Using Adaptive Reports to Evaluate Needs

Before entering any requests into Adaptive, please review the unit’s budget in detail to provide more context in determining increases or decreases. Use the following report to review a unit budget:

- **FY24 Budget Planning Report**
  
  ![FY24 Budget Planning Report](https://login.adaptiveinsights.com/app?r=MTI4MDIsUkFNQVBPX1NBkRCT1gyLE0%3D&service=report)

This report shows prior year & YTD **actuals**, current year budget, and next year’s budget (subject to change).

Use the **actuals** data to examine what the typical expenditures are for your unit. Use this information to anticipate what your budget needs are for the next year.

- Click on any number to view the transactions behind that amount.
A new window will appear. From there, click “Drill Into Transactions”.

This will open a tab filled with the relevant transactions in order to review detail.

<table>
<thead>
<tr>
<th>Transaction Date</th>
<th>Doc Code Key</th>
<th>Detail &amp; CL</th>
<th>Transaction Description</th>
<th>Transaction Amount</th>
<th>Debit Credit Ind</th>
<th>Fund</th>
<th>Org Code</th>
<th>Account</th>
<th>Programs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jul 1, 2022</td>
<td>J06439372</td>
<td>JE14</td>
<td>General Journal Entry (Inter-Fund)</td>
<td>14.60 USD</td>
<td>D</td>
<td>10001 General College Fund</td>
<td>73001 Budget Office</td>
<td>7014 Copy Charge</td>
<td>40 Institutional Support</td>
</tr>
<tr>
<td>Aug 5, 2022</td>
<td>F0648974</td>
<td>JE14</td>
<td>General Journal Entry (Inter-Fund)</td>
<td>13.04 USD</td>
<td>D</td>
<td>10001 General College Fund</td>
<td>73001 Budget Office</td>
<td>7014 Copy Charge</td>
<td>40 Institutional Support</td>
</tr>
<tr>
<td>Aug 21, 2022</td>
<td>F06170709</td>
<td>JE14</td>
<td>General Journal Entry (Inter-Fund)</td>
<td>12.66 USD</td>
<td>D</td>
<td>10001 General College Fund</td>
<td>73001 Budget Office</td>
<td>7014 Copy Charge</td>
<td>40 Institutional Support</td>
</tr>
<tr>
<td>Sep 28, 2022</td>
<td>F0647242</td>
<td>JE14</td>
<td>General Journal Entry (Inter-Fund)</td>
<td>12.76 USD</td>
<td>D</td>
<td>10001 General College Fund</td>
<td>73001 Budget Office</td>
<td>7014 Copy Charge</td>
<td>40 Institutional Support</td>
</tr>
<tr>
<td>Oct 25, 2022</td>
<td>F0647415</td>
<td>JE14</td>
<td>General Journal Entry (Inter-Fund)</td>
<td>12.65 USD</td>
<td>D</td>
<td>10001 General College Fund</td>
<td>73001 Budget Office</td>
<td>7014 Copy Charge</td>
<td>40 Institutional Support</td>
</tr>
<tr>
<td>Dec 3, 2022</td>
<td>F0647647</td>
<td>JE14</td>
<td>General Journal Entry (Inter-Fund)</td>
<td>13.41 USD</td>
<td>D</td>
<td>10001 General College Fund</td>
<td>73001 Budget Office</td>
<td>7014 Copy Charge</td>
<td>40 Institutional Support</td>
</tr>
<tr>
<td>Dec 21, 2022</td>
<td>F0647645</td>
<td>JE14</td>
<td>General Journal Entry (Inter-Fund)</td>
<td>13.21 USD</td>
<td>D</td>
<td>10001 General College Fund</td>
<td>73001 Budget Office</td>
<td>7014 Copy Charge</td>
<td>40 Institutional Support</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td></td>
<td><strong>91.28 USD</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
To enter requests into Adaptive, the ability to edit sheets is required. Some Adaptive seats are unable to edit sheets, so your Adaptive settings may have to be temporarily changed for the requests to be entered. If you cannot edit the sheet, please contact Chris Tredici (ctredic1@ramapo.edu) to have your access changed.

**ENTER BUDGET CHANGE REQUEST**

- Click on the Navigation Icon (3 stacked lines in top left corner). Highlight Sheets, choose “INPUT SHEET BUDGET CHANGE REQUESTS”.

If you do not see the sheet, it may be because of the version you have selected. Under Sheets, click Overview.

From there, change the version in the top right dropdown menu to Revised Budget 2023. This is the version where budget requests will be entered.
Once in the sheet, make sure you are in the version “Revised Budget 2023”.

In the top right corner, click the dropdown arrow, which will reveal a search field and menu.

Type the Organization name or code (for the unit in which you are submitting the request) in the search field, press enter, and select it from the list. Please do not enter requests for a rollup level ex – 73000 Budget Office is a rollup level, which contains 73001 and other levels. To enter a request for the Budget Office, use 73001 instead of 73000.
On the toolbar, click the Add Row icon.

- The Core column will default to your selection’s associated College Core.

- For the Requesting Fund column, select the appropriate Fund from the dropdown list. Please note “Operating” is not a specific fund and should not be selected.

**TIP:**
- You can also type in the fund code
- Press Enter and select from the list

- For the Requesting Program column, select the appropriate Program.

- For the Amt Requested column, enter the amount requested.

- For the Recurring Yes/No column, select either Yes or No.

- For the Unit’s Description of Request column, enter the description for your request with specific details.

- For the Strategic Goals column, Operational increase/decrease will be the default selection. No further detail is required at this stage in the process.
Sample of Completed Request

Click Save when finished.

Documentation

Though not required at this time, documentation regarding the details of your FY24 budget request will assist Core VPs to understand how the request supports the Core’s and the College’s goals. After submitting your request in Adaptive, please email any supporting documentation to budget@ramapo.edu. Documentation is, however, required when requesting to release the funds during the fiscal year.

Exporting Completed Requests to Excel

To keep a record of the Budget Requests from the input sheet in Adaptive, simply click the download button on the toolbar.

Should you have any questions or need additional assistance with exporting the Budget Change Requests sheet, please contact the Budget office at budget@ramapo.edu.
Releasing Budget Change Request Funds

To request the release of funds, please email budget@ramapo.edu and include the following:

- indicate that the request is a Budget Change Request
- the FOAP of which the funds should be released to
- a description of the request that matches the original request in Adaptive
- attach appropriate documentation (see below)

**Required Documentation**

All requests are required to have supporting documentation attached to the email in order for the release of funds. Appropriate documentation is a contract or quote with any changes clearly shown (a screenshot from Banner or only providing an Excel spreadsheet analysis is not acceptable).

In addition, invoices from the previous year, together with the new quote, must be provided. For example, if there has been an increase from the previous year, attach an Excel worksheet illustrating the following:

- prior year amount
- new amount
- increase between the amounts

Please email budget@ramapo.edu or with any questions regarding documentation.
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