THE UNIVERSITY OF BRITISH COLUMBIA

SECURITY ROLES AND ASSIGNMENTS

JUNE, 2023

AGENDA

1 | About Security in Workday

2 | Security Role Definitions

3 | Security Role Request Template and Process

4 | Tips and Questions
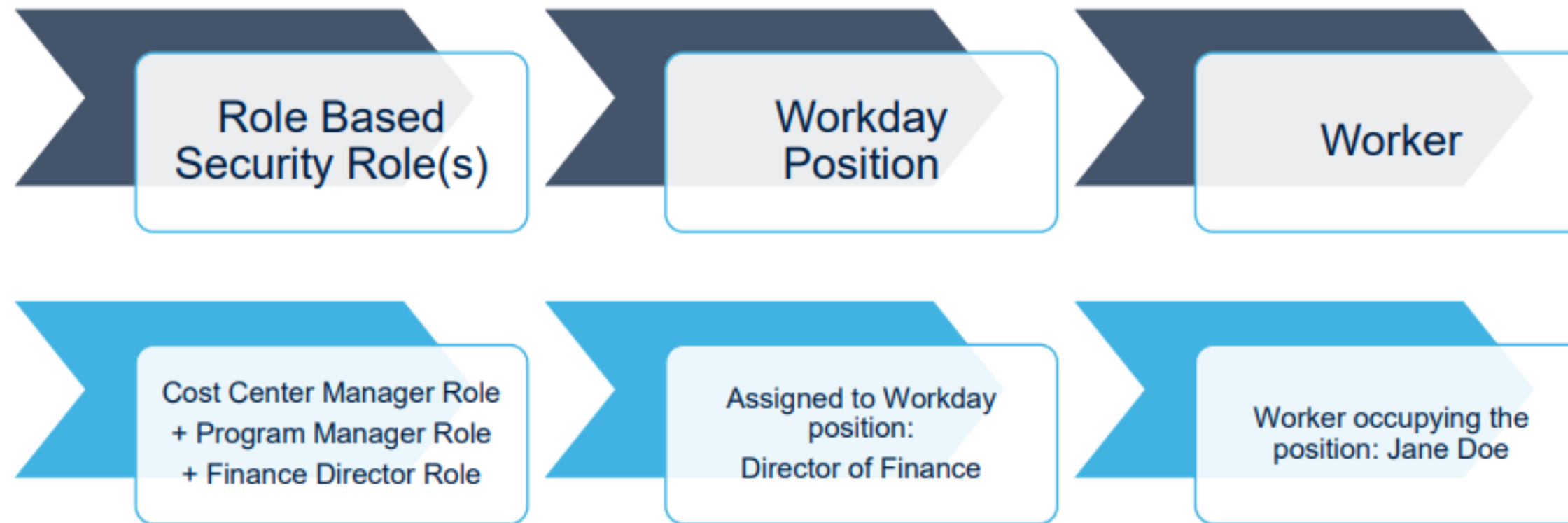
INFORMATION REQUIRED BEFORE YOU START

- ✓ Type of change (add/remove)

- ✓ Employee name and ID

- ✓ Position ID and title

- ✓ Reason for request. <mark>These are provided in the template.</mark>

- ✓ Finance/HR role requested. <mark>These are provided in the template.</mark>

- ✓ Organization reference ID (Worktag ID, such as Cost Center, Program, Grant number etc.)
- ✓ Supervisory Organization number and name.

SECURITY IN WORKDAY – ROLE BASED

Access to Workday functionality is dependent on assigned security roles that pertain to specific business processes and data. **Role-based** security roles are assigned to positions.

Example:

Role Based Security Role(s)	Workday Position	Worker
Cost Center Manager Role + Program Manager Role + Finance Director Role	Assigned to Workday position: Director of Finance	Worker occupying the position: Jane Doe

✓ Security to information in Workday is tied to "Roles", such as Program Manager, HR Analyst, etc.

✓ Roles are attached to a Position in Workday

✓ Workers are hired to a position in Workday

✓ When creating NEW positions in Workday ALWAYS complete the security role request form to assign specific security needed to a position. All Positions automatically receive the "employee as self" functionality that allows them to create their own expenses reports or procure goods.

