**Planning & Budget Security Request Form**

E-mail completed form to: [UM Budget Special Requests](mailto:umbudgetspecialreq@umsystem.edu)

Date Requested: Click to enter a date.

Requested by: Click here to enter your name.

**(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 Name:** Click here to enter User Name.

**SSOID:** Click here to enter SSOID. **Email:** Click here to enter Email.

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

**PeopleSoft Budget Access**

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

*Note to PARS Requester and CBO: Please use PS Access Request System to request CCM Change User Role for budget user and Business Unit wide access should be granted in PeopleSoft.*

**Workday Adaptive Planning Access**

**Action:**  Choose an option (New/Modify/Remove). **User Type (Permission Set):** Choose a User Type.

**Level Access:**

*Sub-Department or higher, e.g. CMED, CHISTORY). Data Consumers get read-only access to all levels. 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 Budget 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** |  | **Budget Core (S&T/UMSL)** |
|  |  | **Budget Original** |  | **Commitments** |
|  |  | **Budget Current** |  | **LRP (All Versions)** |

**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.