



User Guide

September 1, 2015

Table of Contents

1. Adaptive Insights	2
2. Browsers	2
3. Logging into Adaptive Insights	3
4. User Security – Roles and Levels.....	4
Roles	4
Levels.....	4
5. Navigating the Announcements Page.....	5
A. Locating Announcements	5
B. Budget Office Links.....	5
6. Accessing Reports.....	6
A. Locating Reports	6
B. Viewing Reports	6
7. Reports Toolbar	8
A. Save As.....	8
B. Filter.....	9
C. Printable View & Export Report	10
8. Unit Reports.....	10
A. Budget vs Actual	11
B. Unit History.....	11
C. Unit Report & Unit Report YTD.....	12
9. Budget Requests	12
A. Adjustments to Original Budget	13
B. Capital Requests.....	13
C. Inflationary Requests.....	13
D. Original Budget Variance.....	14
E. SPIF Requests.....	14
10. Repeating Reports	15
11. Help & Contacts.....	16

1. Adaptive Insights

Adaptive Insights is a comprehensive web-based application that will be used for budgeting, planning, and forecasting. Adaptive can be accessed from anywhere by web or mobile. The same Funds, Organizations (called Levels in Adaptive), Accounts, and Programs will be used in Adaptive.

Adaptive Insights is **NOT** a financial transaction system and is not replacing Banner. Banner will still be used to check budget availability, to view transaction detail, enter requisitions, etc.

2. Browsers

Adaptive Insights supports the following browsers:

Windows-Based Browsers:

- **Internet Explorer:** Latest version, plus two prior releases
- **Mozilla Firefox:** Latest version of, plus ESR* release
 - *ESR is an official release of Firefox for desktop use by organization including schools, universities, business, and others who need extended support for mass developments
- **Google Chrome:** Latest version
 - **NOTE:** Google Chrome will not be updating plugins like Java and will not work with Adaptive in the near future

Mac Browsers:

- **Firefox:** Latest version, plus two prior versions
- Mac OS X 10.7 (Lion), 10.8 (Mountain Lion), and 10.9 (Mavericks)

Tablet Browsers:

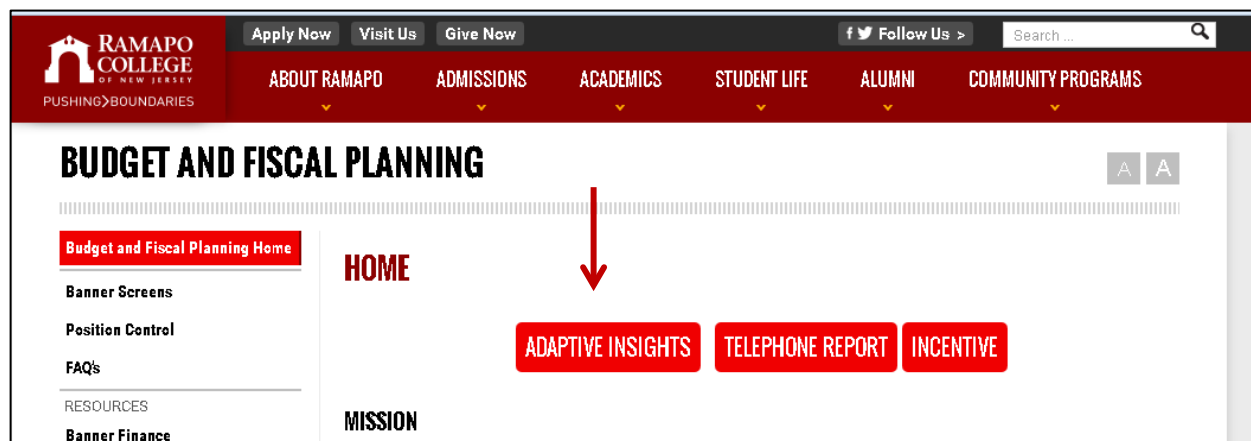
- iOS: iPad 4 (Safari)
- Android: Galaxy Tab 3 (Chrome)
- Windows: MS Surface Pro (IE)

Call ITS Support at Ext. 7777 for issues with Internet browsers; **do not** call Adaptive or the Budget Office.

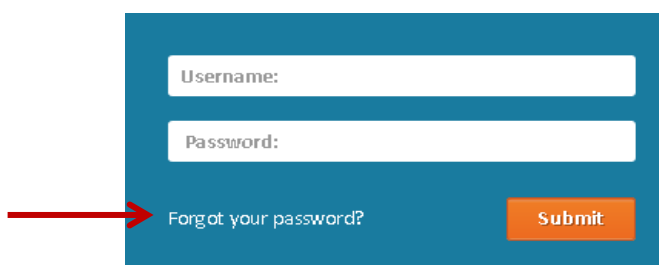
3. Logging into Adaptive Insights

1. Go to www.adaptiveinsights.com OR to the Budget Office webpage at www.ramapo.edu/budget and click on the “Adaptive Insights” button.

Login with your email address and password.



2. If a user has forgotten their password, select the link “Forgot your Password?”. An email will be sent containing a link to reset the password.



3. To change a password after logging in, go to the upper right corner of the home page. Click on the down arrow and select Settings.



4. In the top right, enter the old password, a new password, and then verify the new password one more time. Click save at the bottom of the page.

Old password:	<input type="password"/>
New password:	<input type="password"/>
Verify new password:	<input type="password"/>

4. User Security – Roles and Levels

Every user is assigned both a Role and a Level.

