Background

User-based security groups in Workday are generally used for system maintenance, configuration, and administration activities (such as Security Administrators) that are performed centrally. They are unique in that they are assigned directly to specific users (vs. role-based security groups which are assigned to positions), and they are not constrained to specific rows of data for the domains that are enabled for the security group, which are generally performed in a central department. Because user-based security groups are not assignable roles, they cannot be requested using the Workday Assign Roles business process. This document outlines the process for requesting and approving user-based security assignment.

Process

Appendix A: *Workday User-Based Security Groups* is a list of User-Based Security Groups, which identifies both a Finance Role Advisor and a Role Steward for each Finance, Payroll, or Shared user-based security group. Finance central users who believe they need access to one of these user-based security groups should speak with the accountable Finance Role Advisor to help them determine if a user-based security group will meet the stated business need, and if it would be appropriate to request direct access to its functions.

- If a user-based security group assignment is determined to be appropriate, the Finance Role Advisor will initiate a Salesforce case to fss@yale.edu for Finance or Shared roles, and employee.services@yale.edu for HCM, Payroll, and Academic security groups.

- The request will route to the appropriate Role Steward(s), who will either approve or deny the request.

- If approved, FSS or Employee Services will assign the security group and notify the user, the Finance Role Advisor, and Finance Role Steward when it is complete.

Requests for access to security groups that are categorized as **Shared** in the module column will also be routed for approval through employee.services@yale.edu.

Removal of User-Based Security Groups

All user-based security groups are **automatically** removed when a person is terminated from Yale. They are also reviewed by a Security Configurator when a worker's job profile or position ID is changing.

Review of User-Based Security Group Assignments

Role stewards will perform an annual review of all user-based security groups assignments in April of each year. Finance Business Solutions will facilitate the annual April review process by distributing the list of role assignments to role stewards. Stewards may also review assignments more frequently, at their discretion.