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Contacts

All questions and inquiries about Adaptive Insights and the budget process should be directed to our Budget Office.

Email: budget@wfu.edu

Phone:
Shannon Badgett (336)758-3159
Buffi Vestal (336)758-7231
Matt Grau (336)758-7607
Wendy Harper (336)758-1954
Logging In and User Roles

Login URL - https://login.adaptiveinsights.com

Forgotten Passwords (not necessary when using Single Sign-On)
Forgotten passwords may be reset by clicking the Forgot your password? link in the logon box. You will receive an email with reset instructions from Adaptive Insights.

Change Your Password (not necessary when using Single Sign-On)
To change your password:

1. Click the User dropdown arrow beside your avatar.
2. Click Settings to open the My Profile page.
3. Complete the fields in the Password box.

4. Save.
User Security

Levels are the organizational structures of Wake Forest University. Levels are Cost Centers.

Level Rollups represent Cost Center hierarchy.

Each level contains the following user roles:

- **Level Budget Specialist**
  The Level Budget Specialist has access to edit and submit levels which they are assigned. Once the Budget Specialist submits the level it is no longer editable by them, unless they recall the level. Levels can only be recalled by the Budget Specialist if they have not been approved by the Level Budget Manager.

- **Level Budget Manager**
  The Level Budget Manager has access to edit, submit, or approve and lock any level or level roll-up which they are assigned. A Level Budget Manager can reject a level to make the data sheet editable again to themselves or the Budget Specialist. Level Budget Managers have access to Workflow (ability to see the Level status).
Navigating the Workspace

The **Navigation Menu** icon ⌉ sits in the upper left corner of your workspace. Click the icon to reveal your **Navigation Pane**. Click on a category in the Navigation Pane to access that category’s menu items.

![Navigation Pane Example](image)

*Example Navigation Pane – some categories may not be applicable to our use of the system.*

**Navigation Categories:**

- **Sheets** - interfaces to view, enter, and update data (such as actual ledger data, budgets, forecasts and personnel information).
- **Reports** - used for data analytics and balancing to guideline
- **Announcements** - used by system administrators to display WFU announcements
- **Workflow** - (available to Level Budget Managers) view level statuses and submit or approve
- **Support** - access to the Adaptive Insights home page and Adaptive News; *Please contact the WFU Budget and Financial Planning office for all technical and budget support.*

To return to the homepage, click **Home** in the Navigation Pane or click the **Adaptive Insights logo** at the top of your workspace.
Sheets Tools and Features

Sheets Overview
Clicking the Sheets category or Overview from the Sheets category in the Navigation Pane opens the My Sheets page. All sheets available to you are listed here. Sheets are displayed based on your last active Level.

A Version is a collection of accounts, levels, and other data that represents a particular financial scenario such as current year Guideline Budget or Working Budget.

Helpful Tips on Versions:
The Guideline Budget is your FY19 budget, adjusted for merit and approved incremental changes. The Working Budget consists of your FY19 budget adjusted for predetermined amounts, including forecasted net tuition, internal charges, cost allocation and occupied positions. Initially, the Working Budget may not balance to your Guideline Budget when you get started. You should not submit your Working Budget until you are in balance with your Guideline Budget.
**Sheets Display**

The sheets we use include the following toolbar features (some of which are not applicable to our use of the system).