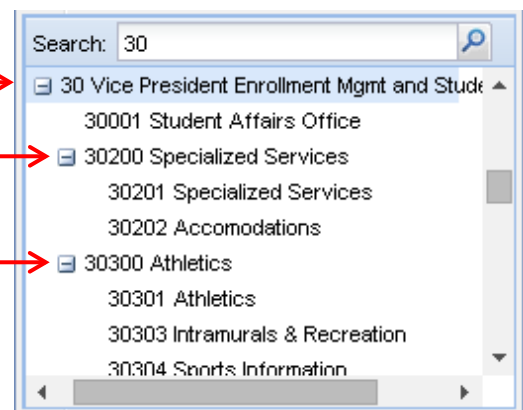
Roles enable a user to perform certain functions such as entering data in sheets or accessing reports.

- **Report Only:** Users will have access to view all reports and Dashboards published to them, but will not have access to create reports or edit data on sheets.
- **Standard:** Unit Directors can edit data on sheets, access and create reports, see salary Level detail, see which users are logged in, and approve Levels in Workflow. In Discovery, user can view Dashboards published to them, edit Personal Discovery Dashboards, and use analysis tools.
- **Discovery:** User can view Dashboards published to them, edit Personal Discovery Dashboards, and use analysis tools.

Levels provide access to data for the appropriate areas of the college. Some users may have more than one Level.

- Access to reports is granted by Level or by user.
- A user can save a report with the “Show all data regardless of Level” option, allowing viewers of the report to see data for all Levels available.
 - If a user tries to drill into data he/she normally does not have access to, the system will not allow a user to drill any further and will display an error message.
 - Access cannot be granted by folder, nor can reports be assigned to an individual user.

Users will only see those Levels that he/she has been given access to in the drop-down selectors on reports.



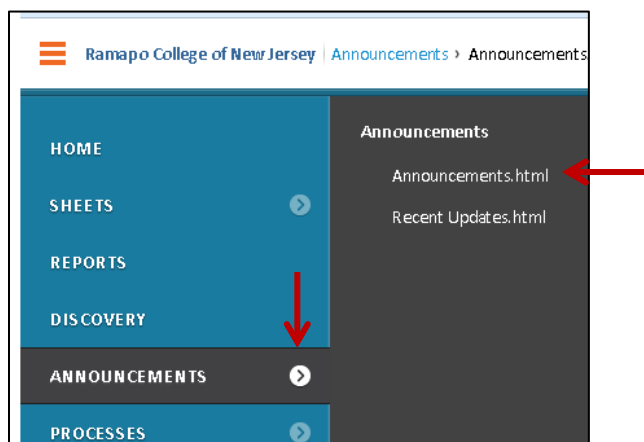
5. Navigating the Announcements Page

A. Locating Announcements

- Hover over the Navigation Icon in the top left corner.



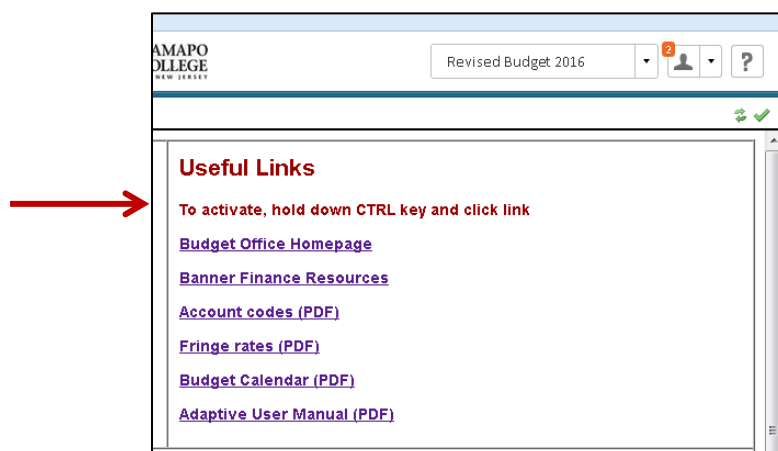
- Hover over Announcements and choose Announcements.html.



B. Budget Office Links

On the Home Page contains links to the Budget Office files including the Budget Office Homepage, Banner Finance Resources, Account Codes, Fringe Rates, the Budget Calendar, and the Adaptive User Manual

To view one of these link, hold down the CTRL key and click the link you want to see.



