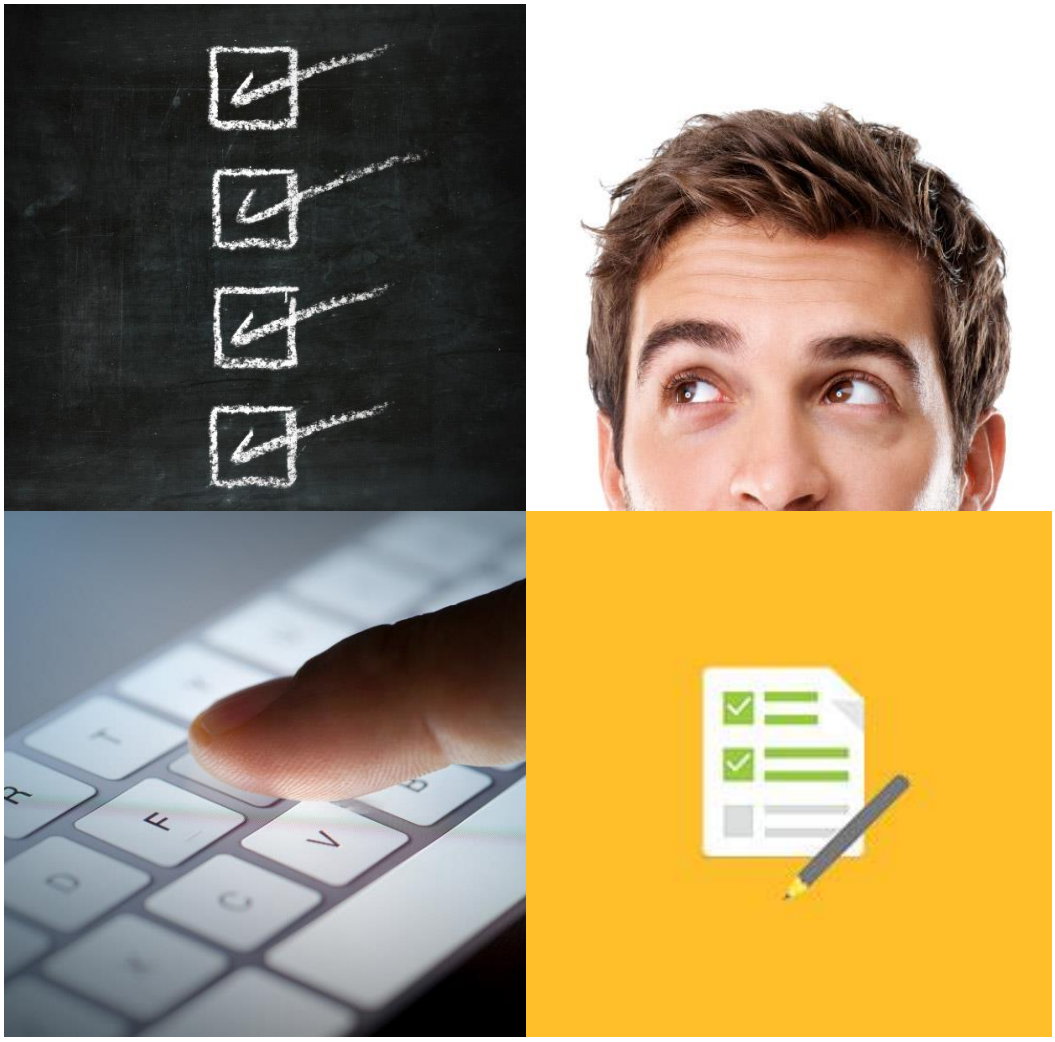
workday. EDUCATION



CONFIGURABLE SECURITY FUNDAMENTALS

Course Manual and Activity Guide

CONTENTS

CONFIGURABLE SECURITY FUNDAMENTALS

In this course you will work through hands on activities that are designed to build a foundation of knowledge in Workday's Configurable Security model. You will gain an understanding of the various types of Security Groups including User-based, Role-based and Job-based. You will also learn how to navigate through Workday's Functional Areas, Domains and Sub-Domains. Lastly, you will edit both Domain Security Policies as well as Business Process Security Policies.

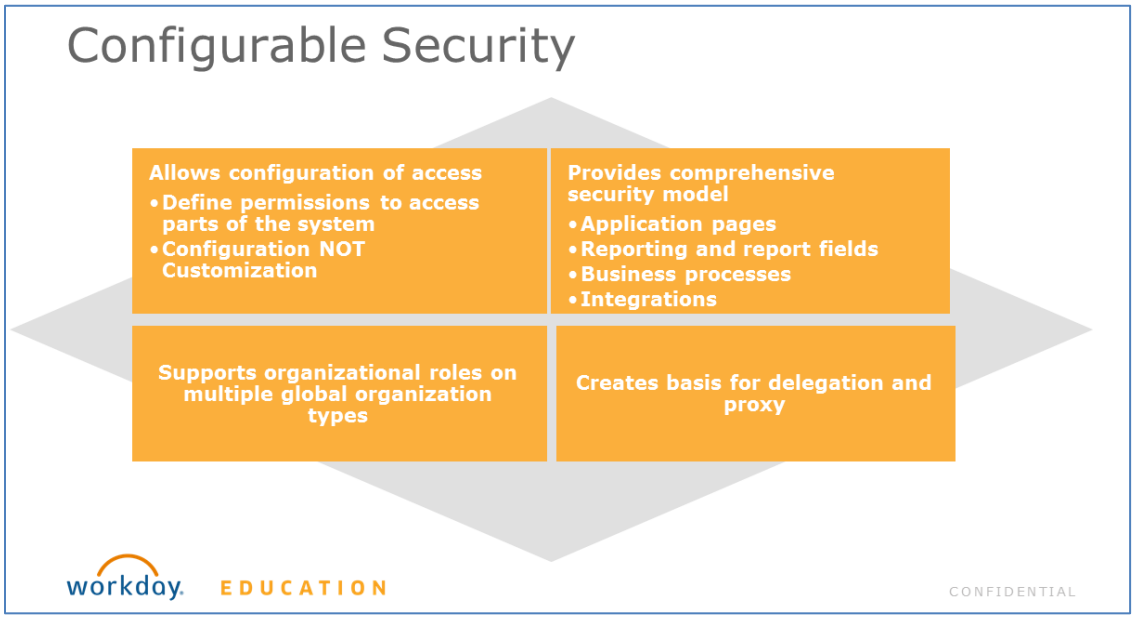
AGENDA:

- Security Landscape
  - Functional Areas, Domains and Sub-Domains
  - Domain Security Policies
  - Business Process Security Policies
- Security Groups
  - Delivered & Assigned Security Group Types
  - User-Based Security Groups
  - Role-Based Security Groups
  - Service Center Security Groups
  - Job-Based Security Groups
  - Segment Security Groups
  - Membership Security Groups
  - Aggregation Security Groups
  - Intersection Security Groups
  - Level Based Security Groups
- Security Tips
  - Recommendations
  - Managing Workforce Security Assignments
  - Security Configuration Restrictions
  - Reports and Other Tools

SECURITY LANDSCAPE

WHAT IS CONFIGURABLE SECURITY

Workday provides a configurable security framework enabling customers to control view vs. modify access to the Workday application via security groups and security policy updates. Workday's security framework supports your organizational structures, roles, global models, and is integrated across the application, from the user interface pages, to reports, integrations and business processes. Workday security configurations are tenanted and update safe and provide a comprehensive model across the application.



This class focuses on the configurable security framework where you can authorize access to the application via security groups and security policy updates. There are other areas of security that provide additional controls that are not in the scope of this class, but are important for your greater security strategy and implementation.

Please see related documentation and available resources around:

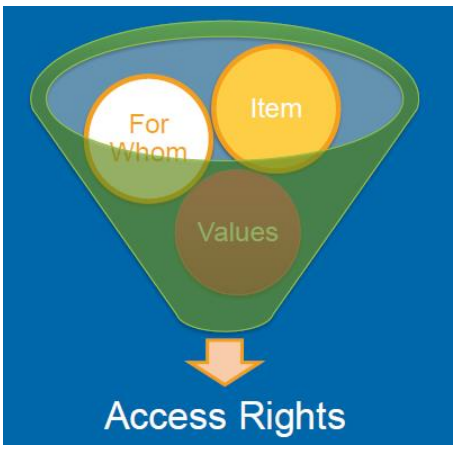
- Authentication
- Audit
- Data Masking
- Data Purging

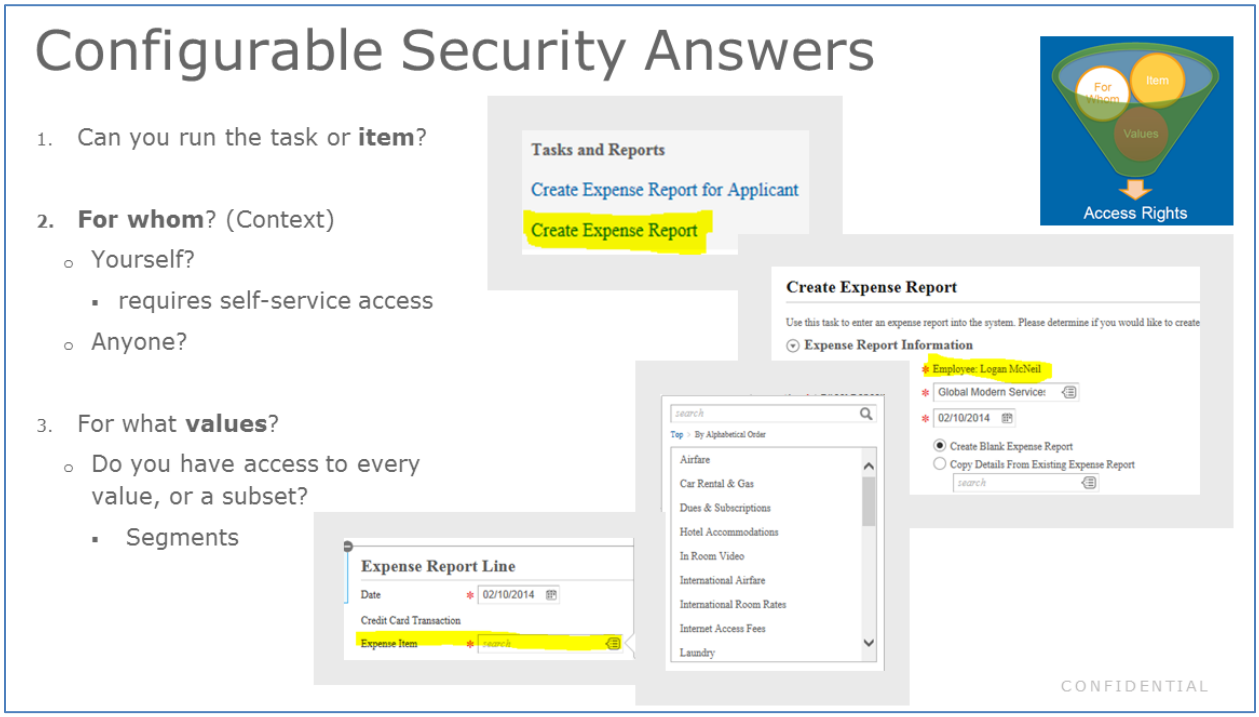
Configurable Security helps to answer questions such as:

1. Can a given user run a task or get to a given secured **item** in Workday? (e.g., a delivered report or task)

2. Once there, what target instances does the user have access to for that item? "**for whom**" can they see data? (e.g., can the user see data for all workers when running a report about workers, or create an expense report for anyone?)

3. Can you segment the actual items or **values** a user sees? For what items/lines/values?





Let's now take a closer look at the security framework.

SECURITY LANDSCAPE

FUNCTIONAL AREAS, DOMAIN AND BUSINESS PROCESSES

As you look to configure access in Workday, it is important to understand how the system is packaged and delivered and how you can configure access to it. At the highest level, Workday delivers the application in **functional areas**. Functional areas can include such areas as: Staffing, Benefits, Core Compensation, Financial Accounting or Procurement. Each functional area is then broken down into **Domains** and **Business Process Types**.

Domains are collections of items that share the same security. These items can include tasks, delivered reports, report data sources or custom report fields and web service operations and tasks.

- ✓ **Workday determines the secured items within each domain.**
- ✓ **You cannot change what delivered items are in what domains.**

Domain Security Policies

Every domain has its own domain security policy. It is in these domain security policies that you can configure which security groups have access to the items in the domain. Access can be configured as view only, or view and modify access. For web service operations secured in a domain, the access is configured with Get vs. Put permissions.

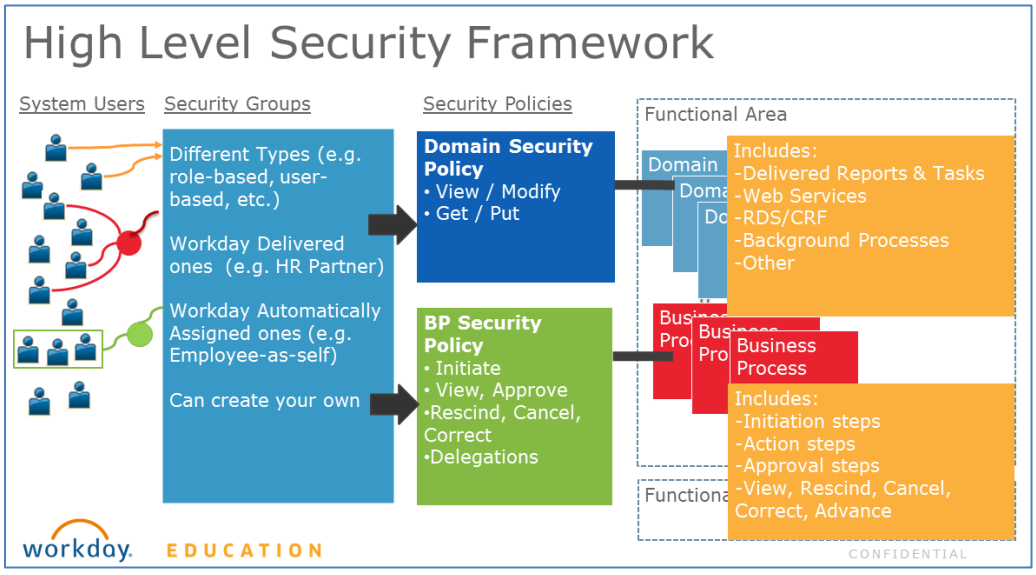
- ✓ **Access is configured at the domain level, not item-by-item. Users with access to a domain will have access to all items secured in that domain.**

Business process types represent the events or transactions in Workday that can be automated using Workday's business process framework.

Business Process Security Policies

Each business process type has its own security policy. It is in these business process security policies that you can configure which security groups can for example, initiate the business process, or do actions steps, or approve, rescind, cancel or correct the business transaction.

Lastly, users are identified via security groups and security groups are configured in security policies.



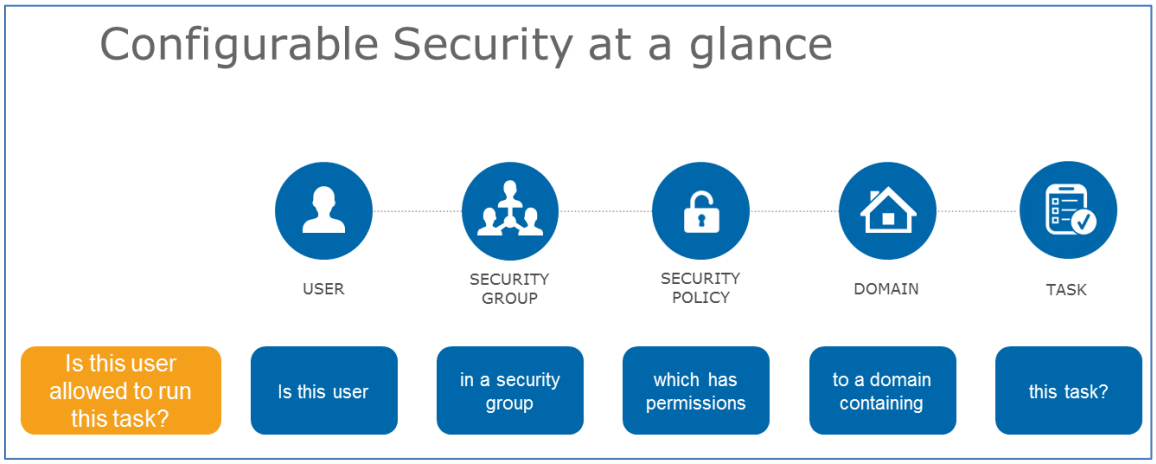
Workday's configurable security framework allows you to say **who can do what**.

Configurable security acts as a bridge between Workday-owned metadata and customer-owned tenanted access to functionality. By configuring domain or business process security policies with needed security groups, customers can configure the bridge between Workday's what and customers' who.

- ✓ **You can** configure access to domains by configuring domain security policies with needed security groups.
- ✓ **You can** configure access to business process types by configuring business process security policies with security groups
- ✓ **You can** create security groups

- ✓ **You cannot** change what delivered items are in a domain.
- ✓ **You cannot** add new BP types

As an example, to see if a user has access to a given task or item, that user must have a security group that is configured with permissions in the security policy that secures that item.



DOMAIN SECURITY POLICY

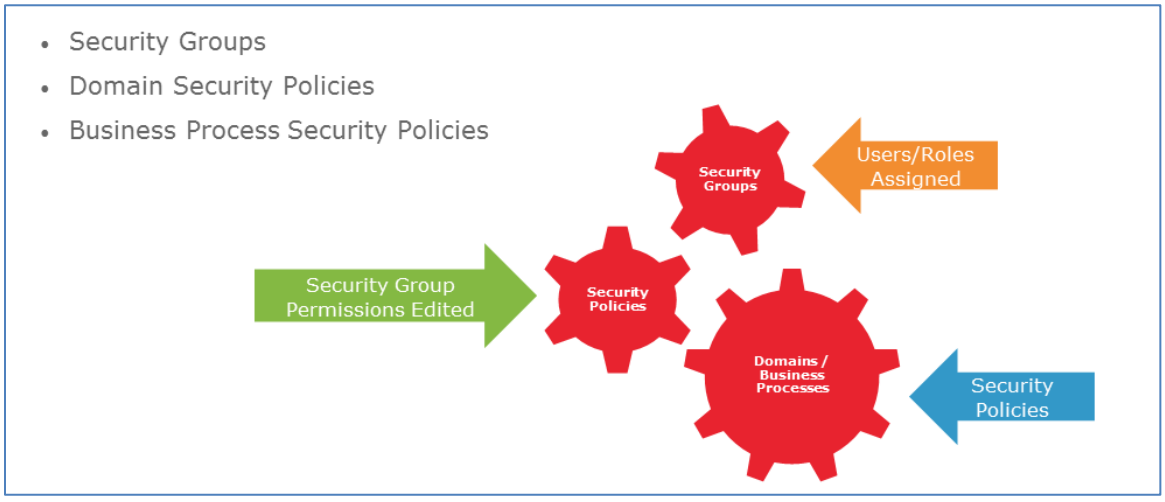
Every domain has its own domain security policy. Domain security policies define what security groups have access to the securable items in that domain.

BUSINESS PROCESS SECURITY POLICY

Business process security policies are collections of securable items related to business processes, including initiation steps and actions steps. They also are where you specify permissions for actions on events, for example the ability to view, approve, rescind, cancel, and correct a given event.

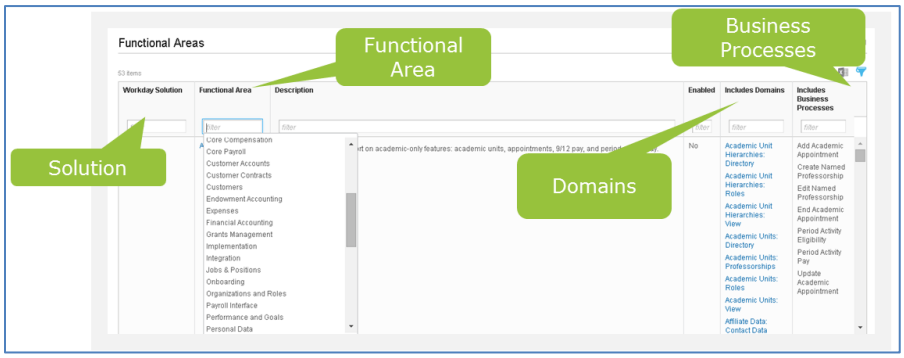
SECURITY GROUPS

A security group allows you to identify a set of users to grant access in Workday. Users can have many security groups on their Workday account. A user must have access to a domain or business process security policy via at least one permitted security group in order to access secured items in that policy.



THE FUNCTIONAL AREAS REPORT

Workday provides a helpful 'top down' report called the **Functional Areas** report. This report will show for a given Workday Solution, the functional areas and the domains and business process types for each functional area. You can also see if a given functional area is enabled in your tenant or not. To enable or disable a functional area, run the **Maintain Functional Areas** task. From this report, you can also drill into the details of a given domain to see the secured items and even the security policy.



ACTIVITY 1 – NAVIGATE FUNCTIONAL AREAS

Scenario: In order to view the manner in which Workday is broken down, you will logon as Logan McNeil, the Security Administrator, to run the Functional Areas report. You will also use the View Domain report to look at the details for a particular Workday Domain.

OVERVIEW

As the Security Administrator Logan McNeil will perform the following actions:

1. View Functional Areas
2. View Domain
3. View Domain Security Policy

TASK 1: RUN FUNCTIONAL AREAS REPORT

As Logan McNeil (lmcneil)

1. From the search box, search for the string '*fun area*'
2. Click on the **Functional Areas** report
3. How many business processes are in the **Expenses** functional area? _____
4. How many domains are in the **Expenses** functional area_____
5. Click on the **Manage: Expense Report** domain to *view the domain*:

6. How many total items are secured in this domain? _____
7. How many reports & tasks are secured in this domain? _____

8. How many web services are secured in this domain? _____

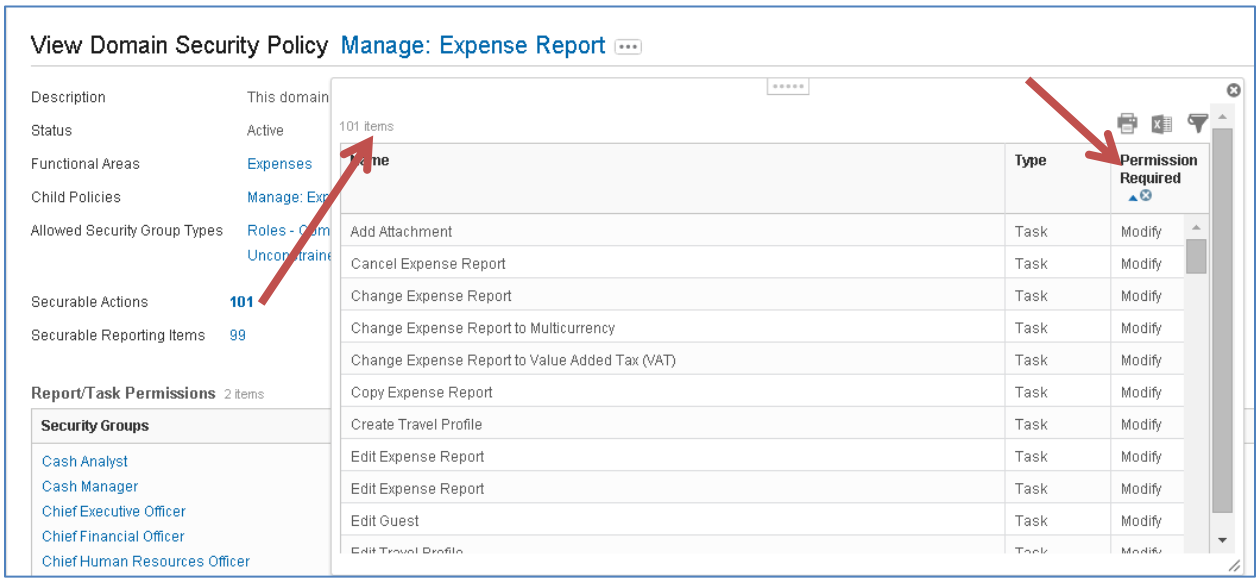
9. Click on the icon to view the **Domain Security Policy**

10. How many security groups have View only access under the Reports/Tasks Permissions?_____

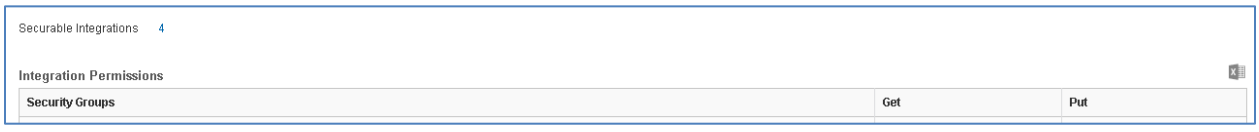
11. Which Security Groups have View and Modify under the Reports/Tasks Permissions?
    _____

12. Click on the **Securable Actions** link to see the list of securable actions. Sort the actions by *Permission Required* to see which actions require modify permissions vs. view. Users with security groups configured with modify permissions will be able to access these actions in Workday.

    What permission (View or Modify) would a user need to run the delivered action*: Average Expense Report Total*? _____



13. How many security groups have Get and Put access to the securable integrations (i.e. the 4 web services) in this security policy (hint: scroll down and see the Integration permissions)
    _____



(End of Activity)

A CLOSER LOOK AT SECURITY POLICIES

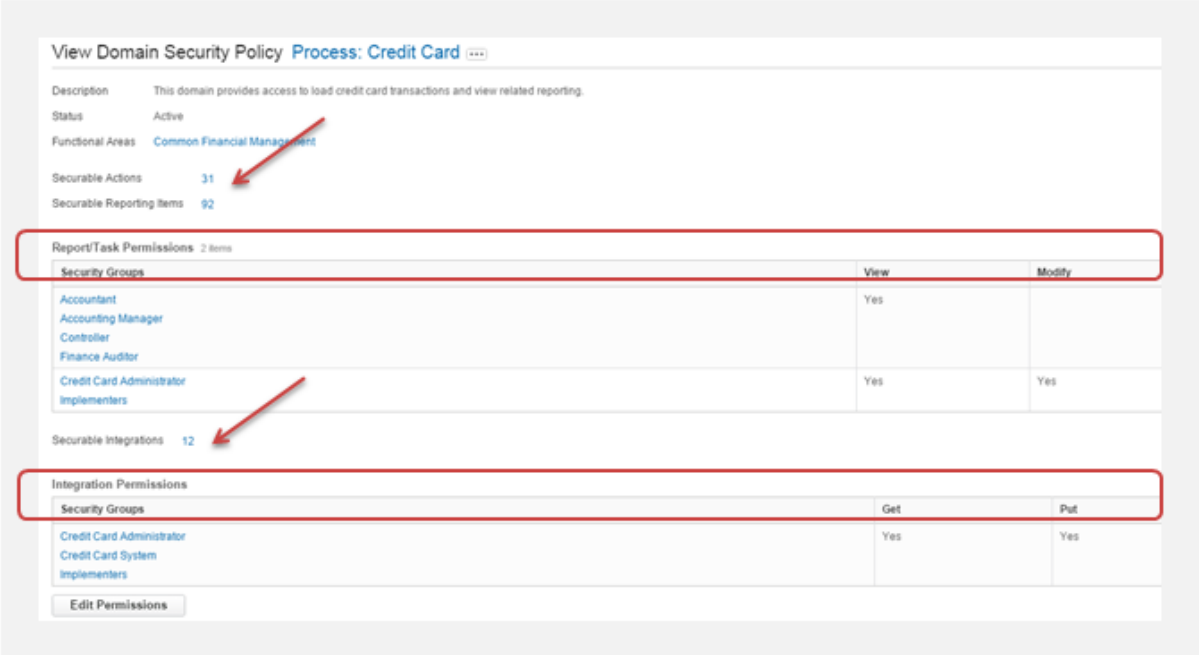
Securable items are grouped into domains and business processes, and each grouping has a corresponding domain or business process security policy. These groupings are predefined and you cannot change them. You can edit which security groups can access the securable items in a domain or business process, but you cannot edit the securable items in a policy or delete a policy. Each functional area contains security policies for items such as actions, reporting items, or business process actions.

There are two types of security policies: domain and business process.

Let's take a closer look at domain security policies.

DOMAIN SECURITY POLICIES

Domain Security Policies are the bridge between Domains and Security Groups. Domain Security Policy configurations involve two sections: **Report/Task Permissions** and **Integration Permissions**. You can add or remove security groups and grant security groups View only or View and Modify access to the reporting items and securable actions. If the domain contains web services, they will show as securable integrations whereby you can configure needed security groups with the Get ("view") or Put ("modify") access under integrations permissions.



Some secured items may be included in more than one domain security policy. Workers who are granted different levels of access permission in different domains get the most access granted.

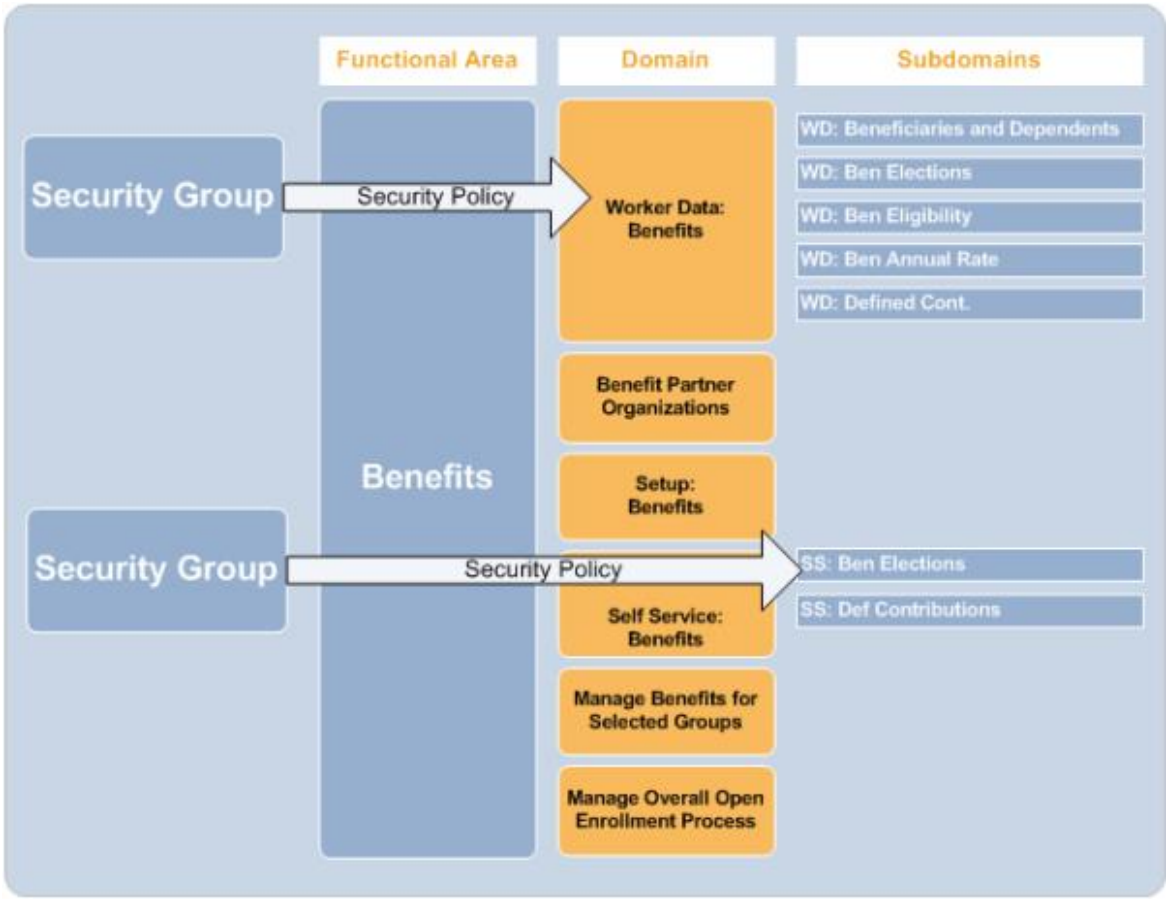
INHERITANCE IN DOMAIN SECURITY POLICIES

Some Domain security policies have a hierarchical relationship with child policies, which can **inherit the security policy settings of the parent.** There is no inheritance for business process security policies.

The parent security policy is actually a master control that allows you to set which security groups have access permissions in all the children. If you add or remove a security group in the parent policy, the change appears in all the children.

You can turn off inheritance in any child security policy by editing it using the **Override Parent Permissions** option. After that, changes made in the parent no longer have any effect in that child policy. Editing a child security policy does not affect inheritance in any of the others. You can restore inheritance in a child policy by clicking the **Use Parent Permissions** button.

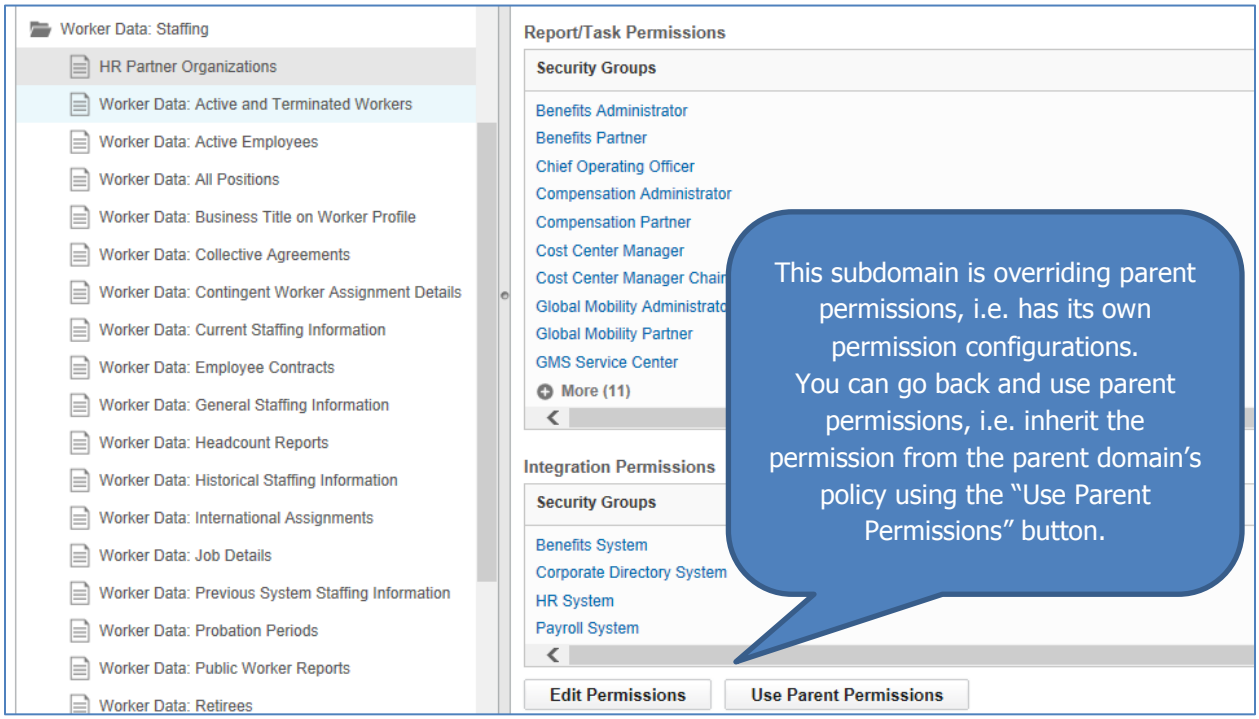
Whether a child security policy is currently inheriting permissions from its parent is shown in the Status field, under the Security policy title. If it is inheriting, the status says "Active - Inheriting parent permissions".

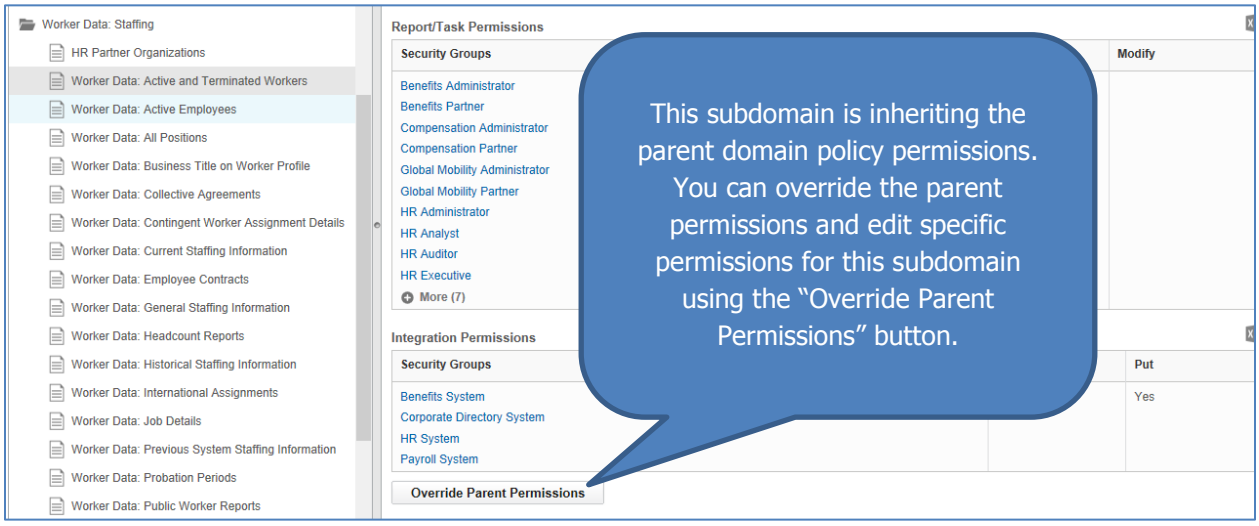


SECURITY POLICY REPORTS

The **Domain Security Policies for Functional Area** report provides a description of each domain, along with access to any sub-domains. From here you can access security policies. Domain security policies can be configured at either the domain or sub-domain level. Domain Policies are inherited by sub-domains, but inheritance is broken by editing the sub-domain policy.

You can see if a subdomain is inheriting or overriding its parent domain permissions. This information is visible in the domain security policy status and you can also see the option to "Override Parent Permissions" or "Use Parent Permissions".





ACTIVITY 2 – NAVIGATE DOMAIN SECURITY POLICIES

Scenario: You will logon as Logan McNeil, the Security Administrator, to run the Domain Security Policies for Functional Areas report.

OVERVIEW

As the Security Administrator Logan McNeil will perform the following actions:

1. Review Domain Security Policies

TASK 1: RUN DOMAIN SECURITY POLICIES FOR FUNCTIONAL AREAS REPORT

As Logan McNeil (lmcneil)

1. Search for the string '*dom sec fun*'
2. Click on the **Domain Security Policies for Functional Area** report
3. Click the icon to select the **Core Compensation** functional area
4. Click the **OK** button
5. Click on the **Worker Data: Compensation** super domain
6. How many securable actions are in the Worker Data: Compensation Super-domain? ___
7. How many securable reporting items are in the Worker Data: Compensation Super-domain? ____
8. How many security groups have view and modify access? _____
9. How many Sub-domains exist in the Worker Data: Compensation Super-domain? _____
10. How many subdomains are inheriting the permissions from the Worker Data: Compensation domain? _____

(End of Activity)

BUSINESS PROCESS SECURITY POLICIES

A business process security policy applies to a single business process type. It controls access to the securable items in the business process by specifying which security groups have permission to access each securable item. The securable items in a business process security policy are:

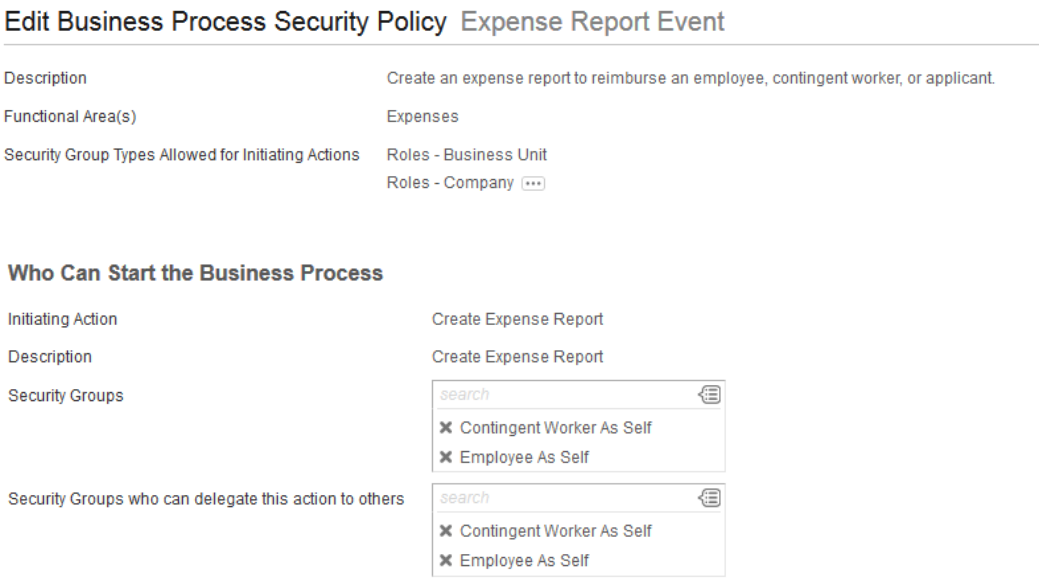
- Initiation steps
- Action steps
- Approvals
- Actions on the process: view, rescind, cancel, and correct

Business process security policies contain such securable items as initiation steps, step actions, and actions on the process as a whole: view, approve, rescind, cancel, and correct. A business process security policy also allows you to specify whether the business process can be delegated to others.

If you copy a business process definition, all definitions of the same business process type, will share the same security policy. **There is one business process security policy per business process type.**

Business Process security policies look very different than domain security policies. They include several sections:

- Who Can Start the Business Process (Initiating actions)
- Who can do Action Steps in the Business Process (Allowed Actions)
- Who can do Actions on Entire Business Process (View, Approve, Rescind, Cancel, Correct, Advance)
- Other Policy Restrictions & Settings



Who Can Do Action Steps in the Business Process

Action Step: Review Expense Report

Security Groups: search
- Expense Partner
- HR Partner

Who Can Do Actions on Entire Business Process

Action: View All

Security Groups: search
- Accounting Manager

Action: Approve

Security Groups: search
- Accounting Manager
- Alternate Approver

Action: Correct

Security Groups: search
- Accounting Manager
- Implementers

Note: Security Groups on the Correct policy are also granted 'View All' access for transactions still possibly correctable.

Action: Reassign Tasks

Security Groups: search

Note: Security Groups assigned to the Business Process Administration domain will also be able to reassign tasks.

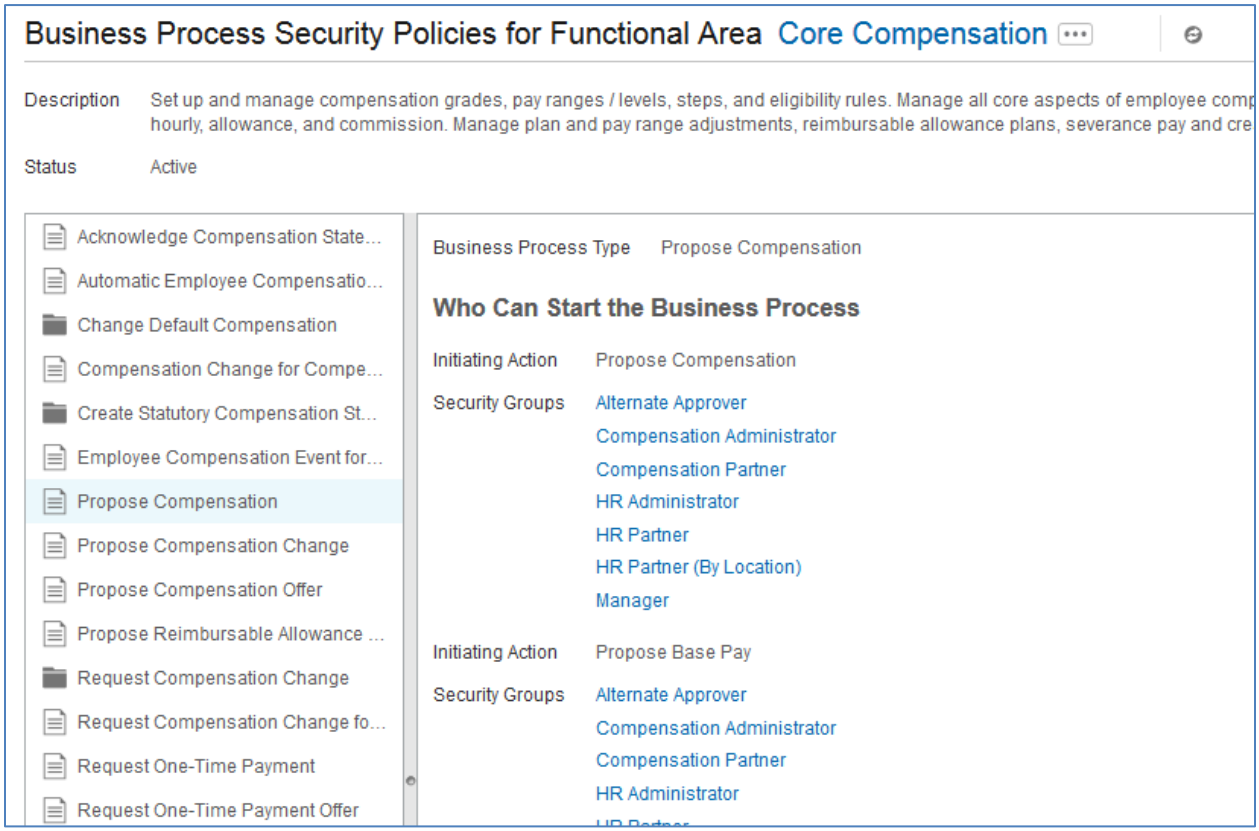
Policy Restrictions

- [x] Allow Business Process Delegation
- [x] Hide Comments from Worker
- [ ] Hide Details from Worker
- [ ] Disable Comments

Attachment Settings in BP Toolbar

- [ ] Allow Attachments within Emails

The **Business Process Policies for Functional Area** report provides a description of the business process. It shows all business processes and sub-processes. From here you can view and edit security policy permissions. Business processes can have sub processes. Each process has its own bp security policy. There is no inheritance of business process security policy permissions.

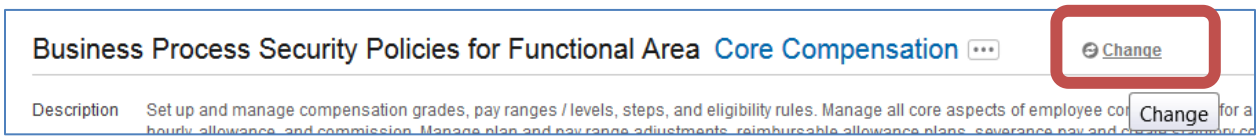


ACTIVITY 3 – NAVIGATE BUSINESS PROCESS SECURITY POLICIES

Scenario: You will logon as Logan McNeil and run the Business Process Security Policies for Functional Area report to view Business Process Security Policies in a Functional Area

As Logan McNeil (lmcneil)

1. Search for the string '*bus sec fun*'
2. Click on the **Business Process Security Policies for Functional Area** report
3. Click the icon to select the **Core Compensation** Functional Area
4. Click the **OK** button
5. Click on the **Propose Compensation** business process.
6. What action(s) initiates this business process?_____
7. How many security groups can rescind a propose compensation event?_____
8. Rerun the **Business Process Security Policies for Functional Area** report by clicking the **change** icon



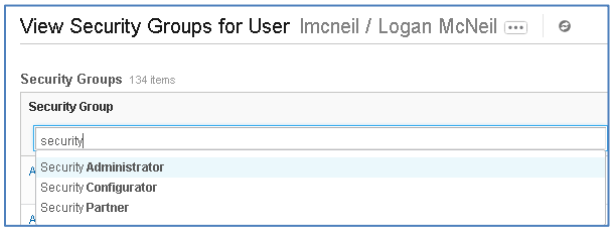
9. This time select the functional area: **Common Financial Management**
10. Which security groups can initiate a period close event?_____
11. How many security groups can view a period close event?_____

(End of Activity)

MANAGING SECURITY

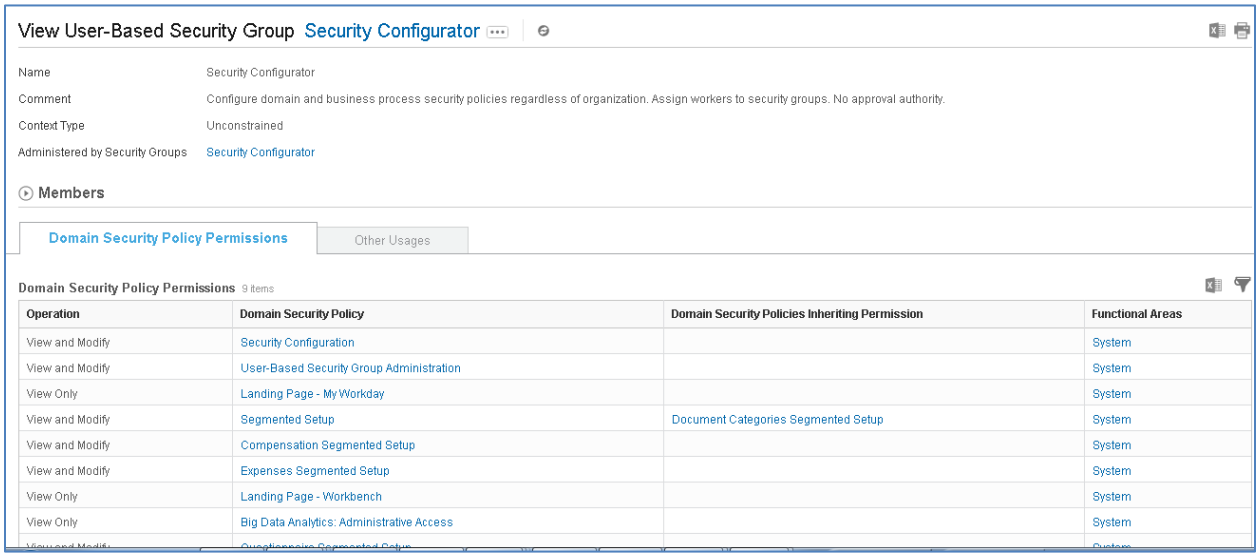
There are two main security groups that allow you to control who manages security in your tenant: **Security Configurator** and **Security Administrator.** The **Security Configurator** security group has greater access to such tasks as, creating security groups, modifying security policies and activating security in the tenant. The **Security Administrator** security group has access to tasks around maintaining Workday accounts, password rules and security assignments. You can either centralize or segregate these responsibilities amongst individual users by **assigning these security groups to the same or to different users**.