Below are some of the tools we will use:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Formula Bar Button</strong></td>
<td>Expand and collapse the Formula Bar, toggling between the two display modes</td>
</tr>
<tr>
<td><strong>Formula Assistant</strong></td>
<td>Opens the Formula Assistant dialogue box</td>
</tr>
<tr>
<td><strong>Save</strong></td>
<td>Saves all changes made to the active sheet</td>
</tr>
<tr>
<td><strong>Default View</strong></td>
<td>Resets the current view to the default</td>
</tr>
<tr>
<td><strong>Display Options</strong></td>
<td>Presents available options for displaying the current sheet, i.e. Time Range, Month, Quarter, Year and others</td>
</tr>
<tr>
<td><strong>Cell Explorer</strong></td>
<td>Drills into the contents of a cell for reviewing source data</td>
</tr>
<tr>
<td><strong>Printable View</strong></td>
<td>Creates and Excel spreadsheet of the current sheet</td>
</tr>
<tr>
<td><strong>Refresh Button</strong></td>
<td>Refreshes the current sheet, reflecting all changes saved by you and other users</td>
</tr>
<tr>
<td><strong>Search</strong></td>
<td>Searches all accounts, dimensions and display values for your entered term</td>
</tr>
<tr>
<td><strong>Sheet Notes</strong></td>
<td><em>(Not pictured above)</em> Opens the Notes dialogue box for viewing and adding notes to the active Level and Version</td>
</tr>
</tbody>
</table>
Important: If you attempt to navigate away from a sheet in which changes have been made, a Leave Site? warning appears. Click Cancel, and Save your changes. Changes are lost if you click Leave.

Display Options
Sheets display accounts down the first column as row headings, and time periods across the remaining columns.
Click the Display Options Button on the toolbar if you wish to adjust your view of sheets. The Display Options dialogue box opens, and you may adjust the Time Range, Levels and Accounts.

*Display Options differ on some sheets.*

Important: To view an annualized budget, uncheck the Month and Quarter amounts for every year. The recommended display option is to include (check) the Month and Year for FY2020 and only the Year for all other fiscal years.
**Data Entry in Sheets**

The following guidelines help you to understand how data is displayed and may be manipulated in sheets.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>43</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4,753</td>
<td>3,857</td>
<td>5,000</td>
<td>417</td>
<td>417</td>
<td>550</td>
<td>1,383</td>
</tr>
<tr>
<td>14</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4,216</td>
<td>6,005</td>
<td>4,200</td>
<td>350</td>
<td>350</td>
<td>350</td>
<td>1,050</td>
</tr>
<tr>
<td>1,945</td>
<td>1,211</td>
<td>1,800</td>
<td>150</td>
<td>150</td>
<td>150</td>
<td>450</td>
</tr>
<tr>
<td>34</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Cell Background Color:**
- **White** = editable; type a value or enter a formula
- **Blue** = subtotals (i.e. quarter or year total)
- **Gray** = read-only, locked (may contain a value or formula)
- **Red** = contains an error

**Cell Value:**
- **Black** = data is saved within the Version
- **Blue** = the value has been modified since the last Save
- **Green** = Actuals value

**Triangle in Cell Corner:**
- **Red** = a Cell Note is attached
- **Purple** = a formula is in the cell

**Right-click Menu**

While in your sheet, you may access a **Right-click Menu** that displays a list of available options. The options vary depending on the active cell.

**Right-click Menu on an Editable Cell**

**Right-click Menu on a Subtotal Cell**
Copy Forward

Copy Forward and Copy Downward are Right-click Menu options used to copy content from one cell to consecutive editable cells across or down a sheet.

Your options for copying include:
Copy Forward
- Copy to End – copies current value to the last period in the sheet
- Advanced – copies current value with options to increase or decrease

Copy Downward (This feature is not recommended for the WFU model.)
- Copy to End – copies current value to the last row of the column

Copy Forward > Advanced brings up the Advanced Copy Forward dialogue box in which you enter a Value, select an option to Copy until, and if desired, select an option to Increment by and enter a Value for incrementing.

1. Key a value in a cell.
2. Press Enter.
3. Right-click to bring up the Right-click Menu.

Important: Remember to Save your work.
Breakback Spread Method
The Breakback feature allows you to enter a value in a time range roll-up field (subtotal) and spread it over the time periods in that range. For example, entering a value of 10,000 in the Q1-FY20 field for an account will open the Breakback Rollup Value dialogue box. You may then select how to spread that value over the entire quarter.

![Breakback Rollup Value Dialogue Box](image)

Your Breakback values appear in blue as recently edited fields.

Adjust Values
When there is a need to adjust values of a range of cells, you may use the Adjust feature found in the Right-click Menu.
1. Select a range of values.
2. Right-click on the highlighted range.
3. Select Adjust from the menu.
This opens the Adjust Values dialogue box, where you will select the type of adjustment – **Change proportionally by** a certain amount, **Change evenly by** a certain amount or an **Increment by** or **Decrement by** value or percentage.

