

**Overview**

This document provides you with some Quick Tips to make your use of Adaptive more streamlined and efficient.

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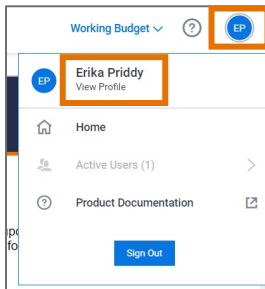
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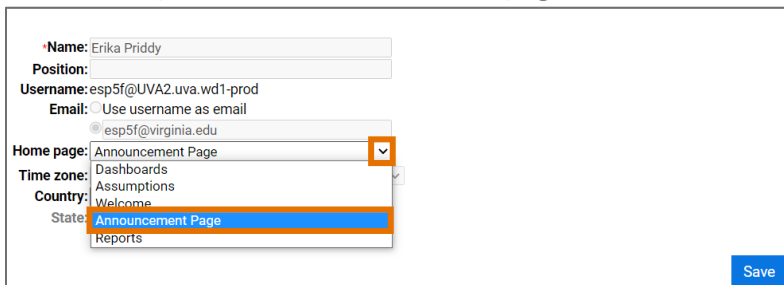
**Setting the Announcements Page as your default Home Page**

Once logged into Adaptive:

1. Select the user icon in the upper right-hand corner, then click **View Profile**.



2. Click the drop-down menu next to Home page and select **Announcement Page**.



3. Click **Save**.

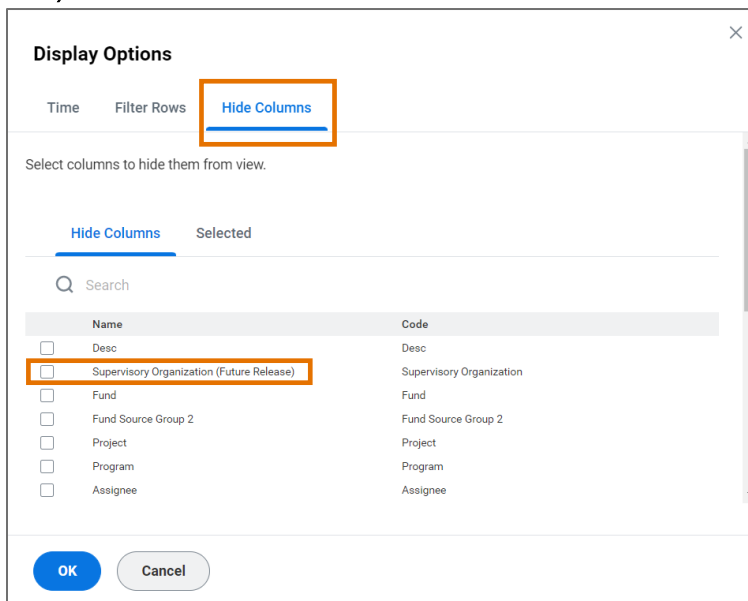
## Hide the Supervisory Org Column

Once a sheet is open:

1. Click on the **Display Options** icon in the toolbar:



2. Click on the **Hide Columns** tab, then check the box next to **Supervisory Organization (Future Release)**.



3. Click **OK**.



Avoid hiding columns on a regular basis, as it is easy to forget they are hidden. Hidden columns could hide data.

## Displaying Years instead of Months/Quarters

Once a sheet is open:

1. Click on the **Display Options** icon in the toolbar:



- Click on the **Time** tab, then check the box(es) in the **Year** column for the year(s) you want to display. Uncheck the box(es) in the **Month** and **Quarter** columns if you do not want Months and Quarters to display.

- Click **OK**.

## Deleting Unwanted Rows



Only use Delete Row if you are correcting an error, such as a row added/duplicated in error or to delete a row that is no longer needed.

Even if the dollars are \$0, there are often reasons to keep a line (keeping notes or remembering a person who was once in the budget, for example). Only delete if you are sure you do not need it anymore.

- Select the row you want to delete.  
To Select an entire row (as opposed to individual cells), click in the Row # cell.

1	31765 - AS-English-Eng Lit Ops	31690 PV-Book #	6035089
2	31735 - AS-Drama Operations	31735 AS-Drama	2386513
3	31805 - AS-French Lit-Gen Linguistics	31805 AS-French	1857995

- Select the Delete Row icon on the toolbar (or Right Click on the highlighted row(s) and select **Delete Row(s)**).



- Confirm you wish to delete the row(s).  
When prompted, select **Delete**. Otherwise, select **Cancel**.