In our training tenant, Logan McNeil is assigned to both security groups.



*She is also a member of the Security Partner, role-based constrained security group. The **Security Partner** role-based constrained security group is a helpful way to decentralize security tasks to users by limiting their access to a given organization. More on role-based security groups later in this class.*

Run the **View Security Group** report to see details for each of these security groups. Remember that security groups are configured with access to domains and business process security policies. View each domain to see the secured items in the domain.



SECURITY PROFILES

Users in Workday can have many security groups on their security profile. These security groups can be:

- **Workday Assigned** (e.g. Employee-as-self, All Users)
- **Manually Assigned** (e.g. Report Writer, Finance Administrator)
- **Derived** (E.g. HR Partner, Expense Analyst)

Run: **View Security Groups for User** to see the security groups for a given Workday user

You can also test if a user is a member of a security group, using the report: **Test Security Group Membership**.

A user's access is a union of all of their security group permissions. A user must have access to a domain or business process security policy via at least one security group in order to have access to that area of Workday. Run **Security Analysis for Workday Account** to see a user's access at their account level, i.e. a union of all their security groups.

WORKDAY ASSIGNED SECURITY GROUPS

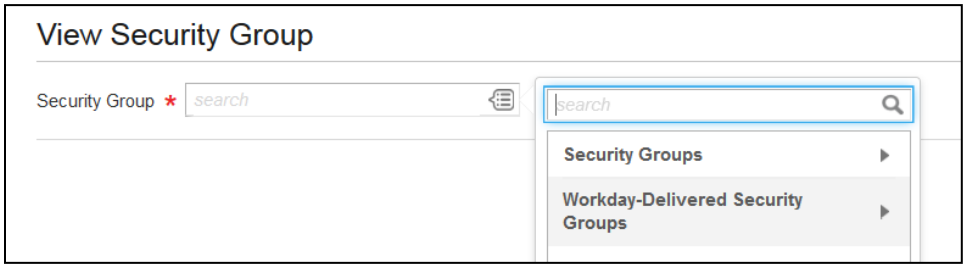
Workday delivers security groups as a starting point, including some security groups that are automatically assigned and cannot be changed. Membership in these Workday assigned security groups is automatically populated by Workday. You cannot create, edit, or delete these groups. Some examples of Workday assigned security groups are:

- All Contingent Workers
- All Employees
- All Project Members
- All Retirees
- All Terminees
- All Users
- Contingent Worker as Self
- Employee as Self
- Pre-Contingent Worker as Self
- Pre-Employee as Self
- Project Member as Self
- Retiree as Self
- Supplier Contact as Self
- Terminee as Self
- Implementers
- Initiator
- Manager's Manager
- Role Maintainer

For example, Pre-Employee As Self Security Access for Contingent Workers: Workday assigns a contingent worker who is being converted to an employee to the **Pre-Employee as Self** security group. This accommodates Onboarding tasks that the Pre-Employee needs to perform.

With every Workday update, there could be new delivered security groups that will be automatically assigned. Some recent examples include **Manager for Majority of Event** which is used only in employee reviews, and **Academic Affiliate as self**.

For a complete list of Workday delivered/assigned security groups, run View Security Group and select Workday Delivered Security groups.



STEPS FOR CONFIGURING SECURITY

The following graphic outlines the steps for configuring security. In order to grant a user access in Workday, that **user must be associated with a security group**. You can use delivered security groups or create your own as needed. **Security groups come in different types**: user-based, role-based, job-based, etc. Workday determines the security group types. You cannot create new types. **Security groups must then be configured in security policies**, domain and/or business process security policies. You get to configure and control what domain or business process security policies a security group has access to. When changes are made to a security policy, those changes are saved, but are pending until the **Activate Pending Security Policy Changes** task is run. Once you activate those changes, **Test, Test, and Test**!

1. Determine users and required access

- Plan what access users will need based on individual needs, positions, inclusion vs. exclusion...

2. Create Security Groups

- A security group is a collection of users

3. Attach security groups to Security Policies

- Security policies are tied to areas of the system and control permissions for:
  - Initiating a process
  - Action steps in a process
  - Approvals
  - Overall actions in a process
  - Reports and reporting fields
  - Setting up and modifying viewing data

4. Activate pending security policy changes

- Workday saves changes as inactive, pending changes until you activate them

5. Test changes

- Verify that the changes made do what you expected

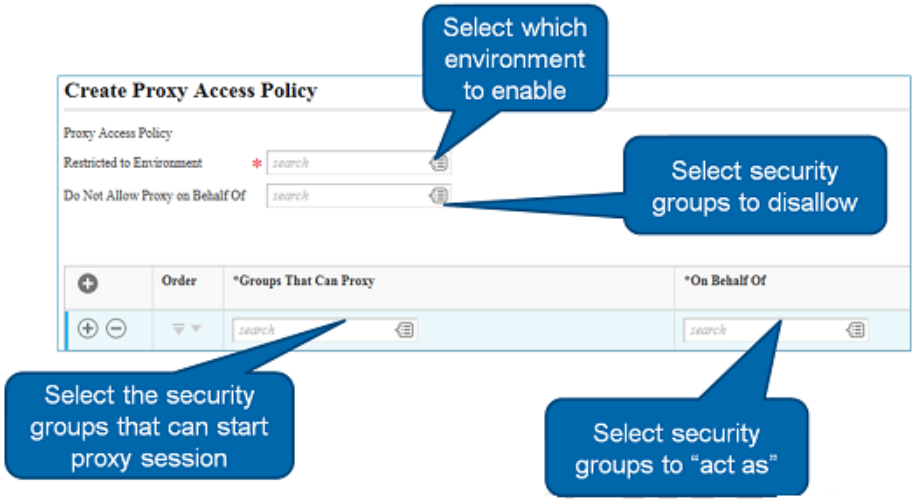
PROXY SESSIONS

Proxy Access Policies are a very useful mechanism for testing. Proxy access can be set up for use in any tenant environment *except* production. This security configuration is a real time saver when testing business processes or reports in your Sandbox or implementation tenants, because you don't have to log in and out as multiple users.

When you are signed into a proxy session, you can perform any action in Workday that the user on whose behalf you are authorized to do. Functionality that requires connecting to another service is not supported, including integrations, scheduled reports, business form printing, background conversions. Additionally, proxy users cannot access documents on the W: drive, Apple Push Notifications, email, notifications received through the user interface nor solutions.

Some key points and restrictions to keep in mind around proxy access:

- You can only configure one policy per environment
- Proxy access policies apply to non-production environments only
- Only unconstrained security groups can be configured with proxy access
- You cannot start proxy session when acting as a delegate
- No support for connecting to another service when in proxy mode.
    - Integrations
    - Scheduled reports
    - Business Form printing
- No access to W: drive documents, notifications when in proxy mode.



ORDER MATTERS

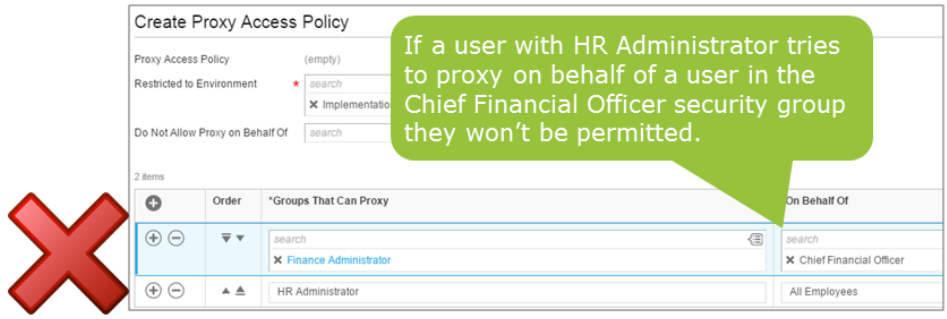
Workday evaluates the proxy access rules **in the order in which they are listed**, until a rule applies. Rules are checked in **order based on the user on whose behalf you are trying to proxy.** Once the first rule is found for that proxy on behalf of user, the system will check if you have a permitted security group to proxy on behalf of that user or not and stops.

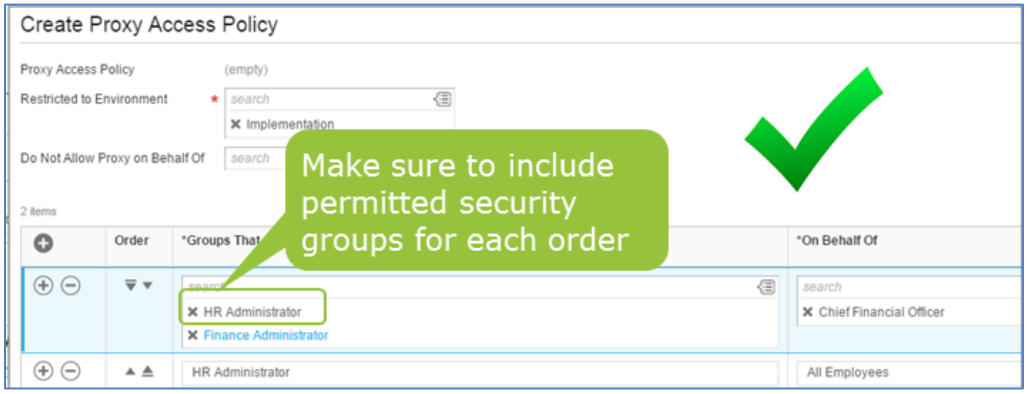
In the example below, if you have a requirement where:

- The **Finance Administrator** security group can proxy as the **Chief Financial Officer**.
- The **HR Administrator** security group can proxy as any employee (including the Chief Financial Officer).

When a user tries to proxy on behalf of a user in the **Chief Financial Officer** security group, the system will check the rules in order to see which rule would apply for proxying on behalf of the Chief Financial Officer security group.

Once the first rule is found that applies to proxying on behalf of the Chief Financial Officer, the system will then check to see if you have a permitted security group to start the proxy. If permitted, you can proxy. If not, you cannot proxy and no more conditions or rules are checked. In our example requirement, you must include HR Administrator in each rule order, else the HR Administrator would not be able to proxy as the Chief Financial Officer.





If you have more than one rule in your proxy access policy, it is important to include all security groups that can proxy on behalf of a given security group in all rules.

ACTIVITY 4 – CREATE PROXY ACCESS POLICY

Scenario: You will logon as Logan McNeil, the Security Configurator, to create a security access policy. This policy will allow you to test configurations without logging out and back in as multiple users

OVERVIEW

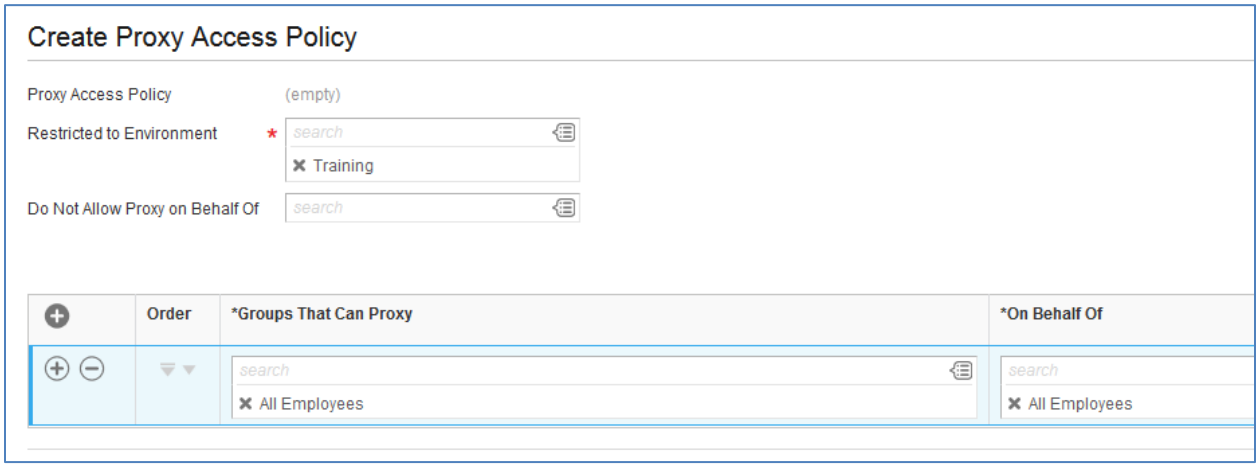
As the Security Configurator Logan McNeil will perform the following actions:

1. Create Proxy Access Policy
2. Test access

TASK 1: CREATE PROXY ACCESS POLICY

As Logan McNeil (lmcneil)

1. Search for the string '*create proxy*'
2. Click on the link to run the task to **Create Proxy Access Policy**
3. In the Restricted to Environment field, use the prompt icon to select **Training**
4. Select **All Employees** as **Groups That Can Proxy**
5. Select **All Employees** in the **On Behalf Of** field
6. Click the **OK** button Your policy should look like this:



Note: This 'wide-open policy' is for training purposes only and is not intended as a recommendation to be considered in your environment. Your policy will be much more restrictive.

TASK 2: TEST PROXY ACCESS

1. Search for the string '*start proxy*' and click the link to execute the task
2. In the **Act As** field, enter *Jack Taylor* and click **OK.** Notice you are now acting on behalf of Jack.

3. Search for the string '*stop proxy*' and click the link to execute the task
4. Check the confirmation box and click **OK.** Notice you are acting as yourself (Logan McNeil) again.
5. As we work through activities in class, you will have the option to start/stop proxy sessions or to log out/in as different users.

(End of Activity)

SECURITY POLICY CHANGE CONTROL

Security policy change control serves two purposes:

- It allows you to keep your security policies changes in a pending or inactive state until you are ready to deploy them. This can be a useful process for complex and far reaching security changes that require a coordinated activation.
- In the case of errors, it allows you to revert back to a previous version of your security configuration until you can resolve the error and reactivate.

Note: Security policy change control is not designed to keep alternate, valid security configurations. Once you revert from a security configuration, it is no longer available; you cannot inadvertently return to it.

HOW CHANGE CONTROL WORKS

Four elements make Workday security policy change control possible:

- Workday records the time of every security change.
- Workday evaluates security as of a timestamp, ignoring later changes, which are "pending."
- You can activate pending changes by time-stamping your current security configuration.
- You can tell Workday Security to activate a previous timestamp.

When you tell Workday Security to use a timestamp as the security evaluation moment, changes made after that timestamp don't take effect until you activate them. Use the **Activate Pending Security Policy Changes** task to create a new, current timestamp.

For example, if you activate security policy changes in March, June, and September and then discover a serious error in the September security configuration, you can activate the March timestamp using the **Activate Previous Security Timestamp** task. The changes from June and September are considered pending changes along with whatever new changes you make to fix the problems with the September security configuration. When you run the Activate Pending Security Policy Changes task, it creates a new timestamp and activates all of the changes made since March.

Workday no longer allows you to activate the September timestamp, which it deems a bad configuration. It appears in the **View All Security Timestamps** report, but no longer appears on the list for activating previous timestamps. We recommend that you edit the timestamp comment to indicate that it is not a valid security configuration.

Security timestamps look at domain and business process security policies and functional areas. They include changes made by adding or removing security groups from policies, enabling or disabling domains or functional areas, and whether business processes can be delegated.

Important: **Security timestamps are only for security policy configurations** and do not affect security group definitions, and user assignments. Changes to security groups always take effect immediately and remain as defined, even if you activate a previously time stamped version of security.

POLICY CHANGES

When you view a security policy, you can use the Edit Permissions button to add or remove, or otherwise make changes to the security groups that can access the securable items in the security policy.

When you change a security policy, for example by adding or removing a security group, Workday displays a message indicating that your changes have been saved but will not take effect until you activate security changes. This information is also reflected on the Edit Permissions page under the name of the securable item.

When you close the Edit Permissions page, the policy once again displays the security currently in effect. For example, when you delete a security group from a securable item and close the Edit Permissions page, the deleted group still appears on the Domain Security Policies for Functional Area report because the report displays the current state of security according to the timestamp that Workday Security is using to evaluate it. Your deletion is pending change and the report now includes the note "Has Pending Changes" for the affected security policy.

SECURITY CHANGE REPORTS AND ACTIONS

Use the Domain Security Policies with Pending Changes and the Business Process Security Policies with Pending Changes reports to see which domains or business processes have pending changes. This includes any changes made after the current security timestamp. Select View Pending Changes from the related actions menu on either report to get a list of changes for any individual policy.

The **View All Security Timestamps** report shows all timestamps, both currently active and previous versions. You cannot activate any timestamp with an entry in the Reverted To column. (This column does not appear until you activate a previous timestamp.)

Select **Security Timestamp** > **Edit** from the related actions menu to change the comment on any timestamp. This is particularly useful when indicating timestamps with problems.

Select **Domain Security Policy or Business Process Policy** > **View Latest Version** from the related actions menu of a business process or domain security policy to see what the activated policy would look like. These reports include the changes pending for the selected security policy.

Select **Domain Security Policy or Business Process Policy** > **View Pending Changes** from the related actions menu of a business process or domain security policy to see the differences between the security policy being evaluated at the active timestamp and all the changes made since that time. These reports just show the selected security policy.

Other useful reports include:

- **Domain Security Policies with Pending Changes**
- **Business Process Security Policies with Pending Changes**
- **Domain Security Policy History**
- **Business Process Security Policy History**

SECURITY GROUPS

A security group is a collection of system users. Users can either be grouped explicitly (user-based security group) or by deriving group membership from other relevant information about the user. Types can have unconstrained (U), constrained (C) or mixed content sensitivity.

Type	How does a user become a member?	If configured in a security policy, will resulting access be constrained? And if so, by what?	Example
User-based (U)	Manually assigned. Follows user.	Unconstrained	HR Administrator, Finance Administrator
Role-based (C/U)	Based on Role Assignment. Roles are assigned to Positions.	Organization(s) supported in role	HR Partner; Benefits Partner; Accountant
Service Center-based (C/U)	Based on Service Center. Service center representatives in service center will be members.	Organization	3rd Party Help Desk
Job-based (C/U)	Based on job details (e.g. job profile, management level).	Organization	Chief Financial Officer, IT Workers, Vice Presidents
Integration System (C/U)	Manually assigned to Integration System Users	Organization	Credit Card System
Segment-based (C)	Based on included security groups.	Segments	Documents – Benefits Categories Manager – Integrations
Location Membership (U)	Based on location membership.	Unconstrained	All USA Workers
Organization Membership (U)	Based on Organization Membership (e.g. Cost Center, Location Hierarchy)	Unconstrained	EMEA Workers IT Cost Center Workers
Aggregate (Mixed)	Members are those in ANY of included security groups.	Mixed – depends on included security groups.	Those in HR Partner OR Benefits Partner
Intersection (Mixed)	Members are those in ALL of included security groups	Mixed – depends on included security groups. Constraints intersected.	Those in HR Partner security group AND HR Partner by location
Level-based (C)	Based on included levels. Requires leveling hierarchy defined, either Compensation Grade or Management Level.	Lower Levels, regardless of organization	Those in Manager Management Level, can access talent card data for all those in lower management levels.

CONTEXT SENSITIVITY

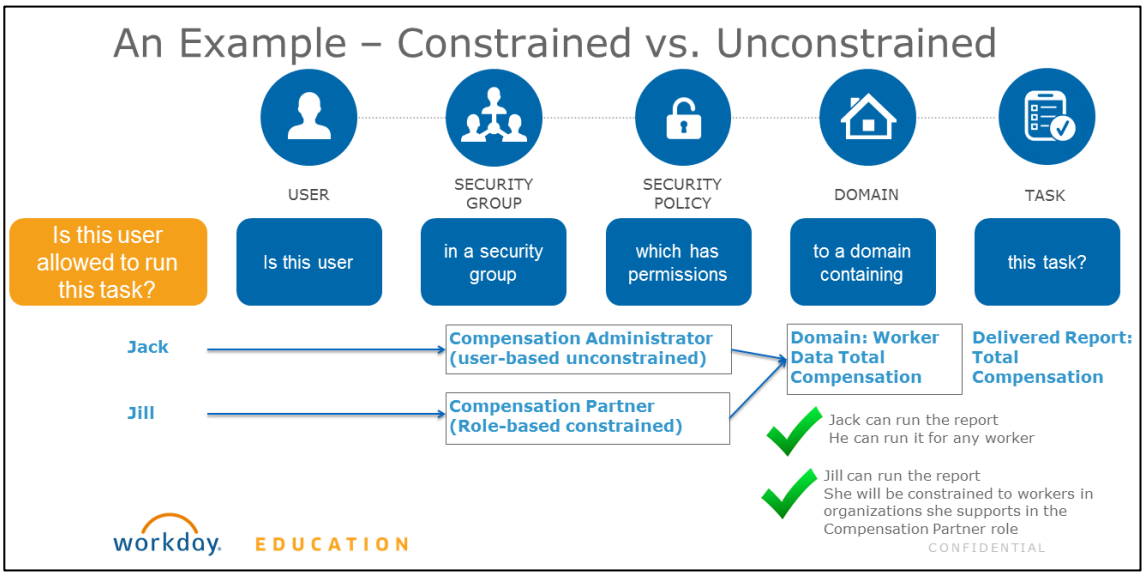
Security group types can be either constrained, unconstrained or mixed depending on configurations.

- **Unconstrained**: users have access to all data instances secured by the security group.
- **Constrained**: users have contextual access to a subset of data to which the security group has access. Constraints in Workday are typically to organizations, but can also be for levels and segments.
- **Mixed**: users may not have uniform access to data instances (Applies to intersection and aggregation security groups).

The following security group types are context-sensitive security groups:

- Constrained **Role-based** groups are sensitive to organization
- **Job-based** security groups are sensitive to organization
- Constrained **Service Center** security groups are sensitive to organization
- Constrained **Integration System** security groups are sensitive to organization
- "…"-**as-Self** security groups are sensitive to "own" data (e.g. Employee-as-self)
- **Level-based** security groups are sensitive to levels (not organizations)
- **Segment-based security groups** are sensitive to segments.

Workers associated with a context sensitive group are granted access to target items when they and the item instance share the characteristic to which the group is sensitive.



What if a user was a member of both an unconstrained and a constrained security group that are both configured for a given domain? A user's access will be the union of their access, so if the user has unconstrained access to a domain via one security group, unconstrained access will prevail.

USER-BASED SECURITY GROUPS

User based security groups are an essential security group type that you will use in your implementations. Characteristics of user-based security groups include:

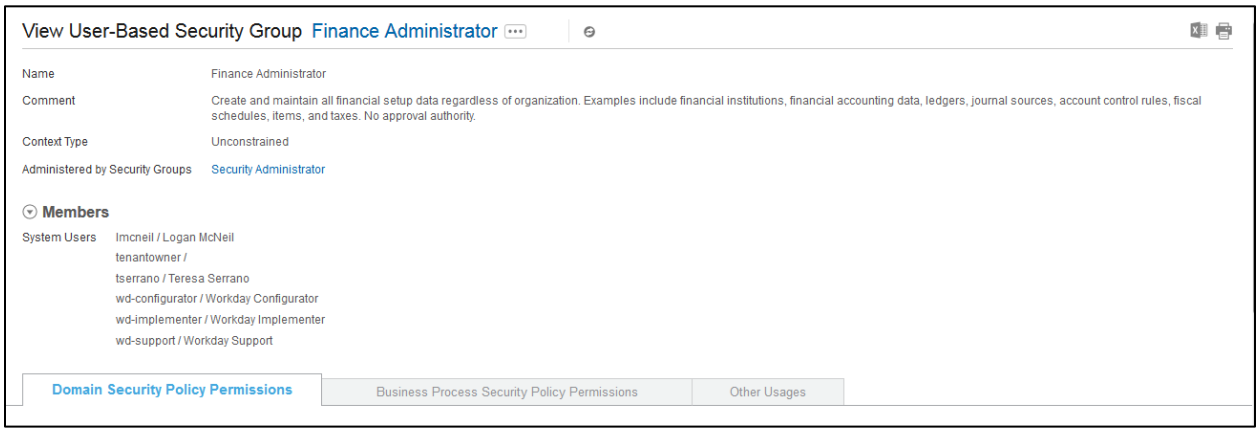
- **Manually assigned** to a user. They **follow a user.**
  - *It is important to manually review and change user-based security group assignments as people leave your company or change jobs.*
  - *Workday delivers a service that you can add as a step in a termination business process that removes user-based security groups from the Workday account.*

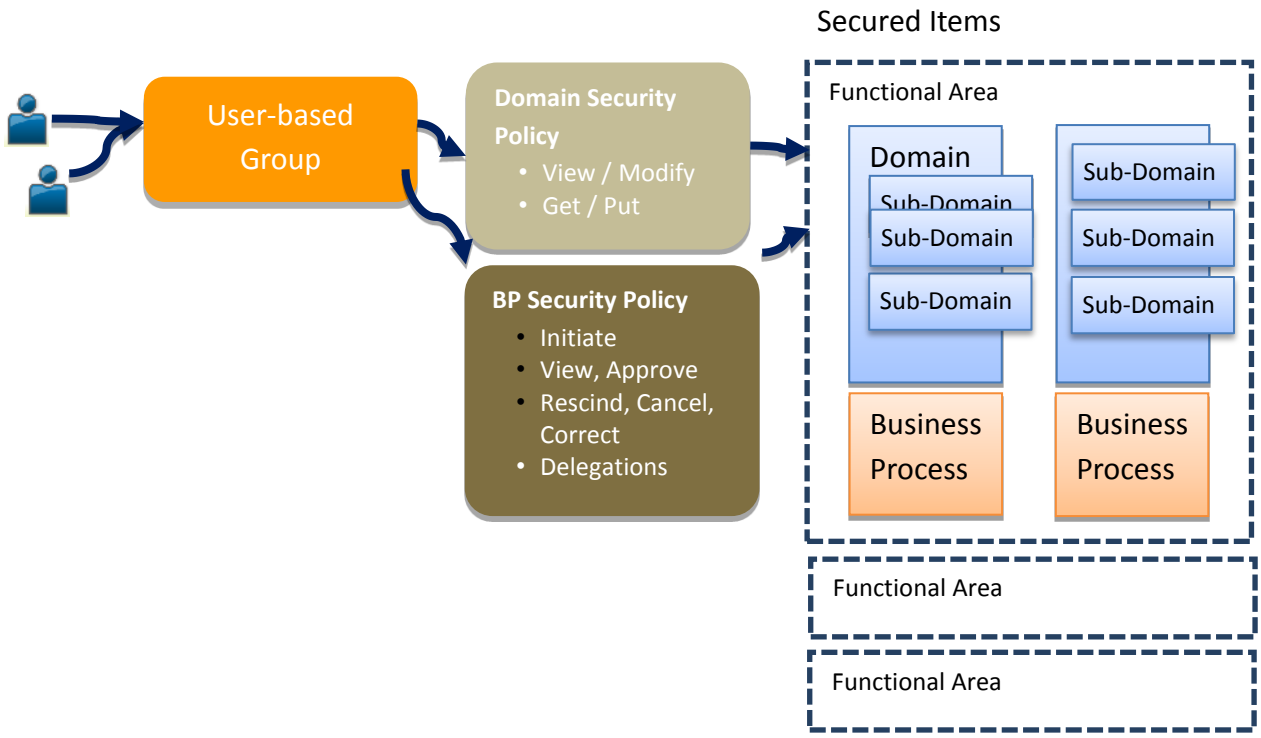
- User-based security groups are **unconstrained** security groups.
  - If a user-based security group has access to a domain, members can access items in that domain, and their access will be unconstrained, i.e. system-wide. "Once there" they will see all data available for that item.

- Workday delivers several user-based security groups as starting points that you can leverage and assign to your workforce. These delivered security groups include such security groups as:
  - Security Administrator
  - Report Writer
  - HR Administrator
  - Finance Administrator
  - Setup Administrator

- You can also create your own user-based security groups as needed.

This is the least restrictive group. It is not context sensitive, in that it makes no attempt to match the context of the workers in the group (organization or ownership) with the context of the secured item. Use user-based security groups for administrators who you want to have global (enterprise-wide) access.



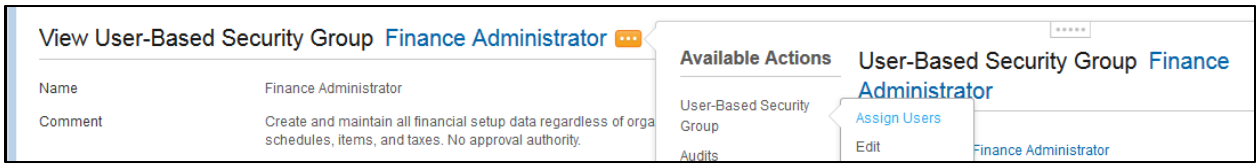


You can assign users to user-based security groups in one of several ways:

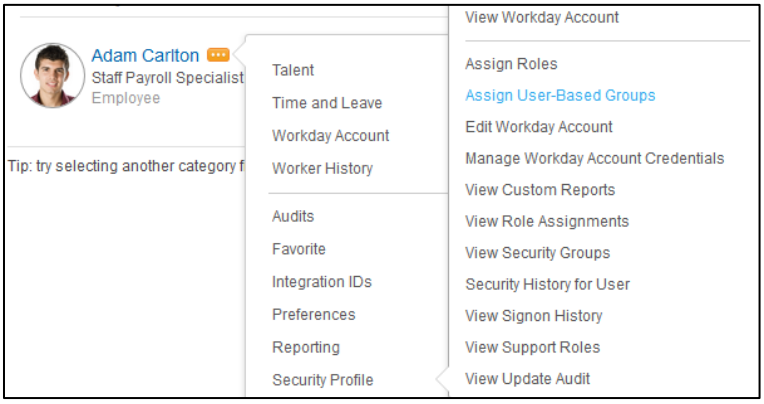
a. Run task: **Assign Users to User-based Security group**

b. Run task: **Assign user-based Security group for Person**

c. Bring up security group and use related actions to assign users



d. Bring up user and use related actions to assign user-based Security groups



CREATE AND DEPLOY USER-BASED SECURITY GROUP

1. Run **Create Security Group** task
2. Find the Domains and/or Business Processes
3. Assign user to User Based Security group
4. Edit Security Policies
5. Activate Pending Security Policy Changes
6. Test

ACTIVITY 5A – CREATE USER-BASED SECURITY GROUP

Scenario: Our goal is to allow Lillian Chu the ability to "find expense reports' and change them for any worker as our Expense Report Administrator. We will need to give her unconstrained access to manage expense reports in tenant. We will use a user-based security group to manually identify Lillian.

OVERVIEW

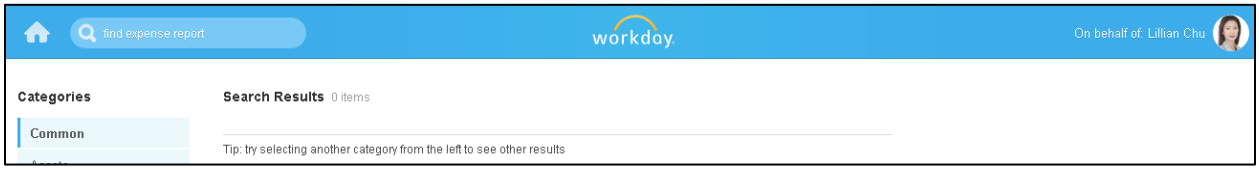
Logan McNeil will perform the following actions:

1. Create Security Group
2. Assign User-based Security Groups

TASK 1: VERIFY EXISTING SECURITY

Start a proxy session as Lillian Chu

1. Verify that Lillian does not currently have access to find expense reports in the tenant.
2. From the search box, enter: **Find Expense Reports**
3. No results should be returned



4. **Stop proxy** session. Confirm and click OK.

TASK 2: CREATE USER-BASED SECURITY GROUP

As Logan McNeil

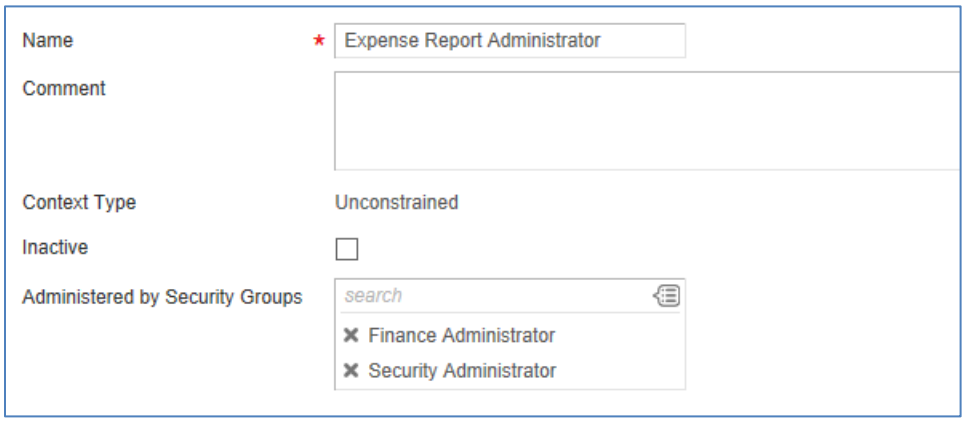
1. Search for 'create sec gr'
2. Click on the **Create Security Group** task
3. Define the Security Group as follows:

Field Name	***Entry Value***
Type of Tenanted Security Group	User-Based Security Group

Name	Expense Report Administrator

4. Click the **OK** button

5. For the **Administered by Security Groups** Field, enter: Security Administrator and Finance Administrator.

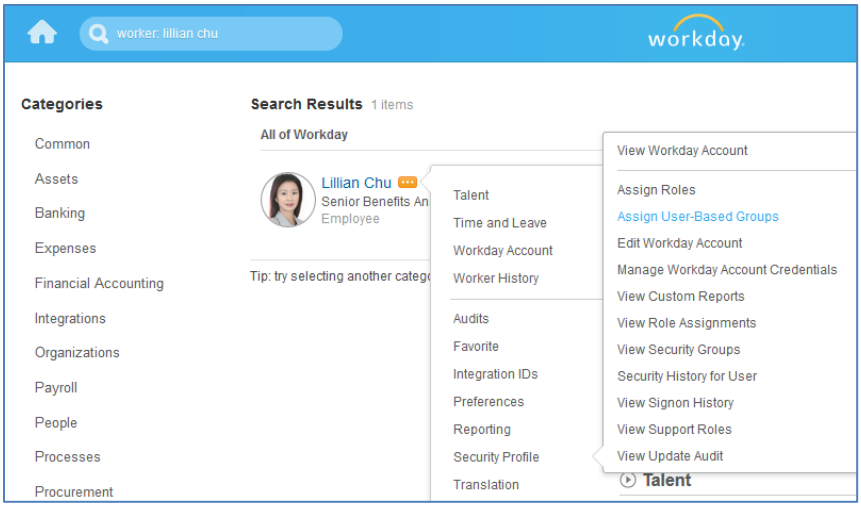


6. Click the **OK** button to save and click **Done**

TASK 3: ASSIGN USER-BASED SECURITY GROUP

1. Search for '*Lillian*'

2. Click on the related action icon tied to Lillian Chu/Employee and select the **Security Profile** > **Assign User-Based Groups** task



3. Click the icon for the **User-Based Groups to Assign** field

4. Select **Expense Report Administrator**

5. Click the **OK** button to save

6. Click the **Done** button

Note that you can also assign user based security groups to users by running tasks:

- **Assign Users to user-based security group**
- **Assign user-based security group for person**
- Related action option to assign users off the security group.

(End of Activity)

ACTIVITY 5B – EDIT DOMAIN SECURITY POLICY AND ACTIVATE PENDING SECURITY POLICY CHANGES

Scenario: Logan must now edit the domain security policy. Once the security policy has been modified, the pending security policy changes must also be activated. The new changes will need to be tested to ensure that Lillian has access to manage expense reports in the tenant.

OVERVIEW

Logan McNeil will perform the following actions:

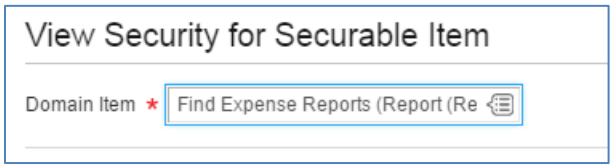
1. Edit Domain Security Policy
2. Activate Pending Security Policy Changes

TASK 1: EDIT SECURITY POLICY PERMISSIONS FOR A DOMAIN

As Logan McNeil (lmcneil)

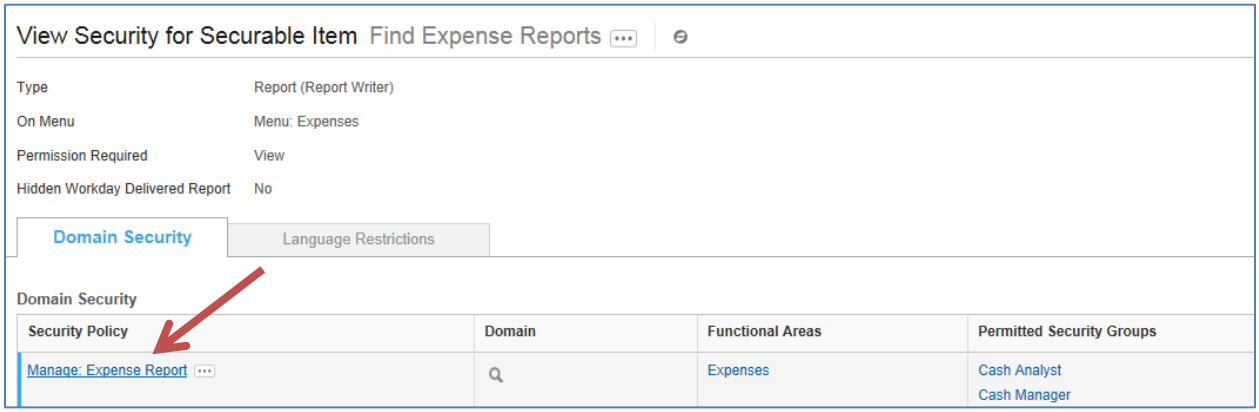
1. To determine what domain you need to edit, run the **View Security for Securable Item** report. From the search box, run **View Security for Securable Item**

2. In the Domain Item prompt, enter **Find Expense Reports** and select the **Find Expense Reports (Report (Report Writer))** item



3. Click **OK**.

4. Note how this task is secured to the **Domain: Manage Expense Report**.

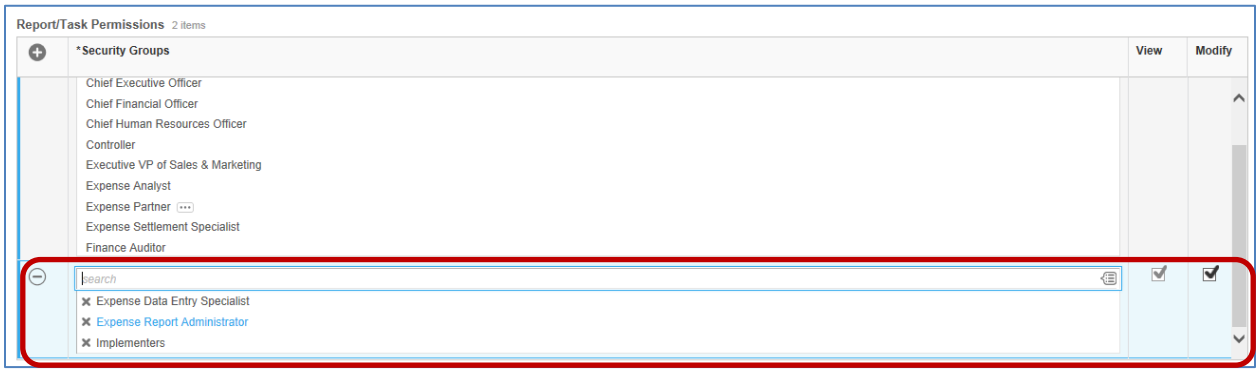


5. Click on the Domain Security Policy for Manage Expense Report to view its details.

6. Note the allowed security group types. Since our user-based security group is unconstrained, we can configure our new Expense Report Administrator security group in the permissions.

7. Using related actions off the domain security policy, select **Domain Security Policy > Edit Permissions**

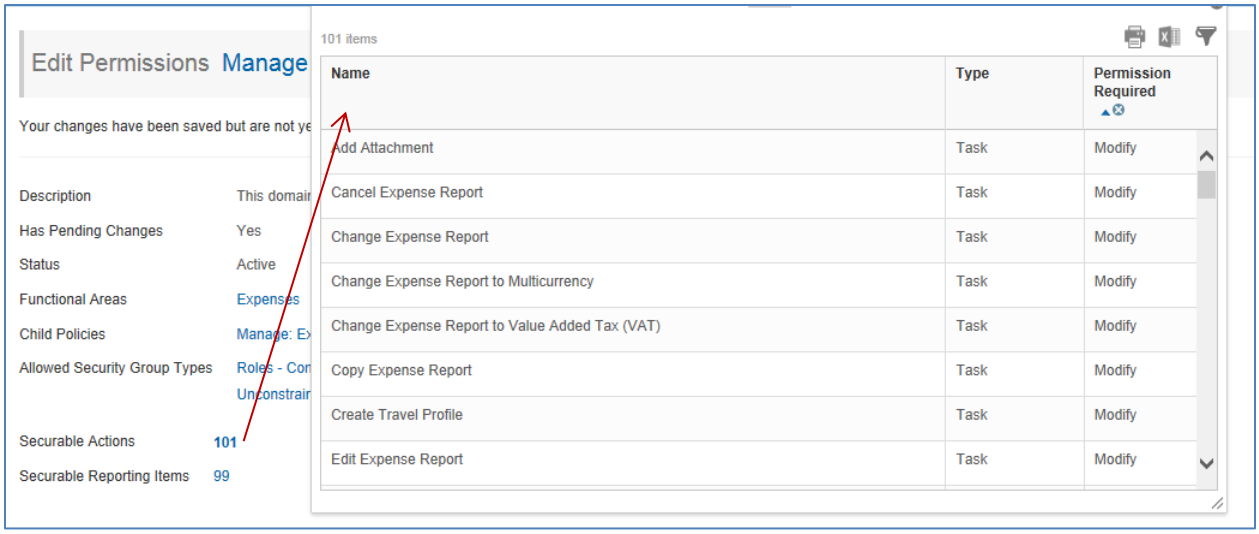
8. Under the Report/Task Permissions, add the *Expense Report Administrator* security group to the groups with **Modify** access. Note the warning to activate changes.



9. Click **OK** to save the changes

10. How many securable actions are in this domain? _____

11. Click on the number or securable actions and see which ones require modify vs. view permissions.



12. Remember that access to the domain will provide access to all items in the domain. We are granting Lillian Chu access to view and modify all items in this domain via the user-based security group: Expense Report Administrator.

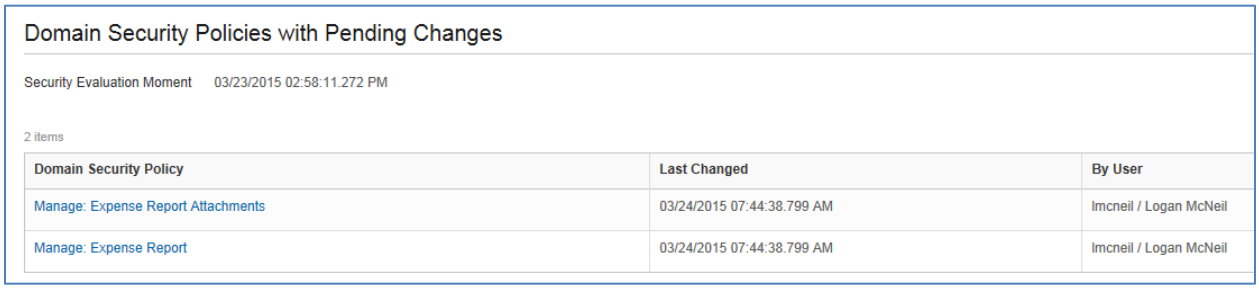
13. Click the **Done** button

TASK 2: ACTIVATE PENDING SECURITY POLICY CHANGES

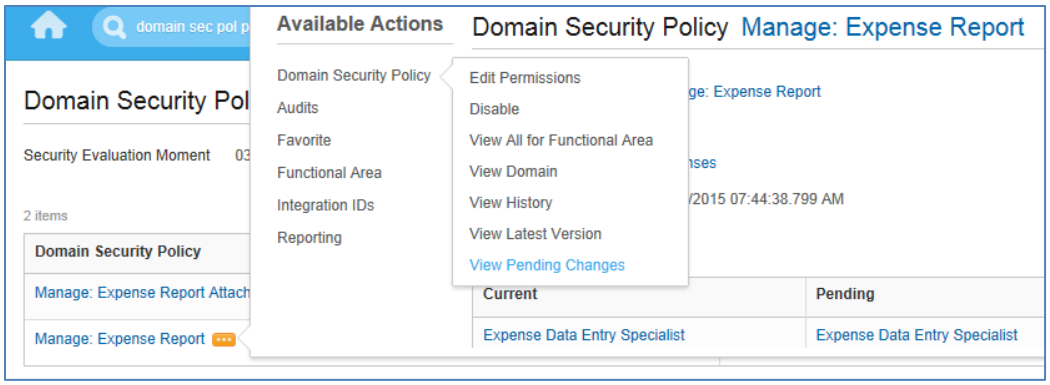
1. To see what domain security policies will be activated, let's run a report.

2. Search for *'dom sec pend'* and run the **Domain Security Policies with Pending Changes** report

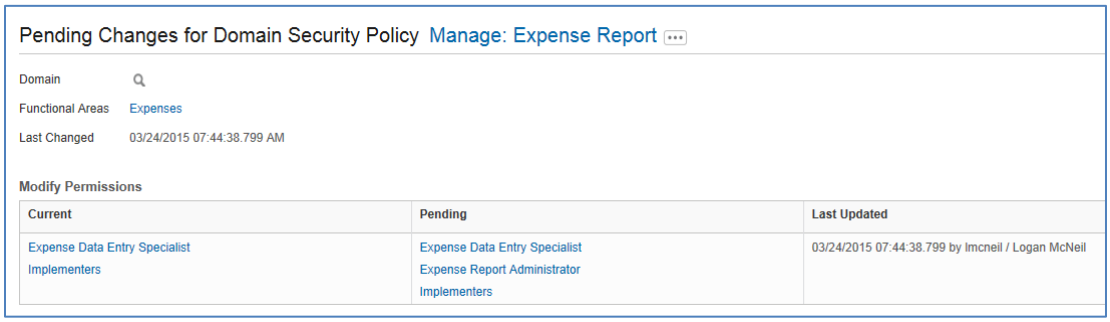
3. Notice the security policy we edited awaiting activation along with the child domain that is inheriting parent permissions.