**Splits**

We can use Splits to break down values in an account into further categories or create sub-rows in sheets that roll-up to the original row. For instance, you can reassign costing allocation from 100% in one department to some other percentage over multiple departments. We can use Splits in the **Filled Positions** and **New Positions** sheets.

**To add a Split (ex: costing allocation):**

1. Right-click the cell that should be split.
2. Select **Split Row** from the **Right-click Menu**.
3. Edit the **Allocation %**, and press Enter.
4. Repeat steps 2 and 3.
5. Ensure you’ve selected the correct **Level** for each allocation.
6. Your original row should recalculate to 100%.
7. **Save** your changes.

**Important:** Adjusting values of cells that contain formulas overwrites the formulas.

**Important:** Be sure to select the correct department for the Split.

*Coordinate merit and funding changes with the other budget manager.*

*The Copy Row feature is not the same as a Split.*

Splits may be deleted using the **Right-click Menu > Delete Row.** In this example, deleting a costing allocation Split will leave the Allocation % at the percentage of the remaining row. Edit the Allocation % to ensure it is the correct value.
Formulas

Calculated cells are created by using formulas, which are typed either directly in the cell or in the **Formula Bar**. Begin all calculations with the equal symbol, and notice how it appears in both the active cell and in the **Formula Bar**.

![Formula Bar](image)

Complete your formula and press Enter, or click the green **Confirm** button on the far right of the **Formula Bar** to complete your entry. Upon reselecting that cell, you will see the formula in the **Formula Bar**, and a formula indicator in the cell. Click **Save** on the sheet toolbar to see the formula results displayed in the calculated cell. The red **Clear** button removes the formula and cell contents.

The **Formula Assistant** is an optional method for creating calculated cells. Right-click a cell to open the **Right-click Menu**, and select **Formula Assistant**. The Formula Assistant dialogue box contains your accounts and mathematical operators allowing you to point and click to build your formula.

![Formula Assistant](image)
Notes

A Note is a way to provide additional information regarding a cell or a sheet. There are two types of notes: Cell Note and Sheet Note.

A Cell Note is specific to an Account, Time, Level and Version, and is attached to one cell. A red triangle in the upper right corner of a cell is an indicator that a note is present. Hovering over the triangle reveals the Note.

To add a Cell Note:
1. Right-click a cell.
2. Click Add Note from the Right-click Menu.
3. Type your note.
4. Click OK.

Other Note options in the Right-click Menu include Edit Note and Remove Note.

Cell Note Facts:
- Cell Notes can be viewed in the cell, by using the Explore Cell feature (see next section), on reports, or by using the Search Cell Notes feature on the My Sheets page of Sheets Overview.
- The Note on each cell is visible and editable by all users who have access to the sheet. Editing the Note changes what others see.
- Each Note displays who created or last edited it.
- Cell Notes have a character limit of 4,000.
- A Cell Note is editable as long as the cell is editable.

A Sheet Note is specific to a Level and Version, and is attached to the sheet. The Sheet Notes icon changes after a Note is added.

To add a Sheet Note:
1. Click the Sheet Notes icon in the upper right corner your sheet toolbar.
2. Type your note.
3. Click OK.

Sheet Note Facts:
- Sheet Notes are editable and viewable by users with view/edit access to the sheet.
- There is only one Sheet Note per sheet.
- Sheet Notes have a character limit of 4,000.
- Date and name stamps appear on the Note.
- Sheet Notes cannot be included on reports.
Explore Cell / Cell Explorer

You may review the details of a cell by using the Cell Explorer found on your toolbar, or by accessing Explore Cell from the Right-click Menu of a cell. The Explore Cell dialogue box opens and presents information related to that cell.

