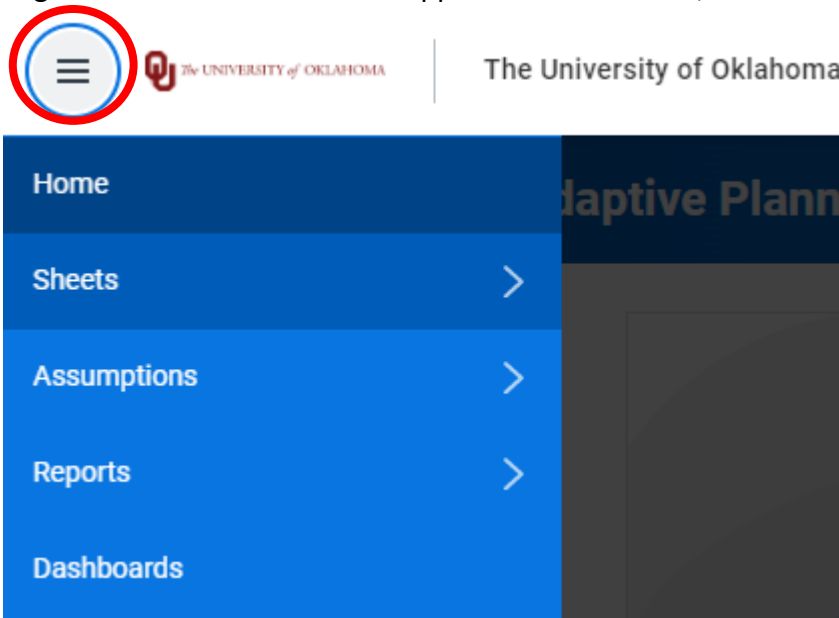


Adaptive Planning Job Aid – FY25 Budget Submission

The purpose of this job aid is to demonstrate how to view all your budget data in Adaptive, make any necessary changes, and submit your budget to the Budget Office. Access for budget submission and approval will be provided during the formal budget window of **April 1 through April 30**. Outside of these dates, the system is available for viewing only. Users can access Adaptive here: <https://sso.ou.edu/idp/startSSO.ping?PartnerSpId=https%3A%2F%2Flogin.adaptiveinsights.com%3A443%2Fsaml%2F1Ux> . The main menu can be accessed at any time by clicking the icon in the upper left hand corner.

Step 1: Viewing Sheets

- Log in. Click on the  in the upper left hand corner, and select the 'Sheets' tab. This will take you to the Sheets Overview page.



- In the top right “Level” menu, select the Org you want to view. This is a drop-down menu which mirrors the Org tree in PeopleSoft, and will allow you to select a parent level or individual Orgs:

The screenshot shows the 'Sheets' application interface. At the top right, there is a 'Level' dropdown menu currently set to 'Top Level', which is circled in red. Below this, a search window is open, displaying a hierarchical tree of organizational units. The 'FN_BUDGET Budget Office' is highlighted with a red box and a red circle. The main content area shows a list of sheets under the 'Level Assigned' tab, including 'Income Statement', 'Personnel Sheet - Norman', 'Personnel Sheet - HSC', 'Other Compensation Pooled - Norman', 'Other Compensation Sheet - HSC', and 'Non-Compensation Planning'.

- The 3 sheets that contain all your budget data include:
 - Personnel Sheet – Norman: contains all active non-pooled position data
 - Other Compensation Pooled – Norman: contains all active pooled position data
 - Non-Compensation Planning: contains all of your maintenance and operations data

1. **Personnel Sheet:** This sheet is updated by HR at the end of March in preparation for the budget window. Once the budget window opens on April 3, this data will not be updated again during the budgeting period.

The following changes can be made to this sheet:

- 1) Funding distribution changes
- 2) FTE
- 3) Budgeted Annual Salary
- 4) Budgeting of unfilled positions

Of the possible changes to the sheet, only distribution changes will be effective in PeopleSoft HR beginning July 1. Changes to an individual's salary or FTE, and position hires will still require an ePAF to effect those changes in HR during the fiscal year.

