



# ADDY NOTE



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## ATTENTION:

This Addy Note is a procedural resource for the UCF Financials Reference Database, which only contains data prior to July 1, 2022.

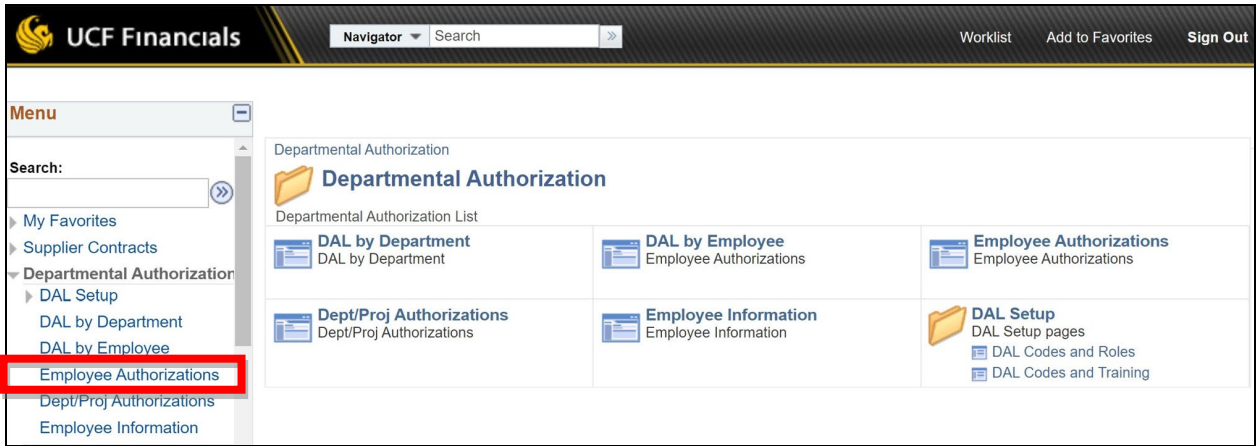
## Viewing Historical Employee Authorizations

This Addy Note explains how to:

- Use the Departmental Authorization List (DAL) to view an employee’s historical authorizations.
- Run a query to obtain a list of employees that were assigned to a department or a project and the departmental authorization codes that were assigned to the employees.
- Interpret DAL codes.

## Using the DAL to View Historical Authorizations

To view an employee’s authorizations on the DAL, you’ll need either the employee ID (EmplID) or the name of the employee on whom you are inquiring.

Step	Action
1.	<p>Navigate to: <b>Departmental Authorization &gt; Employee Authorizations.</b></p>  <p>The screenshot shows the UCF Financials interface. On the left is a 'Menu' sidebar with a search field and a list of items: My Favorites, Supplier Contracts, Departmental Authorization (expanded), DAL Setup, DAL by Department, DAL by Employee, Employee Authorizations (highlighted with a red box), Dept/Proj Authorizations, and Employee Information. The main content area shows 'Departmental Authorization' with a folder icon and a list of links: DAL by Department, DAL by Employee, Employee Authorizations, Dept/Proj Authorizations, Employee Information, and DAL Setup (with sub-links for DAL Codes and Roles, and DAL Codes and Training).</p>



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2.	<p>You can search for an employee’s authorizations using either the employee’s EmplID or last name.</p> <ul style="list-style-type: none"> <li>If you know the employee’s <b>EmplID</b>, click the drop-down arrow in the <b>Search by</b> field and select <b>EmplID</b>. Next, enter the first few digits of the <b>EmplID</b> and click <b>Search</b>. From the results that display, select the employee who is the focus of your inquiry.</li> </ul> <p>If you do not have the employee’s <b>EmplID</b>, click the drop-down arrow in the <b>Search by</b> field and select <b>Last Name</b>. Enter the last name of the employee and click <b>Search</b>. From the list of <b>EmplIDs</b> and <b>Last Names</b> that display, select the employee who is the focus of your inquiry.</p>																																				
3.	<p>The <b>DAL Authorizations</b> page will display with a list of the departments or projects associated with the employee and the employee’s corresponding delegated DAL/security access. You may click any of the column headings (Figure 1) to sort the results.</p> <ul style="list-style-type: none"> <li>The <b>SpeedType Key</b> and <b>Description</b> columns show the department or project number and provide a short description.</li> <li>The <b>Department Authorization</b> column lists the security access associated with a particular department or project.</li> <li>The <b>As of Date</b> refers to the date the access was granted.</li> </ul> <div data-bbox="284 1226 1258 1533" data-label="Table"> <table border="1"> <thead> <tr> <th>SpeedType Key</th> <th>Description</th> <th>Department Authorization</th> <th>As Of Date</th> </tr> </thead> <tbody> <tr> <td>1 02500001</td> <td>FN ACT-OPERATIONS</td> <td>AXA-Auxiliary Purch (Approve)</td> <td>02/05/2016</td> </tr> <tr> <td>2 02500001</td> <td>FN ACT-OPERATIONS</td> <td>CSA-Cashiers Check (Approve)</td> <td>02/05/2016</td> </tr> <tr> <td>3 02500001</td> <td>FN ACT-OPERATIONS</td> <td>DLP-DAL Processor</td> <td>02/05/2016</td> </tr> <tr> <td>4 02500001</td> <td>FN ACT-OPERATIONS</td> <td>JEC-GL Journal Create/Upload</td> <td>02/05/2016</td> </tr> <tr> <td>5 02500001</td> <td>FN ACT-OPERATIONS</td> <td>PCA-Purchasing Card (Approve)</td> <td>02/05/2016</td> </tr> <tr> <td>6 02500001</td> <td>FN ACT-OPERATIONS</td> <td>PRC-Purch Requisition (Create)</td> <td>02/05/2016</td> </tr> <tr> <td>7 02500201</td> <td>FN ACT-CONCESSION</td> <td>AXA-Auxiliary Purch (Approve)</td> <td>01/13/2017</td> </tr> <tr> <td>8 02500201</td> <td>FN ACT-CONCESSION</td> <td>CSA-Cashiers Check (Approve)</td> <td>01/13/2017</td> </tr> </tbody> </table> </div> <p><b>DAL Authorizations Page Column Headings</b></p>	SpeedType Key	Description	Department Authorization	As Of Date	1 02500001	FN ACT-OPERATIONS	AXA-Auxiliary Purch (Approve)	02/05/2016	2 02500001	FN ACT-OPERATIONS	CSA-Cashiers Check (Approve)	02/05/2016	3 02500001	FN ACT-OPERATIONS	DLP-DAL Processor	02/05/2016	4 02500001	FN ACT-OPERATIONS	JEC-GL Journal Create/Upload	02/05/2016	5 02500001	FN ACT-OPERATIONS	PCA-Purchasing Card (Approve)	02/05/2016	6 02500001	FN ACT-OPERATIONS	PRC-Purch Requisition (Create)	02/05/2016	7 02500201	FN ACT-CONCESSION	AXA-Auxiliary Purch (Approve)	01/13/2017	8 02500201	FN ACT-CONCESSION	CSA-Cashiers Check (Approve)	01/13/2017
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Figure 1.



