Overview

This document provides you with some Quick Tips to make your use of Adaptive more streamlined and efficient.

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Setting the Announcements Page as your default Home Page

Once logged into Adaptive:

1. Select the user icon in the upper right-hand corner, then click View Profile.

2. Click the drop-down menu next to Home page and select Announcement Page.
3. Click **Save**.

### Hide the Supervisory Org Column

Once a sheet is open:

1. Click on the **Display Options** icon in the toolbar:

   ![Display Options](image)

2. Click on the **Hide Columns** tab, then check the box next to **Supervisory Organization (Future Release)**.

   ![Hide Columns](image)

3. Click **OK**.

   **CAUTION** Avoid hiding columns on a regular basis, as it is easy to forget they are hidden. Hidden columns could hide data.

### Displaying Years instead of Months/Quarters

Once a sheet is open:

1. Click on the **Display Options** icon in the toolbar:
2. Click on the **Time** tab, then check the box(es) in the **Year** column for the year(s) you want to display. Uncheck the box(es) in the **Month** and **Quarter** columns if you do not want Months and Quarters to display.

3. Click **OK**.

## Deleting Unwanted Rows

**CAUTION**

**Only use** Delete Row if you are correcting an error, such as a row added/duplicated in error or to delete a row that is no longer needed.

Even if the dollars are $0, there are often reasons to keep a line (keeping notes or remembering a person who was once in the budget, for example). Only delete if you are sure you do not need it anymore.

1. Select the row you want to delete.
   To Select an entire row (as opposed to individual cells), click in the Row # cell.

2. Select the Delete Row icon on the toolbar (or Right Click on the highlighted row(s) and select **Delete Row(s)**).

3. Confirm you wish to delete the row(s).
   When prompted, select **Delete**. Otherwise, select **Cancel**.
Cleaning up Conversion Placeholders

Placeholders for Gifts, Grants, and Designated came over in conversion and would appear in Input Sheets in the Gift Grant Designated column (GF999997, GR099999, DN999999).

If a conversion placeholder worktag remains, the data will not appear in reports. There is a new Quality Check report available to help identify where the conversion placeholder worktags appear so that you can find and replace them.

Once logged into Adaptive:

1. Navigate to Reports.
2. Click on Shared in the menu, then click on the folder titled 00. Quality Check
3. Click on the folder titled 01. Error Checking
4. Click on the report titled Conversion Placeholders by Sheet.
5. Select the parameters you want for the report by using the drop-down arrows next to Budget Version, Activity Cluster, Activity_Center, and Level, as desired. Then click Run Report.
6. Analyze the report results to determine which sheets contain DN999999, GR099999 or GF999997.

7. Navigate to each sheet listed and clean up the worktags by doing the following:
   a. Ensure you are in the Working Budget at the appropriate Cost Center Level.
   b. Click on the Filter icon in the toolbar, then type in the filter(s) you want (GF999997, GR099999, DN999999).
   c. Replace all conversion placeholders with either a real Gift, Grant or Designated worktag, or a usable Placeholder from this list (Note: The grant placeholders start with DN, not GR):

<table>
<thead>
<tr>
<th>Placeholder ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>DN002042</td>
<td>FD005 Unrestricted Sponsored Program Indirect Recovery Fund</td>
</tr>
<tr>
<td>DN002043</td>
<td>FD006 Unrestricted Sponsored Program Fund</td>
</tr>
<tr>
<td>DN002045</td>
<td>FD021 Restricted Federal Sponsored Program Fund</td>
</tr>
<tr>
<td>DN002046</td>
<td>FD022 Restricted Federal Sponsored Program Fund-Work Study</td>
</tr>
<tr>
<td>DN002047</td>
<td>FD069 Unrestricted Sponsored Program Residual Fund</td>
</tr>
<tr>
<td>DN002048</td>
<td>FD084 Restricted Private Sponsored Program Fund</td>
</tr>
<tr>
<td>GF999980</td>
<td>Gift from R&amp;V</td>
</tr>
<tr>
<td>GF999981</td>
<td>Endowment from R&amp;V</td>
</tr>
<tr>
<td>GF999982</td>
<td>Gift from Foundation</td>
</tr>
<tr>
<td>GF999983</td>
<td>Endowment from Foundation</td>
</tr>
<tr>
<td>GF999984</td>
<td>Unrestricted Gift</td>
</tr>
<tr>
<td>GF999985</td>
<td>Unrestricted Endowment</td>
</tr>
</tbody>
</table>

Navigating Other Resources

Quick Reference Guides:
- Navigating in Adaptive Sheets
- Navigating in Adaptive Reports

PDF of training slides for Introduction to Budgeting at UVA:
https://uvafinance.virginia.edu/resources/introduction-budgeting