✓ HR Security roles are assigned to Supervisory organizations

✓ Finance Security roles are assigned to Worktags such as Cost Center, Program, Grant, Gift, or even Company level

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WORKDAY SECURITY – ACTIONS

Actions that can be taken by various security roles:

Initiate: Initiate a business process

Review: Review, Send Back to initiator to Edit a transaction

Approve: Approve, Deny or Send Back a transaction

View: View financial information for a specific worktag(s)

HOW TO FIND WHICH SECURITY ROLES HAVE BEEN ASSIGNED

There are a few ways to go about this…

✓ Run the report **'Security Role Assignments - Distributed'**
   ✓ This report lists the security roles assigned to a supervisory organization (and you can choose all subordinates); you can also choose to run report for a specific security role, or leave blank for all security roles or for a specific worker. NOTE: Supervisory organization is a mandatory field.

✓ Run the report **'Role Assignments for Worker Position'**
   ✓ This report only shows the security roles assigned to an individual worker.
   ✓ Enter the name of the worker in the ***"Worker"*** field.

✓ In the Search bar => enter the name of the Sup Org, Cost Center, or other Worktag => click the ***'Roles'*** tab:
   ✓ This will show you all security roles assigned to this particular Worktag and who holds the role.

✓ Find Security roles for a vacant position: Run the report **'Security Role Assignments for Vacant Positions – Distributed"**
   ✓ Enter a specific position ID in the Vacant position ID field.
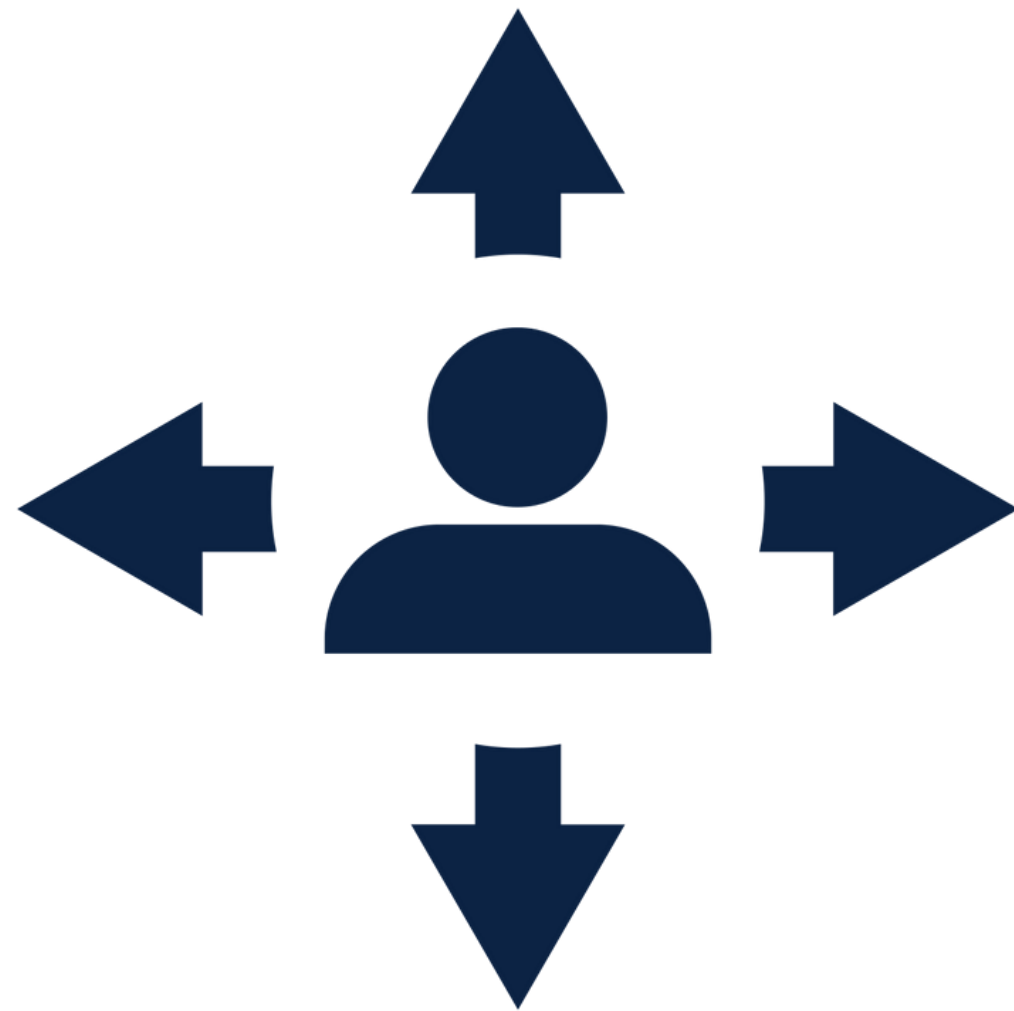
COMMON SECURITY ROLES

