

Workday Finance System Access Mass Upload Request Overview

This Quick Reference Guide (QRG) is designed to walk employees through requesting finance security roles in mass in Workday. A mass request is when more than 25 grants/projects/worktags/organizations are requested at once. Once a request is submitted, it will move through a business process for approval. Consider reviewing the **Finance** [List of Security Roles and Definitions](#) prior to making a request.

Previously, mass upload requests were done through an AskFinance request. Through this upgraded process, departments can make the mass upload request directly in Workday.


	<p>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.</p>
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Finance Roles That Require High Security VPN Access (HSVPN)

[Roles that Require VPN Access](#)

Several 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 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.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

For the list of **Finance security** roles that need HSVPN, refer to page 5 in the [Workday FIN Security FAQ](#).

Roles That Require Training

[Roles that Require Training](#)

There are roles that require that the requestor complete training prior to obtaining the role. For Finance roles, the training team will confirm and verify the training was completed before granting access to the role.

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 **Finance roles**, you can access the [Finance Security Roles page](#), that contains the list of Finance security roles and if there is any required or recommended training needed.



Enter a Security Role Mass Upload Request

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. From the Menu dropdown list, click on the **System Access Requests** app.
2. Select the **FIN Access Requests** option.
3. Click **Create New FIN 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. You can pull the list of role assignments from UBI prior to the employee’s departure.
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4 When is this request needed? * MM/DD/YYYY 	5 End Date, if applicable MM/DD/YYYY 	6 Who is this request for? * <input checked="" type="radio"/> Myself <input type="radio"/> Someone Else
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6. **Who is this request for?** – Select an option.
 - a. **Myself**

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- 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.
- 8. **Are you asking for more than 25 grants/projects/worktags/organizations?**
 - a. For a mass request, select **Yes**.
 - b. Click on “Click her to download Roles Template”.

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

- Yes
 No

Download Template

[Click here to download Roles Template](#)

- c. You will be taken to another page, titled “Security Roles Request – Mass Upload Template”, which contains a link to the template.
- d. Click on the link.

Security Roles Request - Mass Upload Template

Fill out this template if you have more than 50 roles to request. Instructions are on the first tab in the template below.

File



- e. Create your Mass Upload request in the template.
 - i. The instructions for filling out the template are on the Instructions tab at the bottom of the template file.
- f. Save your template.

Part 1. Tell us What you Need to Do

- 9. **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 Finance [List of Security Roles and Definitions](#) to understand if you know the exact role title.

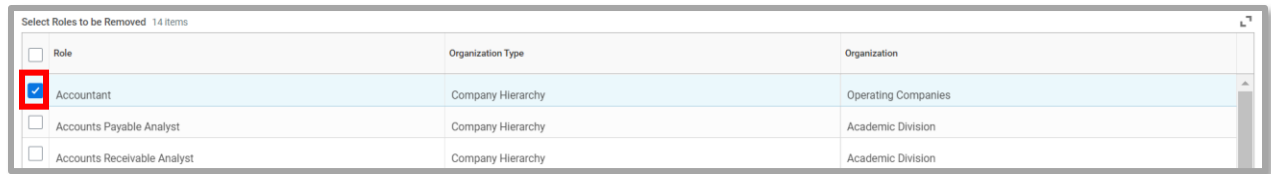
- 10. **What Schools, Departments or Units do you support** – Enter the most specific information possible. Examples:
 - a. **Entire entity** – (all Medical Center or all Academic Division).

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- 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

11. **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.
12. Please enter your requested role.
13. **If you are removing a security role**, please select the roles you want to remove in the table.



Role	Organization Type	Organization
<input checked="" type="checkbox"/> Accountant	Company Hierarchy	Operating Companies
<input type="checkbox"/> Accounts Payable Analyst	Company Hierarchy	Academic Division
<input type="checkbox"/> Accounts Receivable Analyst	Company Hierarchy	Academic Division




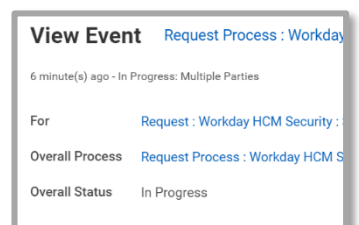
When requesting to remove a role, make sure to select a role from the table. You must select the role(s) to be removed from the grid. You can select up to 20 roles per request.

14. **Attach Supporting Documents:** Attached saved “Security Roles Request – Mass Upload Template”.
15. **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.
16. Read all instructions below the comment field.
17. Once finished, click **Submit for Preliminary Review**.
18. If you have 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**.

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.



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6. For subsequent steps, click **Remaining Process** below the table.

Remaining Process

