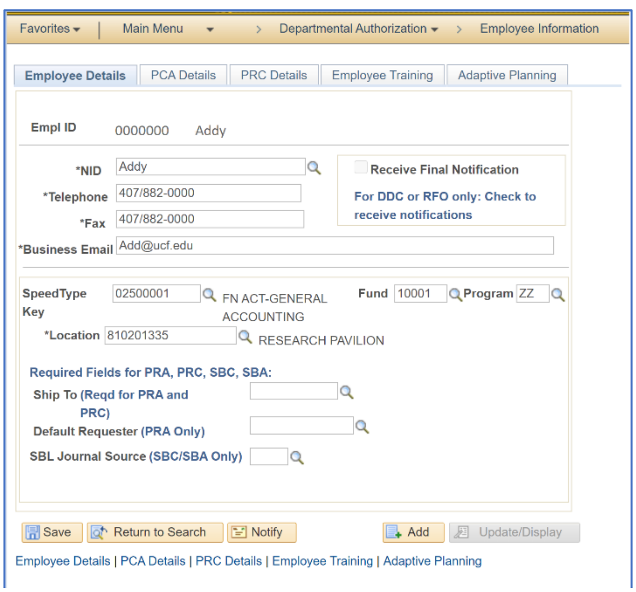
ADDY NOTES

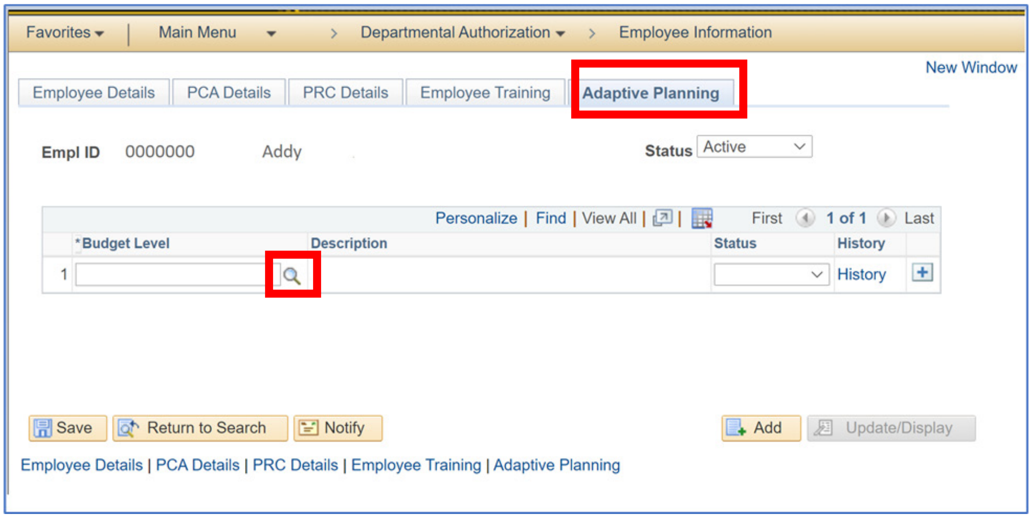
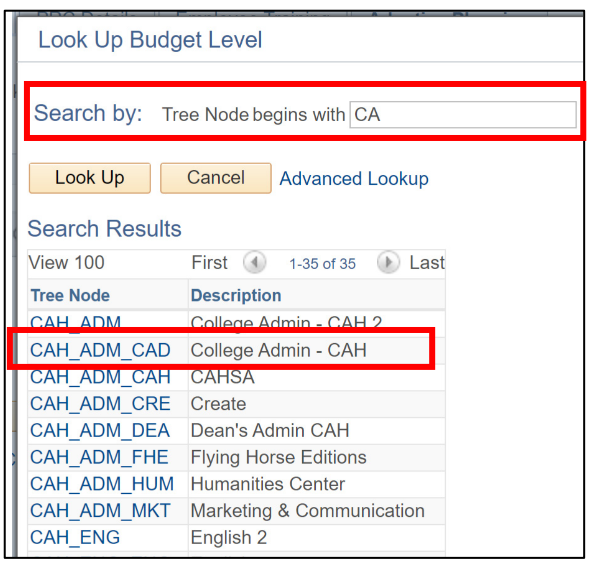
UCF FINANCIALS

