

# Access to the Workday SFTP Server

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1.0	02/25/2021	
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## Description

Departments and units can upload their transactions into Workday using file-based integrations such as Accounting Journals, ISPs, Supplier Invoices, Customer Invoices, etc. To load the transaction file, users will connect to the Workday SFTP server.

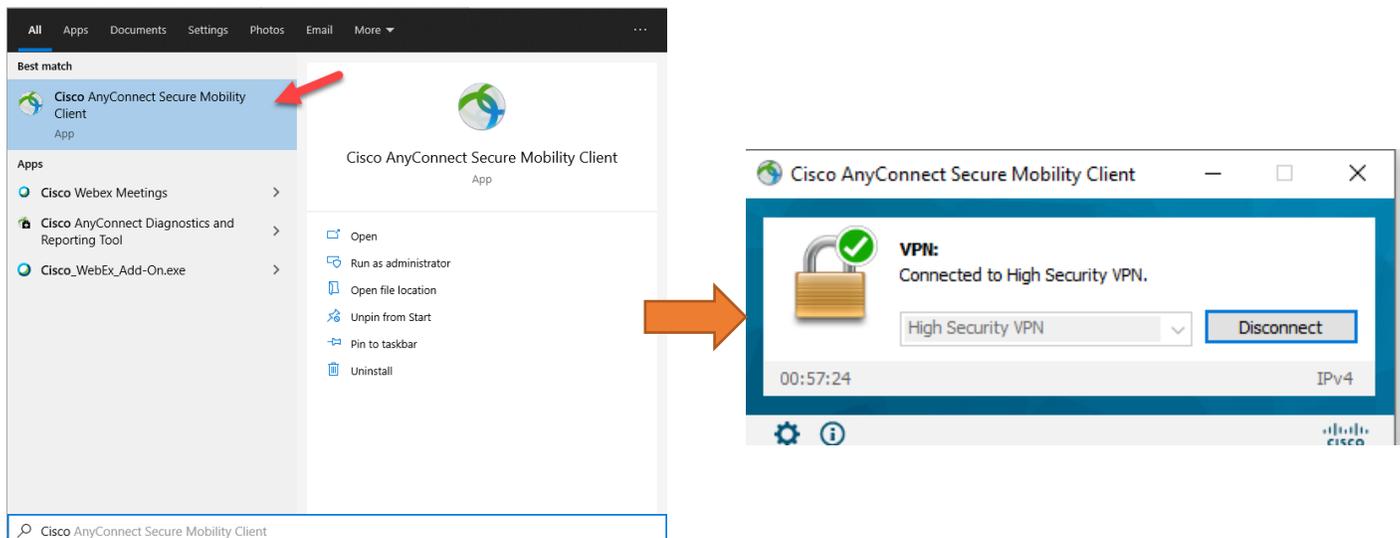
There are two methods to transfer files to the Workday SFTP server

1. Using secure file transfer client SecureFX – This can be used if the user wants to transfer files manually from an individual's computer.
2. Using Server to Server transfer – This method is used when the user wants to automate the transfer and use a server instead of an individual's computer

## Steps to connect to Workday SFTP server using SecureFX

### Step 1. Setup HSVPN

Check if you can connect to the HSVPN using the **Cisco AnyConnect Secure Mobility Client**. The VPN provides authorized users with secure, authenticated access to the UVA servers.



If you don't have this software installed on your computer and don't have access to VPN, use the following link to guide you on how to install and request access to HSVPN.

