

Adaptive Planning Job Aid – Roles and Permissions

Each user in Adaptive will be granted one of the three roles listed below (*with the exception noted at the bottom of this job aid). Most users will fall into one of the two Contributor roles, with the main distinction for budgeting purposes being that a contributor **without** approval access can *submit* budgets, whereas a contributor **with** approval access can *approve* submissions or can also *submit* themselves. The workflow in Adaptive functions from bottom up, thus a contributor without approval access for ORG12345 can submit that Org's budget to a contributor with approval access for the same Org for approval; once numerous Orgs are approved, the contributor with approval access can then submit the parent level for approval to the next level up (e.g., Dean or VP level). If no one is assigned an approval role at an upper level, the notification will go to the Budget Office. For reporting purposes, access between these two roles is virtually identical. The **View Only** role allows to only view reports and data. The user cannot make any inputs/edits to the data.

Access should be requested through a user's Dean's office, or through the unit's primary budget manager.

Users requesting access to Adaptive will provide to the Budget Office:

- Employee Name
- OU Email Address
- Emplid
- List of Orgs to be accessed
- User Role

The Budget Office will run queries in PeopleSoft to ensure Org access is the same. Email addresses are only needed to assign a username in the system, but are not necessary to sign in, as users will sign on from the single sign on link with OU credentials. The User will be notified by the Budget Office once access is granted.

Adaptive Roles and Permissions

Contributor w/ Approval Access	Contributor w/o Approval Access	View Only
Access Sheets	Access Sheets	Access Sheets
Access Reports	Access Reports	Access Reports
Access Salary Detail	Access Salary Detail	Access Salary Detail
Edit Data in Sheets	Edit Data in Sheets	Email Reports
Import Capabilities	Import Capabilities	Access Transactions
Privileged Actuals Access	Privileged Actuals Access	Access Dashboards
Export Capabilities	Export Capabilities	
Email Reports	Email Reports	
Access Transactions	Access Transactions	
Upload Files	Upload Files	
Access Dashboards	Access Dashboards	
Erase Actuals	Erase Actuals	
Access Process Tracker	Access Process Tracker	
Access OfficeConnect	Access OfficeConnect	
Import To All Locations	Import To All Locations	
Approve Levels	Submit Levels	

*In some isolated cases, a Report Only role will be granted to users who would like to track expenses and budget remaining for a specific chartfield spread in Adaptive, but does not need the ability to run any reports themselves or access any other users' or Orgs' data; the report has to be generated by a user with one of the roles above, and then the report has to be shared.