Overview

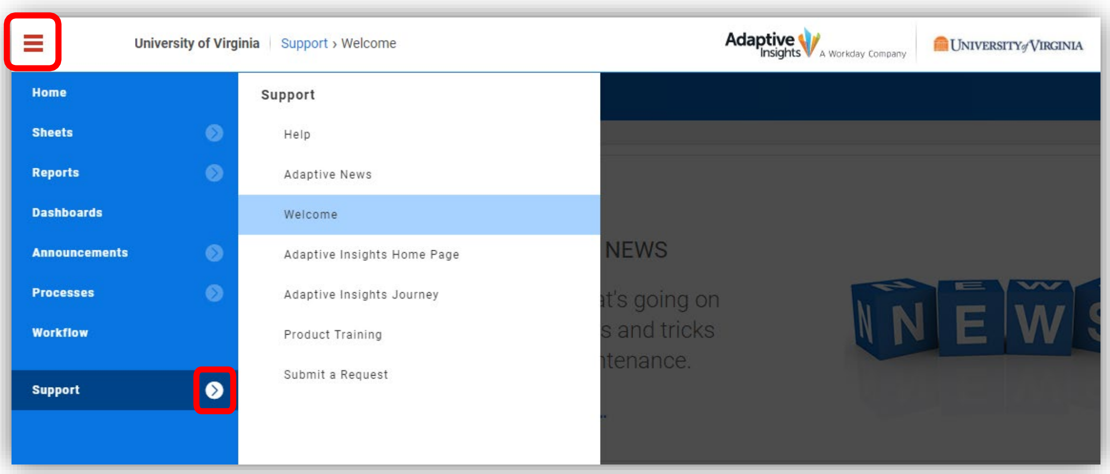
This Quick Reference Guide should serve as an orientation to basic navigation in Adaptive Insights including:

- Logging in and homepage navigation
- Sheets
- Reports

Procedure

<table>
<tr><th colspan="2">Homepage Navigation</th></tr>
<tr><td>1.</td><td>Access Adaptive Insights to go to the login screen. Type in your username (your UVA email, including @virginia.edu) and password.

The page that appears is the Adaptive Insights Homepage. This is customizable (see separate Quick Reference Guide), but the default has sections for Adaptive News, Documentation, and Training.</td></tr>
<tr><td>2.</td><td>The main point of navigation is the Adaptive Insights “hamburger icon” or “triple stack”:

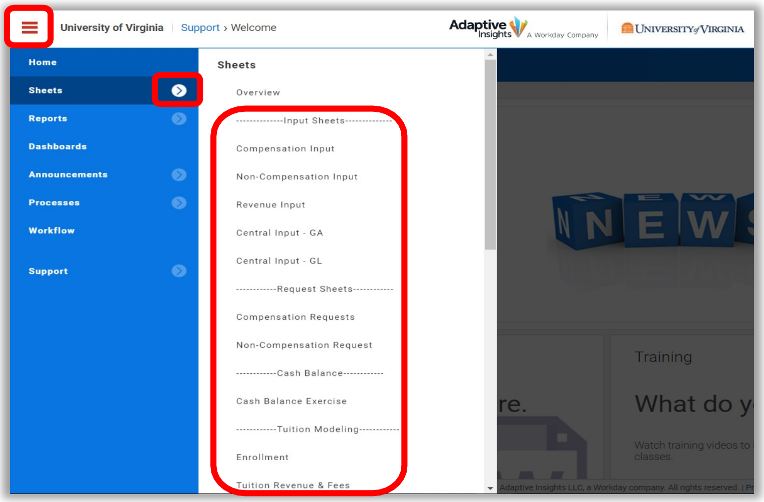
Clicking this icon will display a menu of different options - you will be working mostly with Sheets and Reports. Menu items with a right-facing arrow have more choices for you to select. Click on the arrow to view options.

</td></tr>
</table>

Sheets

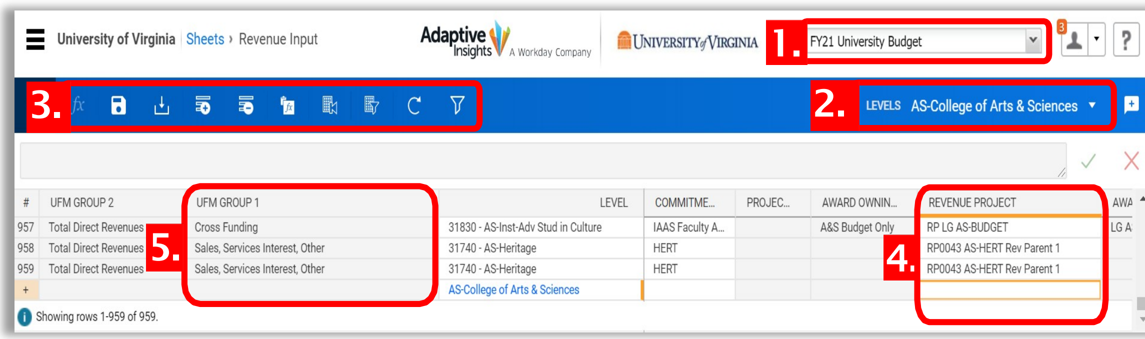
3.

