

Workday FIN Security Frequently Asked Questions

➤ What are Security Roles in Workday?

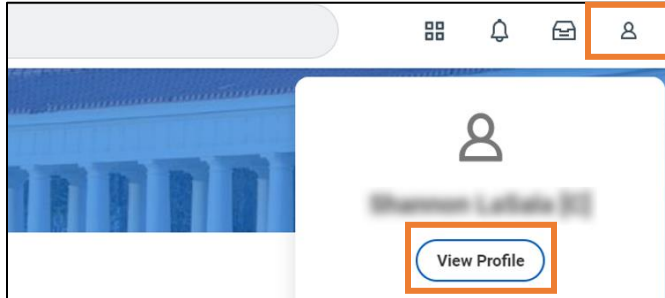
Workday's security framework enables what a user can see and do within Workday. Security Roles are not job titles, but determine what secured content, workers or transactions, and specific items or values, users can access. Employees can have **multiple** security roles based off the University and Business Unit needs. All employees have the "Employee as Self" security role, which allow them to initiate self-service transactions such as **Create Expense Report** and **Create & Assign a Cart**. To learn more about security roles and what you can access in Workday, check out the [Day in the Life Security Role Summaries PDF](#). This document provides descriptions of what tasks each security role can carry out, as well as the recommended and required training needed for each role.

➤ How can I view my security role(s) or others in Workday?

On the **Workday Home** page:

To view your security roles in Workday:

1. Select your **Profile** icon on the Workday Toolbar at the top of the screen.
2. Click **View Profile**.



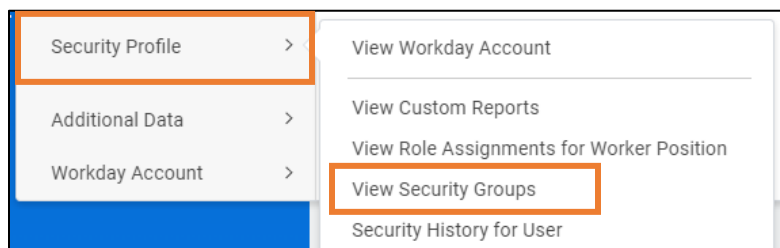
OR

To view an employee's security roles in Workday:

1. Search the **name of the employee** in the Workday search bar.
2. Select the **employee** from the search results.

On the **Profile** screen:

3. Click the **Actions** button underneath you or the employee's name.
4. In the Actions menu, select **Security Profile** > **View Security Groups**.



You will now see a table with all the security groups you or the employee belongs to. You can select the page number at the bottom of the table to navigate to the next page.

➤ **I manage an activity, but I am not authorized to see it in Workday. Am I assigned to the right cost-center security level?**

You can view your Cost Center and Cost Center Hierarchy to verify you are assigned to the right cost-center security level in Workday.

To view your cost center and cost center hierarchy in Workday:

1. Select your **Profile** icon on the Workday Toolbar at the top of the screen.
2. Click **View Profile**.

On the **Profile** screen:

3. Click **Overview** then select the **Organizations** tab.
4. A table will display with the organizations you are a member of. Locate **Cost Center** and **Cost Center Hierarchy** in the Organization Type column to view your assigned cost center and cost center hierarchy.

Organization	Organization Type	Organization Subtype
UVA Banking Hierarchy	Company Hierarchy	Company
CC0498 FI-VP Finance	Cost Center	Cost Center
CHC0065 Finance	Cost Center Hierarchy	Activity Center
CH10156 FI-VP Finance	Cost Center Hierarchy	Sub-Department (Level 1)

You can now validate if you are assigned to the correct cost center security level in Workday. If you believe this needs to be updated, or if you need access to see this activity in Workday, refer to the *I need a security role that I do not have. How do I obtain access?* question.