Use Cell Explorer / Explore Cell to:

- View formulas
- View Notes
- View / access contributing data
- Link to other sheets on which an account is visible
The Filled Positions – Base Pay sheet contains data from Workday. This sheet feeds the Personnel Summary sheet, which feeds the Operating Budget sheet. Some important tips for this sheet include the following:

- **Scheduled Hours**
  - Drives Fringe Rate
  - Impacts Annual Comp for non-exempt employees
  - Use hours from Scheduled Hours report

- **Frequency**
  - Base Pay amount is shown as annual or hourly

- **% Increase**
  - Used for merit adjustments

- **$ Increase**
  - Used for promotional increases
  - Market adjustments
  - Living wage
  - Decrease in hours for exempt
  - Other lump sum adjustments
  - For positions with an hourly frequency, any change to this amount is incremental to the hourly rate
  - For promotions, use this column to zero out the Annual Comp on this position, by entering a negative amount. Use the New Position sheet to budget for the new position.
  - For positions that are ending, use this column to zero out Annual Comp on this position, by entering a negative amount.

- **Reason Code**
  - Listed in the dropdown menu
    - Merit Increase
    - Market Adjustment
    - Merit & Market Increase
    - Living Wage
    - Merit & Living Wage
- Costing Allocation Change Only
- Promotion (WD)
- Change in Hours (WD)
- Exemption Status Change (WD)
  - Reason Codes with (WD) require dual entry into Workday
  - Available report, Changes in Base Pay that Require Workday Action

*Merit, market and living wage will be loaded into Workday via EIB.*

- **Funding**
  - **Level**
    - Positions that are split funded are editable at the Home Cost Center Level, but available as read-only view for budget impact – coordinate changes with applicable Budget Specialist or Budget Manager
    - Unrestricted Operating Cost Center
    - Restricted Worktags
    - Splits may be added (see Splits, page 14)

*Cost allocations will be loaded via EIB into Workday.*

- **Comments** – used to confirm your intentions of changes that might be questioned at a higher level or by the Budget Office; Comments may be useful for reference in the future as to why you made a certain change.

- **Fringe Rate** – calculates based on Scheduled Hours

- **Annual Fringe** – calculated amount annualized

- **Attributes**
  - **Proposed hourly rate**
    - Applicable to non-exempt staff, but displayed for all positions
  - **Group** (you can use this column to sort the sheet if this makes planning easier)
    - Non-exempt staff
    - Exempt staff
    - Faculty
  - **Family** - used for driving calculations to operating accounts
  - **Pay Frequency** – used for calculations that feed to the operating accounts on the Personnel Summary sheet; biweekly payments will budget as they are expected to post to the general ledger
The **Filled Positions – Other Compensation** sheet is used for planning allowances such as faculty stipend and Mobile Communication Device (MCD). It includes data from Workday. Some important tips for this sheet include the following:

- **Reason Code**
  - List available in the dropdown menu
    - No Change
    - Merit Increase
    - Costing Allocation Change
    - Remove Allowance
    - Change MCD Amount
  - Any change to MCD level requires Workday action
  - Increases or decreases in an allowance will be loaded into Workday via EIB
  - New allowances should be entered on the **New Position** sheet

- **Funding**
  - **Level**
    - Positions that are split funded are editable at the Home Cost Center Level, but available as read-only view for budget impact – coordinate changes with applicable Budget Specialist or Budget Manager
    - Unrestricted Opening Cost Center
    - Restricted Worktag
    - Splits may be added (see *Splits*, page 14)

  *Costing allocations will be loaded via EIB into Workday.*

- **Attributes**
  - **Group** (you can use this column to sort the sheet if this makes planning easier)
    - Non-exempt staff
    - Exempt staff
    - Faculty
  - **Family** - used for calculations that feed to the operating accounts on the **Personnel Summary** sheet
  - **Pay Frequency** – used for feeding to operating accounts as biweekly will budget as expected to post to the general ledger
The **New Positions & Allowances** sheet is used for positions approved in the Annual Budget Committee Review process and are part of the Guideline Budget. It will also be used to record positions related to promotions and exemption changes or new allowances for current employees or when associated with new positions. Some important tips for this sheet include the following:

- **First**, you will need to add a new row by clicking the add row button.

- **Employee ID** – select current employee or choose New Hire

- **Employee Name** – will populate if Employee ID is selected

- **Hire Date** – estimated date of hire
  This does not prorate the budgeted salary as the annualized amount will be added to the budget. To prorate you can make adjustments on the **Personnel Summary** sheet on the appropriate **Unallocated** line.

