

Workday System Access Request Overview

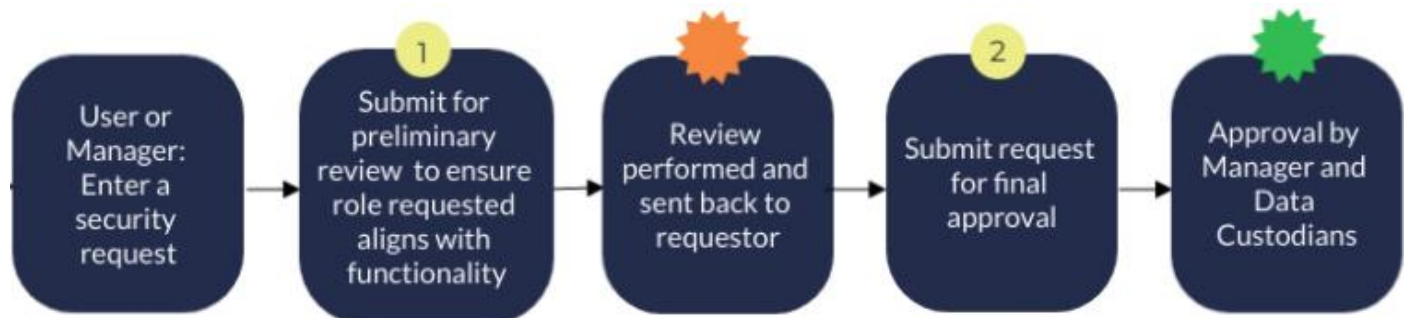
This Quick Reference Guide (QRG) is designed to walk employees through requesting security roles in Workday. Individuals or their managers can request various security roles in Workday by using a Workday dashboard app. Once a request is submitted, it will move through a business process for approval. Multiple role requests for an individual can be entered simultaneously. Consider reviewing the [HR List of Security Roles and Definitions](#) or the [Finance List of Security Roles and Definitions](#) prior to making a request.



Please ensure to fill out all fields (such as Action Need to Take, Role, Organization Type, and Organization) before submitting your security role request. These details are vital; failure to do so will result in your request being sent back to you. Once submitted, this will be under preliminary review and will be granted if it is approved by all reviewers.

HR Process:

Please note Steps 1 and 2 on the graphic below. Both steps must be completed by the requestor to gain a security role.



Finance Process:

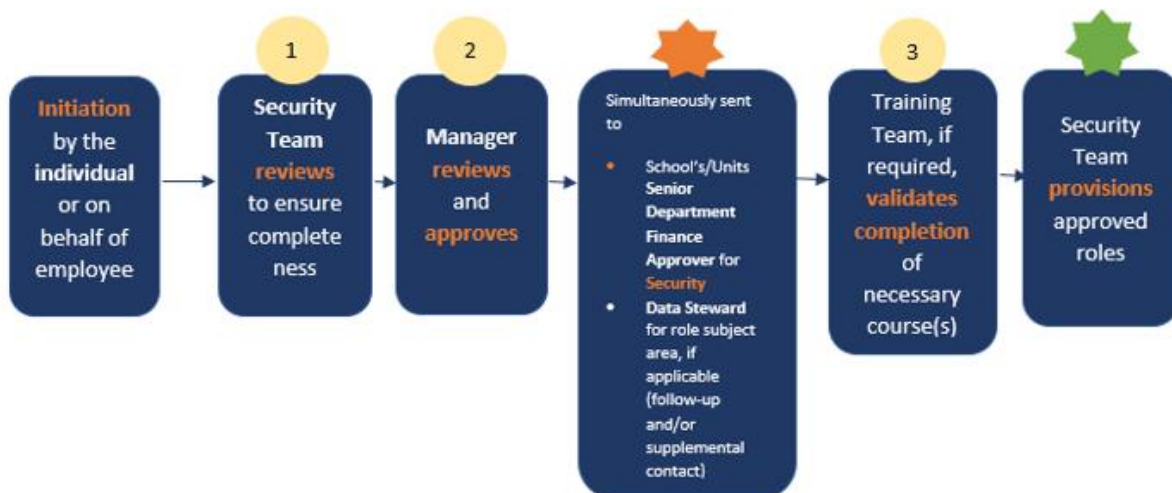


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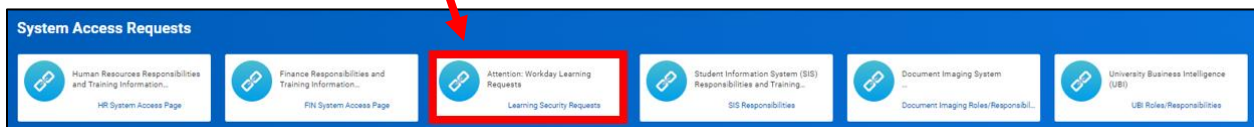
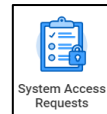
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Workday Learning Security Role Request

