# Adaptive Tips & Tricks

May 31, 2023

Office of Budget & Fiscal Planning
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# Drilling to View Multiple Levels/Funds

For users associated with multiple ORGs/Levels or Funds, you may drill into an account while viewing a report and see all your ORGs/Levels/Funds expenses for that specific account on one screen. Simply left-click on the account (the example below shows account 7001), and select "Organization" or "Fund" from the pop-up menu.

# Favoriting Reports and Viewing Favorites

Instead of sifting through multiple folders in Reports, you can add a report to your Favorites folder, which appears immediately as the first folder when you go into Reports. To add a report to your Favorites folder, simply right-click on the desired report, and click Add to Favorites.
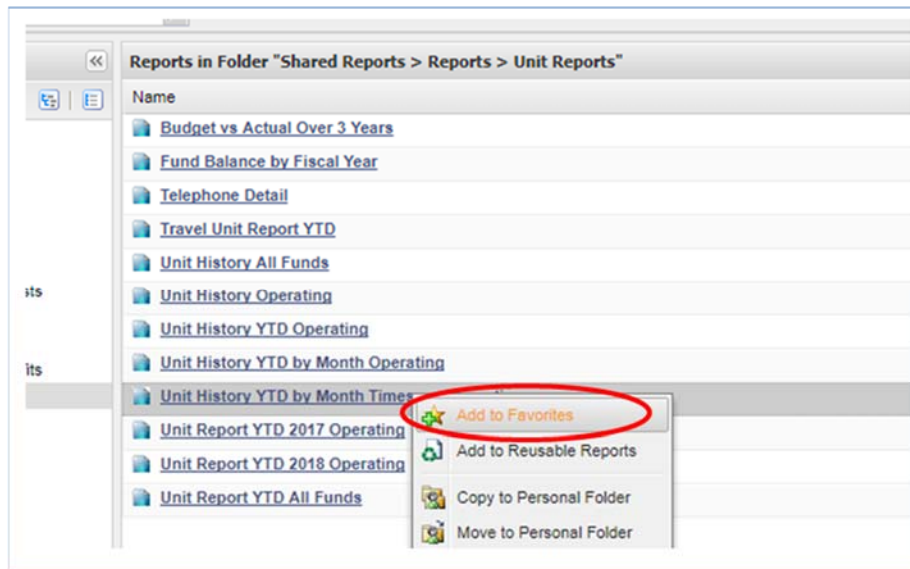


In addition, a new shortcut to access reports from your Favorites folder has been added in Adaptive. All your favorited reports can be found as soon as you log into Adaptive, without even going directly into Reports. From the Home Dashboard, click on the navigation menu (three black bars) in the top left corner. Hover your mouse over the blue arrow next to "Reports." Your Favorites report listing will appear to the right, in the black section of the navigation menu.
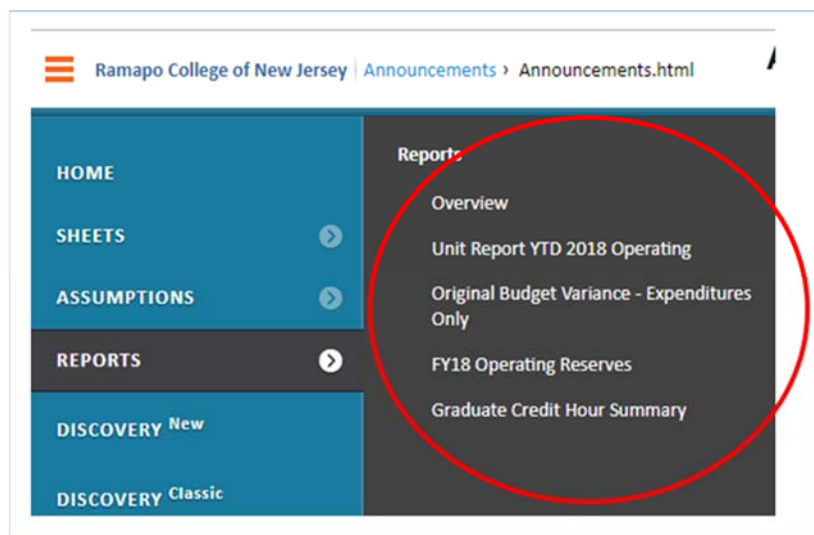
## Going Back to Default Version of a Report After Drilling

If you need to return to the original version of a report to view other data, using the browser back button (i.e. the back button via Chrome) will only cause your browser to crash, and your screen will look like this:
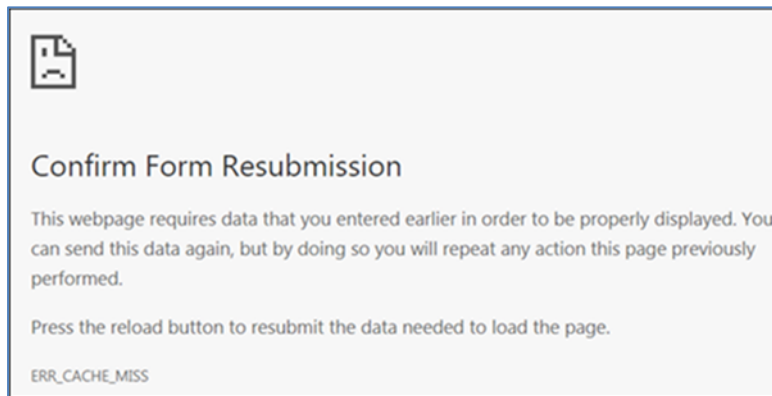


To avoid this, use the Adaptive back button within reports. It is the white arrow button found in the toolbar on the upper right-hand side of your screen.  Simply click this button to go back to the original, undrilled version of the report to avoid receiving a warning message.

