**Budget Security Notes:**

**Workday Budget Access:**

Two security roles are available in Workday:

**Planner** **– Approver** (with access to enter budget and run reports) or **Data Consumer** (with access to run reports)

Workday Planner access also includes the ability to make mid-year adjustments to the current year budget. Columbia will open for mid-year adjustments July-September.

‘LRP’ access is only for campus budget officers.

If you are removing all access, please check, ‘SALPLN reports’ and ‘Ad-hoc Report for Users Read Only’ to indicate the user will no longer need to run any reports in Cognos as well.

**Cognos Report Access:**

**‘SALPLN Reports’** provides access to the canned SALPLN reports in Cognos under the ‘Budget and Planning’ folder. This access will automatically be given if requesting Workday planner access. Users can request Cognos report access without having Workday access.

**‘Ad-hoc Report for Users Read Only’** provides access to all of the reports under the ‘Ad-hoc Reports for Users’ folder nested under the ‘Budget and Planning’ folder. This access will automatically be given if requesting the Workday planner access. Users can request Cognos report access without having Workday access.

By checking **‘Ad-Hoc Query Write’** it will request a license to Query Studio and Reports Studio in Cognos for the user to create their own queries. This license will give the user access to three packages to create queries: BudPln\_FIN, BudPln\_SAL and Journal Ledger.

**Planning & Budget Security Request Form**

E-mail completed form to: MU Budget *(BudgetOffice@missouri.edu)*

Date Requested: Click to enter a date.

Requested by: Click here to enter the name of the person completing this form.

**(By entering your name here, you are taking responsibility for ensuring proper training of user.)**

**Access requested for:** (please use Outlook Address Book for user properties)

**User’s Name:** (Jane Smith, J. Jonah Jameson) Click here to enter user’s first and last name.

**SSOID:** (smithja, jj3js63) Click here to enter SSOID.
**Email:** (e.g. smithja@umsystem.edu) Click here to enter Email.

**Device Name:** (e.g. Doit-LSB-JJJ)Click here to enter Device Name.
*Right-click Start > System > Device Specifications > Full Device Name, e.g. DoIT-LSB-JJJ.col.missouri.edu.
Workday Planning User ID will be* *ssoid@umsystem.edu**.*

**PeopleSoft Budget Access**

**CCM Change User:** Choose an option (Add/Remove). **Employee ID:** Click here to enter Employee ID.

**Level Access:** *VCVP or CSD, (e.g. CADM, CMED)*

**Level Nodes:** Click here to enter Level nodes.

**Workday Adaptive Planning Access**

**Action:**  Choose an option (New/Modify/Remove). **User Type (Permission Set):** Indicate User Type or No Change.

**Level Access:**

*Sub-Department or higher, e.g. CMED, CHISTORY). Child-levels are automatically included (e.g. CSD CMED includes all Departments in CMED):*

**Add Level Nodes:** Click here to enter Level nodes.

**Remove Level Nodes (Existing User):** Click here to enter Level nodes.

**Additional Version Access:**

*Data Consumers get Access to Actuals, Budget Original, and Budget Current by default; Planners get access to Actuals, Budget Working, and Budget Original by default. Any versions not included by default must be requested here.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Add** | **Remove Version** | **Add** | **Remove Version** |
|  |[ ]  [ ]  **Budget Working** |[ ]  [ ]  **Commitments** |
|  |[ ]  [ ]  **Budget Current** |  |  |
|  |  |  |  |  |

**Cognos Budget and Planning Report Access**

(Cognos Reports availability after WDAP go-live To Be Determined)

*Cognos FIN Reports are open to all users automatically*

[ ]  **SALPLN Reports** [ ]  **Ad-hoc for users read-only** [ ]  **Ad-hoc Write**

 Comments: Click or tap here to enter text.