

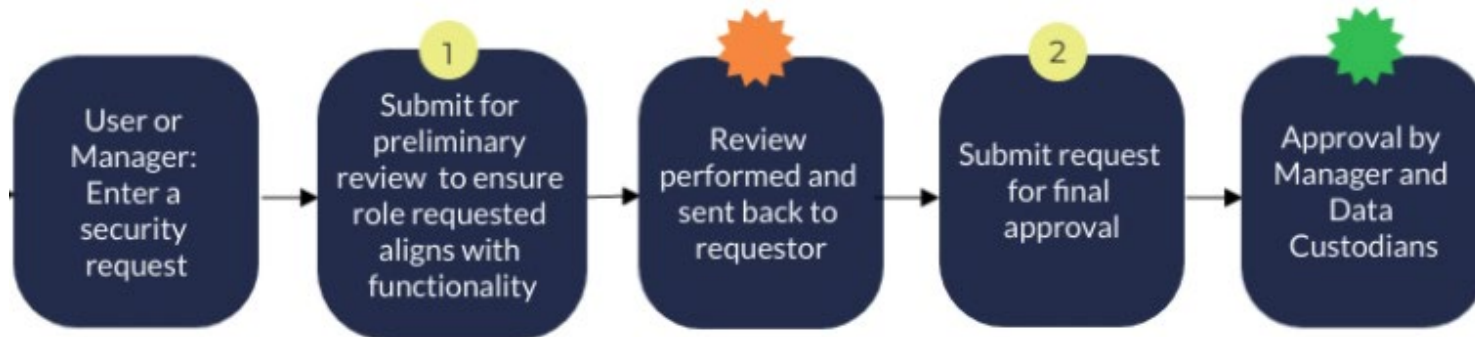
WD - System Access Requests

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. Finance Security Roles link: <https://uvafinance.virginia.edu/finance-security-roles>

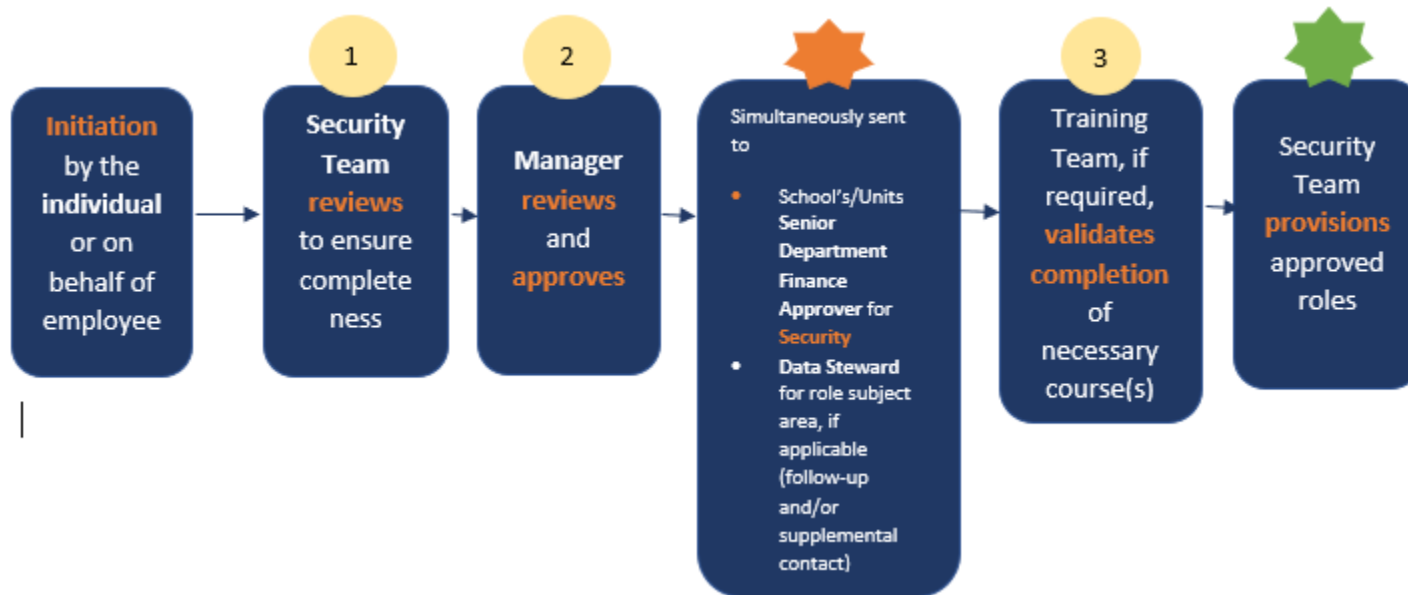
Note: Request for Learning security roles follow a different process which is communicated below.