4. Using related actions off the Manage: Expense Report domain security policy, select Domain Security Policy > View Pending Changes



5. See the details of the pending changes, what the current activated permissions are vs. the pending.

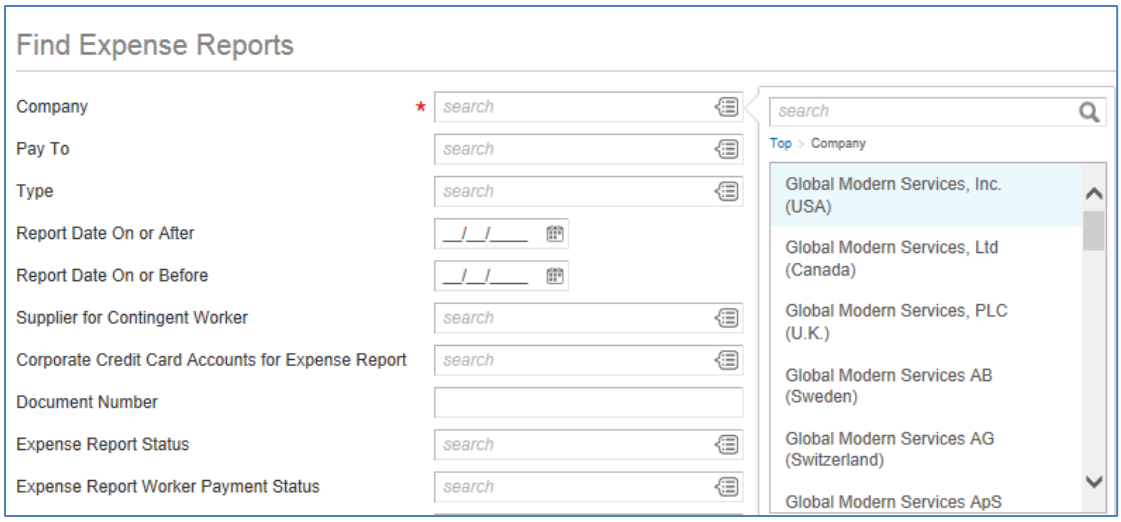


6. Search for *'Activate'* and run the task **Activate Pending Security Policy Changes**
7. Enter *'Activity 5'* into the comment box
8. Click the **OK** button
9. Check the **Confirm** check box
10. Click the **OK** button

TASK 3: TEST THE SECURITY CHANGES

Start proxy as Lillian Chu

1. Run the **Find Expense Reports** task to see if Lillian now has access.
2. See how Lillian can now not only have access to this task, but that her access is unconstrained. She can access any worker's expense report across any company.



3. Select Company: Global Modern Services (USA)

4. Pay to: Logan McNeil (Employee)

5. Click OK

6. See all the expense reports for Logan and see the actions Lillian can take on the expense reports.

7. **Stop proxy**

(End of Activity)

ACTIVITY 5C – INVESTIGATE SOME SECURITY REPORTS

In this activity, you will run the following reports:

- Domain Security Policy History
- Security Analysis for Security Group
- Test Security Group Membership
- Security Analysis for Action
- View Security Group

TASK 1 – INVESTIGATE SECURITY RELATED REPORTS

1. As Logan McNeil (lmcneil) (make sure to stop your proxy session if still proxied as Lillian Chu)

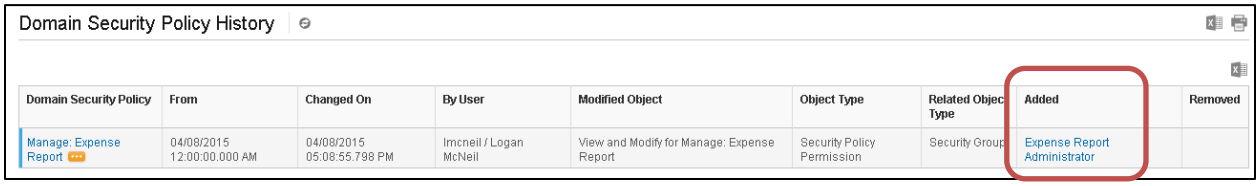
2. Search for and run the **Domain Security Policy History** report

   a. In the Domain Security Policy prompt, select By Functional Area > Expenses> **Manage Expense Report**

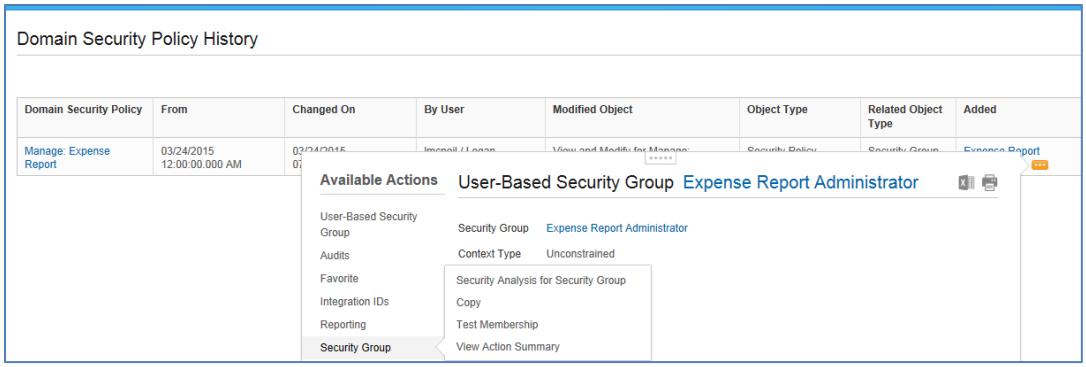
   b. Enter today's date for From

   c. Click OK

   d. Note your changes showing the added security group.

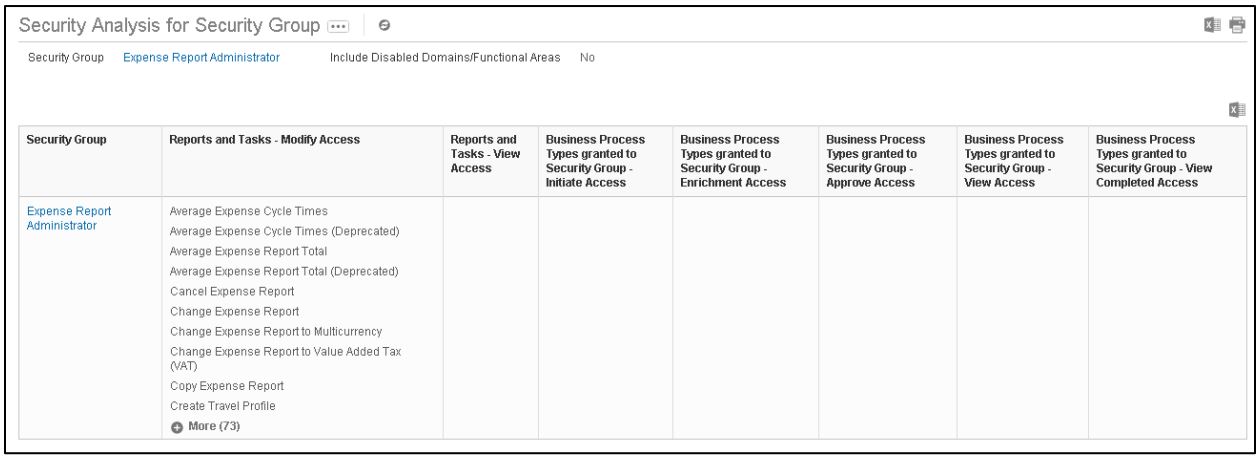


3. Reports can be run from the search box, or can be configured as related action options. Using related actions off the security group, Expense Report Administrator, select **Security Group**> **Security Analysis for Security Group**

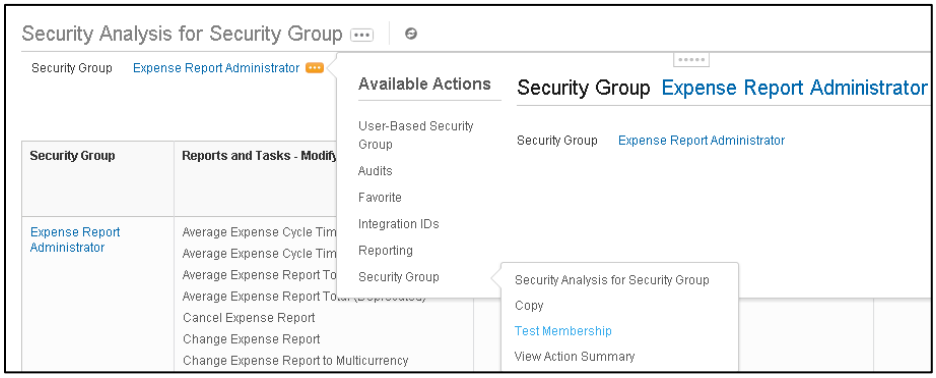


4. Click **OK**

5. Note reports and tasks accessible to the Expense Report Administrator. This report, Security Analysis for Security Group, can be run from the search box too.

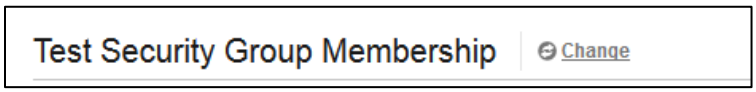


6. Using related actions off the **Expense Report Administrator** security group, select **Security Group > Test Membership.** This related action option runs the delivered report: *Test Security Group Membership.*



7. Enter Lillian Chu and click OK. Note how Lillian is a member.

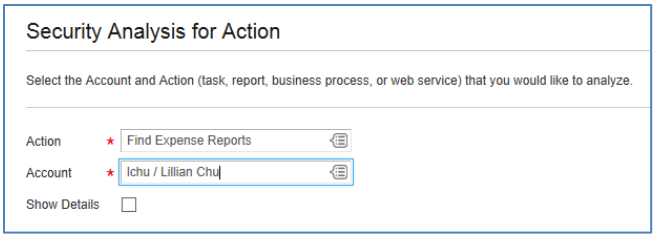
8. Rerun the report by clicking on the change icon



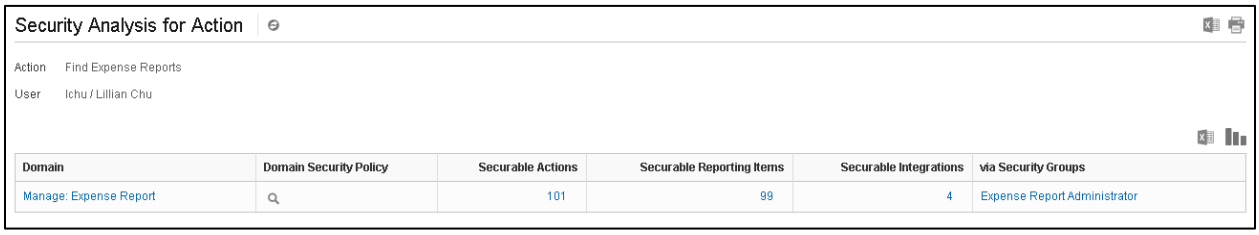
9. Enter Logan McNeil (lmcneil). Note how Logan is **not** a member.

10. Lastly, from the search box, run the **Security Analysis for Action** report.

11. Run for Action**: Find Expense Reports** and Account: lchu/ Lillian Chu



12. See how on the far right, we can see how Lillian has access to this action via the security group: *Expense Report Administrator*.



13. Rerun the **Security Analysis for Action** report. This time run for lmcneil (Logan McNeil) and the same **Find Expense Reports** action.

14. See how Logan has access to this action, Find Expense Reports, via the *Chief Human Resources Officer* security group.

Users can have access to a given item or action via different security groups permitted for the domains securing the given item.

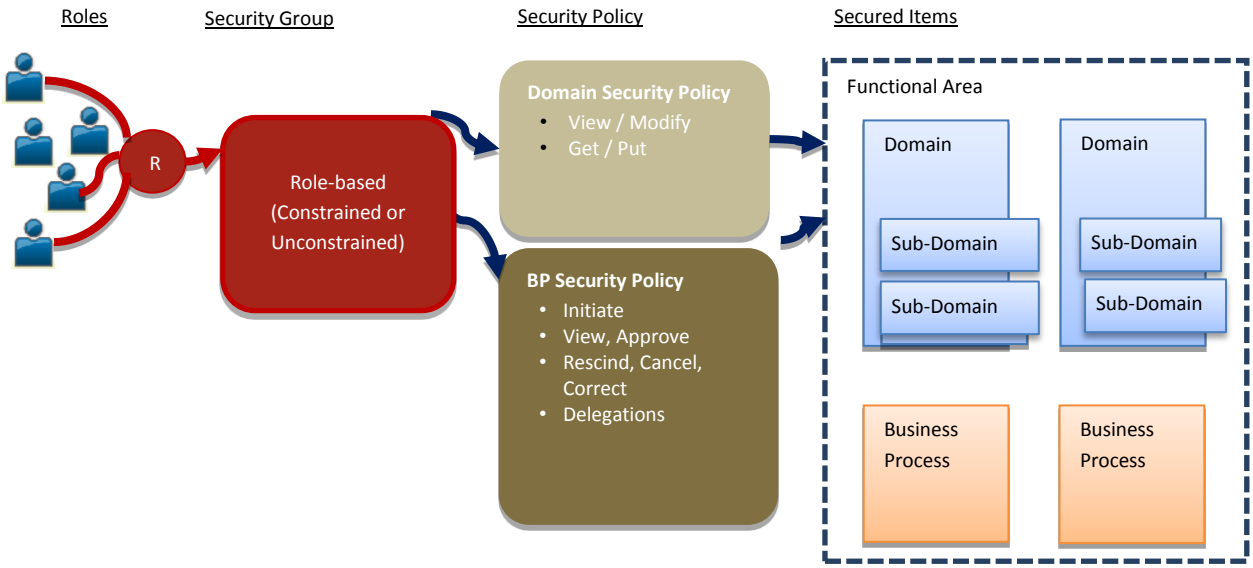
15. **Optional** - Check out other examples of user-based security groups in tenant. (run **View Security Group** and select **user-based**)

(End of Activity)

ROLE-BASED SECURITY GROUPS

Role based security groups are a very essential and very powerful way of granting needed access to Workday. Role-based security groups allow you to identify users based on role-assignments. Role-based security groups are commonly used to **identify users in key support or leadership roles supporting different organizations**.

Role-based security groups can be defined as **constrained** or **unconstrained**.
Constrained Role-based security groups, for example, are a common way to identify and constrain your support staff to target instances in a given organization (or organizations) that they support or lead.



For example, the **Manager role-based constrained security group** shown below,

- Identifies those assigned to the **Manager role**
- **Constrains their target access to the organizations to which they are assigned to in that role** and any subordinate organizations where there is no Manager role assigned.

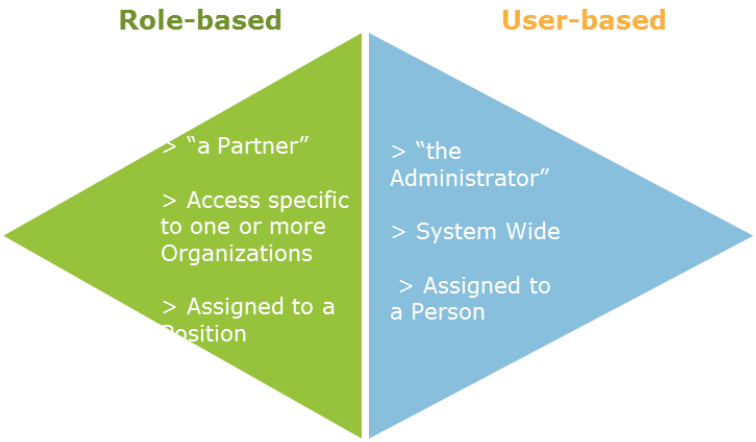
HOW ARE ROLE-BASED SECURITY GROUPS DIFFERENT THAN USER-BASED SECURITY GROUPS?

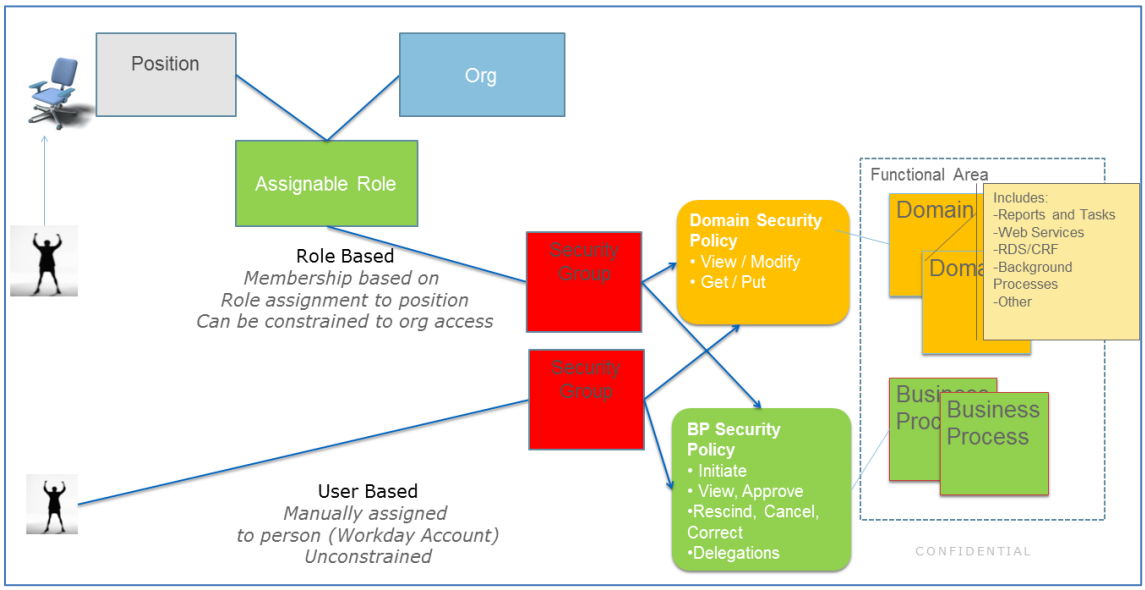
User-based security groups are manually assigned to a person (or Workday account) and follow that person. Membership in a role-based security group is determined via role assignment. Roles must be defined for organization types and roles must then be assigned.

Role-assignments are to positions, not to the worker directly.

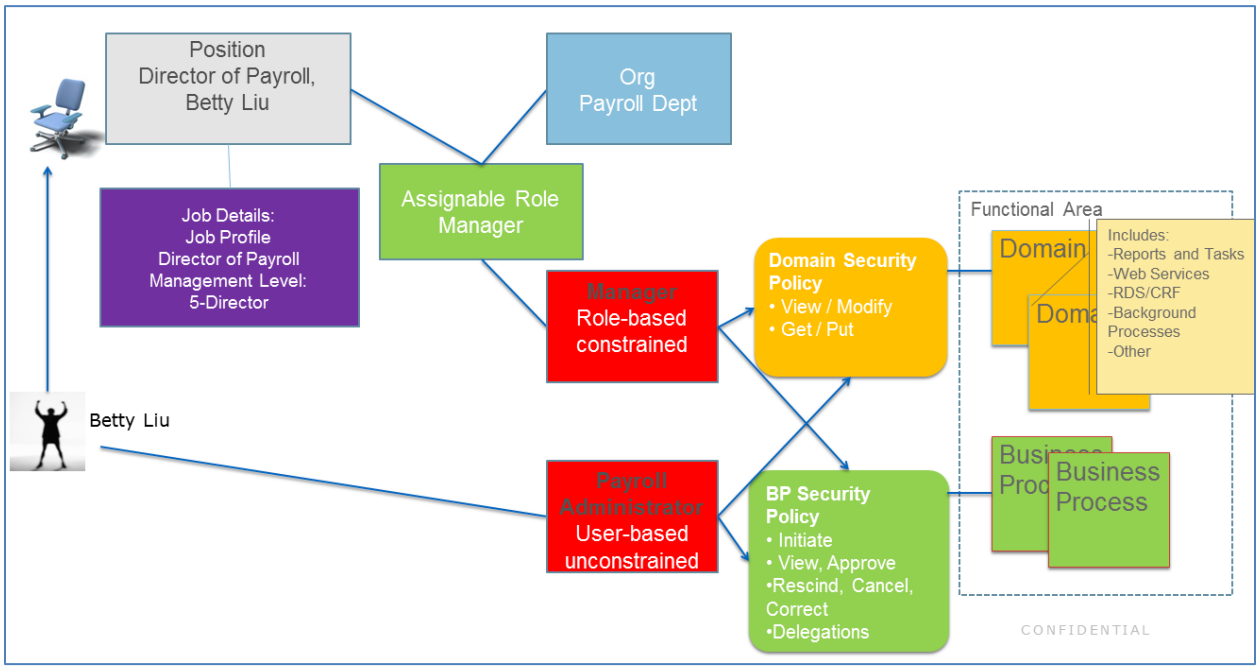
Members of a role-based security group will automatically be those in positions assigned to the role referenced in the role-based security group.

Role based security groups are commonly constrained, limiting members' target data access to instances in organizations to which they are assigned to in the role.





Below is an example of a Worker, Betty Liu. Betty is manually assigned the **Payroll Administrator** user-based security group. She will have access to domains and business processes configured with the Payroll Administrator security group. Her access to items in these domains and business processes will be unconstrained. Betty's position is also assigned to the Manager role, since she is the manager of the Payroll Department and has direct reports in that organization. With this role assignment on her position, Betty is also a member of the **Manager** role-based constrained security group. She can also access domains and business processes configured with the Manager security group. Her access in these areas will be constrained to target instances in the organization she is assigned to in the role, i.e. the Payroll Dept.

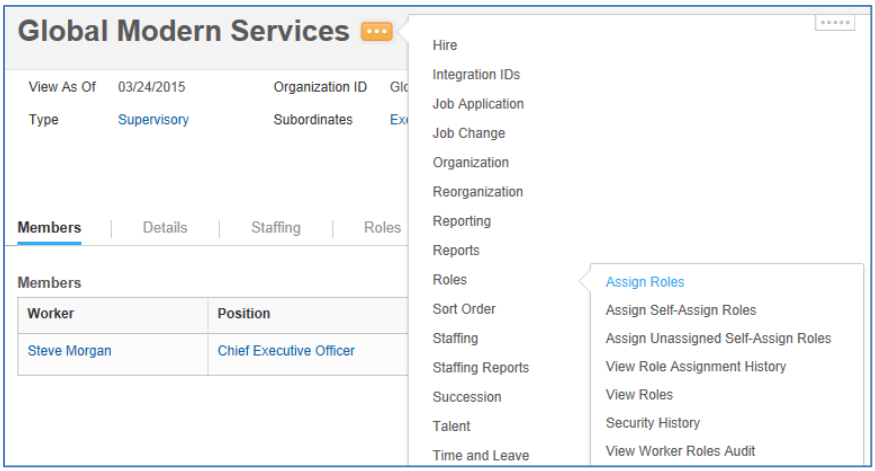


A CLOSER LOOK AT ROLE-BASED SECURITY GROUPS

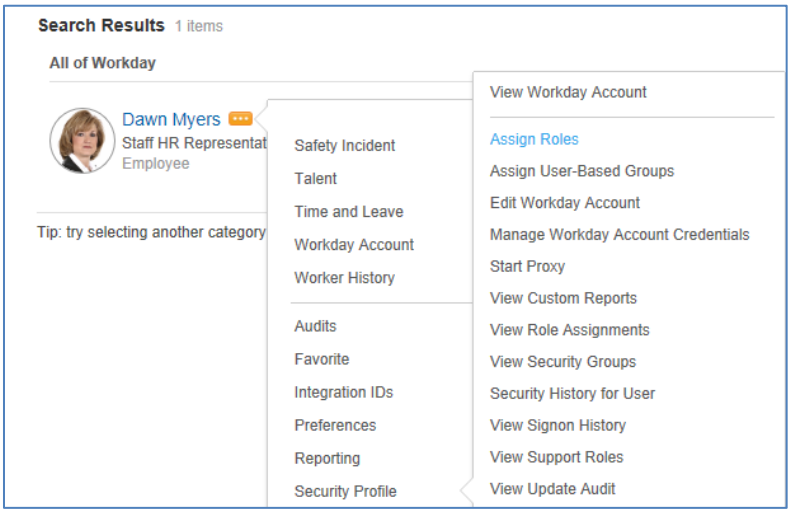
1. The **role must be defined and enabled for the given organization type.**
   Some examples include:

Role	Enabled for Organization Type
HR Partner	Supervisory
Accountant	Company
Cost Center Manager	Cost Center
Compensation Partner by Location	Location Hierarchy

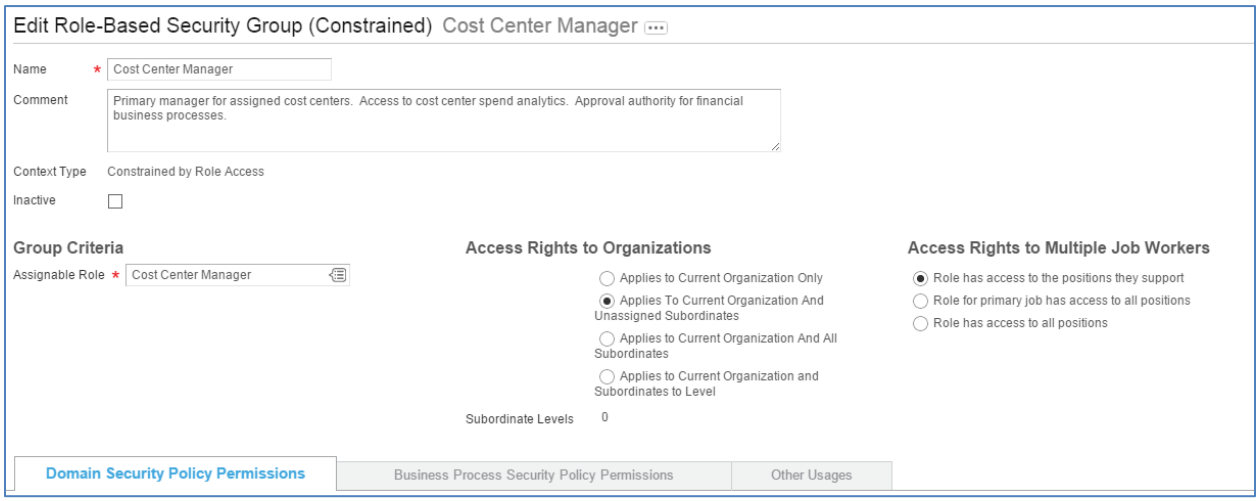
2. **The role must be assigned to a position,** not directly to a worker or person.
   a. Roles can be assigned at the organization level.



   b. Roles can also be assigned off the worker. This initiates the Assign Roles business process.



3. Create the **role-based security group (constrained or unconstrained).**
   The role-based security group will reference the role and **members** of the role-based security group will be **those assigned in that role**.
   a. **If constrained, you must specify the access rights**



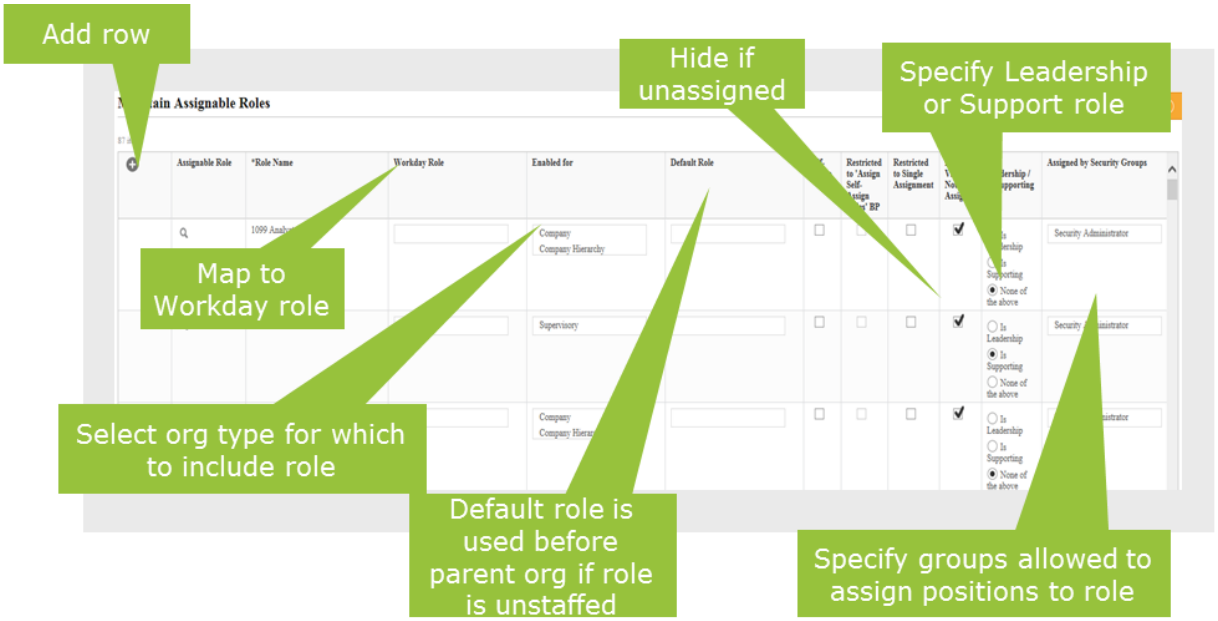
4. Configure the role-based security group in needed **domain and/or business process security policies**
   a. If constrained, target access to secured items will be constrained by the organization access rights defined in the security group.
5. **Activate**
6. **Test**

Workday delivers some starting roles enabled for organization types and delivers corresponding role-based security groups that use these delivered roles. You can also create your own roles and corresponding role-based security groups.

MAINTAIN ASSIGNABLE ROLES

Roles must be defined in Workday before creating role-based security groups. Workday delivers starting roles and role-based security groups.

You can also create and maintain your own roles. You create or edit these roles with the **Maintain Assignable Roles** task, which enables you to maintain roles for numerous role-enabled objects simultaneously. The Maintain Assignable Roles task is secured to the *Set Up: Assignable Roles* security domain.



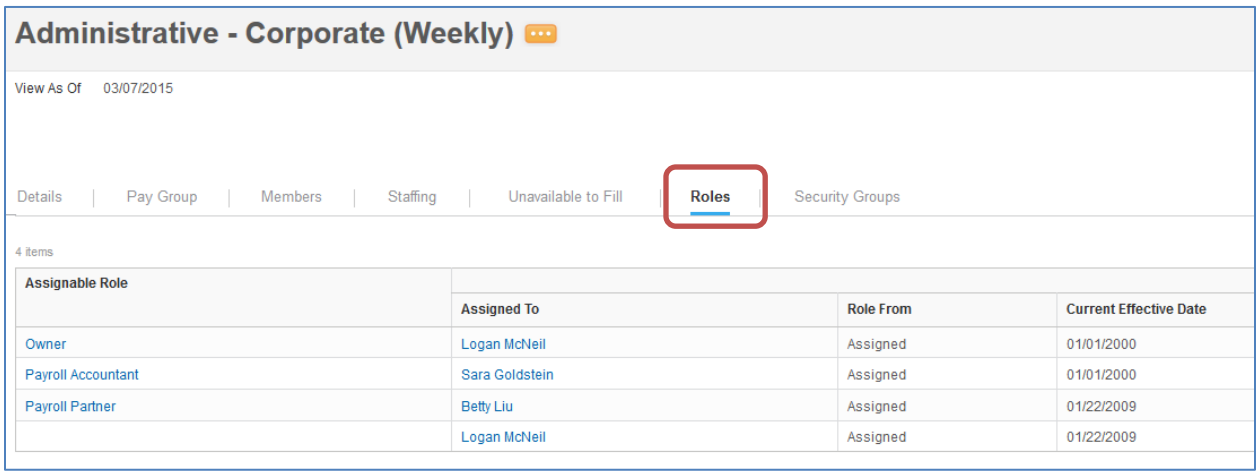
When maintaining assignable roles, members of the security group you specify as the 'Assigned by Security Group' will be considered members of the Workday automatically assigned "**Role Maintainer**" security group for that role.

In addition to the Maintain Assignable Roles task, which enables you to maintain roles for numerous role-enabled objects at once, there are options available to quickly assign these roles in "self-service" fashion at the level of an individual organization, or other role-enabled object using *Select Roles > Assign Roles* as a related action. You can also use the *Assign Roles* business process as a stand-alone business process or as a subprocess on most inbound and outbound staffing events.

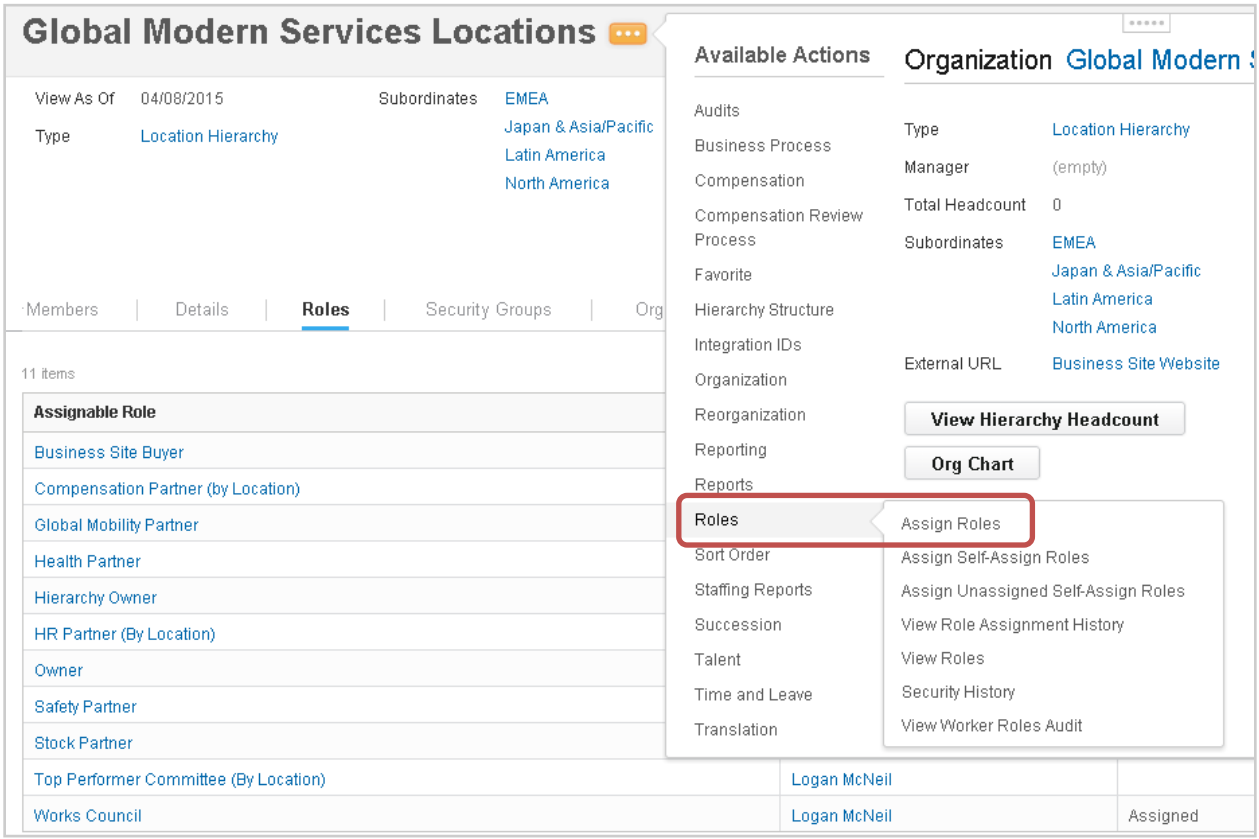
The values determined by the radio buttons *Is Leadership* and *Is Supporting* are used in reports, such as My Leadership Roles and My Supporting Roles. If a role is configured as a leadership role, members can also be configured to show in organization chart displays.

Defined roles will show as assignable roles for the given enabled organization type.

Shown below are roles defined for the Pay Group organization type. Roles can then be assigned for a given organization, e.g. Pay Group.



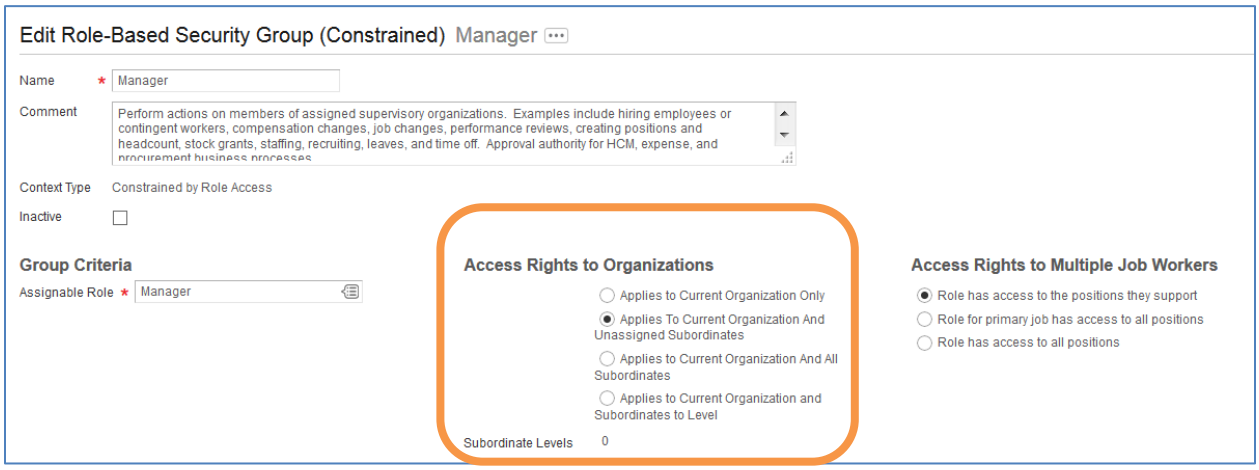
Another example is assigning enabled roles for a location hierarchy.



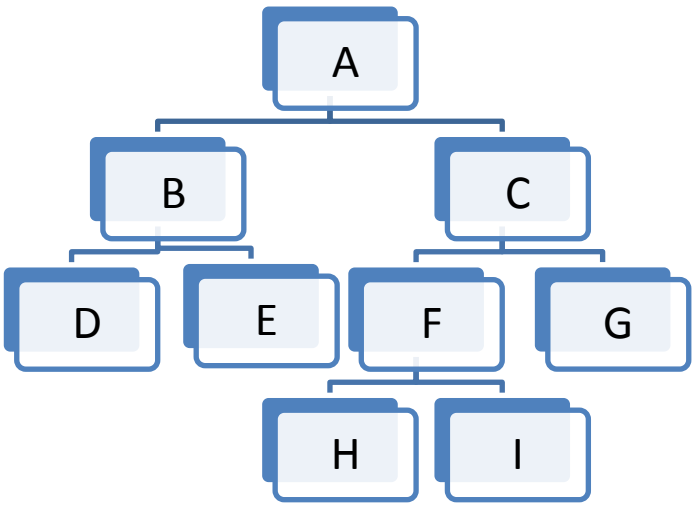
ROLE BASED CONTEXT: ACCESS RIGHT TO ORGANIZATIONS

Role-based constrained security groups are most commonly used to identify your support staff where you can then **constrain members to target instances in the organizations to which they are assigned to in that role**.

For constrained role-based security groups, there are **four main constraints** you can configure:



1. **Current Organization Only** – constrains members to target instances in the organization that they are assigned to in that role.
2. **Current organization and unassigned subordinates –** constrains members to target instances in the organization that they are assigned to and any subordinate organizations that do not have someone directly assigned to the role.
3. **Current organization and all subordinates** – constrains members to target instances in the organization they are assigned to and all subordinate organizations, regardless of whether others are assigned in that role in subordinate organizations.
4. **Current organization and subordinates to level** – constrains members to target instances in the organization they are assigned to and subordinate organizations down to a number of levels in the hierarchy.



CREATE AND DEPLOY ROLE-BASED SECURITY GROUP

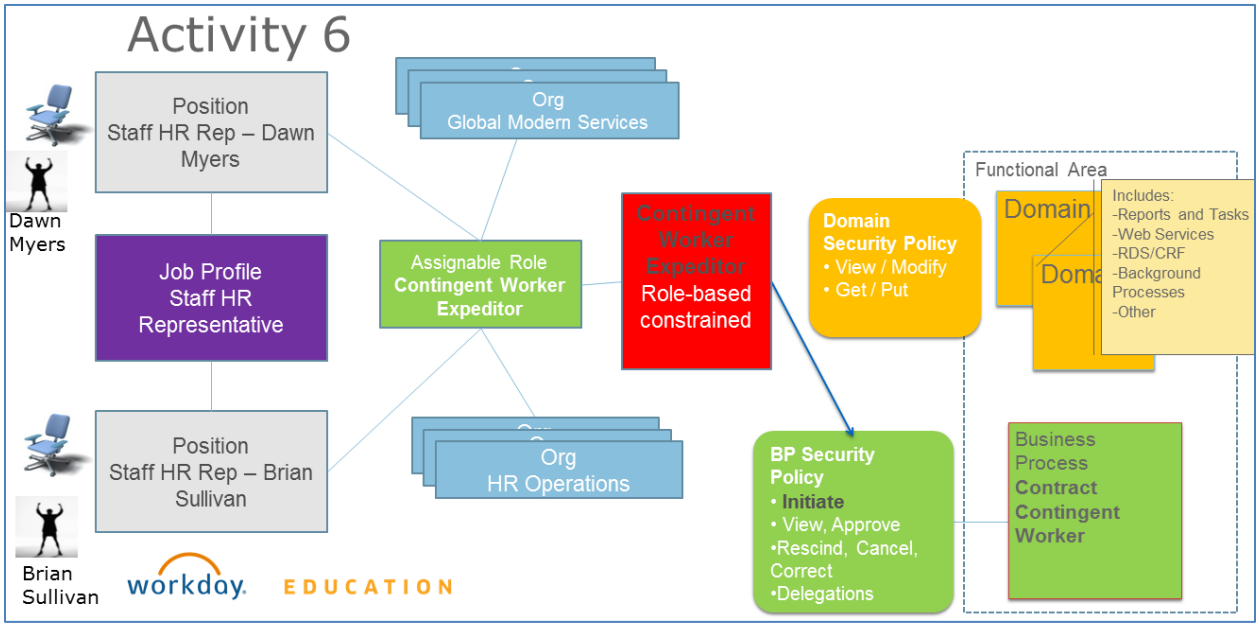
1. Run Maintain Assignable Roles task
2. Run Create Security Group task – reference the role
3. Use Assign Roles task
4. Edit Security Policies
5. Activate Pending Security Policy Changes
6. Test

ACTIVITY 6A – CREATE ROLE-BASED CONSTRAINED SECURITY GROUP

Scenario: A new role is to be created called Contingent Worker Expediter to process the on-boarding of contingent workers. The Staff HR Representative, Dawn Myers, has been identified as the support person for the top level supervisory organization structure and unassigned subordinate organizations. Brian Sullivan, Staff HR Representative will be the support person for the HR Operations Department.

As the Security Configurator, you will create a new assignable role and new role-based security group called Contingent Worker Expediter with the needed constraints of Current Organization and Unassigned Subordinates.

OVERVIEW

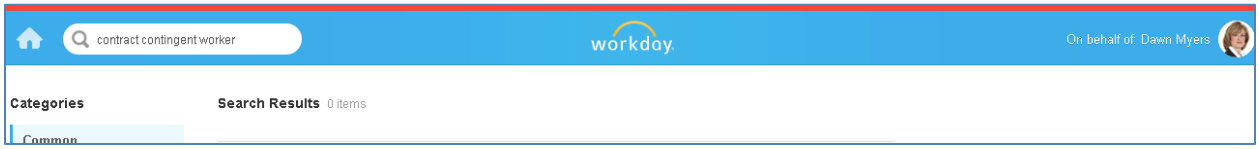


Logan McNeil will perform the following actions:

1. Maintain Assignable Roles
2. Create Security Group
3. Assign Role

TASK 1: VERIFY EXISTING SECURITY

1. From the search box, run the **Start Proxy** task and start a proxy session as Dawn Myers (dmyers)
2. As Dawn, see if Dawn has access to the **Contract Contingent Worker** task. from the search box, enter C*ontract Contingent Worker* and see how no results are returned.



3. **Stop Proxy**

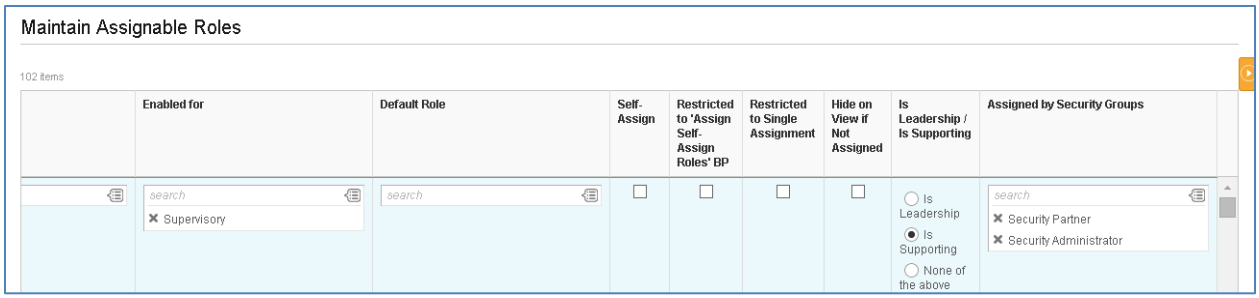
TASK 2: MAINTAIN ASSIGNABLE ROLES

As Logan McNeil (lmcneil)

1. Create the new role by first searching for *'maintain role"*
2. Click on the **Maintain Assignable Roles** task
3. Note and then collapse the warnings in the upper right.
4. Add a row by clicking the icon
5. Configure the Assignable Role as follows:

Field Name	***Entry Value***
Role Name	Contingent Worker Expediter
Enable for	Supervisory
Hide on View if Not Assigned	Do Not Check the Box
Is Leadership/Is Supporting	Is Supporting
Assigned by Security Groups	Security Administrator Security Partner

Note: the security group(s) you designate as the 'Assigned by Security Group' for this role, will automatically be assigned the "Role Maintainer" security group for this role.