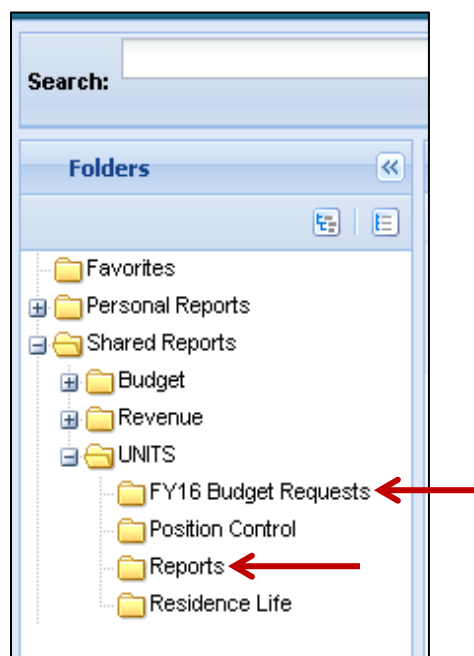
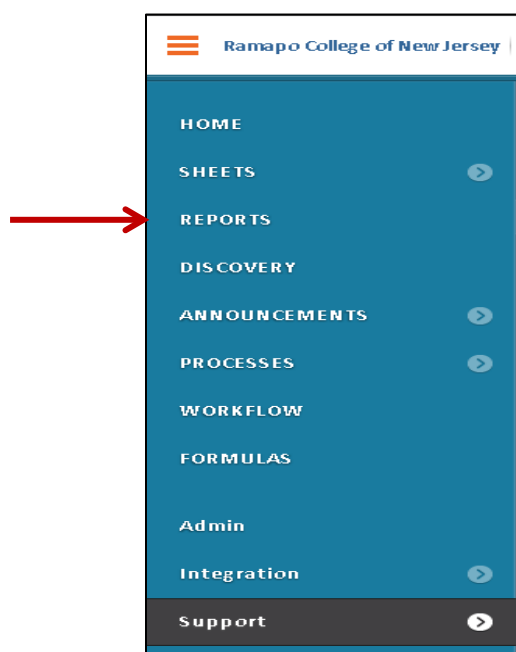
6. Accessing Reports

A. Locating Reports

- Hover over the Navigation Icon in the top left corner.



- Click on “Reports”. Click the plus sign (+) to open Shared Reports, then click the plus sign (+) again to open UNITS. The folders needed are:
 - a. Reports
 - b. FY16 Budget Requests

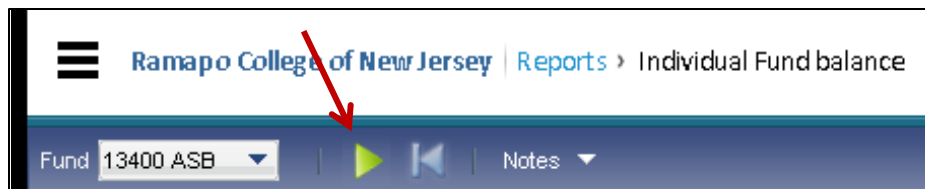


B. Viewing Reports

To view more than one report simultaneously, there are two options:

1. Hold down the CTRL key and click on “Reports” next to the Navigation Icon. It will open in a new tab to the Reports page. Open a report in the new tab.
2. Click & Hold the “Reports” link next to the Navigation Icon. Keep holding and drag the link to the top of the browser to open a new tab. Open a report in the new tab.

NOTE: If a report is filtered, the green triangle must be clicked on to run the report.



Some reports may have **Rollups**, or totals of multiple accounts. To view Rollups:

- Click on the plus sign (+) next to the Rollup to see a breakdown of the Rollup.
- Click on the minus sign (-) next to the Rollup to go back.
 - a. **NOTE:** Rollups can be broken down more than once

+ Revenue (Rollup)	335,801
+ Expenses (Rollup)	484,673
Statement of Net Position	(148,872)

Salaries can be broken down again

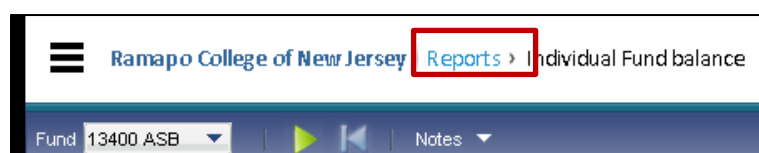
- Revenue (Rollup)	
+ Net Tuition (Rollup)	292,800
+ Net Fees (Rollup)	43,001
Total Revenue (Rollup)	335,801
- Expenses (Rollup)	
+ Salaries & Wages (Rollup)	418,468
+ Non-Salary Expenditures (Rollup)	66,205
Total Expenses (Rollup)	484,673

Some reports may have a **page size** at the bottom. Change the size to 1000 to ensure all data is shown in the report. After clicking on a page size, the report should automatically reload and should show the total number of rows.

46 20805 Graduate and Adult Admissions	5071	Decreased, return Mike Dibartolomeo cell phone allowance
47 20805 Graduate and Adult Admissions	5	Increased, A. Dovi cell phone allowance
48 20805 Graduate and Adult Admissions	25	Decreased, A. Dovi cell phone allowance
49 20805 Graduate and Adult Admissions	50	Decreased, reallocated to postage from pool.
50 20805 Graduate and Adult Admissions	100	Increased, return Mike Dibartolomeo cell phone allowance
	500	
	1000	

Page 1 Page Size 50

Click on “Reports” next to the Navigation Icon. **NOTE:** If a user leaves a filtered report, the filter will be lost when the user goes back to the report. Save Reports in Personal Folders to keep filters (Section 6).



7. Reports Toolbar

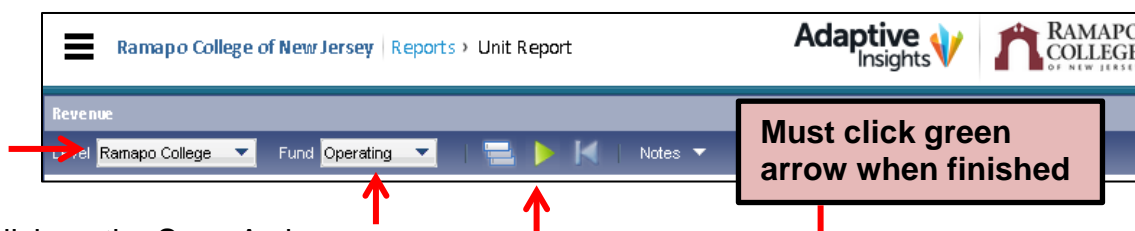
At the top right of each report is a set of icons and buttons to help breakdown reports. The picture below displays the buttons talked about in this section in order from left to right.



