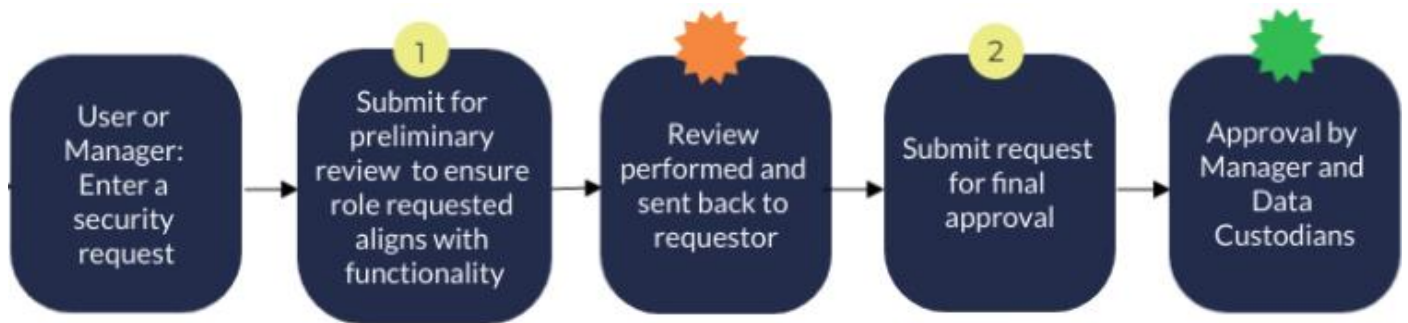**UVAFinance**

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.
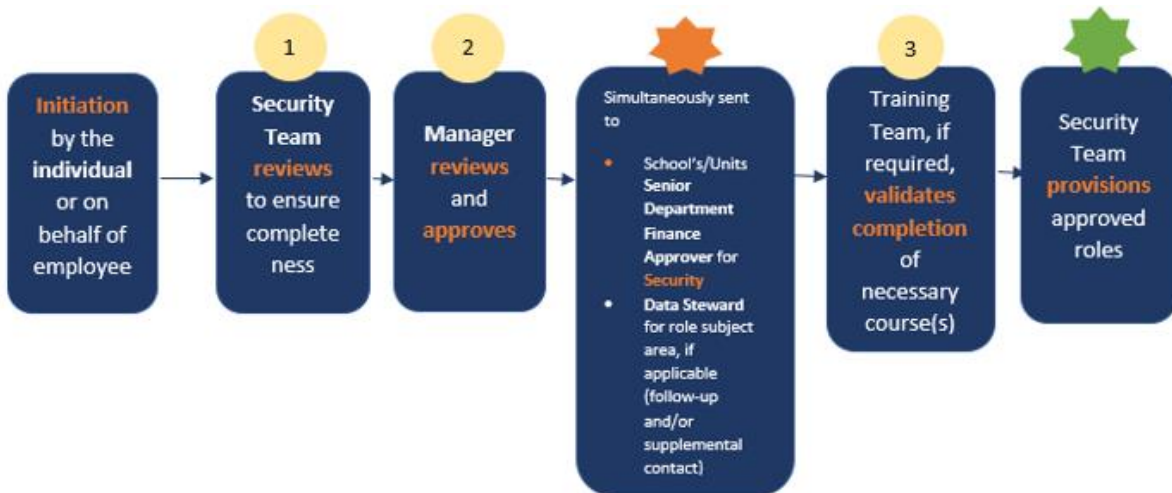
NOTE	**Please ensure to fill out all fields** (such as Action Need to Take, Role, Organization Type, and Organization) before submitting your security role request. These details are vital; failure to do so will result in your request being sent back to you. Once submitted, this will be under preliminary 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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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.
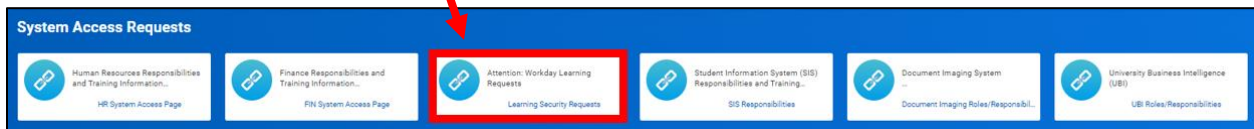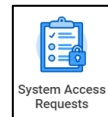
3. Complete the questionnaire and the Learning Team will respond with the training needed to obtain the role(s).

