enter the total you want to breakback in the blue cell, it will be distributed accordingly (Figure 28).

720000 - Budget OPS				
720001 - Budget OPS-Graduate Assistants	47,175.42	70,858.24	23,061.20	10.00
720002 - Budget OPS-Post Doc Associates	14,671.65			
720003 - Budget OPS-OPS Faculty				
720004 - Budget OPS-Temporary Employmnt	118,335.75	124,410.91	97,033.32	75.00
720005 - Budget OPS-Student Employment	21,063.48	13,701.00	24,395.27	10.00
720006 - Budget OPS-OPS Fringe Benefits	13,736.74	10,744.29	7,512.37	5.00
720007 - Budget OPS-Other OPS				
Total	214,983.04	219,714.44	152,002.16	100.00

Figure 28 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 $220,000 being distributed proportionally based on a simulated percentage (Figure 29).

720000 - Budget OPS				
720001 - Budget OPS-Graduate Assistants	47,175.42	70,858.24	23,061.20	22,000.00
720002 - Budget OPS-Post Doc Associates	14,671.65			
720003 - Budget OPS-OPS Faculty				
720004 - Budget OPS-Temporary Employmnt	118,335.75	124,410.91	97,033.32	165,000.00
720005 - Budget OPS-Student Employment	21,063.48	13,701.00	24,395.27	22,000.00
720006 - Budget OPS-OPS Fringe Benefits	13,736.74	10,744.29	7,512.37	11,000.00
720007 - Budget OPS-Other OPS				
Total	214,983.04	219,714.44	152,002.16	220,000.00

Figure 29 The breakback amount has been distributed proportionally based on the "percentages" entered..

Transfers Tab

The third tab is for entering non-exchange transfers and viewing any overhead assessment amounts (Figure 30).
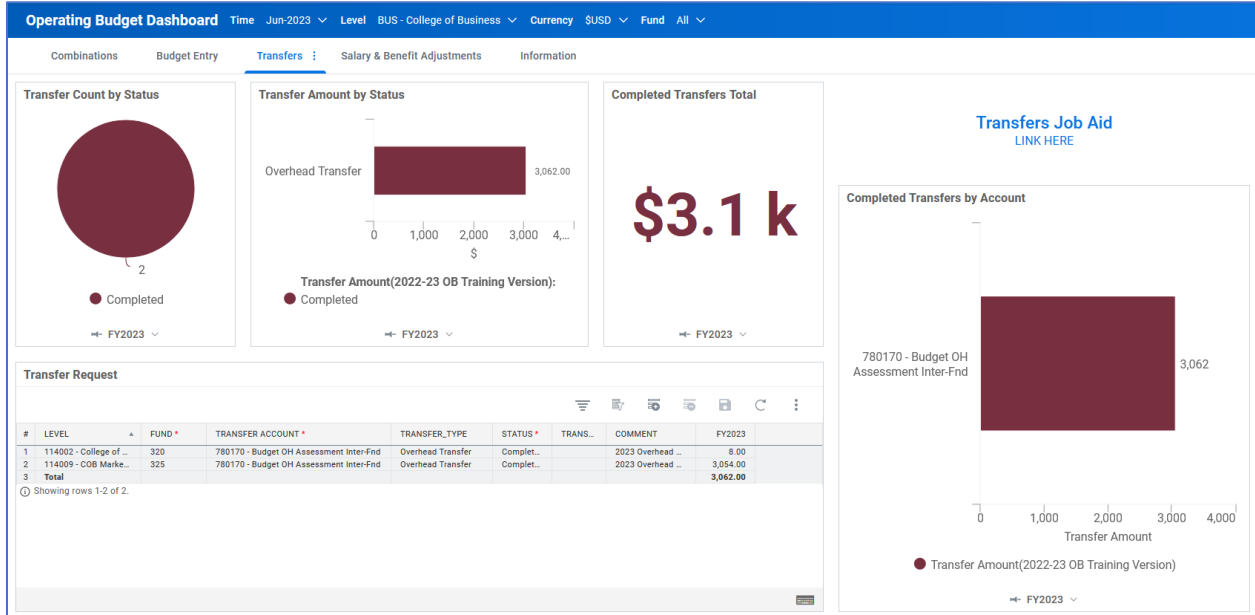

Figure 30 The Transfers tab provides an option to view and enter non-exhcnage transfers.

Transfer Requests are entered by adding a row and selecting the transfer accounts, amounts, and the department you are transferring to/from (Figure 31). Several widgets provide high-level details associated with transfers and a Transfer Request sheet for entering your transfers.
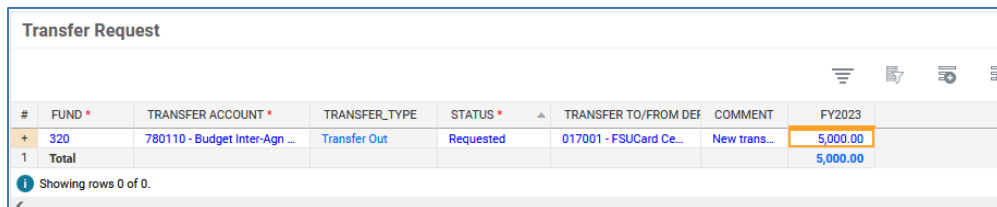

Figure 31 Enter non-exchange transfers for the upcoming fiscal year via the Transfers tab.