COMMON HR SECURITY ROLES – HR ANALYST – THE "DO'ER" ROLE"

Typical UBC Position	Security Role in Workday	Can they initiate, action, and/or review?	Examples of what they can do in Workday	Inheritance
Faculty/Unit Administrators	**HR Analyst**	Initiate HR BPs only View HR specific HR information NO APPROVALS	✓Create position, job requisitions, and complete hire activities ✓Create/change costing allocations for a position and/or worker ✓View job details, compensation, time off balances, contact details ✓Initiate absence requests, compensation changes, change job (transfer, FTE, etc.), termination ✓Can 'add approver' for the Manager or HR Partner to approve if not already part of the approval process ✓Act on BPs of employees in Supervisory Organizations they support ✓Initiate student hires/job changes	✓ Initiate Human Resource BPs and see Employee data only for Sup Orgs / Subordinate Sup Orgs for which they have been given security. ✓ If access is given to all sup orgs below a sup org, this access will be inherited down until another person is assigned the HR Analyst security role. ✓ To avoid losing access to this, ISC must manually add that particular sup org to the users access.

COMMON HR SECURITY ROLES – MANAGER (APPROVER AND "DO'ER")

Typical UBC Position	Security Role in Workday	Can they initiate, action, and/or review?	Examples of what they can do in Workday	Inheritance
Anyone who is a manager of a Sup Org will <mark>automatically</mark> get assigned the role 'Manager' (requests for new sup orgs is done through ServiceNow)	**Manager**	Initiate HR BPs View specific HR information Review and Approve for sup orgs they have been given security to	✓ Create, review, and approve positions and job requisitions (job postings) ✓ Create/change costing allocations for a position and/or worker ✓ Review, and approve hires, job changes, re-hires, add additional jobs, and terminations for employees ✓ Input, review, and approve long-term and/or temporary compensation changes, job data changes (e.g. FTE, employment dates, etc.)	This role can initiate BPs and see employee data for the Sup Orgs they are assigned on as well as any Subordinate Sup Orgs. This role will approve BPs only for the Sup Orgs they support. Cannot initiate and approve the same BP

COMMON HR SECURITY ROLES – TIMEKEEPER

Typical UBC Position	Security Role in Workday	Can they initiate, action, and/or review?	Examples of what they can do in Workday	Inheritance
Unionized Supervisors with responsibility for entering time/payroll hours	**Timekeeper**	Initiate HR BPs Review for sup orgs they have been given security to	✓ Can approve time entry related tasks when an employee enters their own time <u>on behalf</u> of the sup org manager ✓ Can initiate time entry related tasks on behalf of Employees for Sup Orgs which they support Time Tracking functions ✓ Manager will be required to 'Approve' time entries	This role can initiate the Time Enter BPs for the Sup Orgs they are assigned to. This role will approve BPs only for the Sup Orgs they support.

Important: Timekeeper is ***not an absence role!*** Timekeepers will not have access to review/initiate leave/absences/vacation for their Sup Org. HR Analysts and Managers have absence access for their Sup Org.

ACADEMIC FACULTY ANALYST: ADDING/UPDATING ACADEMIC APPOINTMENT

Academic Faculty Analyst can add an Academic Appointment to a faculty member.

Academic Appointments enable greater visibility into a Faculty member's academic career. The sub-process will kick-off for any faculty profile that is engaged in teaching, or one that goes through a formal promotion process. Includes information such as tenure status, Academic Unit and rank.

Important: The Academic Faculty Analyst security role allows the individual to see and manage Academic Appointments and Academic Units.

