



# Annual Budget Change Request Process

January 2025

Office of Budget & Fiscal Planning

[www.ramapo.edu/budget](http://www.ramapo.edu/budget)

[budget@ramapo.edu](mailto:budget@ramapo.edu)

# Using Adaptive Dashboard to Evaluate Needs

Before entering any requests into Adaptive, please review the unit's budget in detail to acquire more context when determining increases or decreases.

## Home Dashboard

<https://idp.ramapo.edu/idp/profile/SAML2/Unsolicited/SSO?providerId=https://login.adaptiveinsights.com:443/samlso/UkFNQVBPX1NBTkRCT1gy>

Upon logging in, there's a new tab for this process called **BUDGET CHANGES**. This is where all FY26 Budget Changes will be entered into Adaptive.

At the top of this page, select the Org you'd like to view by clicking the "Level" dropdown. In the top-right, select Revised Budget 2025.

**Budget Status Detail (FGIBDST)**  
Use this report to view all activity taken place in the current fiscal year. Click on any value to view the associated transactions for that amount.

**FY25 Budget Planning Report**  
This report shows prior-year history, the current year, and next year's tentative plan. Click on any values in the Actuals columns to view the associated transactions for that amount.

**Account Availability (FGIBAVL)**  
Remaining balances for the current fiscal year. Each account's availability from now to June 30th.

To view transactions in reports:

- Click any value you'd like to see the transactions for
- A new window appears
- Click **Drill Into Transactions** (top-left)
- The transactions report will run
- You can export to Excel -> Find the export button on the toolbar

To view transactions in this dashboard (see other tabs):

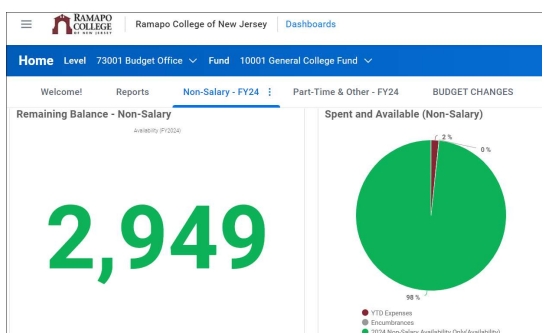
- Click any value/chart segment you'd like to see the transactions for
- Drill-down options appear -> Select **Explore Data**
- A new window appears
- Click **Drill Into Transactions** (top-left)
- The transactions report will run
- You can export to Excel -> Find the export button on the toolbar

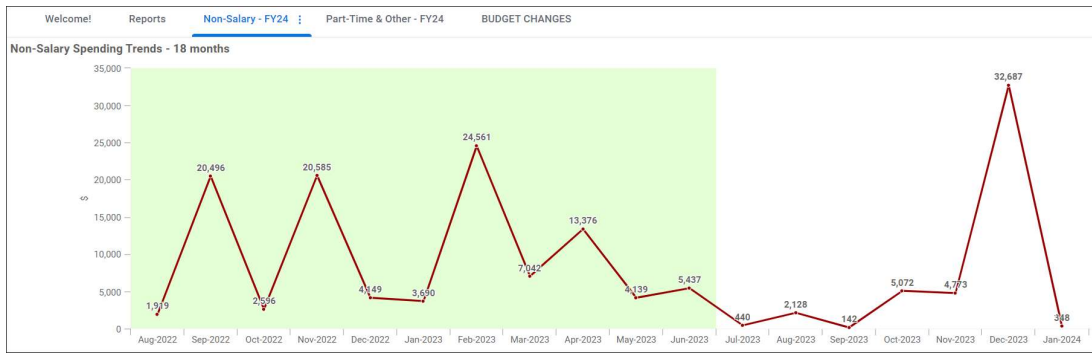
Scroll further down to input any budget changes

Requests must be approved by Core VP before entering here in Adaptive

The top section of this tab has links to reports (in blue) for detailed analysis of any budget accessible by the user. Read the tips on the right of the screen for instructions on how to produce a list of transactions, should the need arise.

