

Adaptive Planning 2023-24 Position Budgeting Manual

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General Notes

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

Sheets and Dashboards

Within ADP, you will use three primary means of viewing and entering data: Sheets, Widgets, and Dashboards. Sheets are dynamic spreadsheets used for specific data entry purposes. Widgets provide small pieces of data summarized as a single number, table, or chart/graph. Dashboards allow for a combination of Sheets and Widgets across multiple tabs.

Versions

The use of Versions keeps datasets separate within Adaptive Planning (ADP). Versions distinguish datasets by purpose or time frame related to a specific activity. For example, the 2023-24 Operating Budget Version encompasses both Position Budgeting and Budget Entry (see Figure 1). There are also Versions for individual pay periods for rate tracking purposes.

The system has a default Version, but you may have access to other versions with the menu in the top-right corner. The system will remember your preferred Version after entering and saving data. See below for a screenshot of the Version selection. If the data you’re viewing is unexpected, please verify you’ve selected the correct version.

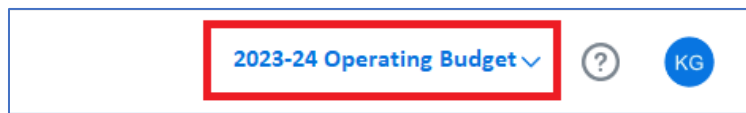


Figure 1 View and select the “Version” in the top-right corner of the screen.

Position Edit Access by Home Department

Home Departments are used to control access to edit/adjust data within Position Budgeting and Position Transfers. While a particular department may fund a position, the position “belongs” to the designated Home Department. Therefore, positions are listed by their Home Departments rather than their funding departments within Adaptive Planning.

Position View Access by Funding Department

If you are a Budget Preparer, you will have view-only access to Position Budgeting by Funding Department based on which departments you are designated as the Budget Preparer. If you are also a Salary Preparer, you will retain edit access to positions based on the Home Departments you are designated as Salary Preparer for. In other words, if you are both a Budget Preparer and Salary Preparer, you will have edit access to positions

based on their Home Department, and may have additional view-only access to portions of positions based on their Funding Department.

Levels

Within OMNI Financials, Budget Preparer designations are made for individual Department IDs. These designations are reflected within Adaptive Planning (ADP) as “Levels” (see Figure 2). For example, if John Smith is the Budget Preparer for Department 123000, his Levels will include Department 123000. (NOTE: There is an important distinction between Home Departments and Funding Departments. Please see the previous section for more details.) Outside of Position Budgeting, Levels act as a security/access mechanism for Budget Entry and identify the Department ID within FSU’s department tree hierarchy.

Depending upon the Sheet or Dashboard you are using or the specific department you are entering the budget for, you may need to change your Level selection in the blue ribbon below the top of the screen (see Figure 3). On some Sheets, the selection is made on the right side of the blue ribbon (below Version selection) or in the middle of the blue ribbon. See below for screenshots.

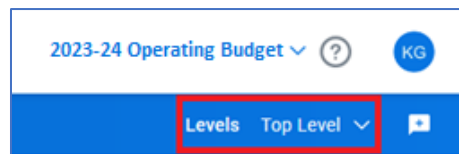


Figure 2 Some sheets have the Level selection on the right side of the ribbon.

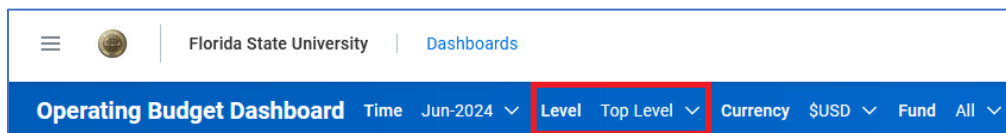


Figure 3 On Dashboards, the Level selection is typically in the middle of the ribbon.

Preferences

Adaptive Planning will save preferences as you use the system. These include saving selections for Version, Level, Display Options and Filters, and column widths, among many others. If you adjust a column’s width and wish to keep that column width as your default preference, click the save (diskette) icon in the toolbar.