Initiator (auto routes to the person who initiated the Hire BP)	Review/Approve
Academic Faculty Analyst	FR Executive

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HR SECURITY ROLES – HOW INHERITANCE WORKS?

For HR Security Roles (not Finance), Inheritance of security works as follows:

If you assign a security role at a specific supervisory organization, and then indicate "and all subordinate supervisory organizations:

➢ That security role will be assigned at the specific organization you identified and everything below it.
➢ If subsequently, another position is assigned that security role at one of the lower supervisory organization, this will nullify the first positions security access to that supervisory organization.

HR SECURITY ROLES – HOW INHERITANCE WORKS?

Superior Supervisory Organization	UBCO | Senior Leadership | VP Finance and Operations (Rob Einarson)	
Subordinates	UBCO | Engagement Services | UBCO IT	UBCO | Audio Visual | UBCO IT
	UBCO | Office of Campus Planning	UBCO | Sustainability | Campus Planning
	UBCO | Finance Strategies Leadership	UBCO | Finance Strategies | Finance
	UBCO - Finance Operations Leadership | VP Finance and Operations	
Example:		
On June 1, 2023 IT requested to assign Tom Jerry in Position # 123456 the HR Analyst security role to the Supervisory organization Engagement Services UBCO IT and all subordinate organizatons		
Tom Jerry will hold HR Analyst security role for both supervisory organizations:		
	UBCO | Engagement Services | UBCO IT	
	UBCO | Audio Visual | UBCO IT	
Then on July 1, 2023, IT requested to assign Bugs Bunny the HR Analyst security role to supervisory orgranization:		
	UBCO | Audio Visual | UBCO IT	
After this addition, security to the IT Supervisory organizations will look as follows:		
Tom Jerry - Position #123456	HR Analyst	UBCO | Engagement Services | UBCO IT
Bugs Bunny - Position 0987656	HR Analyst	UBCO | Audio Visual | UBCO IT
Tom Jerry will no longer have the HR Analyst security role for supervisory		
When you ADD the security to Bugs Bunny you must also add it for Tom Jerry		

INITIATORS OF FINANCE TRANSACTIONS

"Employee as self" - All employees automatically have these Workday applications

Applications
20 items

Pay

Purchases

Expenses

Personal Information

All employees automatically have access to initiate certain transactions for themselves, such as:

✓ Purchase Requisitions/Orders
✓ Receive goods or services for which they created the purchase order
✓ Create supplier requests
✓ Create expense reports

You do not need a special finance security role to perform these functions

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FINANCE SECURITY ROLES – COST CENTER RECEIVER

Typical UBC Position	Security Role in Workday	Can they initiate, action, and/or review?	Examples of what they can do in Workday
Administrative support, Faculty(Researcher)	**Cost Center Receiver**	Initiate & View	✓ Can receive goods and services in Workday on behalf of other requestors in their unit ✓ Goods and services must be received in Workday before payment can be made to supplier ✓ View PO information, invoices paid on a PO, create change-orders (only for the cost center they have security to)

Important: The creator of the purchase requisition is automatically assigned this role in Workday for that specific purchase order.

FINANCE SECURITY ROLES – COST CENTER ACCOUNTANT CLERK

UBCO Finance approves this security role and you must attend training on this security role prior to being assigned it

Typical UBC Position	Security Role in Workday	Can they initiate, action, and/or review?	Examples of what they can do in Workday
Administrative support	**Cost Center Accountant Clerk** (assigned only after training completed)	Initiate & View	✓ Create and modify accounting adjustment (supplier invoice & expense) ✓ Create new worktag request (cost center, program, project, gift/initiative) ✓ Modify worktag ✓ And inactivate worktag request

FINANCE APPROVER ROLES - "BUDGET OWNER"