#	POSITION	EMPLOY...	EXPENSE ACCOUNTS(*)	FUND(*)	FUNCTION(*)	ENTITY(*)	PROJECT	SOURCE	PURPOSE	DISTRIBUTION %(*)	FTE(*)	REASON C...	ANNUAL SALARY(*)	INCREASE %	DISTRIBUTION SALARY	BUDGETED SALARY + FRINGE	FRINGE RA...	FRINGE BENEFITS	NOTES	HIRE DATE(*)	REHIRE DA...	TERMINATION DA...	JOB CO...	REGULAR / TE...	EMPLOYEE TY...	UNIT	COMBO C...
1	00022923...	427229 - ...	511011 Salary-Staff Full ...	EDGEN - E...	00116 - Instit...	00000 - DE...	No_Project			100.00%	0.76	No Change	48,925		48,925	48,708	24.30%	16,781.27		6/8/2008	6/8/2008		0193	Regular	Seasoned	NORMN	8000018
2	00025854...	453698 - ...	511011 Salary-Staff Full ...	EDGEN - E...	00116 - Instit...	00000 - DE...	No_Project			100.00%	1.00	No Change	264,525		264,525	338,397	24.30%	92,702.08		2/17/2014	2/17/2014		6446	Regular	Seasoned	NORMN	8000018
3	01190 - FI...	404416 - ...	511011 Salary-Staff Full ...	EDGEN - E...	00116 - Instit...	00000 - DE...	No_Project			100.00%	1.00	No Change	53,500		53,500	71,880	24.30%	18,380.80		1/8/2001	2/27/2006		0321	Regular	Seasoned	NORMN	8000018
4	03060 - A...	436929 - F...	511011 Salary-Staff Full ...	EDGEN - E...	00116 - Instit...	00000 - DE...	No_Project			100.00%	1.00	No Change	95,427		95,427	126,188	24.30%	32,731.48		11/24/2008	11/24/2008		0188	Regular	Seasoned	NORMN	8000018
5	01284 - DI...	468462 - ...	511011 Salary-Staff Full ...	EDGEN - E...	00116 - Instit...	00000 - DE...	No_Project			100.00%	1.00	No Change	113,150		113,150	181,960	24.30%	38,810.48		11/30/2017	11/30/2017		8101	Regular	Seasoned	NORMN	8000018
6	Total														575,927	772,933		197,495.76									

Please review all chartfield information, including Distribution %, FTE, and Annual Salary.

#	POSITION	EMPLOY...	EXPENSE ACCOUNTS(*)	FUND(*)	FUNCTION(*)	ENTITY(*)	PROJECT	SOURCE	PURPOSE	DISTRIBUTION %(*)	FTE(*)	REASON C...	ANNUAL SALARY(*)	INCREASE %
1	00022923...	427229 - ...	511011 Salary-Staff Full ...	EDGEN - E...	00116 - Instit...	00000 - DE...	No_Project			100.00%	0.76	No Change	48,925	
2	00025854...	453698 - ...	511011 Salary-Staff Full ...	EDGEN - E...	00116 - Instit...	00000 - DE...	No_Project			100.00%	1.00	No Change	264,525	
3	01190 - FI...	404416 - ...	511011 Salary-Staff Full ...	EDGEN - E...	00116 - Instit...	00000 - DE...	No_Project			100.00%	1.00	No Change	53,500	
4	03060 - A...	436929 - F...	511011 Salary-Staff Full ...	EDGEN - E...	00116 - Instit...	00000 - DE...	No_Project			100.00%	1.00	No Change	95,427	
5	01284 - DI...	468462 - ...	511011 Salary-Staff Full ...	EDGEN - E...	00116 - Instit...	00000 - DE...	No_Project			100.00%	1.00	No Change	113,150	
6	Total													

To make changes to the funding distribution, double click inside the applicable line's cell, modify the value, then click the **save** icon in the top blue bar:

