



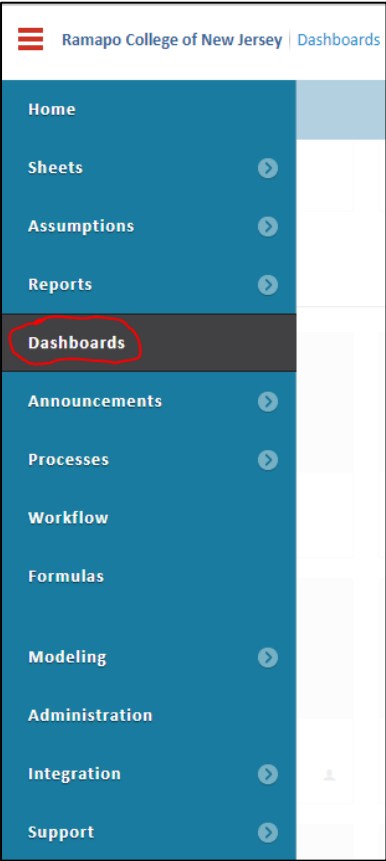
# Viewing Availability for All Accounts

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The following process demonstrates how to export from Adaptive a complete list of all non-salary budgets and their availabilities.

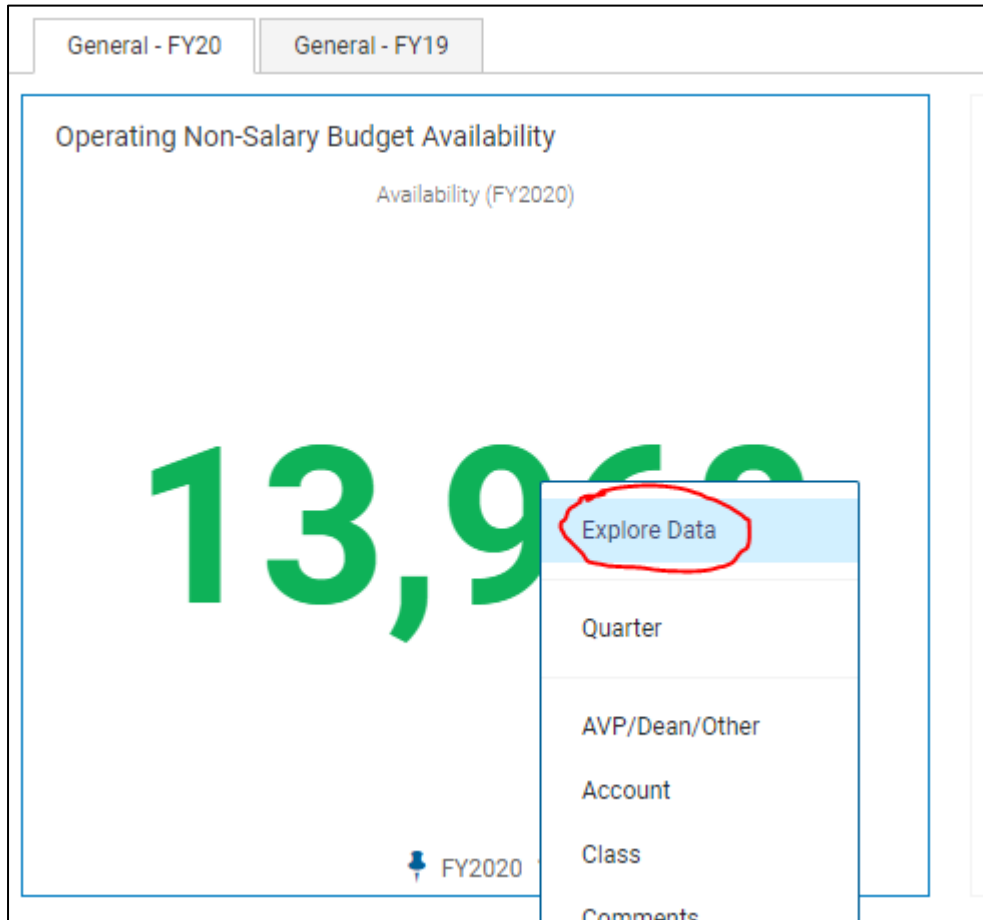
- 1. Log in to Adaptive Insights and select Dashboards from the Navigation menu.



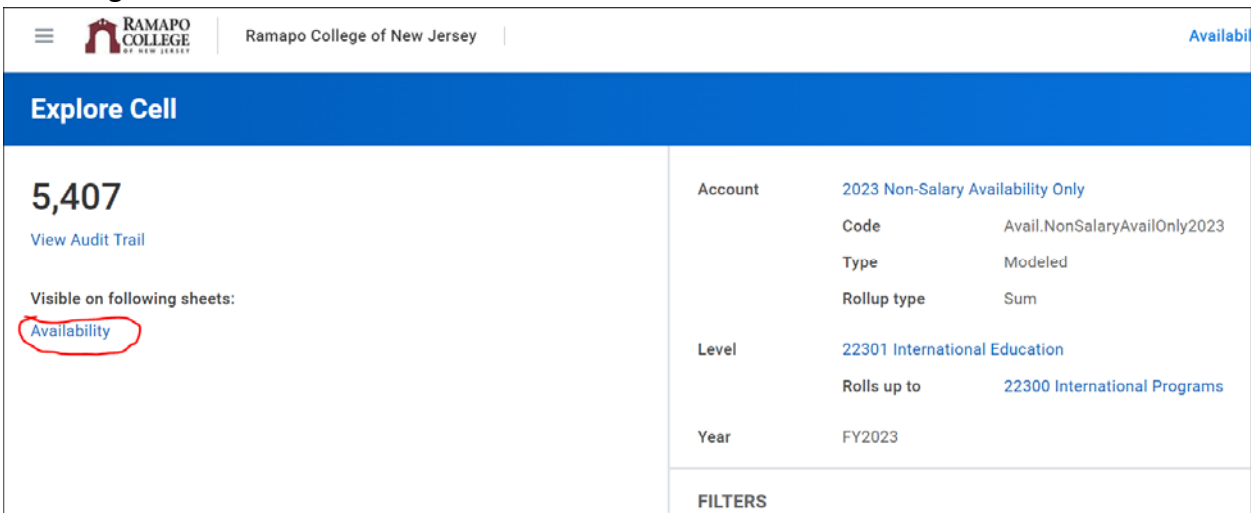
- 2. Click on the Unit-Specific Perspective or VP - Unit-Specific on the Dashboards homepage.