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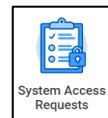
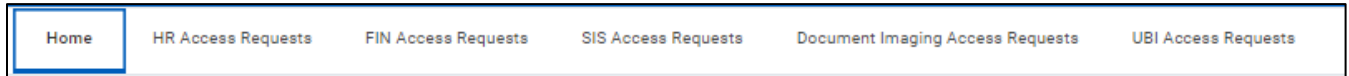2. Select the appropriate tab for the type of request you wish to submit. If it is an HR role, select the **HR Access Requests** tab. If it is a Finance role, select the **FIN Access Requests** tab.

Home	HR Access Requests	FIN Access Requests	SIS Access Requests	Document Imaging Access Requests	UBI Access Requests

3. Click **Create New Request.**

4. **When is this request needed?** – Enter the desired date to obtain a security role. This is typically a 4–5-day timeframe to process your request 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.

> **NOTE**
> If you or someone on your team is leaving and you need to transition the roles to someone else, please **do not wait until the last day of employment** to submit this request.
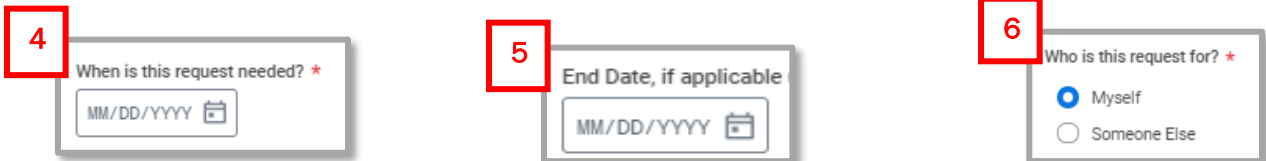
6. **Who is this request for?** – Select an option.
   a. **Myself** – HR will seek approval from the manager of the requestor.
   b. **Someone Else** – Can only be selected by managers. When selected, additional fields will display.
      i. **Active Worker** – Click in the field and select from the list of active, direct reports.
      ii. **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.

7. **Please select the action you need to take.** Select **Add** to obtain a role or **Remove** if a role is no longer needed. If you are **removing a role**, go to **Part 2. Select Security Roles** as the Part 1 section will not appear and is not applicable.

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 move on to step 9. 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:
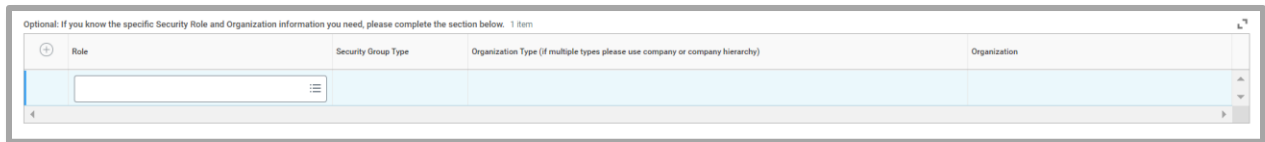   a. **Entire entity** – (all Medical Center or all Academic Division).

      b. **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).

Part 2. Select Security Roles

10. **Central roles?** Select this box if you are requesting to add or remove a central role. If it is not a central role, leave this blank.

11. **If you are adding a security role**, please complete the following table:

      a. **Provide the specific Security Role and Organization.** Click in the **Specific Role Requested** field and scroll to the role title.

NOTE	For Finance, the "Preparer for Account Certification" and "Approver for Account Certification" roles were removed from the list of requestable roles as they are assigned based on these principal roles. Users should request one of the roles from this chart instead.

      b. Depending on the role selected, subsequent fields will open in either the **Organization Type**, **Organization** and **Supervisory Organization** columns.
- **Organization Type** – Click into the field and select the appropriate organization type. *The organization type selection will differ as it depends on the role you initially selected.*
- **Organization** – Click into the field and select your organization. *The organization selection will differ as it depends on the role and organization type you initially selected.*

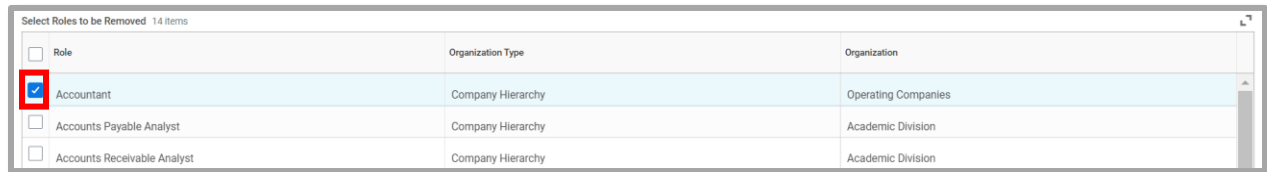|	
NOTE	Make sure that the Organization is appropriate for your needs. For example, if Company is selected in the Organization Type field, make sure that the Company listed in the Organization field is correct. (For instance, if The Rector & Visitors of the University of Virginia defaults, and you are at UVA-Wise, make sure you correct the field to reflect your proper Company.)