EMPLOY...	EXPENSE ACCOUNTS(*)	FUND(*)	FUNCTION(*)	ENTITY(*)	PROJECT	SOURCE	PURPOSE	DISTRIBUTION %(*)	FTE
427229 - ...	511011 Salary-Staff Full ...	EDGEN - E...	00116 - Instit...	00000 - DE...	No_Project			50	
453698 - ...	511011 Salary-Staff Full ...	EDGEN - E...	00116 - Instit...	00000 - DE...	No_Project			100.00%	
404416 - ...	511011 Salary-Staff Full ...	EDGEN - E...	00116 - Instit...	00000 - DE...	No_Project			100.00%	
436929 - F...	511011 Salary-Staff Full ...	EDGEN - E...	00116 - Instit...	00000 - DE...	No_Project			100.00%	
468462 - ...	511011 Salary-Staff Full ...	EDGEN - E...	00116 - Instit...	00000 - DE...	No_Project			100.00%	

To budget ¹ a salary increase, input the desired value in the Increase % field, then click **save**. Once you have saved, you will notice the grey fields to the right of the Increase % will automatically update to reflect the increase:

S(*)	FUND(*)	FUNCTION(*)	ENTITY(*)	PROJECT	SOURCE	PURPOSE	DISTRIBUTION %(*)	FTE(*)	REASON C...	ANNUAL SALARY(*)	INCREASE %	DISTRIBUTION SALARY	BUDGETED SALARY + FRINGE	FRINGE RA...	FRINGE BENEFITS	NOT
Full ...	EDGEN - E...	00116 - Instit...	00000 - DE...	No_Project			100.00%	0.76	No Change	48,925	10	48,925	65,706	34.30%	16,781.27	
Full	EDGEN - F	00116 - Instit	00000 - DE	No_Project			100.00%	1.00	No Change	264,525		264,525	355,257	34.30%	90,733.08	

¹ This change only budgets for the salary increase. To change a position's actual salary, you must submit an ePAF through Human Resources.

SOURCE	PURPOSE	DISTRIBUTION %(*)	FTE(*)	REASON C...	ANNUAL SALARY(*)	INCREASE % ▾	DISTRIBUTION SALARY	BUDGETED SALARY + FRINGE	FRINGE RA...	FRINGE BENEFITS	NOTES	HIRE DATE(*)	REHIRE DATE	TERMINATION DATE	JOB CI
		100.00%	0.76	No Change	48,925	10.00%	53,817	72,277	34.30%	18,459.40		6/5/2006	6/5/2006		0193

Vacant positions that are anticipated to be filled during the fiscal year can also be budgeted with the following steps:

- 1) Add a row by clicking the Add Row icon in the blue bar

The University of Oklahoma | Sheets / Personnel Sheet - Norman

The UNIVERSITY of OKLAHOMA

FY202

#	POSITION	EMPLOY...	EXPENSE ACCOUNTS(*)	FUND(*)	FUNCTION(*)	ENTITY(*)	PROJECT	SOURCE	PURPOSE	DISTRIBUTION %(*)	FTE(*)	REASON C...	ANNUAL SALARY(*)	INCREASE % ▾	DISTRIBUTION
1	00022923...	427229 - ...	511011 Salary-Staff Full ...	EDGEN - ... ▾	00116 - Instit...	00000 - DE...	No_Project			100.00%	0.76	No Change	48,925	0.00%	
2	00025854...	453698 - ...	511011 Salary-Staff Full ...	EDGEN - E...	00116 - Instit...	00000 - DE...	No_Project			100.00%	1.00	No Change	264,525		
3	01190 - FI...	404416 - ...	511011 Salary-Staff Full ...	EDGEN - E...	00116 - Instit...	00000 - DE...	No_Project			100.00%	1.00	No Change	53,500		
4	03060 - A...	436929 - F...	511011 Salary-Staff Full ...	EDGEN - E...	00116 - Instit...	00000 - DE...	No_Project			100.00%	1.00	No Change	95,427		
5	01284 - DI...	468462 - ...	511011 Salary-Staff Full ...	EDGEN - E...	00116 - Instit...	00000 - DE...	No_Project			100.00%	1.00	No Change	113,150		
6	Total														