## Emailing Reports

You can send a report to another Adaptive user via Adaptive directly. There are two ways of doing so.
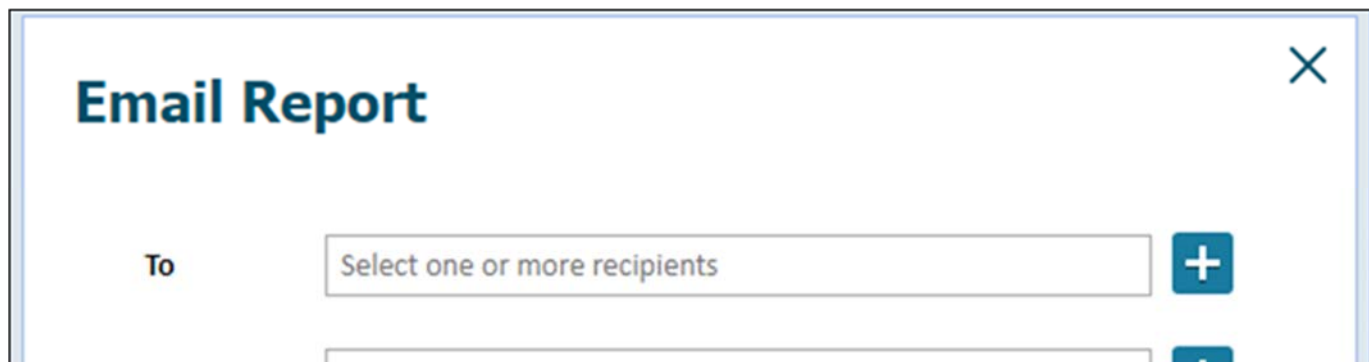
A. The first way is directly from the Reports folder. Right-click on the report link you want to send to another user. Select "Share Report." Now, proceed to step 1.
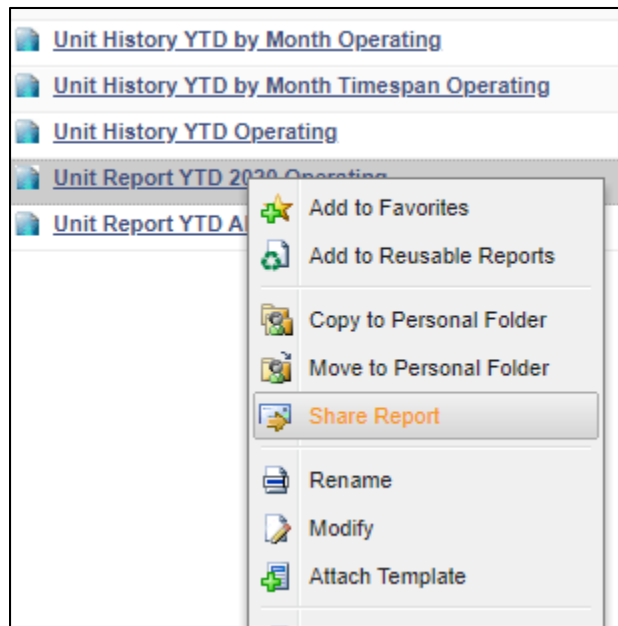


B. If you are already in the report, simply click the Share Report icon in the blue toolbar. A window will pop-up. Then, proceed to step 1.
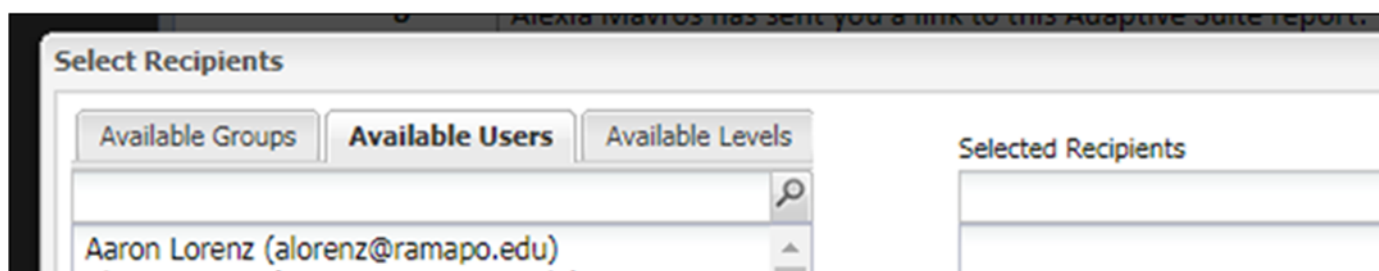


1. Next to the "To" textbox, click on the blue box with the white plus sign.

2. A menu will pop up. Click on the "Available Users" tab.
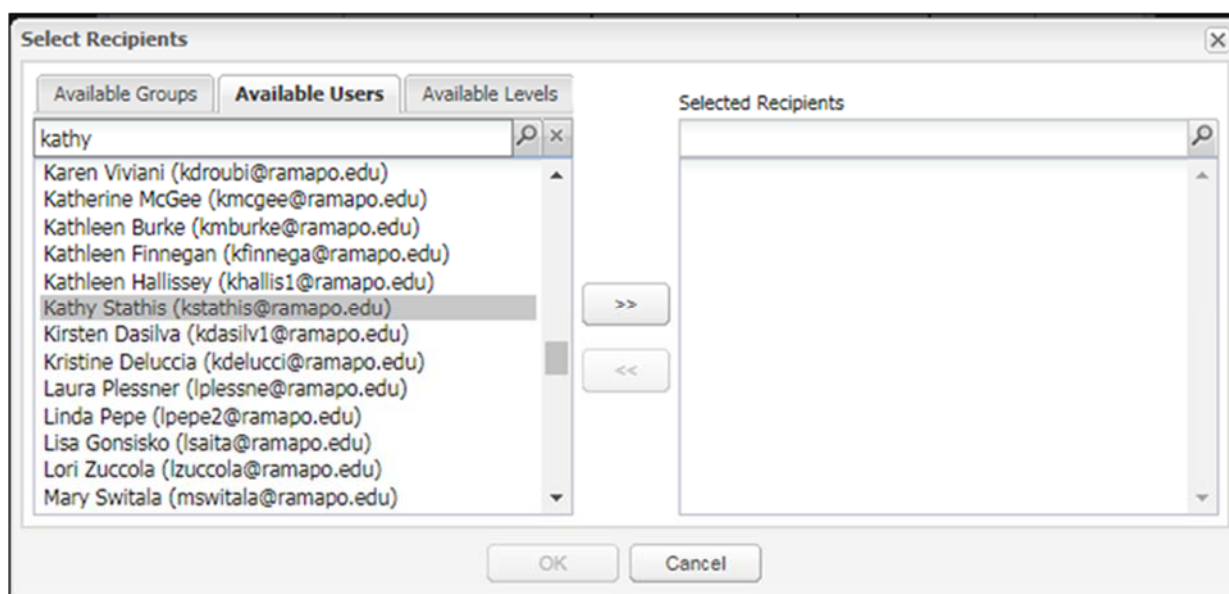


3. In the search box, type the name of the intended recipient (Make sure they have an Adaptive login. Otherwise, they will not be able to view the report). Press the Enter key on your keyboard. Then, scroll down the list of names until you find the recipient's name highlighted in grey.