A. Save As

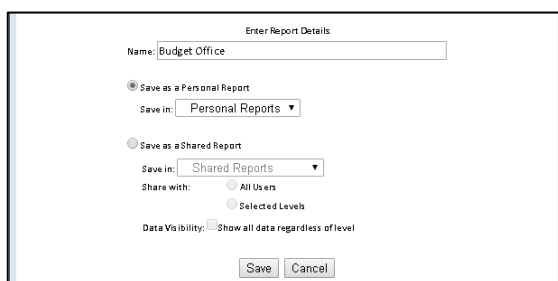
- Used to save personal reports or shared reports

1. Filter the report using filters or the Filter button (discussed next in this section).

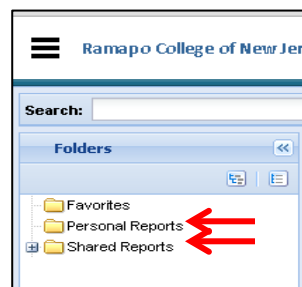


2. Click on the Save As icon.


3. In the Save Report pop up, name the new report. Then, click on either button for “Save as a Personal Report” OR “Save as a Shared Report”. Click Save. View a new report in Reports under either Personal Reports or Shared Reports.

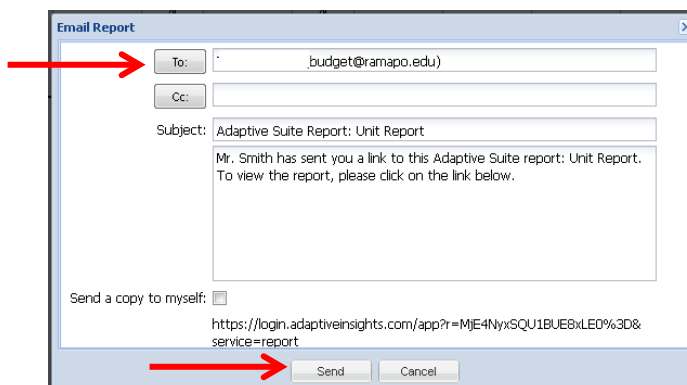


The image shows the 'Enter Report Details' dialog box. It has a 'Name' field with 'Budget Office' entered. There are two radio buttons: 'Save as a Personal Report' (selected) and 'Save as a Shared Report'. Below the radio buttons are 'Save in' dropdown menus: 'Personal Reports' for the personal report and 'Shared Reports' for the shared report. There are also 'Share with' options: 'All Users' and 'Selected Levels'. A 'Data Visibility' checkbox is checked, labeled 'Show all data regardless of level'. At the bottom are 'Save' and 'Cancel' buttons.



4. After creating a personal report, use the Email Report button to share with other Adaptive users.
 - a. **NOTE:** To share Adaptive Reports, an email recipient must be an Adaptive User.

5. Open up the Personal Report and then click on the Email Report button.  Then, click on "To:" to select a contact or contacts. Click send.

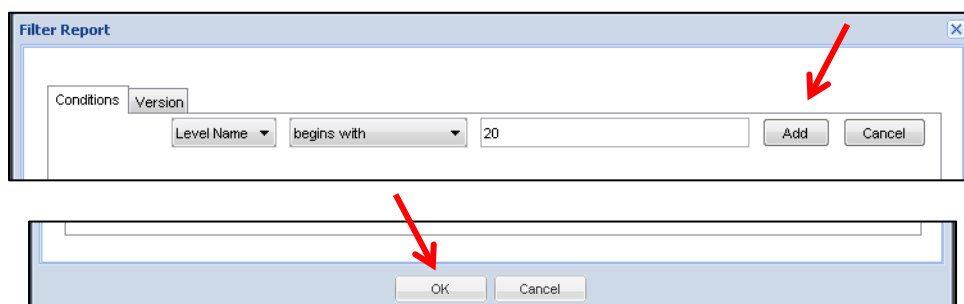


The "Email Report" dialog box is shown. It has fields for "To:" (with a red arrow pointing to it), "Cc:", and "Subject:". The "Subject:" field contains "Adaptive Suite Report: Unit Report". Below these fields is a text area with the message: "Mr. Smith has sent you a link to this Adaptive Suite report: Unit Report. To view the report, please click on the link below." At the bottom, there is a checkbox for "Send a copy to myself:" and a URL: "https://login.adaptiveinsights.com/app?r=MJE4NyxSQU1BUE8xLE0%3D&service=report". At the very bottom are "Send" and "Cancel" buttons, with a red arrow pointing to the "Send" button.

B. Filter



- Sort reports by Fund, Level/Org, Prog, Account, etc.
1. Click on Filter button to create a filter.
 2. Click Add. Use the drop down arrows to filter the report. For each filter, click add. Click ok when finished.