- 2) Input a valid position number
- 3) Type "vacant" in the employee field, then selecting any of the vacant entries to use as a placeholder
- 4) Input all applicable chartfield information, including GL Expense Account, Fund, Function, Distribution %, FTE, and Annual Salary
- 5) Once you click the **save** icon, the grey columns will auto-populate with salary and fringe data

#	POSITION	EMPLOY...	EXPENSE ACCOUNTS(*)	FUND(*)	FUNCTION(*)	ENTITY(*)	PROJECT	SOURCE	PURPOSE	DISTRIBUTION %(*)	FTE(*)	REASON C...	ANNUAL SAL
1	00022923...	427229 - ...	511011 Salary-Staff Full ...	EDGEN - ...	00116 - Instit...	00000 - DE...	No_Project			100.00%	0.76	No Change	
2	00025854...	453698 - ...	511011 Salary-Staff Full ...	EDGEN - E...	00116 - Instit...	00000 - DE...	No_Project			100.00%	1.00	No Change	
3	01190 - FI...	404416 - ...	511011 Salary-Staff Full ...	EDGEN - ...	00116 - Instit...	00000 - DE...	No_Project			100.00%	1.00	No Change	
4	03060 - A...	436929 - F...	511011 Salary-Staff Full ...	EDGEN - E...	00116 - Instit...	00000 - DE...	No_Project			100.00%	1.00	No Change	
5	01284 - DI...	468462 - ...	511011 Salary-Staff Full ...	EDGEN - E...	00116 - Instit...	00000 - DE...	No_Project			100.00%	1.00	No Change	
+	03060												
6	Total												

#	POSITION	EMPLOYEE	EXPENSE ACCOUNTS(*)	FUND(*)	FUNCTION(*)	ENTITY(*)	PROJECT	SOURCE	PURPOSE	DISTRIBUTION %(*)	FTE(*)	REASON C...	ANNUAL SAL
1	00022923...	427229 - Mohrmann,Kate L	511011 Salary-Staff Full ...	EDGEN - ...	00116 - Instit...	00000 - DE...	No_Project			100.00%	0.76	No Change	
2	00025854...	453698 - Berkinshaw,Stewart...	511011 Salary-Staff Full ...	EDGEN - E...	00116 - Instit...	00000 - DE...	No_Project			100.00%	1.00	No Change	
3	01190 - FI...	404416 - Simpson,Cindy K	511011 Salary-Staff Full ...	EDGEN - ...	00116 - Instit...	00000 - DE...	No_Project			100.00%	1.00	No Change	
4	03060 - A...	436929 - Flores,Andrea M	511011 Salary-Staff Full ...	EDGEN - E...	00116 - Instit...	00000 - DE...	No_Project			100.00%	1.00	No Change	
5	01284 - DI...	468462 - McPhetridge,Patrici...	511011 Salary-Staff Full ...	EDGEN - E...	00116 - Instit...	00000 - DE...	No_Project			100.00%	1.00	No Change	
+	03060 - A...	V00158 - Vacant,Vacant											
6	Total												

Showing rows

Employee
Search

« Back to Employee tree All

Dimension Values	Description
V00158 - Vacant,Vacant	
V00159 - Vacant,Vacant	
V00161 - Vacant,Vacant	
V00162 - Vacant,Vacant	
V00163 - Vacant,Vacant	
V00164 - Vacant,Vacant	
V00166 - Vacant,Vacant	

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#	POSITION	EMPLOYEE	EXPENSE ACCOUNTS(*)	FUND(*)	FUNCTION(...)	ENTITY(*)	PROJECT	SOURCE	PURPOSE	DISTRIBUTION %(*)	FTE(*)	REASON C...	ANNUAL SALARY(*)	INCREASE %	DISTRIBUTION SALARY	BUDGETED SALARY + FRINGE	FRINGE RA...	FRINGE BENEFITS	NOTES
1	03060 - A...	V00158 - Vacant/Vacant	511011 Salary-Staff Full ...	EDGEN - E...	00116 - Instit...	00000 - D...				100.00%	1.00		40,000		40,000	53,720	34.30%	13,720.00	

2. **Other Compensation Pooled Sheet:** This sheet is also updated by HR at the end of March in preparation for the April budget window and can currently be viewed, but not modified, until the budget window formally opens.

