

Overview

There will be times when a user needs to update notes for a particular line on any of the input sheets (compensation, non-compensation, revenue, and requests). This Quick Reference Guide provides an overview of best practices that the Budget Office asks you to leverage when entering or updating a note.

Procedure

Naming Convention in Notes Field

1. When leaving a note (new or updated), please use the following format:

DATE – NOTE – INITIALS. (Don't forget the period!)
Ex. 8/28/19 – leave credit for Elissa Morton – ACM.

Editing Notes

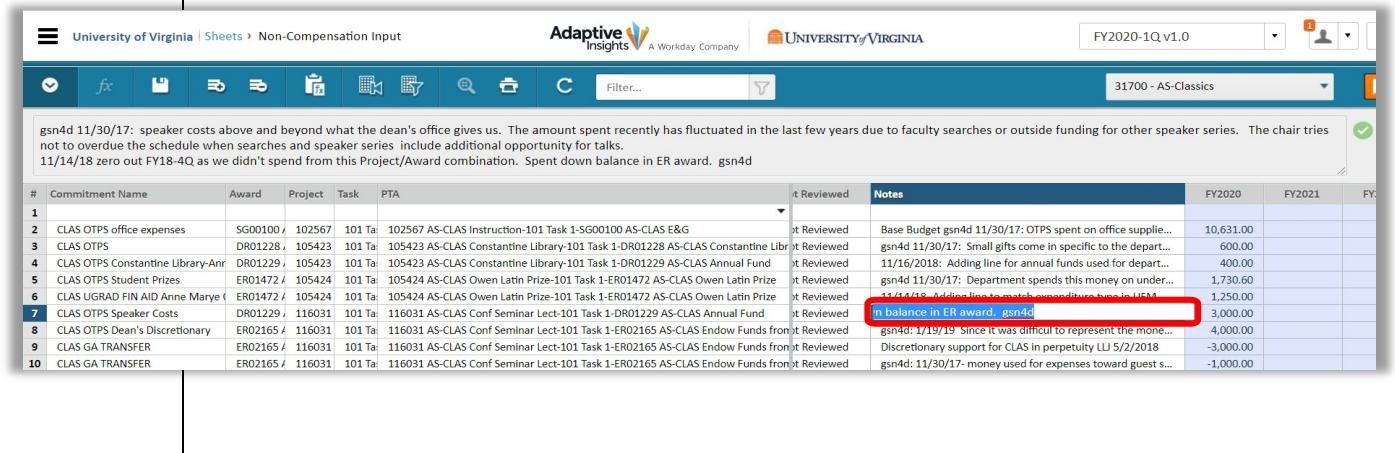
2. **Historical Notes:**

USE CAUTION when removing historical notes. When in doubt, leave the historical notes alone and add a new note at the end.

3. **Editing Notes:**

To edit a note in a cell, *click twice* – *once to select the cell and again to edit the text.*

- Once the text has been highlighted, use your right keyboard arrow to navigate to the end of the text, then begin typing.



The screenshot shows the Adaptive Insights interface for the University of Virginia. The spreadsheet displays a list of commitment items with columns for Commitment Name, Award, Project, Task, PTA, Reviewed status, Notes, and fiscal years (FY2020, FY2021, FY2022). A red box highlights the text 'in balance in ER award. gsn4d' in the Notes column for row 7.

#	Commitment Name	Award	Project	Task	PTA	Reviewed	Notes	FY2020	FY2021	FY2022
1	CLAS OTPS office expenses	SG00100	102567	101	Ta	102567 AS-CLAS Instruction-101 Task 1-SG00100 AS-CLAS E&G				
2	CLAS OTPS	DR01228	105423	101	Ta	105423 AS-CLAS Constantine Library-101 Task 1-DR01228 AS-CLAS Constantine Libr	Reviewed	Base Budget gsn4d 11/30/17: OTPS spent on office supplie...	10,631.00	
3	CLAS OTPS	DR01228	105423	101	Ta	105423 AS-CLAS Constantine Library-101 Task 1-DR01228 AS-CLAS Constantine Libr	Reviewed	gsn4d 11/30/17: Small gifts come in specific to the depart...	600.00	
4	CLAS OTPS Constantine Library-Anr	DR01229	105423	101	Ta	105423 AS-CLAS Constantine Library-101 Task 1-DR01229 AS-CLAS Annual Fund	Reviewed	11/16/2018: Adding line for annual funds used for depart...	400.00	
5	CLAS OTPS Student Prizes	ER01472	105424	101	Ta	105424 AS-CLAS Owen Latin Prize-101 Task 1-ER01472 AS-CLAS Owen Latin Prize	Reviewed	gsn4d 11/30/17: Department spends this money on under...	1,730.60	
6	CLAS UGRAD FIN AID Anne Marye	ER01472	105424	101	Ta	105424 AS-CLAS Owen Latin Prize-101 Task 1-ER01472 AS-CLAS Owen Latin Prize	Reviewed	11/14/18: Adding line to match how conditions type in UEM	1,250.00	
7	CLAS OTPS Speaker Costs	DR01229	116031	101	Ta	116031 AS-CLAS Conf Seminar Lect-101 Task 1-DR01229 AS-CLAS Annual Fund	Reviewed	in balance in ER award. gsn4d	3,000.00	
8	CLAS OTPS Dean's Discretionary	ER02165	116031	101	Ta	116031 AS-CLAS Conf Seminar Lect-101 Task 1-ER02165 AS-CLAS Endow Funds front	Reviewed	gsn4d: 1/19/19 Since it was difficult to represent the mone...	4,000.00	
9	CLAS GA TRANSFER	ER02165	116031	101	Ta	116031 AS-CLAS Conf Seminar Lect-101 Task 1-ER02165 AS-CLAS Endow Funds front	Reviewed	Discretionary support for CLAS in perpetuity LJJ 5/2/2018	-3,000.00	
10	CLAS GA TRANSFER	ER02165	116031	101	Ta	116031 AS-CLAS Conf Seminar Lect-101 Task 1-ER02165 AS-CLAS Endow Funds front	Reviewed	gsn4d: 11/30/17- money used for expenses toward guest s...	-1,000.00	