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## Running a Query for Historical Authorizations

The steps below explain how to run a query to obtain a list of employees assigned to a department or project. This public query will provide each employee's name, his or her UserID, the SpeedType, a short description of the SpeedType, and the departmental authorization code assigned to the employee. Only active employees will be included on the list.

1.	After logging in to UCF Financials, navigate to: <b>Reporting Tools &gt; Query &gt; Query Viewer</b> . The <b>Query Viewer</b> page will display (Figure 2).
2.	If <b>Query Name</b> did not default in the <b>Search By</b> field, click the drop-down menu, and select it.
3.	Enter in the <b>begins with</b> field.
4.	Click the <b>Search</b> button to display a list of search results
5.	Click the <b>Run to Excel</b> link.

**Query Viewer**

Enter any information you have and click Search. Leave fields blank for a list of all values.

\*Search By  begins with

[Advanced Search](#)

**Search Results**

\*Folder View

Query		Personalize	Find	View All	First	1 of 1	Last		
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
FX_GL_DAL_BY_AUTH_DEPT_PROJ	Auth Code by Dept/Proj	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

Figure 2. Query Viewer Page



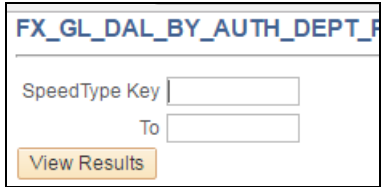
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6.	<p>In the new window that opens, enter the SpeedType for the department or project in the From Dept/Proj and To fields, as shown in Figure 3.</p>  <p><b>Figure 3. SpeedType Entry Fields</b></p>
7.	Click <b>View Results</b> .
8.	Respond to the <b>File Download</b> dialog box that displays by clicking the <b>Save</b> button.
9.	In the <b>Save As</b> dialog box, enter a file name for your document in the <b>File name</b> field, and click the <b>Save</b> button.
10.	When the <b>Download complete</b> dialog box appears, click the <b>Open</b> button.

## Interpreting the DAL Codes

Use the information in Table 1 on the next page to interpret the DAL/security access granted to an employee.



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Table 1. DAL Codes and Descriptions

Code	Description
ADR – Adaptive Planning Phase 1	Access to view reports
ADS – Adaptive Planning Phase 1	Access to create and update budget sheets
AXA – Auxiliary Purchases (Approve)	Individual is authorized to purchase or approve the purchase of items in any Auxiliary store location on campus (e.g. Computer Store, Printing Services, and Office Supply).
CSA – Cashiers/ Checks (Approve)	Individual is authorized to receive or approve the receipt of checks or travel advances for departments from Finance & Accounting or the Cashiers Office.
*DDC – Deans, Directors, and Chairs	Individual appointed to oversee the work of a department or project.
DLP – DAL Processor	Individual is responsible for inputting DAL requests into UCF Financials on behalf of the Dean, Director, or Chair (DDC) or the Responsible Fiscal Officer (RFO).
FSI – Financials Security Inquiry	Individual is granted access to view screens and run queries in the UCF Financials system: Vendor, Voucher, Requisition, Purchase Order, General Ledger and Budget Inquiry, and Asset acquisition inventory information.
PCA – Purchasing Card (Approve)	Individual is authorized to approve Purchasing Card transactions in UCF Financials.
*PCT – Property Custodian	Individual is appointed by the department’s RFO to assist in tracking and maintaining the department’s inventory of decaded furniture and equipment.
PRA – Purchasing – Requisitions (Approve)	Individual is authorized to approve requisitions in UCF Financials.



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Code	Description
PRC – Purchasing - Requisitions (Create)	Individual is authorized to create requisitions in UCF Financials.
*RFO – Responsible Fiscal Officer	Individual is responsible for the financial activity and financial security access for a particular department or project.
SBA – Standard Budget Ledger	Approver
SBC – Standard Budget Ledger	Creator

\*This code can only be assigned to one employee per department or project.