The same changes can be made to this sheet as with the Personnel sheet. Please ensure that the Annual Salary amount reflects the desired FY25 budget for that pooled position, rather than actual earnings from the current year.

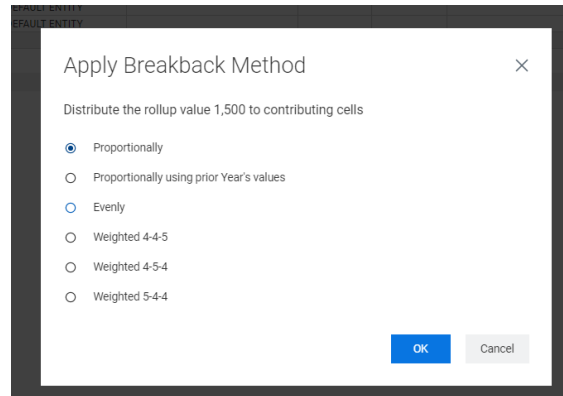
Remember to **save** all changes.

3. **Non Compensation Planning Sheet:** This sheet has two columns, one showing your FY24 original M&O budget, the other with the proposed FY25 budget. Please review the Account (budget category), Fund, Function, and all other chartfield information. These fields have dropdown menus from which you can alter your selections.

To modify FY25 budgeted amounts, double click inside the FY25 cell, type desired value, and press enter. You will be prompted to select a methodology by which to distribute this annual amount among the months of the fiscal year. In most cases, proportionally will be the appropriate selection. Click **OK**.

#	ACCOUNTS	FUND	FUNCTION	ENTITY	PROJECT	SOURCE	PURPOSE	NOTES	FY2021	FY2022
1	MISC - Budget Only	EDGEN - E...	00116 - Institutional Support	00000 - DEFAULT ENTITY					2,100	2,100
2	SUPPLIES	EDGEN - E...	00116 - Institutional Support	00000 - DEFAULT ENTITY					1,991	2,386
3	TRAVEL	EDGEN - E...	00116 - Institutional Support	00000 - DEFAULT ENTITY					6,000	6,000
4	Total								10,091	10,486

Showing rows 1-3 of 3.

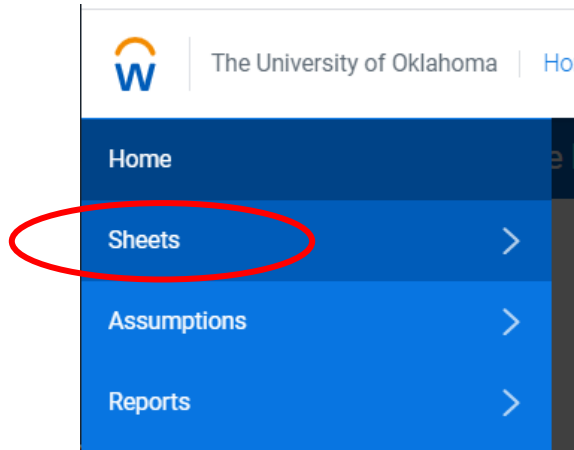


Remember to **save** all changes.

Step 2: Submitting Sheets for Approval

Once all three sheets for any Org have been finalized, the budget for that Org can be submitted for review. If you do not have any users without approval access submitting on behalf of your Org, you can skip to Step 3: Approving Sheets.

