MASS ROLE REQUESTS UPDATE

Attachments for Finance Access Requests

Fiscal Administrators Meeting February 2024

Workday Security & Extend Teams

WHEN DID THIS CHANGE TAKE EFFECT?

It's already live!

This update was launched on

January 25, 2024.

WHAT'S CHANGING?

The location of mass role request submission.

We enhanced the Finance System Access Request to allow users to upload Excel spreadsheets within their request instead of an Ask Finance case.

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WHY ARE WE CHANGING THIS?

Streamline Processes

Ask Finance cases do not automatically capture approvals required to assign roles. The process in Workday does this *and* significantly reduces manual work.

Audit

Auditors cited UVA for not using the same process for mass requests as standard requests, as well as not clearly documenting approvals in Ask Finance cases.

WHAT'S NOT CHANGING?

Initiators submit requests through the *FIN System Access Request* application within Workday.

The standard routing/approval rules for access requests still apply.

Only the user themselves/their manager can submit requests, per UVA Governance.

Only approved requests will receive role assignments.

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WHO CAN SEE THE ATTACHMENTS?

Users that act on the request:

- Initiators
- Managers
- Data Stewards
- System Administrators:
  - Security Administrators
  - Business Process Administrators

View only users:

- Auditors
- Workday Extend Developers
- Workday Finance Support
- User Success Agents (Ask Finance)

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DEMO

REQUIREMENTS FOR INITIATORS

Supervisory Organization for Requested Position

IT-Workday Security Operations (Kelli O'Dell)

Please select the action you need to take *

- ⦿ Add
- ◯ Remove

Are you asking for more than 25 grants/projects/worktags/organizations? *

- ⦿ Yes
- ◯ No

Download Template
Click here to download Roles Template

Part 1. Tell Us What You Need to Do

- If the initiator selects "Yes" for the required question 25 worktag question, then they must upload an attachment

- Files are limited to Excel formats

- The attachment upload section will appear in the lower half of the form

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WHERE CAN YOU GET THE TEMPLATE?

The template is available on our website:

https://uvafinance.virginia.edu/resources/workday-finance-system-access-mass-upload-request

QUESTIONS?

FEEDBACK

If you have any additional feedback, then please send your thoughts to AskFinance@virginia.edu with the title "Feedback for FIN Mass Requests"

FILE UPLOAD

If you know the specific Security Role and Organization information you need, please complete the section below. 1 item

	Role	Security Group Type	Organization Type (if multiple types please use company or company hierarchy)

Attach Supporting Document

Drop files here

or

Select files

Comments/Explanation *

Before You Submit, Read This for Next Steps:

- The Workday Security Team will review your submission to ensure appropriate access.
- You will not receive a notification when the review is finished.
- **What you will need to do:**
  - Check on submission status (1 to 2 business days after this original request): Click "System Access Requests" on Workday Home.

Submit for Preliminary Review   Cancel

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SAMPLE TEMPLATE

	A	B	C	D	E	F	G	H	I
1	Security Role Requests								
2	Function: Add or Remove	Effective Date	Employee Name	Employee Computing ID	Position ID	Employee ID	Worktag Number (CC, GR, GF, AW, PJ, etc.)	Role Name	
3	Add	10/5/2023	John Doe	JLD6Y	P111111	123456	GR12345	Grant Financial Analyst	Examples
4	Remove	10/5/2023	Jane Smith	JLS8P	P999999	678901	CC0036	Cost Center Manager	
5									
6									
7	Add	2/4/2024	Logan McNeil	lmn1ex	P00004	21001	PJ01893	Project Budget Manager	
8	Add	2/4/2024	Logan McNeil	lmn1ex	P00004	21001	PJ01910	Project Budget Manager	
9	Add	2/4/2024	Logan McNeil	lmn1ex	P00004	21001	PJ01975	Project Budget Manager	
10	Add	2/4/2024	Logan McNeil	lmn1ex	P00004	21001	PJ01986	Project Budget Manager	
11	Add	2/4/2024	Logan McNeil	lmn1ex	P00004	21001	PJ02124	Project Budget Manager	
12	Add	2/4/2024	Logan McNeil	lmn1ex	P00004	21001	PJ02172	Project Budget Manager	
13	Add	2/4/2024	Logan McNeil	lmn1ex	P00004	21001	PJ02173	Project Budget Manager	
14	Add	2/4/2024	Logan McNeil	lmn1ex	P00004	21001	PJ02176	Project Budget Manager	
15	Add	2/4/2024	Logan McNeil	lmn1ex	P00004	21001	PJ02177	Project Budget Manager	
16	Add	2/4/2024	Logan McNeil	lmn1ex	P00004	21001	PJ02179	Project Budget Manager	
17	Add	2/4/2024	Logan McNeil	lmn1ex	P00004	21001	PJ02181	Project Budget Manager	
18	Add	2/4/2024	Logan McNeil	lmn1ex	P00004	21001	PJ02182	Project Budget Manager	
19	Add	2/4/2024	Logan McNeil	lmn1ex	P00004	21001	PJ02183	Project Budget Manager	

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