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

HR Process:



Finance Process:



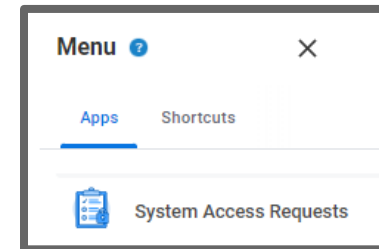
Tasks

- [Workday Learning Security Role Requests – Different Process](#)
- [Enter a Security Role Request – Step 1](#)
- [HR-Only-Submit for Approval – Step 2](#)
- [Roles That Require HSVPN Access](#)
- [List of Security Roles and Definitions](#)
- [Roles That Require Training](#)
- [What is the Status of My Request](#)

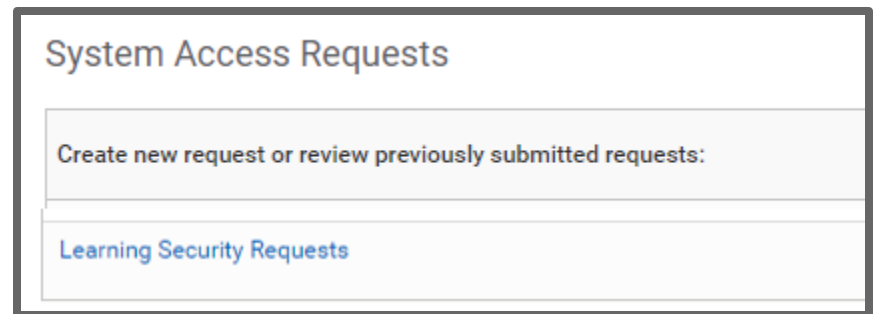
Workday Learning Security Role Request

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

1. Click the menu in the left-hand corner, then **System Access Request** app in the App Menu.



2. Under the **System Access Requests** column, click on **Learning Security Requests**. Click the **View More...** link, if applicable.



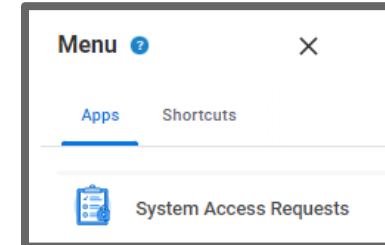
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3. Complete the questionnaire and the Learning Team will respond with the training needed to obtain the role(s).

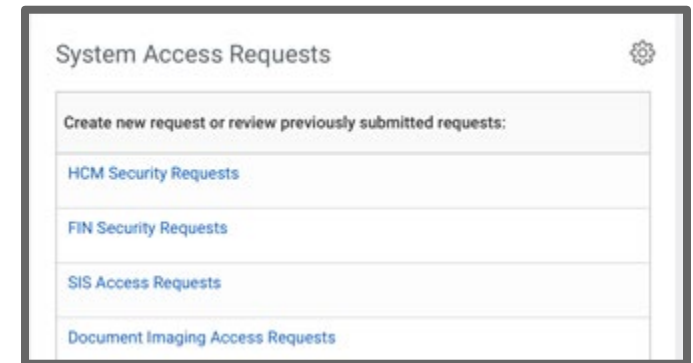
Enter a Security Role Request – Step 1

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.

1. Click the menu in the left-hand corner, then **System Access Request** app in the App Menu.



2. Select the appropriate list item for the type of request you wish to submit. If desired, use the resources links in the right-hand column to research the appropriate role. If it is an HR role, click the HCM Security Requests. If it is a Finance role, click the FIN Security Requests.