Suppose you arrive on a screen where the data is unexpected. In that case, you may want to review your selections for Version, Level, Display Option, or other possibilities for why the information is not what you expected. Please keep these preference settings in mind when navigating the system.

Text and Cell Styles

Adaptive Planning uses text and cell style/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 types of data 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 other browsers may also work. Please ensure your browsers are up to date before using Adaptive Planning. If you have any technical issues related to your browser use, please get in touch with the Budget Office (budget@fsu.edu).

Login

Authorized users may log in through the Adaptive Planning portal or myFSU (both via CAS/SSO). The direct URL to the Adaptive Planning portal is:

<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 4).

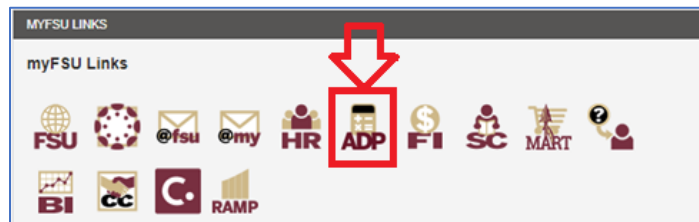


Figure 4 Access Adaptive Planning via the calculator icon on the myFSU portal.

Position Budgeting Dashboard

Overview

The Position Budgeting Dashboard provides a single access point for all changes to positions. For example, changing the incumbent in a position, changing the base pay of a position, transferring a position between home departments, or adjusting the funding distribution of a position are all changes that may be made on the Position Budgeting Dashboard.

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

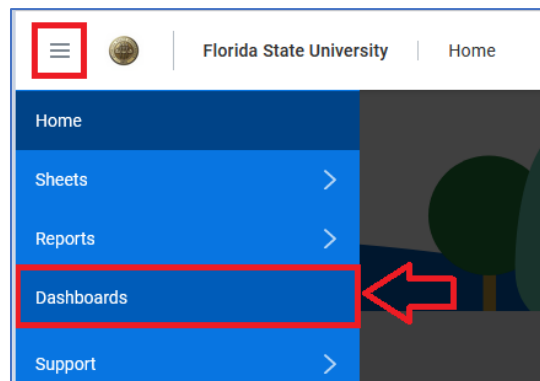


Figure 5 Select “Dashboards” from the left-hand menu.

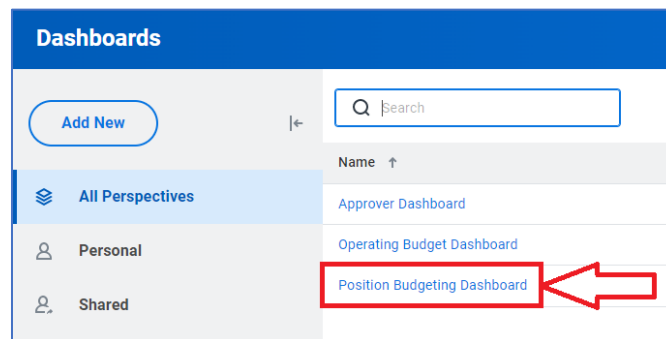


Figure 6 Select “Position Budgeting Dashboard” from the list of available dashboards.

The Position Budgeting Dashboard provides edit access to Salary Preparers and view only access to Budget Preparers. As a Salary Preparer, you will be able to view and edit all the positions associated with your Home Department designation(s) and their various funding sources. Please keep in mind that you may control a position whose funding resides outside of your purview.

Along the top of the dashboard, there is a blue ribbon that provides some useful ways of filtering your data (Figure 7). (NOTE: Selections for Time and Curreny should never be adjusted.)

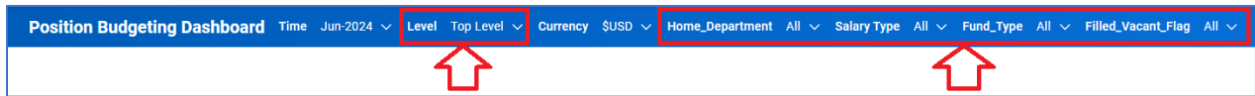


Figure 7 The blue ribbon provides an easy and quick means to filter data.