- **Scheduled Hours**
  - Drives Fringe Rate
  - Impacts Annual Pay calculation for non-exempt employees
  - Use hours from **Scheduled Hours report**

- **Compensation Plan**
  - List available in the dropdown menu
    - Base Pay
    - Communication Hierarchy
    - Faculty Hierarchy
    - Faculty & Staff Hierarchy
    - Staff Hierarchy
    - Other Hierarchy
    - Global AWAKEings Program Exchange
    - Global AWAKEings

  **Important:** ‘**Hierarchy**’ plans are expandable lists. Be sure to expand the list and select a plan from the list.

  **Do not** choose Compensation Plan hierarchies. Select a sub-plan beneath the hierarchy.

- **Compensation**
  - Hourly rate for non-exempt or Annual amount for exempt staff and faculty

- **Frequency**
• Annual or Hourly

• **Pay Frequency**
  o Monthly or Bi-Weekly

• **Reason Code**
  o New approved position
  o Repurposing vacant position
  o Assigning open funding
  o Adding new allowance
  o New position for promotion
  o New position for exemption change

• **Funding**
  o **Level**
    ▪ Unrestricted Operating Cost Center
    ▪ Restricted Worktags
    ▪ Splits may be added (see Splits, page 14)

  *Cost allocations will be loaded via EIB into Workday.*

• **Fringe Rate** – based on **Scheduled Hours**

• **Annual Fringe** – calculated amount annualized

• **Approved Position ID** – *if already set up in Workday*

---

**Important:**
Remember to **Save** your work.
The **Vacant Positions** sheet is for positions to be active in Workday as of 7/1/19 with no incumbent. Some important tips for this sheet include the following:

- **Action**
  - Positions that are to be used in calculating the budget require that *Budget Position* is selected from the dropdown menu

- **Scheduled Hours** – required

- **Proposed Amount** – required

- **Funding %** - required
  - Splits may be added (see Splits, page 14)

- Managers and talent liaisons should use the **Close Position Task** in Workday to make a position inactive

---

**Important:**
Remember to **Save** your work.
The Personnel Summary sheet summarizes plan information in the general ledger accounts that will be transferred to the Operating Budget sheet. Some important tips for this sheet include the following:

- **Level and Activity/Location** fields must be selected correctly. Use **Activity/Location Uncategorized** for anything with no activity attached.

- **Unallocated lines**
  - Used for adjustments for faculty and staff that need to be made based on data coming from other personnel sheets
  - **Example**: You may want to adjust a monthly amount if the employee will not be hired until January.
  - **Example**: For staff that are non-exempt, but will work overtime, the amount of 37.5 hours to 40 hours should be entered in the Unallocated line under 51500.

- **Other Pooled personnel expense accounts**:
  - 51012 Faculty – Summer
  - 51013 Faculty – Budget Unallocated
    - Open budget not dedicated to a vacant/new position or contingency/retention funds
  - 51505 Staff – Pooled Budget
    - Positions that are job management
- **51506** Staff – Budget Unallocated
  - Open budget not dedicated to a vacant/new position or contingency/retention funds
- **51502** Staff – Teaching
- **51700** Student personnel expense
- **51750** Graduate Stipends
- **Overtime, Bonus & Supplemental** accounts

---

**Important:**
Remember to **Save** your work.
The **Operating Budget** sheet is for planning revenue and non-personnel expenses by **Level** (cost center) and **Activity/Location**. The personnel expenses lines are calculations pulling from the **Personnel Summary** sheet. Some important tips for this sheet include the following:

- **Level and Activity/Location** fields must be selected correctly. Use **Activity/Location Uncategorized** for anything with no activity attached. The **Activity/Location** field is searchable.

- **Level and Activity Summary** report found in the **Getting Started** folder, shows cost centers with previous budget and activity that will help in your navigation to the activities for which you may want to update or plan.

- Selecting **Activity/Location – All** will summarize all activities including no activity, and is not editable.