Typical UBC Position	Security Role in Workday	Can they initiate, action, and/or review?	Examples of what they can do in Workday
Budget Owners (Deans, Dept. Heads, Managers/Directors)	**Cost Center Manager**	View, Review & Approve – ability to view ALL financial information with the Cost Center and related Worktags below that Cost Center, including payroll	✓Run and view financial information for specific Cost Center and all related Worktags below the Cost Center (i.e. Program, Grant, Gift, Project) i.e. Ledger Summary - distributed Payroll Summary – Distributed Over/Under Reports (with drill in functionality to payroll information) ✓Approval authority for financial transaction (business processes) for specific Cost Center **AND** Worktags below the Cost Center that do not have a manager assigned
Typical UBC Position	**Security Role in Workday**	**Can they initiate, action, and/or review?**	**Examples of what they can do in Workday**
Any position responsible for a budget	**Program Manager, Project Manager, Gift Manager, Grant Manager, Gift Initiative Manager**	View, Review & Approve - ability to view ALL financial information with the Cost Center and related Worktags below that Cost Center, including payroll	✓Run and view financial information for the specific Worktag (i.e. Program, Grant, Gift, Project) i.e. Ledger Summary - distributed Payroll Summary – Distributed Over/Under Reports (with drill in functionality to payroll information)

FINANCE APPROVER ROLE – FINANCE HCM PARTNER

Typical UBC Position	Security Role in Workday	Can they initiate, action, and/or review?	Examples of what they can do in Workday
Senior Manager within unit	**Finance HCM Partner**	Review and Approve	Finance approval for HR specific business processes, such as: ✓Job requisition ✓Hire ✓Add job/change job ✓One time payments (payroll) Provides an additional layer of approvals
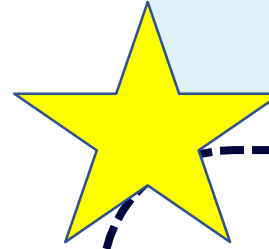
Important: Approval by Finance HCM Partner *is required for*: Faculty Tenure/TenureTrack/Term Appointments, Staff, Executive

Finance HCM Partner Approval *is not required for*: Clinical Faculty (unpaid only), Post Docs, and Research Associates, Student Workers

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FINANCE "VIEW ONLY" SECURITY ROLES

Typical UBC Position	Security Role in Workday	Can they initiate, action, and/or review?	Examples of what they can do in Workday
Faculty/Unit Administrators	**Cost Center Financial Analyst**	View only role – without view access to payroll details (for **cost centers** they have been given security to)	Run and view financial information for Cost Center and all related worktags below the Cost Center i.e. Ledger Summary - distributed Over/Under Report (no drill in functionality to payroll information)
Faculty/Unit Administrators	**Cost Center Financial Payroll Analyst**	View only role – with view access to Payroll details (for **cost centers** they have been given security to)	Run and view financial information for Cost Center and all related worktags below the Cost Center i.e. Ledger Summary - Distributed Payroll Summary – Distributed Over/Under Report (with drill in functionality to payroll information)
Faculty support staff, lab assistants	**Grant Financial Analyst**	View access to Grant transactional information – No access to drill into payroll information	Run and view financial information for specific Grant i.e. Grant Ledger Summary
Faculty support staff, lab assistants	**Financial Payroll Analyst**	View access to Program, Grant payroll information Tied to Program Financial Analyst or Grant Financial Analyst All or none ONLY	Run and view financial information for specific Grant i.e. Grant Ledger Summary Payroll Summary – Distributed
Faculty/Unit Administrators	**Program Financial Analyst**	View only role – without access to payroll details (for **Programs** they have been given security to)	Run and view financial information for assigned Program. i.e. Ledger Summary - distributed Over/Under Report (no drill in functionality to payroll information)
Administrators/Finance Manager/Director	**Finance HCM Analyst**	View only access to HR data (needed to perform financial planning/analysis)	Data includes: ✓ Legal Name ✓ Employee ID ✓ Current status (ongoing, term, leave of absences, etc.) ✓ Position details (Start Date and End Dates, rank- i.e. Professor) ✓ Position history (Start and End Date for prior positions) ✓ FTE ✓ Compensation (salary and benefits) ✓ Compensation history ✓ Costing Allocations ✓ Position ID and Position Status

Assigned at the *Cost Center* level. Not assignable for lower worktags (i.e. Program, Grant)