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

There are three tabs on the Position Budgeting Dashboard: (1) Position Budgeting, (2) Position Transfers, and (3) Instructions & Resources. The Position Budgeting tab is the primary tab and contains all position data elements necessary to the budgeting process. The Position Transfers tab provides a means to request and/or record any position transfers between home departments. Finally, the Instructions & Resources tab provides some essential information and links to resources (including this user manual) all in one place. See Figure 8 for a screenshot.

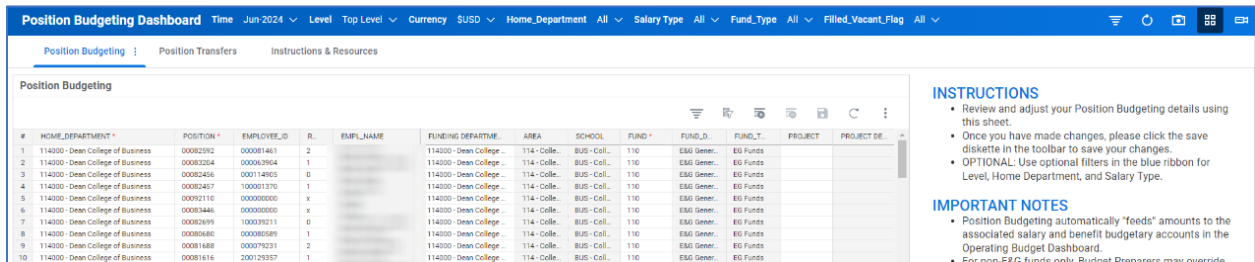


Figure 8 The Position Budgeting Dashboard has three tabs. Each serves a separate function.

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

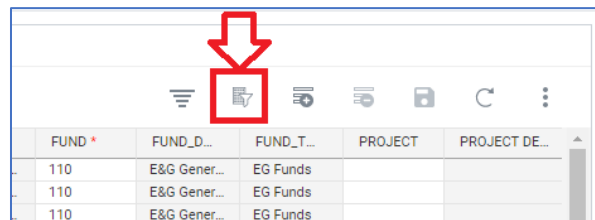


Figure 9 Select the “Display Options” icon to customize how you filter data.

Changes to positions/employees

Except for transferring positions, all changes to a position will be made on the Position Budgeting tab. The sections below include step-by-step instructions for various actions you may need to take to adjust your positions, salary, and benefits.

Add a “To Be Hired” (placeholder) position

A “To Be Hired” position is used as a placeholder for new positions which have not yet been established in OMNI HR. If you know there will be a new position created in the upcoming fiscal year, then creating a “To Be Hired” position will be necessary.

To add a “To Be Hired” position, you may add a new row or copy an existing row. It will typically save time to copy an existing position with similar characteristics rather than adding a new position and filling in all the details from scratch. This section will describe the copy row method.

- 1) Identify a position that is similar to the position you’d like to create. Right-click on the position you wish to copy and select “Copy Row” from the drop-down menu to create a copy. (Alternatively, you can click the “add row” icon in the blue toolbar to create a blank row).

#	HOME_DEPARTMENT *	POSITION *	EMPLOYEE_ID	RC
1	076000 - Classics	00058197	200206497	0
2	076000 - Classics	00056778	000038856	0
3	076000 - Classics	00057715	000000000	x
4	076000 - Classics	00082642	000095647	3
5	076000 - Classics	000829		1
6	076000 - Classics	000820		0
7	076000 - Classics	000538		0
8	076000 - Classics	000538		1
9	076000 - Classics	000553		2
10	076000 - Classics	00054		0
11	076000 - Classics	00054		1
12	076000 - Classics	000552		0
13	076000 - Classics	000517		1
14	076000 - Classics	000519		1
15	076000 - Classics	000518		x
16	076000 - Classics	00055983	000036194	0