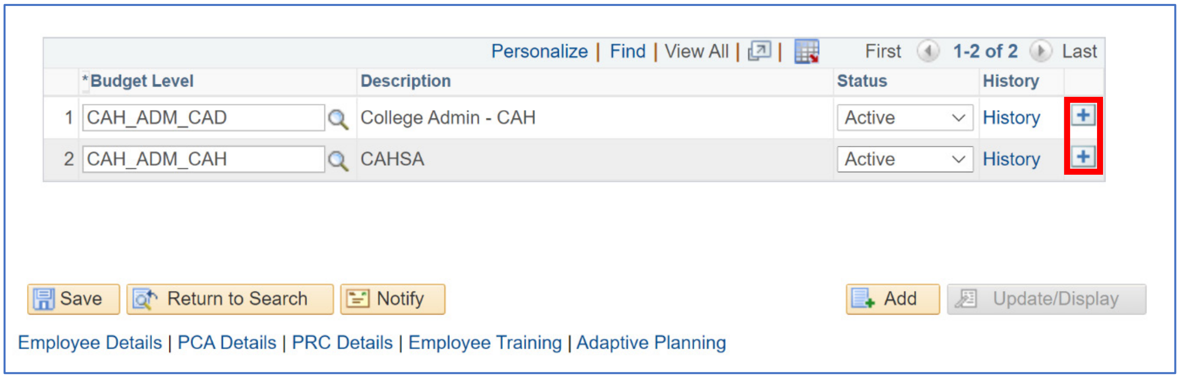
How to Request DAL Authorization to Access Workday Adaptive Planning

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.

<u>Note</u>: **Authorization to Workday Adaptive Planning does not provide access to UCF Financials.**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>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/.</td></tr>
<tr><td>2.</td><td>On the DAL Navigate to Department Authorization > Employee Information.
Ensure the Employee Details section is filled out with all required information.

</td></tr>
</table>

Step	Action
3.	Select the **Adaptive Planning** tab and use the **magnifying glass icon** to select a **Budget Level**. 
4.	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. 

Step	Action
5.	The selected level is added. 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. 
6.	Select a DAL code: • ADR: Reports Only • ADS: Standard **Navigate to *Department Authorization > DAL by Department*** Or **Navigate to *Department Authorization > DAL by Employee***

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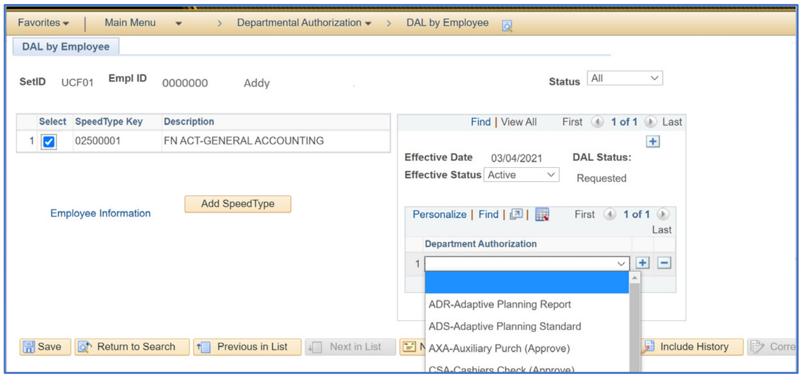
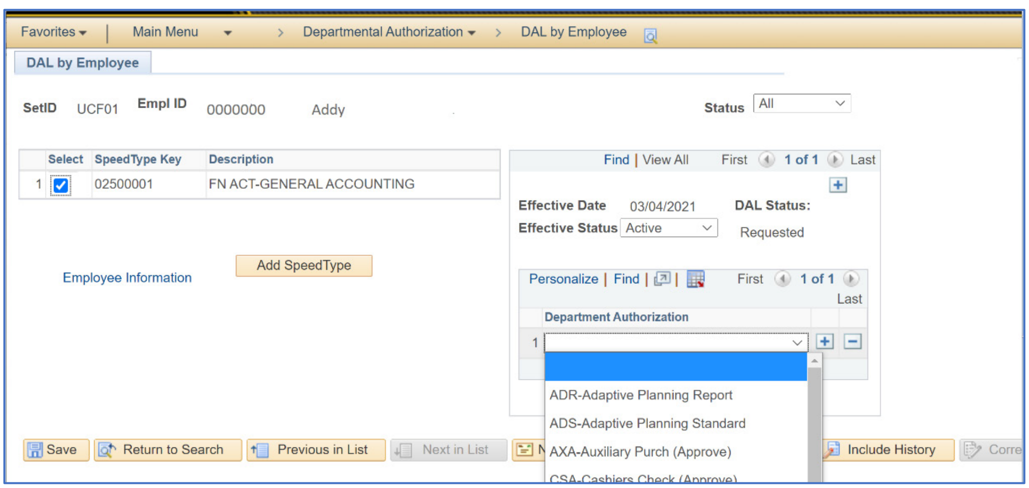
<tr><td>7.</td><td>The DAL by Department or DAL by Employee tab displays. (The example below shows the DAL by Employee tab.)

</td></tr>
<tr><td>8.</td><td>Add a new effective dated row.

</td></tr>
</table>

Step	Action
9.	Select the **ADR** or **ADS** option and click **Save**.