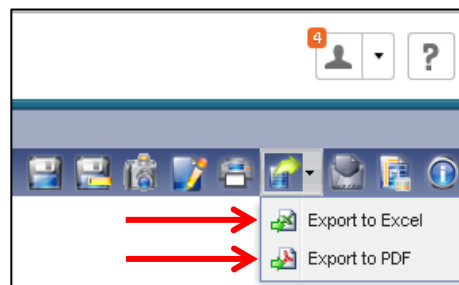
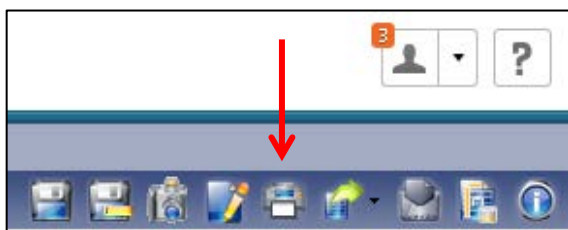


The "Filter Report" dialog box is shown. It has tabs for "Conditions" and "Version". Under "Conditions", there is a dropdown for "Level Name" set to "begins with" and a text field containing "20". To the right are "Add" and "Cancel" buttons, with a red arrow pointing to the "Add" button. Below this is a separate bar with "OK" and "Cancel" buttons, with a red arrow pointing to the "OK" button.



C. Printable View & Export Report

- Both used to export report to Excel. **Export Report** can also export to a PDF file:
- Filter a report to the correct Level/Org, and open all Rollups.
 - Either click on the printer icon or the arrow for the upload icon. If a user clicks the Export Report button, select “Export to Excel” or “Export to PDF”.



- Choose a location to save the Excel or PDF file and click save. Open the file.
- The Excel file will display the report uploaded from Adaptive.
 - NOTE:** To see a breakdown of Rollups in Excel, Rollups must be broken down beforehand in Adaptive. Once the report is uploaded to Excel, hiding or revealing Rollups is not possible.

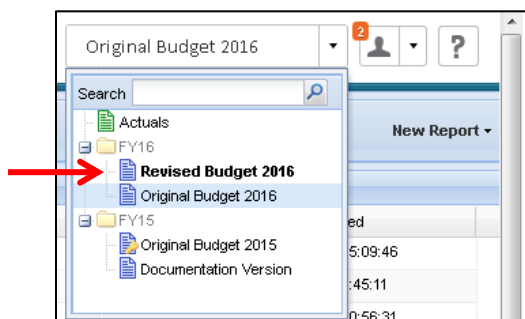
8. Unit Reports

Report data provides information based on the Level access assigned to each user. After going to the reports page, click on “Reports” under the UNITS folder to view:

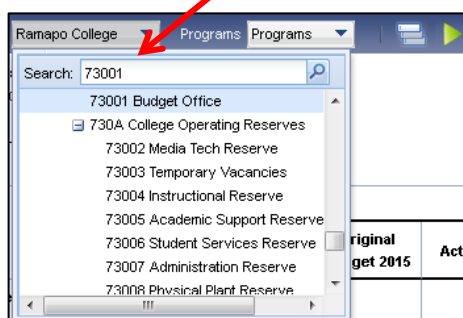
- Budget vs Actual
- Unit History
- Unit Report & Unit Report YTD

NOTE: You must be in Revised Budget 2016 version to view these Reports. To change the version:

- Open the Reports folder. This can be under the UNITS folder in Shared folders.
- In the top right of the page, change the version to Revised Budget 2016 in the FY16 folder.



Each report can be filtered by Fund, Level/Org, or Program. Search the name or its five digit code used in banner. (Ex: Budget Office = 73001)



Must click on green arrow after to run report

A. Budget vs Actual

- Displays Original Budget in comparison to the Actual Budget for current and previous year
- Filter by Level/Org or Program

Budget vs Actual						
Level	Ramapo College	Fund	Operating	Notes		
	2015			2016		
	Original Budget 2015	Actuals	Difference \$	Original Budget 2016	Actuals	Difference \$
Revenue						
Net Tuition (Rollup)	46,017,045	46,516,199	499,154	48,223,144	26,945,478	(21,277,666)
Net Fees (Rollup)	28,056,826	28,180,032	123,206	28,722,401	15,589,987	(13,132,414)
Other Income (Rollup)	1,527,566	1,676,921	149,355	1,407,279	123,118	(1,284,161)
Auxiliary Enterprise Revenue (Rollup)	33,522,474	34,616,698	1,094,224	34,454,725	15,302,459	(19,152,266)
Government Appropriations (Rollup)	43,275,548	36,989,252	(6,286,296)	42,454,806	0	(42,454,806)
Interest (Rollup)	200,000	90,378	(109,622)	100,000	0	(100,000)
Total Revenue	152,599,459	148,069,479	(4,529,980)	155,362,354	57,961,042	(97,401,313)
Expenses						
Salaries & Wages (Rollup)	95,336,581	85,286,269	(10,050,313)	96,941,962	32,439	(96,909,522)
Non-Salary Expenditures (Rollup)	57,262,878	53,438,276	(3,824,602)	58,420,393	2,873,987	(55,546,406)
Plant Bond Trustee (Rollup)	0	55,294	55,294	0	0	0
Total Expenses	152,599,459	138,779,839	(13,819,620)	155,362,354	2,906,426	(152,455,928)
Statement of Net Position	(0)	9,282,545	9,282,545	0	55,030,208	55,030,208

B. Unit History

- Displays Revenue and Expense Rollup for past three fiscal years and current YTD
- Filter by Level/Org or Fund