Clear

Add Row

Copy Row

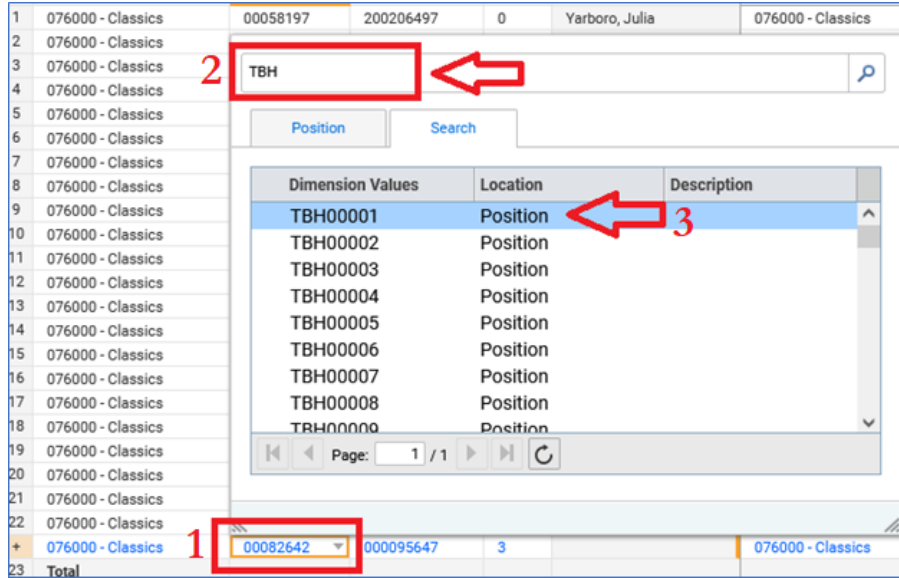
Delete Row

Row Details

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

14	076000 - Classics	00051959	000099092	1
15	076000 - Classics	00051891	000000000	x
16	076000 - Classics	00055983	000036194	0
17	076000 - Classics	00051867	000066173	1
18	076000 - Classics	00051869	000000000	x
19	076000 - Classics	00051870	000007707	0
20	076000 - Classics	00051872	000006295	0
21	076000 - Classics	00051875	000000000	x
22	076000 - Classics	00054919	000113036	0
+	076000 - Classics	00082642	000095647	3

- 2) Change the position number of the copied row (indicated by blue text) to a “TBH” position. Select the down arrow next to the position number and type “TBH” into the search bar at the top. Select one of the TBHxxxxx positions listed.



- 3) Change the Employee ID of the new row. You may use the vacant placeholder (“000000000”) or the “To Be Hired” placeholder (“999999999”). If you select the vacant placeholder (“000000000”), please make sure to adjust the Employee Rcd to “x” for consistency with the other vacancies.

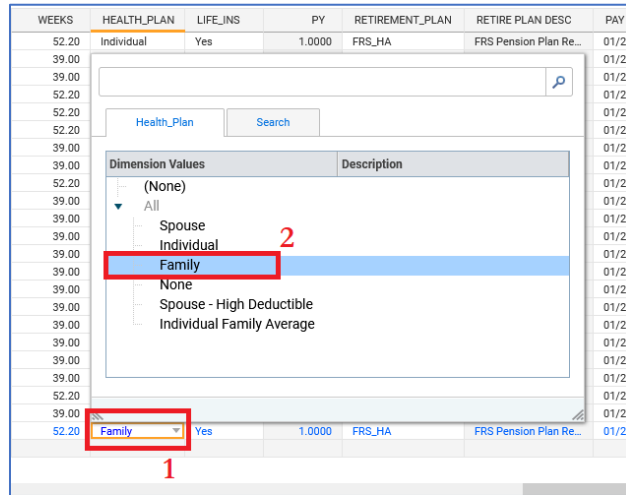
076000 - Classics	00051867	000066173	1	
076000 - Classics	00051869	000000000	x	
076000 - Classics	00051870	000007707	0	
076000 - Classics	00051872	000006295	0	
076000 - Classics	00051875	000000000	x	
076000 - Classics	00054919	000113036	0	
076000 - Classics	TBH00001	999999999	0	To Be Hired
Total				

- 4) Change any remaining elements for the position such as Funding Department, Fund, Salary, Distribution %, etc.
- 5) Once you have made all your changes, click the save (diskette) icon on the blue toolbar at the top.

Change properties

To change the properties of a position, make your changes within the desired rows. The specific element(s) that you’ve changed will turn black to blue, indicating that the data is not saved.

