



Workday@Penn

Workday Security Roles and Training Requirements

Senior Business Administrators
September 27, 2023

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Agenda

- Removal of Security Roles from Individuals with No Activity
 - View-Only Security Roles
 - Training Requirements Policy Update
 - Q&A
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This Year's Focus on Security

Goals

- Enhance the experience of those who have robust Workday roles
 - Tighten the compliance, training, and experience requirements
 - Improve the accuracy rate of Workday business process outcomes
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Removal of Security Roles

- Collaboration with lead security partners to confirm action on initial list
- Security roles, no activity in the past 6 months
- Options provided:
 - Remove Security Role
 - Keep Security Role
 - Change role to HR Comp View
 - Change role to General Worker View

Security Role Holders

| Security Role | 2022 % Change | 2023 % Change | 7/1/2021 | 7/1/2022 | 7/1/2023 |
|-----------------------------|---------------|---------------|----------|----------|----------|
| Academic Chair/Manager | 0% | -3% | 327 | 328 | 319 |
| Academic HR Partner | 5% | 5% | 73 | 77 | 81 |
| Academic Partner | 9% | 5% | 297 | 325 | 340 |
| Budget Partner | 7% | 9% | 160 | 171 | 187 |
| Costing Allocations Analyst | 129% | 100% | 21 | 48 | 96 |
| HR Analyst | 11% | 7% | 644 | 716 | 769 |
| HR Partner | 14% | 10% | 162 | 184 | 202 |
| Manager | 15% | 11% | 5497 | 6321 | 7025 |
| Primary Recruiter | 51% | 17% | 1955 | 2948 | 3441 |
| Recruiting Coordinator | 16% | 10% | 663 | 767 | 845 |
| Timekeeper | 6% | 7% | 574 | 610 | 651 |

AVG Assignments Per Organization

| Security Role | 2022 % Change | 2023 % Change | 7/1/2021 | 7/1/2022 | 7/1/2023 |
|-----------------------------|---------------|---------------|----------|----------|----------|
| Academic Chair/Manager | 0% | 0% | 1.1 | 1.0 | 1.1 |
| Academic HR Partner | -3% | 11% | 8.1 | 7.9 | 8.7 |
| Academic Partner | 14% | 7% | 3.3 | 3.8 | 4.1 |
| Budget Partner | -8% | -12% | 3.7 | 3.4 | 3.0 |
| Costing Allocations Analyst | 14% | 3% | 1.6 | 1.8 | 1.9 |
| HR Analyst | -10% | -2% | 5.2 | 4.7 | 4.6 |
| HR Partner | -14% | -6% | 3.5 | 3.0 | 2.8 |
| Manager | 1% | 0% | 1.0 | 1.0 | 1.0 |
| Primary Recruiter | 5% | -3% | 1.6 | 1.7 | 1.6 |
| Recruiting Coordinator | 13% | 17% | 3.7 | 4.2 | 4.9 |
| Timekeeper | -6% | -6% | 4.1 | 3.8 | 3.6 |

View-Only Security Roles

HR Comp View

- Accesses same data that HR Analyst can see
- No ability to initiate or approve
- Must provide business justification

General Worker View

- Accesses only employee demographics, contact information, and academic appointments in Workday
- No ability to initiate or approve
- Must provide business justification

Streamlining...

Managers Matter in Workday

- The ability to initiate **one-time payments** is *removed* from the role of manager
- Small impact



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|--|---|---|---|--|
|  Compensation |  Confidentiality and Security |  Dashboards and Reporting |  Delegation |  Learning |
|  Onboarding |  Recruiting and Hiring |  Payroll |  Performance Management | <p>Visit the Workday@Penn website for detail</p> <p>www.workday.upenn.edu/home/your-workday/managers</p>  |
|  Staffing Events |  Termination and Resignation |  Time Off |  Time Tracking | |

Update to Training Requirements

Effective October 1, 2023

Policy: <https://www.workday.upenn.edu/home/toolbox/policies/workday-training-requirements>

What's Changing?

Individuals with security roles will **not** be able to initiate key business processes **until the assigned training is completed.**

- Add Additional Job
- Change Job
- Create Job Requisitions
- Hire
- Manage Period Activity Pay
- Request Compensation Change
- Request One-Time Payment
- Terminate

** The user will receive a hard stop when trying to submit. The task will remain in their inbox until they have access to submit.

What's Not Changing?

- The ability to view data and provide approvals **will not be impacted.**
- Individuals who have not completed the training associated with their security role within **30 days** will have their security revoked by Workday Operations.



Please submit additional questions to nbrac@upenn.edu