Assigned for specific Worktag
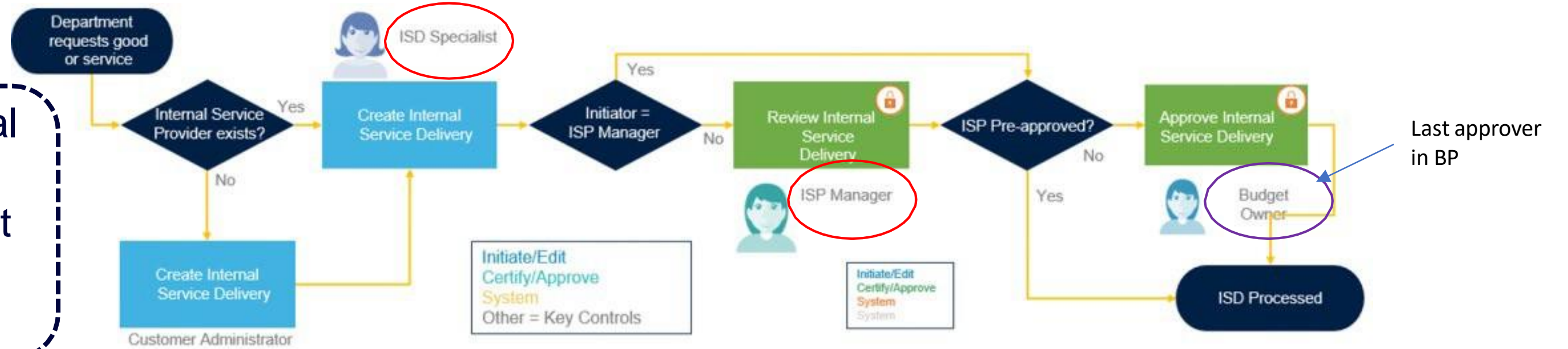
Assigned at the *Program* level

If HR security role is already assigned, user likely does not need this security role

FINANCE SECURITY ROLES FOR INTERNAL SERVICES
(SALE OF A GOOD OR SERVICE BETWEEN TWO UNITS WITHIN THE UNIVERSITY)

Important: The Internal Sale transaction is initiated by the unit that is *providing the service.*


Typical UBC Position	Security Role in Workday	Can they initiate, action, and/or review?	Examples of what they can do in Workday
Administrative position	**ISD Specialist** **(Internal Service Delivery Data Entry Specialist)** Resides in the unit providing the service	Initiate	Create Internal Service Delivery transactions for sales between UBC units
Manager	**ISP Manager** **(Internal Service Provider Manager)**	Approve	Approves Internal Service transaction (this is NOT the budget owner)

FINANCE SECURITY ROLE– STUDENT EXPENSE REPORT INITIATOR

Typical UBC Position	Security Role in Workday	Can they initiate, action, and/or review?	Examples of what they can do in Workday
Graduate/Undergraduate Program Assistants **Administrative Assistants**	**Student Expense Report Initiator**	Initiate	Initiate expense reports in the Workday Expenses module for student expense reimbursements
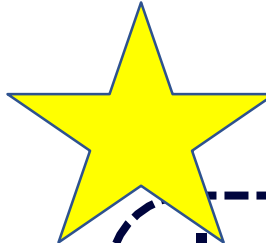
Important: This role is not assigned to a worktag (i.e. Cost Center, Sup Org). This role is assigned to 'UBC' to allow those with this role to process expense reports for any UBC student.

SECURITY ROLE REQUEST TEMPLATE

Step-by-Step Instructions

Step 1: Download the Template

1.1 Download the 📁 Security Role Request Template (Excel file).

> **Note**: Template updated in June 2021 (Rev 24): New column (F) added to indicate if the security role is requested for a Hiring Solutions employee; column references updated.

Step 2: Complete the Form

Read the instructions at the top of the template.

2.1 Complete the header information:

- Faculty or Unit
- Finance Director / HR Submitter: Enter name(s) and indicate that you're attaching approvals to the request.

2.2 For **all requests**, enter the following information for **each position**:

- Type of change (add/remove)
- Worker Name
- Employee ID
- Position (Title)
- Position ID
- Hiring Solutions?
- Requirement for the role (Why the change is required?)

Position Details						
Type of change	Worker Name	Employee ID	Position	Position ID	Hiring Solutions?	Requirement for the role (If applicable)
Are you adding or removing a role assignment? **Please pick from the drop-down menu.**	Provide the name of the Worker that this role should be assigned to.	What is the person's employee ID?	What is the position of the person being mapped against this role?	What is the position ID of the corresponding position?	Yes if this is a Hiring Solutions position, otherwise No	Why is this change required?