6. Click the **OK** button to save

7. Click the **Done** button

TASK 3: CREATE SECURITY GROUP

1. Search for 'create sec gr'

2. Click on the **Create Security Group** task

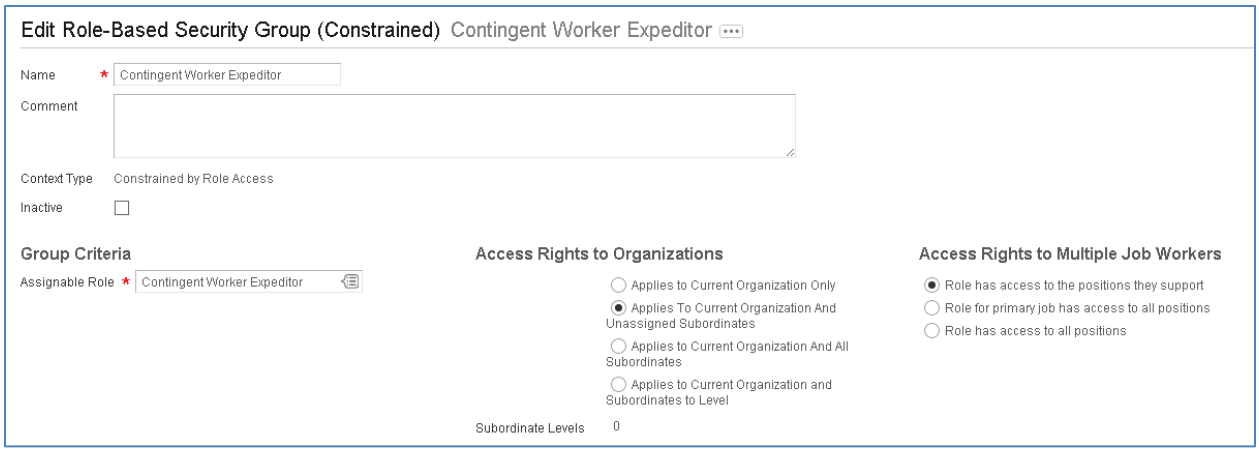
3. Set the type and name as follows:

Field Name	***Entry Value***
Type of Tenanted Security Group	Role-Based Security Group (Constrained)
Name	Contingent Worker Expediter

4. Click the **OK** button

5. Configure the Security Group as follows:

Field Name	***Entry Value***
Group Criteria -> Assignable Role	Contingent Worker Expediter
Access Rights to Organizations	Applies to Current Organization and Unassigned Subordinates
Access Rights to Multiple Job Workers	Role has access to the positions they support



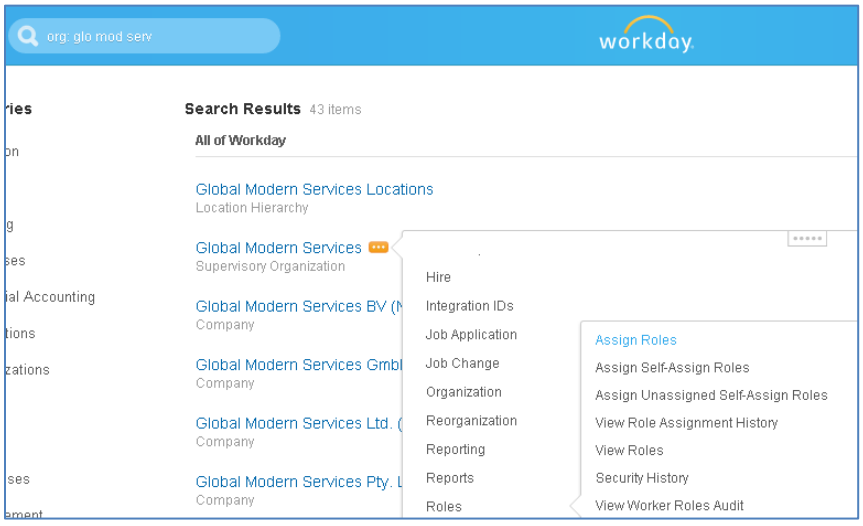
6. Click the **OK** button to save

7. Click the **Done** button

TASK 4: ASSIGN ROLE

1. Let's assign our new role off of an organization. From the search box, search for **org: glo mod serv**

2. From the related action icon on the **Global Modern Services** Supervisory Organization, select **Roles** -> **Assign Roles**

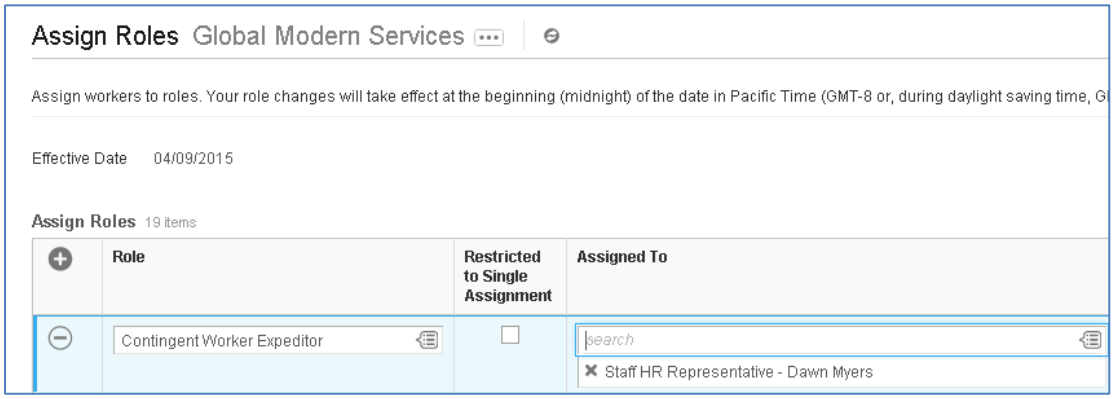


3. Click the **OK** button to accept today as the Effective Date.

4. Click on the icon to add a new row

5. Click on the **Role** icon to select **Contingent Worker Expediter**

6. Click on the ***Assigned To** icon to select **Staff HR Representative - Dawn Myers** (Tip: enter the name *Dawn* and you can quickly find Dawn's position)

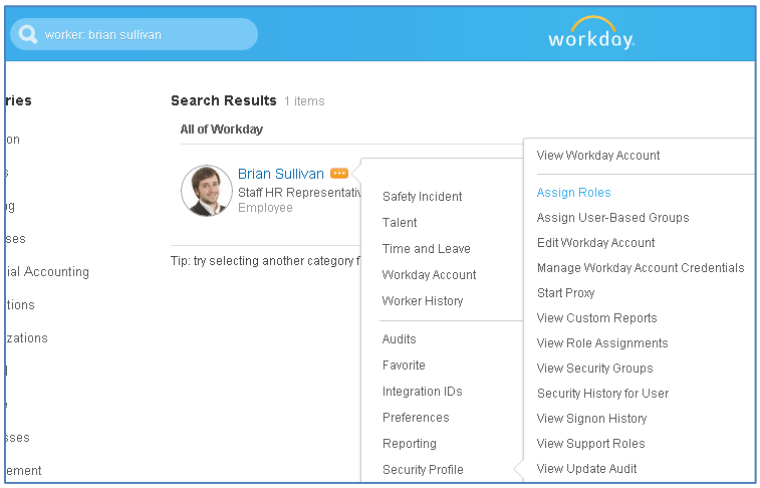


7. Click the **OK** button

8. Click the **Done** button

9. From the search box, search for **worker: Brian Sullivan**

10. Using related actions, select **Security Profile > Assign Roles**



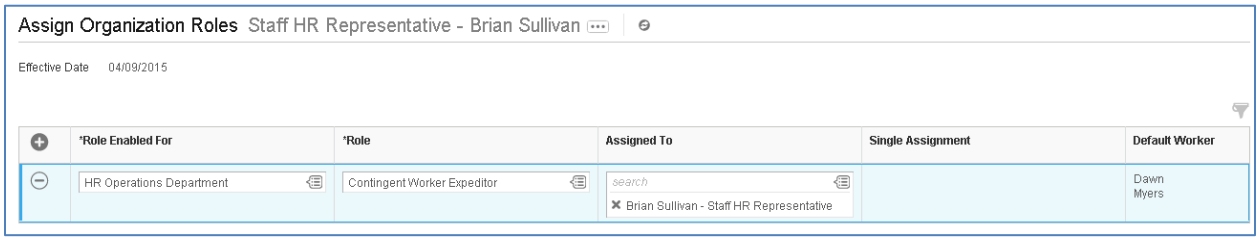
11. Click **OK** to accept the effective date of the change as today.

12. Add a row for a new role assignment.

13. Populate the assignment as follows:

Field Name	***Entry Value***
Role Enabled for	HR Operations Department

Role	Contingent Worker Expeditor
Assigned to	Brian Sullivan – Staff HR Representative (hint: type 'brian' to quickly find the position)



14. Click **Submit**. This initiates the *Assign roles* business process. Roles can be assigned at the organization level or by using this business process at the worker level.

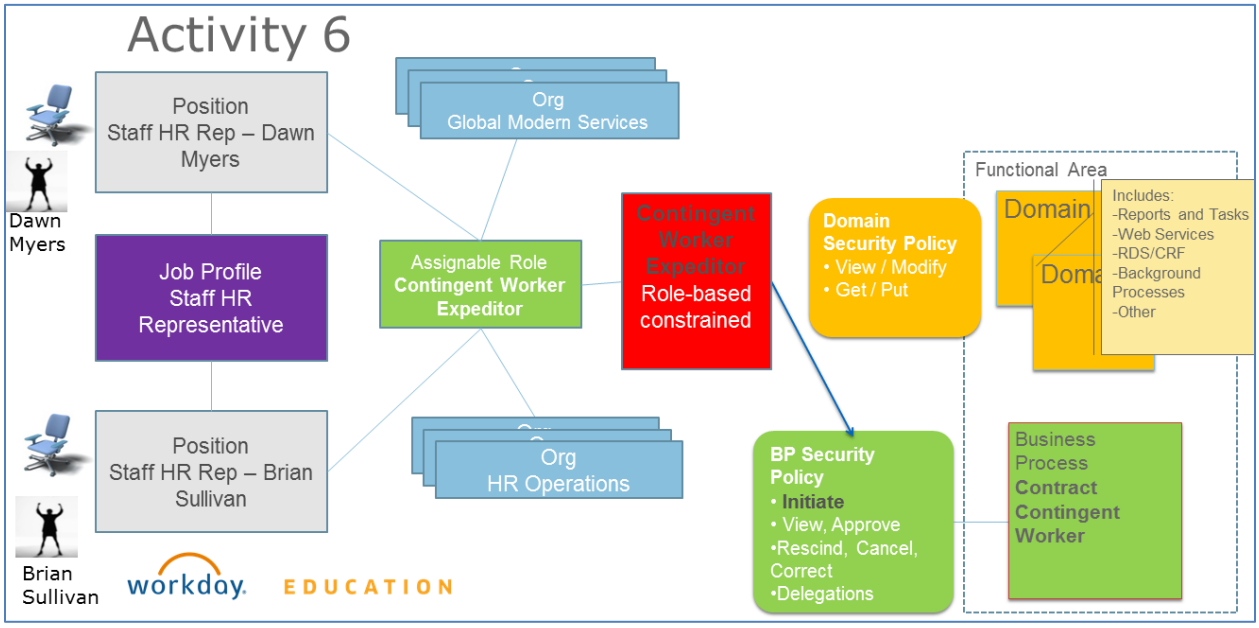
15. Click **Done**

(End of Activity)

ACTIVITY 6B – ADD CONTINGENT WORKER EXPEDITER TO THE BUSINESS PROCESS SECURITY POLICY

Now that you have created the new Contingent Worker Expediter security group you must modify the business process policy Contract Contingent Worker, activate, and test your changes.

OVERVIEW



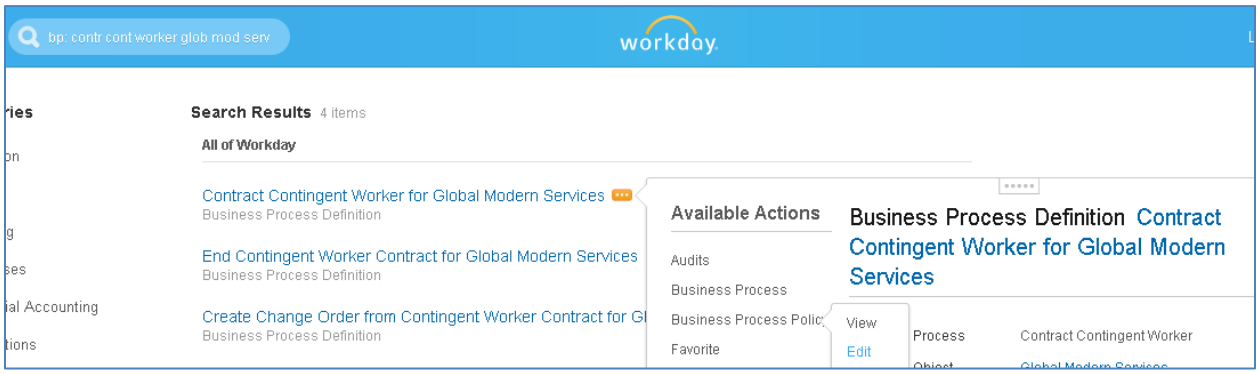
Logan McNeil will perform the following actions:

1. Business Process Security for Functional Area
2. Activate Pending Security Policy Changes
3. Test

TASK 1: EDIT THE BUSINESS PROCESS SECURITY POLICY

As Logan McNeil (lmcneil)

1. Search for 'bp: contr cont worker glob mod serv'
2. Click the related action icon next to the business process definition for *Contract Contingent Worker for Global Modern Services*
3. Select **Business Process Policy** > **Edit** task



4. Go to the section **Who Can Start the Business Process (Contract Contingent Worker)**
   a. Remove **HR Partner** and **HR Partner (By Location)** security groups
   b. Add your new **Contingent Worker Expeditor** role-based constrained security group

5. Click **OK** to save the changes, then click **Done**

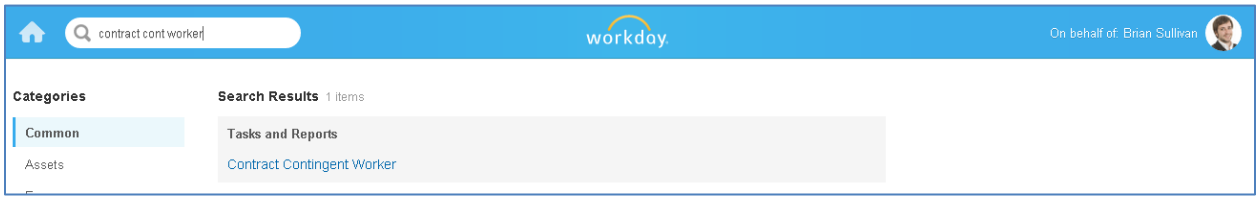
TASK 2: ACTIVATE PENDING SECURITY POLICY CHANGES

1. From the search box, run the task: **Activate Pending Security Policy Changes**
2. Enter '*Activity 6*' into the comments section
3. Click the **OK** button
4. Click the **Confirm** checkbox
5. Click the **OK** button

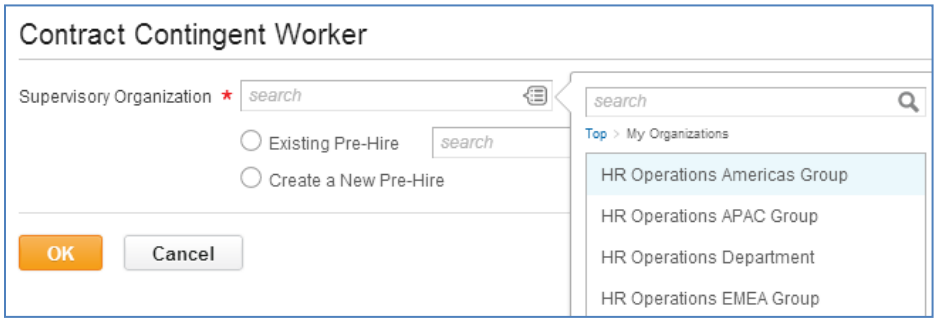
TASK 3: TEST THE SECURITY CHANGES

Start proxy as Brian Sullivan (bsullivan)

1. Proxied as Brian, from the search box, run the task: **Contract Contingent Worker** *(Brian should now have access to this task that initiates the bp: Contract Contingent Worker)*



2. When Brian executes this task, note how he is constrained to certain supervisory organizations. He only has access to target instances in the **HR Operations Department** as well as its subordinate organizations given the role-based constrained security group organization access rights.

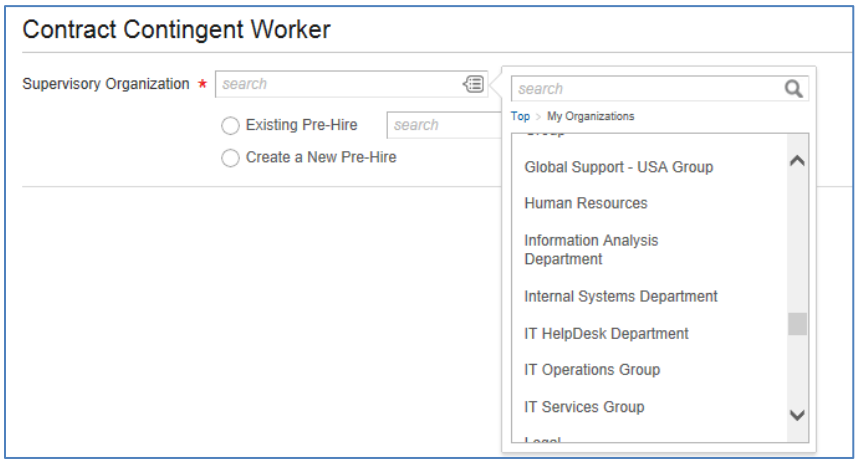


3. He cannot complete the contracting of contingent workers into other organizations (e.g. Accounts Payable Department) since he does not have access to the securable items (e.g. positions) in that organization.
4. Click **Cancel**

5. **Start proxy** as Dawn Myers (dmyers)

6. Proxied as Dawn, search for and execute the **Contract Contingent Worker** task.

7. From the Supervisory Organization prompt, under My Organizations, see how Dawn can pick any supervisory organization except the HR Operations Department and its subordinates. The role-based constrained security group organization access rights give her access to 'unassigned subordinates' and since the HR Operations Department is assigned to Brian Sullivan, Dawn does not have access to secured target items in those organizations.



Note: Though Dawn does not see Brian's assigned organizations in the My Organizations prompt as expected, she can enter the HR Operations department organization by name since the organization itself is visible in the tenant. Her access constraint will take effect when she tries to access target instances in the HR Operations department. She will not have access to the secured items in those organizations, e.g. the positions to contract a pre-hire.

8. **Stop proxy**

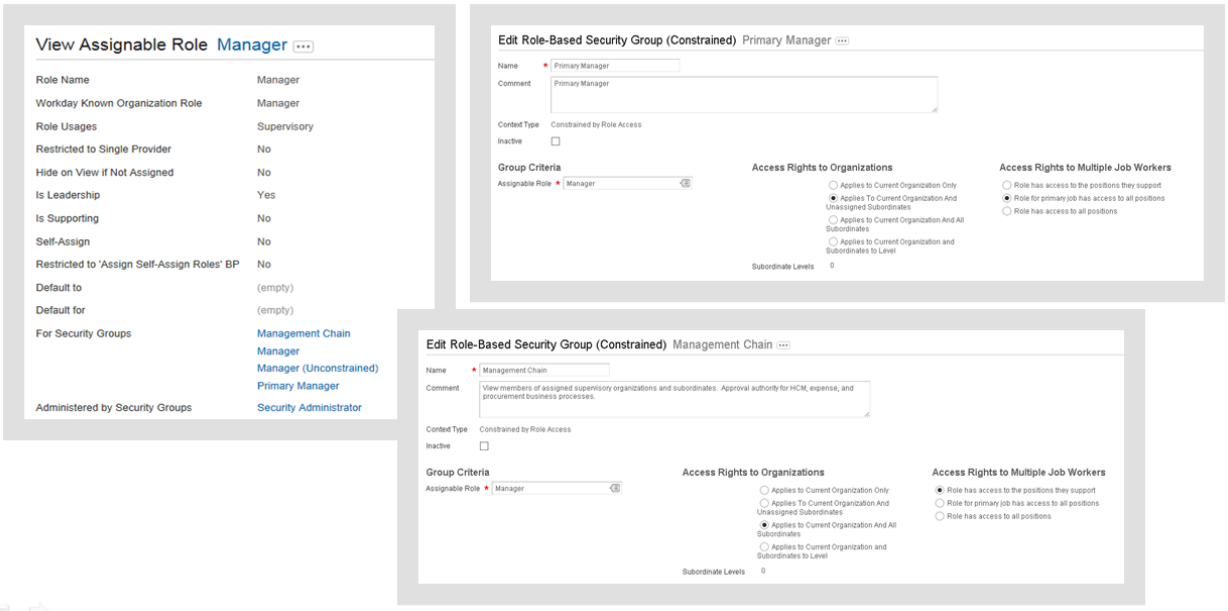
(End of Activity)

ONE ROLE, MULTIPLE SECURITY GROUPS

Each role-based security group can only reference one role. However, you can have several role-based security groups for the same role, where each security group has a different constraint configuration.

This is easily shown with the **Manager** role. You can use the same Manager role in a number of role-based security groups, to express whether the user:

1. Has a direct relationship to the worker (role based constrained security group: Manager)
2. Is in the organization chain for the worker (role based constrained security group: Management Chain)
3. Has a direct relationship to which of the worker's multiple positions (role-based constrained security group: Primary Manager)
4. Is anyone in the role (role based unconstrained security group: Manager (Unconstrained))



WALKTHROUGH

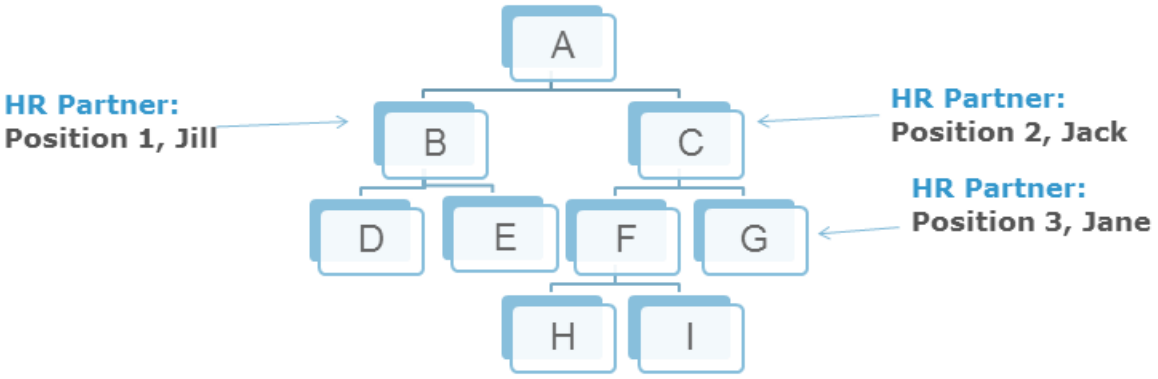
Using the graphic below, determine who has access to what, dependent on the configuration of the constraint.

COO = Current Organization Only

COUS = Current Organization and Unassigned Subordinates

COAS = Current Organization and All Subordinates

Role	Security Group	Constraint	Members of Security Group	Domain or BP Sec Policy Access	Resulting access
HR Partner	HR Partner1	COO		Initiate Hire	
HR Partner	HR Partner2	COUS		Worker Data: Personal Data	
HR Partner	HR Partner3	COAS		Initiate Request Comp Change	
HR Partner	HR Partner4	Unconstrained		Worker Data: Emergency Contacts	



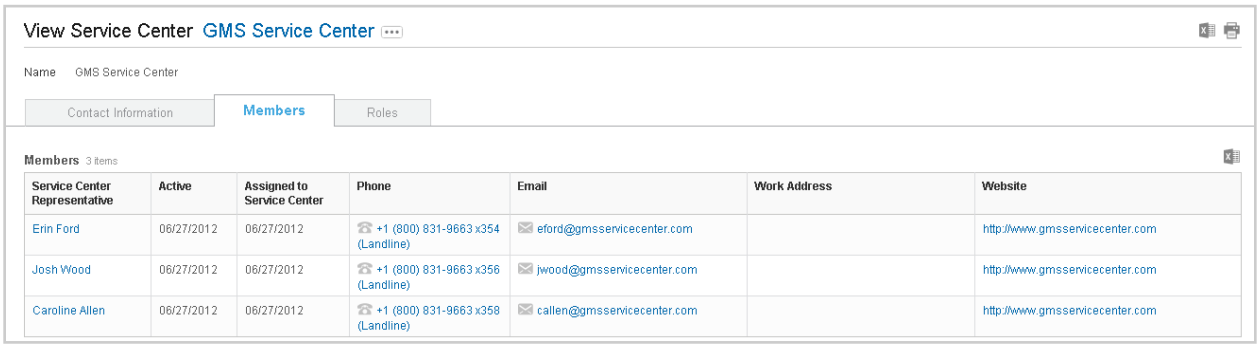
The completed walkthrough solution can be found in the back of this guide.

SERVICE CENTER-BASED SECURITY GROUPS

Workday enables you to grant **third-party users access to Workday** to perform configured tasks using service center based security groups. A common use case is an outsourced helpdesk, where helpdesk users need access to Workday to reset and manage workday accounts for Workday users. These helpdesk staff **users are not workers in the Workday tenant** and are not in your organization headcounts. These third party users need to be able to login to the Workday tenant and need to perform certain Workday tasks with access to Workday data.

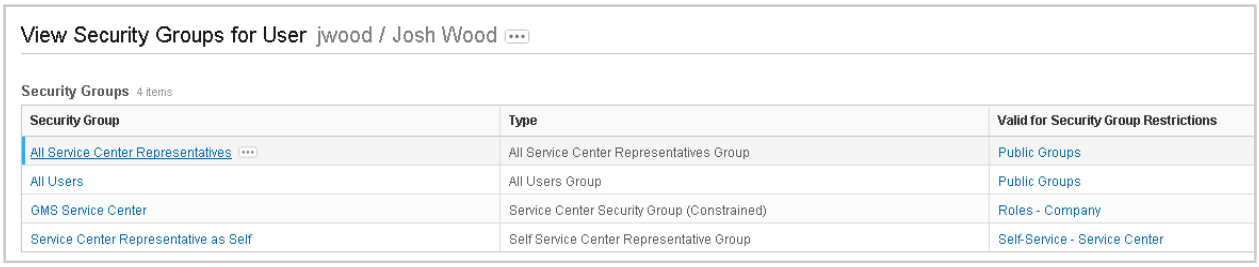
Service Center representatives can be given limited access to Workday to support specific organizations only, using **Service Center Security Group (constrained)**. You can also configure unconstrained service center based security groups. When creating a service center based security group, you must specify a service center as the security group's criteria.

To use service-center based security groups, you must first **define a service center** and **then create service center representatives for that service center**. Service Center representatives will show as members of the Service Center.



When you create a service center representative you must also **create a Workday account** for the service center representative. These service center representative accounts will get some Workday delivered **automatically assigned security groups**, such as:

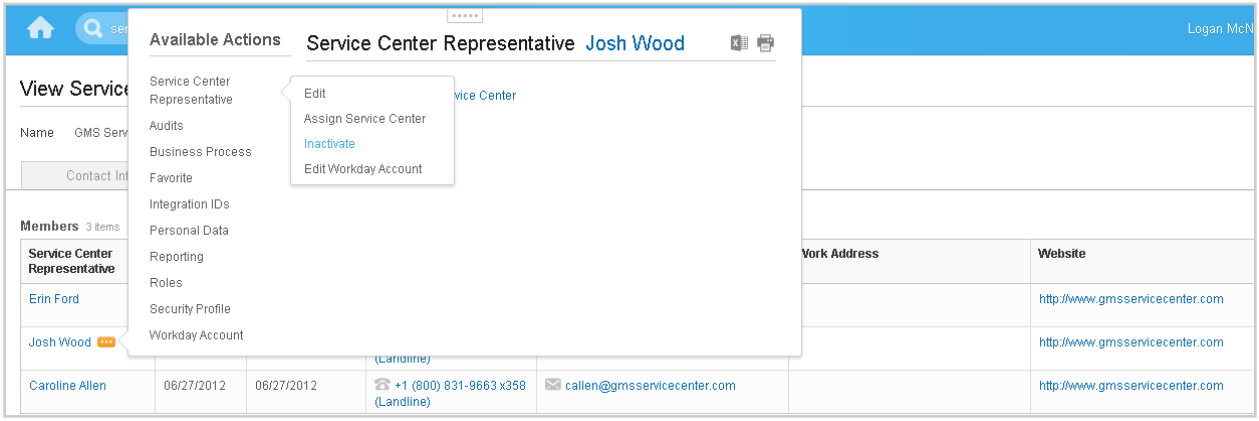
- **Service Center Representative as Self**
- **All Service Center Representatives**
- **All users**



You can **inactivate Service Center Representatives** with the *Inactivate Service Center Representative* business process. Different *Inactivate Service Center Representative* business process definitions can be created for each Service Center.

Inactivating a representative:

- Disables the Workday account for the representative.
- No longer actively associates the representative with any Service Center.
- Removes the representative from delegation and all Service Center type security groups.



SERVICE CENTER BASED SECURITY GROUP DEPLOYMENT

1) **Create a Service Center** – a service center must exist.
2) **Create Service Center Representatives** for the service center. Service Center Representatives will be for each third party user.
3) **Create a Workday Account** for each Service Center Representative so that they can sign in to the tenant.
4) **Create a Service Center based security group** (Constrained or Unconstrained) for the Service Center.
    a. **Members of the security group will be all service center representatives in that service center.**
    b. Configure access rights to target instances for defined organizations if constrained.
5) **Configure the Service Center Based security group in needed domain or bp security policies**.
6) Activate
7) Test

ACTIVITY 7A – CREATE SERVICE CENTER CALLED OUTSOURCED GLOBAL HELPDESK & REPRESENTATIVE

Scenario: Team members of a 3rd party IT outsourcing company need access to update worker account passwords. They will not be set up in Workday as workers. They should not be able to create new Workday accounts.

TASK 1: CREATE THE SERVICE CENTER AND SERVICE CENTER REPRESENTATIVE

As Logan McNeil (lmcneil)

1. Search for 'cr serv cent'
2. Select the **Create Service Center** task
3. Define the Service Center as follows:

Field Name	*Entry Value*
Name	Global Outsourced IT HelpDesk

4. Click the **OK** button
5. Click the related action icon for the service center
6. Select **Service Center -> Create Service Center Representative**
7. Enter data as follows:

Field Name	*Entry Value*
First Name	John
Last Name	Johnson

8. Click the **OK** button to save the changes
9. Click **Done**

TASK 2: CREATE WORKDAY ACCOUNT FOR SERVICE CENTER REPRESENTATIVE

1. From the search box, enter **servicecenter: John** *(servicecenter: is the search prefix you can use to search for service centers or service center representatives. Remember that search prefixes must be lower case. For a full list of search prefixes, enter ? in the search box and hit enter.).*

2. Click the related action icon next to the name of the representative

3. Select **Security Profile -> Create Workday Account**

4. Enter Account Information as follows:

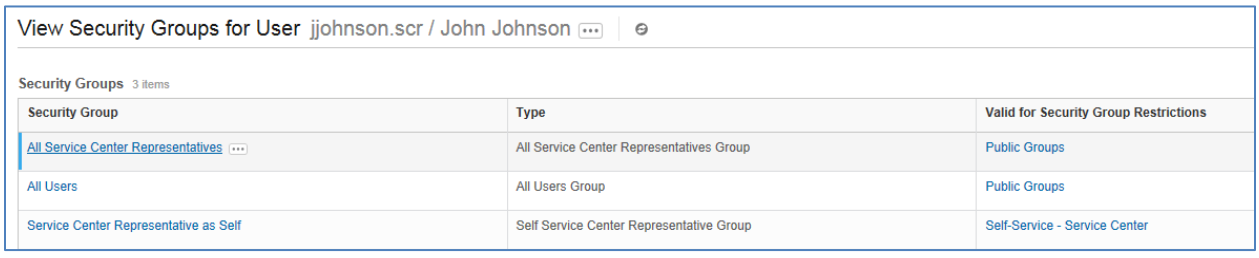
Field Name	***Entry Value***
User Name	jjohnson.scr
New Password	<use class assigned password>
Re-Enter Password	<use class assigned password>
Require New Password at Next Sign In	Deselect checkbox

5. Click the **Submit** button

6. Click the **Done** button

7. From the search box, run **View Security Groups for User**, and select *jjohnson*.

8. See how John's Workday account has several automatically assigned security groups, allowing John to do what, for example, All Users can do, and what All service center representatives can do.



(End of Activity)

ACTIVITY 7B – CREATE AND DEPLOY SERVICE CENTER-BASED SECURITY GROUP

Now that you have created the Service Center and Service Center Rep, create the security group and edit the domain security policy (System –Security Administration - Workday Accounts).

OVERVIEW

Logan McNeil will perform the following actions:

1. Create Security Group
2. Edit Domain Security Policy
3. Activate
4. Test Membership

TASK 1: CREATE THE SECURITY GROUP

As Logan McNeil (lmcneil)

1. Search for '*cr sec gr*'
2. Select the **Create Security Group** task
3. Set the type and name as follows:

Field Name	***Entry Value***
Type of Tenanted Security Group	Service Center-Based Security Group (Constrained)
Name	Outsourced IT

4. Click the **OK** button
5. Configure the Security Group as follows:

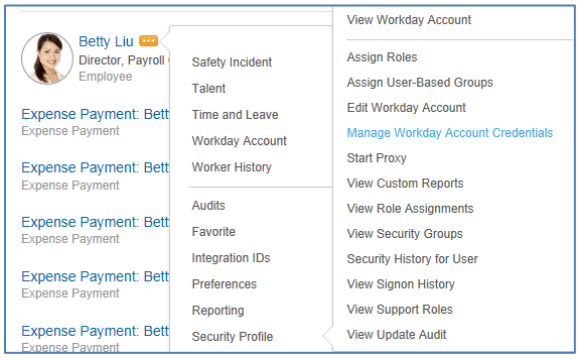
Field Name	***Entry Value***
Service Center	Global Outsourced IT HelpDesk

Organizations	All Organizations by Type > Supervisory ->Global Modern Services > **Human Resources**
Applies to Current Organization and All Subordinates	Selected

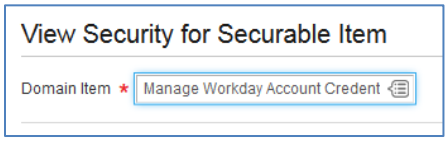
6. Click the **OK** button, then click the **Done** button

TASK 2: EDIT THE DOMAIN SECURITY POLICY

1. Passwords are changed using the **Manage Workday Account Credentials** task. Let's now determine which domain(s) secure this item.

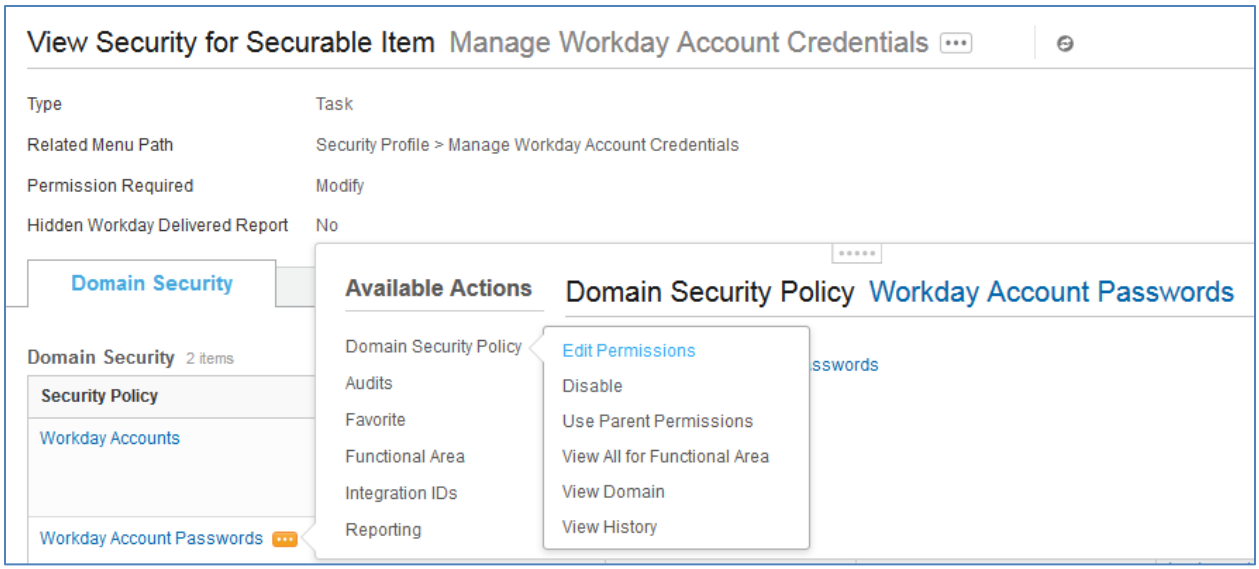


2. Run the report **View Security for Securable Item** for the item: *Manage Workday Account Credentials* task.



3. Click OK.

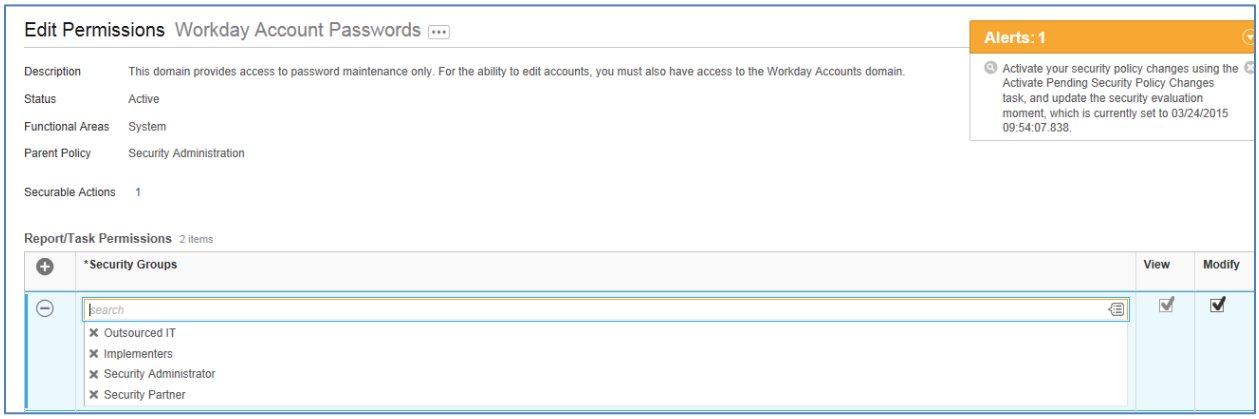
4. From the *Workday Account Passwords* security policy, use related actions and select **Domain Security Policy > Edit Permissions**



5. Remove the following security group: **All Service Center Representatives**

   This unconstrained security group allows any service center representative access to the tasks for anyone. **Since we want to constrain the access, we are deleting this group and will next add our constrained security group instead**.

6. Add the **Outsourced IT** security group for **View and Modify** access



7. Click **OK** to save the changes

8. Click the **Done** button

TASK 3: ACTIVATE PENDING SECURITY POLICY CHANGES

1. Search for '*activate*"

2. Click the **Activate Pending Security Policy Changes** task

3. Enter '*Activity 7*' into the comments section

4. Click the **OK** button

5. Click the **Confirm** checkbox

6. Click the **OK** button to activate the changes

(End of Activity)

ACTIVITY 7C – TEST SERVICE CENTER-BASED SECURITY

Sign in as a Service Center Rep and verify that you have access to change passwords for the organization you support.

TASK 1: TEST SERVICE CENTER ACCESS TO MANAGE PASSWORDS

Sign in as John Johnson (jjohnson.scr) (Proxy session is not available since John is not an employee – remember the scope of the proxy access policy we configured in Activity 4 only allows employees to proxy on behalf of employees. If we had allowed proxy on behalf of 'All users' instead, we could have proxied as John Johnson.)

1. Enter login information as follows:

Field Name	***Entry Value***
User Name	jjohnson.scr
Password	<use class assigned password>

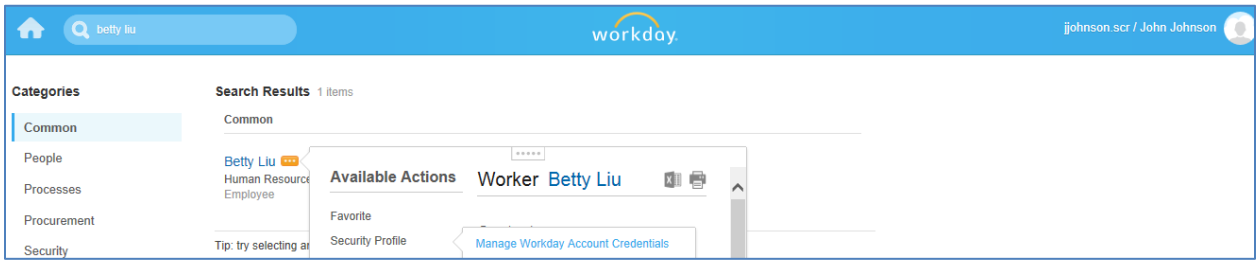
2. Configure challenge questions, using the drop-down menu as follows:

Field Name	***Entry Value***
What city were you born in?	Boston
What city was your mother born in?	Boston

3. And click OK.

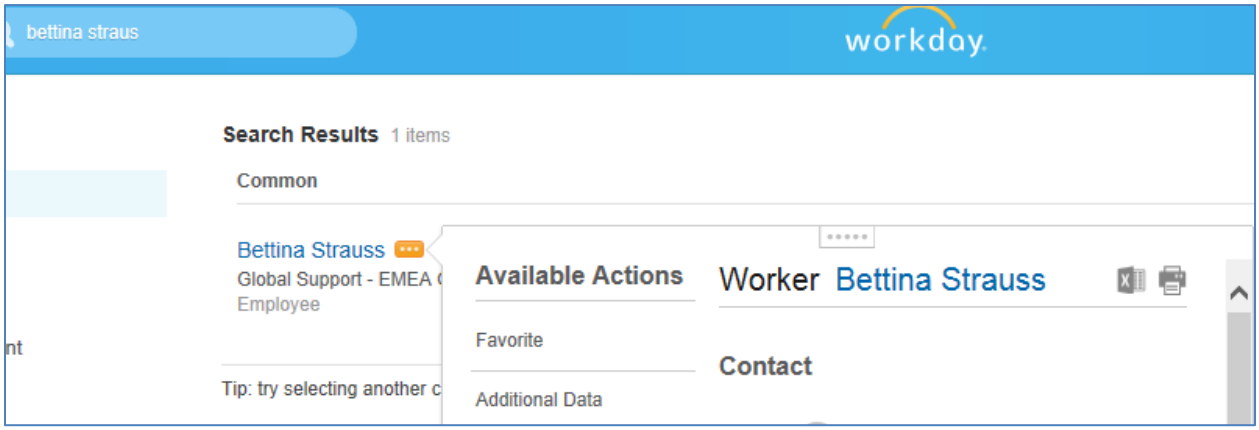
4. Search for *'betty"* and click on the related action.

5. Note John's access under **Security Profile**, and the task **Manage Workday Account Credentials**



6. Search for Bettina Strauss.

7. Note there is no Security Profile option. Why? Bettina is a member of Global Support – EMEA Group organization, which John Johnson does not support. Recall that the Outsourced IT service center security group was constrained to Human Resources and subordinate organizations.

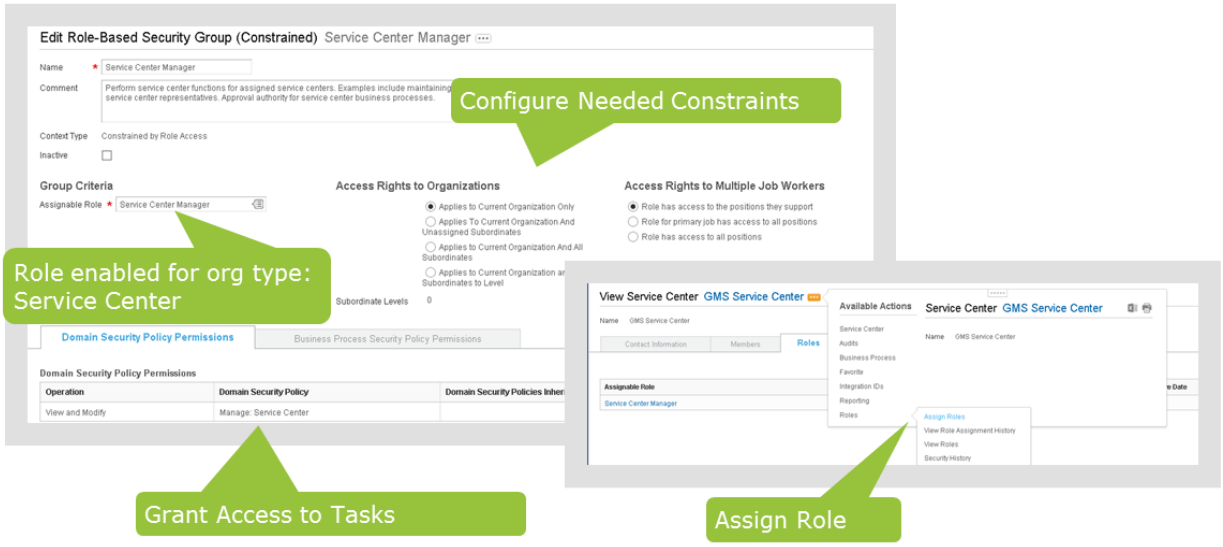


8. Sign Out

(End of Activity)

ROLES FOR SERVICE CENTERS

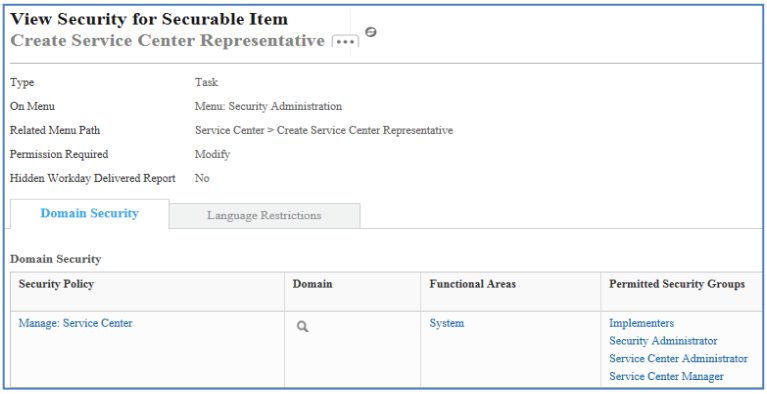
Since Service Centers are an organization type in Workday, you can **assign roles to Service Centers** to identify support or leadership staff for a service center. A common use case would be creating a role of **Service Center Manager**. This role can then be assigned to a position (or service center representative) and a role-based constrained security group can be leveraged to allow those in the role to, for example, create service center representatives for their assigned service center.



ACTIVITY 7D – OPTIONAL - CONFIGURE SERVICE CENTER MANAGER ROLE

Scenario: A new role is to be created called IT Service Center Manager. The IT Service Center Manager will have permission to create and manage service representatives for his service center. Jack Taylor will be assigned to this role.

Jack Taylor currently cannot access Create Service Center Representatives. Verify this by running the View Security for Securable Item report. Jack is not a member of these security groups. You could use the Test Membership action off each Permitted Security Group to verify.



Another option is to run the Security Analysis for Action report. You will find that Jack Taylor does not have permission to access create service center representative task.

TASK 1: MAINTAIN ASSIGNABLE ROLES

As Logan McNeil (lmcneil)

1. Search for 'maintain role' and click the **Maintain Assignable Roles** task
2. Add a row and configure the role as follows:

Field Name	***Entry Value***
Role Name	IT Service Center Manager
Enable for	Workday Organization Types > Service Center
Hide on View if Not Assigned	Do Not Check the Box
Restricted to Single Assignment	Check the box
Is Leadership/Is Supporting	Select Is Leadership
Assigned by Security Groups	Security Administrator

3. Click **OK**, then **Done**

TASK 2: CREATE SECURITY GROUP

1. Search for 'create sec gr'
2. Click on the **Create Security Group** task
3. Set the type and name as follows:

Field Name	***Entry Value***
Type of Group	Role-based Security Group (Constrained)
Name	IT Service Center Manager

4. Click the **OK** button
5. Configure the security group as follows:

Field Name	***Entry Value***
Group Criteria > Assignable Role	By Organization Type > Service Center > IT Service Center Manager
Access Rights to Organization	Applies to Current Organization and Unassigned Subordinates
Access Rights to Multiple Job Workers	Role has access to the positions they support

6. Click **OK** to save
7. Click **Done**

TASK 3: ASSIGN ROLE

1. Search for 'servicecenter: *glob out'*
2. From the related action icon on the Global Outsourced IT HelpDesk, select **Roles > Assign Roles**.
3. Click the **OK** button to accept today as the Effective Date
4. Click to add a new row in the **Assign Roles** section
5. Click on the **Role** prompt and select **IT Service Center Manager**
6. Click on the **Assigned To** prompt to select Job Profile prompt Manager, IT HelpDesk > Jack Taylor

7. Click **OK**, then click **Done**

TASK 4: EDIT SECURITY POLICY

1. Which security policy do we need to edit?
2. Run **View Security for Securable Item** for the **Create Service Center Representative** task.
3. From the **Manage Service Center** Security Policy, use related actions and select Domain Security Policy > Edit Permissions
4. Add **IT Service Center Manager** to the list of security groups with **View and Modify** access
5. Click **OK** and **Done**
6. Search for '*activate'*
7. Click the **Activate Pending Security Policy Changes** task
8. Enter 'Activate IT Service Center Manager'
9. Click **OK**
10. Click the **Confirm** checkbox
11. Click **OK**

TASK 5 TEST SERVICE CENTER ROLE

1. **Start proxy** as Jack Taylor (jtaylor)
2. Search for 'create serv cent rep'
3. Jack can now create service center representatives for Global Outsourced IT HelpDesk.
4. Cancel and Stop proxy

(End of Activity)

JOB-BASED SECURITY GROUPS

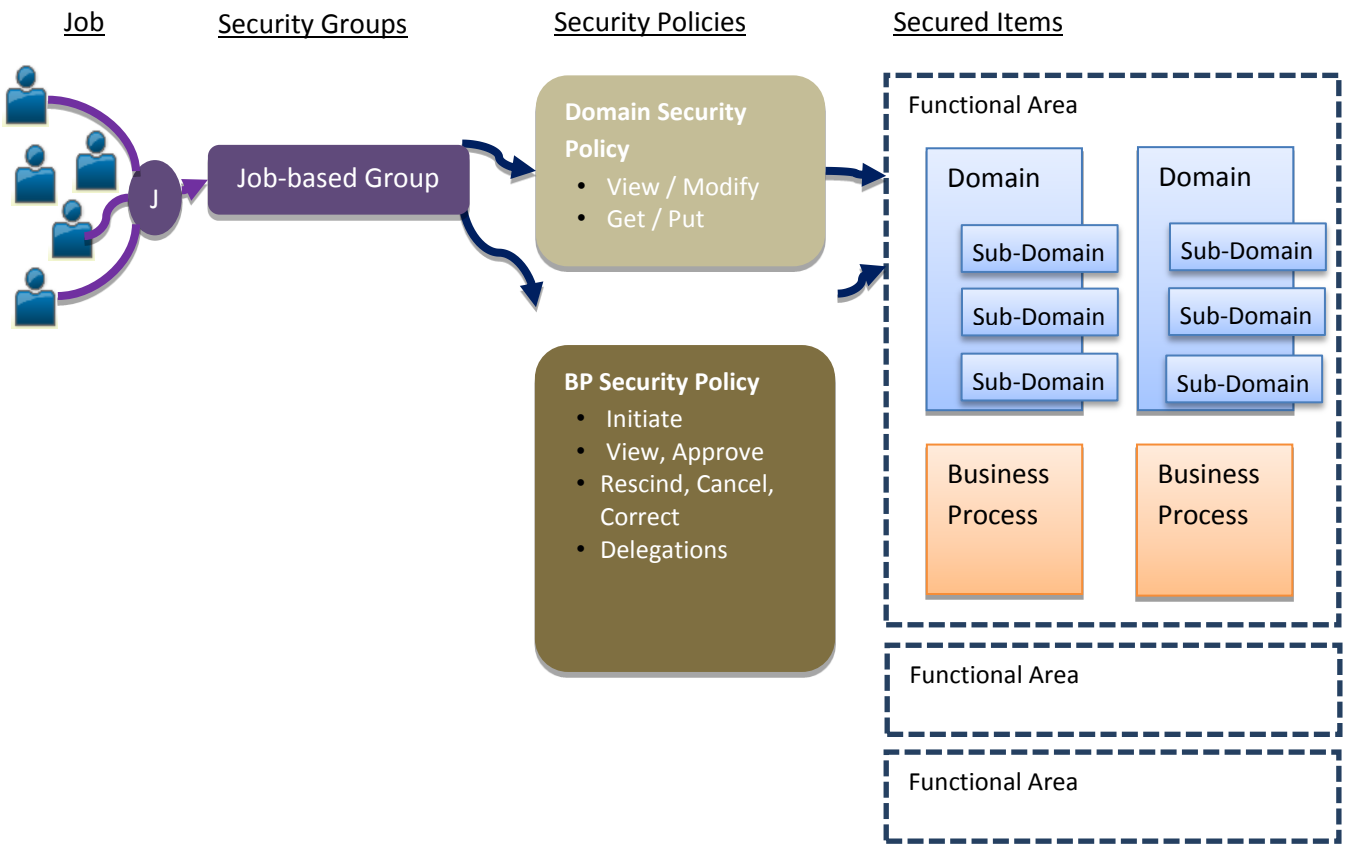
Job-based security groups can be used to identify members based on **job details** such as job profile, job family, management level or exempt vs. non exempt jobs. They can be defined as either **constrained or unconstrained**. **Membership is automatically derived** for workers that match the defined job criterion. System users in this group can only be workers since they require job-relevant criteria. The selection will be made from currently active workers.