3. Select **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

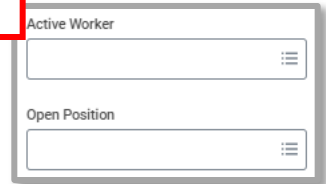
☐ Someone Else

WD - System Access Requests

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.

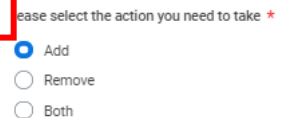
B. I & II



The screenshot shows two input fields. The first field is labeled 'Active Worker' and has a dropdown arrow. The second field is labeled 'Open Position' and also has a dropdown arrow.

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.

6



The screenshot shows a form with the title 'Please select the action you need to take *'. It contains three radio button options: 'Add' (which is selected), 'Remove', and 'Both'.

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.

Finance Security Roles link: <https://uvafinance.virginia.edu/finance-security-roles>

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).

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10. If you know 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.

11. Click the  icon to enter additional security role requests.

Optional: If you know the specific Security Role and Organization information you need, please complete the section below. 2 items

	Specific Role Requested	Organization Type	Organization	Supervisory Organization
10				
	 			
	 			

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.

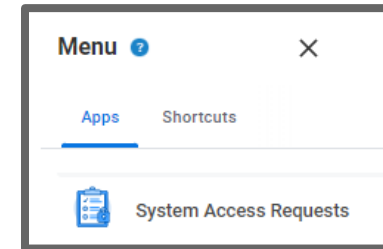
HR Only-Submit for Approval– Step 2

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.

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

1. Click the menu in the left-hand corner, then **System Access Request** app in the App Menu.



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				

3. Click the [Submit for Approval] button.

4. Read the reviewer's comments in red font and all request details.

5. Click [Submit for Preliminary Review](#) or [OK](#) depending on the role you requested.

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](#)

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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 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)

Inbox

Actions Archive

Viewing: All Sort By: Newest

Student Hiring Support Training Attestation: Request : Workday HCM Security : Shelley Tattersall
1 minute(s) ago

Request Process : Workday HCM Security : Seth E Matula
1 day(s) ago

Edit Worker Additional Data Event: Aman Chawla [C] - Non University Employee on 03/08/2021
1 day(s) ago - Effective 03/08/2021

Request Process : Workday HCM Security : Nathaniel Karl Hixson
1 day(s) ago

Student Hiring Support Training Attestation
Review Documents for Request Process : Workday HCM Security : S
1 minute(s) ago

Documents

Document HCM Security Student Hiring Support Training Attestation

Instructions Please acknowledge receipt of the Student Hiring Support Training F

Signature Statement I acknowledge that I have taken the required training for this Workda
that if I have any questions that were not addressed in training or ne

I Agree ☐

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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.

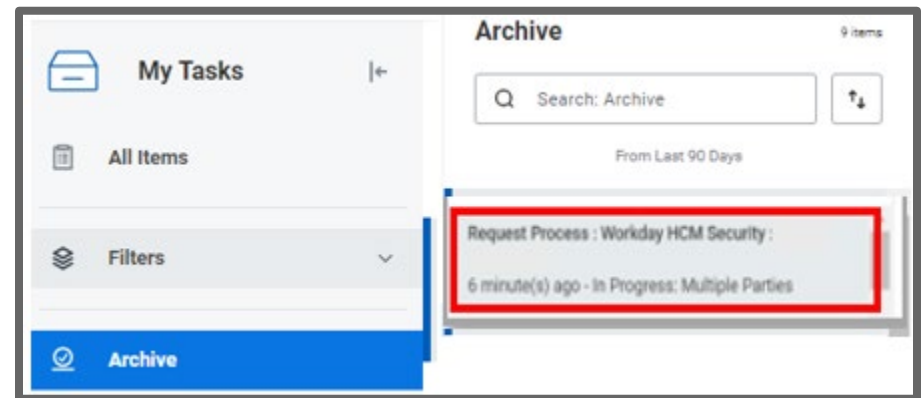
<https://hr.virginia.edu/workday-request-based-access>

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. Under **My Tasks**, click on the **Archive** tab.
3. Tasks are listed chronologically. Scroll to and click the task with the title beginning with **Request Process**:



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- 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 the table.

