Adaptive Planning: NRC Operating Budget Input Sheet

PPG Manager/Division Head

ENTER THE NRC OPERATING BUDGET

The budgeting cycle commences in September when Finance builds the budget and communicates the budget envelope at divisional level to all Division Directors. The steps are:
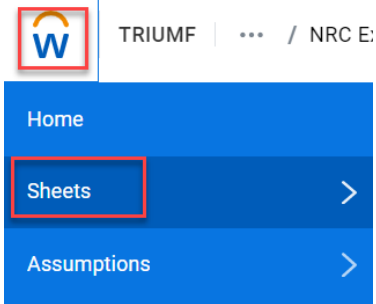
- NRC PPG (Project Program Grant) managers (also referred to as Account holders) input budget (by spend category) into Current Version in Adaptive Planning.

- This version will be copied and archived for reference.

- Division Directors review all budgets of PPGs under their division and adjust directly in Current Version.

- When Division Directors complete review, Finance will have collaborative conversations with Division Directors and review budget and adjust as needed.

- Once the Fiscal Year is complete, the NRC operating budget is complete; remaining balances are **not** carried forward to the next Fiscal Year.

The instructions below are for PPG managers and Division Heads to review and edit the budget.

Access Adaptive Planning using the worklet in Workday:

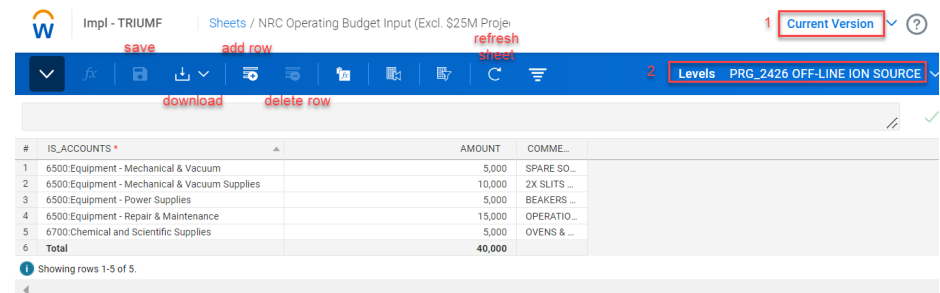- Click on the Workday logo in the upper left of the screen and choose **Sheets.**

- Choose **NRC Operating Budget Input (Excl. $25M Projects)**
  Note: If you cannot see the NRC Operating Budget Input sheet, please ensure that 1. You are in Current Version (top right) 2. You choose the appropriate NRC operating PPG using the "Levels" selector at the right side of the blue toolbar. The following screen will display:
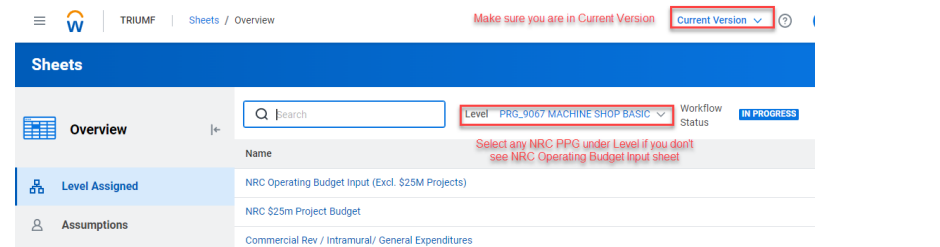
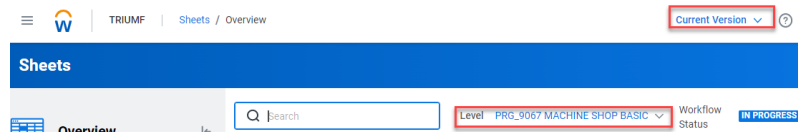

- The Budget Input sheet will then display:

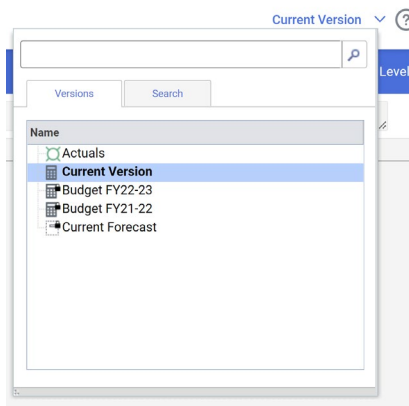# Adaptive Planning: NRC Operating Budget Input Sheet

Note: The FY2022-23 budget has been pre-loaded, which can be used as a starting point for the new fiscal year's budget input.