Relevant job criteria are:

- Job Profile
- Job Category
- Job Family
- Management Level
- Work Shift
- Include Exempt Jobs
- Include Non Exempt Jobs

Examples of Job-Based Security Groups are:

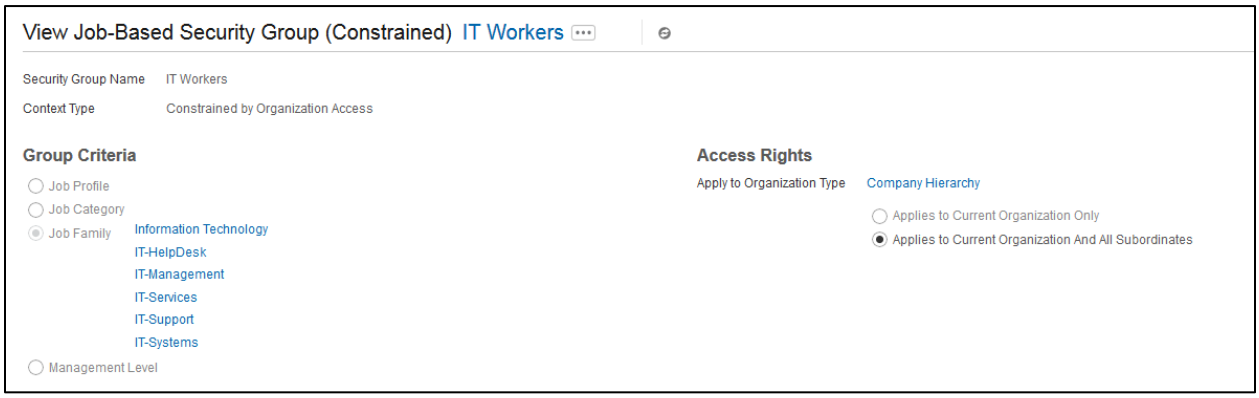
- Employee Type - Exempt; non-Exempt
- Job Profile - CEO; CHRO
- Job Family - HR-Payroll
- Management Level – Vice President



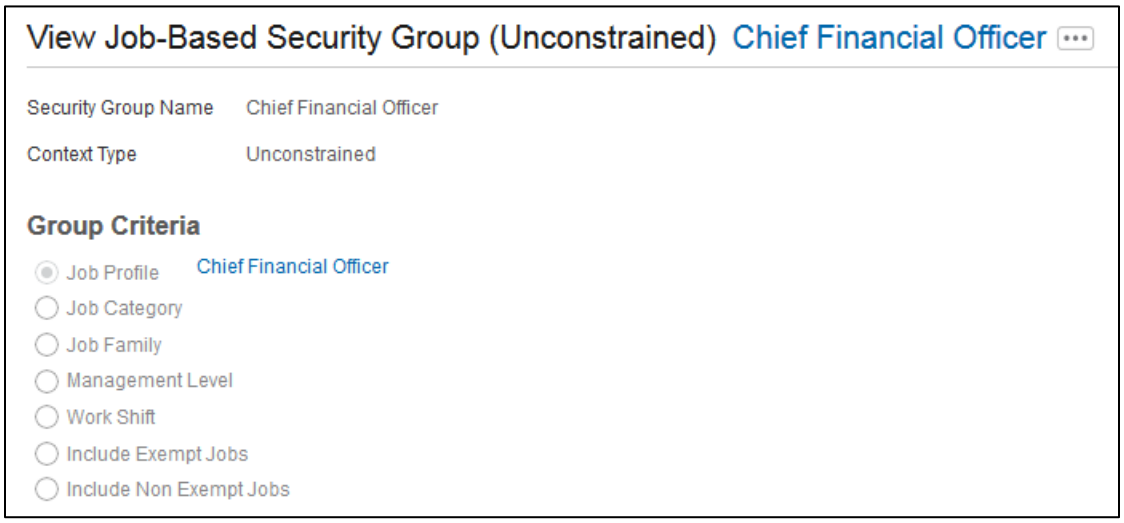
Note: You can only specify and grant access based on one job criterion in a job-based security group. For example, you can create a job-based security group for Exempt Employees, but not one for Exempt employees AND Management Level: Vice President.

In the following example, using a **job-based constrained** security group, we are identifying members as those in the IT related job families. We are then also constraining them to target instances in the Company Hierarchy that they are currently in and all subordinate nodes in the hierarchy.

This security group will identify IT Workers constrained to their company hierarchy organization.



If we look at a **job-based unconstrained** example, we are identifying members based on a job criterion, similar to the above example, however, if we use this security group in domain or business process security policies, access will be unconstrained. Workday will not attempt to enforce target constraints based on organization.



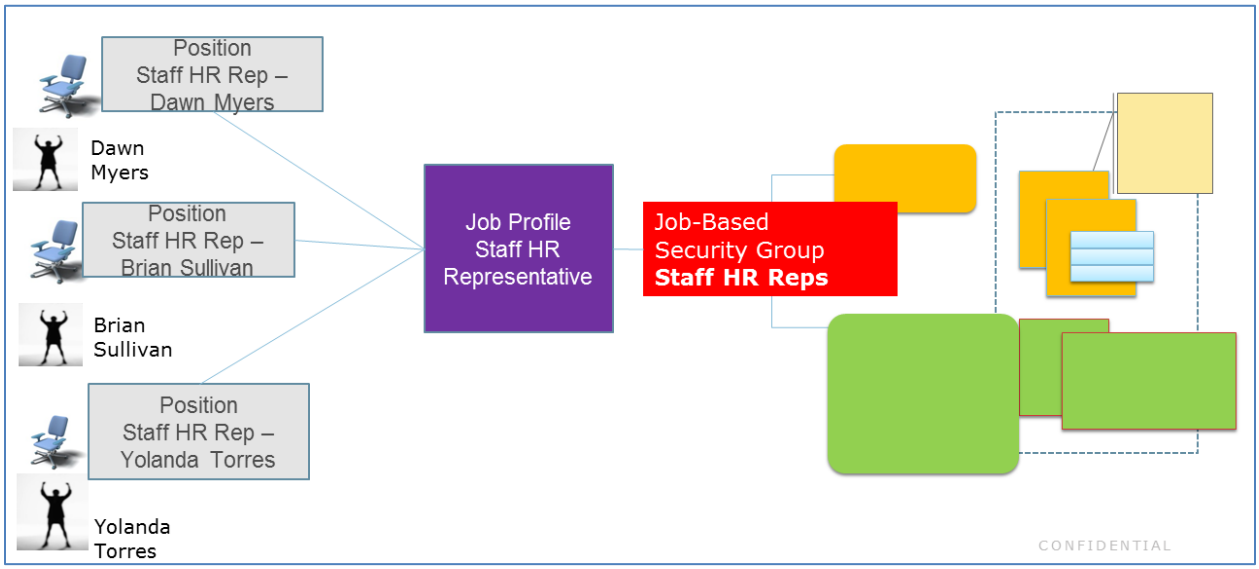
HOW IS JOB BASED DIFFERENT THAN ROLE BASED?

Role-based security groups derive membership based on role assignment to a position. Positions represent a 'chair' that a worker is filling and 'sitting in'. Positions have job details, e.g. an associated job profile. **Job based security groups derive membership based on the job details**.

In the example, below, Dawn Myers the worker is in a position **Staff HR Representative – Dawn Myers**. This position, ties to the job profile: Staff HR Representative. Her job details show a Management level of 8- Individual Contributor.

If we look at the worker, Brian Sullivan. Brian sits in the chair or position is **Staff HR Representative – Brian Sullivan**. This position is tied to the same job profile, Staff HR Representative. Brian's job details also show a management level of 8-individual contributor.

Using job based security groups, we can identify workers based on job details such as job profile or management level. The example below shows a job based security group identifying workers in the job profile: Staff HR Representative. Dawn, Brian and Yolanda would be automatic members.



CREATE AND DEPLOY JOB-BASED SECURITY GROUP

1. Run Create Security Group task
2. Identify needed access to domains or business processes
3. Edit Security Policies
4. Activate Pending Security Policy Changes
5. Test

ACTIVITY 8 – CREATE AND DEPLOY JOB-BASED SECURITY GROUP

Scenario: Expense reports should be approved by director level workers for the given company

OVERVIEW

Logan McNeil will perform the following actions:

1. Create Security Group
2. Test Membership
3. Edit Business Process Security Policy to allow new security group to approve
4. Activate
5. Edit Business Process Definition
6. Test

TASK 1: CREATE THE SECURITY GROUP

As Logan McNeil (lmcneil)

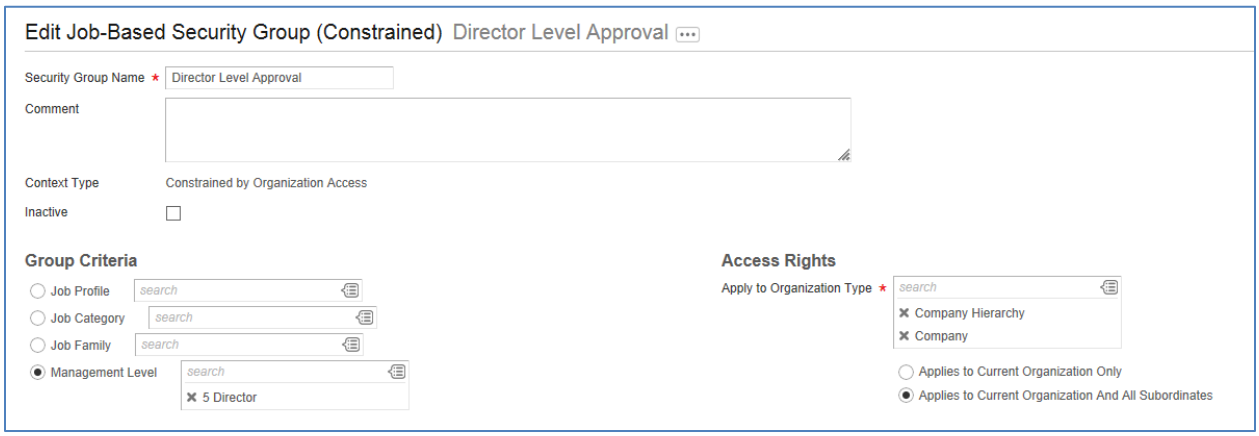
1. Search for and execute **Create Security Group** task
2. Define the Security Group as follows:

Field Name	***Entry Value***
Type of Tenanted Security Group	Job-Based Security Group (Constrained)
Name	Director Level Approval

3. Click the **OK** button
4. Edit the Job-Based Security Group (Constrained) as follows:

Field Name	***Entry Value***

Group Criteria > **Management Level**	5-Director
Organization Access	Company Company Hierarchy Current Organization and all subordinates



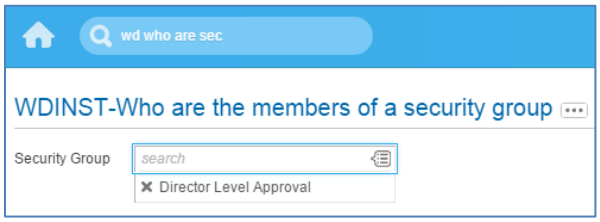
5. Click the **OK** button to save the changes

6. Click the **Done** button

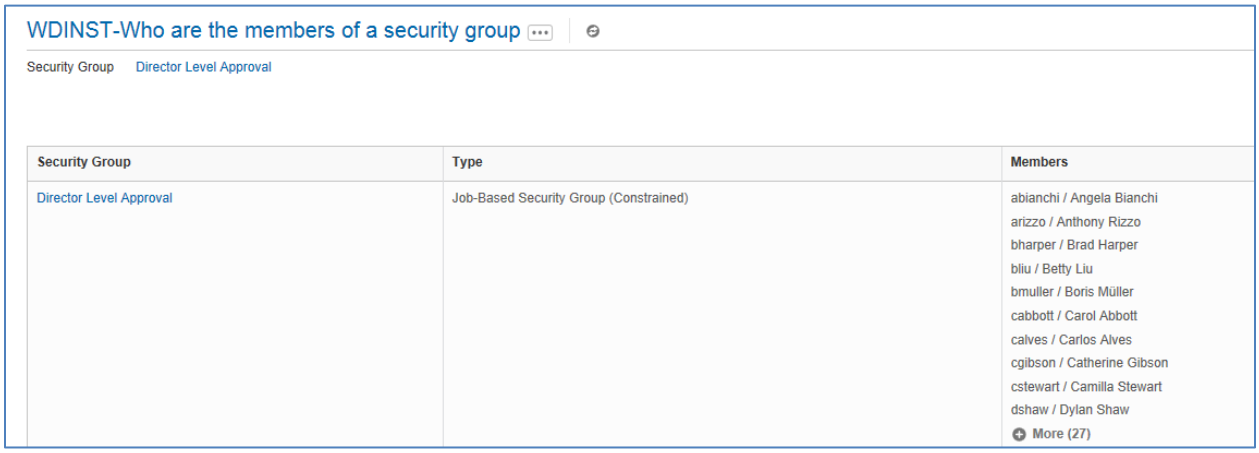
TASK 2: SEE SECURITY GROUP MEMBERSHIP

1. With Job-based security groups, members are automatically derived given their job details.

2. Run a custom report in the tenant: **WDINST – Who are the members of a security group**



3. See the members. Members shown are all workers in the tenant in positions where the job profile is a director level.



4. We will focus on 2 members: Camila Stewart and Carlos Alves.

   a. Camila Stewart is in the Company, Global Modern Services, PLC (U.K.)

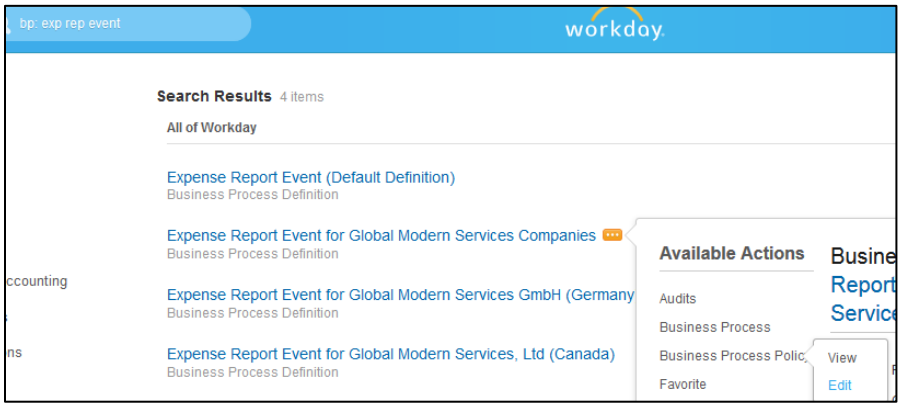
   b. Carlos Alves is in the Company, Global Modern Services SA (Brazil)

TASK 3- EDIT BUSINESS PROCESS SECURITY POLICY

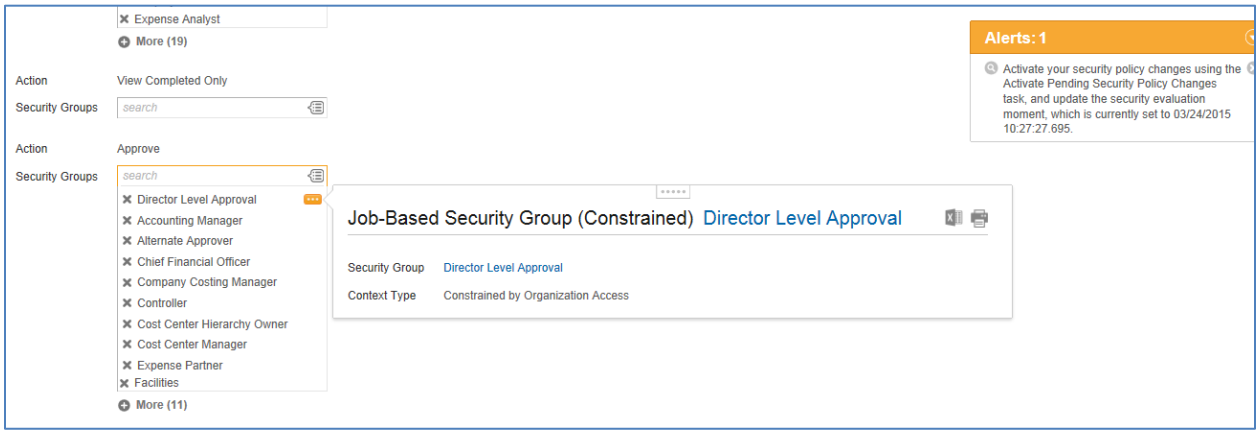
1. In a business process definition, you can only route approval steps to permitted security groups. Permitted security groups for approval steps are configured in the business process security policy. If we want to route an approval step to our new job based, Director Level Approval, security group, we must first configure it in the bp security policy as an allowed security group for approvals.

2. From the search box, search for the **bp: expense report event**

3. Using related actions off of any of the definitions for this bp type (remember there is **only one security policy per bp type**, not per bp definition copy), select **Business Process Policy** > **Edit** task



4. Scroll down to find the **Approval section** and add your security group, **Director Level Approval**.



5. Click **OK** to save the changes

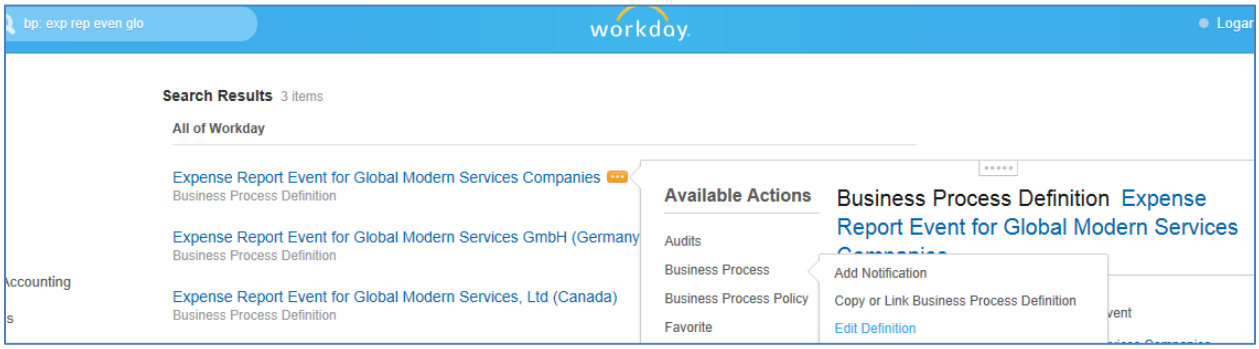
6. Click the **Done** button

TASK 4: ACTIVATE PENDING SECURITY POLICY CHANGES

1. From the search box, run the task: **Activate Pending Security Policy Changes**
2. Enter '*Activity 8*' into the comments section
3. Click the **OK** button
4. Click the **Confirm** checkbox
5. Click the **OK** button to activate the changes

TASK 5: EDIT THE BUSINESS PROCESS DEFINITION

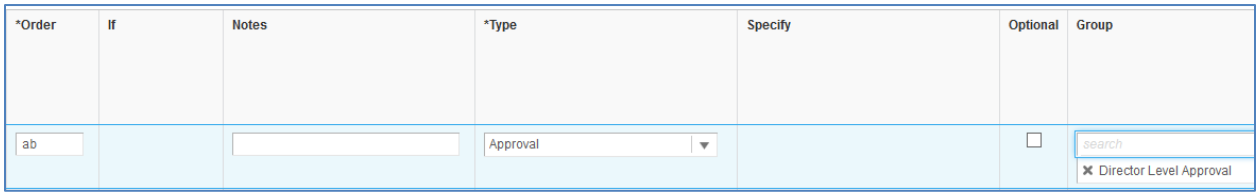
1. Search for 'bp: Expense Report Event Glob'
2. Use the related action icon off of the business process definition for **Expense Report Event for Global Modern Services** and select **Business Process** < **Edit Definition** task



3. Click **OK** to accept today as the Effective Date
4. Click the icon to add a new step
5. Configure the step as follows:

Field Name	***Entry Value***
Order	Ab
Type	Approval
Group	Director Level Approval *(Security groups shown in the prompt for this*

approval step are those with Approval permissions in the bp security policy)



6. Click the **OK** button

7. Click the **Done** button

TASK 6: TEST

1. **Start proxy** as Benjamin Green (bgreen).

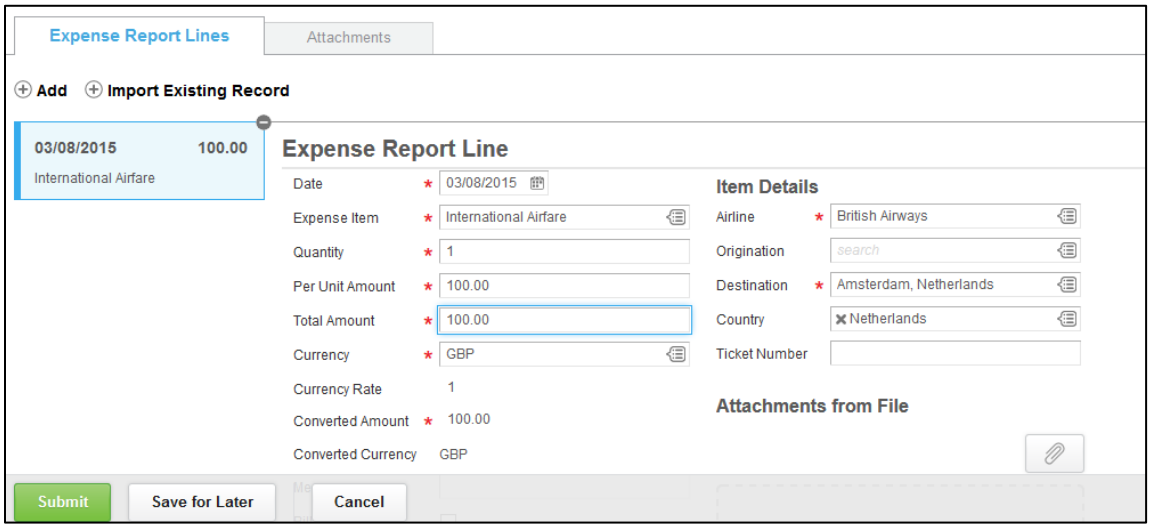
2. Benjamin is a worker in the UK. His company assignment is Global Modern Services, PLC UK. We will have Benjamin submit an expense report and see how Camilla, a director in the same company will receive the approval.

3. As Benjamin, from the search box, run **Create Expense Report**

4. **Click OK to start a new expense report**

5. Scroll down and enter a sample expense item as follows

    a. Expense Item: International Airfare
    b. Enter amount: $100
    c. Airline: British Airways
    d. Destination: Amsterdam

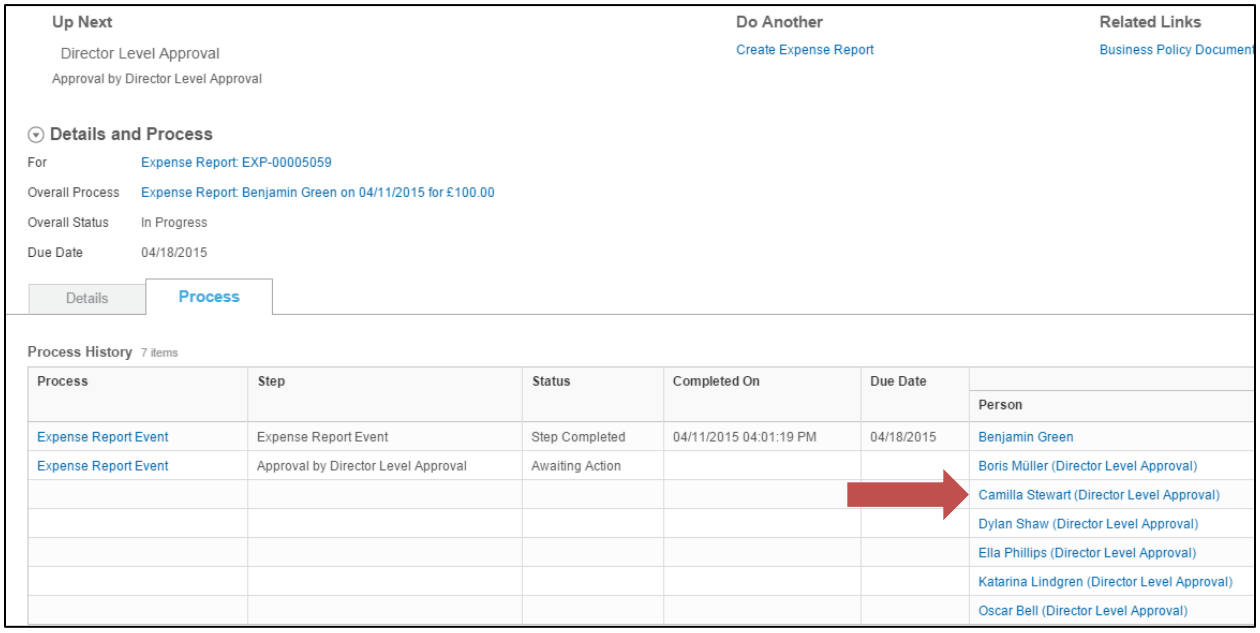


6. Click on Submit

7. Note the next step in the business process is your director level approval step.

8. Expand the **Details and Process** and click on the **Process** tab to see the awaiting recipients.

    a. The awaiting recipients are those in Director management levels that are in the Company: Global Modern Services, PLC UK (Benjamin's company and company hierarchy).



9. Click Done.

10. **Start proxy** as Carolina Souza (csouza). Carolina is a worker in Brazil.

11. As Carolina, from the search box, run **Create Expense Report**

12. **Click OK to start a new expense report**

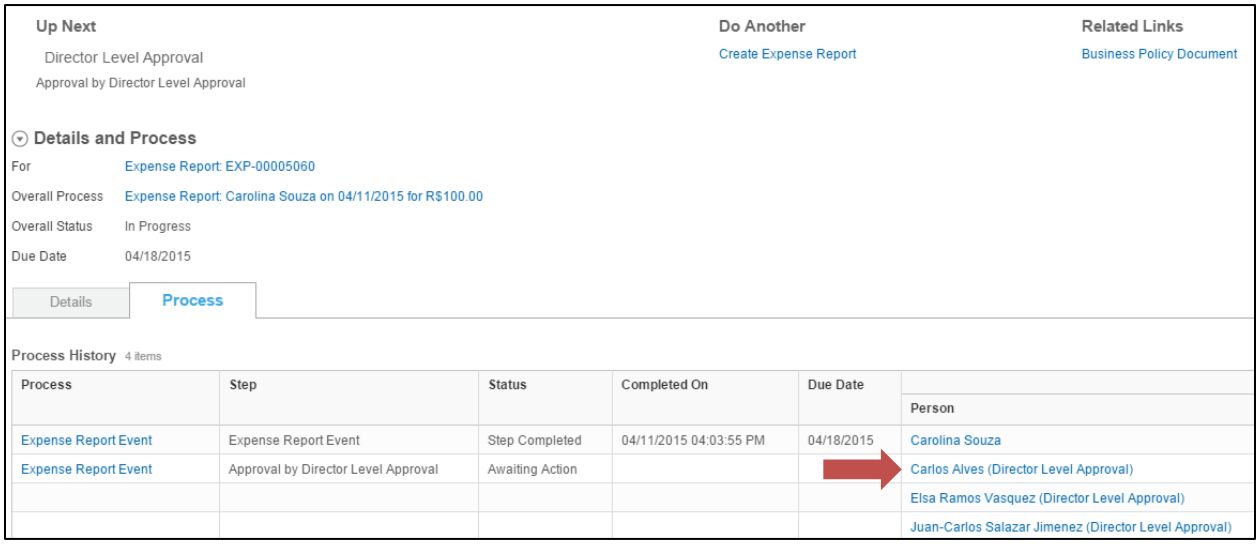
13. Scroll down and enter a sample expense item as follows

    a. Expense Item: International Airfare
    b. Enter amount: $100
    c. Airline: American
    d. Destination: Las Vegas, United States of America

14. Click on **Submit**

15. Note the next step in the business process is your director level approval step. Expand the **Details and Process** and click on the **Process** tab to see the awaiting recipients.

a. The awaiting recipients are those in Director level management jobs that are in the Company: Global Modern Services, SA (Brazil) or company hierarchy. Note Carlos Alves. He is a worker in the Director management level in Company Brazil.



16. **Stop Proxy**

(End of Activity)

INTEGRATION SYSTEM SECURITY GROUPS

An Integration System security group is a group to which you add system users (accounts, not people) as members. This group does not have access to the user interface.

Workday's delivered integrations use web service operations (or web service tasks) to get data from Workday to include on outbound integrations, and to put data received from inbound integrations into Workday. Cloud Connect and Studio integrations require an Integration System User account for authentication and access to web service tasks. Each integration system must have its own Integration System User account. Integration System Users are always members of Integration System Security Groups (constrained or unconstrained); they cannot be included in any other type of security group.

In order for the integration to work correctly, the Integration System User's security group must have Put and Get access to the domains that contain the web service operations that interact with the necessary data.

Note: Enterprise Interface Builder (EIB) integrations are secured through the current user's logon credentials and do not require an integration system user account.

Workday recommends, as a security best practice, that you set up integrations (RaaS, EIB, public API) and schedule them to be run by integration system users. In this way, your audit trails for the user interface track actions taken by people in Workday, thus ensuring that people are accountable for the changes or actions they take.

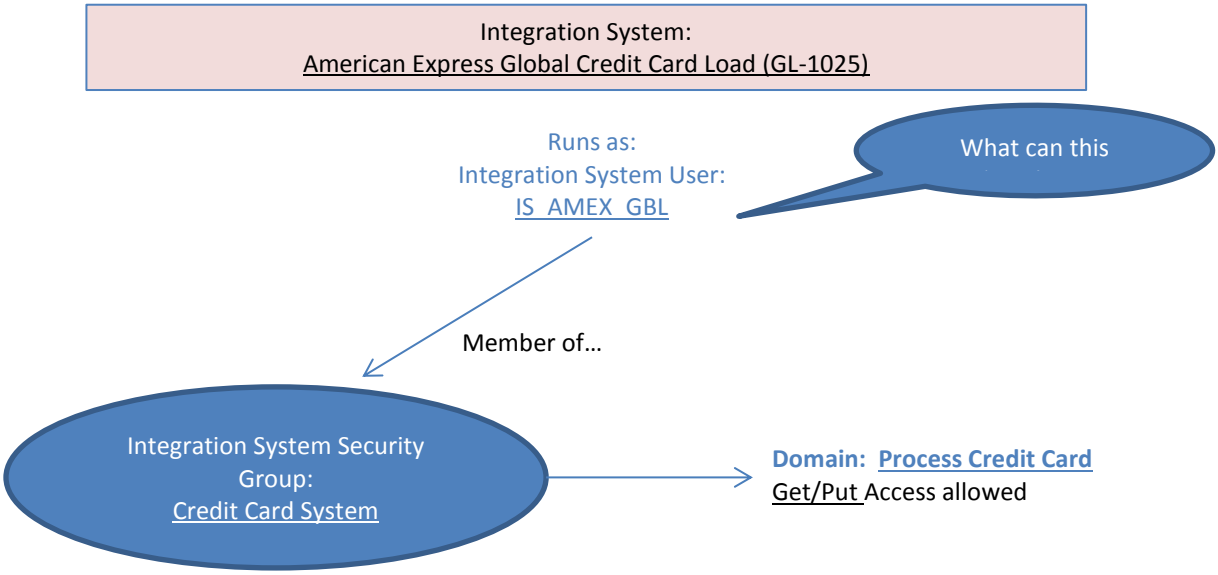
CONSTRAINED VS. UNCONSTRAINED INTEGRATION SECURITY GROUPS

An Integration System Security Group (Constrained) serves the same general purpose as an Integration System Security Group (Unconstrained). The only difference is that the constrained group type enables you to filter data results contextually based on Organization. For example, you can set up an integration that exports data only for workers who are members of a specific supervisory Organization. Filtering varies depending on how the data is accessed:

Public web service: Workday filters by element, not by row, based on the security of the underlying web service operation. For example a Workday integration that returns worker data will return one row for each worker, but may filter out some data for that worker. Data is filtered out if the underlying web service operation's element is secured to a different domain than the web service operation itself. To determine which elements (if any) are filtered out, see the Workday Public API documentation.

Reports as a Service (RaaS): Workday filters by row based on the security of the underlying report data source.

EXAMPLE:



CREATE AND DEPLOY INTEGRATION SYSTEM SECURITY GROUPS

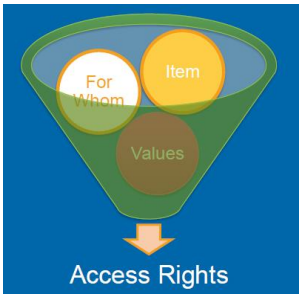
1. Create Integration System User accounts
2. Run Create Security Group task
3. Add Integration System Users to Group
4. Edit Security Policies
5. Activate Pending Security Policy Changes
6. Test

SEGMENT-BASED SECURITY GROUPS

A segment-based security group grants access to members of other security groups. It grants access to selected components or **values** (a segment) of the secured item. The security group definition specifies the segment to which it grants access. That is, you use this security group to control access to policies whose secured items include components in the segment.

Note: Before implementing segmented security, it is important to analyze the organization's needs and decide whether segmented security is truly required, as it adds additional maintenance and overhead to the security implementation.

Segmented security is that "third level" of access in Workday. It assumes the user (1) has access to the **item** in Workday, (2) the user will be constrained to organizations or targets **"for whom"** they can see data given the security group that is configured, and then (3) determines which **values** the user will have access to given the configured segments.



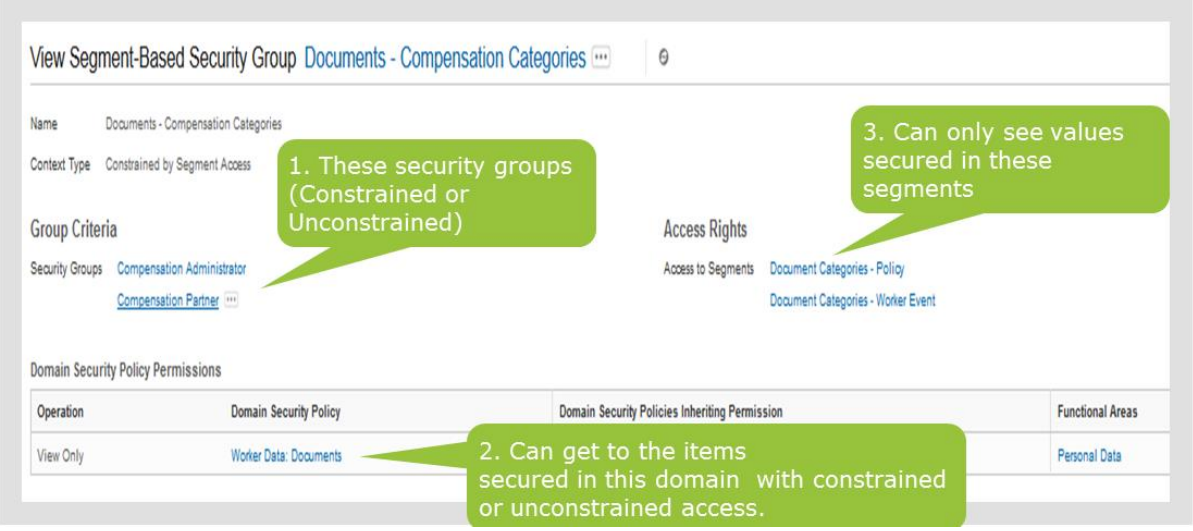
Segmented Areas

- Compensation Setup
- Pay Components
- Business Process Types
- Customers
- Document Categories
- Compensation Plan assignments
- Expense Items
- Integration Systems
- Investors
- Message Queues
- Questionnaires
- Requisition Spend Categories
- Requisition Suppliers
- Supplier Contracts
- Supplier Links

1	**Who can see worker documents**	**Who can see pay components**	**Who can create a requisition**	**Who can create an expense report**
2	For whom can you see worker documents ?	For whom can you see pay components?	For what organization can you create a requisition	For whom can you create an expense report
3	Which document categories	Which pay components	Which spend categories can you see	Which expense items can you see

Segmented security groups allow you to configure which security groups have access to which segments

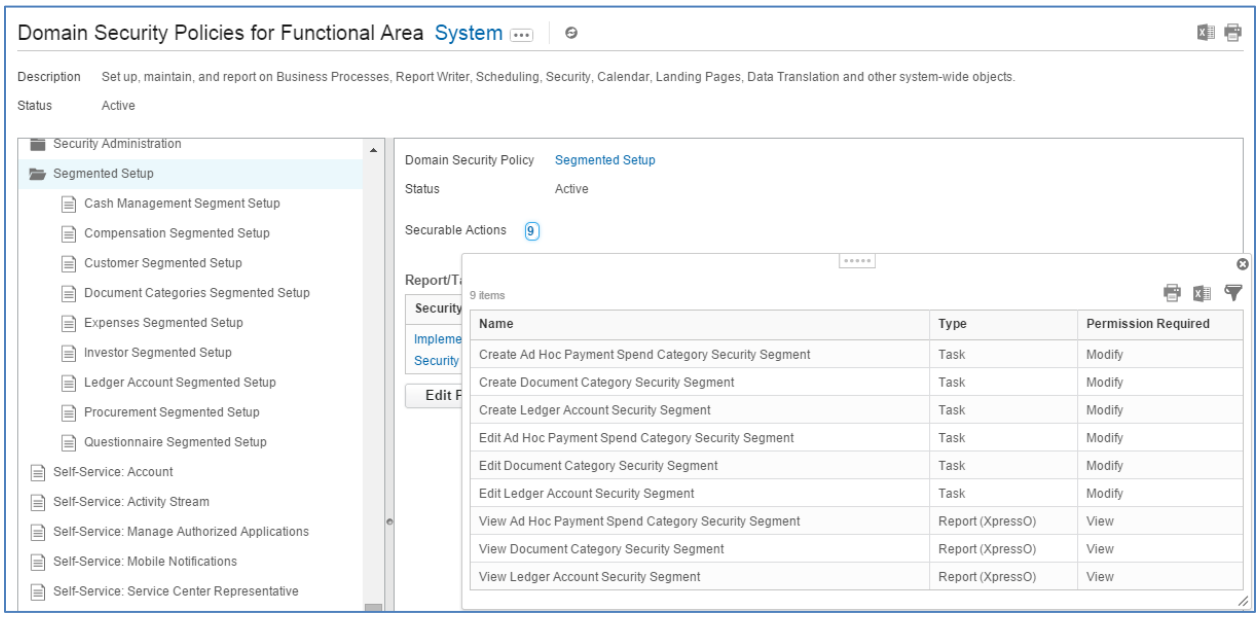
- ✓ Security groups must exist and can be constrained or unconstrained
- ✓ Segments must be defined and maintained.
- ✓ Segment based security groups must then be used in needed domain security policies to enable segmented access



WHAT AREAS OF WORKDAY CAN YOU SEGMENT?

To see what areas of Workday can be segmented, run: **Domain Security Policies for Functional Area** (functional area: **System**)

See the Domain: **Segmented Setup**. See the securable actions in this domain and the subdomains.



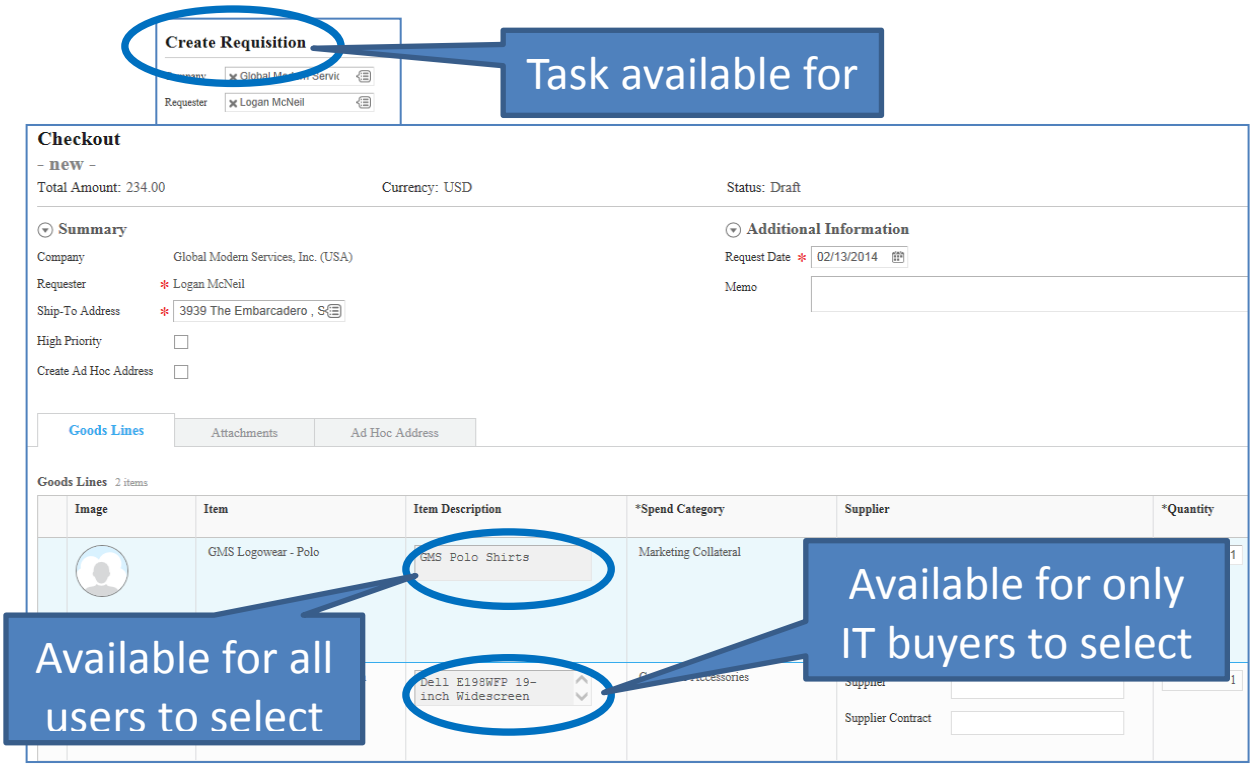
EXAMPLES OF SEGMENTED SECURITY

1. **Pay Component Security Segments** can be defined to control who has access to what components. In the training tenant, you can see this by running the **All Pay Components Security Segments** report. Review the screen captures below to see access provided to Benefits Administrator and Benefits Partners is to the Benefits Pay Component Visibility components (first graphic):

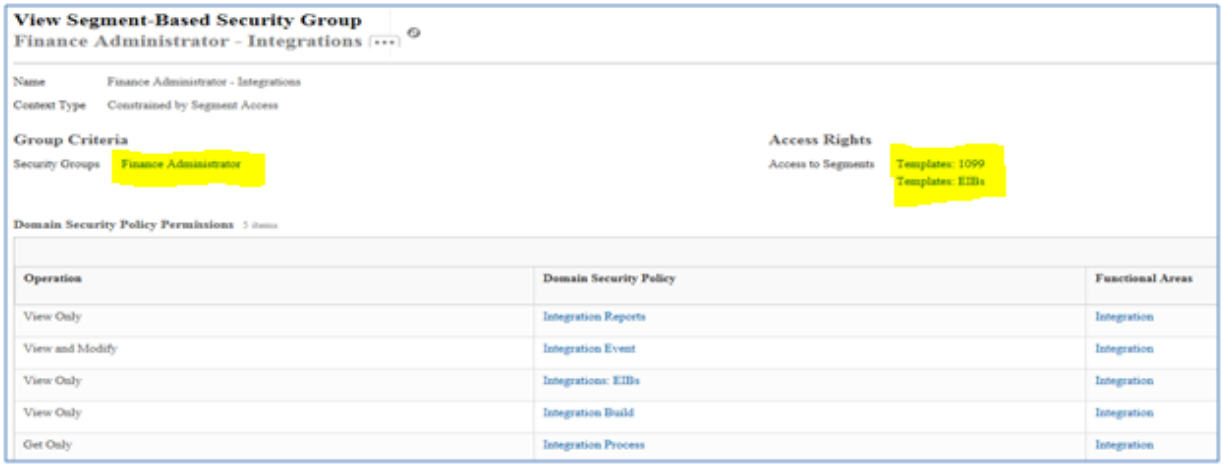
Employee Pay Components visible to Employees as Self (second graphic):

Manager Pay Components visible to Management Chain and Manager security groups (third graphic):

2. **Procurement** - Only IT Department can purchase computer equipment



3. **Integration** - Workday provides Integration System Security Segments to enable you to apply finer control to who can do what with a given integration template, system, or entire category. Shown here only members of Finance Administrator security group has access to the segments indicated.



SEGMENT-BASED SECURITY STEPS

1. Create item security segments
2. Create Segment-based security groups
3. Edit Domain Security Policy to enable members to access restricted segment
4. Activate Pending Security Policy Changes
5. Test

ACTIVITY 9 – CONFIGURE & DEPLOY SEGMENTED SECURITY

It has been determined that Executive Management should have access to the First Class Airfare Expense Item for use in expense reports. Non-executives should not be able to see the item when creating an expense report.