<https://in.virginia.edu/hsvpn>

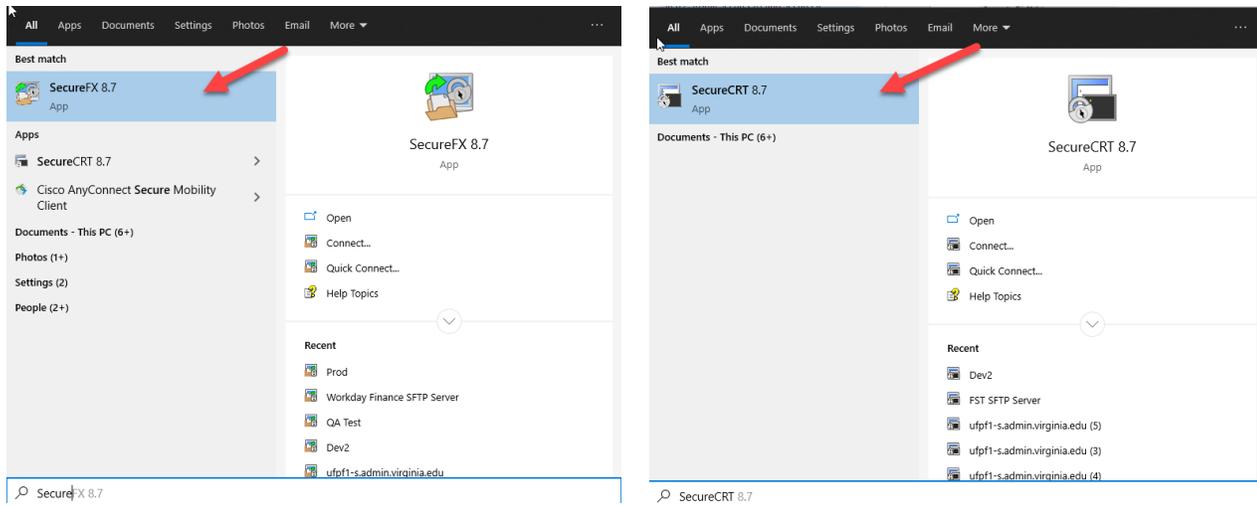
## Step 2. Install SecureCRT and SecureFX

Check if you have the SecureFX and SecureCRT installed on your computer. If you don't have one, see the installation instruction here –

<https://in.virginia.edu/securecrt>

<https://in.virginia.edu/securefx>

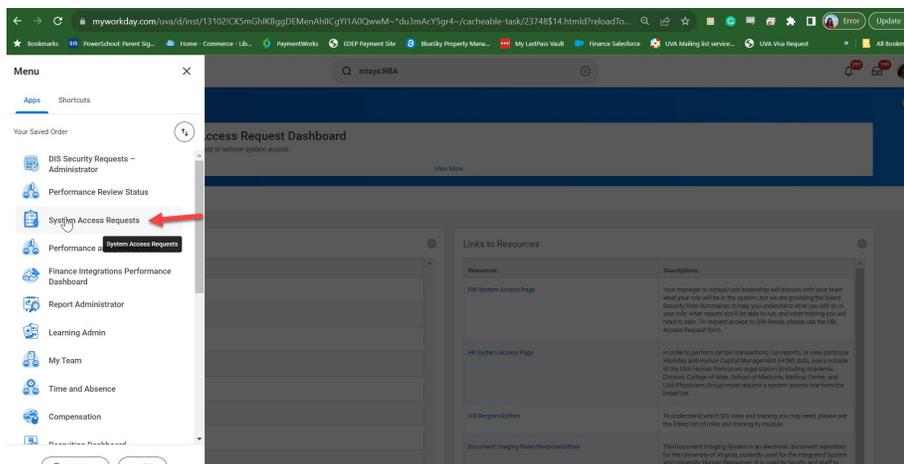
Install SecureFX and SecureCRT; Users will need the SecureCRT application to change the password.



## Step 3. Request Access to SFTP server

Users need to request access to the SFTP server through Workday App.

### Go to the **System Access Request**



### Select **SFTP Access Request**



## Welcome to the System Access Request Dashboard

Please click the appropriate links below to request or remove system access.

[View More](#)

[Home](#) [Reports](#)

### System Access Requests

Create new request or review previously submitted requests:

[FIN Access Requests](#)

[HR Access Requests](#)

[SIS Access Requests](#)

[Document Imaging Access Requests](#)

[UBI Access Requests](#)

[SFTP Access Requests](#)

[Learning Security Requests](#)

[ResearchUVA Access Requests](#)

[View More ...](#)

### Links to Resources

Resources:

[FIN System Access Page](#)

[HR System Access Page](#)

[SIS Responsibilities](#)

[Document Imaging Roles/Responsibilities](#)

[UBI Roles/Responsibilities](#)

Descriptions:

Your manager or school/unit leadership will discuss with your team what your role will be in the system, but we are providing the linked Security Role Summaries to help you understand what you will do in your role, what reports you'll be able to run, and what training you will need to take. To request access to Qlik Sense, please use the UBI Access Request form.

