



ADDY NOTES

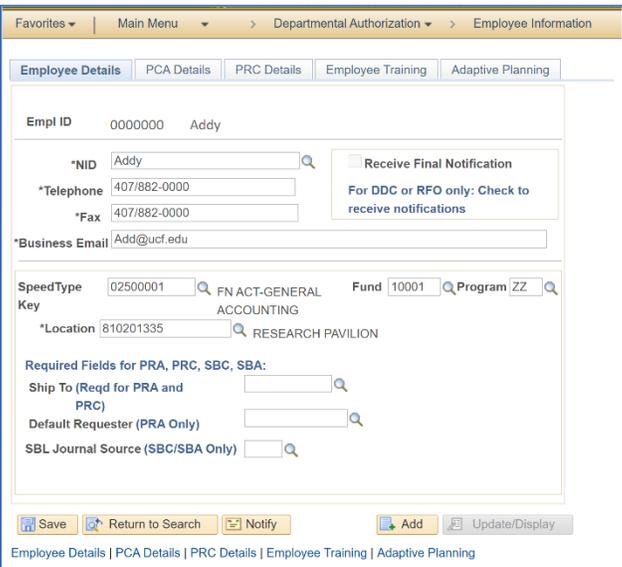


FINANCIALS

How to Request DAL Authorization to Access Workday Adaptive Planning

Before employees can access Workday Adaptive Planning (Adaptive), they must receive authorization through the Departmental Authorization List (DAL). Responsible fiscal officers (RFOs) or deans, directors, or chairs (DDCs) request the authorization for them.

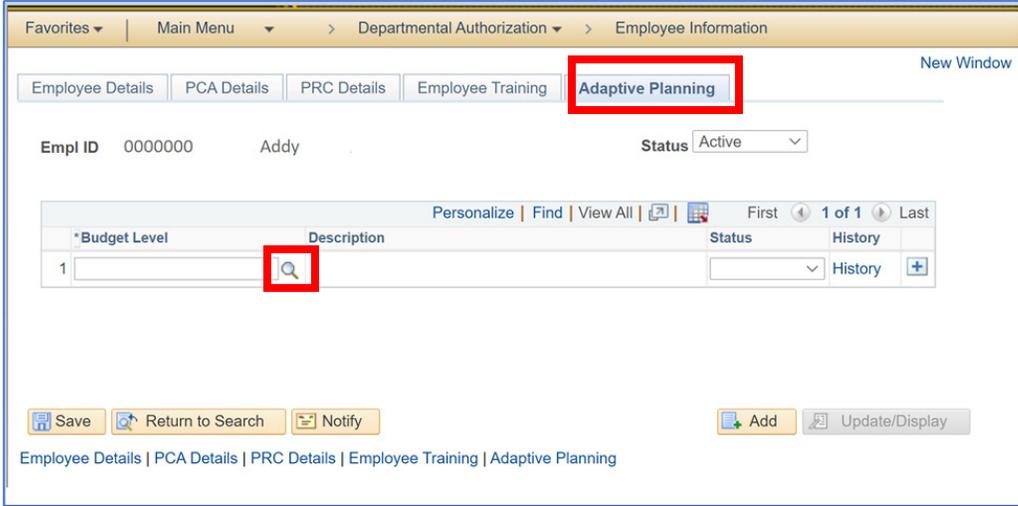
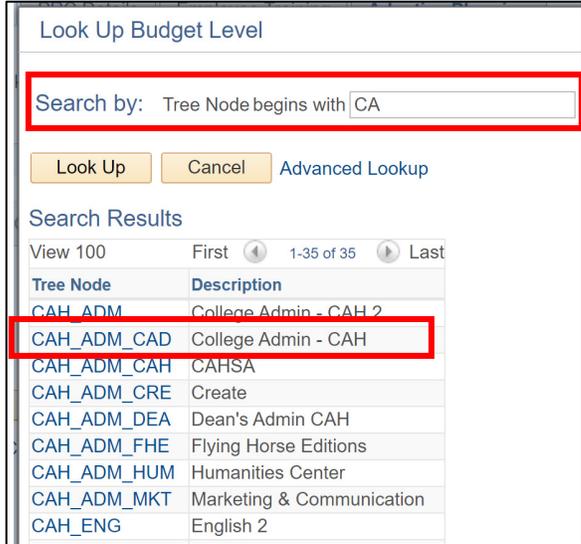
Note: Authorization to Workday Adaptive Planning does not provide access to UCF Financials.