- Depending on the properties you wish to change, you may select the drop-down menu to change the property or type in the amount. For example, if you wish to change the Health Insurance plan, hover over the cell you wish to change, left-click the down arrow, and select the new health insurance plan from the menu. Once you've made your changes, click the save (diskette) icon.



Alternatively, for amounts, type the new value into the cell. Below is a change to FTE.

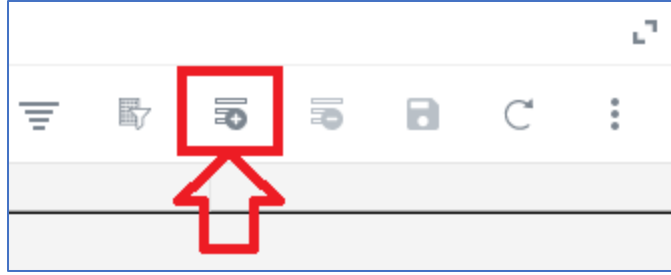
y	90019S	Professor	9 Mo SAL	1.0000	1.00000	20E
y	90029S	Asoc Professor	9 Mo SAL	1.0000	1.00000	20E
y	90039S	Asst Professor	9 Mo SAL	1.0000	1.00000	20E
y	90019S	Professor	9 Mo SAL	1.0000	1.00000	20E
y	90029S	Asoc Professor	9 Mo SAL	1.0000	1.00000	20E
	0114	Office Administrator		1.0000	1.00000	31E
y	90019S	Professor	9 Mo SAL	1.0000	1.00000	20E
y	9060AS	Teaching Faculty I	12 Mo S...	0.5000	1.00000	20E
				22.5000		

NOTE: If a position is split funded, please make sure all applicable rows are adjusted and all distribution percentages add up to 100%.

Transfer a position to a different home department

To transfer a position to a different home department, you will select the Position Transfer tab on the Position Budgeting Dashboard. This is true even if the position transfer is between two home departments that you control. The Position Transfer sheet acts as a record for all transfers.

- To request or record a position transfer, click the Add Row icon in the toolbar to create a new row.



- 2) In the new row, select the position number you wish to transfer. Then select the home department you wish to transfer it from (note: this should be the current home dept) and the home department to transfer it to. The fourth column (“Home Dept (Y/N)”) is a flag that will let you know whether the To Home Department is a home department. Set the status to Requested and enter any comments. Once you’ve made your entries, click the save (diskette) icon in the toolbar.

#	POSITION	FROM HOME DEPARTMENT	TO HOME DEPARTMENT	HOME_DEPT_(Y/N)	STATUS	COMMENTS
1	00058004	058000 - Instruction & Research Reserve	074000 - Biological Science	Y	Completed	
2	00058035	046005 - Institutional Research	046006 - Institutional Rsrch Overhead	N	Completed	
3	00058645	058000 - Instruction & Research Reserve	057000 - Provost & VP Academic Affairs	Y	Completed	
4	00051001	001000 - President's Office	001009 - Student Veterans Center	Y	Completed	
5	00051017	057000 - Provost & VP Academic Affairs	047000 - University Relations	Y	Completed	
+	00051166	076000 - Classics	083000 - Philosophy	Y	Requested	Transfer to Philos...

- 3) If the To Home Department is within your control, you may navigate back to the Position Budgeting tab and complete the transfer yourself. Otherwise, the Budget Office will do that for you.

Zero out a position

If you wish to zero out the budgetary effects of a position, this can be done by setting the salary to \$0.00 and changing the health and life insurance selections to None and No, respectively.

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

SALARY	SAL ADJ %	ADJUSTED SALARY
0.00	0.0000%	33,005.08
53,355.78	0.0000%	53,355.78
43,803.80	0.0000%	43,803.80
45,785.88	0.0000%	45,785.88

- 2) Scroll to the right and change the Health Plan and Life Insurance plan to None and No, respectively.

ADMIN_DESC	WEEKS	HEALTH_PLAN	LIFE_INS	PY
None	52.20	None	No	1.0000
None	52.20	Individual	Yes	1.0000
None	52.20	Individual	Yes	1.0000
None	52.20	Group	Yes	1.0000

3) Click the save (diskette) icon in the toolbar.