- **Display**
  - Green number represents actuals; black represents plan
  - White cells are editable
  - Gray cells pull data from other sheets
  - Blue cells are subtotals

- **Available Data Entry Options**
  - Breakback
  - Copy Forward

- **Display Options** - when displaying a new account, uncheck the option to **Suppress rows if all zeros or blank**. Budget in the new account, then return to the **Display Options** to turn on the **Suppress rows if all zeros or blank** option.
Reports

Any reports available to your Levels are accessed from the Shared Reports folder on the Reports page. Below is a list of some commonly used folders and their contents.

Getting Started:
- Adaptive Insights Training Manual
- Budget Calendar
- Budget Checklist
- Scheduled Hours Report
- Level and Activity Summary – use this report to verify which activities or locations have budget or actual in them to utilize during the operating budget process
- FY20 Guideline Budget vs FY19 Budget – review your FY20 budget guideline as it compares to the FY19 budget. The FY20 Guideline represents your FY19 permanent budget plus any approved incremental changes (like merit) or additional funding requested and approved during the 5 year planning process.

Personnel Reports:
These reports are used for reconciling data inputs and posting to the Operating Budget.
- Base Pay – Employee Increase Summary – compares current compensation to proposed compensation showing % change
- These other reports were developed as we audited the accuracy of the calculations, feel free to use them if needed
  - Base Pay – Fringe Calculation Detail
  - Base Pay – Sheet to Ledger Reconciliation
  - New Request – Fringe Calculation Detail
  - New Request – Sheet to Ledger Reconciliation
  - Other Compensation – Fringe Calculation Detail
  - Other Compensation – Sheet to Ledger Reconciliation
  - Vacant – Fringe Calculation Detail
  - Vacant- Sheet to Ledger Reconciliation
Requires Workday Action:

- Changes in Base Pay that Require Workday Action
  - Budget changes that require dual entry in Workday
    - Promotions
    - Changes in scheduled hours
    - Exemption status change
    - Ending job and Terminating Employment
- New Positions that may Require Workday Action
  - Create new positions and requisitions in Workday
- Other Compensation Changes that Require Workday Action
  - New allowances or changes to MCD amount will require entry into workday
- Vacant Positions that Require Workday Action to Close
  - To inactivate a position in Workday use the Close Position Task

Submission Audit:

- Budget vs Guideline
  - Operating Summary Report by Account
  - Operating Surplus/(Deficit) by Level vs Guideline
- Personnel Sheets
  - Other Compensation Change should be on New Position Sheet
  - Positions in Base Pay Sheet w/no increase & conflicting reason
  - Positions in Base Pay Sheet with decrease in salary
  - Positions in Base Pay Sheet with no reason code selected
  - Selected Hierarchy Comp Plan instead of Comp Plan

To run and view a report, click once on a report link. Your report opens with the most current content. Each report’s toolbar may differ depending on the report type.

Commonly used tools include:

<table>
<thead>
<tr>
<th>Tool</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save As</td>
<td>Save as a new report into your Personal Reports folder as either HTML, Excel or PDF</td>
</tr>
<tr>
<td>Export</td>
<td>Export the report as an Excel file or PDF</td>
</tr>
<tr>
<td>Snapshot</td>
<td>Save the report as a snapshot into your Personal Reports folder</td>
</tr>
<tr>
<td>Email</td>
<td>Email the report to individuals, groups or Levels</td>
</tr>
<tr>
<td>Filter</td>
<td>Set criteria by which to filter the report’s contents</td>
</tr>
<tr>
<td>Information</td>
<td>View report information such as Version and how the content is sorted</td>
</tr>
<tr>
<td>Printable View</td>
<td>Downloads the report as an Excel file</td>
</tr>
</tbody>
</table>

Alternatively, you may access some of these features by right-clicking a report’s link to reveal the Right-click Menu.
Take a **Snapshot** of a report:
To preserve your original data before making changes, take a Snapshot of the report and save in your **Personal Folder** to compare later reports.