OVERVIEW

Logan McNeil will perform the following actions:

1. Create Expense Item
2. Create Expense Item Security Segments
3. Create Segment-Based Security Groups
4. Edit domain security policy to enable members of the new expense item segment security groups to access expense items
5. Activate Pending Security Policy Changes
6. Test

TASK 1: CREATE EXPENSE ITEM

As Logan McNeil (lmcneil)

1. Search for '*exp item*'
2. Click on the **Create Expense Item** task
3. Enter *'1st Class Airfare'* in the Item Name field
4. Click on the Spend Category prompt and select **Travel & Entertainment**
5. Click the **OK** button to save

TASK 2: CREATE EXPENSE ITEM SECURITY SEGMENTS

1. We can either add our new expense item to an existing expense item security segment or create a new one. We will create a new expense item security segment.
2. Search for *'cr exp sec'*

3. Click the **Create Expense Item Security Segment** task
4. Enter Name of **Restricted Executive Travel Expense Segment**
5. Click the Expense Item prompt  icon and select **By Alphabetical order >1st Class Airfare**
6. Click the **OK** button
7. Click the **Done** button

TASK 3: CREATE SEGMENT-BASED SECURITY GROUP

1. We can either add our new expense item security segment to an existing segmented based security group, or create a new one. We will create a new segmented security group.
2. From the search box, run the task **Create Security Group**
3. Select Type of Tenanted Security Group **Segment-Based Security Group**
4. Enter the Name **Executive Travel**
5. Click **OK**
6. Edit the Segment-Based Security Group as follows:

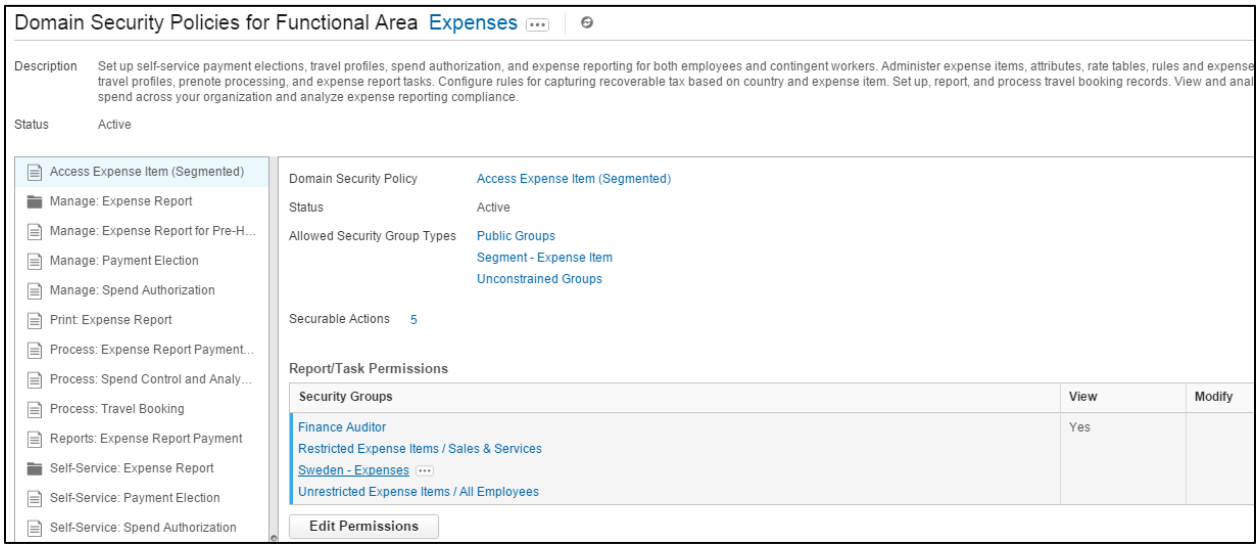
Field Name	***Entry Value***
Security Groups > All Security Groups	Chief Executive Officer Chief Financial Officer Chief Human Resources Officer Chief Information Officer Chief Operating Officer
Access to Segments	Expense Item Security Segment -> Restricted Executive Travel Expense Segment

7. Click the **OK** button
8. Click the **Done** button

TASK 4: EDIT THE DOMAIN SECURITY POLICY DEFINITION

Note: The security group does not need to be added to the Business Process Security Policy for creating an expense report (bp: Expense Report Event) since we already have the needed access to the task. We are restricting what *values* they can see within that task so we must configure access to a domain that allows access to segmented expense items.

1. Search for '*dom sec fun*
2. Click on **Domain Security Policies for Functional Area** report
3. Select the functional area: **Expenses**
4. Click the **OK** button
5. In the left frame, select the domain **Access Expenses Item (Segmented)**
6. In the right frame domain security policy, click the **Edit Permissions** button



7. Under Report/Task Permissions, click the prompt icon in the row with **View** permissions.
8. Include the **Executive Travel** security group (note the unrestricted group)
9. Click the **OK** button to save
10. Click the **Done** button

TASK 5: ACTIVATE PENDING SECURITY POLICY CHANGES

1. Search for '*Activate*'
2. Click the **Activate Pending Security Policy Changes** task
3. Enter '*Activity 9*' into the comments section
4. Click the **OK** button
5. Click the **Confirm** checkbox
6. Click the **OK** button to activate the changes

TASK 6: TEST SECURITY POLICY CHANGES

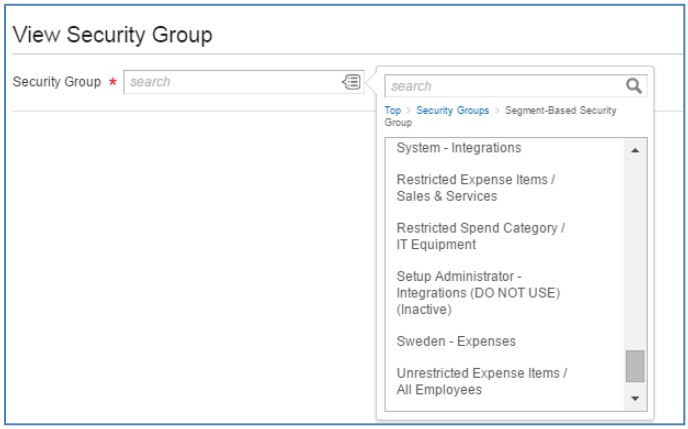
1. As Logan, search for '*cr exp rep*'
2. Click the **Create Expense Report** task
3. Click the **OK** button to Create a New Expense Report
4. Click the **Expense Item** prompt icon
5. Select **By Alphabetical Order** folder
6. Notice the option to select *1st Class Airfare* since Logan is a member of the **Chief Human Resources officer** job-based security group that has access to the segment that secures this expense item.
7. **Cancel**
8. **Start Proxy as Jared Ellis (jellis)**
9. Search for '*cr exp rep*'
10. Click the **Create Expense Report** task
11. Click the **OK** button to create a new expense report.
12. Click the **Expense Item** icon - Select **By Alphabetical Order**
13. Notice there is no option to select 1st Class Airfare since Jared is not a member of Executive Travel security group
14. **Cancel** the expense report
15. **Stop proxy**

TASK 6 - OPTIONAL

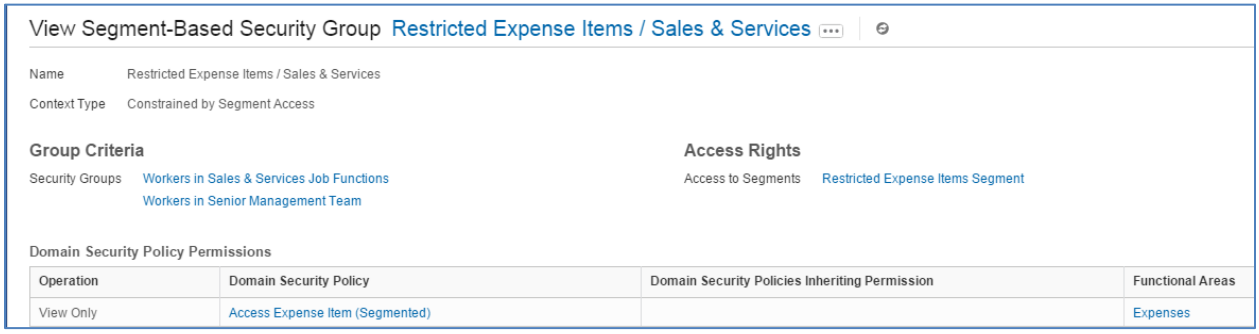
As Logan (be sure to stop proxy if still proxied as Jared)

1. View other expense security segments in tenant: run **View Expense Item Security Segments**

2. View other segmented security groups around expenses in tenant: Run **View Security Group**



3. See how the existing segmented security groups give access to the existing segments. We could have added our new expense item to an existing segment, or added our new segment to an existing security group.

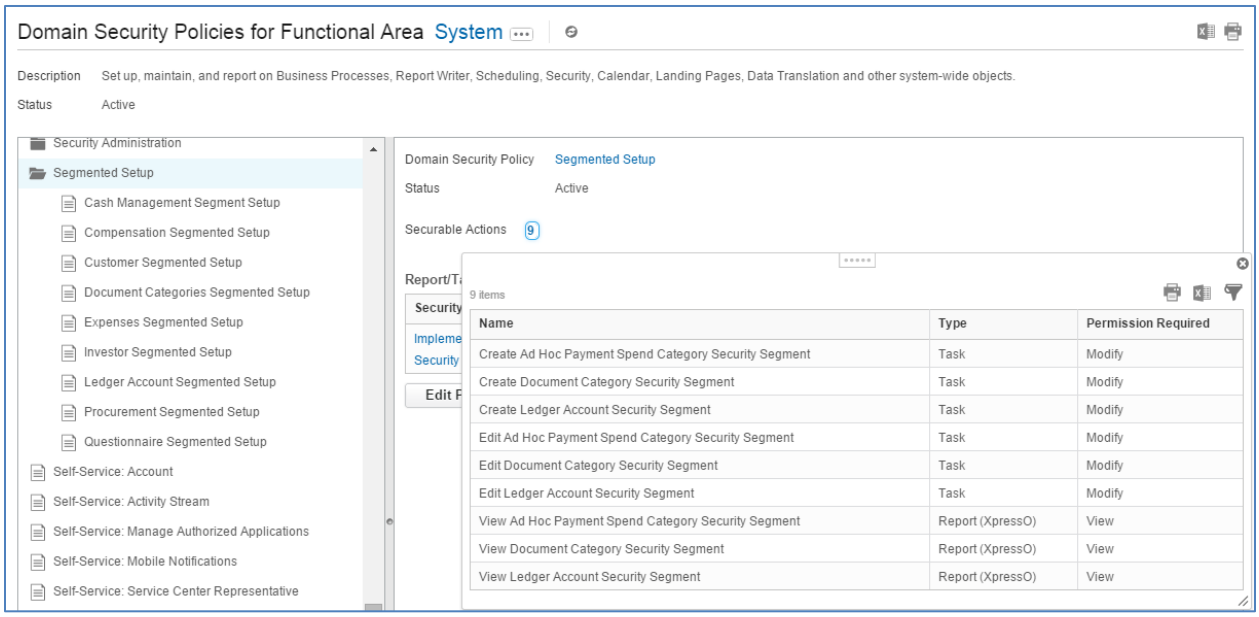


4. View what areas of Workday you can segment.

    a. Run: Domain Security Policies for Functional Area, Area=System

    b. Find **domain: Segmented Setup**

    c. Note the securable actions in this domain and the subdomains.

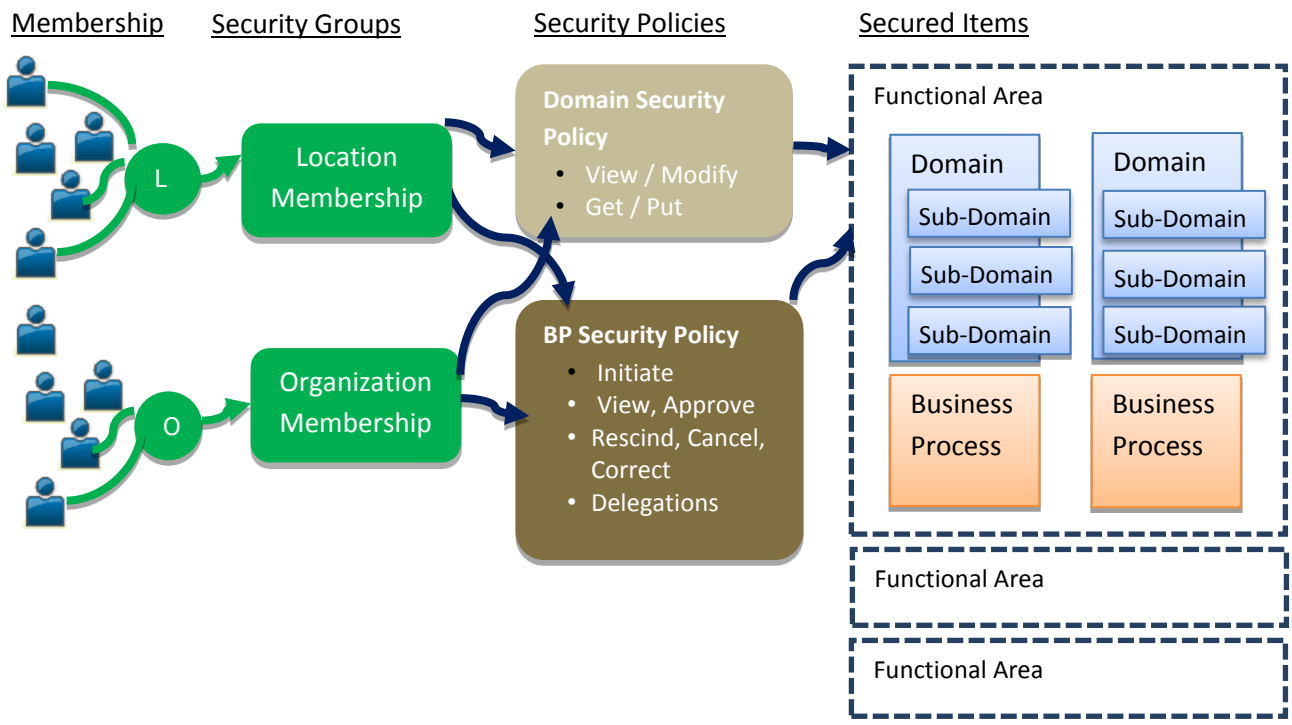


(End of Activity)

LOCATION MEMBERSHIP AND ORGANIZATION MEMBERSHIP GROUPS

There are two types of security groups that are based on membership: Location Membership and Organization Membership. These are similar to job-based security groups in that the membership groups are *automatically* populated based on criteria.

Membership security groups are commonly used in Aggregation and/or Intersection security groups.

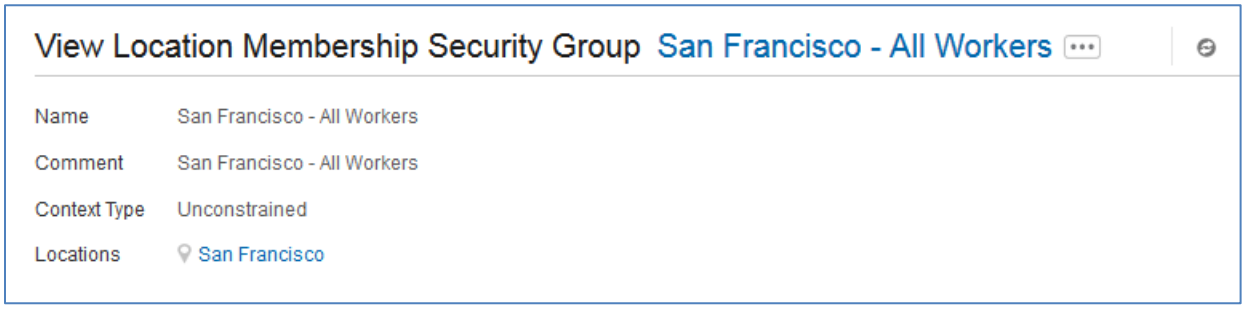


LOCATION MEMBERSHIP SECURITY GROUP

You can define a location-based security group to include one or more Locations. Workers are granted access to items in a policy secured with a location-based security group if they are in any of the Locations included in the group. This is not a context-sensitive security group. Location Based security groups are **unconstrained**. Workday does not attempt to match the workers location to the location of the secured item. Membership in location based security groups is automatically assigned based on a worker's location.

Examples of Location Membership-Based Security Groups:

- Workers in Amsterdam location
- Workers in US locations
- Workers in San Francisco location



ORGANIZATION MEMBERSHIP SECURITY GROUP

You can define an organization-based security group to include one or more organizations of any type (e.g. Company, Cost Center, Location Hierarchy, Pay Group). You can optionally include subordinate organizations. Workers are granted access to items in a policy secured with an organization-based security group if they are in any of the organizations included in the group. This is not a context-sensitive security group. Organization membership security groups are **unconstrained**. Workday does not attempt to match the workers organization to the organization of the secured item. Membership in organization membership security groups is automatically assigned based on a worker's organization assignments.

Examples of Organization Membership-Based Security Groups:

- Workers in Cost Center: IT Services
- Workers in Pay Group: Administrative Weekly
- Workers in Company: Global Modern Services AB (Sweden)

ACTIVITY 10 – CREATE MEMBERSHIP BASED (LOCATION AND ORGANIZATION) SECURITY GROUPS

Only US employees should be able to request time off in Workday. This will be a multi-part activity. First we'll need to create a location membership security group for US Locations. We will also create an organization membership security group to leverage location hierarchies. This is the first of a 2-part activity.

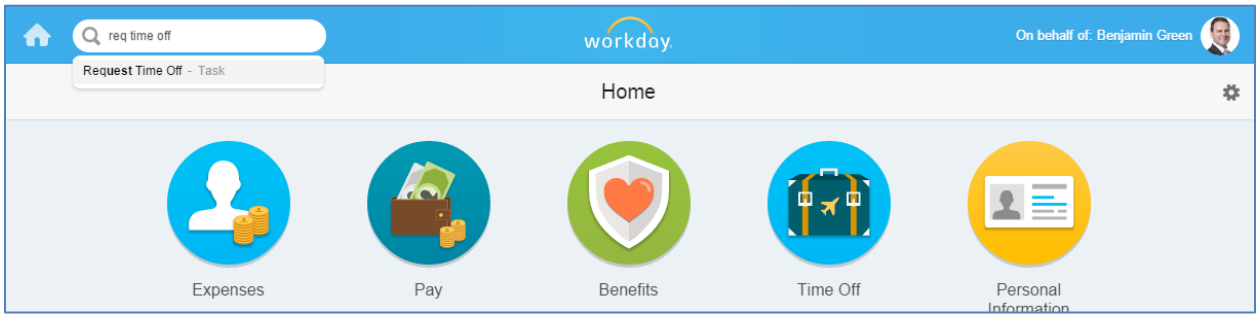
OVERVIEW

Logan McNeil will perform the following actions:

1. View existing security
2. Create Security Group

TASK 1: VERIFY EXISTING SECURITY

1. **Start Proxy as Benjamin Green (bgreen)**
2. Note the **Time off** Worklet on Benjamin's home page and note how from the search box, he has access to the **Request Time Off** task



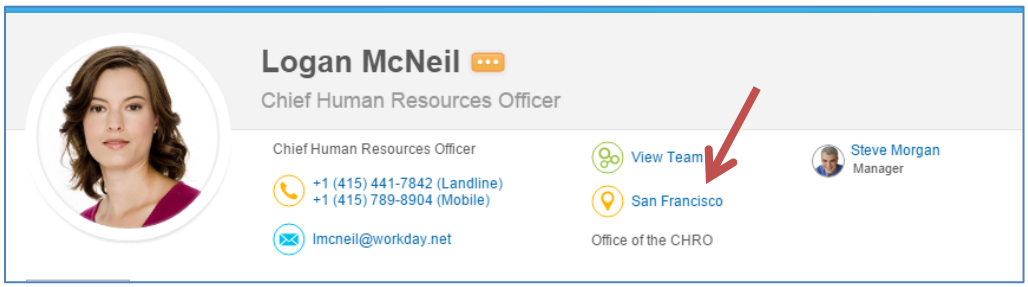
3. Click Benjamin's picture in the upper right, and select **View Profile**
4. Notice that his Location is London, UK.
5. **Stop proxy**

TASK 2: CREATE SECURITY GROUP

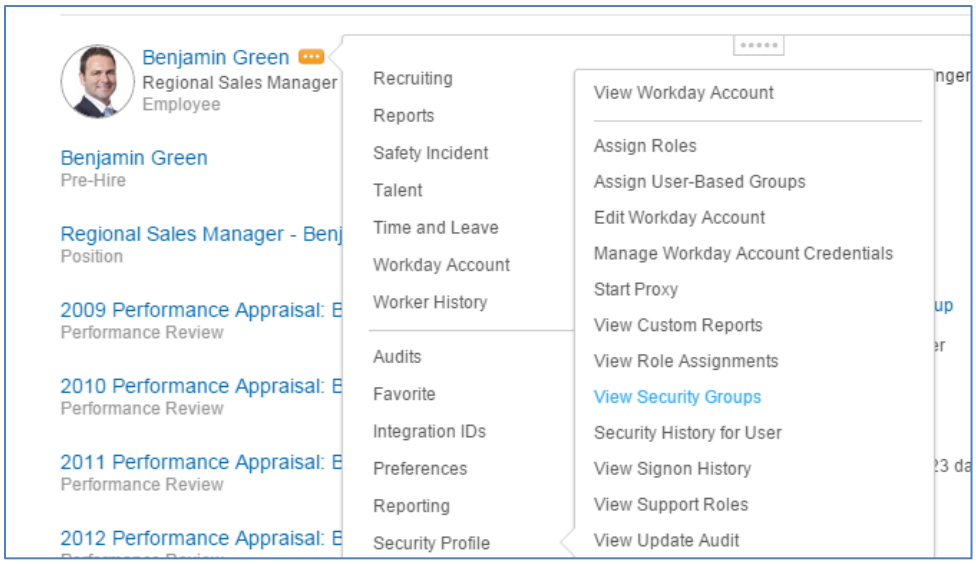
As Logan (lmcneil)

1. Search for *'cr sec gr'*

2. Click the **Create Security Group** task
3. Select **Location Membership Security Group** as the Type of Tenanted Security Group
4. Enter the Name **All US Locations**
5. Click the **OK** button
6. Click on the Locations prompt icon to include the following ***Active Locations***:
   - Atlanta
   - Berwyn
   - Boston
   - Chicago
   - Dallas
   - Las Vegas
   - New York
   - San Francisco
7. Click the **OK** button
8. Click the **Done** button
9. From the search box, run **View Security Groups for User**
10. Choose person: lmcneil / Logan McNeil (Workday Account)
11. Click OK.
12. Notice that Logan is in the All US Locations security group. Why? Because Logan's location is San Francisco.



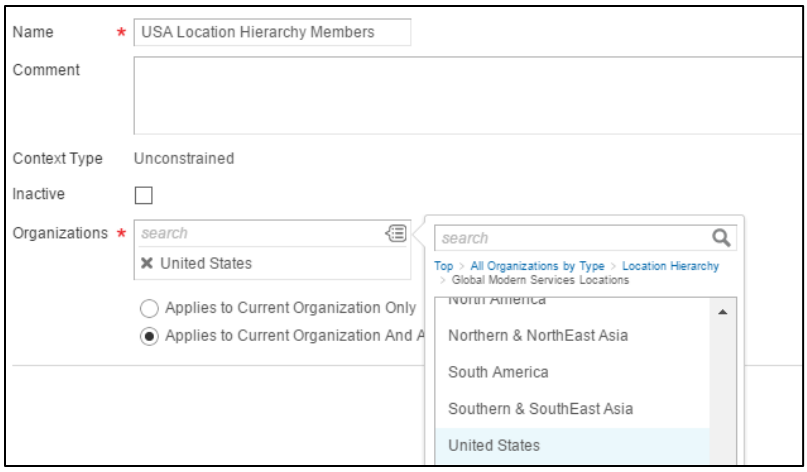
13. Search for *'ben green'*
14. Using the related action for employee Benjamin Green, select **Security Profile** -> **View Security Groups**



15. Notice that he is not a part of the All US Locations security group. Why? Benjamin Green is in London.

TASK 2- CREATE AN ORGANIZATION MEMBERSHIP SECURITY GROUP FOR USA

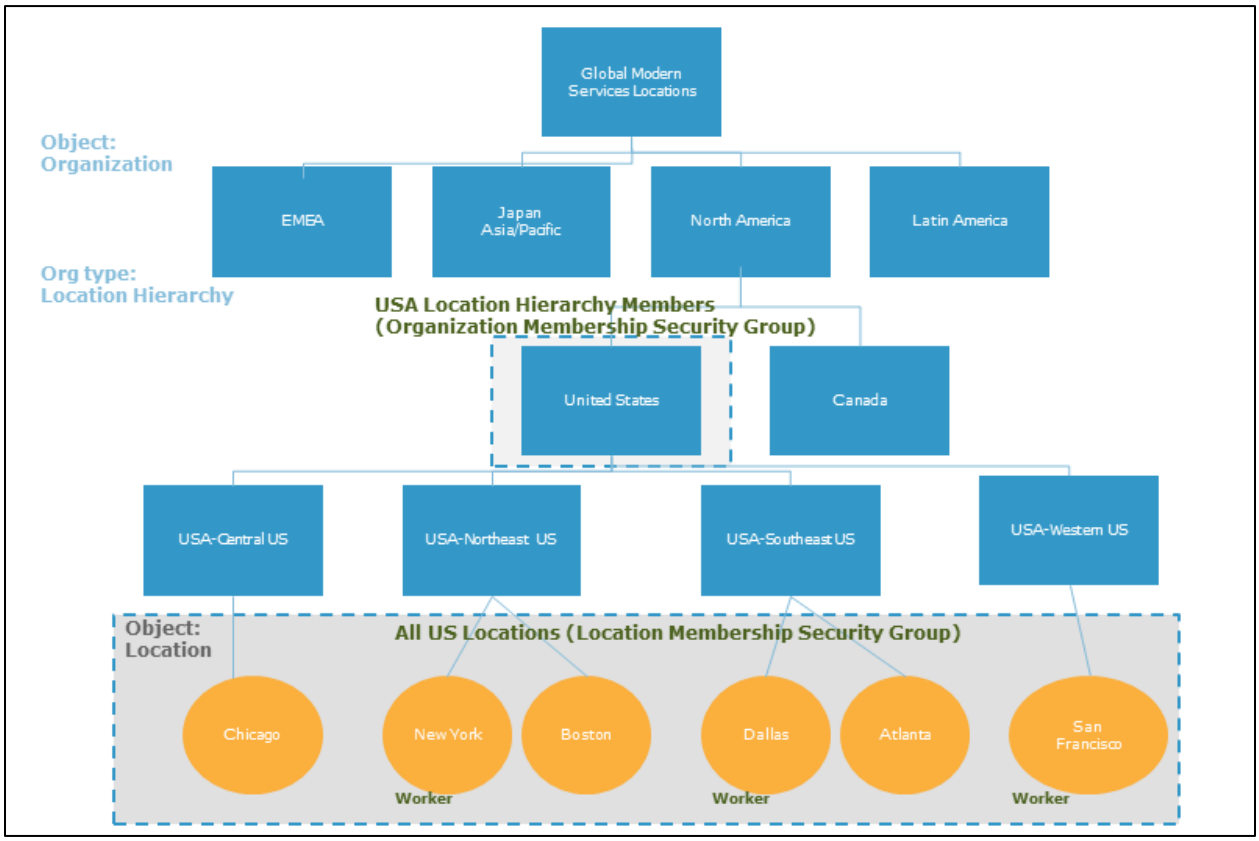
1. From the search box, run the task: **Create Security Group**
2. Select **Organization Membership Security Group** as the Type of Tenanted Security Group
3. Enter the Name **USA Location Hierarchy Members**
4. Click the **OK** button
5. Click on the Organizations prompt icon. Select **All Organizations by Type > Location Hierarchy > Global Modern Services Locations** and select **United States**.
6. Select **Applies to Current Organization and All Subordinates.**



7. Click the **OK** button

8. Click the **Done** button

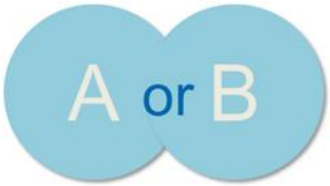
9. Is there a benefit gained using an **Organization Membership** security group based on a Location Hierarchy **vs.** our **Location membership** security group? Organization Membership security groups based on Location Hierarchy are more commonly used and easier to maintain.



(End of Activity)

COMBINATIONS OF SECURITY GROUPS

Workday provides two types of security groups: **Intersection** and **Aggregation**, where you can combine security groups to meet security configuration needs. Combinations of security groups are made up of one or more security groups. You can also filter out, or exclude, one or more security groups from the resulting membership, as well as exclude target instances to support the ability to hide data that a member would have otherwise seen.

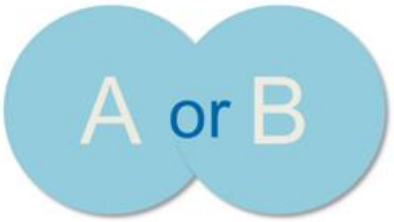


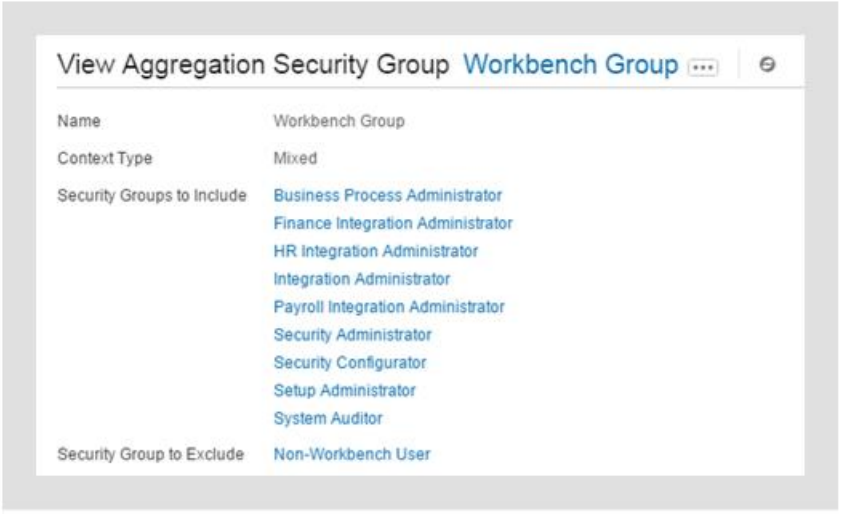
Note: You cannot intersect an intersection security group. You cannot aggregate an aggregation security group. You can however, aggregate an intersection, or intersect an aggregation.

AGGREGATION SECURITY GROUP

To define an aggregation security group, you simply pick which security groups you want to include. The aggregation security group includes users who are in ***ANY*** of the selected security groups. That is, one does not have to be in every included group; being in any one group is sufficient.

- Includes users are those in **any** of the selected security groups ("OR" Statement)
- User does not have to be in every included group
    - Can use exclusion logic
- Very useful to **ease maintenance** when you have several security groups with common access
- Constraint – mixed –depends on what's being aggregated
- **Restriction:** Cannot aggregate other aggregation security groups.
- You can aggregate intersection security groups.





INTERSECTION SECURITY GROUPS

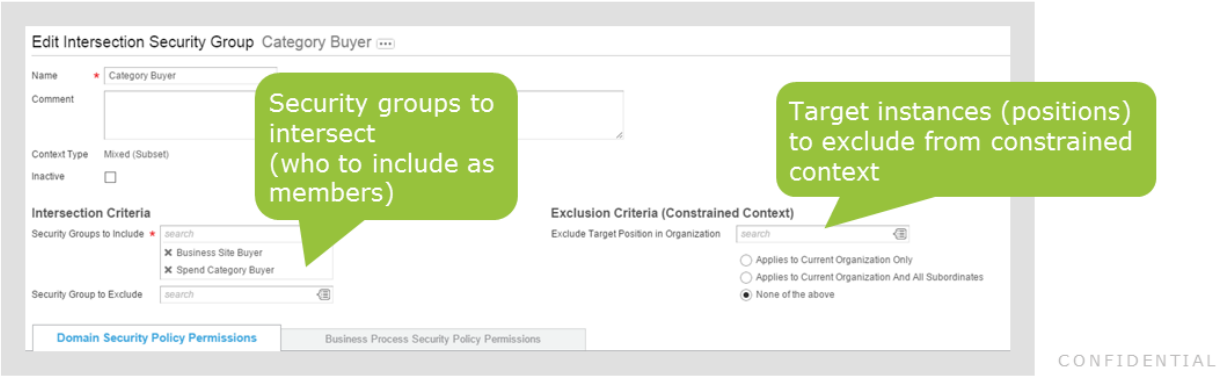
The intersection security group includes only users who meet **all** of the specifications. They must qualify for ***ALL*** of the security groups without exception. Both this group and the aggregation group can use exclusion logic as well. You can intersect two or more security groups.

- Grants access based on membership in ***all*** of the included security groups
- Includes only users who meet all of the specifications . Constraints are also intersected.
- Constraint – Mixed –depends on security groups intersected
- **Restriction – cannot intersect other intersection security groups.**
- You can intersect aggregation security groups

Example: Offer self service PTO to exempt employees in Canada. This configuration uses Employee as Self + Canada Location + Job based (Exempt) security groups. In the diagram below, ***only the small area where all three groups meet will get the security access.***

COMMON USE CASES FOR INTERSECTION SECURITY:

1. **Limiting self service** or certain functionality to only employees in certain regions or locations (vs. All Employees or any Employee-as-self)
2. **Intersecting role-based security groups constrained and enabled for different organization types.** e.g. Constrain access to workers in a given supervisory organization that are also in a given Location hierarchy (e.g. Canadian Workers in Sales Organization)
3. **Hiding populations** – excluding target instances - that you would have otherwise seen (e.g. to meet FERPA regulations, Hide HR from HR, Hide sensitive workers)



COMMON USE CASE #1 – LIMITING SELF SERVICE TO CERTAIN POPULATIONS

For **ESS (Employee-self-service) scenarios where you need to limit the population access** to say, self-service benefits or time off and leave, you can use intersection security groups to only identify certain employees, while still constraining them to their own data (self service).

Examples:

- Only those in the US can do Benefits ESS
- Only those in EMEA can Add Dependents

High Level Steps:

1) Identify the needed population with a security group. Typically this is done using the **Organization Membership** (or Location Membership) if populations are location specific.
2) **Create an intersection security group** that intersects the organization membership security group with the **employee-as-self** security group.
3) **Replace all needed domain and business process security policies** with the intersection security group instead of employee-as-self (remove employee-as-self).
4) **Activate & Test! Test! Test!**

Important: If using intersection security groups, be sure to add the intersection security group in needed domain or business process security policies, and remove references to the security groups that are being used in the intersection.

ACTIVITY 11A – CREATE AN INTERSECTION SECURITY GROUP

In the last activity, we created a Location Membership Security Group called All US Locations. Next, we will use that group to create an Intersection Security Group and update the Request Time Off business process to ensure only US based employees can request time off in Workday. All international employees will submit time off requests outside of Workday.

OVERVIEW

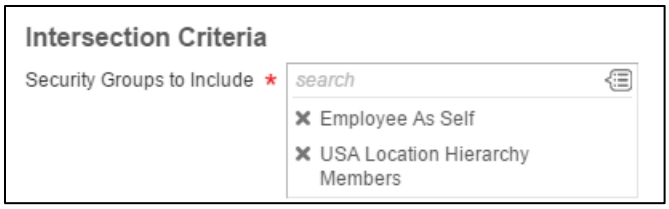
Logan McNeil will perform the following actions:

1. Create Security Group
2. Edit Domain and Business Process Security Policies
3. Activate security changes
4. Test

TASK 1: CREATE THE INTERSECTION SECURITY GROUP

As Logan McNeil (lmcneil)

1. Search for *'cr sec gr'*
2. Click the **Create Security Group** task
3. Select **Intersection Security Group** as the Type of Tenanted Security Group
4. Enter the Name *US Employee-as-self*
5. Click the **OK** button
6. Click on the prompt icon to define the following as **Security Groups to Include**
   - **USA Location Hierarchy Members** *(you can use your location or organization membership security group from the last activity. Common practice is to use organization membership.)*
   - **Employee as Self**



7. Click the **OK** button

8. Click the **Done** button

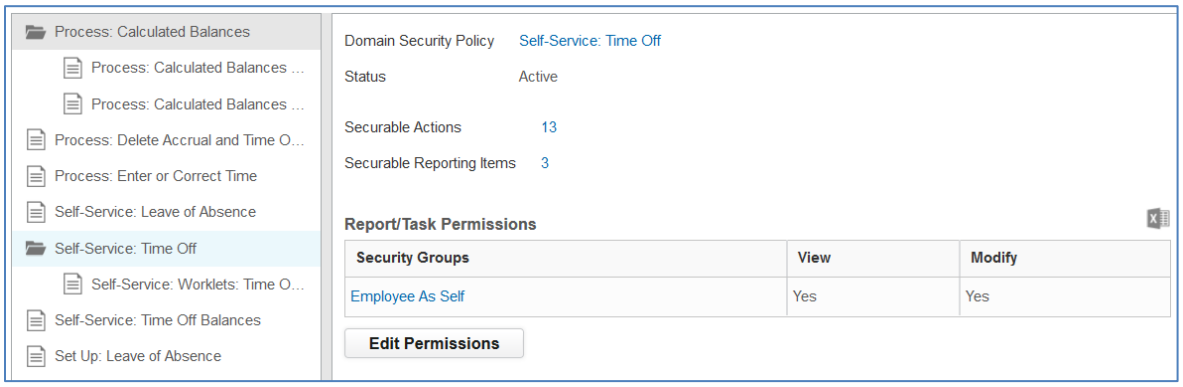
TASK 2 - NOW, LET'S IDENTIFY ALL THE **NEEDED SECURITY POLICIES TO EDIT** WITH THIS NEW INTERSECTION SECURITY GROUP INSTEAD OF EMPLOYEE-AS-SELF.

1. From the search box, run: **Domain Security Policies for Functional Area**

    a. Functional Area: **Time off and leave**

    b. Click OK

2. In the left frame, find the Domain: Self Service Time off



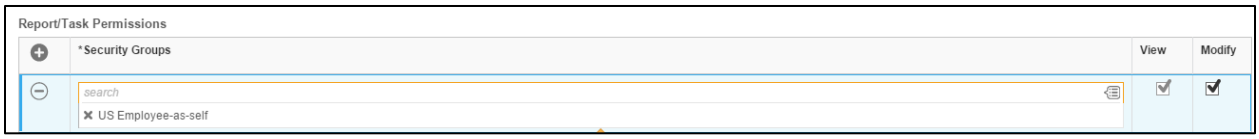
3. See how the current access is for employee-as-self.

4. Click on **Edit permissions**

    a. **Remove** the employee-as-self security group

    b. **Add** your intersection security group: US Employee-As-Self

    c. **When adding your intersection security group, it is very important to remove the security group that is included in your intersection security group.**



5. Click **OK** to save and **Done**.

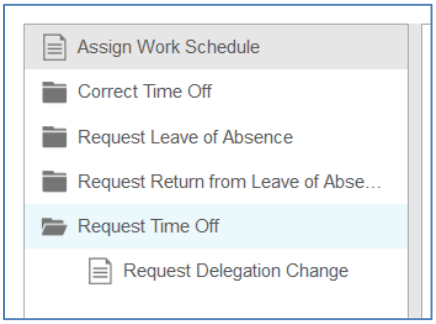
6. Now let's check business process security policies for Time off and Leave

7. From the search box, run: *Business Process Security Policies for Functional Area*

8. Select functional area: Time off and leave

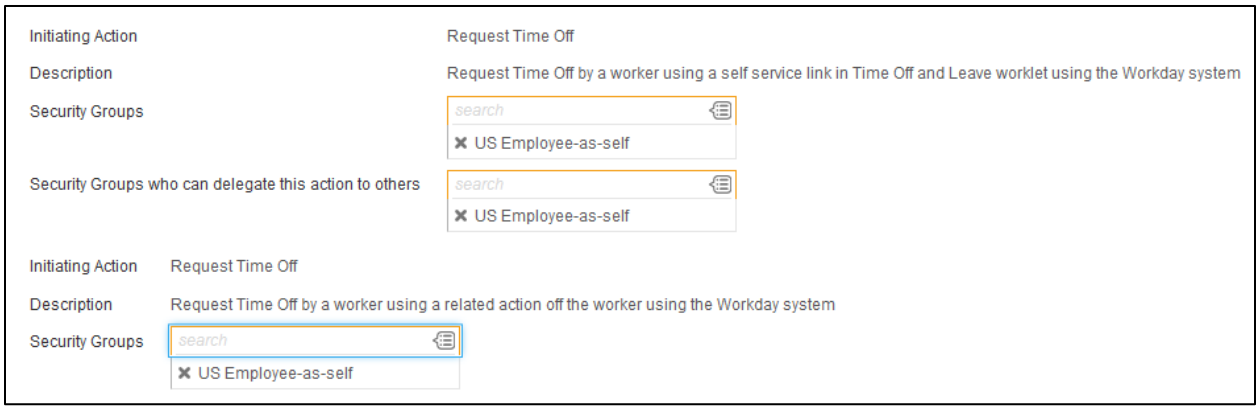
9. Click OK

10. In the left frame, note the business process types we should consider for our limited self-service access. For purposes of this activity, we will only configure the 'Request time off' business process with our intersection security group, recognizing the other business process types that would also need to be modified in an implementation. Select **Request Time off** in the left frame.



11. Scroll to the bottom of the security policy on the right and click on **Edit Permissions**

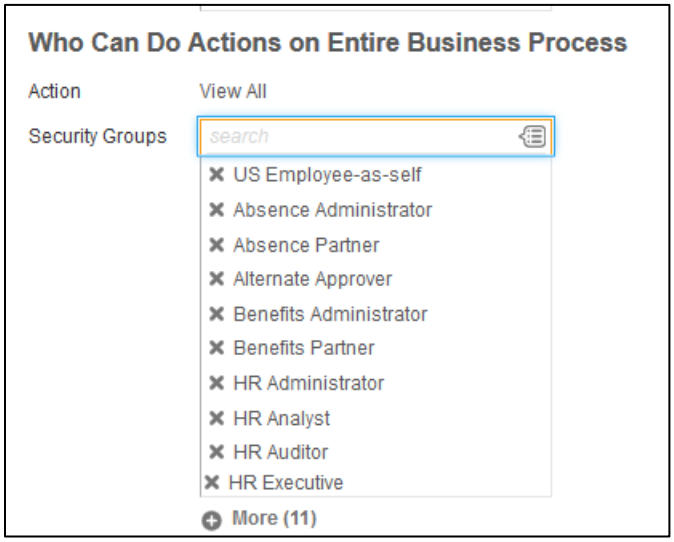
12. Under the *Who can start this business process* section, find the places where **employee-as-self** has access to initiate and replace with your intersection security group: **US Employee-As-Self** (There should be 3 replacements made.)



13. Scroll down in the security policy, to the *Who can do actions on entire business process* and under the *View All action*,

    a. Remove the **employee-as-self**, security group

    b. Replace with **US Employee As Self**



14. Click **OK** to save the change and **Done**.

15. Now we have edited one self-service domain and one business process security policies. Now let's activate the security changes and test.

TASK 3– ACTIVATE AND TEST

1. From the search box, run **Activate Pending Security Policy Changes**

2. Enter a comment, such as: *"Activity 11A"*

3. Click OK to save

4. Confirm the domain and business process security policies with edits to be activated

5. Click **OK.**

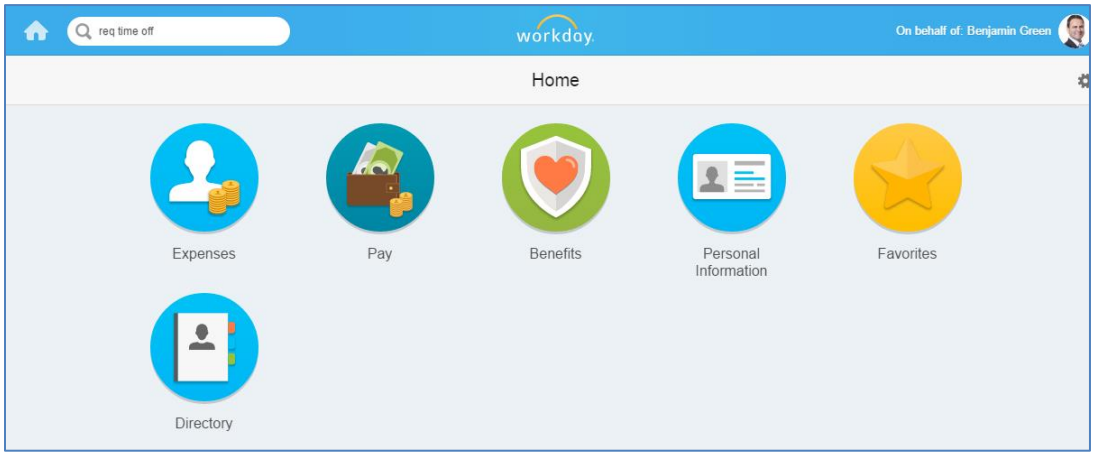
6. **Start proxy** as Benjamin Green

    a. Remember that Benjamin is in the UK, not in the USA.

    b. See how Benjamin no longer has the **Time off** Worklet on his home page.

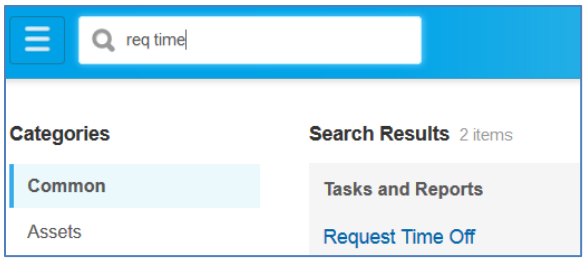
    c. From the search box ,try running the task: **Request time off**

    d. See how Benjamin no longer has access to this task.



7. **Stop Proxy**

8. As Logan, see how Logan still has access to the task: Request time off and she also has the Time off Worklet on her home page.



CONCLUSION

- Intersection security groups can be useful in limiting self-service functionality, by intersecting a security group that identifies the population (typically an organization membership security group type), with the employee-as-self security group.

- Use the *Domain Security Policies for Functional Area* and the *Business Process Security Policies for Functional Area* to assess the needed security policy implications and replacements when using intersection security.

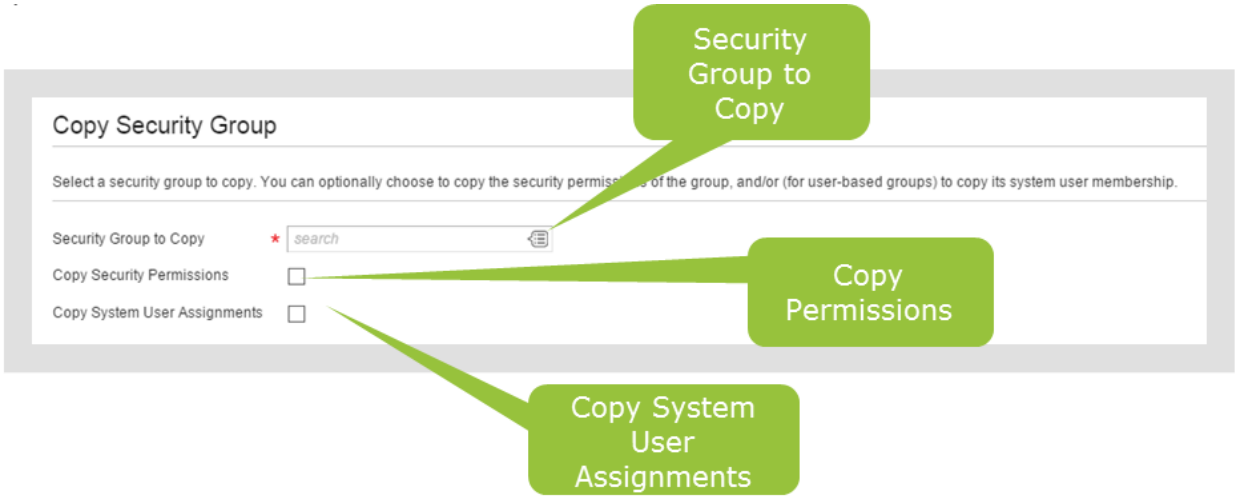
- Be sure to remove the employee-as-self security group and replace with the intersection security group to configure the needed intersecting access.

(End of Activity)

COPY SECURITY GROUPS

In addition to creating, deleting, and editing security groups, you can also copy existing security groups to simplify security maintenance.

Use the **Copy Security Group** task to select the existing group to copy. You can optionally copy security permissions to add new security group to all domain security policies and business process security policies where the existing group is used. The addition of the new group to all the security policies that specified the copied group becomes a pending security change. The new group is copied to the policies where the copied group appears regardless of whether the copied group's association with a policy is currently active or itself a pending change. Another option includes the ability to copy users of the existing group for User-Based Security groups.



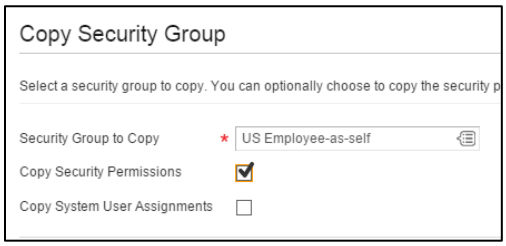
ACTIVITY 11B – OPTIONAL - CONFIGURE INTERSECTION WITH EXCLUSION IN MEMBERSHIP

Next, copy the Only US Employees Intersection Security Group to create a new security group that excludes US employees in San Francisco as members. All San Francisco employees will need to submit time off requests outside of Workday as well as international employees.