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

NOTE	**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).

NOTE	**For Procurement Shopper, P2P $5K Requisitioner, P2P $10K Requisitioner roles:** If you have never logged into the UVAMarketplace before, please do so prior to requesting this role to automatically establish your Marketplace account. Follow steps 1-4 of the Create and Assign a Cart QRG. Log out of the Marketplace when completed.

12. **If you are removing a security role**, please select the roles you want to remove in the table.

NOTE	**When requesting to remove a role, make sure to select a role from the table.** If a role is not selected, the request will not route properly. **Please Note:** There is a limit of 250 roles that will display during removal request.

13. **Comments/Explanation** –Please provide as much detail as possible regarding your request to remove or add security roles especially if you are not sure what specific role you need to add or remove. This description will assist data stewards in identifying the appropriate roles.

14. Read all instructions below the comment field.
15. Once finished, click **Submit for Preliminary Review**.

16. If you submitted a Finance security request, you can check whether your request has been approved or not by looking at the **Disposition column** in the **My FIN Security Requests report**.

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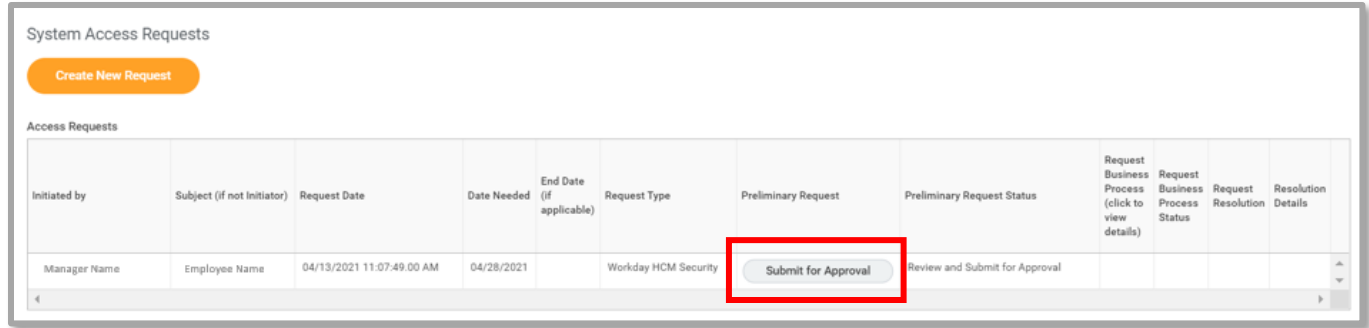
The example below is of a request submitted by a manager for a direct report.

On the Workday **Home** screen:

1. Click the **System Access Request** app.
2. Any submitted requests will display in the Access Requests report.
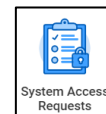
3. Click the [**Submit for Approval**] button.
4. Read the reviewer's comments in red font and all request details.

5. Click **Submit for Approval**.

6. 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.
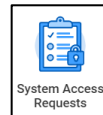
Roles that Require VPN Access

Roles that Require Training

Access Request Cancellation

Access request **initiators** can cancel their submitted requests through their Workday inbox, or, preferably, through the access request application list.

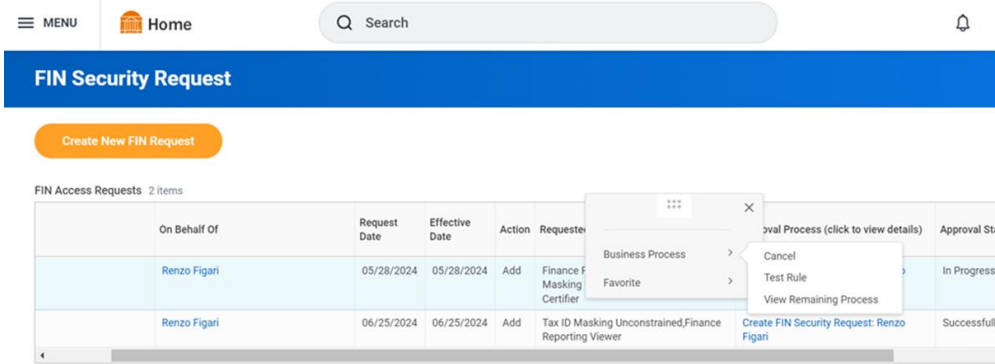On the Workday **Home** screen:

1. Click Menu and then the **System Access Request** app.
2. Click **FIN Access Requests** or **HR Access** Requests to display the appropriate Access Requests report.
3. Under the Approval Process (click to view details) column, hover over the request that you wish to cancel.
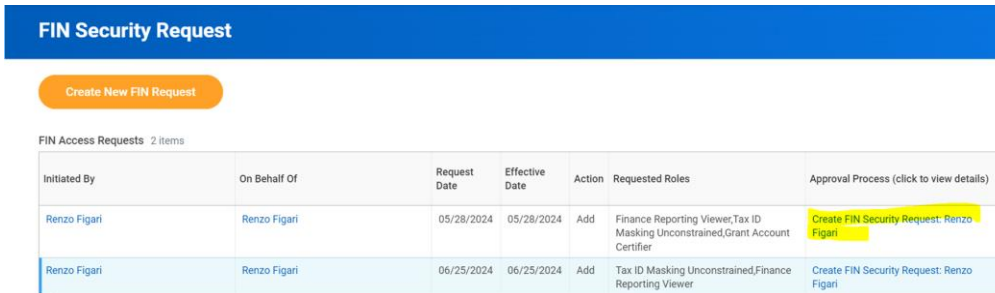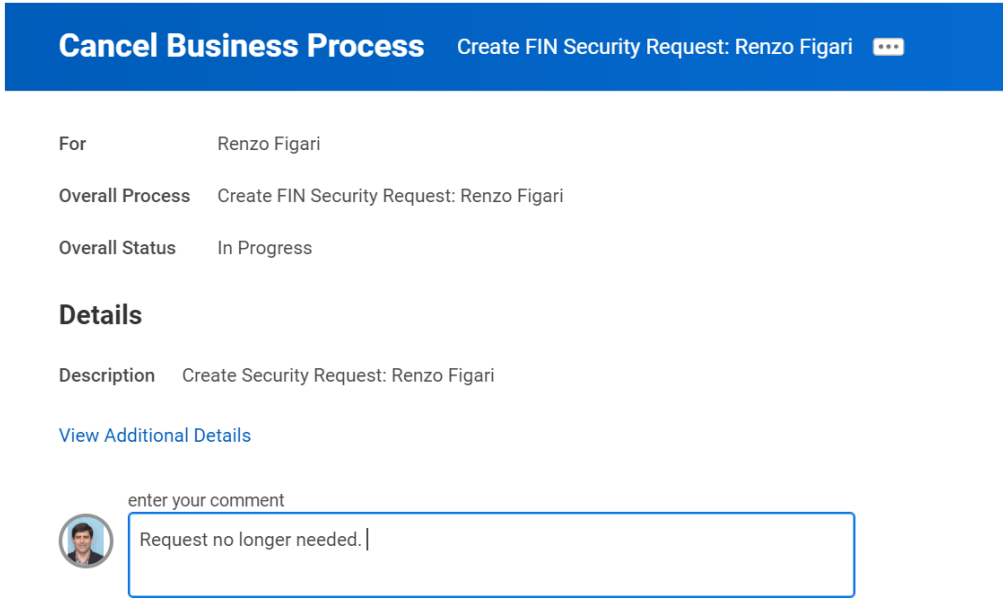
4. Click the three dot **Related Action** button > **Business Process** > **Cancel.**

5. Enter a Comment indicating the reason for the cancellation.

6. Click **Submit**

NOTE	• The subject of the request (if different from the initiator) will not be able to cancel the request. In this case, they will need to submit an AskFinance case that should be directed to the Security queue. • If the request is pending data steward approval, the cancellation will remove the task from the pending approver's inbox. • Only "In Progress" requests can be canceled. Completed, Successfully Completed, Denied, and Canceled requests cannot be undone.

HR & Finance Roles That Require High Security VPN Access (HSVPN)

Several HR & Finance 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 or

Finance and is a separate request that 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.htmld

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

For the list of **HR security roles** that need HSVPN, see below:

- 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.htmld
- Period Activity Pay Administrator course:
  https://www.myworkday.com/uva/d/inst/1$17188/17816$223.htmld

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.

	If you are requesting the **Unit Gift Manager** role, you will also need to request the **Custom Gift App User** and **Finance Reporting Viewer** (top of all hierarchies) roles. **However**, if you are not a Unit Gift Manager and you need this role for a new Gift (i.e., the gift is not yet created to be assigned to as the Unit Gift Manager), you only need to request the Custom Gift App User and Finance Reporting Viewer roles. Then submit a create custom gift request and assign yourself as the Unit Gift Manager in the Unit Gift Manager field.

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. Navigate to **My Tasks** which is your Workday inbox.
2. Click on the **Archive** tab.
3. Tasks are listed chronologically. Scroll to your submitted security request with the title beginning with **Request Process.**
4. In the body of the request, 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.