The existing tabs of the Home Dashboard are available for analysis as well. For example, click the **Non-Salary - FY25** tab for at-a-glance views of budget data





## Entering a Budget Change Request for the Next Fiscal Year

To enter changes into Adaptive, the ability to edit sheets is required. Some Adaptive users 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 ([ctredici@ramapo.edu](mailto:ctredici@ramapo.edu)) to have your access changed.

### Entering FY26 Budget Changes

On the **BUDGET CHANGES** tab of the Home dashboard, scroll to the bottom section. **Make sure your version in the top-right of the screen is set to Revised Budget 2025.**

Ramapo College of New Jersey Dashboards

Home Custom Level: Ramapo College Fund: All

Welcome! Reports Non-Salary - FY25 Part-Time & Other - FY25 **BUDGET CHANGES**

Enter your FY26 Budget Change Requests in the table below

- Click the Add Row button (+)
- 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.
- 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.
- Click Save when finished.

Enter Requests Here - click Add Row

#	CORE	REQUESTING FUND	REQUESTING ORGN/LE...	REQUESTING PROGRAM	AMT REQUESTED	RECURRING YES/NO	UNIT'S DESCRIPTION OF
1	Total				0		

Showing rows 0 of 0.

Follow the instructions and scroll down to find the input sheet:

- For the Strategic Goals column, Operational increase/decrease will be the default selection. No further detail is required at this stage in the process.
- Click Save when finished.

Enter Requests Here - click Add Row

#	CORE	REQUESTING FUND	REQUESTING PROGRAM	AMT REQUESTED	RECURRING YES/NO	UNIT'S DESCRIPTION OF REQUEST	ST
1	Total			0			

Showing rows 0 of 0.

## Sample of Completed Request

Levels 73001 Budget Office						
CORE	REQUESTING FUND	REQUESTING PROGRAM	AMT REQUESTED	RECURRING YES/...	UNIT'S DESCRIPTION OF REQUEST	STRATEGIC GOALS
Fiscal Health Core (FHC)	10001 General College...	60 Institutional Support	1,000	No	Hypothetical Conference Phoenix 2023	Operational increas...
			1,000			

## Documentation

Though not required at this time, documentation regarding the details of your FY26 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](mailto: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 Changes from the input sheet in Adaptive, click the three dots to access the sheet menu, then select **Download**.

Enter Requests Here - click Add Row						
#	CORE	REQUESTING FUND	REQUESTING PROG...	AMT REQUESTED	RECURRING YES/NO	UNIT'S DESCRIPTIO...
1	Total			0		
Showing rows 0 of 0.						

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](mailto:budget@ramapo.edu).

# Releasing Budget Change Request Funds

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Requests for the release of Approved FY26 Budget Change funds must be made by **June 2<sup>nd</sup>, 2025**.

**Approved Budget Change funds will not be released until existing funds in the unit's pool are exhausted.**

To request the release of funds, please email [budget@ramapo.edu](mailto:budget@ramapo.edu) and include the following:

- "Budget Change Request" & "Unit name" in the subject line
- FOAP where funds should be released to
- description that matches the original request in Adaptive
- appropriate documentation (see below)

## Required Documentation

All requests to release funds are required to have supporting documentation attached to the email. Appropriate documentation is an invoice, 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](mailto:budget@ramapo.edu) or with any questions regarding documentation.

## Budget Office Contact Information

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**Kathy Stathis**

Interim Director

Phone: (201) 684 -7763

Office: D211

E-mail: [kstathis@ramapo.edu](mailto:kstathis@ramapo.edu)

**Merita Larti**

Interim Associate Director

Office: D211

Phone: (201) 684 -7840

E-mail: [mlarti@ramapo.edu](mailto:mlarti@ramapo.edu)

**Chris Tredici**

Financial Systems Analyst

Office: D211

Phone: (201) 684 -7867

E-mail: [ctredici@ramapo.edu](mailto:ctredici@ramapo.edu)