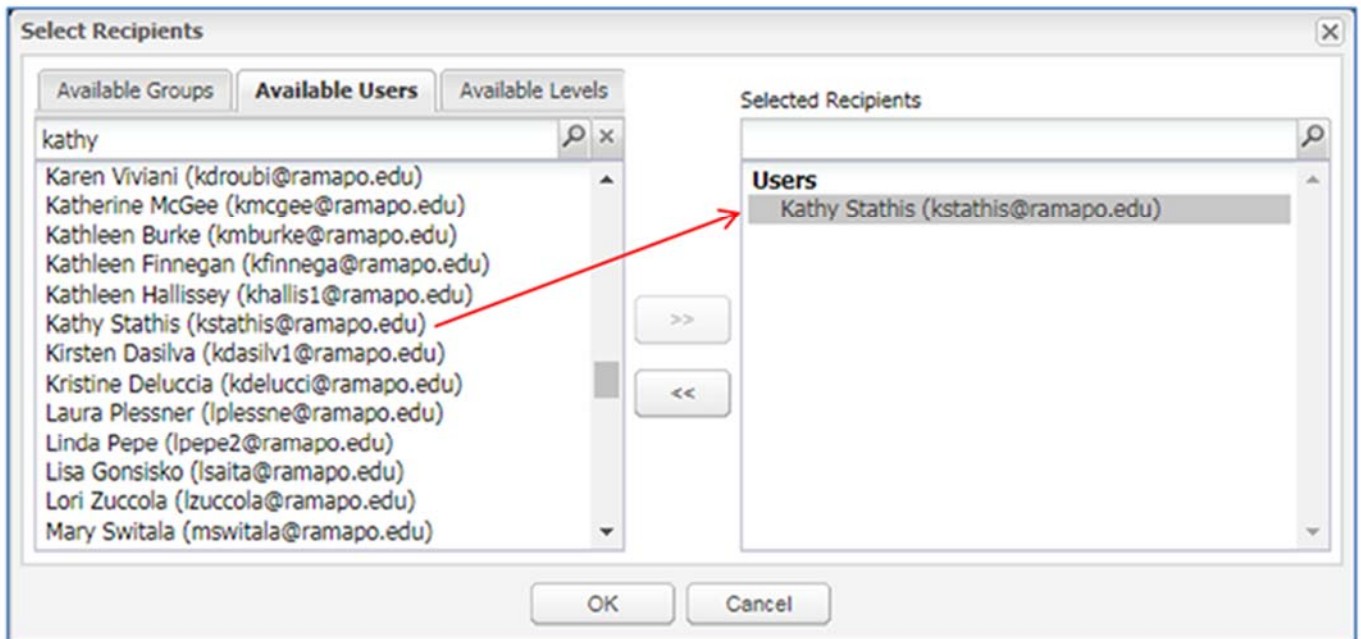4. Double-click on the name which will then move it under the "Selected Recipients" section.



5. Click OK. You may also CC a recipient using this same procedure.

6. Next, you may change the subject line to your choice. You may also edit the body of the message in the "Message" textbox. In the body of the email, we suggest that you notify the recipient that they will be asked to log in once they click the link. After they log in, they will be directed to the report.

7. After, select the checkbox to send a copy to yourself. NOTE: these emails are sent through the Adaptive server, not through your Ramapo account. Therefore, no record of this email will be saved in your email account unless you check this box to send a copy to yourself.

8. Click Send.

## Exporting Reports to Excel

Reports can be viewed as an Excel spreadsheet, making it easier to edit a report for budget planning purposes.  Exporting reports as an Excel file can also be a useful way to share a report with a recipient who does not have an Adaptive login by attaching the file to an email.

Prior to exporting a report, be sure that all the roll-ups of the accounts you wish to view are expanded so that individual, detail accounts are viewed in the report. To expand a roll-up, click on the white box with the black plus sign preceding the account name.
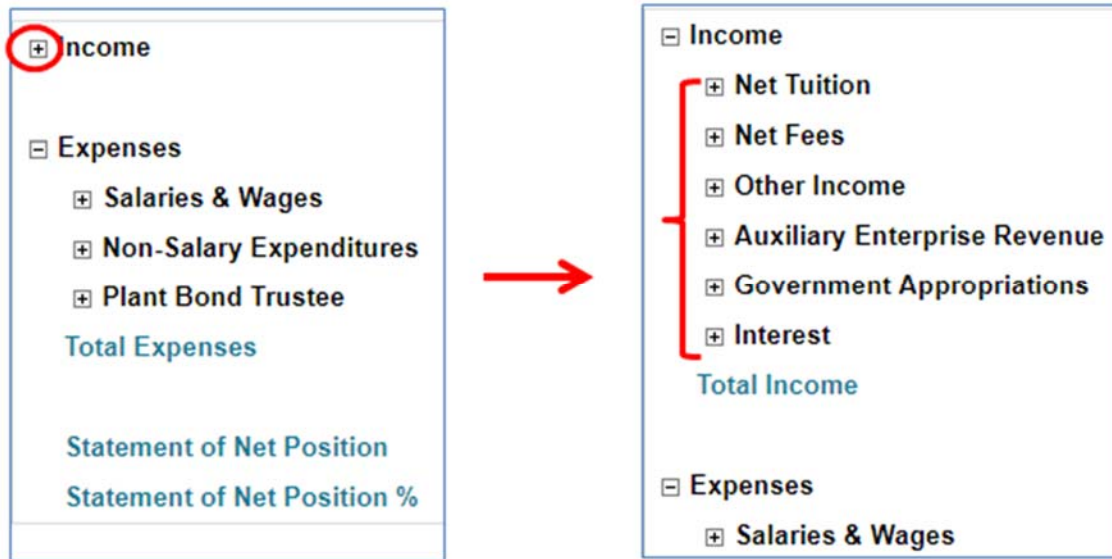
To export a report into an Excel file, simply go to the report you wish to export. In the blue toolbar, click the printer icon.
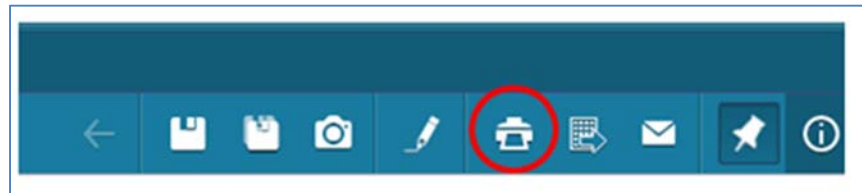