1   Go to UBC ServiceNow search for '**Security Role Request Process**'

2   Click the link to download the security role request template

3   Complete template and send to your Finance Manager for approval

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COMPLETING THE SECURITY ROLE TEMPLATE

Finance Director = your Finance Manager. You will need to ensure your Finance Manager is aware of, and approves, all Finance role requests for your unit.

This template is updated regularly. Be sure to download the latest version at the link provided.

Finance roles must have approval from the Finance Director to be provisioned. HCM requests must be submitted by someone holding an HR security role in Workday. Columns A - F are mandatory.
For Finance roles, columns G-J must also be populated, and for HCM roles, columns K-M are required.

Faculty or Unit:		(if more than one, list them all)

	Name	Approved?
Finance Director		
HR Submitter		N/A

Before you start, are you using a saved copy of this form? Please login to the self-service portal at https://ubc.service-now.com/selfservice.
Then get the latest copy here (copy and paste link for best results).

Add as many rows as required

Position Details						Finance Secu
Type of change	Worker Name	Employee ID	Position	Position ID	Requirement for the role (If applicable)	Finance Role Name	Eligible Organization Type for Ro
Are you adding or removing a role assignment? **Please pick from the drop-down menu.**	Provide the name of the Worker that this role should be assigned to.	What is the person's employee ID?	What is the position of the person being mapped against this role?	What is the position ID of the corresponding position?	Why is this change required?	Please pick from the drop-down menu. Review role definitions here.	Which level of the hierarchy does the role need to assigned to? **This cell automatically populates the required organization type based on the you have selected in column F.** Please refer to information and add the organization ID for the rol are assigning in column I.

COMPLETING THE SECURITY ROLE TEMPLATE

Add as many rows as required

Position Details					
Type of change	**Worker Name**	**Employee ID**	**Position**	**Position ID**	**Requirement for the role (If applicable)**
Are you adding or removing a role assignment? **Please pick from the drop-down menu.**	Provide the name of the Worker that this role should be assigned to.	What is the person's employee ID?	What is the position of the person being mapped against this role?	What is the position ID of the corresponding position?	Why is this change required?
EXAMPLE: Remove	John Smith	123456	Manager	P00123456	Reorganization
EXAMPLE: Add	Juanita Brava	123456	Manager	P00125698	Missing role blocking BPs

President's Office | UBC (Santa Ono) (Actions)

Type	Supervisory	Subordinates	Leadership	President's Office (Santa Ono (Inherited))
Organization ID	SO11940		

Details   **Members**   Roles   Security Groups   Organization Assignments

Members 1 item

Worker	Position	Phon
Santa Ono	P000012838 President	

To find the Position ID, search for the employee in Workday and find their Sup Org. Click on 'Members'.

COMPLETING THE SECURITY ROLE TEMPLATE

SUBMITTING SECURITY ROLE REQUEST

Submit a Workday support request for help with a Workday-related issue

Category: ❓

Note: The options below will change based on the top category you select. See the full list.　　✕

Access and Roles ▾

Select an Access and Roles subcategory:

Security Role Request ▾

Security role requests require additional information and documentation.
Please follow the instructions in this **Knowledge Article.**

Options

☐ This request includes an individual who supervises the work of other people and/or oversees a budget
☐ This request includes a Grant Manager role

Detailed Description

Please provide a short title for your request

Batch Security Role Request

* Please provide a detailed description of your request

This is a batch security role request for Cost Center Accountant Clerk. All listed employees have fulfilled the pre-requisite for this access. Please see attached the Security Role Request and Approver email.

Urgency

What is the urgency of your request? ❓

Urgency is a measure of how critical the reported issue is on your day to day business functions. If the issue requires an immediate response please select "High". If an immediately response is not required select either "Medium" or "Low" as you feel appropriate.　　✕

1 - High ▾

📎 Add attachments

Submit

4 Go to UBC ServiceNow and click '**Get Workday Support**'

5 Select '**Access and Roles**' for the category, and the subcategory **as** '**Security Role Request**'

6 Attach your completed template and click Submit

SOME TIPS....

o Security roles assignments can be future dated

o For HR business process - When a position becomes vacant the person who is assigned the same role in the higher supervisory organization will inherit the security role by default.

o For Finance business processes – When a position becomes vacant, the business process may halt until the request form has been completed to assign that security role to a different positions AND you will need to request the ISC subsequently reassigns or resets the business processes that are stuck

o Positions can have multiple security roles assigned to it; depends on the what that position is required to do.