Level	Ramapo College	Fund	Operating	Notes			
	2013	2014	2015 YTD	2016 YTD			
	Actuals	Actuals	Actuals	Actuals			
Revenue							
Net Tuition (Rollup)	44,200,438	45,714,720	46,516,199	26,945,478			
Net Fees (Rollup)	26,260,114	28,101,067	28,180,032	15,589,987			
Other Income (Rollup)	3,249,599	1,372,970	1,676,921	123,118			
Auxiliary Enterprise Revenue (Rollup)	34,175,790	33,759,122	34,616,698	15,302,459			
Government Appropriations (Rollup)	36,868,885	40,111,510	36,989,252	0			
Interest (Rollup)	152,015	120,746	90,378	0			
Total Revenue	144,906,840	149,180,136	148,069,479	57,961,042			
Expenses							
Salaries & Wages (Rollup)	82,842,536	87,304,407	85,286,269	32,439			
Non-Salary Expenditures (Rollup)	53,450,786	55,214,034	53,438,276	2,873,987			
Plant Bond Trustee (Rollup)	0	24,227	55,294	0			
Total Expenses	136,293,322	142,542,668	138,779,839	2,906,426			
Statement of Net Position	8,613,518	6,637,467	9,282,545	55,030,208			

C. Unit Report & Unit Report YTD

- Displays Revenue and Expense Rollup for previous 3 years, current year, and next 3 years
- Revenue and expenses are broken down into more specific Rollups
- **Unit Report** can be filtered by Fund or Level/Org
- **Unit Report YTD** can be filtered by Level/Org or Prog

	Actuals				Original Budget 2016	Revised Budget 2016		
	2013	2014	2015 YTD	2016 YTD	2016	2017	2018	2019
Revenue (Rollup)								
Net Tuition (Rollup)	44,200,438	45,714,720	46,516,199	26,945,478	48,223,144	47,897,133	48,366,938	48,503,508
Net Fees (Rollup)	26,260,114	28,101,067	28,180,032	15,589,987	28,722,401	28,508,827	28,792,065	28,926,855
Other Income (Rollup)	3,249,599	1,372,970	1,676,921	123,118	1,407,279	1,435,854	1,465,339	1,486,066
Auxiliary Enterprise Revenue (Rollup)	34,175,790	33,759,122	34,616,698	15,302,459	34,454,725	34,144,456	33,727,180	11,099,678
Government Appropriations (Rollup)	36,868,885	40,111,510	36,909,252	0	42,454,006	42,419,498	42,793,941	43,173,197
Interest (Rollup)	152,015	120,746	90,378	0	100,000	100,000	100,000	100,000
Total Revenue (Rollup)	144,906,840	149,180,136	148,069,479	57,961,042	155,362,354	154,505,768	155,245,464	133,289,305
Expenses (Rollup)								
Salaries & Wages (Rollup)	82,842,536	87,304,407	85,286,269	32,439	96,941,962	97,305,134	98,478,619	99,666,742
Non-Salary Expenditures (Rollup)	53,450,786	55,214,034	53,438,276	2,873,987	58,420,393	59,281,620	59,486,553	61,331,514
Plant Bond Trustee (Rollup)	0	24,227	55,294	0	0	0	0	0
Total Expenses (Rollup)	136,293,322	142,542,668	138,779,839	2,906,426	155,362,354	156,586,755	157,965,172	160,998,257
Statement of Net Position	8,613,518	6,637,467	9,282,545	55,030,208	0	(2,080,987)	(2,719,708)	-27,708,952

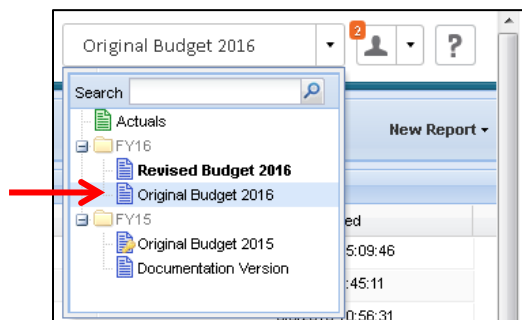
9. Budget Requests

The Budget Requests folder contains information on submissions related to the budget. Click on the Unit Reports folder to view more folders. Then, click on the "FY16 Budget Requests" folder to view:

- Adjustments to Original Budget
- Capital Requests
- Inflationary Requests
- Original Budget Variance
- SPIF Requests

NOTE: You must be in Original Budget 2016 version to view these Reports. To change the version:

1. Open the FY16 Budget Requests folder. This can be found under the UNITS folder in Shared folders
2. In the top right of the page, change the version to Original Budget 2016 in the FY16 folder.