Workday Learning requests are managed in a separate process. There are two ways to initiate a Workday Learning security role request:

On the Workday **Home** screen:

1. Click the **System Access Request** app on the Learning Dashboard.
2. At the top of the page, click the **Learning Security Requests** card in the banner.



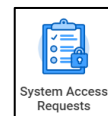
3. Complete the questionnaire and the Learning Team will respond with the training needed to obtain the role(s).

Enter a Security Role Request – Step 1

Managers can make request for their direct reports and individuals can submit requests for themselves. The manager will be asked to approve requests made by their direct reports. Please make sure to complete all fields before submitting.

On the **Workday Home** screen:

1. Click on the **System Access Requests** app.
2. Select the appropriate tab for the type of request you wish to submit. If it is an HR role, select the **HR Access Requests** tab. If it is a Finance role, select the **FIN Access Requests** tab.



Home	HR Access Requests	FIN Access Requests	SIS Access Requests	Document Imaging Access Requests	UBI Access Requests
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3. Click **Create New Request**.

Create New Request

4. **When is this request needed?** – Enter the desired date to obtain a security role. There is a 3-day process maximum due to multiple approval steps. If training is required to obtain the role, the timeframe for the request begins after training is completed.
5. **If requesting a new role** – Enter a date if there is a known termination date or a date the person will no longer need the role.

3

When is this request needed? *

MM/DD/YYYY

4

End Date, if applicable

MM/DD/YYYY

5

Who is this request for? *

☒ Myself

☐ Someone Else

6. **Who is this request for?** – Select an option.
- Myself** – HR will seek approval from the manager of the requestor.
 - Someone Else** – Can only be selected by managers. When selected, additional fields will display.
 - Active Worker** – Click in the field and select from the list of active, direct reports.
 - Open Position** – Use the open position field when there is a candidate who will be filling the position. Ensure the open position selected matches the position the candidate will be filling.

B. I & II

Active Worker

Open Position

7. **Please select the action you need to take.** Select **Add** to obtain a role, **Remove** if a role is no longer needed, and **Both** if a new role is needed while an existing role is no longer needed.

Part 1. Tell us What you Need to Do

8. **Please select what you need to do from the options below.** This field is a list of general roles, not specific role titles. Select from this list if the exact role title is unknown. Enter a comment in the text field at the bottom of the page to describe your needs.

If the role title is known, skip this field and use the table in item 9 below. Review the HR [List of Security Roles and Definitions](#) or Finance [List of Security Roles and Definitions](#) to understand if you know the exact role title.

9. **What Schools, Departments or Units do you support** – Enter the most specific information possible. Examples:
- Entire entity** – (all Medical Center or all Academic Division).
 - Entire management chain** - Enter the highest-level manager or supervisory organization name and add all subordinate orgs (Jane Doe, Parking and Transportation and all subordinate orgs).

- c. **Individual departments/units** - List the manager and/or supervisory organization name (Sandy Smith, Garage Maintenance Parking and Transportation).
10. **Provide the specific Security Role and Organization.** Click in the **Specific Role Requested** field and scroll to the role title.
 - a. Depending on the role selected, subsequent fields will open in either the **Organization Type**, **Organization** and **Supervisory Organization** columns.
 - **Organization Type** – Will self-populate.
 - **Organization** - Click in the field and type either **MC**, **UPG**, or **ACD** to filter to the organization. You can then scroll through the list of organizations or add part of the organization name to refine the search return.
 - **Supervisory Organization** – Search by manager name. Supervisory organizations with **JM** in the title are contingent workers for the supervisory organization.



Make sure to fill out the Security Role & Organization fields before submitting your security role request. These details are vital; failure to do so will result in your request being sent back to you. **Please Note:** When selecting the role field and organization type, it may take a few seconds for Workday to populate the additional fields that you will need to fill out (Organization Type & Organization).