**NOTE: EVERY BROWSER EXPORTS THE FILE DIFFERENTLY.** Depending on the browser you are using, you will be asked to open/save the file. In this example, Google Chrome is used. Once the window appears, click save.
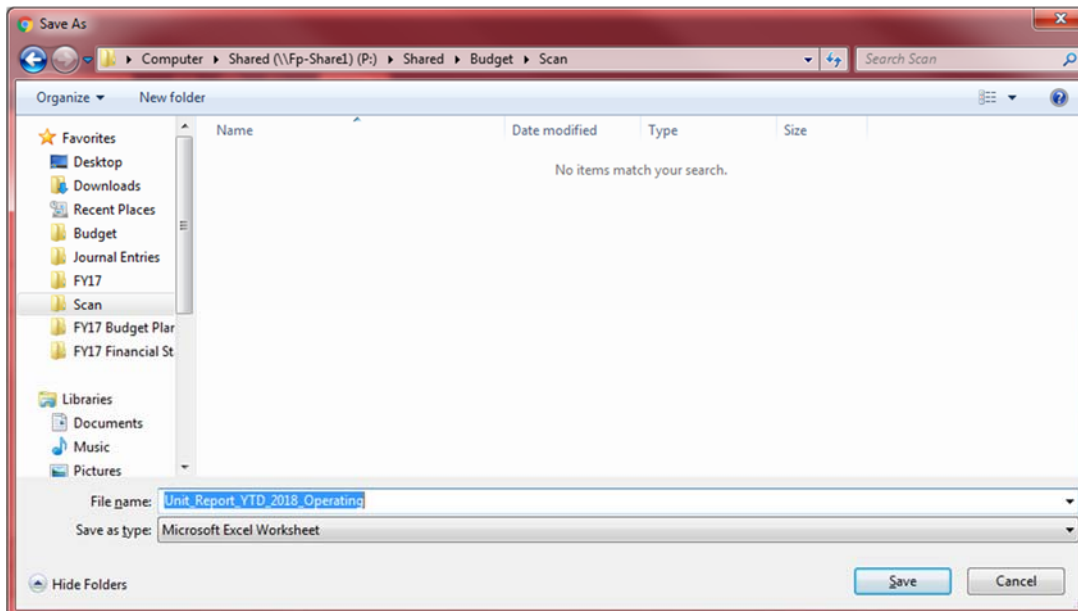
A download bar will then appear at the bottom, left side of your screen.  Click on the file to open.



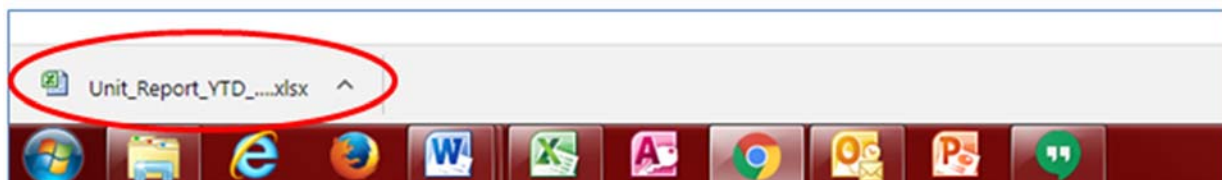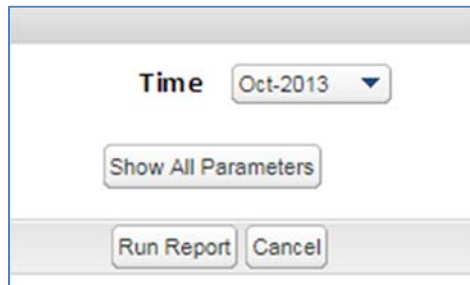The file may also automatically open in Excel, but the file may not appear on your screen. In any case, if the file does not open, be sure to check if the window is minimized in Excel by hovering over the Microsoft Excel icon in the taskbar:

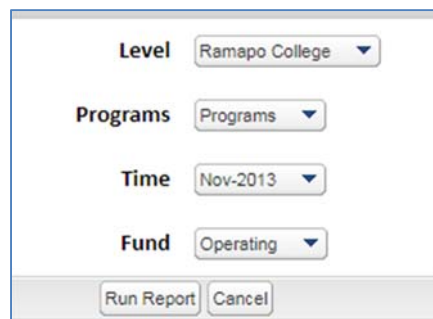# Changing the parameters of a report prior to loading - Works on some reports

When viewing reports in Adaptive, sometimes the only option is to filter by Org/Level or Program at the top of the report. Some reports allow filtering by fund by changing the parameters of the report prior to loading the report. **NOTE: This option is only available with some reports, not all. If you are able to see the screen in Step 1 after clicking on a report, then you are able to change the parameters prior to loading.**