Q&A

How do I see all the security roles assigned for my whole department?

o Run report **"Security role assignments – Distributed"**

- o In the supervisory Organization field choose from the drop down the Cost Center Hierarchy and then click the box "Include subordinate organizations OR

- o In the supervisory organization, choose the superior supervisory organization and then click the box "Include subordinate organizations

Q&A

How do I see the security roles assigned for myself?

o Go to your profile => Actions => Security Profile => View Role Assignments for Worker Position

  o In the pop up box, if you want to see what security has been directly assigned to your position just click "OK"

  o If you want to see the security assigned to your position directly plus anything that is inherited click the box "Include Inherited Role Assignments"

     OR

o Run report **"Role Assignments for Work Position"**

Q&A

How do I see the security roles assigned to a worker?

o Go to your profile => Actions => Security Profile => View Role Assignments for Worker Position

  o In the pop up box, if you want to see what security has been directly assigned to your position just click "OK"

  o If you want to see the security assigned to your position directly plus anything that is inherited click the box "Include Inherited Role Assignments"

  OR

o Run report **"Role Assignments for Work Position"**

Q&A

Can I assign security roles to a vacant position?

o You can assign security roles to a new position as soon as it's created. Note that, security roles are specific to 'positions' and not an employee. Hence, you don't necessarily need to have the employee or new hire's name to assign roles. The position gets the assignment.

SECURITY ROLES HELD BY CENTRAL HR & FINANCE ONLY: DEFINITIONS

HR SECURITY ROLES – HELD BY CENTRAL HR

Typical UBC Position	Security Role in Workday	Can they initiate, action, and/or review?	Examples of what they can do in Workday
UBCO Central HR Advisors and Associates	Central HR Partner	Initiate, Review and Approve	✓ Create, review, and approve positions and job requisitions (job postings), move workers ✓ Initiate, review, and approve hires, job changes, re-hires, add additional jobs, and terminations for employees ✓ Input, review, and approve long-term and/or temporary compensation changes, job data changes (e.g. FTE, employment dates, etc.) ✓ Act on BPs of employees in Supervisory Organizations they support
	FR Executive	Review and Approve	✓ Review and approve term faculty job requisitions, add academic appointment, faculty compensation changes, faculty one-time payments, faculty change job, and create position for academic hires.
	HR Executive	Review and Approve	✓ Review and approve Staff/Student HCM related tasks ✓ Full Workday access
	PD Partner	Review and Approve	✓ Review and approve BCGEU PD Fund requests
	Compensation Partner	Review and Approve	✓ Review and approve HCM business processes related to job classification and compensation ✓ Can 'add approver' to HR Executive if further review/approval is required ✓ Full Workday access

FINANCE SECURITY ROLES- HELD BY CENTRAL FINANCE

Typical UBC Position	Security Role in Workday	Can they initiate, action, and/or review?	Examples of what they can do in Workday
Central Finance Manager	**Cost Center Accountant**	Initiate	✓Request new worktags ✓Request a change to an existing worktag ✓Perform accounting adjustments ✓Perform Accounting Journals
Central Finance Manager	**Finance Director**	Review and Approve	✓Approves all accounting adjustments and journal entries greater than $15,000 ✓Is an FYI to someone responsible for forecasting and budgeting ✓Does not replace a budget approval where needed
Central Procurement Staff	**Buyer**	Initiate, Review and Approve	
Central Accounts Payable staff	**Expense Partner**	Review and Approve	✓Reviews and approves Expense report transactions for UBCO campus
Central Finance Staff	**Department Asset Tracking Specialist**		✓Registers the equipment (asset) ✓Initiate a disposal of an asset or transfer between units

UPCOMING WORKDAY WEDNESDAY:

Topic: Hiring Students

Date/Time: July 12, 2023 | 10:00 am

Hosts: HR Team

[**Meeting Link**](Meeting Link)