➤ **I cannot see/run a certain task or report in Workday. How do I proceed?**

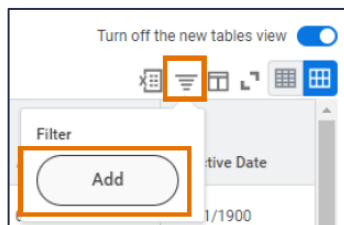
The tasks and reports you can see/run depend on your **assigned security role(s)**. If you cannot see or run a certain task or report in Workday, this means you currently **do not** hold this security role. Reach out to an employee who has this security role as they can carry out the task or run the report for you in Workday. If this is a security role you should have, refer to the *I need a security role that I do not have. How do I obtain access? question.*

➤ **I need a security role that I do not have. How do I obtain access?**

To request a new security role, this will need to be submitted via askfinance@virginia.edu by the **Senior Department Finance Approver**. This will create a Finance Solutions Center ticket that will be reviewed by the FST and/or WST Teams. Any requests received post go live will require training verification before provisioning. Only pre-go live security role assignments will hold the grace period for completing training.

➤ **I pulled a report in Workday and didn't get the intended results. How can I get the correct report?**

When running a report, ensure to use the report filters to your benefit. Filters can be used to hide any data you don't want to see and view information you only need from the report. From the report screen, click on the **Filter** icon and select **Add** to add customized filter parameter(s) to narrow down search results. You can also click on the column header to filter specific data. For further guidance on Workday Reporting, refer to the [Reporting Functionality in Workday QRG](#).



All employees can run reports, but certain reports you can access/view depend on your assigned security role(s). If filtering the report did not provide the data that you need, you may need to run another report. To view a list of reports that you can run, search **Can Run** in Workday search bar. If you are still running into issues on viewing a specific report, refer to the *I cannot see/run a certain task or report in Workday. How do I proceed? question.*

➤ **I used to do this task in Oracle, how do I do it now?**

There are numerous training related resources available to you on how to perform key tasks in Workday in the form of the **instructor-led training**, **self-paced courses**, and **training materials**. Visit the [Workday Finance Training page](#) for additional information on these training resources. This page also includes Quick Reference Guides (QRGs), which provide step-by-step guidance for various Workday transactions specific to each security role that you can use as reference when conducting tasks in Workday. Detailed instructions for how to register for instructor-led and self-paced training are outlined in the [Register for Workday FIN](#)

[Courses in Workday Learning QRG.](#)

- **I submitted my vendor invoice and now I can't find it. Where should I look? Is there a reason why I can't see it?**

If you are a Procurement Shopper who created a supplier invoice request for a vendor/non-employee, you can view your submitted transactions from the **Workday Inbox**. Select the **Archive** tab from your inbox to find the supplier invoice request details and status/process history. You can also search **My Supplier Invoice Requests** in the Workday search bar to view all your invoices. If you still cannot find the invoice, you may not have the Procurement Shopper role and can contact an employee with this role who may have helped you to submit the supplier invoice request for any details or status updates.

- **I plan to be out of the office and have an employee who can cover for me. Can I assign them my Workday security role in order for them to do tasks on my behalf?**

You **cannot** share your security role with other employees. You can delegate tasks to an employee to initiate on your behalf. **Delegations** are temporary reassignments of tasks to another person, enabling them to perform actions on your behalf and are typically used when an employee will be out of the office. The delegation may pertain to initiating processes, approving transactions, or delegating specific actions to someone. For instructions on how to delegate, refer to the [Delegate Workday Transactions QRG](#).

- **I submitted a task in Workday but it did not route to anyone/got stuck in the business process. How should I proceed?**

If your submitted task is stuck or not moving forward, you can view the **process history** from your Workday inbox to see which employee is reviewing it. Select the **Archive** tab from your inbox to find the task you submitted. From there, select the **Process** tab and view what step and who you are awaiting action from. You can then reach out to employee for an update on the business process status. If your submitted task is not routing to an employee, please contact the appropriate **business process administrators**.

- **I'm having trouble seeing what I usually can see in Workday. How do I proceed?**

You may not be able to see what you can usually view if you are not connected to **HSPVN**. To access and connect to HSPVN, review the following guidance below:

1. Open the Cisco AnyConnect Secure Mobility Client app on your laptop.
2. Select the dropdown menu to view available option.
3. If High Security VPN is not an option, instructions for requesting this access can be found on the [ITS HSPVN webpage](#).
4. As part of the approval process, users must complete [High Security Awareness Training \(HSAT\)](#).