1. When selecting a report from a folder, the first screen that follows is the one below. Click the "Show All Parameters" button.
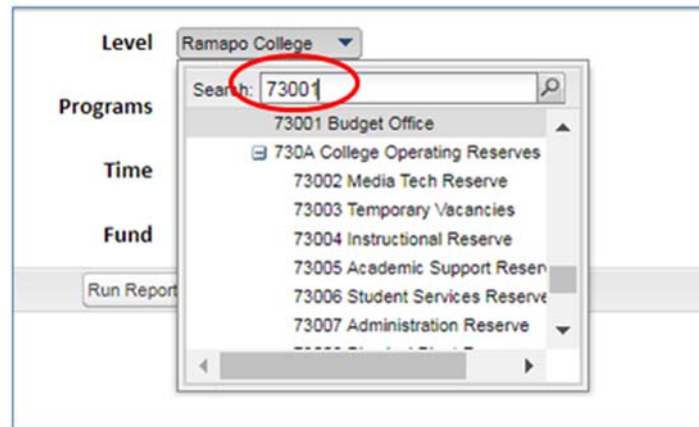


2. Next, change the Fund, Level (Org), Program, and Time. **NOTE: If the report is set to view Operating data only, you will only be able to view Operating FOAPs.**
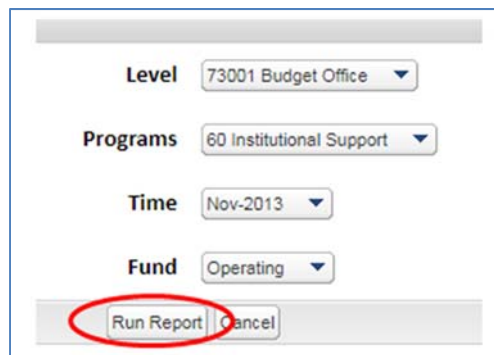
3. Simply click the appropriate drop down menus and type in the search box the parameter you are looking to filter by. The item you searched for will be highlighted in grey. Click it.



4. Once you have made the necessary changes, click "Run Report."



The report will now be filtered to view only the data selected.

# Using the Home Dashboard as a Knowledge Bank

Please be advised that the Home Dashboard contains the FY24 Budget Planning calendar as well as any important deadlines or news updates in regards to budget requests, training, contact information, and features. The Home Dashboard should be the first page you see when you log into Adaptive Insights. If it is not, please contact the Budget Office at ext. 7703.

There are also useful links to PDF files of Adaptive manuals and user information such as RCNJ fringe rates that you may use at your convenience.



To access the Home Dashboard at any time when logged into Adaptive Insights, simply click the Ramapo College logo on the top left of the screen (located to the right of the three bars), and you will be taken to your Home Dashboard.
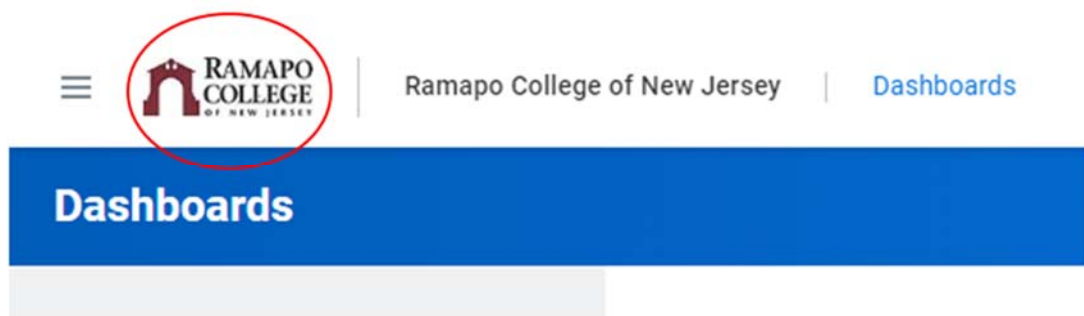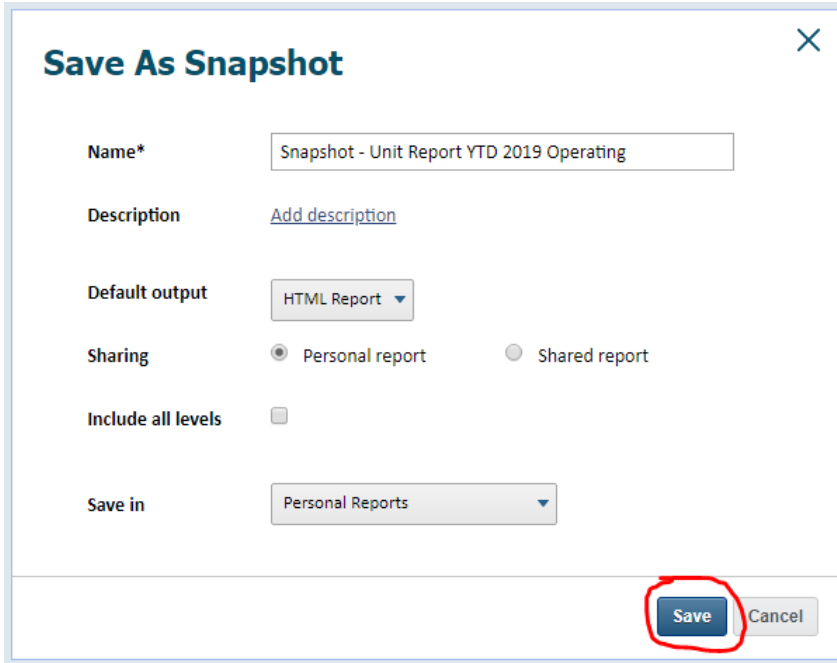
## Snapshot in Time

A report in Adaptive can be saved as a "snapshot" to show data at a particular point in time. The snapshot is not a live report, meaning it is not updated when refreshing or running and it will look the same every time it is viewed.

In order to save a report as a snapshot, open the report you wish to save and click the camera icon in the toolbar at the top.
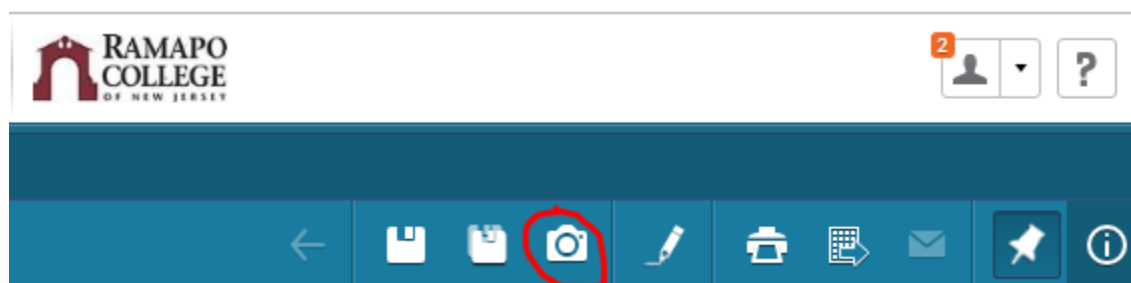


After clicking, a menu box will appear where you can change the name of the new snapshot as well as the location. Saving it as a personal report puts the snapshot in the user's Personal Reports folder where only that user can view the snapshot.

