

Overview

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

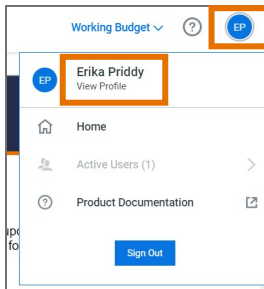
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Setting the Announcements Page as your default Home Page

Once logged into Adaptive:

1. Select the **User** icon (your initials) in the upper right corner of the screen, then click **View Profile**.



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

3. Click **Save**.

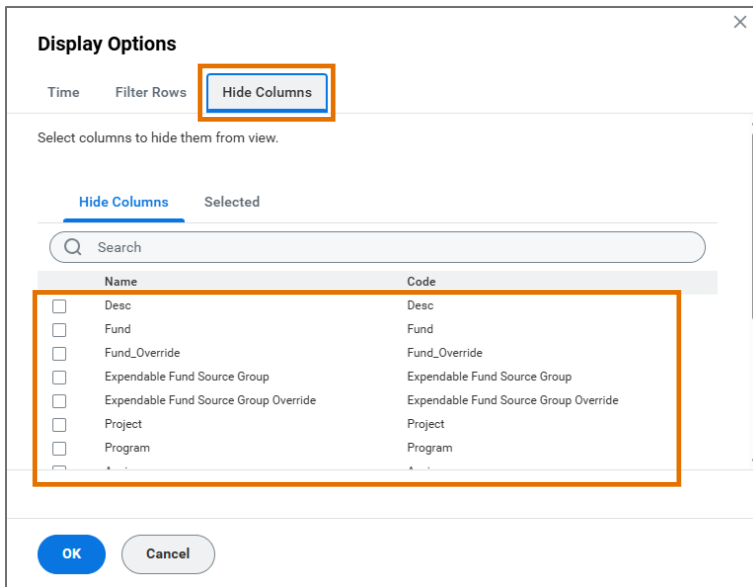
Hiding a Column

Once a sheet is open:

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



2. Click on the **Hide Columns** tab.
3. Select the check box next to the columns you want to hide.



4. 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:



2. Click on the **Time** tab (if it is not already selected).

3. Do the following:

- Select the check box(es) in the **Year** column for the year(s) you want to display.
- Clear (deselect) the check box(es) in the **Month** and **Quarter** columns if you do not want Months and Quarters to display.

4. 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 (for example, keeping notes or remembering a person who was once in the budget). Only delete a row if you are certain you do not need it anymore.

1. Select the row you want to delete.

To Select an entire row (as opposed to individual cells), click in the Row # cell. Hold the **Shift** key down to select multiple rows.

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

2. Click the **Delete Row** icon on the toolbar (or right-click on the highlighted row and select **Delete Row**).



3. Confirm you want to delete the row(s).

When prompted, select **Delete**. Otherwise, select **Cancel**.

Cleaning up Conversion Placeholders

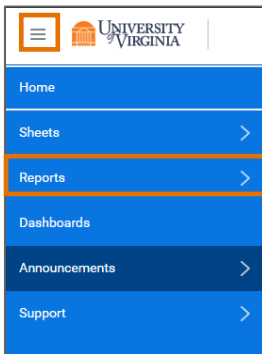


Placeholders for Gifts, Grants, and Designated came over in conversion and would appear in Input Sheets in the Gift Grant Designated column (GF999997, GR099999, DN999999).

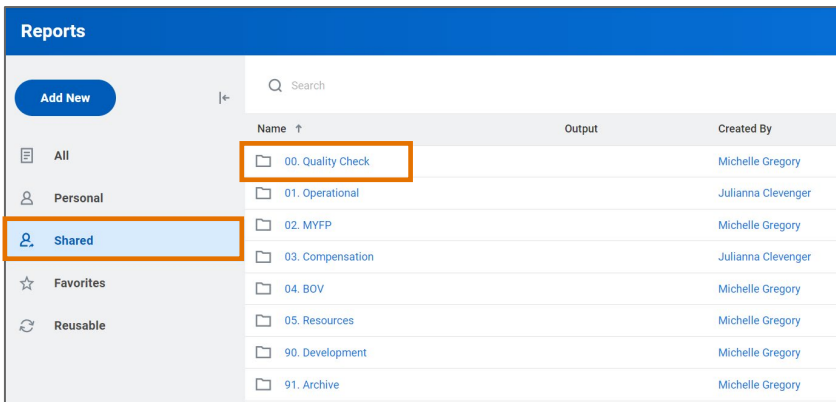
If a conversion placeholder worktag remains, the data will not appear in reports. There is a new Quality Check report available to help identify where the conversion placeholder worktags appear so that you can find and replace them.

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**.

- Select the parameters you want for the report by using the drop-down arrows next to each field (e.g., Budget version, Activity Center, etc.).

Select Prompting Parameters

Conversion Placeholders by Sheet

Budget Version Working Budget ▼

Budget Year FY2025 ▼

Activity Cluster Activity Cluster ▼

Activity Center Activity_Center ▼

Level (CC) Top Level ▼

Expendable FD Source Gr... FDH201 Expendable Operatin... ▼

Run Report
Cancel

- Click **Run Report**.
- Analyze the report results to determine which sheets contain DN999999, GR099999 or GF999997.



Conversion Placeholders by Sheet		
		FY2023
Input Sheet		
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)

Adaptive Planning – Quick Tips

8. Navigate to each sheet listed and clean up the worktags by doing the following:
- Ensure you are in the Working Budget at the appropriate Cost Center Level.
 - Click the **Filter** icon in the toolbar, then type in the filter(s) you want (GF999997, GR099999, DN999999).
 - 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 to Other Resources

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