PURPOSE
This user guide provides an in-depth look at the functionality and characteristics of the Workday Security Access Request form and how to initiate a request for access to various LSU Financial and Human Capital Management modules.

CONTACT
Financial Systems Services – fsshelp@lsu.edu
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What is the Workday Security Access Request application?

It is a Business Process Management procedure developed to promote business efficiency and effectiveness by utilizing an automated, electronic process. This web-based process will be accessed by various members of the LSU community seeking access to (or the removal of access from) the many Financial and Human Capital Management modules available in the Workday system and will include automatic routing through the appropriate approval processes as prescribed by University policies. The Workday Security Access Request application can be initiated by accessing the Workday Security Access Request link under the Financial Services heading on the left-hand side of the MyLSU desktop and as a link within LSU’s Workday help desk ticketing system, Service Now.
Getting Started – Module Administrator Contacts Tab

Once the Workday Security Access Request link is clicked, the form will open in a new window displaying a description of the process, a list of Module Administrators/contacts that can be contacted with any access questions pertaining to their specific modules, and a link to the University’s security use policy. The security use policy must be read, understood, and agreed to by the Requestor prior to being allowed to continue with the process. The “I agree” button at the bottom of the page must be clicked to continue.

Figure 2: Security Access Request Form - Module Administrator Contacts Tab
Request Tab

The first page of the process is the Request Tab and consists of entering information for the user that will be receiving the system security access. There are a few items to note on this page:

1. The Requestor name will automatically populate for access requests in the top right corner of the request.
2. Access can be requested on behalf of another user, and this determination can be made by answering the “Are you requesting access on behalf of another individual?” question. If the answer is NO, then the user information is populated to reflect that the Requestor is also the Recipient of the access that will be requested. If the...
answer is YES, then a myLSU ID for the Recipient is required. Once the myLSU ID is entered, it will be used by the system to automatically populate the remaining fields in the Recipient Information section.

3. This form allows you to Add and/or Remove access in a single request. In the “Add Security Items” section, first choose the module in which the role resides. Once a module is chosen, the role dropdown box will be filtered to show all roles that exist within that module. Once the desired role is selected, an organization type and organization value box appears only if the role selected is a role-based role which requires an organization for which the role will be assigned. Once all required fields are entered, select “Add Selected Access” to save your selections to the “Security Items to be Added/Removed” section.

4. In the “Remove Current Access” section, you have the ability to select access to remove from the user’s account. You can select individual items by clicking the item in the grid and selecting “Remove Item” or, alternatively, you can remove all access the user currently possesses by selecting “Remove All Access”.

5. The “Security Items to be Added/Removed” section is a summary of all items selected (to Add or Remove) for the request.

6. You can access the Comments Tab by clicking the tab labeled “Comments” at the top of the page or by clicking the “Add Comment” button at the bottom of the Request page.

7. Once a Recipient of the access is chosen, all Managers and Manager delegates for the user will be listed as options under the “Manager” field.

8. If the Manager(s) provided in the dropdown box is/are deemed inaccurate or if no Manager(s) appear in the dropdown box, click the “Check if manager is missing or inaccurate” check box. Once the box is checked, enter the correct Manager information in the box that appears. This information will be automatically routed to the departmental HR contact to be corrected in the Human Capital Management (HCM) module and the request will then be placed back in the approval workflow (see Figure 3b).
Comments Tab

This page is designed to help Requestors, Approvers, and other users review any comments that have been added to the request throughout the entire process. Start by typing the comment in the Add Process Comment box and save the comment by clicking “Save Comment”. You will see your comment saved to the Process Comments log found in the Process Comments section. Each comment entry is logged with a commenter name, the commenter’s role, and the date and time of when the entry was created.

In order to return to the Request page click on the “Request” tab at the top of the page or click the “Return to Request” button at the bottom of the page.

Submitting the Request for Approval

Once the access has been selected, comments are added to the request, and the Requestor is back on the Request page, there is still an opportunity to modify the Recipient information prior to submitting. Click the “Edit Recipient Information” button in the Recipient Information section. However, please note that changing the Recipient on the request will remove all access added to the request for the previously selected Recipient, and the Requestor would have to add the access for the new Recipient once the new Recipient is chosen. If the Recipient information is correct and the Requestor is ready to submit the request, clicking the “Submit” button at the bottom of the page will submit the request for approval.
Figure 5: Request Form Prepared for Submission
A confirmation box will appear once the request is submitted. Clicking “OK” will close the window.