When viewing the snapshot report, all drilldown/filtering functionality is lost. If you would like to see information from a certain level, be sure to filter by that level in the original report before creating the snapshot.

## Adding a Filter to a Report

Certain reports can be filtered to show or hide certain elements in the report.

For example, when looking at a report that contains information for multiple accounts, a filter can be added to only show the accounts that you specify.

Click on the Filter Report button in the top-right corner. This will bring up a menu called "Manage Filter".



In this menu, you can add, modify, or delete filters. If the desired filter is to only show non-salary expense accounts, then the menu can be used as follows:

Click the left-most dropdown box to select which column to filter.

The "operator" box indicates how the filtering will be applied. To find all accounts that begin with a 7, the following information would be added.



Multiple filters can be applied at the same. To do so, click the plus sign ⊕ next to the current filter and fill in the new set of fields.

## Drilldown to Explore Cell

In Adaptive reports, you can get closer look at data by "exploring a cell". You will be able to see more detail including a time breakout and FOAP summary.

To explore a cell, simply click on the data in the report.



This will open up a new window in your browser called "Cell Explorer" in which you can see the more detailed information.



If you have any questions about how to get to the cell explorer or if you have any other concerns, please contact the Budget Office via email at budget@ramapo.edu or by calling ext. 7703.

# Sorting in Transaction Reports

When viewing transaction and model reports in Adaptive, the sorting can be changed by clicking the column header at the top of the data. Clicking once will sort in ascending order (A-Z). Each additional click will toggle between descending and ascending.

| Transaction Date ▲ | Doc Code Key | Detail RUCL Code | Transaction Description | Transaction Amount | Debt Credit Ind | Fund |
|---|---|---|---|---|---|---|

For example, the Transaction Date column can be sorted to change the order from old-new to new-old depending on the desired information.

If you have questions on sorting or if you have any other concerns, please contact the Budget Office via email at budget@ramapo.edu or by calling ext. 7703.

## Managing the Favorites Folder in Adaptive

In the Reports page, every user has a personalized folder called "Favorites" that contains every report that the user has chosen to "Add to Favorites." To add a report to the Favorites folder, right-click the report and click "Add to Favorites."

(These favorite reports also appear in the navigation menu when "Reports" is hovered over with the mouse)

Favorite reports are initially displayed in the order that they were added. To change this order, open the Favorites folder and click and drag the reports to their desired order

To **remove** a report from your Favorites folder, right-click the report and click "Delete from Favorites"
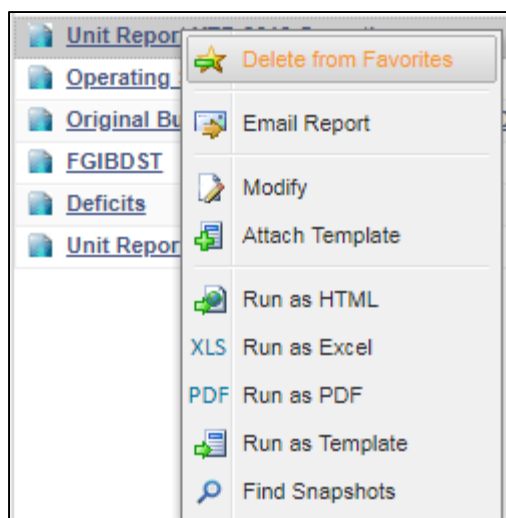
Note: This does not delete the report itself. It can still be found in its original location.

## Viewing Budget Requests in Adaptive

The Budget Requests folder contains information on submissions related to the budget.

Go to Reports in Adaptive. Expand Shared Reports and expand the folder called "Budget Requests". Then, click on the "FY19 Budget Requests" folder to view:

A. Capital Requests approved amount, distributions, and availability
B. Budget Change Requests approved amount, distributions, and availability
C. SPIF Requests approved amount, distributions, and availability
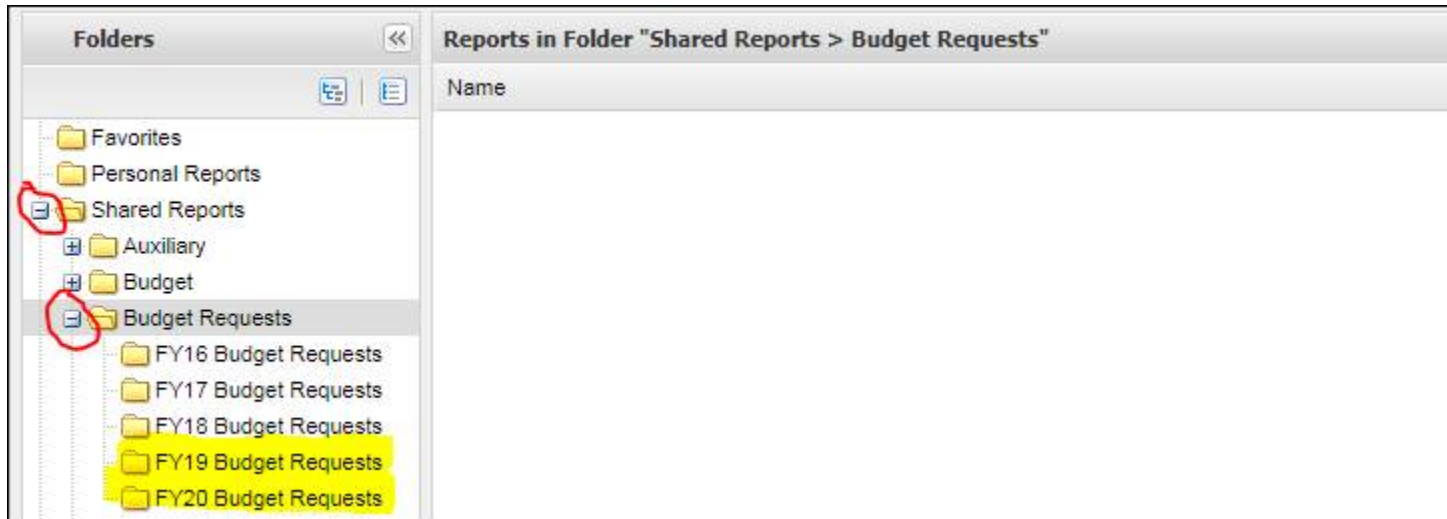
## Capital Requests report
- Displays the disposition of any capital improvement request
- Requests are maintained by the Office of Institutional Effectiveness & Planning