- Upon second click, the note will be visible in the grey bar underneath the blue task bar in Adaptive. If the note extends beyond the initial field of view, navigate to the bottom right-hand corner of the text box and click/drag to expand.

The screenshot shows the Adaptive Insights interface for the University of Virginia. The top navigation bar includes the University of Virginia logo, the text 'University of Virginia | Sheets > Non-Compensation Input', the Adaptive Insights logo, and the University of Virginia logo. The right side of the navigation bar shows 'FY2020-1Q v1.0' and a user profile icon. Below the navigation bar is a toolbar with various icons and a search filter. The main content area displays a table with columns for '#', 'Commitment Name', 'Award', 'Project', 'Task', 'PTA', 'Reviewed', 'Notes', 'FY2020', and 'FY2021'. A red dashed box highlights a note in the 'Notes' column for row 7, which reads: '11/14/18 zero out FY18-4Q as we didn't spend from this Project/Award combination. Spent down balance in ER award. gsn4d'. The note is expanded in a grey bar below the table. A red box highlights the bottom right corner of the note expansion area, where a small icon is visible.

#	Commitment Name	Award	Project	Task	PTA	Reviewed	Notes	FY2020	FY2021
1									
2	CLAS OTPS office expenses	SG00100 /	102567	101 Ta	102567 AS-CLAS Instruction-101 Task 1-SG00100 AS-CLAS E&G	Not Reviewed	Base Budget gsn4d 11/30/17: OTPS spent on office suppl...	10,631.00	
3	CLAS OTPS	DR01228 /	105423	101 Ta	105423 AS-CLAS Constantine Library-101 Task 1-DR01228 AS-CLAS Constantine Libr	Not Reviewed	gsn4d 11/30/17: Small gifts come in specific to the depart...	600.00	
4	CLAS OTPS Constantine Library-Anr	DR01229 /	105423	101 Ta	105423 AS-CLAS Constantine Library-101 Task 1-DR01229 AS-CLAS Annual Fund	Not Reviewed	11/16/2018: Adding line for annual funds used for depart...	400.00	
5	CLAS OTPS Student Prizes	ER01472 /	105424	101 Ta	105424 AS-CLAS Owen Latin Prize-101 Task 1-ER01472 AS-CLAS Owen Latin Prize	Not Reviewed	gsn4d 11/30/17: Department spends this money on under...	1,730.60	
6	CLAS UGRAD FIN AID Anne Marye C	ER01472 /	105424	101 Ta	105424 AS-CLAS Owen Latin Prize-101 Task 1-ER01472 AS-CLAS Owen Latin Prize	Not Reviewed	11/14/18- Adding line to match expenditure type in UFM. ...	1,250.00	
7	CLAS OTPS Speaker Costs	DR01229 /	116031	101 Ta	116031 AS-CLAS Conf Seminar Lect-101 Task 1-DR01229 AS-CLAS Annual Fund	Not Reviewed	in balance in ER award. gsn4d	3,000.00	
8	CLAS OTPS Dean's Discretionary	ER02165 /	116031	101 Ta	116031 AS-CLAS Conf Seminar Lect-101 Task 1-ER02165 AS-CLAS Endow Funds from	Not Reviewed	gsn4d: 1/19/19 Since it was difficult to represent the mone...	4,000.00	
9	CLAS GA TRANSFER	ER02165 /	116031	101 Ta	116031 AS-CLAS Conf Seminar Lect-101 Task 1-ER02165 AS-CLAS Endow Funds from	Not Reviewed	Discretionary support for CLAS in perpetuity LJ 5/2/2018	-3,000.00	
10	CLAS GA TRANSFER	ER02165 /	116031	101 Ta	116031 AS-CLAS Conf Seminar Lect-101 Task 1-ER02165 AS-CLAS Endow Funds from	Not Reviewed	gsn4d: 11/30/17- money used for expenses toward guest s...	-1,000.00	