Sheets are the interface where users will view, enter, and update plan data.

To access sheets, select the hamburger icon and then the right-facing arrow next to sheets, and then select the desired sheet:



Note: Right click when selecting a sheet and select "open in a new tab" to display two sheets in Adaptive simultaneously.



NOTES:

1. Before entering data, ensure that the current version is correct.
2. Users' profiles are set up with certain access permissions which are driven by the level the user is associated with.
3. The taskbar is used to begin entering, removing, and filtering data.
4. Columns with white backgrounds provide the space for users to enter data with specifc data entry requirements – freeform or dropdown selections
5. Columns with grey backgrounds are auto-populated based on the associated data entered on a row – these are not editable by the user.

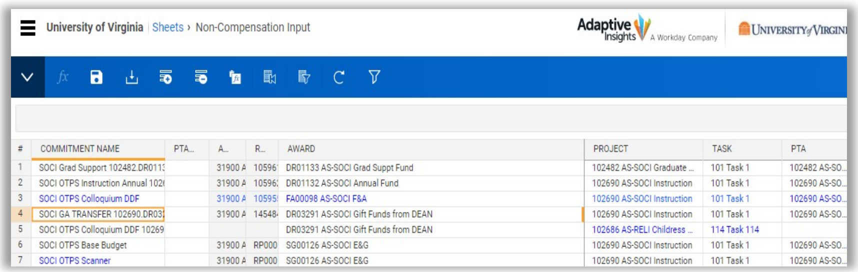
4.

Sheets Taskbar Overview

1. **Save:** saves entries and formatting adjustments to a specific sheet. Un-saved sheets will always populate an error message before closing that allows a user to save their work.

   Note: *If the save button appears greyed out (see above), this means that your input sheet does not have any unsaved changes.*

   Note: *Any changes made to an input sheet in Adaptive Insights will always appear in* ***BLUE*** *(as shown below) until they are saved:*



2. **Excel/Print:** allows users to download to Excel and print from there.
3. **Add row:** add a blank row to a modeled sheet. New rows always populate at the bottom of the sheet.
4. **Reset to default view:** removes all filters (in both the “display options” and the “filter bar”) and resets sheet to original view.

   Note: *reset to default view will also reset any unsaved changes, so be sure to remember to save!*

5. **Display options:** provides access to column-specific filtering.
6. **Refresh:** refreshes sheet data (similar to “refresh” in Internet browser).

   Note: *refresh can function as an “undo” button if you have unsaved data (displays in blue text). However, using refresh will undo ALL of your work since your last save point.*

7. **Filter bar:** allows dynamic filtering across entire sheet.

   Note: *The filter bar is NOT column specific and uses a “contains” operator, and will return results from multiple columns.*

   Example: award LC00018 can be found in the “award” column as well as the “notes” column. Adaptive will return results from both columns when using the filter bar.

5.	**Sheets: Compensation Input Sheet** This is the planning sheet for compensation and personnel related expenses. Data to input: 1. **Level** - *Auto populates but can be overridden – user must budget at lowest level and not roll-up level (ex: AS-College of Arts & Sciences)* 2. **Commitment Name** – *optional freeform (employee name – used when WD Employee ID is a placeholder)* 3. **Award** – *dropdown selector* 4. **Project** – *dropdown selector* 5. **Task** – *dropdown selector* 6. **PTA** – *as users input "Project" "Task" or "Award", the PTA dropdown selector will filter out PTAs that don't match the prior inputs* • *Once a PTA is inputted, the greyed out columns will populate with "attributes" associated with the PTA (i.e. entity and fund source)* 7. **Expenditure Type** – *dropdown selector - once selected, the associated FTE expenditure type will populate* 8. **Compensation Type** – *dropdown selector* 9. **Fund Source** – *dropdown selector (user can view fund source associated with PTA by looking at adjacent grey column that auto populates upon inputting PTA)* 10. **Entity** – *dropdown selector (user can view entity associated with PTA by looking at adjacent grey column that auto populates upon inputting PTA)* 11. **Headcount FTE** – *freeform number* 12. **Notes** – *optional freeform text to track changes / comments* 13. **Budgeted salary amount for appropriate budget fiscal year** – *freeform number*

