



# Requesting Security Roles



*This Requesting Security Roles Tip Sheet is for those who are responsible for requesting and/or approving security access changes for their institutions. You must be assigned the Finance, HCM, Learning, or Tech Security Requester/Approver Role to access this task.*

## Initiate the Request

1. From the Workday navigation menu, type Create Request and select **the Create Request task**.
2. In the Request Type field, choose the appropriate request type from the drop-down menu.

**Note:** The available request types are based on your assigned Workday role.

3. Select **OK** to open the request questionnaire.

## Provide Request Details

1. In the **On Behalf of** field, enter the name of the individual needing access.
  - If left blank, the request defaults to the person submitting it.
2. In the **Date** field, select the calendar icon and choose the desired access implementation date.
3. From the **Requester's College** drop-down menu, select the associated college.
4. In the **Manager** field, enter the name of the requestee's manager.

## Specify Access Requirements

1. Provide details in the following fields as applicable:
  - **(Optional) Object-Specific Access:** Specify particular tasks or objects (e.g., "CR1157" or "Create Expense Report for Worker".)
  - **(Optional) Access to Be Copied:** Indicate if access should match an existing user (e.g., "Same access as Jane Doe").
  - **(Optional) Role Request:** Specify the role being requested (e.g., Business Asset Analyst for CNMI).
2. In the **Requesting to Add or Remove Access** field, indicate whether access should be granted or removed.

3. In the **Employee Type** field, select whether the individual is an **Employee** or **Non-Employee**.
4. (*Optional*) After completing the questionnaire, add any additional comments or attachments related to the request.

## Submit and Approval Process

1. Once all applicable fields are completed, select **Submit** to send the request for approval.
  - The request will be routed to the manager of the individual requesting access.
2. The manager will receive the request in their **My Tasks** for approval.
  - **Approve**: Moves the request forward to the next stage in the process.
  - **Send Back**: Returns the request to the submitter for revisions.
  - **Deny**: Terminates the request entirely.
3. Once the manager approves the request, it is sent to the **school's functional lead**, who will review and approve it in **My Tasks**.
4. Upon approval by the functional lead, the request is submitted to the **CHESS ESS team** for final review.
5. After the final review, the requestor and their manager will receive a **confirmation notification** regarding the outcome of the request (approved or denied). Approval finalizes the review process.