- The first metric shown, "Operating Non-Salary Budget Availability" is a total of all of the available balances in every non-salary account accessible by the user. Click on the number to bring up a dropdown menu. Click **Explore Data**.




- This will open a new tab called "Cell Explorer". Click on **Availability** under "Visible on the following sheets:"



- This loads a sheet of all accounts including salary accounts and prior years. The sheet must be filtered by clicking the Display Options icon on the toolbar.



**Note:** If no data is showing, click on the LEVELS dropdown at the top-right of the page and change the selection from (Only) to the top-most rollup.

- In the Display Options menu, set up the following filters by changing the dropdown selection and typing the values. Click  to add the necessary filters.

 A screenshot of the 'Display Options' dialog box. The 'Filter' tab is selected. It shows three filter groups connected by 'AND' operators. The first group has 'Fiscal Year' set to 'begins with' and the value '2020'. The second group has 'Account' set to 'begins with' and the value '7'. The third group has 'Fund Type' set to 'begins with' and the value '10'. Each filter group has plus and minus icons to the right.

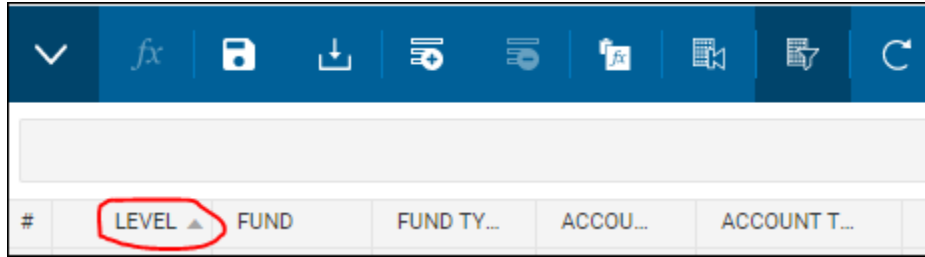
If you only have access to funds that begin with a 1, skip to step 7.

If you have access to an Auxiliary fund (fund code begins with 3):

Click **Add Group** and replicate the same filters but with Fund Type set to “30”. The menu should now look like this:

 A screenshot of the 'Display Options' dialog box showing two filter groups connected by 'OR' operators. Each group has three filters: 'Fiscal Year' set to 'begins with' and '2020', 'Account' set to 'begins with' and '7', and 'Fund Type' set to 'begins with' and '30'. There are 'Clear All' and 'Remove group' links between the groups. An 'Add Group' button is visible at the bottom left. At the bottom right, there are 'Set as default for all users' (unchecked), 'OK', and 'Cancel' buttons.

7. Click **OK**.
8. In the top row of the sheet, click **LEVEL** to sort Orgs numerically.

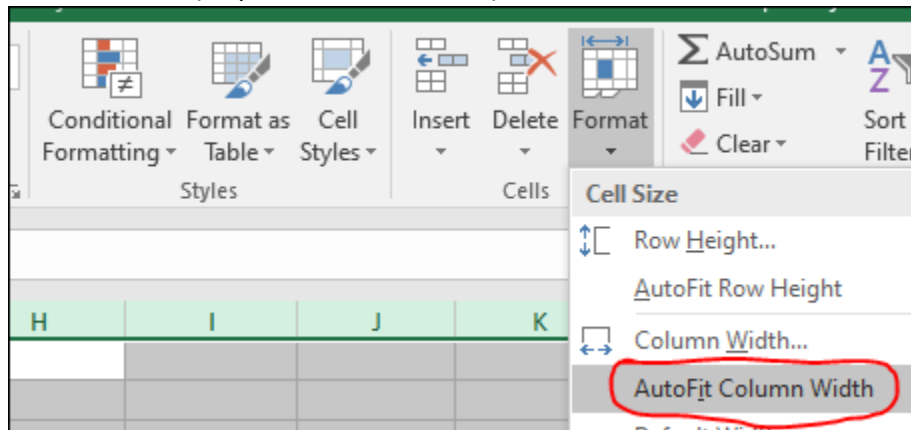


9. Now download the report to Excel by clicking the Download button.



(If your browser prompts you to cancel because your changes may not be saved if you leave, leave anyway)

10. The sheet has now been downloaded. Open the sheet in Excel (check your downloads folder if you can't find where the browser saved it).
11. Enable Editing on the Excel file.
12. Highlight columns H through L. In the Home tab, click the Format dropdown and select **AutoFit Column Width** (or press Alt – H + O + I).



13. Click on one of the column headings in Row 4. In the Home tab, click the Sort & Filter dropdown and select **Filter** (or press Ctrl + Shift + L).

The Excel spreadsheet now contains information for each non-salary operating account budget accessible to you in Adaptive. The information is current as of the end of the previous day. Transactions made on the day of the download will not be load