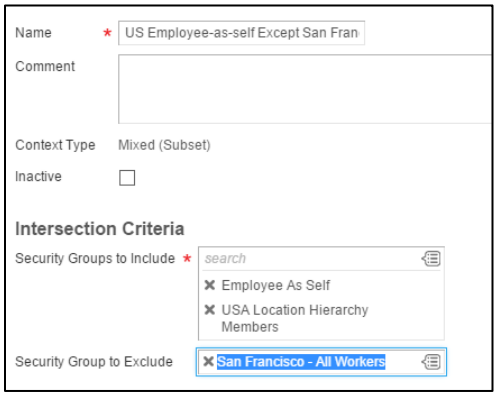
TASK 1: COPY SECURITY GROUP

As Logan McNeil (lmcneil)

1. Search for 'copy sec gr'
2. Click the **Copy Security Group** task
3. Select **Intersection Security Group > US Employee-as-self** as the Security Group to copy
4. Check the box to **Copy Security Permissions**



5. Click OK.
6. Change the Name to **US Employee-as-self Except San Francisco**
7. Click on the icon Security Groups to Exclude and select **All Security Groups > San Francisco – All Workers**



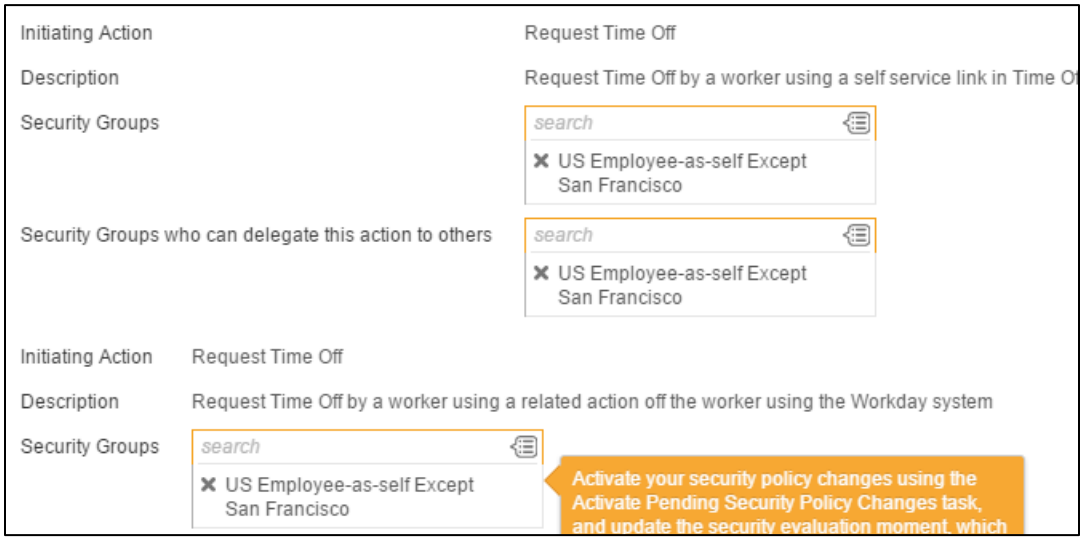
8. Click **OK**, then click **Done**

TASK 2: EDIT THE BUSINESS PROCESS SECURITY POLICY

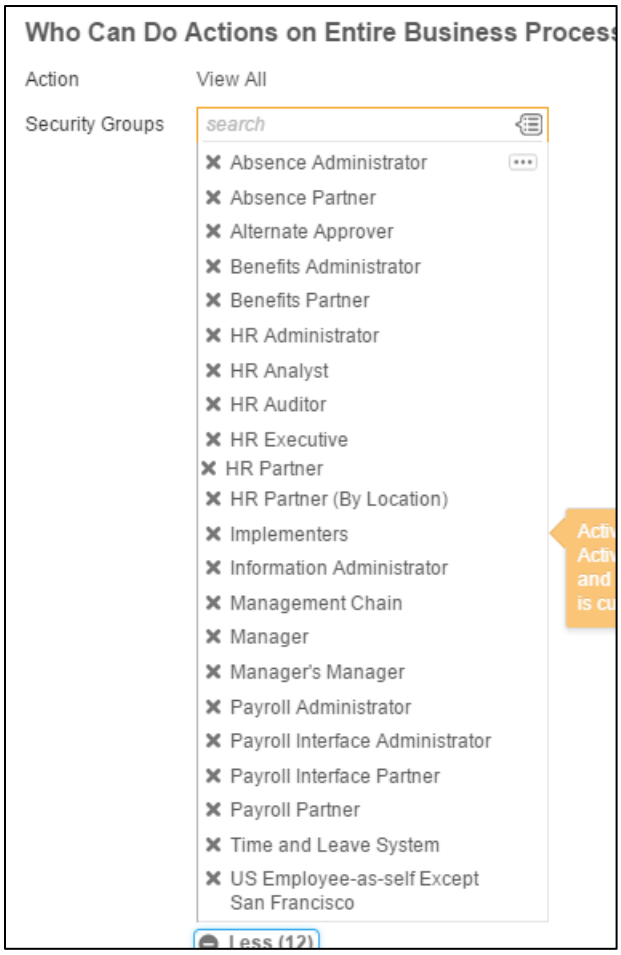
1. Search for 'bp: time off'

2. Click on the related action icon for **Request Time Off**, select **Business Process Policy** -> **Edit**

3. Locate the *Who Can Start the Business Process* section. In the Request Time Off sections, click on the ✕ to remove the **US Employee-as-self** security group**.** Notice the **US Employee-as-self Except San Francisco** security group you just created is there. Why?



4. Still editing the bp security policy, scroll down to the *Who can take actions on entire business process* "View All" section. Remove the US Employee-as-self and leave your copied security group permissions.

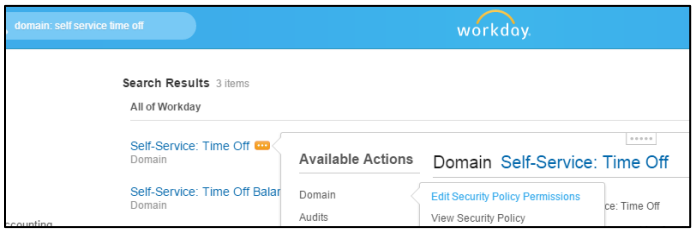


5. Click the **OK** button

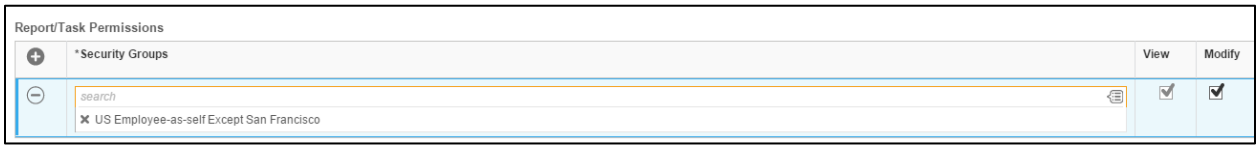
6. Click the **Done** button

7. From the search box enter **domain: self service time off**

8. Using related actions, select **Domain > Edit Security Policy Permissions**



9. Remove the US Employee-as-self security group and leave your copy.



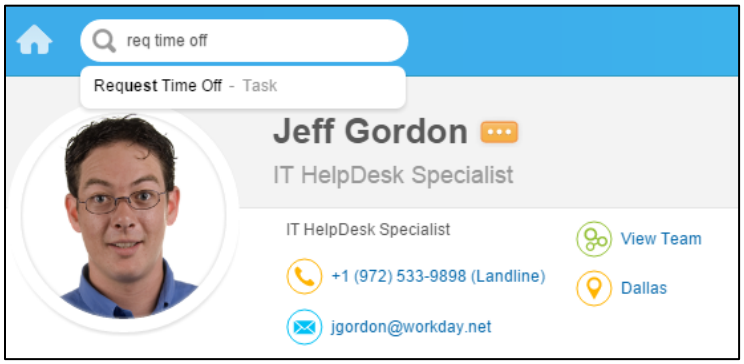
10. Click OK and Done.

TASK 3: ACTIVATE THE SECURITY CHANGES

1. Search for *'activate'*
2. Click on the **Activate Pending Security Policy Changes** task
3. Enter the comment *Activity 11B*
4. Click the **OK** button
5. Click the **Confirm** checkbox
6. Click **OK**

TASK 4: TEST THE SECURITY CHANGES

1. Search for *'req time'* - notice that Logan can no longer request time off from the search box.
2. **Start Proxy as Jeff Gordon (jgordon)**
3. Click the Time Off icon on his Home page
4. Notice that Jeff does have access to the Request Time Off task.
5. Why? Take a look at Jeff Gordon's worker profile. (Click on his picture in the upper right and then click **View Profile**.) He is located in Dallas. We only excluded employees from the San Francisco location.



6. **Stop proxy**

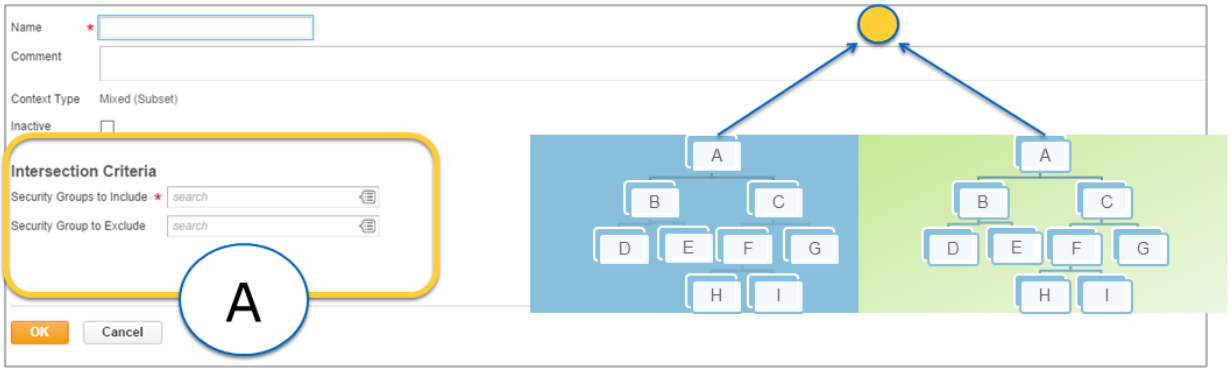
(End of Activity)

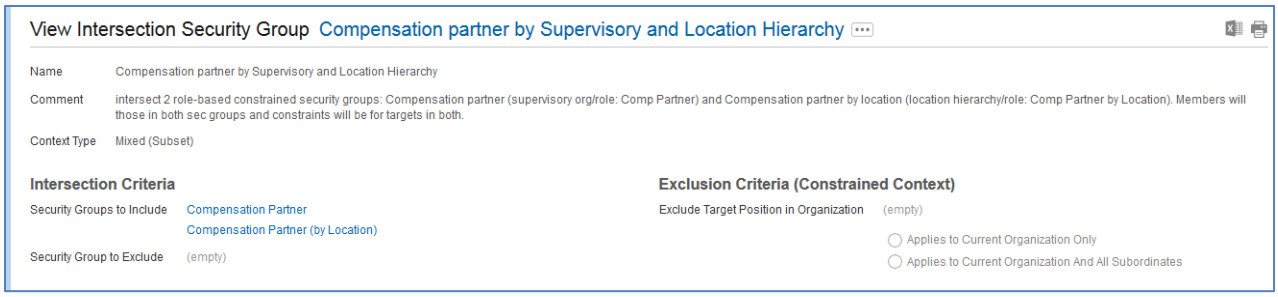
COMMON USE CASE #2 - INTERSECTING ROLE-BASED CONSTRAINTS

Intersection security groups can also be useful when you need to 'intersect' role-based constraints for roles enabled for different organization types.

For example, you can assign a **Compensation Partner** role to a supervisory organization, say, Sales, and then assign a **Compensation Partner (by location)** role to a location hierarchy, say, North America. You can then intersect these 2 role-based constrained security groups, where the resulting constraint will be: *Workers in the Sales supervisory organization that are also in North America.*

A – include security groups to intersect and determine members and constraints





High Level Steps:

1) Roles must exist, for example: **Compensation Partner** enabled for Supervisory and **Compensation Partner by Location** enabled for Location Hierarchy

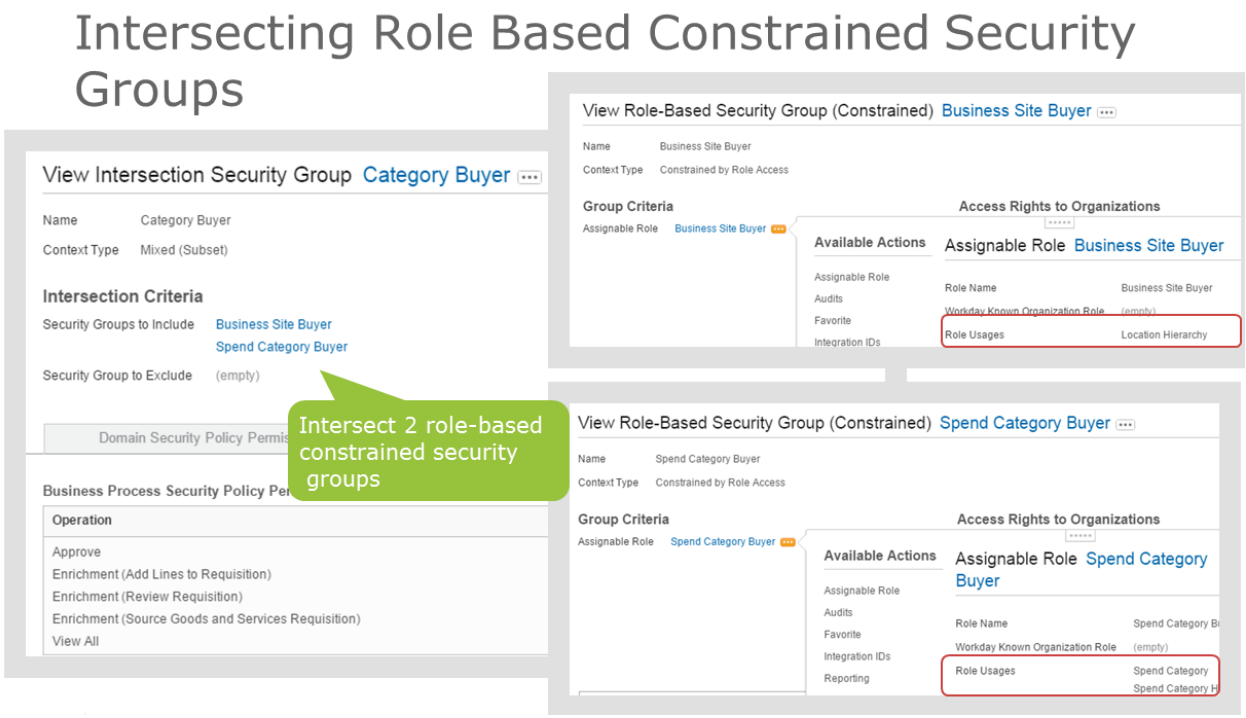
2) Roles must be assigned. Assign the same position to both roles.

3) Create role-based constrained security groups for each role.

4) Create intersection security group that intersects both role-based constrained security groups

5) Configure needed domains or business process security policies with the intersection security group. Remove references to the role-based constrained security groups if in those policies.

Another example. Here we are intersecting 2 role-based constrained sec groups: **Business Site Buyer** and **Spend category buyer**. Our intersection security group will identify: Those assigned to both roles: Business Site Buyer and Spend Category Buyer and will constrain them to the "Location Hierarchy" AND Spend Category/Spend Category Hierarchies that they are assigned to in those roles.



See Workshop 3 in back of guide for an example of intersecting role-based constrained security groups.

INTERSECTION SECURITY GROUP LIMITATIONS

Though powerful and commonly used, it is important to be aware of limitations around intersection security groups.

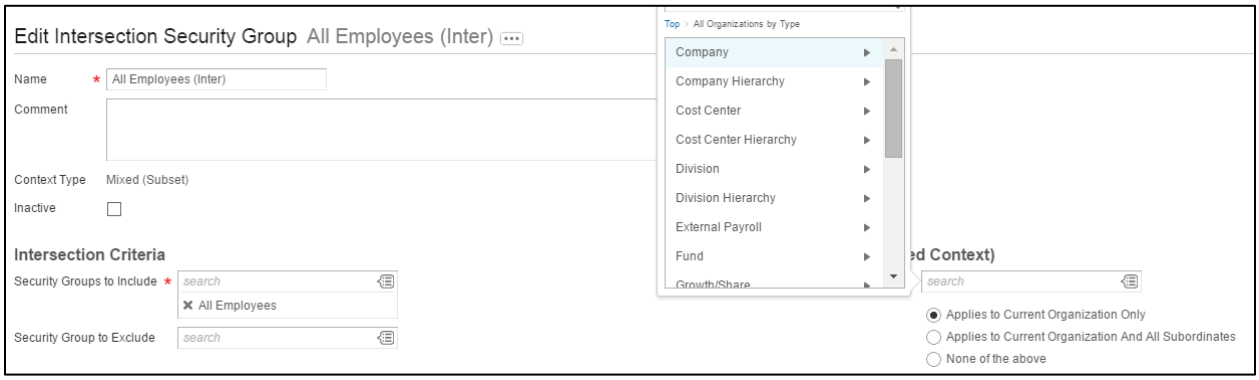
- Intersection security groups cannot be used to intersect other intersections
- Certain **Workday-delivered reports with organization filters** may not work if user has intersection security access to report.
- Not all functionality can handle intersections
    - **Compensation**
    - **Talent**
- Intersection security does not work well for **merit processing or year-end performance calibration**

- Restrictions **around intersection security groups with multiple contextual groups**.
    - Workday can disallow Intersection security groups that intersect two or more constrained security groups from being applied to
        - Initiating actions on business processes
        - Processing actions on business processes
        - Security domains
    - This can prevent you from applying security groups to policies for secured content that must run with a single contextual filter
    - Example: If you create a security group that intersects a security group of HR partners for supervisory organizations and a security group for HR partners in Spain (location hierarchy), and Workday has disallowed the Intersection Groups Containing Multiple Contextual Groups security group type on a business process or security domain policy, you can't add the intersection security group to the policy.

- *As with any security configuration, be sure to test extensively to confirm that intersection security configuration meets your needs.*

COMMON USE CASE #3 – HIDING TARGETS

Intersection security groups can also be used to exclude target instances from members' otherwise access. Exclusion criteria can be configured by referencing organizations. Those you want to exclude must be identified via organizations and the **exclusion applies to positions in those organizations** (not workers), so be sure to account for all positions a worker may have.



Common Scenarios:

- To meet FERPA regulations at educational institutions. Per FERPA, students working at the education institution may opt out (or opt in) of having their information be public. Access to public worker information in Workday must make the exception to not show these students.
- Hiding sensitive workers, e.g. political dissidents, undercover agents at a police agency, or famous people you do not want to show in public worker directories.
- Hiding HR from HR. There are cases where an HR Partner, that say, supports a given organization, should not have target access to a worker's position in that organization if that worker is their HR peer.

Using Intersection Security groups with target exclusion, we can configure these exceptions to "hide" or exclude certain positions from the members' otherwise access.

High Level Steps

1. Identify the "hidden" worker positions by organization. Create a custom organization if needed and place the "hidden" worker positions in that custom organization.
   - For FERPA, place students in a custom organization
   - For sensitive worker positions, identify these positions via an organization or create a custom organization if needed with membership rules if possible.
   - For Hiding HR from HR, identify your HR worker positions via an organization, create a custom organization if needed with membership rules if possible.
2. Create an intersection security group that excludes access to the hidden population using the organization(s) defined.

3. **Replace security groups on needed domains**. In the example below, the "All Employees" security group was removed from the Worker Data: Public Worker Reports domain and replaced with the intersection security group that has the configured target exclusion to hide certain positions from public access.

- Use caution when excluding as the **exclusion applies to the position, not to the worker** – thus all the workers' positions must be included in the exclusion criteria to 'hide that worker'.

- Intersection security groups with exclusions should not be used in business process routings.

ACTIVITY 11C – OPTIONAL CHALLENGE ACTIVITY

Configure an intersection security group to restrict access to worker profiles. This challenge will provide hints, but not step by step instructions.

GOAL: Workers should not be able to view profiles of workers who are located in Northern Europe.

Before you start your security configuration, verify the default configuration allows workers to search for and view any worker profile.

As a test, proxy as Adam Carlton (acarlton) and search for Alejandro Ruiz. Adam is an employee in Boston and Alejandro is located in London. When you have completed the configuration, Adam should no longer be able to see Alejandro's profile.

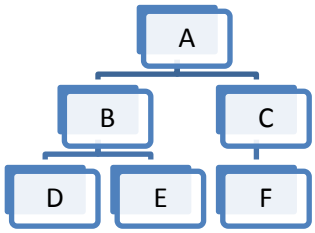
HINTS:

- Create an intersection security group called **All Employees (Inter)**
- Use the location hierarchy **EU - Northern Europe** for the *Exclude Target Object in Organization apply to Current Organization and All Subordinates (COAS)*
- Domain: Worker Data Public Reports is the domain you want to restrict access to
- Activate and Test

LEVEL-BASED SECURITY GROUPS

Workday enables you to create a security group based on a **leveling mechanism**, where you can:

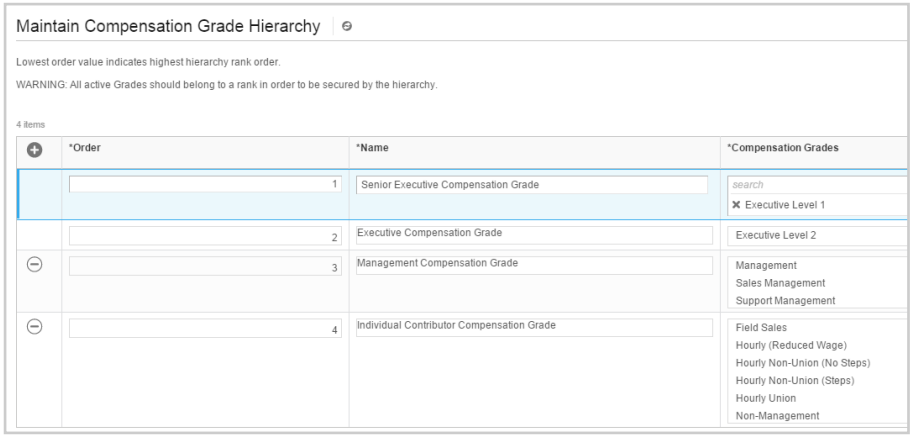
- **Identify members based on level**
- **Constrain member target access to lower levels, across organizations.** Target access is only to workers in lower levels, **not same level, nor higher levels. No organization constraint.**



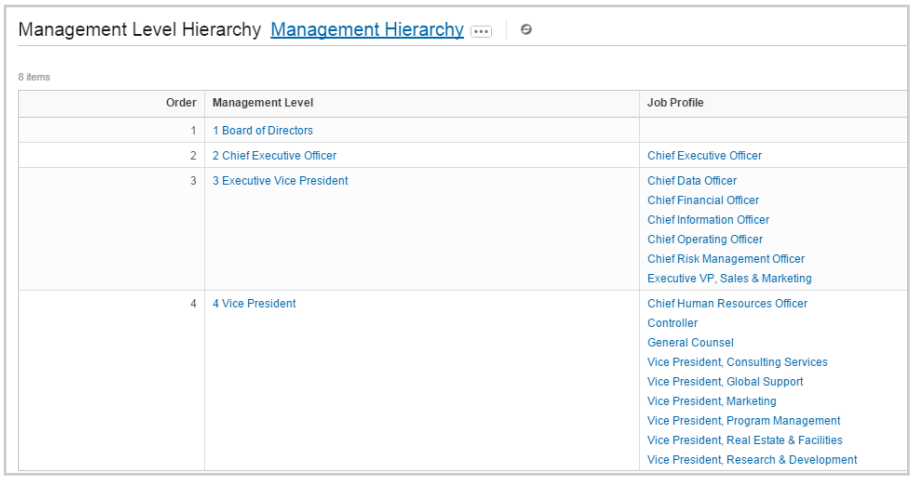
Level based security groups are primarily used and needed for **Talent Management**.

In order to use level-based security groups and identify and constrain workers based on levels, you must **define and maintain a leveling mechanism or hierarchy in the tenant**. Leveling mechanisms supported include:

Compensation Grade Hierarchy



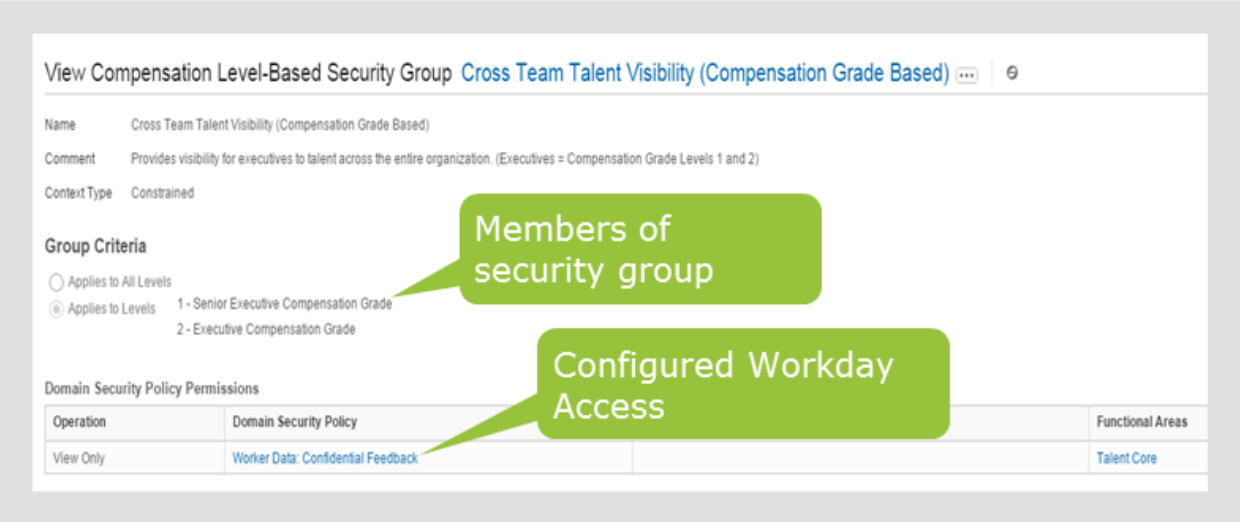
Management Level Hierarchy



Example:
Level based security groups allow users to access talent related data for workers across organizations, but only limited to those in lower levels, not same, nor above.

In the example below,

- We are identifying those in Compensation Grades 1 and 2 as members.
- We are then configuring this level based security group in the domain: Worker Data Confidential Feedback.
- Members, i.e., those in Compensation Grades 1 and 2, can access Worker Data Confidential feedback items in Workday, but *only for those in lower compensation grades than themselves*.
    - Those in Level 1 – Senior Executive Compensation Grade can only access target data for those in Levels 2,3 and 4 (not others in Level 1).
    - Those in Level 2 – Executive Compensation Grade can only access target data for those in Levels 3 and 4 (not for those in Levels 1 or 2).

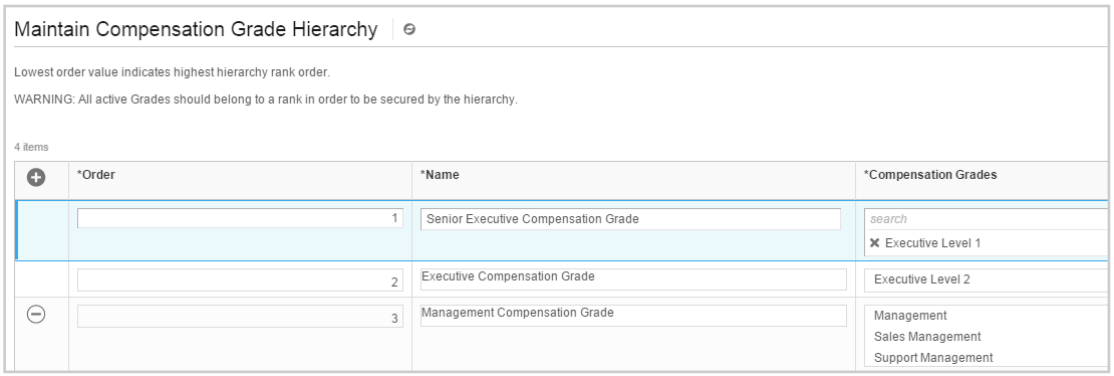


CREATE AND MAINTAIN LEVELING HIERARCHIES

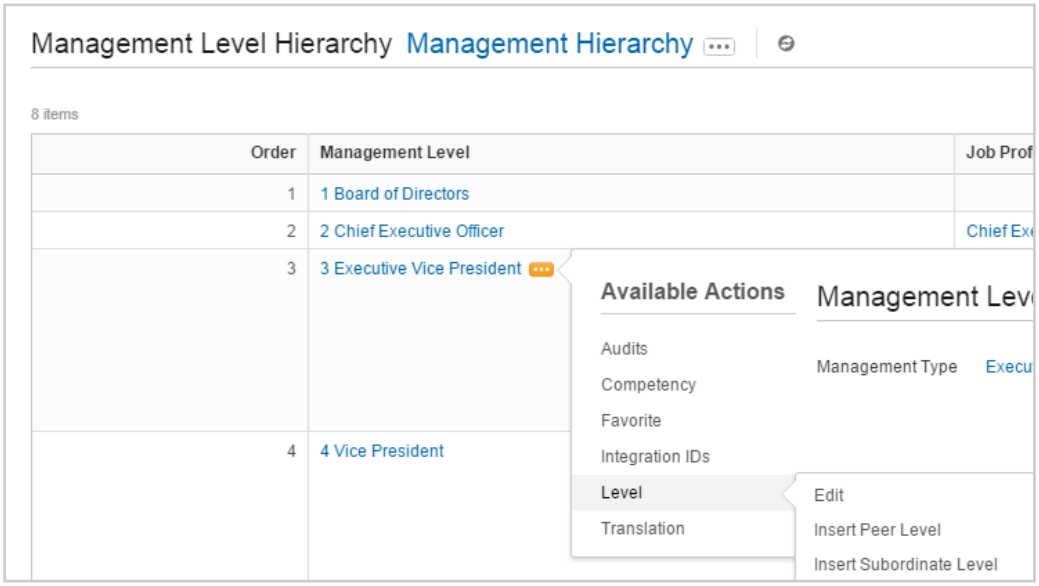
The **Maintain Compensation Grade Hierarchy** task enables you to set up a compensation grade hierarchy. You can only create one compensation grade hierarchy per tenant.

Lower order numbers indicate higher levels. So, for example:

- Those in Level 1 can access data for those in Levels 2,3,4.
- Those in Level 2 can access data for those in Levels 3,4
- Those in Level 3, can access data for those in Level 4.
- Those in Level 4, cannot access data for anyone since no lower levels defined in hierarchy.

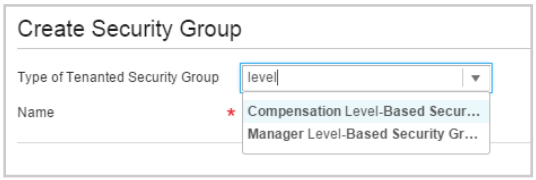


Management levels are created using the **Management Level Hierarchy** task. The **Maintain Management Types** task is used to define the individual management types required to build a management level hierarchy.

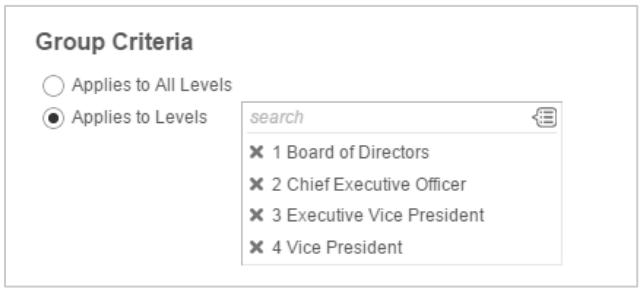


CREATING A LEVEL BASED SECURITY GROUP

Once you have created the hierarchy and leveling mechanism with the defined orders, you can **create a Level-Based security group** to identify members to include by level.



- You can include "**all levels**" – so all workers across all levels will be members of the security group.
- You can **include specific levels** – so only workers in specified levels will be included as members of the security group.



Then when you use the security group in a security policy, members will be constrained to accessing data for **those in lower levels.**

This feature is intended for use with Talent Management functionality. We will edit the Worker Data: Talent Card security policy in the activity to demonstrate the feature.

CREATE AND DEPLOY LEVEL-BASED SECURITY GROUPS

1. Verify the leveling mechanism or hierarchy. Run: Maintain Compensation Grade Hierarchy task or Create Management Level Hierarchy task
2. Create a **Compensation Level-based** or **Manager Level-based security group**
3. Select: Applies to All or Applies to Levels (then choose level(s) from the prompt). **Levels included will determine the members of the security group**
4. Edit Security Policies
5. Activate Pending Security Policy Changes
6. Test (members target access will be constrained to those in lower levels)

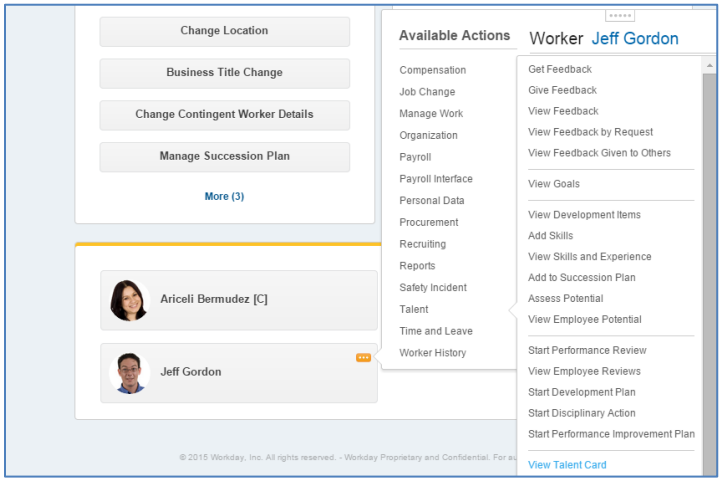
ACTIVITY 12 CREATE LEVEL-BASED SECURITY GROUP

Logan will use the Management Level hierarchy that has been created in the GMS tenant to create a level based security group that grants Manager access to all workers Talent Card below their level. This allows managers to recruit workers from organizations other than their own.

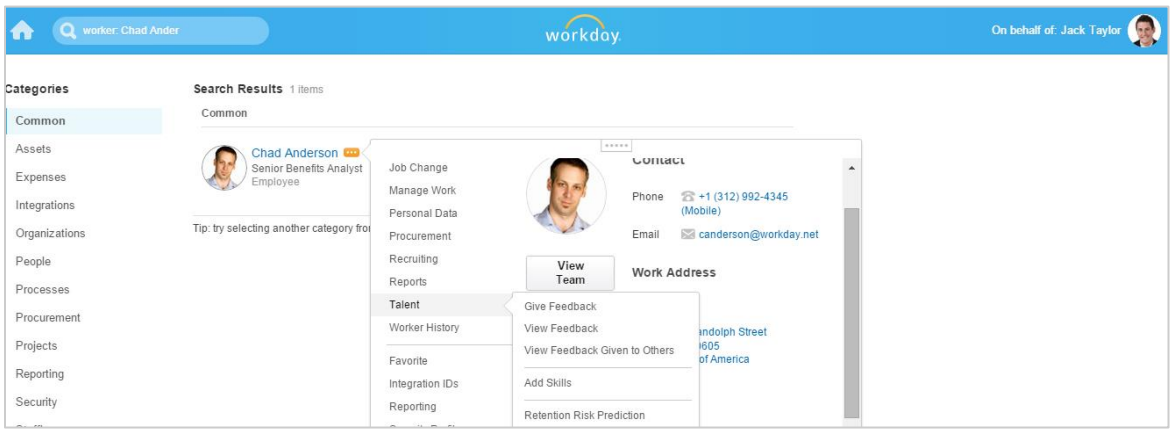
TASK 1: CHECK OUT EXISTING SECURITY

1. **Start Proxy** as Jack Taylor (jtaylor)

2. On Jack's **Home** page, click on the **My Team** worklet. At the bottom, see his team. See how Jack can access Jeff Gordon's, his direct report's, Talent Card. Using related actions, select **Jeff Gordon > Talent > View Talent Card**



3. Now from the search box, search for *Chad Anderson* and click to view his worker profile. Chad does not report to Jack Taylor. Using related actions, navigate to Talent and review the options. Note Jack **does not have an option to View Talent Card for Chad**.



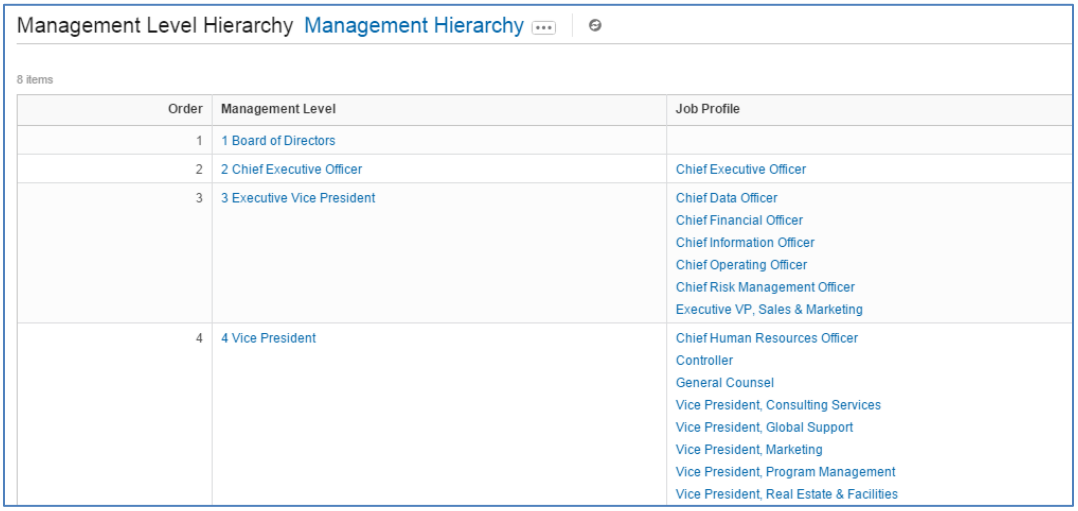
4. **Stop Proxy**

TASK 2: REVIEW MANAGEMENT LEVEL HIERARCHY

1. As Logan McNeil (lmcneil)

2. From the search box, run the task: **Management Level Hierarchy**

3. From the prompt, select **Management Hierarchy**. You will see 2 listed in the training tenant. Choose the second one, as the first one is empty. Here you can see job profiles designated to Management Levels.

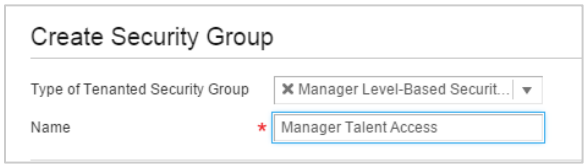


TASK 3: CREATE LEVEL-BASED SECURITY GROUP

1. From the search box, run the task: **Create Security Group**

2. Select **Manager Level-Based Security Group** as the Type of Tenanted Security Group

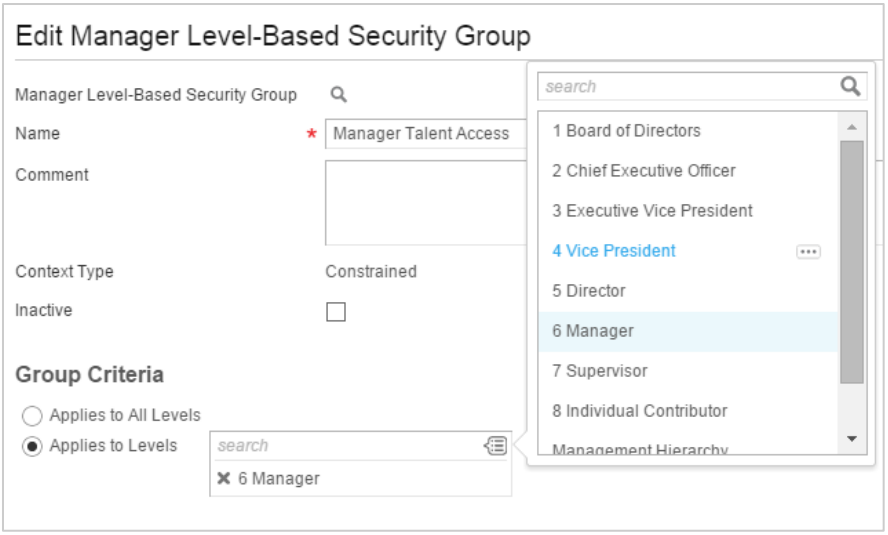
3. Enter the Name **Manager Talent Access**



4. Click the **OK** button

5. Set **Applies to Levels** to **6 Manager**

   We are going to **include those in level 6 as members** of our level-based security group.



6. Click **OK**

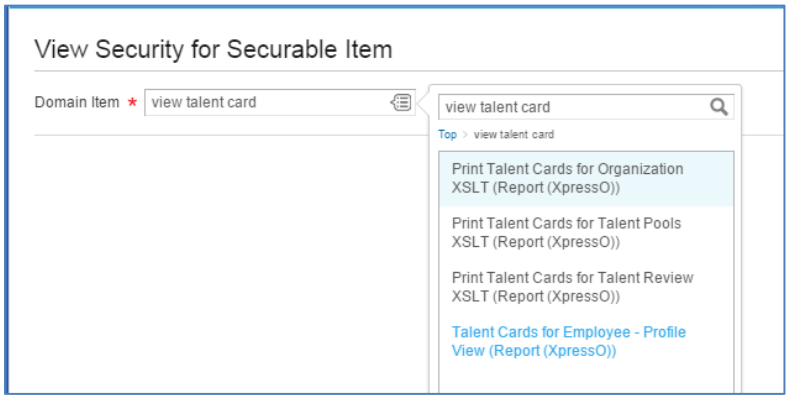
7. Click **Done**

TASK 4: EDIT SECURITY POLICY

1. From the search box, run the **View Security for Securable Item** report

2. Search for item: *View Talent Card*.

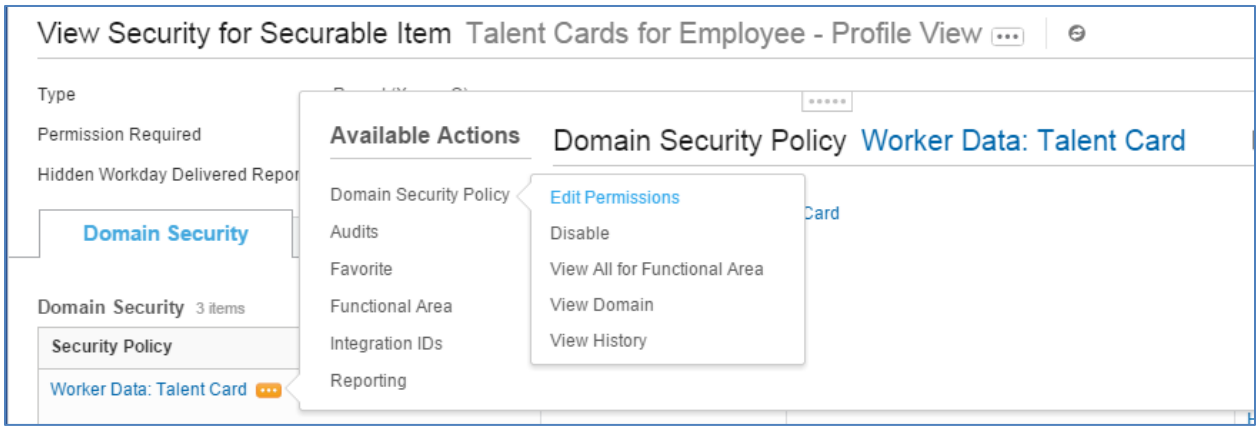
3. Select **Talent Cards for Employee – Profile View (Report (XpressO))** from the prompt



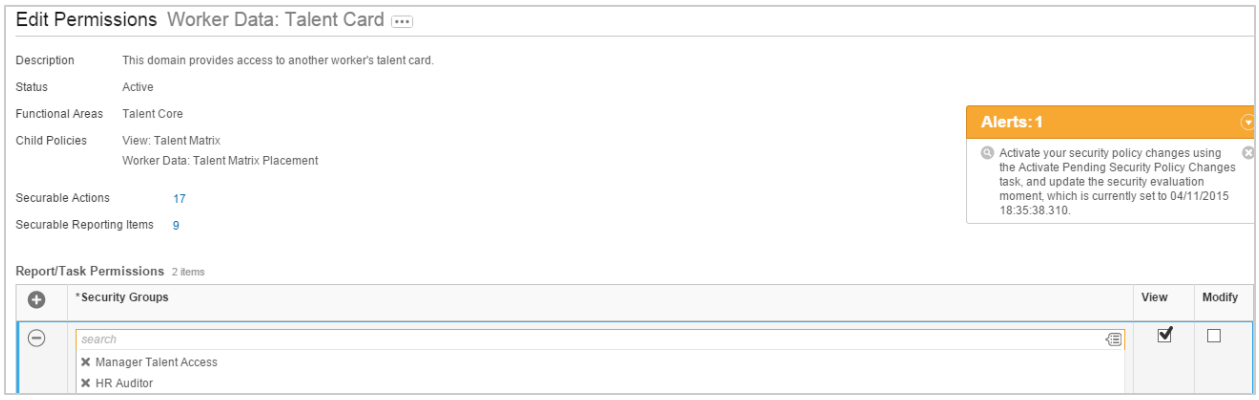
4. Click **OK**

5. Click the related action off the Security policy **Worker Data: Talent Card**

6. Navigate to **Domain Security Policy > Edit Permissions**



7. Add **Manager Talent Access** Security Group to provide **View** access



8. Click **OK** and then click **Done**

9. From the search box, run the task **Activate Pending Security Policy Changes**

10. Enter a comment, such as 'Activity 12'

11. Click OK

12. Check the Confirm checkbox

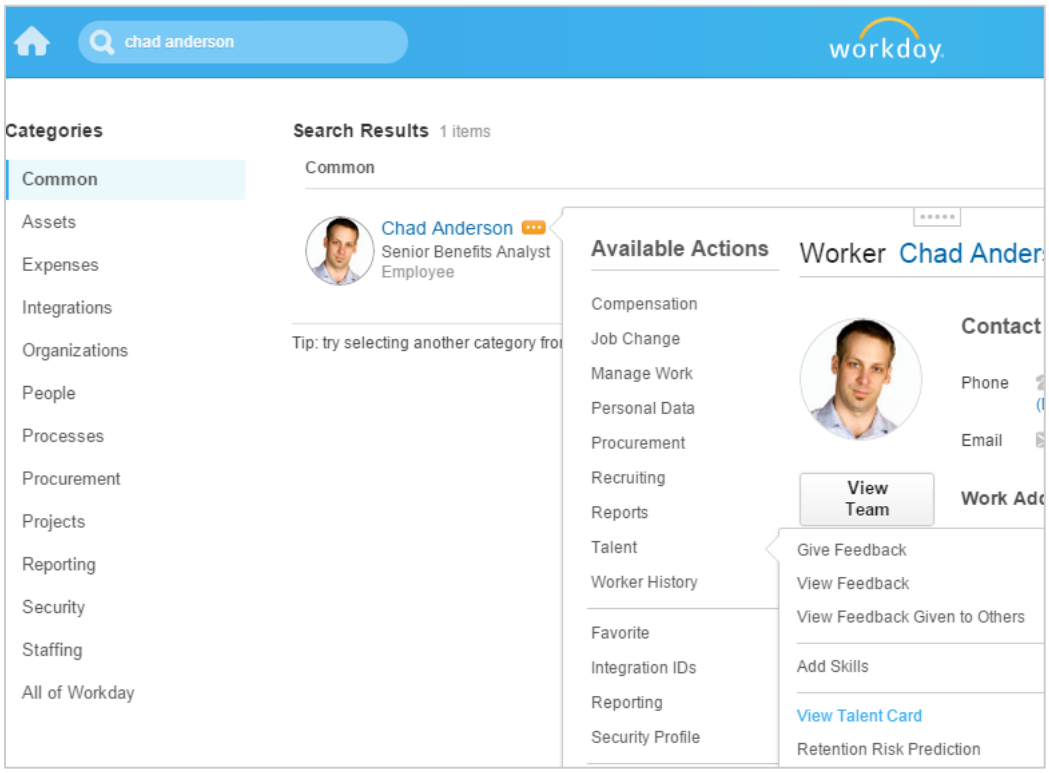
13. Click OK

TASK 5: TEST ACCESS

1. **Start Proxy** as Jack Taylor (**jtaylor**)

2. Search for *Chad Anderson*

3. From the related action icon, navigate to **Talent > View Talent Card**. Jack can now view the Talent Card of workers that do not report to him as long as they are in a lower management level.



4. Note that Jack can only access talent cards for workers who are below his management level.

5. To test further, see if Jack can *View Talent Card* for workers in same level or higher levels than him. His level based security group access to the domain to view talent card data should prevent him for accessing targets in same or higher levels, i.e. workers in management levels 1-6.

    a. James Walker (another manager at the same level as Jack)

    b. Steve Morgan (the CEO is at a higher level than Jack).

6. **Stop proxy**

(End of Activity)

SECURITY TIPS

SECURITY METHODOLOGY

Try to keep it as simple as possible. Start with user-based groups. Layer in role-based (constrained) groups. Think of your business partners first. Assign permissions at the highest node in the hierarchy to take advantage of inheritance, using the option for current and unassigned subordinates. Only assign at the lower levels when necessary.