11. Click the (+) icon to enter additional security role requests.

	Specific Role Requested	Organization Type	Organization	Supervisory Organization
+				
-				
-				

12. **Comments/Explanation** – If the field in **Step 7** is used, include a description that will assist Human Resources in identifying the appropriate role(s).
13. Read all instructions below the comment field.

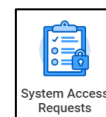
HR Only-Submit for Approval – Step 2

Once a request is submitted, it will route to Human Resources for review, and be returned to the requestor for approval or revisions. The requestor must complete the approval step and will not be notified when the approval step has been advanced to them.

The example below is of a request submitted by a manager for a direct report.

On the Workday **Home** screen:

1. Click the **System Access Request** app.
2. Any submitted requests will display in the Access Requests report.



System Access Requests

Create New Request

Access Requests

Initiated by	Subject (if not Initiator)	Request Date	Date Needed	End Date (if applicable)	Request Type	Preliminary Request	Preliminary Request Status	Request Business Process (click to view details)	Request Business Process Status	Request Resolution	Resolution Details
Manager Name	Employee Name	04/13/2021 11:07:49:00 AM	04/28/2021		Workday HCM Security	Submit for Approval	Review and Submit for Approval				

- Click the [Submit for Approval] button.
- Read the reviewer's comments in red font and all request details.
- Click **Submit for Approval**.

Submit for Approval
- If the request was submitted by an employee, it will route to their manager for approval. Once approved by the manager, and if no training is required, the request will take a maximum of three days to process.

[Roles that Require VPN Access](#)

[Roles that Require Training](#)

Roles That Require High Security VPN Access (HSVPN)

Several security roles require HSVPN access due to the sensitive data that is exposed to the requestor. Training is required to obtain HSVPN access. HSVPN is not managed by Human Resources and is a separate request must be submitted to the Identity Access Management (IAM) team in Information Technology Services (ITS).

Access the training in Workday Learning:

[https://www.myworkday.com/uva/d/inst/1\\$17188/17816\\$263.html](https://www.myworkday.com/uva/d/inst/1$17188/17816$263.html)

Submit request for HSVPN: https://virginia.service-now.com/its/?id=itsweb_kb_article&sys_id=9a5c088c6f59ee400a017f512e3ee4e2

- Board of Visitor (BOV) Reporting
- Employee Health Administrator
- GPO Administrator
- IAM User Access
- Provost Special Programs
- SOM Administrator

- UPG HR Analyst
- UPG HR Business Partner
- UPG Payroll Auditor

For the list of Finance security roles that need HSVPN, refer to page 5 in the [Workday FIN Security FAQ](#).

Roles That Require Training

There are roles that require that the requestor complete training prior to obtaining the role. If it is an HR role, the requestor will receive an email notification and Workday inbox task to complete an attestation that the training has been completed as part of the request process. For Finance roles, the training team will confirm and verify the training was completed before granting access to the role.

- Student Hiring Support Administrator course:
[https://www.myworkday.com/uva/d/inst/1\\$17188/17816\\$4063.html](https://www.myworkday.com/uva/d/inst/1$17188/17816$4063.html)
- Period Activity Pay Administrator course:
[https://www.myworkday.com/uva/d/inst/1\\$17188/17816\\$223.html](https://www.myworkday.com/uva/d/inst/1$17188/17816$223.html)

1. Check the I Agree box after completing the training.

All Finance training is available in Workday Learning in the form of web-based training (self-paced courses). To access these courses and additional training materials, refer to the [Workday Finance Training page](#).

Security Role List with Definitions


For HR roles, Human Resources provides lists of security roles by various categories or grouped by entity. After accessing the site below, scroll down and begin your review at the header **Security Roles Grouped by Category**. Click on the security role title to view what can be done with the role, VPN and training requirements, and if the role is applicable for specific entities.

<https://hr.virginia.edu/workday-request-based-access>

For Finance roles, you can access the [Finance Security Roles page](#), that contains the list of Finance security roles and if there is a required or recommended training needed.

What is the Status of My Request?

When a requestor completes Step 2 and submits the final approval for their security role, the progress of the request can be viewed in Workday.

1. Click in the **Workday Inbox**. 
2. Click on the **Archive** tab.
3. Tasks are listed chronologically. Scroll to and click the task with the title beginning with **Request Process**.
4. In the body of the task, click on the Process tab.
5. All the active steps in the process are listed with the first step at the top of the table and later steps at the bottom of the table. Each step displays the individuals who may be managing the specific step.
6. For subsequent steps, click **Remaining Process** below the table.