In order to perform certain transactions, run reports, or view particular Workday and Human Capital Management (HCM) data, users outside of the UVA Human Resources organization (including Academic Division, College of Wise, School of Medicine, Medical Center, and UVA Physicians Group) must request a system access role from the linked list.

To understand which SIS roles and training you may need, please see the linked list of roles and training by module.

The Document Imaging System is an electronic document repository for the University of Virginia, currently used for the Integrated System and University Human Resources. It is used by faculty and staff to access and review academic and business-related documents. Perspective Content (formerly ImageNow) is the content management and workflow suite behind the Document Imaging System at UVA.

UBI contains numerous modules containing various types of data. Use the linked guide to determine which role(s) you will need. Please use the UBI Access Requests page for access to Qlik Sense.

Select the specific area as **FIN** and Role as **UVA FIN File Access**

### Select Roles

Please enter the roles that you are requesting. Once you proceed to the next page you will not be able to add more roles to this request.

Effective Date

10/03/2023

1 item

Specific Subject Area Requested	Role
x FIN	x UVA FIN File Access

Please explain why you need this role and provide what actions you will be performing with this role.

Powered By Workday Extend

OK

Cancel

You can request access to Test or Prod or Both depending on your need.

### Step 4. Connect to the Server

After you get access to the Workday Finance SFTP folder, set up the SecureFX. Don't forget to change the password - Log in to the host via SecureCRT and change the initial default password

Instructions are included here - <https://in.virginia.edu/file-transfer>

## Session Options - Workday Finance SFTP Server



Category:

- Connection
  - SSH2
  - Advanced
- File Transfer
  - FTP/SFTP
  - Advanced

SSH2

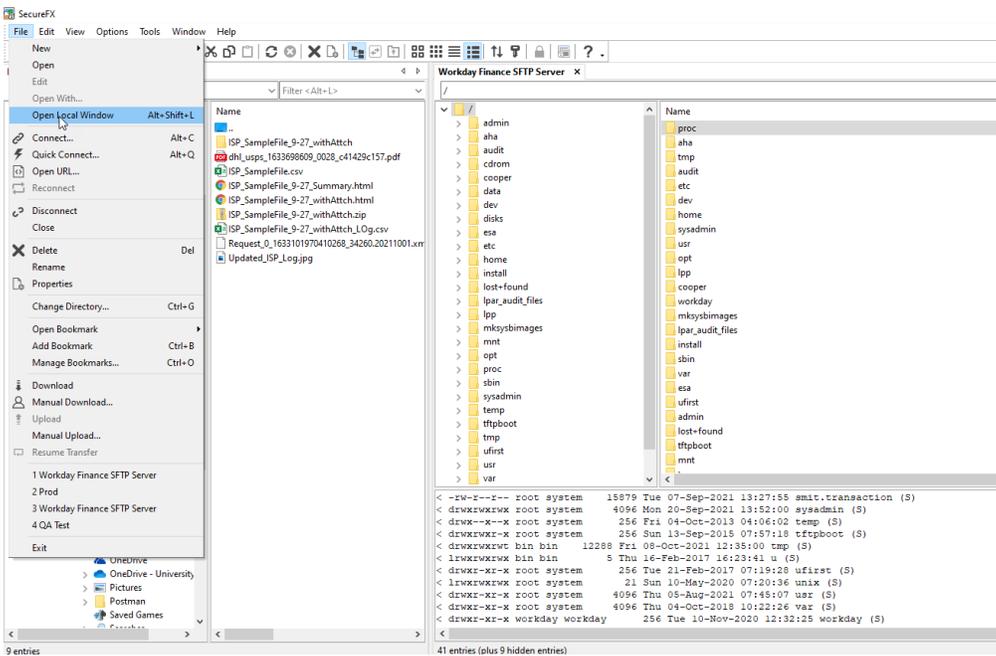
Hostname:

Port:

Firewall:

Username:

*Tip: Always keep the local window open to transfer files using drag and drop, File-> Open Local Window*



## IMPORTANT : Password Expiry

Note that the password expire every 52 weeks, with email reminders beforehand. To reset the password you will need to send email to [esystems@virginia.edu](mailto:esystems@virginia.edu) and they will reset the password for you.