A. Adjustments to Original Budget

- Displays changes in unit budgets from prior fiscal year

Adjustments to Original Budgets			
	Level ▲	Account	Comments
1	20002 Institutional Research	7001	Increased, FY14 Inflationary (never built in) printshop & Course eval.
2	20002 Institutional Research	7001	Increased, FY15 Inflationary for Copier
3	20002 Institutional Research	7001	Increased, Incentives for Surveys
4	20002 Institutional Research	7001	Increased, Printing of eval forms
5	20002 Institutional Research	7001	Increased, Surveys
6	20002 Institutional Research	7001	Increased, Travel

B. Capital Requests

- Displays the disposition of any capital improvement request

Capital Requests					
Version: Revised Budget 2015 Models: Capital Request Sorted By: Level in as cending order, Amt Req in as cending order, Amt Approved in as cending order, Amt Distrib. in as cending order, Contact in as cending order, Description of Capital Request in as cending order, Budget/VP Comments in as cending order, Division in as cending order					
	Level ▲	Amt Req	Amt Approved	Amt Distrib.	Contact
1	20001 Office Of The Provost	12,000	12,000		Space reorganization in the Office of the Provost reception area.
2	20003 Library	2,920	2,920		Installation of a panic duress switch at the library's circulation / front desk and research assistant area / desk
3	20003 Library	14,975	14,975		Library security gate to maintain the integrity of a library's collections. The main entrance has been without a functioning security gate for over 3 years. This leaves
4	20004 Security	40,000	40,000		Upgrade Security System

C. Inflationary Requests

- Details the budget increases requested and the disposition of each request

Ramapo College of New Jersey

Reports

Inflationary Requests

Adaptive Insights

RAMAPO COLLEGE OF NEW JERSEY

2

?

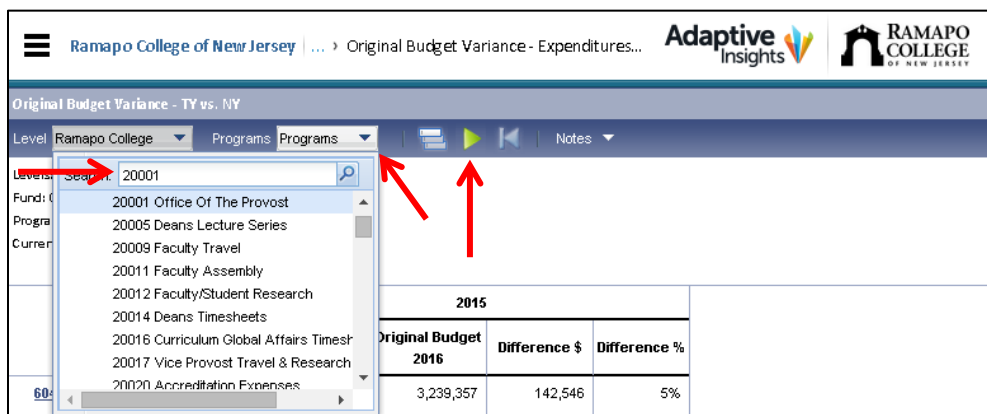
FY16 Inflationary Requests

	Unit ▲	Recurring	Amt Requested	VP Approved	
1	20002 Institutional Research	Yes	4,000	4,000	Diverse Learning Environment Survey
2	20003 Library	Yes	5,000	5,000	Periodicals Subscriptions and SO (Print/Online)
3	20003 Library	Yes	9,000	9,000	Paper and Toner Cost
4	20003 Library	Yes	14,000	14,000	Databases
5	20201 TAS	No	4,000	0	Robots & drones for Computer Science Artificial Intelligence course. This is an emerging area in computer technology

D. Original Budget Variance

- Unit budget by account for prior year and current year
- Displays changes in \$ and % change
- **NOTE:** Units are expected to remain within budget on all lines on this report, including Blanket Salaries, Stipend, Pool, Telephone & Postage, etc.