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

Change base pay or additional pay amount

To change base pay or additional pay amounts, change the amounts in the cells. The text will turn blue, letting you know that the data is unsaved.

- 1) If you're changing the base pay or ADS pay amount, enter the new amount in the Salary column. (**Note:** If the position has an additional pay, please make sure you're adjusting the correct cell. Shift differential amounts – SF1 and SF5 – will be automatically calculated in the Adjusted Salary column based upon any changes made in the Salary column.) The pay type is indicated in the column immediately before the Salary column.

SC	PAY_TYPE	SALARY	SAL ADJ %	ADJUSTED SALARY
	Base Pay	76,120.97	0.0000%	76,120.97
	Base Pay	200,000.00	0.0000%	181,533.84
	ADS	23,274.00	0.0000%	23,274.00
	Base Pay	174,613.69	0.0000%	174,613.69

- 2) For split funded positions, be sure to change the base pay on each funding distribution row.
- 3) Once you've made your changes, click the save (diskette) icon in the toolbar.

Change existing funding distribution

This section will provide step-by-step instructions for changing the funding distribution of a current split funded position. (Note: For adding a *new* funding split, please see the next section for instructions.)

- 1) To change the funding split of existing funding distributions, type in the new funding distribution amounts related to the position so that the total distribution amount for the pay type totals 100%. Click the save (diskette) icon to save your changes.

PAY_TYPE	SALARY	SAL ADJ %	ADJUSTED SALARY	DIST %
Base Pay	78,000.00	0.0000%	78,000.00	100.000%
Base Pay	52,000.00	0.0000%	52,000.00	100.000%
Base Pay	42,864.00	0.0000%	42,864.00	100.000%
Base Pay	125,000.00	0.0000%	125,000.00	100.000%
Base Pay	75,987.79	0.0000%	75,987.79	10.000%
Base Pay	75,987.79	0.0000%	75,987.79	90.000%

Add a new funding distribution

To add a new funding distribution, you will need to create a new row for a position and add the new funding source, fund, and distribution.

- 1) Right-click on the position you wish to add a new funding source for and select Copy Row from the popup menu. (Note: Copied rows will appear in the last row of data. If you have many rows, you may need to scroll down.)

#	HOME_DEPARTMENT *	POSITION *	EMPLOYEE_ID	RCD	EMPL_NAME	FUNDING DE
1	013000 - Business Services	00051108	000068121	0		013000 - Bus
2	013000 - Business Services	00051108	000068121	0		017000 - FSU
3	Total					

Showing rows 1-2 of 2.

Clear

Add Row

Copy Row

- 2) Adjust the funding department and fund associated with the copied row.

FUNDING DEPARTMENT	AREA	SCHOOL	FUND *
013000 - Business Services	013 - Busi...	FIN - AVP Financ...	320
017000 - FSUCard Center	017 - Bus ...	FIN - AVP Financ...	110
017001 - FSUCard Center Auxiliary	017 - Bus ...	FIN - AVP Financ...	320

- 3) Finally, adjust the funding distribution percentages accordingly. The total distribution should add up to precisely 100%.

PAY_TYPE	SALARY	SAL ADJ %	ADJUSTED SALARY	DIST %
Base Pay	75,987.79	0.0000%	75,987.79	5.000%
Base Pay	75,987.79	0.0000%	75,987.79	80.000%
Base Pay	75,987.79	0.0000%	75,987.79	15.000%
				100.000%

- 4) Click the save (diskette) icon to save your changes.

Add/Remove employee to/from a position

To add or remove an employee to/from a position, adjust the employee ID in the associated position. Note: If the position is split funded, you must change each row.

- 1) To add an employee to a vacant position, select the down arrow next to the Employee ID and enter the new employee's ID. Click the save (diskette) icon to save.