1. Open your report.
2. Click the **Save As Snapshot** button [ ]. The Snapshot dialogue box opens.

   ![Save As Snapshot](image)

3. Add the current date to the Name.
4. **Save**.

To add a **Filter** to a report:

1. Click a report link to open it.
2. Click the **Filter** button [ ] on your toolbar.
3. Select your criteria from the dropdown menus.
4. To add another filter criteria, click the **Add Filter** button [ ] and enter your criteria.
5. Click **Apply**, and the report should refresh with your filter applied.

![Manage Filter](image)
To remove a Filter from a report:
1. With the report open, click the Filter button on the toolbar.
2. Click Clear All to remove all Filters at once.
3. To remove an individual Filter, click the Delete Filter button beside that Filter.
4. Click Apply.

To Export a report to Excel or PDF:
1. Hover over the Export button on the report toolbar.
2. Select Export to Excel or Export to PDF.
3. Navigate to your desired location, and Save.

For a report exported to Excel, the report data appears on one sheet. Another sheet contains the report Information.

To Email a report:
1. Click the Email Report button on the toolbar. The Email Report dialogue box opens.
2. Click inside the To field or the plus at the end of the field.

The Select Recipients dialogue box opens.
3. Select the **Available Users** tab, and search for and highlight the name(s) of your recipient(s).
4. Click the add recipients button to add the selected names to the **Selected Recipients** box.
5. Click **OK** to return to the **Email Report dialogue box**.
6. If desired, edit the **Subject** field and **Message**.
7. You may elect to send a copy to yourself.
8. Click **Send**.
Submission and Budget Guidelines

All Working Budgets at the Level or Level Roll-up must be in balance with the fiscal year Guideline before submission. In preparation for submitting your Level, run the reports in the Submission Audit folder. Compare the current fiscal year’s Budget to the Guideline. Are you in balance or less?

Level Budget Specialists can see their Level progress from the Sheets Overview page. A Level Workflow Status section is visible with the previously accessed Level’s status information.

Use the Level dropdown menu to view other Levels.

In Progress Levels can be submitted, or a Note added and saved.
Submitted Levels can be recalled as long as they are in a **Submitted for Review** status.

A rejected Level can be resubmitted upon any required revisions or adjustments. A Budget Level Manager may **Reject** a Level and include a **Note** with concerns or instructions.

An **Approved** Level is no longer editable by the Budget Level Specialist.
An **Approved and Locked Status** is an indication that the Budget Level Manager has submitted the Level Roll-up, locking all Levels.

**Important:** There are no automatic emails or notifications sent when Levels are submitted.
The Workflow feature is available for Level Budget Managers. The manager can manage submission, approval and rejection of Levels.

The Workflow page displays all Levels (including Roll-ups) for which the Level Budget Manager is responsible.

The Workflow Status tab displays the Name of all Levels and Level Roll-ups, Status, Last Updated By and Last Updated On. The Detail pane on the right is associated with the selected Level. Notes may be added to that Level.
Possible Statuses:

<table>
<thead>
<tr>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Progress</td>
</tr>
<tr>
<td>Submitted for Review</td>
</tr>
<tr>
<td>Approved</td>
</tr>
<tr>
<td>Approved and Locked (Levels must be Approved prior to being Approved and Locked.)</td>
</tr>
<tr>
<td>Rejected (Levels must be submitted prior to being Rejected.)</td>
</tr>
</tbody>
</table>

**Important:** Submitting a Level Roll-up automatically sets all Levels to the **Approved and Locked status**. To unlock, the manager must **Recall** the Roll-up. This resets all Levels to **Approved** status, allowing the manager to **Reject** any.

**Warning message when submitting a Level Roll-up**

Submitted Roll-up, and Approved and Locked Levels.

![Workflow Status Table](image)
Sheets Overview Page and Level Workflow Status for Managers

Level Budget Managers may also view the Level Status, Submit, Approve or enter and Save Note Only for a Level from the Sheets Overview page. A Level Workflow Status section is visible with the previously accessed Level’s status information.

Use the Level dropdown menu to view other Levels.

Submitted Levels from Level Budget Specialists Managers may use the Level Workflow Status area of the Sheets Overview page to take action on Levels that have been submitted to them by Level Budget Specialists. The options are to Approve, Reject or enter and Save Note Only.