1. Search the name of the Level/Org or its five digit code used in Banner. (Ex: Office of the Provost = 20001)



Original Budget Variance - TY vs. NY

Level: Ramapo College Programs: Programs

Search: 20001

20001 Office Of The Provost

20005 Deans Lecture Series

20009 Faculty Travel

20011 Faculty Assembly

20012 Faculty/Student Research

20014 Deans Timesheets

20016 Curriculum Global Affairs Timesh

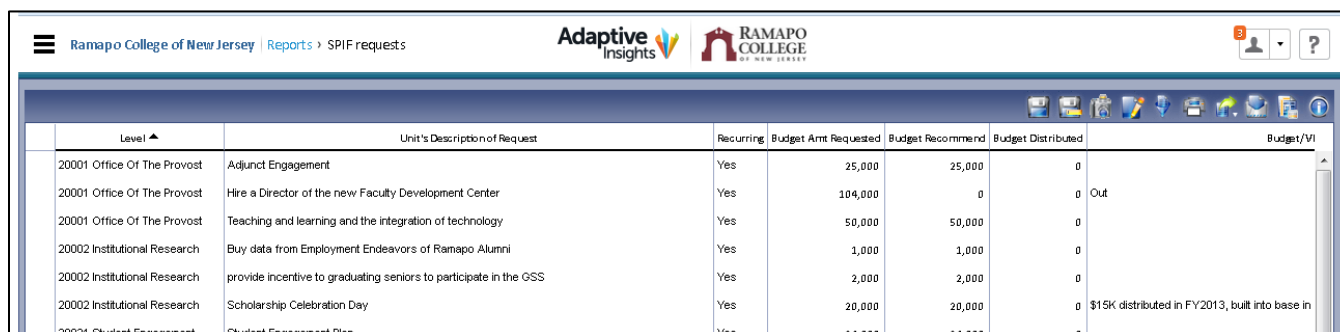
20017 Vice Provost Travel & Research

20020 Accreditation Expenses

2015		
Original Budget 2016	Difference \$	Difference %
3,239,357	142,546	5%

E. SPIF Requests

- Displays the disposition of any SPIF request

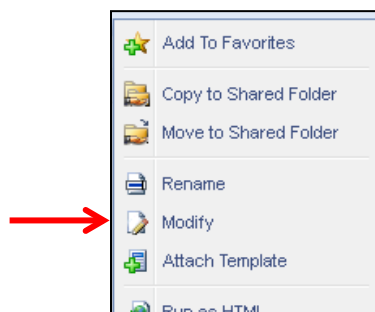


Level	Unit's Description of Request	Recurring	Budget Amt Requested	Budget Recommend	Budget Distributed	Budget/Vi
20001 Office Of The Provost	Adjunct Engagement	Yes	25,000	25,000	0	
20001 Office Of The Provost	Hire a Director of the new Faculty Development Center	Yes	104,000	0	0	Out
20001 Office Of The Provost	Teaching and learning and the integration of technology	Yes	50,000	50,000	0	
20002 Institutional Research	Buy data from Employment Endeavors of Ramapo Alumni	Yes	1,000	1,000	0	
20002 Institutional Research	provide incentive to graduating seniors to participate in the GSS	Yes	2,000	2,000	0	
20002 Institutional Research	Scholarship Celebration Day	Yes	20,000	20,000	0	\$15K distributed in FY2013, built into base in
20021 Student Engagement	Student Engagement Plan	Yes	24,000	24,000	0	

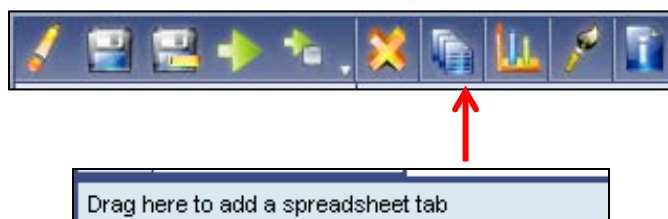
10. Repeating Reports

Unit Directors may be responsible for more than one Level (Organization). Their Rollup will only show the totals of all their divisions together. However, by using Repeating Reports, a Unit Director can upload a report to Excel and have multiple tabs that include their Rollup and each individual Level (Organization).

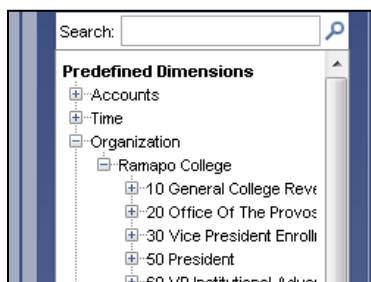
1. Scroll over the navigation icon in the top left corner and click on Reports.
2. Open up the Reports folder under the UNITS. Right click on the report you want to open. In the drop down menu, click on Modify. This will take you to the Matrix Report Builder.

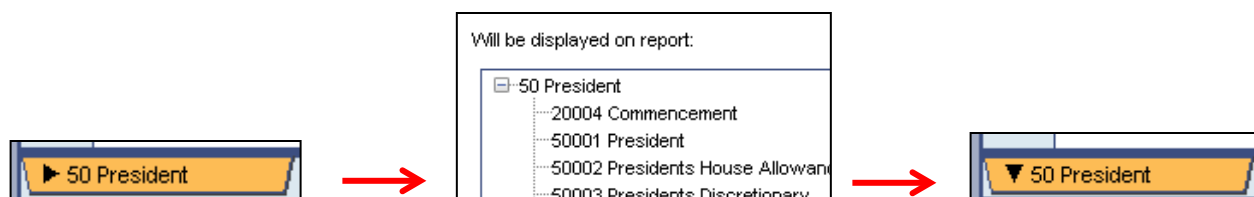


3. In the reports toolbar, click on the Repeating Reports button. A segment on the bottom of the page will appear.

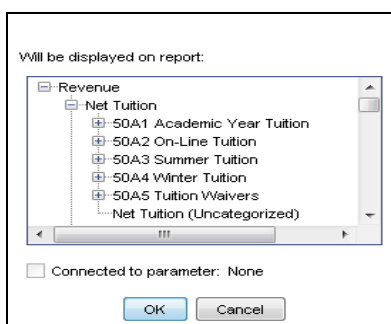


4. Open the filter tab, delete the "Organization" filter in order to create a Repeating Report by Org.
5. On the sidebar, locate Predefined Dimensions. Open up Organization, and then open up Ramapo College.
6. Drag all organizations to the bottom tab that reads, "Drag here to add a spreadsheet tab".
 - a. **NOTE:** Click on a rollup to drag the entire rollup to the tab.
 - b. **NOTE:** The arrow must be pointed down to show all organizations. If the arrow points right, right click on the tab, click properties, and then open the rollup.





7. Right click on either Revenue or Expenses, and then click Properties. Open up any rollups and accounts you might want to see.
 - a. **NOTE:** This step will have to be done twice if you need to change both Revenue and Expenses.



8. Run the report.



11. Help & Contacts

Browser Support: Call ITS helpdesk, Ext. 7777.

Adaptive Insights Technical Questions: Do **not** call Adaptive Insights. If you have any questions about the software, feel free to call Beth Walkley at Ext. 7266 or contact the Budget Office at budget@ramapo.edu.

Contacts:

Beth Walkley
 Director of Budget & Fiscal Analysis
 M207
 Ext. 7266
bwalkey@ramapo.edu

Kathy Stathis
 Budget & Systems Analyst
 M209
 Ext. 7763
kstathis@ramapo.edu

Matthew Palmer
 Financial Analyst
 D120
 Ext. 7617
mpalmer@ramapo.edu