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 ( ).

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

#	RECURRENCE, ACCOUNTS BY TIME	FY2023
7	▼ 710299 - Budget Faculty Benefits	
8	710299 - Position Budgeting	
9	710299 - Override	
10	710299 - Adjustment	0.00
11	Total	**0.00**
12	▼ 710300 - Budget A&P	
13	710300 - Position Budgeting	59,766.20
14	710300 - Override	57,000.00
15	710300 - Adjustment	-59,766.20
16	Total	**57,000.00**

Figure 32 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 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, there will be a pop-up box to "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 (⊟).

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 33). 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.
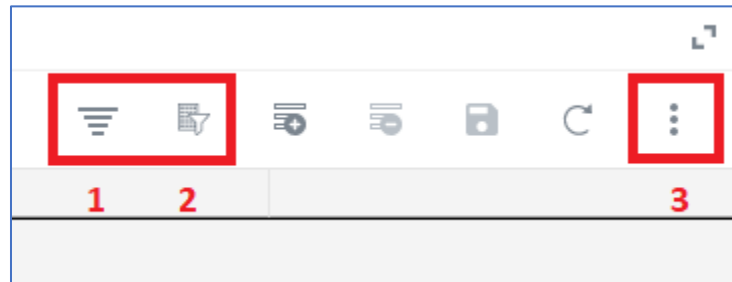
Figure 33 Display Options can be found in the toolbar above any sheet.

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 34 for a screenshot.
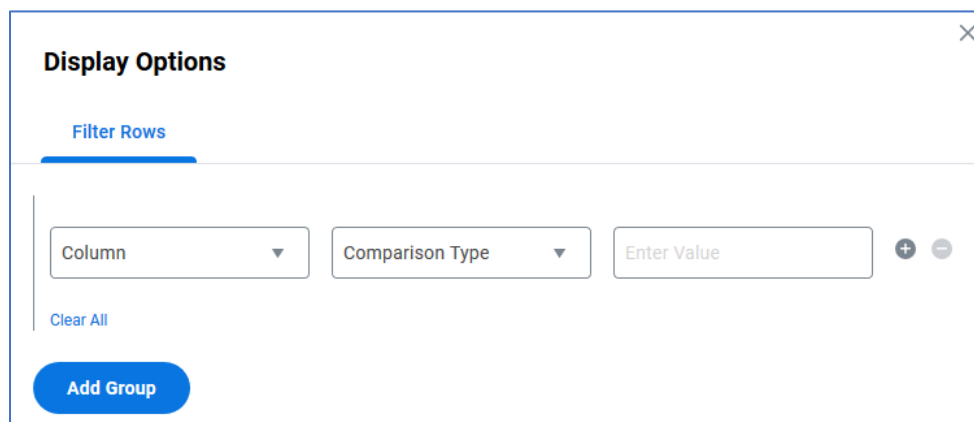

Figure 34 Display Options can be found in the toolbar above any sheet.

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 35.

Figure 35 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 36.

Figure 36 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

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 37 and 38 below.
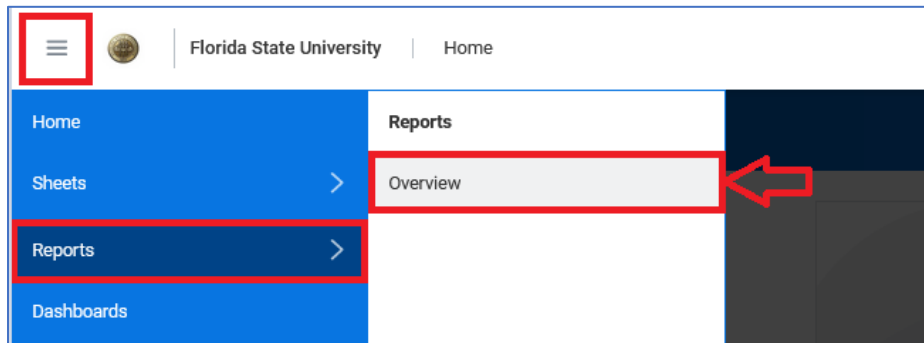

Figure 37 Select the "hamburger" icon in the top left, then "Reports," then "Overview" from the left-side menu.
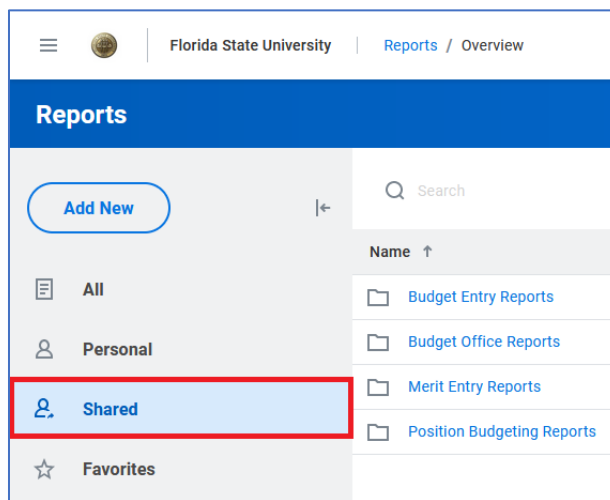

Figure 38 On the left, select "Shared" to view all shared reports. The reports are organized into folders.

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.