## Budget Change Requests report
- Details the budget increases/decreases requested and the disposition of each request
  - Increases may include increase in software contracts, or any contract/subscription/annual cost
  - Decreases may include a cancellation of a yearly subscription
- Requests are maintained by the Office of Budget & Fiscal Planning
- Requests listed as "recurring" will be built into base for future years
  - Be sure to keep track of what gets built into your Unit's base budgets


## SPIF Requests report
- Strategic Priorities Incentive Fund
- Displays the disposition of any SPIF request
- Requests are maintained by the Office of Institutional Effectiveness & Planning
- Requests are never recurring


# Adjustments to Original Budget

Any changes made to a unit's base expense budgets are explained in an Adaptive report called "Adjustments to Original Budget". This report will detail the amount adjusted and the reason for the adjustment. Click here to view the changes that went into FY20's Original Budget.

To find this report and add it to your Favorite Reports, navigate to the reports menu in Adaptive, expand all shared reports to see a folder called Budget Requests. Click on the folder for the appropriate fiscal year (FY20 Budget Requests) and find the report inside. Then right-click on the report title and select "Add to Favorites".
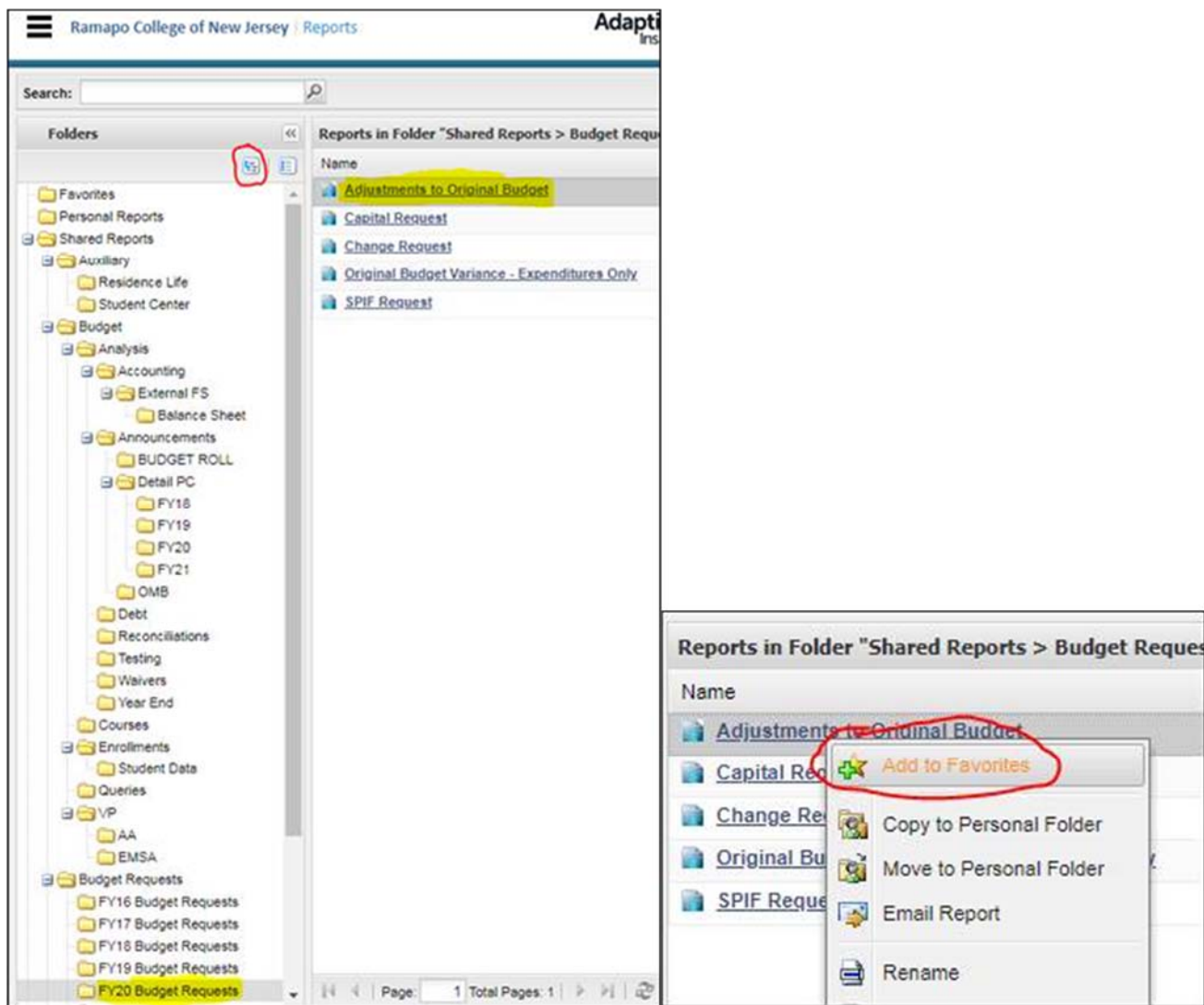