POSITION *	EMPLOYEE_ID	RCD	EMPL_NAME	FUNDING DEPARTMENT	AREA
00053866	000056438	U		069000 - Earth, Ocean ...	069 - Ea
00053872	000006162	0		069000 - Earth, Ocean ...	069 - Ea
00053909	000000000	x	Vacant	069000 - Earth, Ocean ...	069 - Ea
00053913					
00055297	000061981				
00054031					
00054032					
00054038					
00057708					
00057746					
00055550	000061081		Employee ID		Clockner, Kenneth

- 2) To make a position vacant or change it to a To Be Hired employee placeholder, click on the down arrow next to the Employee ID and select either "000000000" for vacant or "999999999" for a To Be Hired placeholder. Click the save (diskette) icon to save.

POSITION *	EMPLOYEE_ID	RCD	EMPL_NAME	FUNDING DEPARTMENT	AREA
00058194	000025230	0		069000 - Earth, Ocean ...	069 - Earth
00058393					
00056826	000000000				
00056827					
00058507					
00058508					
00056794					
00058398					
00057727	000000000		Employee ID		Vacant
00057750					

Add/Remove an additional pay

To add an additional pay, copy an existing base pay row, adjust the pay type, and salary amount. To remove an additional pay, simply delete the additional pay row.

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

HOME_DEPARTMENT *	POSITION *	EMPLOYEE_ID
069000 - Earth, Ocean & Atmospheric Sci	00053909	000000000
069000 - Earth, Ocean & Atmospheric Sci	000539	
Total		

Showing rows 1-1 of 1.

- Clear
- Add Row
- Copy Row**
- Delete Row
- Row Details

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

PAY_TYPE	SALARY	SAL ADJ %	ADJUSTED SALARY	DIST %	COMP / D
Base Pay	111,896.00	0.0000%	111,896.00	100.000%	111
ADS	15,000.00	0.0000%	111,896.00	100.000%	111

Pay_Type Search

Dimension Values	Description
(None)	
All	
Base Pay	
ADS	
SF1	
SF5	
SFN	

- 3) To delete an additional pay, right-click on the specific row associated with the additional pay and select Delete Row. Once the row has been deleted, click the save (diskette) icon in the toolbar to save your changes.

POSITION *	EMPLOYEE_ID	RCD	EMPL_NAME	PAY_TYPE	SALARY	SAL
00053909	000000000	x	Vacant	Base Pay	111,896.00	0
00053909	000000000	x	Vacant	ADS	15,000.00	0

Clear

Add Row

Copy Row

Delete Row

Display Options and Filters

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

The tools for Display Options and Filters can be found in the toolbar at the top right of any sheet (Figure 10). In the screenshot below, there are buttons to (1) Filter, (2) Display Options, and (3) Sheet Menu. Detailed explanations of each are provided below the screenshot.

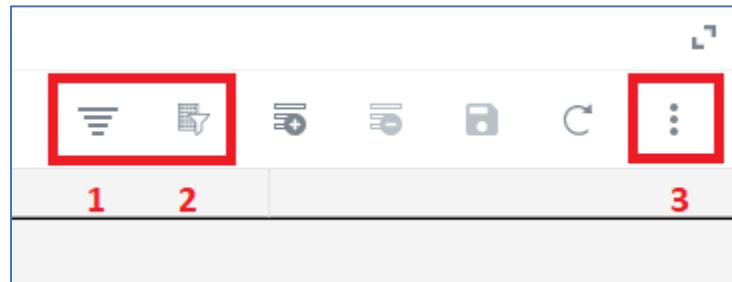


Figure 10 Display Options can be found in the toolbar above any sheet.

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 11 for a screenshot.