1. Ensure that you are in the **Current Version**.

   If you wish to look at a previous year's budget, select the version by clicking the drop down. (Currently Budget Y22-23 is available in Adaptive)


2. Using the Levels dropdown list on the right side of the blue toolbar, use the arrow key to select the appropriate PPG from the list for inputting your budget. What you see on this list depends on your access level.
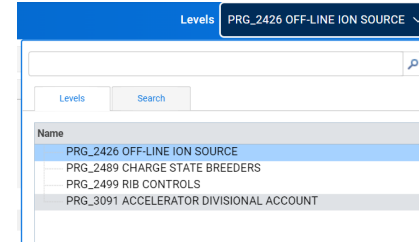
Note: The sheet display will change to reflect the level you have chosen. Click Levels and choose the level you wish to review and budget. Non-NRC PPG or $25m projects will be greyed out as this sheet is used for entering NRC operating budget only.

3. NRC PPG Managers should review and adjust the Spend category, budget amount and comments/line descriptions as needed.

   To change Spend category, click the triangle or drop-down and select other spend category as appropriate. To change budget amount or comments/line descriptions, double click the cell. Once completed, click **Save**.
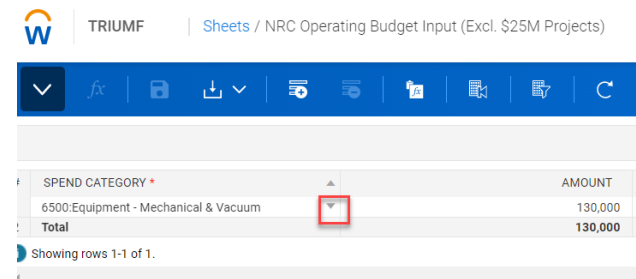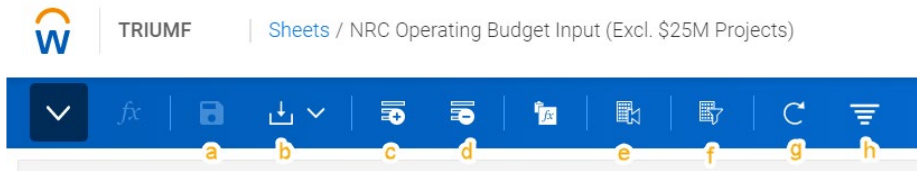

4. NRC PPG Managers can use the '**NRC Operating Expenditures (PPG Managers)**' Report to review the budget input, budget of current year, and year-to-date spend.

5. Options on the blue Toolbar at the top of the screen are:

a. Save: ensure you save your work **regularly**

b. Download / Printable View:

    i. Download (as an Excel spreadsheet)

    ii. Printable View (downloads as an Excel spreadsheet ready to print)

c. Add Row

d. Delete Row

e. Reset to Default view

**f.** Display Options: gives you the option of choosing what to see (columns, comparison type, value)
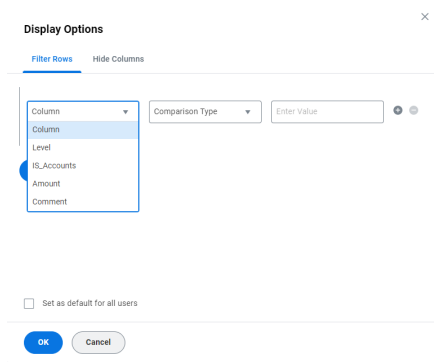
g. Refresh Sheet: refreshes data from the database. This is useful if others are making changes to the sheet simultaneously.

h. Filter: functions like Search. Type in words or numbers that you are looking for in the sheet.

 Note: Click the **Save** icon to save your data input and changes **regularly**.

Other functionality available:

- Right click on a cell. The following pop-up menu appears:
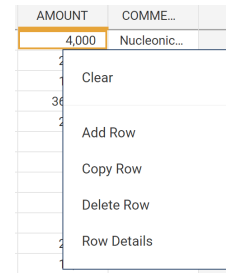
- Clear will delete the contents of the cell

- Add Row will add a row at the bottom of the sheet

- Delete Row will delete the row that the cursor is currently located within

- Row Details will display a pop-up window that indicates current level version and row, as well as account details for the fiscal period(s) selected

WHEN YOU HAVE COMPLETED YOUR CHANGES:

NRC PPG Managers will have approximately 4 weeks to complete their budget input; the date will be communicated by Finance.

If you have any questions, please contact:
- Log a [Helpdesk ticket](#) and choose the "Workday Adaptive" queue.
- For budget-specific questions, contact [Chloe Zhang](#), Finance Manager. Chloe is responsible for the NRC budget at TRIUMF.
- You can access job aids and training videos on Adaptive Planning and the budgeting process on the Finance site: https://www.triumf.ca/administration/accounting