- Navigate to the Sheets Overview page by clicking on the W in the upper left corner, then selecting the Sheets tab:



- Ensure that the appropriate Org is selected in the Level menu in the upper right corner:

The screenshot shows the 'Sheets' application interface. The top navigation bar is blue with the title 'Sheets'. Below it, there's a search bar and a 'Level' dropdown menu set to 'ADN03090 BUDGET OFFICE', which is circled in red. To the right of the dropdown is a 'Workflow Status' section with a blue 'IN PROGRESS' button. The main content area shows a list of sheets under the 'Level Assigned' tab, including 'Revenue Input Sheet', 'Housing & Dining Model', 'Dentistry - Revenue Model', 'wRVU', 'Patient - Revenue Model', 'Backend Sheets', 'Budget Amendments', 'Consolidated Budget Data Dump', 'Consolidated Expense Budget', 'Do Not Use (DNU)', and 'Budget Request'.

- Next to the “Level” drop-down menu, click on the blue IN PROGRESS link to expand workflow status options:

The close-up screenshot shows the 'Level' dropdown menu set to 'ADN03090 BUDGET OFFICE'. The 'Workflow Status' section has a blue 'IN PROGRESS' button circled in red.

- In the Level Workflow Status section on the right side of the page, add any notes if necessary, then click the **Submit** button.

The screenshot displays the 'Sheets' application interface. On the left, a navigation menu includes 'Overview', 'Level Assigned', and 'Assumptions'. The main content area shows a list of sheets under the 'Level Assigned' tab, with a search bar at the top. The right sidebar displays the 'Level Workflow Status' as 'IN PROGRESS' for 'ADN03090 BUDGET OFFICE', updated by 'Nicole McPhetridge' on 'Jul 22, 2021'. At the bottom right, 'Approve' and 'Submit' buttons are visible, with the 'Submit' button circled in red.

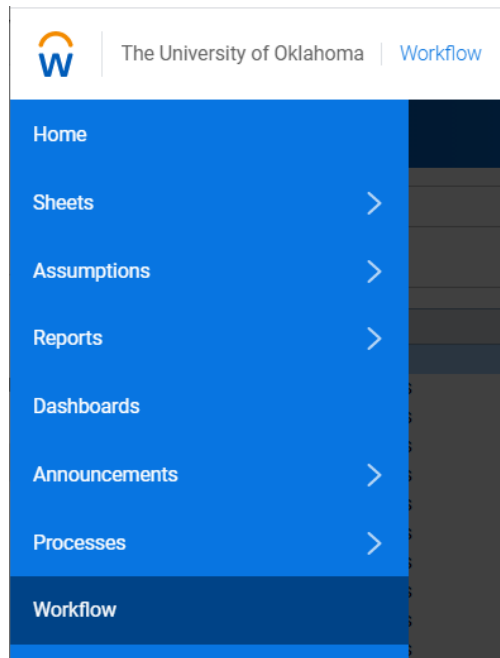
- Once you click submit, you can view data in all your sheets, but that data cannot be modified. To make additional modifications, notify the Approver for that Org, and the Approver can then reject changes to make the sheets available for additional inputs.

Step 3: Approving Sheets

Users with Approval Access can both submit and approve Orgs, and submission is not required prior to approval. If an Org has been submitted for review, that Org can either be Approved or Rejected. Approving an Org will change the Org's status to 'Approved' and will lock the Org's data, thereby preventing additional modifications. Rejecting an Org will open the sheet for additional modification by any user with access to that Org.

For Approvers who are constructing their department's budget, individual Orgs may be approved prior to submitting the department's budget to the Budget Office, but this is not required. Such Approvers may skip Step 3 and proceed to Step 4.

- Navigate to the Workflow tab from the main menu



- Expand the Level structure until you reach the Org in question. You can see the icon to the left of the Org name, as well as the status, indicate the Org has been submitted for review.