## Cleaning up Conversion Placeholders

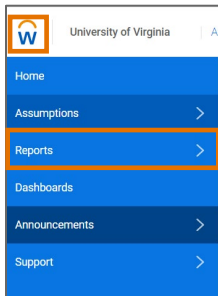


Placeholders for Gifts, Grants, and Designated came over in conversion and would appear in Input Sheets in the Gift Grant Designated column (GF999997, GR099999, DN999999).

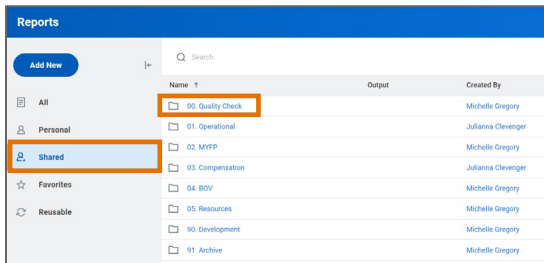
If a conversion placeholder worktag remains, the data will not appear in reports. There is a new Quality Check report available to help identify where the conversion placeholder worktags appear so that you can find and replace them.

Once logged into Adaptive:

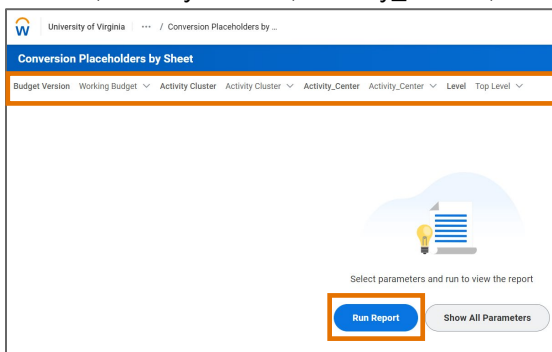
1. Navigate to Reports.



2. Click on **Shared** in the menu, then click on the folder titled **00. Quality Check**



3. Click on the folder titled **01. Error Checking**
4. Click on the report titled **Conversion Placeholders by Sheet**.
5. Select the parameters you want for the report by using the drop-down arrows next to Budget Version, Activity Cluster, Activity\_Center, and Level, as desired. Then click **Run Report**.





6. Analyze the report results to determine which sheets contain DN999999, GR099999 or GF999997.

Input Sheet		FY2023
Non-Compensation Sheet	GR099999 Grant Placeholder GL Clearing	737,165
	Subtotal	737,165
Revenue Sheet	DN999999 Conversion Placeholder	(64,313)
	GR099999 Grant Placeholder GL Clearing	(800,000)
	Subtotal	(864,313)
Wage Sheet	GR099999 Grant Placeholder GL Clearing	59,000
	Subtotal	59,000
Transfers Sheet	DN999999 Conversion Placeholder	(316,794)
	Subtotal	(316,794)
	Grand Total	(384,942)

7. Navigate to each sheet listed and clean up the worktags by doing the following:
  - a. Ensure you are in the Working Budget at the appropriate Cost Center Level.
  - b. Click on the Filter icon in the toolbar, then type in the filter(s) you want (GF999997, GR099999, DN999999).
  - c. Replace all conversion placeholders with either a real Gift, Grant or Designated worktag, or a usable Placeholder from this list (Note: The grant placeholders start with DN, not GR):

DN002042 Placeholder FD005 Unrestricted Sponsored Program Indirect Recovery Fund
DN002043 Placeholder FD006 Unrestricted Sponsored Program Fund
DN002045 Placeholder FD021 Restricted Federal Sponsored Program Fund
DN002046 Placeholder FD022 Restricted Federal Sponsored Program Fund-Work Study
DN002047 Placeholder FD069 Unrestricted Sponsored Program Residual Fund
DN002048 Placeholder FD084 Restricted Private Sponsored Program Fund
GF999980 Placeholder Gift from R&V
GF999981 Placeholder Endowment from R&V
GF999982 Placeholder Gift from Foundation
GF999983 Placeholder Endowment from Foundation
GF999984 Placeholder Unrestricted Gift
GF999985 Placeholder Unrestricted Endowment

## Navigating Other Resources

	Quick Reference Guides: <a href="#">Navigating in Adaptive Sheets</a> <a href="#">Navigating in Adaptive Reports</a>
	PDF of training slides for Introduction to Budgeting at UVA: <a href="https://uvafinance.virginia.edu/resources/introduction-budgeting">https://uvafinance.virginia.edu/resources/introduction-budgeting</a>