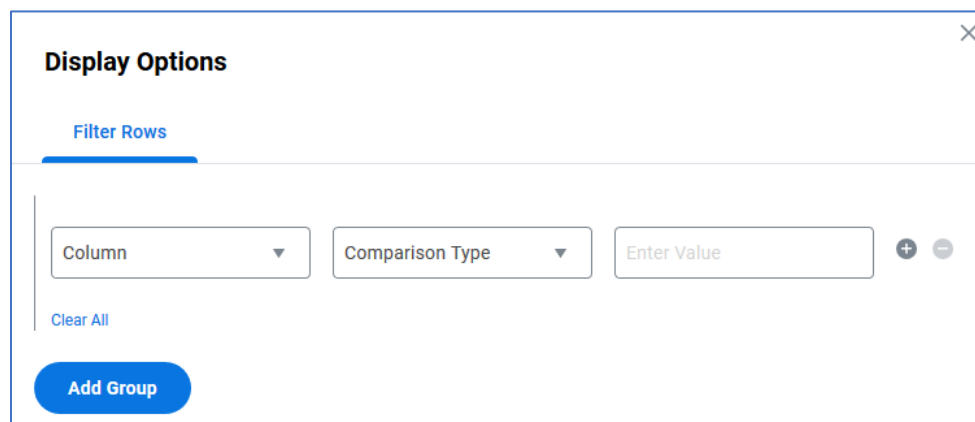


Figure 11 Display Options can be found in the toolbar above any sheet.

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 12.

The screenshot shows a 'Display Options' dialog box with a close button (X) in the top right corner. Under the 'Filter Rows' tab, there is a single filter row. The first dropdown menu is labeled 'School' and has a downward arrow. The second dropdown menu is labeled 'is' and also has a downward arrow. The third dropdown menu is labeled 'AS - College of Arts ...' and has a downward arrow. To the right of these three dropdowns are two small circular buttons, one with a plus sign (+) and one with a minus sign (-). Below the filter row is a 'Clear All' link. At the bottom of the dialog is a blue button labeled 'Add Group'.

Figure 12 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 13.

The screenshot shows the same 'Display Options' dialog box as in Figure 12, but with two filter rows. The first row is identical: 'School' dropdown, 'is' dropdown, 'AS - College of Arts ...' dropdown, and plus/minus buttons. Between the two rows, the word 'AND' is displayed in grey text. The second row consists of a 'Pay Plan' dropdown, an 'is' dropdown, and a 'Faculty' dropdown, followed by plus/minus buttons. Below the second row is a 'Clear All' link. At the bottom is a blue 'Add Group' button.

Figure 13 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 14 and 15 below.

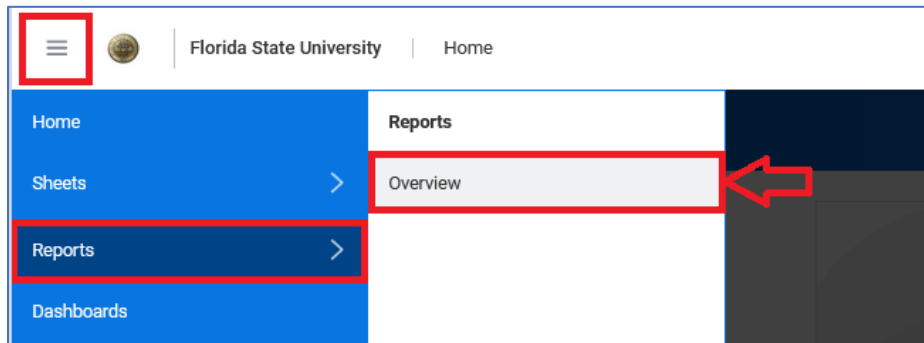


Figure 14 Select the “hamburger” icon in the top left, then “Reports,” then “Overview” from the left-side menu.

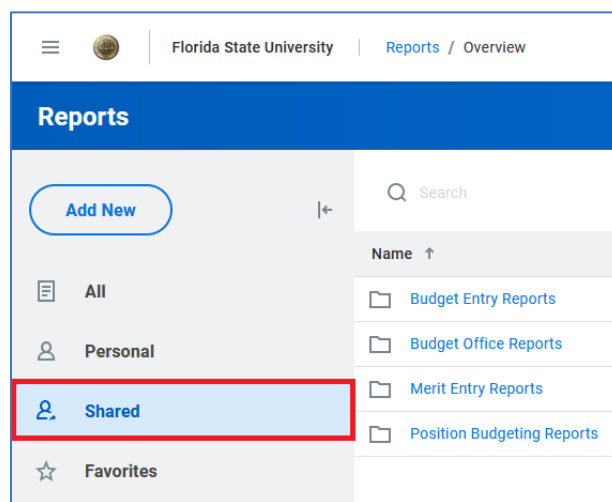


Figure 15 On the left, select “Shared” to view all shared reports. The reports are organized into folders.

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.