Step	Action
1.	Determine the required budget level. If you are unsure what levels will be needed, refer to the online resource that lists budget levels https://financials.ucf.edu/helpful-resources-adaptive-planning-level-hierarchy-sbl/ .
2.	<p>On the DAL Navigate to Department Authorization > Employee Information. Ensure the Employee Details section is filled out with all required information.</p>  <p>The screenshot shows the 'Employee Information' page with the 'Employee Details' tab selected. Fields include: Empl ID (0000000 Addy), *NID (Addy), *Telephone (407/882-0000), *Fax (407/882-0000), *Business Email (Add@ucf.edu), SpeedType (02500001), FN ACT-GENERAL, Fund (10001), Program (ZZ), Key (ACCOUNTING), *Location (810201335 RESEARCH PAVILION). There are also checkboxes for 'Receive Final Notification', 'Ship To (Reqd for PRA and PRC)', 'Default Requester (PRA Only)', and 'SBL Journal Source (SBC/SBA Only)'. Buttons at the bottom include Save, Return to Search, Notify, Add, and Update/Display.</p>



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Step	Action
3.	<p>Select the Adaptive Planning tab and use the magnifying glass icon to select a Budget Level.</p> 
4.	<p>The Look Up Budget Level selection window displays. Enter search items in the Search by field and select the required budget level from the Tree Node list.</p> 



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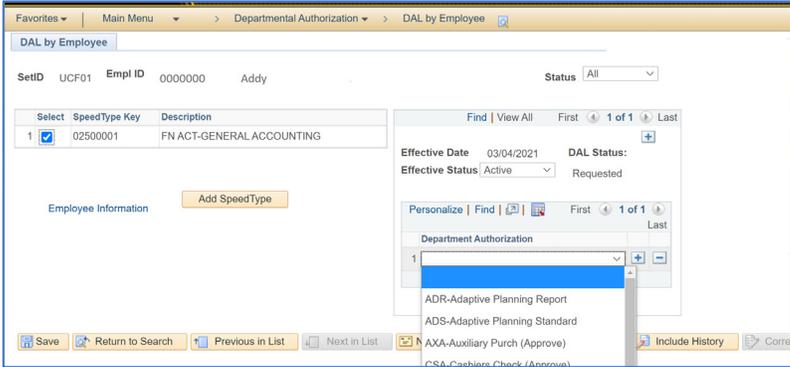
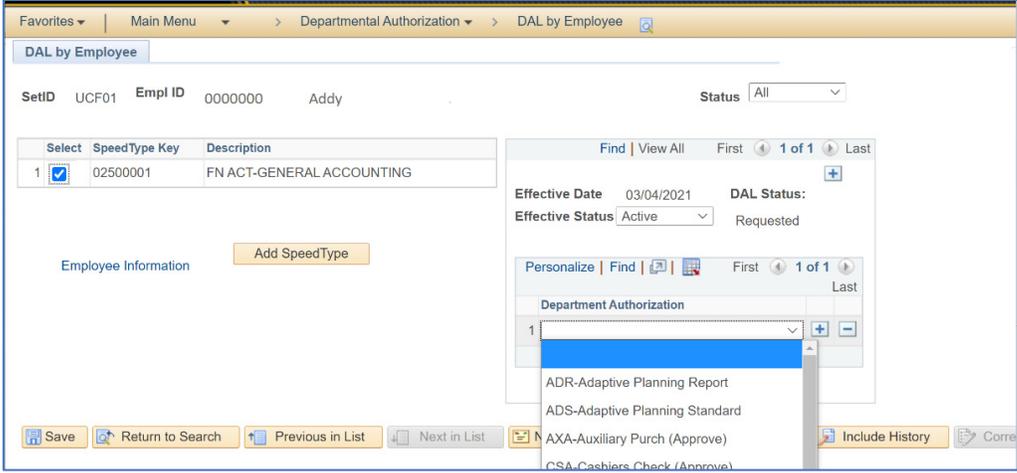
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Step	Action															
<p>5.</p>	<p>The selected level is added.</p> <p>To add an additional level, select the add line icon to add a Budget Level line. Repeat steps 3 and 4 to add the budget level. Repeat this process as needed.</p> <div data-bbox="277 642 1442 1010" style="border: 1px solid #ccc; padding: 10px;"> <table border="1"> <thead> <tr> <th colspan="2">*Budget Level</th> <th>Description</th> <th>Status</th> <th>History</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>CAH_ADM_CAD</td> <td>College Admin - CAH</td> <td>Active</td> <td>History</td> </tr> <tr> <td>2</td> <td>CAH_ADM_CAH</td> <td>CAHSA</td> <td>Active</td> <td>History</td> </tr> </tbody> </table> <p>Buttons: Save, Return to Search, Notify, Add, Update/Display</p> <p>Navigation: Employee Details PCA Details PRC Details Employee Training Adaptive Planning</p> </div>	*Budget Level		Description	Status	History	1	CAH_ADM_CAD	College Admin - CAH	Active	History	2	CAH_ADM_CAH	CAHSA	Active	History
*Budget Level		Description	Status	History												
1	CAH_ADM_CAD	College Admin - CAH	Active	History												
2	CAH_ADM_CAH	CAHSA	Active	History												
<p>6.</p>	<p>Select a DAL code:</p> <ul style="list-style-type: none"> • ADR: Reports Only • ADS: Standard <p>Navigate to <i>Department Authorization > DAL by Department</i> Or Navigate to <i>Department Authorization > DAL by Employee</i></p>															



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Step	Action
<p>7.</p>	<p>The DAL by Department or DAL by Employee tab displays. (The example below shows the DAL by Employee tab.)</p> 
<p>8.</p>	<p>Add a new effective dated row.</p> 



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Step	Action
<p>9.</p>	<p>Select the ADR or ADS option and click Save.</p> 