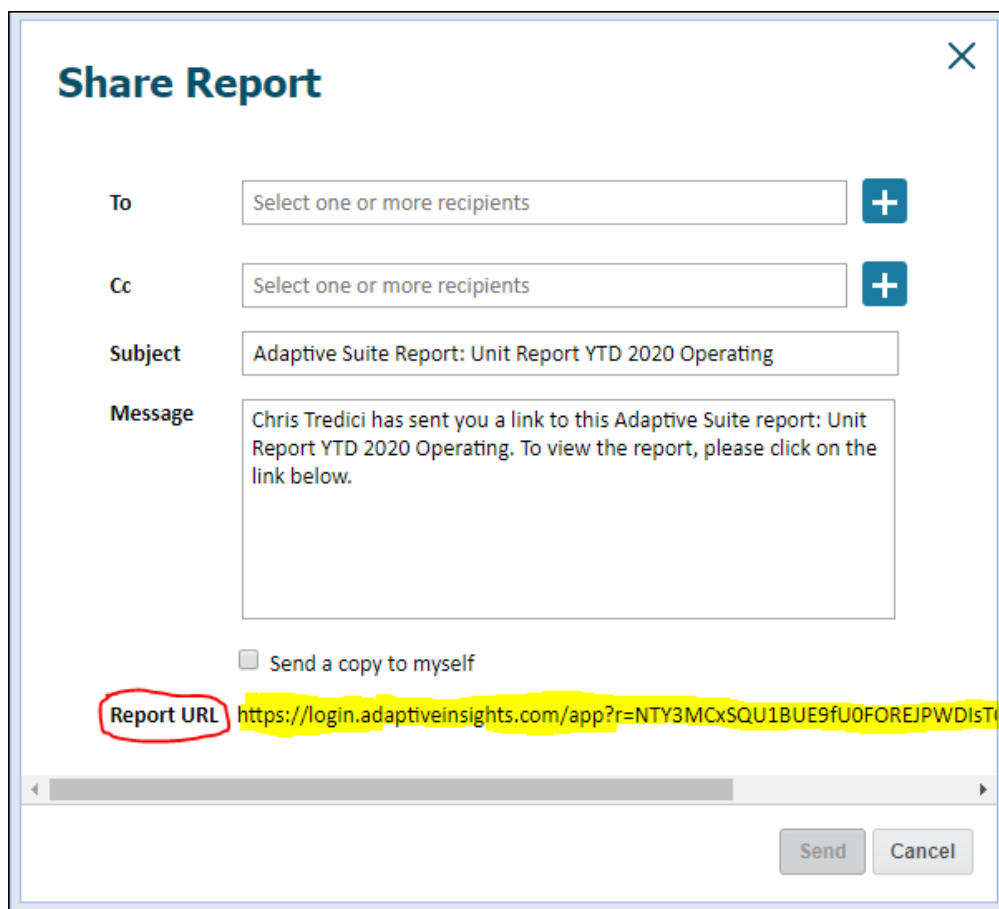## Adding a Report to Browser Bookmarks

Each web browser allows the user to save web pages as bookmarks (sometimes called Favorites) for quick access. An active page can be saved as a bookmark by pressing Ctrl + D.

**NOTE:** This only works if the URL in the address bar is specific to the active page. Some Adaptive reports have the URL https://livec08a06.adaptiveplanning.com/app when displaying the report. Bookmarking this link will not bookmark the report. To bookmark in this case, follow these steps:

Once an Adaptive report has been opened, the link to the report can be generated by clicking the *Share Report* button on the toolbar.



The report-specific URL appears at the bottom of a pop-up menu.
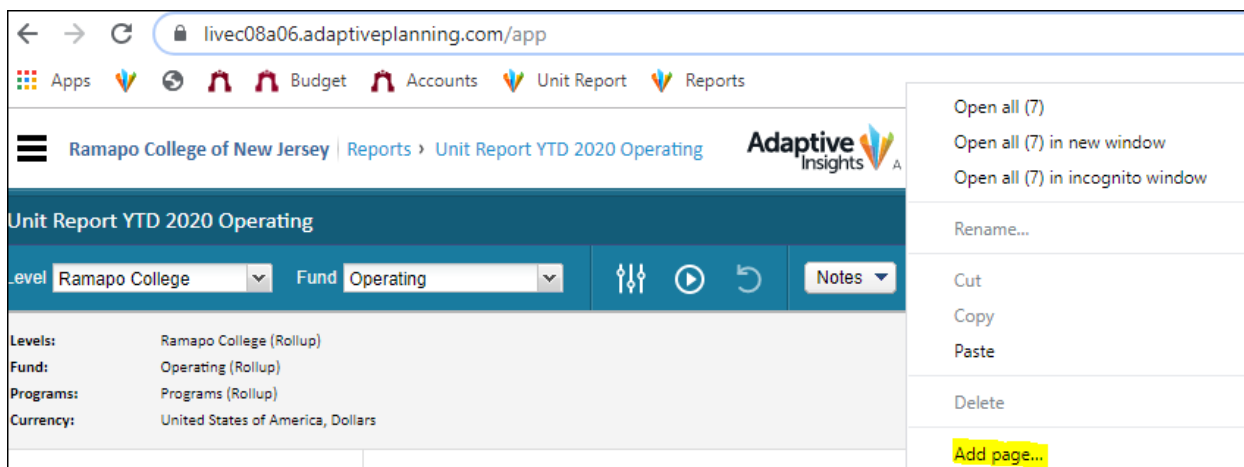


Click the URL starting with "https" and drag all the way until you reach the end of the link. The menu will scroll over. Make sure you have only highlighted text that is part of the link.

Copy the link (Ctrl + C).

**For Google Chrome**

Right-click the bookmarks bar below the address bar. Select *Add Page* from the list.



(If there is no bookmark bar, it may be hidden. Press Ctrl + Shift + B to unhide.)

A menu will appear. Enter the display name for the bookmark (example: Adaptive Unit Report) in the **Name** box. Paste (Ctrl + V) the report URL in the **URL** box. Click **Save.**

**For Mozilla Firefox**

Right-click the bookmarks bar below the address bar. Select *New Bookmark…* from the list.

A menu will appear. Enter the display name for the bookmark (example: Adaptive Unit Report) in the **Name** box. Paste (Ctrl + V) the report URL in the **Location** box. Click **Add.**

**For Microsoft Edge**

Go to any webpage (example: ramapo.edu) and press Ctrl + D to add to Favorites. Enter the name as whatever you want the report shortcut name to be.

Press Ctrl + D on that same webpage. Change the URL to the report URL.