

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 [Finance Security Roles page](#) and the [Day in the Life Security Role Summaries PDF](#). These resources provide 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) in Workday?

There are several ways you can explore what security role(s) you have in Workday:

1. If you belong to one of the permitted security groups, you can run the **View Security Groups for User** report.
2. Ask your Manager to view your security group(s) in Workday as they can run the Worker Roles Audit and/or Role Assignments for Worker position reports. **Worker Roles Audit** report is best used if the Manager wants to view all their employees' security roles at a glance while the **Role Assignments for Worker Position** report will display for one specific employee.
3. If both your Manager and you cannot view your security role(s) in Workday, email askfinance@virginia.edu for assistance.

To run the View Security Groups for User report in Workday:

On the **Workday Home** page:

1. Type "**View Security Groups for User**" and select the report in Workday search.
2. In the Person field, type your name and press enter.
3. Click **OK**.
4. You will now see a table with all the security groups you belong to. You can select the page number at the bottom of the table to navigate to the next page.

OR

As a Manager, to run the Worker Roles Audit report and view all your employees' security roles in Workday:

On the **Workday Home** page:

1. Type "**Worker Roles Audit**" and select the report in Workday search.
2. In the Organization field, type in your name and press enter in order to select your Supervisory Org. You can also type in your Cost Center. To view your Cost Center in Workday refer to the ***I manage an activity, but I am not authorized to see it in Workday. Am I assigned to the right cost-center security level? question.***

3. Click **OK**.
4. You will now see a table with all your employees' security groups in the **Roles** column.

As a Manager, to run the Role Assignments for Worker Position and view one of your employee's security roles in Workday:

On the **Workday Home** page:

1. Type "**Role Assignments for Worker Position**" and select the report in Workday search.
2. In the Worker field, select the My Team category and pick the employee you want to view their security group(s).
3. Click **OK**.
4. You will now see a table with the security groups listed in the **Assignable Role** column.

Assignable Role	Role Enabled Instance	Role From
Cost Center Fiscal Specialist	CC0253 CO-Economic Development	Assigned
Expense Support Specialist	CC0253 CO-Economic Development	Assigned

➤ **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)

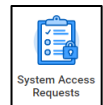
You can now validate if you are assigned to the correct cost center security level in Workday. If you believe this needs to be updated, or if you need access to see this activity in Workday, refer to the *I need a security role that I do not have. How do I obtain access?* question.

➤ 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, please use the **Workday System Access Requests** worklet to request security role additions or removals. This is the same tool used for HR and is integrated within the Workday system. For step-by-step guidance, refer to the [Workday System Access Request QRG](#).



Please Note: To be assigned a security role, you need to be set up in Workday as a contingent worker or employee. Please reach out to askHR for assistance.

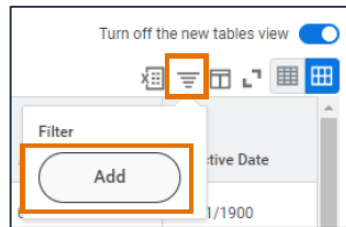
The following process is effective as of 7/25/22:

1. Security role request is initiated by the individual or on behalf of the employee (Manager). Please ensure to **fill out all fields** before submitting. It is vital to submit these details, or your request will be sent back.
2. Security Team reviews to ensure completeness.
3. Manager reviews and approves request.
4. The request is simultaneously sent to the School's/Unit's Senior Department Finance Approver for Security and the Data Steward for role subject area, if applicable (follow up and/or supplemental contact may also occur).
5. If training is required, Training Team validates completion of necessary courses. Any requests received post go live will require training verification before provisioning.
6. Security Team provisions approved roles.



➤ 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 **HSVPN**. 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 HSVPN webpage](#).
4. As part of the approval process, users must complete [High Security Awareness Training \(HSAT\)](#).

HSPVN requirements are driven by your security profile within Workday. If you have the Finance Reporting View role, you will not need HSVPN. See below the Workday Finance & Cross-functional roles that will need HSVPN:

Roles Need HSVPN	
1099 Analyst	Expense Partner
Accountant	Federal Work Study Specialist
Accountant – Central	Finance Payroll Information Viewer
Accountant - Financial Reporting	Gift Manager
Accounting Manager	Gift Manager Approver
Accounts Payable Analyst	Grants Compliance Reviewer
Accounts Payable Data Entry Specialist	Internal Service Provider Manager
Accounts Payable Manager	Lease Accounting Specialist
Accounts Payable Settlement Specialist	OSP Post-Award Director
Accounts Receivable Analyst	OSP Subaward Specialist
Accounts Receivable Specialist	Payroll Accounting Adjustment Specialist
Award Billing Specialist	Payroll Benefit Vendor Payment Processor
Award Contract Analyst (Company)	Payroll Costing Manager
Award Contract Specialist	Payroll Costing Specialist
Award Payment Specialist	Procurement Analyst
Bank Reconciliation Specialist	Procurement Director
Budget Manager	Recharge Center Approver
Business Asset Accountant	SFS Billing Specialist

Business Asset Director	SFS Contract Specialist
Business Asset Inventory Specialist	SFS Refund Viewer
Buyer	Sponsored Programs Manager
Buyer CC&R	Subaward Analyst
Buyer Manager	Supplier Contract Specialist
Capital Project Accountant	Supplier Partner
Cash Manager	Tax Manager
CC&R Manager	Wise Buyer
Company Financial Analyst	Expense Settlement Specialist
Controller	Investment Pool Manager
Customer Billing Specialist	Senior Buyer
Customer Contract Specialist	Account Certification Administrator
Customer Payment Specialist	Bank Administrator
Customer Refund Specialist	Business Process Administrator
Environmental Health and Safety	Business Process Analyst
Escheatment Specialist	Company Administrator
Costing Administrator	Report Administrator
Credit Card Administrator	Report Output Sharing
Customer Administrator	Report Writer
Drive Administrator	Safety Administrator
Expense Configurator	Sales Item Administrator
Finance Administrator	Services Coordinator
Finance Auditor	Settlement Administrator
Finance Integration Administrator	Report Administrator
Financial Accounting EIB Access - SH	Report Output Sharing
Financials Planning Administrator	Report Writer
Gift & Endowments - EIB Journals Access - SH	Safety Administrator
Grant Financial Analyst	Sales Item Administrator
Integration Administrator	Setup Administrator
Internal Service Provider Administrator	Sponsor Administrator
IT Project & Software Development Team	Sponsored Programs Manager (Cost Center)
Migration Administrator	Subrecipient Administrator
Organization Administrator	Supplier Administrator
Organization Partner	System Auditor
OSP Post-Award Grant Manager	Travel Administrator

OSP Pre-Award Grant Manager	UVA Accounting Setup Administrator
Owner	UVA Adoption Planning Administrator
Payroll Costing Administrator	UVA Audit Trail View
Prism Data Administrator	UVA Core Reporting Objects (UC)
Prism Data Writer	UVA Drive Access
Procurement Administrator	UVA Limited BP Administrator
Project Administrator	Worksheets Coordinator
Questionnaire Administrator	
REP-New Leader Report Recipient	