6.	**Sheets: Non-compensation Input Sheet** This is the planning sheet for all expenses outside of personnel data. Data to input: 1. **Level** - *Auto populates but can be overridden - user must budget at lowest level and not roll-up level (ex: AS-College of Arts & Sciences)* 2. **Commitment Name** – *optional freeform (text for reference)* 3. **Award** – *dropdown selector* 4. **Project** – *dropdown selector* 5. **Task** – *dropdown selector* 6. **PTA** – *as users input "Project" "Task" or "Award", the PTA dropdown selector will filter out PTAs that don't match the prior inputs* • *Once a PTA is inputted, the greyed out columns will populate with "attributes" associated with the PTA (i.e. entity and fund source)* 7. **Expenditure Type** – *dropdown selector* 8. **Fund Source** – *dropdown selector (user can view fund source associated with PTA by looking at adjacent grey column that auto populates upon inputting PTA)* 9. **Entity** – *dropdown selector (user can view entity associated with PTA by looking at adjacent grey column that auto populates upon inputting PTA)* 10. **Notes** – *optional freeform text to track changes / comments* 11. **Budgeted amount for appropriate budget fiscal year** – *freeform number*

7.

Sheets: Revenue Input Sheet

This is the sheet for all revenue data.

Data to input:

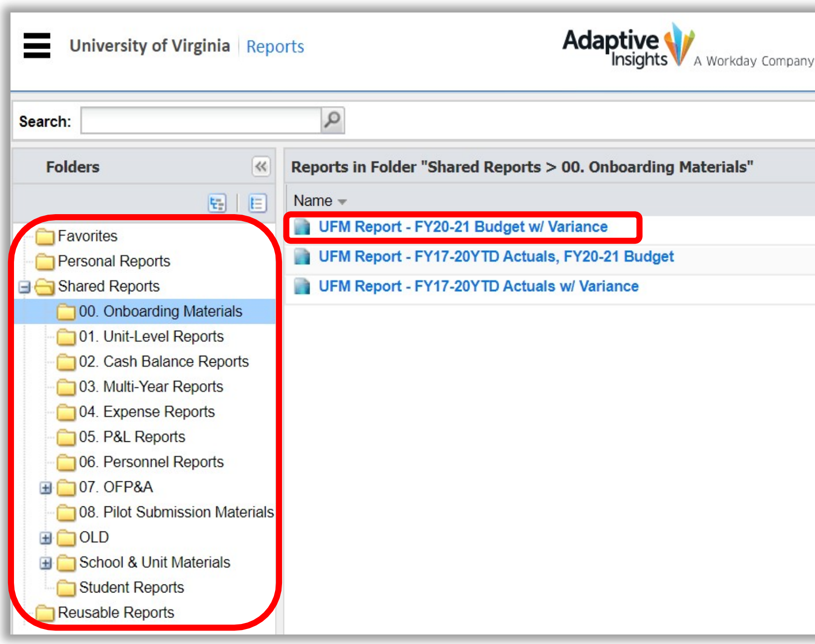
1. **Level** - *Auto populates but can be overridden - user must budget at lowest level and not roll-up level (ex: AS-College of Arts & Sciences)*
2. **Commitment Name** – *optional freeform (text for reference)*
3. **Revenue Project** – *dropdown selector (option to input a placeholder revenue project)*
4. **Award (Revenue Project)** – *dropdown selector*
5. **Entity –** *dropdown selector*
6. **Fund Source –** *dropdown selector*
7. **Object Code –** *dropdown selector*
8. **Notes –** *optional freeform text to track changes / comments*
9. **Budgeted amount for appropriate budget fiscal year –** *freeform number*

Reports

1.

To access reports, select the hamburger icon and then the right-facing arrow next to reports, and then select “Overview.”

To open a published report, you will expand the “Shared Reports” folder:



	Pre-built reports have been created to show comparative data such as: • "UFM Report – FY20-21 Budget w/ Variance" – compares FY20 vs. FY21 budget data • "UFM Report – FY17-20 YTD Actuals w/ Variance" – compares three full years of actuals with YTD FY20 actuals • "UFM Report – FY17-20 YTD Actuals, FY20-21 Budget" – compares three prior year actuals and two years of budget data • "UFM Report – FY20 YTD Actuals v FY20 Budget" – compares actuals and budget data for FY20 • "UFM Report – Budget by Fund Source Group" **To make edits to a shared report**, you will save the report to your personal folder for editing. You can access these individualized reports by expanding the "Personal" folder.