Workflow Status

Detail: ADN03090 BUDGET OFFICE

Workflow Status

Search

Name	Status	Last Updated By
Levels		
NORMN	In Progress	
SAN02701 INTERFRATERNITY COUNCIL	In Progress	
SAN02901 GREEK AFFAIRS (FSPS)	In Progress	
SAN02801 PANHELLENIC	In Progress	
ACADAFF Academic Affairs	In Progress	
ADMINFIN_N Administration & Finance	In Progress	
CFON CFO Norman	In Progress	
FN_ADTADJ Audit Adjustments	In Progress	
FN_BUDGET Budget Office	In Progress	
ADN03090 BUDGET OFFICE	Submitted for review	Nicole McPhetridge
FN_BURSAR Bursars Office	In Progress	
FN_CNTRLR Controllers Office	In Progress	
FN_ERM Enterprise Risk Management	In Progress	
FN_PAYROLL Payroll Office	In Progress	
FN_RSRCHFS Research Financial Office	In Progress	
FN_SHRDSVC Shared Services	In Progress	
FN_VP VP Admin Affairs	In Progress	
HRN Human Resources Norman	In Progress	
IFT IT Tulsa	In Progress	
ITN IT Norman	In Progress	
ATHLETICS Athletic Department	In Progress	
DIV_INC Diversity & Inclusion	In Progress	Kate Mohrmann

Name
ADN03090 BUDGET OFFICE

Status
Submitted for Review

Note

Last updated: Nicole McPhetridge on Mar 8, 2021 @ 12:57 PM PST

Approve

Reject

Save Note Only

- Once you have reviewed the data in that Org's sheet, you can then Approve (if no changes need to be made), or Reject (if additional changes are required). The user who submitted the Org for approval will be notified once the status changes.
- Approved Orgs will show as below:



Workflow Status

Detail: ADN03090 BUDGET OFFICE

Workflow Status

Search

Name	Status	Last Updated By
Levels		
▼ NORMN	In Progress	
▶ SAN02701 INTERFRATERNITY COUNCIL	In Progress	
▶ SAN02901 GREEK AFFAIRS (FSPS)	In Progress	
▶ SAN02801 PANHELLENIC	In Progress	
▶ ACADAFF Academic Affairs	In Progress	
▶ ADMINFIN_N Administration & Finance	In Progress	
▶ CFON CFO Norman	In Progress	
▶ FN_ADTADJ Audit Adjustments	In Progress	
▶ FN_BUDGET Budget Office	In Progress	
▶ ADN03090 BUDGET OFFICE	Approved	Nicole McPhetridge
▶ FN_BURSAR Bursars Office	In Progress	
▶ FN_CNTRLR Controllers Office	In Progress	
▶ FN_ERM Enterprise Risk Management	In Progress	
▶ FN_PAYROLL Payroll Office	In Progress	
▶ FN_RSRCHFS Research Financial Office	In Progress	
▶ FN_SHRDSVC Shared Services	In Progress	
▶ FN_VP VP Admin Affairs	In Progress	
▶ HRN Human Resources Norman	In Progress	
▶ IFT IT Tulsa	In Progress	
▶ ITN IT Norman	In Progress	
▶ ATHLETICS Athletic Department	In Progress	
▶ DIV_INC Diversity & Inclusion	In Progress	Kate Mohrmann

Name

ADN03090 BUDGET OFFICE

Status

✔ Approved

Note

Last updated: [Andrea Flores](#) on Jan 21, 2021 @ 6:06 AM PST

Reject

Save Note Only

Step 4: Submitting the entire college/unit budget to the Budget Office

- Navigate to the Workflow tab from the main menu
- Once all the Orgs within your area have been approved, you can then select the highest level available to you (which captures all Orgs that fall within that area), and click Submit. This action submits everything that falls within that 'parent' level up to the next level for review. If there are no approvers at the next level up, the approval will continue up the Org tree until it reaches the Budget Office.
- The Budget Office will communicate with you if any additional changes are required.

NOTE ON REJECTION: Once a roll-up level (e.g., an entire college or VP area) has been submitted to the Budget Office, if any lower level or individual org is rejected by the Budget Office, all levels that fall under the roll-up level will be notified. For instance, if College A has orgs ABC12345, ABC12346, and ABC12347, and the entire college budget was submitted but only ABC12345 requires rejection, the workflow will still show all orgs as rejected and users with permissions to those orgs will be notified. To avoid this effect, you may email the Budget Office a list of orgs to be reviewed, and we will notify you if any levels require changes.