



ADDY TIPS



FINANCIALS

Understanding Adaptive Planning Levels in UCF Financials

This Addy Tip will explain best practices for responsible fiscal officers (RFOs) and dean, directors, and chairs (DDCs) as they determine the appropriate tree levels to select in UCF Financials when requesting an individual's security access in Workday Adaptive Planning (Adaptive).

When requesting security access to Adaptive, it is important to remember the following:

- ❖ **On the Employee Information/Adaptive Details tab, request Adaptive data level access equal to the employee's budget authority within your unit.**

Note: The only exception that would permit adding multiple rows is if there are gaps in budget authority at a specific level and, therefore, access cannot be granted at a single level.

- ❖ **On the Departmental Authorization List (DAL), only request one authorization code for each employee.** The ADS (Standard) code is a higher level of security access than ADR (Reporting). Both permit users to read reports. ADS provides access to additional functionality.
- ❖ **A DAL request does not need to be created for more than one department or project.** Unlike other DAL requests, the request process for the two new codes, ADR and ADS, authorizes access to the Adaptive application, not limited portions of it. Select any one department (perhaps the one with the highest number) and enter just one request there.
- ❖ **It is not currently possible to request ADR access for one set of departments and ADS for another.** The Adaptive access role is authorized per user (individual). The tree level you select for a user determines the level of data that person can access in the system.

To view the Adaptive tree levels, log into UCF Financials and navigate to the TREE VIEWER.

Download the complete Excel workbook file containing the Adaptive level structure at <https://financials.ucf.edu/helpful-resources-adaptive-planning-level-hierarchy-sbl/>.