![Figure 7: Submission Confirmation](image)

Email Confirmation of Submitted Request

Once the request is submitted for approval, the Requestor will receive an email notification containing the pertinent request details confirming the successful security access request submission. The Recipient of the access for which the request was submitted will also be copied on the email. See Figure 8 below.
Dear Mike The Tiger,

Your Workday security access request for Tiger, Mike The was successfully submitted. The request details are below:

Stage: Request Submitted
Requestor: Tiger, Mike The
Recipient: Tiger, Mike The
Request Reference Nbr: 2462

Items Requested:

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<th>Module</th>
<th>Role</th>
<th>Org Type</th>
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<tr>
<td>REMOVE</td>
<td>Core - HCM Manager Supervisory FA - ITS - FSS - Admin - Development Services (SO001365)</td>
<td></td>
<td></td>
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</table>

Comments:

This role should never have been given.

This is official correspondence from Louisiana State University

Any security questions regarding this security access request should be sent to fsssec@lsu.edu. In order to view Security Access Request user guides and tutorials, please click here.

Explanation of Required Approvals

There are three stages at which the request will have to pass through in order to obtain various required approvals:

1. **Manager stage** – the user’s Manager or the Manager’s Delegate that was chosen by the Requestor on the request (all possible choices would be given in the dropdown box).

2. **Department Head stage** – the individual(s) responsible for the role organizations selected on the request. A unit’s Delegate, Cost Center Manager, or Department Head (in this order) will be used to satisfy this stage’s approval requirement. For example, if access was requested for both the role “Cost Center Manager” for Cost Center CC00440 and the role “Cost Center Manager” for Cost Center CC00408, then the cost center manager for Cost Center CC00440 as well as the cost center manager for Cost Center CC00408 (if no Delegates for the Cost Center’s cost center manager exist) would have to approve the requested roles for their respective cost centers on the request. If no Delegate or Cost Center Manager exists for that particular organization, then the Department Head would have to approve the roles requested.
3. **Module Administrator stage** – the individual appointed as the Module Administrator for the module to which the requested role belongs. For example, the “Cost Center Manager” role is found under the module of Accounting - FIN. Therefore, the Module Administrator for Accounting - FIN would have to approve all of the roles requested that fall under Accounting - FIN on each request (unless the Module Administrator has chosen to allow particular roles for modules they are responsible for to be by-passed at the Module Administrator approval stage if the Recipient’s Manager and Department Head has approved).

Each stage besides the Manager stage could potentially require multiple approvers prior to allowing the progression of the request to the next stage. Every approver at all stages will receive an email with a summary of the request, a link to click in order to view the request, and an explanation of how the request can be approved by simply replying to the email. User-based roles and role-based roles at the Company or higher levels will not require a Department Head approval but will always still require a Manager and Module Administrator approval.

The procedure will automatically recognize requests that have one individual fulfilling multiple roles within the same request (i.e. one individual is the user’s Manager and the Module Administrator for a system to which a role requested belongs) and will only require that individual to approve once. The one approval will satisfy both stages for which the individual’s approval is needed.

Once all three stages’ approvals are satisfied, the responsible security officer will automatically receive the request and will load the necessary access. The Requestor will receive an email confirming which access requested was successfully approved or disapproved and actually put in place by the security officer.

**Subsequent Request Tracking**

The Requestors and Approvers of security access requests that have been submitted can track the progress of any requests by visiting their LSU BPM Portal by clicking on “LSU BPM” after logging in to myLSU as seen in Figure 10.

See Figure 11 below. Once in the LSU BPM Portal, you will notice two main sections: “To Do List” and “Watch List”. The To Do List contains all requests for which the person visiting the portal needs to action with either an approval or disapproval decision. The section contains the Process Name of the request, the Stage name for the stage in which the request is sitting, and the Start Date the request was initiated. There is also a link in underlined blue font named “Process Request” which, once clicked, allows users to view the request in order to approve or disapprove it.
The second main section is entitled “Watch List” and contains all requests for which the person visiting the portal has either originally initiated or previously approved. These requests can be clicked on in order to view their progress if still in process or to view the final details if the request is completed or cancelled. Requests will remain on the Watch List for 90 days after the request is completed or cancelled and will then subsequently be archived and removed from the list.

See the LSU BPM Introduction link on the Financial Systems Services website to learn more about the LSU BPM Portal.