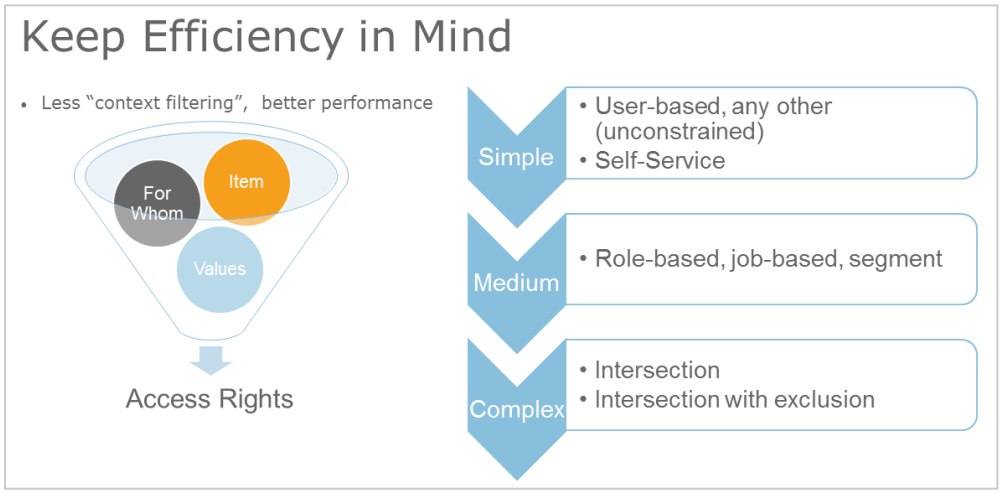
Leverage the default delivered security whenever possible. **More security groups, more edited permissions mean more MAINTENANCE!**

Model your organization structure
- Supervisory organization
  - Reporting structure (managers)
  - Functional/line of business
- Location hierarchy
  - Global/regional partners
- Company hierarchy
  - Financial transactions

DESIGN TOP DOWN

Remember that execution time and performance will be impacted as you configure greater constraints and filters on access. Keep efficiency and maintenance in mind.

- Start with user-based – ensure access to items and all instances.
- Move next to role-based and self-service.
- Use job-based only where role-based or user-based does not work.
- Be careful with intersection security groups as not all areas supported. Test!



MANAGING WORKFORCE SECURITY ASSIGNMENTS

As part of staffing transactions where workers are terminating or changing jobs, it is important to ensure security group membership, specifically revisiting **role-assignments** and **removing user-based security groups assignments**.

- Use the **Assign Roles** sub-process in staffing transaction business process definitions.
- Use delivered services, add service steps to staffing transaction business process definitions:
  - Service step to **Remove User-Based Security Groups**
  - Service step to **Terminate User Account**

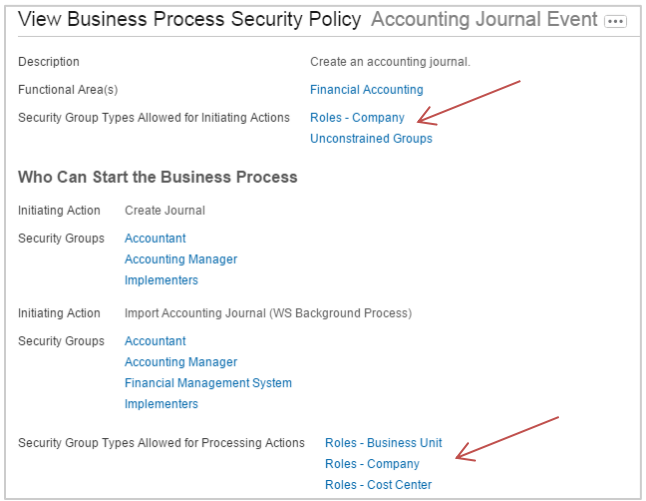
In addition, leverage delivered reports and shared solutions to audit changes.

Audit Workday Account Changes - Changes to User-Based Groups and/or Organization Role Assignments (for selected roles)	Custom Report Definition	Configurable Security, Cross Application Services	May-06-13	fwalterhouse

SECURITY POLICY RESTRICTIONS

As you design your security configuration and determine needed security groups and constraints, be aware that some domain and business process security policies can be **restricted to certain security group types.** Workday now explicitly disallows you from adding some security group types to business process or security domain policies to prevent applying security groups to policies for secured content. Workday provides these new report fields that enable you to report on disallowed security group types:

- Disallowed Security Group Types
- Security Group Types Disallowed for Initiating Actions
- Security Group Types Disallowed for Processing Actions



Configured **Organization type constraints** must match **the security policy type restrictions.**

- For example, when creating an Integration System or Service Center Based Security group constrained to a *company*, you cannot add this security group to a domain or to a business process security policy that is restricted to organization types other than *company*.

- Similarly, when you include a role-based security group with the role usage of *Company* (such as Accountant or Expense Analyst) in the Intersection Criteria or specify a *Company* in the Exclusion Criteria (Constrained Context), you cannot add the Intersection Security Group to a domain or to a business process security policy that is restricted to Organization types other than *Company*.

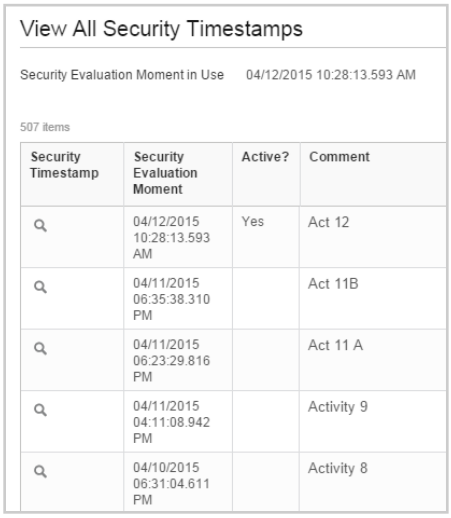
Check the Solution Catalog on Community for shared security configurations for specific products or features, like Recruiting, Performance Reviews, Staffing Actions and more!

Solution Type	Title	Update	Product / Features	Post date	Author
Security Configuration	New Worktags - Fund, Business Unit, Grant, Program and Object Class: Recommended Security Configuration		Financial Management, Worktags	Mar-24-15	jgeasa
Security Configuration	Authentication Policy SAML_EEOnly Outside Network	Workday 23 - Retired	Authentication, Authentication Policies, Cross Application Services	Feb-06-15	tmarquez2
Security Configuration	Resource Booking Request: Recommended Security Configuration	Workday 24	Financial Management, HCM, Projects	Oct-13-14	cyuan
Alternate Approach, Business Process Definition, Security Configuration	Route Financial Transactions to Non-Company Role for Review	Workday 23 - Retired	Financial Management	Sep-07-14	dwhite
Security Configuration	Recommended Security Configurations: Committees	Workday 23 - Retired	Cross Application Services, Education and Government, HCM	Aug-15-14	ljohnson10
Security Configuration	Recommended Supply and Demand Analytics Setup		HCM, Workforce Planning, Staffing	Aug-11-14	nsharma3
Security Configuration	Enhanced Resource Management: Recommended Setup	Workday 23 - Retired	Financial Management, Project Plans, Projects	Jul-21-14	cyuan

ACTIVATING PREVIOUS TIMESTAMPS

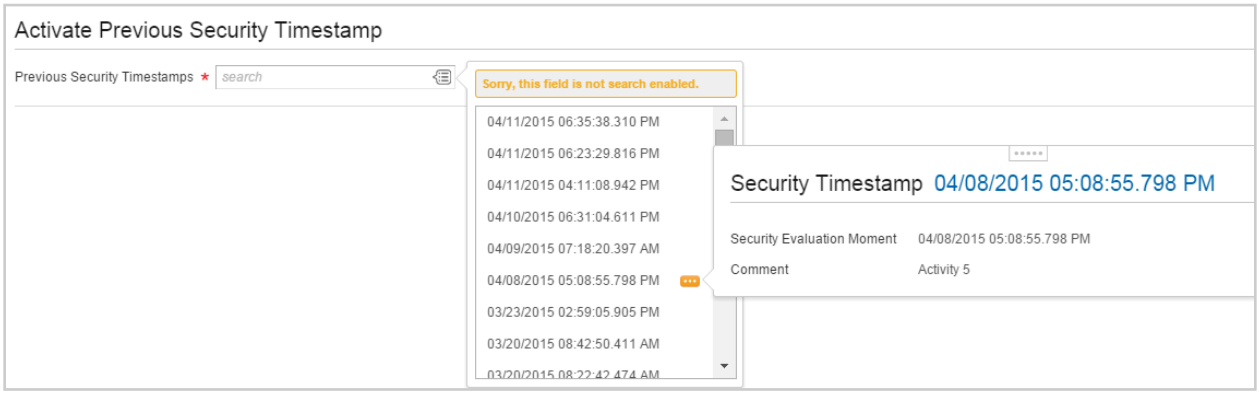
Every time you activate security, you establish a **Security Evaluation Moment** or "**Timestamp**" capturing the state of the domain and business process security policies as of that moment. All pending domain or business security policy edits *since the last activation are activated with each timestamp.*

The **View All Security Timestamps** report will show all the security policy activations in the tenant.



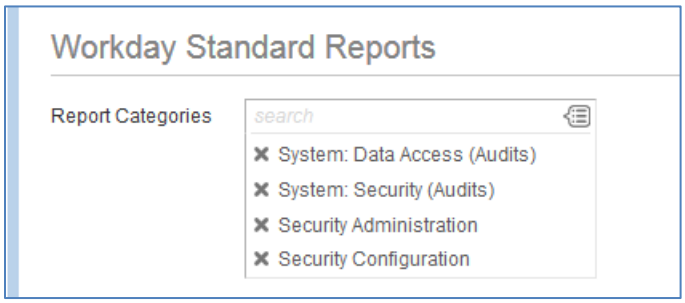
If there are issues with your security policies and you need to revert back to a previous timestamp, you can use the task: **Activate Previous Security Timestamp**.

- *All security policy edits since the reverted timestamp will go into a pending state.*
- *Activating a previous security timestamp will not impact security groups and membership, just security policies.*



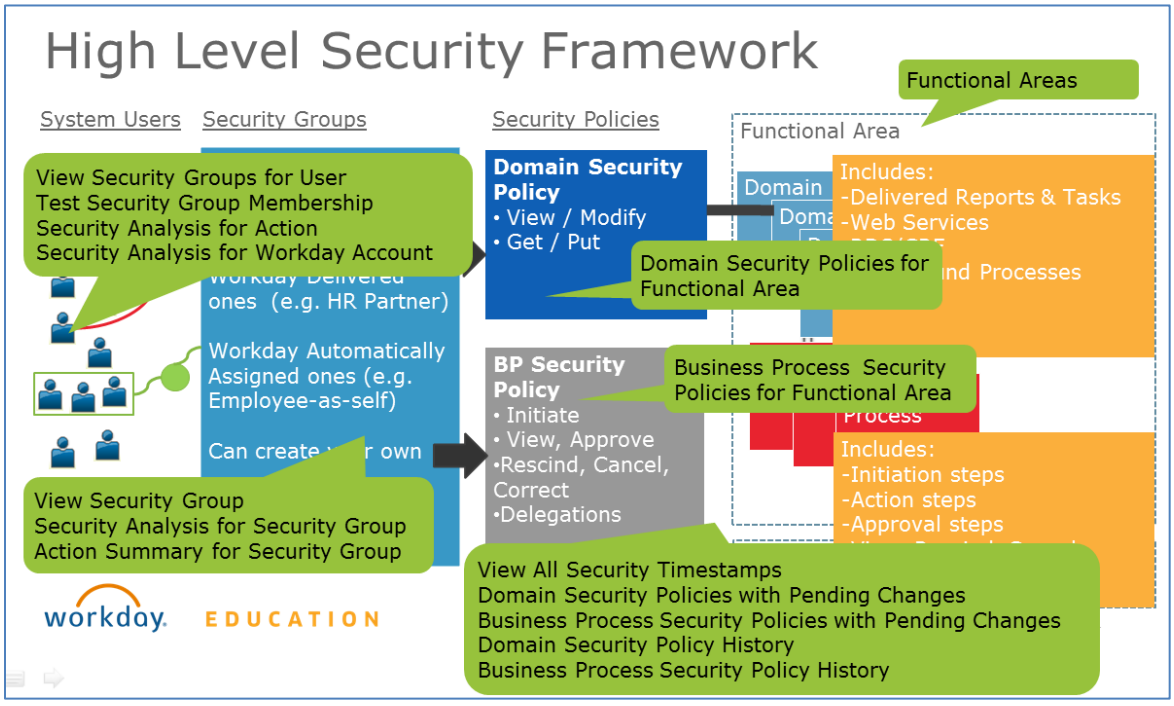
SECURITY-RELATED REPORTS

Workday delivers many security and audit related reports. To see the full list of delivered reports, run **Workday Standard Reports** for security related reporting categories.



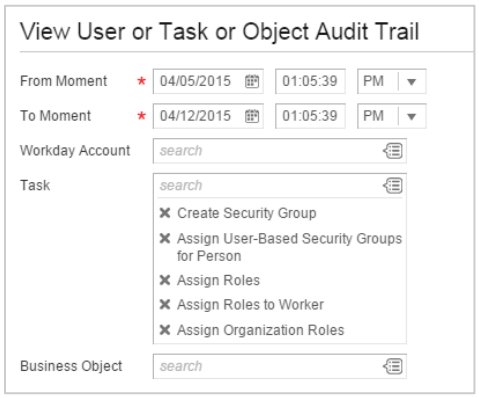
Some useful ones:

1. How can someone get access to this item?
   View Security for Securable Item
2. How did user X get access to this action?
   Security Analysis for Action
3. Does user X have access to instance 1, and through which security group
   Test Security Group Membership
4. What can a member of this group see and do?
   Action Summary for Security Group
5. Why can('t) a user can access something on the landing page?
   Security Analysis for Landing Page
6. What can a given user access?
   Security Analysis for Workday Account

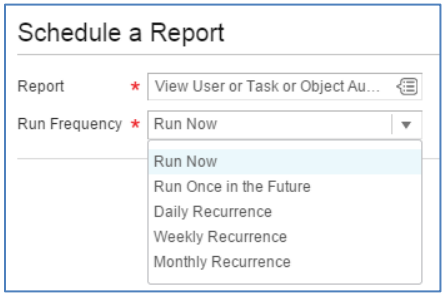


AUDIT TRAILS

A great report for example for audit information is: **View User or Task or Object Audit trail**. You can see an audit trail for a user, for a given task, or for a business object.



You can even schedule this report to run on a recurring basis.



Below is a list of sample delivered reports.

SECURITY GROUPS

To Report on...	**Look at this Report**
A functional area's security policies	• Security Policies for Functional Area • Business Process Security Policies for Functional Area • Maintain Functional Areas (You can enable/disable them from here.)
Security group's access, policies, and components	View Security Group
User-based security group's access, policies, and members	View Security Group
All security policies in all functional areas	Functional Areas

ORGANIZATIONS AND ROLES

To Report on...	Look at this Report
All assignable roles	Maintain Assignable Roles
A worker's organization roles	Role Assignments for Worker
Organization role assignments	Roles for Organization and Subordinates

SECURITY POLICIES

To Report on...	Look at this Report
Securable items that are accessible to a specific security group	Action Summary for Security Group
Security for securable items in a domain security policy	View Security for Securable Item
Securable items that are secured separately in more than one security policy	Secured Items in Multiple Domains
Domain security policies	Domain Security Policies for Functional Area
Who has changed which policies (and security groups) in the time range, and when	Domain Security Policies Changed within Time Range Business Process Security Policies Changed within Time Range
Policy changes that will go into effect the next time you activate pending changes.	Domain Security Policies with Pending Changes Business Process Security Policies with Pending Changes
What has changed for a specified policy	Domain Security Policy History Business Process Security Policy History
Business process Security policies	Business Process Security Policies for Functional Area
Securable items in a functional area grouped	Domain Security Policy Summary

SECURITY POLICIES

To Report on...	Look at this Report
by domain and security group	
Content of a domain	View Domain
Disabled or unused domains	Inactivated Domains
Security problems	Security Exception Audit
All domain and business process security policy changes you have made but have yet to activate	Domain Security Policies with Pending Changes Business Process Security Policies with Pending Changes

USERS

To Report on...	Look at this Report
A user's roles	Worker Roles Audit Role Assignments for Worker
A user's management level	Active Employees or view current job details on the View Worker page
A user's job profile	Worker Change History or view current job details on the View Worker page
A user's security groups	View Security Groups for User
How a specified user has access to a specified action	Security Analysis for Action
Is a user in a security group that has access to a target instance of a securable item?	Test Security Group Membership
An overview of a user's access	Security Analysis for Workday Account

JOB INFORMATION

To Report on...	**Look at this Report**
A list of workers by job profile	Directory by Job Profile
A list of workers by job family	Directory by Job Family
The details of a job profile	Job Profile
A list of job profiles by job family and job family group that details a job profile's management level, job classification and exempt/non-exempt status	Job Catalog

OPTIONAL LAB – SELF STUDY: SECURITY REPORTS

This FAQ is designed to introduce you to the various configurable security reports that are available. These reports can provide answers to many of the Frequently Asked Questions regarding Workday's Configurable Security.

As Logan McNeil (lmcneil)

TASK 1 - TO WHICH SECURITY GROUPS DOES A USER BELONG?

1. Search for '*Cardoza*'
2. Use Maria Cardoza's related action icon to initiate the Security Profile > View Security Groups report
3. How many security groups is Maria Cardoza a member of? _____
4. Click on the **Benefits Partner Security Group**
5. What kind of Security Group is Benefits Partner? _____
6. How many domains does this security group have access to?_____
7. How many business processes does this security group have access to?_____

TASK 2 - IF I KNOW THE REPORT OR TASK THAT I WANT TO PROVIDE ACCESS TO, HOW CAN I FIND THE SECURITY GROUPS THAT CAN BE USED?

1. Search for '*View Sec*'
2. Click the **View Security for Securable Item** report hyperlink
3. For Domain Item find and enter '*Maintain Role*
4. Choose the **Maintain Assignable Roles** task
    a. Which Functional Area is this item in? _____
    b. What domain is this task secured in?_____
    c. Which Security Groups have access to this task? _____

TASK 3 - I KNOW THE SECURITY GROUPS TO WHICH A USER BELONGS. HOW DO I DETERMINE WHICH TASKS THE USER HAS ACCESS TO?

1. Run the **Security Analysis for Workday Account** report for Noah to see an analysis of all actions available to Noah via each security group on his account.
2. What security group allows Noah to initiate the Period Close business process event? _____
3. What security group allows Noah to initiate the Request Budget Approval business process event? _____

TASK 4 - HOW DO I FIND OUT WHICH SECURABLE ITEMS ARE IN A FUNCTIONAL AREA OR A DOMAIN?

1. From the search box, run **View Domain**
2. Choose the **Worker Data: Compensation** domain
3. How many secured items are in the Worker Data: Compensation domain? ____
4. Click on the **Worker Data: Market Position Details** sub-domain hyperlink
5. Expand the Reports and Tasks section
6. How many reports and tasks are in this domain? _____
7. Click the related action icon off of the **View Market Position** task to initiate the Security > View Security Analysis for Action report
8. Enter *Noah Pierce* as the user
9. Click **OK**
10. What security group (s) allow Noah Pierce to get to the View Market Position task in the Worker Data: Market Position Details domain?_____

TASK 5 - HOW DO I ASSIGN SOMEONE TO BE A MEMBER OF A USER-BASED SECURITY GROUP? HOW DO I SEE A USER'S SECURITY GROUP MEMBERSHIP AND SECURITY HISTORY?

1. Search for *Noah Pierce*
2. Use the related action icon to initiate the **Security Profile** > **Security History for User** report

3. Enter *1/1/2000* and *today's date* for the date range

4. Click the **OK** button

5. After reviewing the report use the related action icon for Noah Pierce to initiate the **Security Profile** > **Assign User-Based Security Groups** task

6. Add the **Costing Administrator** security group

7. Is activation required to provide Noah access to Costing Administrator tasks? _____

(End of Activity)

TROUBLESHOOT SECURITY - FAQ

WHAT IF USERS CAN ACCESS AN ACTION TO WHICH THEY SHOULD NOT HAVE ACCESS?

1. Run the Security Analysis for Action report, specifying the name of the user and the action. This report shows all the ways in which the user is granted access to the action, even if the action appears in multiple domains.
2. Determine whether a security group needs to be removed from the security policy or the user needs to be removed from a security group.

This report is useful if you're trying to troubleshoot a user's access to a task, report or business process. It doesn't apply if you're trying to figure out why a person has access to a specific item, such as a data source, report field, or specific object, such as worker, position, or organization. The following reports can help in other cases:

View Security for Securable Item. This provides information about how an item is secured and what security groups are authorized for it.

Test Security Group Membership. This enables you to see a particular user's security group membership. This ability can be useful, for example, if you're trying to determine why a particular HR PARTNER can or cannot access a particular worker.

Which change you make might depend on how many other users there are in the security group. If you decide to remove the worker and it is not a user-based security group, you might have to unassign an organization role, modify the job profile or remove the worker from the organization or location, depending on what type of security group it is. Other options include removing a job profile, management level, organization, or location from a security group.

Be sure to consider how your change affects other access that the security group and the user might have. All changes to security groups or security policies are effective immediately.

Keep in mind that some secured items might appear in more than one domain. Workers who are granted different levels of access permission in different domains get the most access granted. For example, a worker who gets view permission (or no permission) to a secured item in one domain and modify permission to the same secured item in another domain, will get modify permission to the secured item. When a worker has access to a secured item to which access should be denied, run the Secured Items in Multiple Domains report to see if that item appears in another domain, and check to see if access it granted there.

You might also need to review the Access Rights to Organizations section in the security group definition and inheritance.

WHAT IF USERS CANNOT SEE AN ITEM TO WHICH THEY SHOULD HAVE ACCESS?

1. Run the View Security for Securable Item report, specifying the name of the securable item, such as a data source, report field, task, report, or business process.
2. Make a note of the security groups that have permission to access this securable item.
3. Run the View Security Groups for User report and specify the user who should be able to see the securable item.
4. Compare the security groups for the worker with the security groups for the securable item.
5. Determine whether the worker should be added to one of the security groups that has access to this item, or if a security group the worker is already in should be granted permission to access the item.

Which change you make might depend on how many other users there are in the security groups that the worker is in or what other access is granted if you associate the worker with a security group that already has access.

If trying to view a business process event, the user needs to be in a security group included in the View All or View Completed Only sections of the business process security policy. You also should look at Access Rights to Organizations in the security group definition (and at access rights gained through inheritance, if applicable).

HOW CAN SECURABLE ITEMS END UP WITH EXCEPTIONS AND HOW DO I FIX THEM?

Security exceptions usually happen when a legitimate security configuration encounters a change in the security policy that makes some access assignment invalid. Two possible causes are when you activate a pending security policy change in which a:

security policy specifies a group that you have deleted from Workday.

business process security policy is missing a group that the business process still uses.

Before you remove a security group from a business process security policy, remove the group from the various business processes in each organization that has a custom version defined. However, if you do not know all the places where a security group is used, or you have processes that are already running, you can still change the policy. You get a warning that the change will cause an exception.

The Security Exception Audit report identifies any problem area. The problem and solution are explained for each exception. Generally, all you have to do is remove the invalid security group from the policy or business process.

For business processes that are already started, reassign the step that is routed to an invalid user, or rescind the process. In either case, be sure to change the business process definition for that organization to specify only valid security groups.

WHERE CAN I SEE ALL THE PERMISSIONS GRANTED TO A SECURITY GROUP?

Use the View Security Group report. This report has a Security Permissions tab for the domain security policies and a Business Process Permissions tab for the business process security policies. Navigate to any security policy and see the securable items to which access permission is granted. You also can use the Action Summary for Security Group report to view details regarding domain security policies and business process security policies for a specific security group.

WHERE CAN I FIND OUT WHERE AND HOW SECURABLE ITEMS ARE SECURED?

Run the View Security for Securable Item report.

HOW DO I ADD USERS TO A USER-BASED SECURITY GROUP?

To add members to a user-based security group use the Assign User to User-Based Security Group task.

To add a user to more than one user-based security group at a time, use the Assign User-Based Security Groups for Person task.

WHY DOES A USER RECEIVE AN ERROR WHEN ATTEMPTING TO ACCESS AN INBOX ITEM OR EMAIL NOTIFICATION LINK?

It's possible that you configured a user to perform a step in a business process but, after the process was initiated, someone changed the security policy for that business process. Now the user does not have access permission and cannot respond. Usually, this is caused when the security group assigned to the step does not have View All access (for in-process events) or View Completed Only access (for completed events).

Run the Security Exception Audit report and look for that business process.

Also run the Business Process Policy View Audit report to identify security groups that do not have view access to particular components of business process types that might involve them.

The appropriate person should reassign the errant step and redefine the process to ensure that only valid security groups are specified.

HOW DID A USER GET ACCESS TO A PARTICULAR INSTANCE, SUCH AS A WORKER?

It is possible for a user to get access to a worker through several different role-based security groups. If you want to remove that user's access to the worker, it is useful to know which of the user's role-based security groups are providing that access.

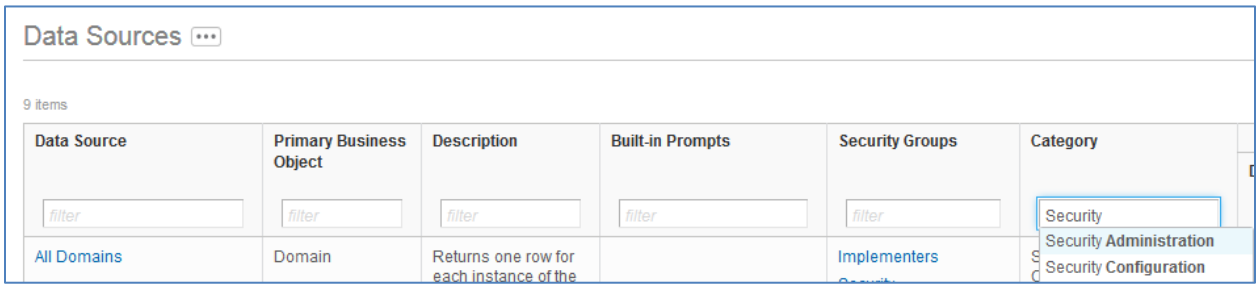
1. Use the Security Analysis for Action report to determine how the user got access to the action that accessed the worker. Make note of the security groups the user has that provide access to that action.
2. Obtain the instance ID for the worker the user can access.
3. Run the Test Security Group Membership report, supplying the user and the instance. Supply one security group at a time, until you determine which security group is providing that access. Or you can look at the security groups assigned to the user or the role assignments for the user.

HOW DO I SET UP SECURITY FOR EXTERNAL APPLICATIONS THAT USE THE WORKDAY WEB SERVICES API?

For information on setting up security for the Workday Web Services API, see Set Up Authorization Security for Workday Web Services.

CUSTOM SECURITY REPORTS

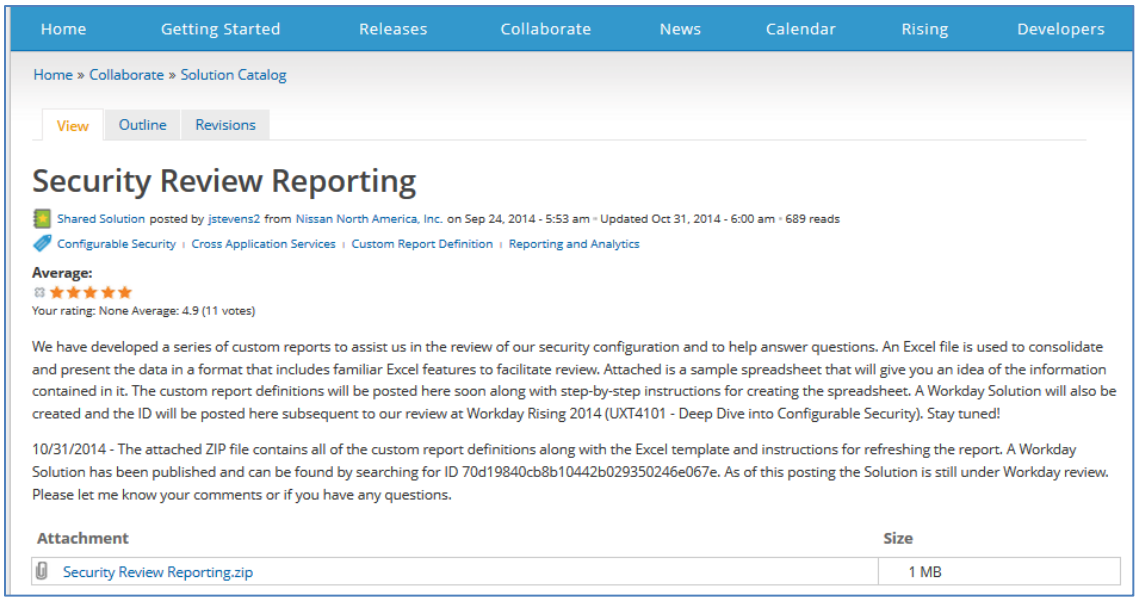
You can also write **custom reports** using report data sources that allow you to report on security related objects. You can, for example, report on domains, security groups, policies and accounts. To see list of available data sources, run the Data Sources report for security related categories.



Check out a shared customer example of a reporting tool used to manage security configurations:

Search for: "Security Review Reporting" in the Workday Community

Link: **https://community.workday.com/node/96768**



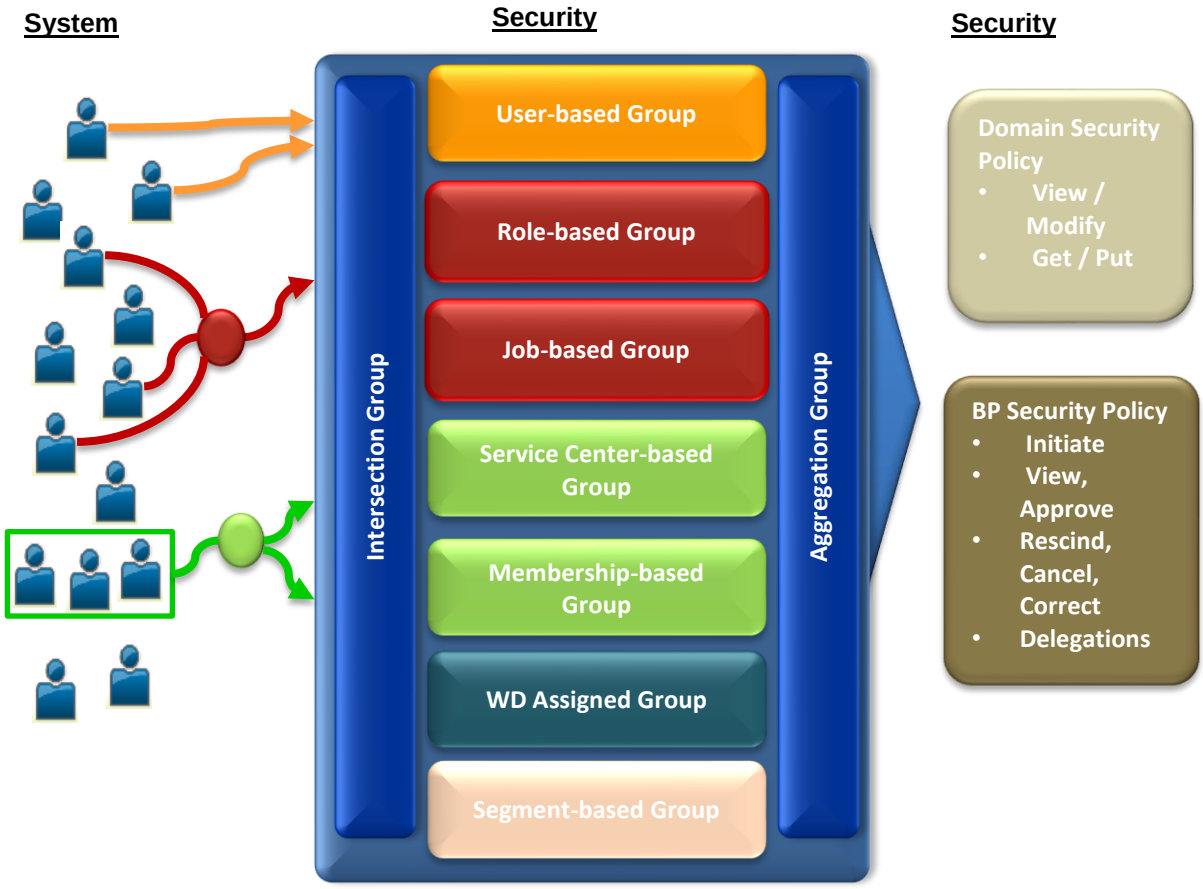
Included are the report definitions, excel template and steps. This solution was shared at Rising 2014. See presentation and video for more background:
https://community.workday.com/event/rising2014/95166

Other helpful tips and reports:

- Audit account activity: https://community.workday.com/node/95570
- Audit group/role changes: https://community.workday.com/node/60388
- Compare security group permissions between accounts https://community.workday.com/node/81569
- Compare security groups' permissions https://community.workday.com/node/81498

REVIEW

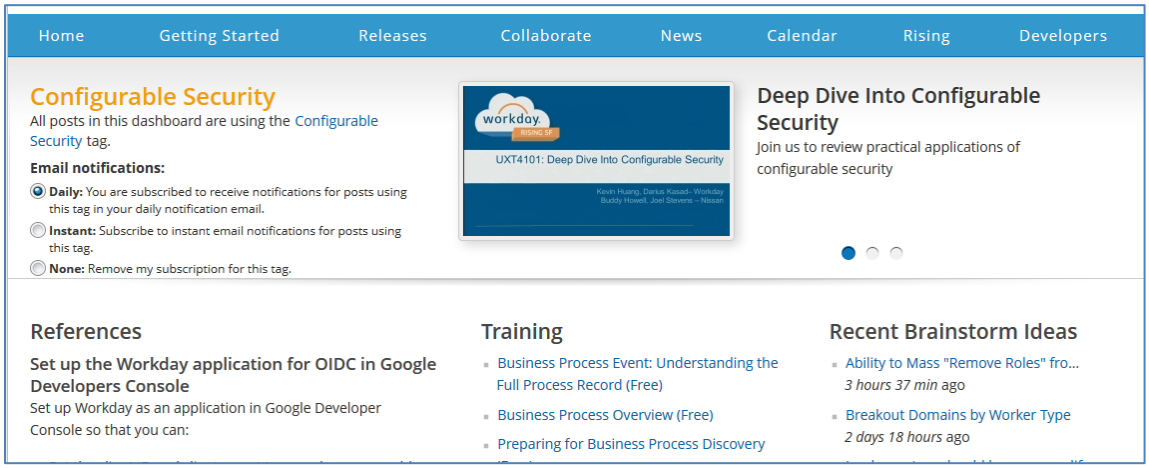
Workday's security framework allows you to configure which users have access to the delivered content via security policy configurations. **Security groups are the bridge between system users and security policies.** You can configure security groups in needed domain or business process security policies to grant access to security group members to delivered areas of Workday.



WHERE TO GO FROM HERE

Be sure to visit the Community **Product Dashboard on Configurable Security** for more information around:

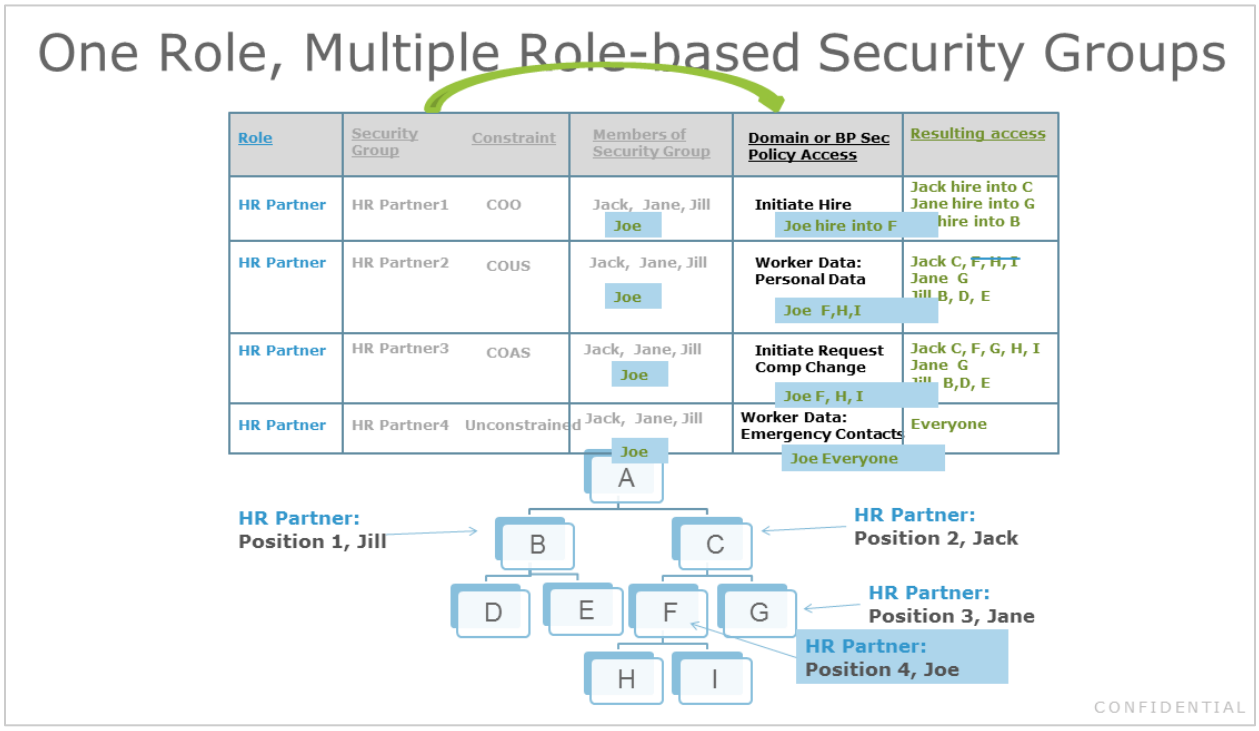
- Documentation
- Shared Solutions – Solution Catalog
- Posts & Ideas
- Presentations
- Training



Be sure to check out shared solutions, reports and tools, as well as presentations that can serve as great refreshers and supplements.

APPENDIX

WALKTHROUGH SOLUTION – ONE ROLE, MULTIPLE ROLE-BASED SECURITY GROUPS

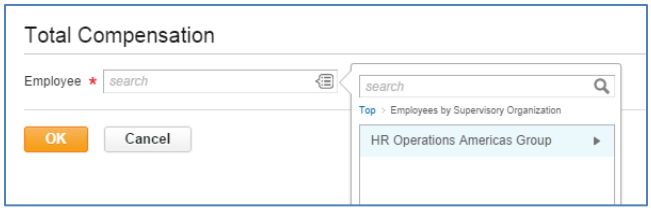


WORKSHOP 1 –ROLE-BASED CONSTRAINED SECURITY GROUPS

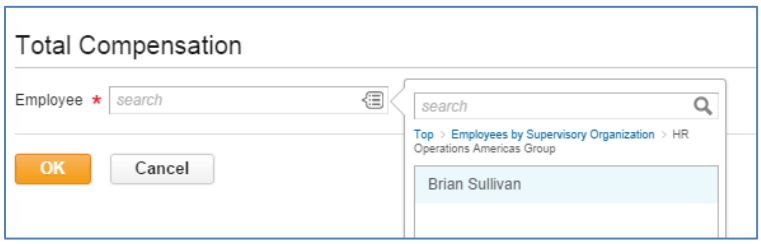
Scenario: Assign Yolanda Torres to the Compensation Partner role for Supervisory Organization: Field Sales North America. Assign Brian Sullivan to the Compensation Partner by Location role for the Location Hierarchy USA-Northeast, USA-Southeast, Canada – Eastern. See how their access can be configured and constrained to different organization types.

TASK 1: VERIFY EXISTING SECURITY

1. **Start proxy** as Yolanda Torres
2. Run the *Total Compensation* report
3. See how she only has access to her own supervisory organization and within that organization, only to her own data



4. **Start proxy** as Brian Sullivan
5. Run the *Total Compensation* report
6. See how Brian similarly, only has access to his own supervisory organization and his own data only.

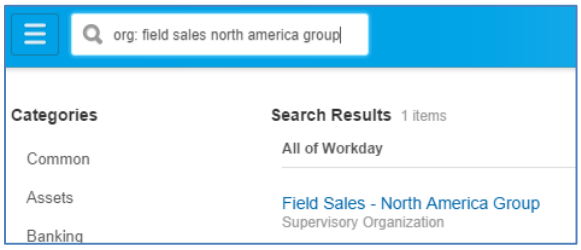


7. **Stop Proxy**

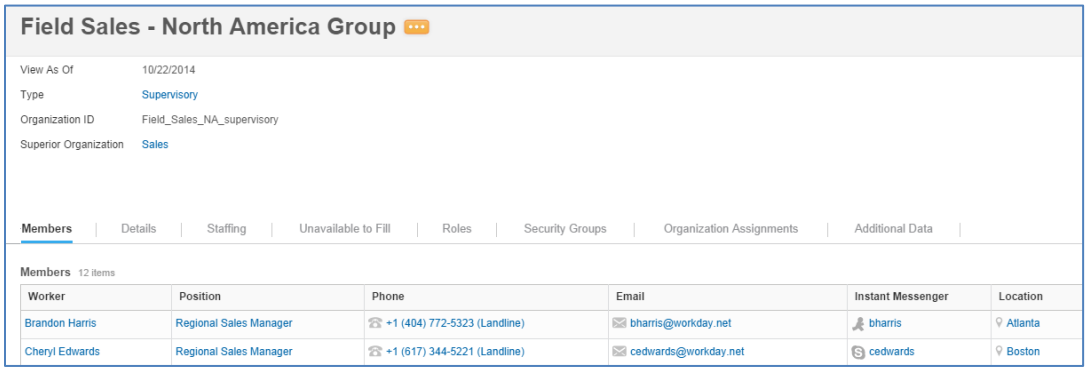
TASK 2 – ASSIGN ROLES

1. **As Logan (lmcneil),** from the search box, let's look at a supervisory organization

   a. Run *org: Field Sales North America Group*

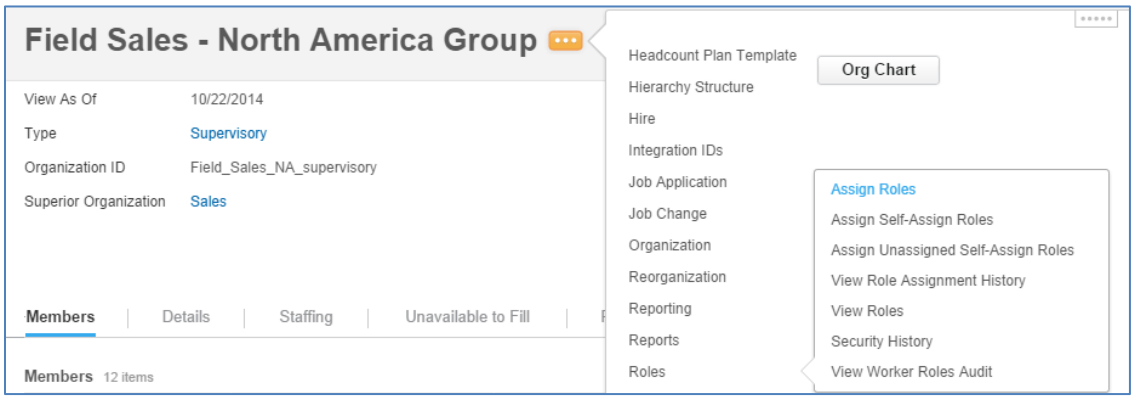


2. Click on the supervisory organization to see the members.



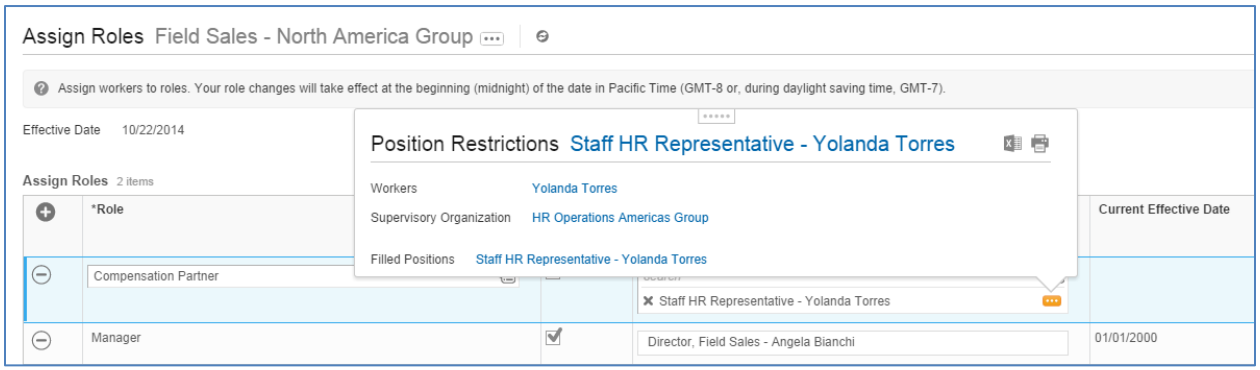
3. Let's assign Yolanda Torres' position as the Compensation Partner for this supervisory organization, where she will support and be constrained to these 12 target members.

4. Using related actions off the organization, select **Roles > Assign Roles**



5. Click OK to accept the effective date of the role assignment.

6. Add a row and assign Yolanda's position to the Compensation Partner role. Note how the role assignment is not to the worker or person, but to a position.

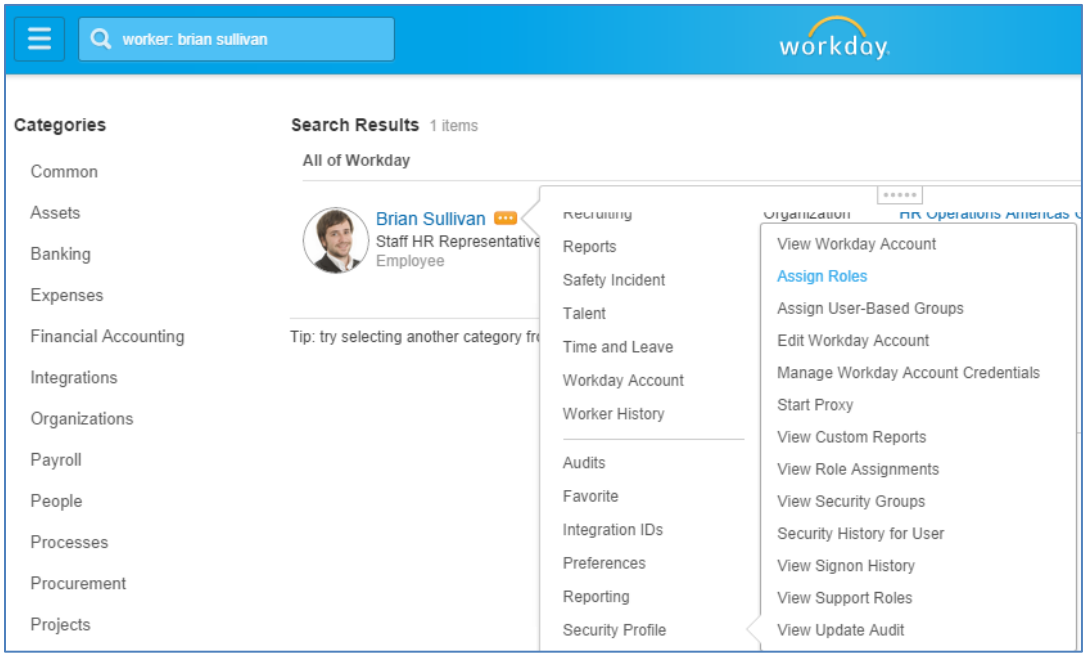


7. Click OK to save.

Yolanda is now in the role and thus a member of any role-based security groups that use the Compensation Partner role.

8. Now let's assign a role to Brian's position. From the search box, search **worker: Brian Sullivan**

9. Using related actions, select **Security Profile > Assign Roles**



10. Click OK to accept the effective date of the role assignment.

11. Add a row and enter as follows:

Field Name	***Entry Value***
Role Enabled for	USA – Southeast US *(be sure to pick the location hierarchy instance, not region)*
Role	Compensation Partner by Location
Assigned to	Brian Sullivan, Staff HR Representative

12. Add a second row and enter:

Field Name	***Entry Value***
Role Enabled for	USA – Northeast US *(be sure to pick the location hierarchy instance, not region)*
Role	Compensation Partner by Location
Assigned to	Brian Sullivan, Staff HR Representative

13. Add a third row and enter:

Field Name	***Entry Value***
Role Enabled for	CAN – Eastern Canada *(be sure to pick the location hierarchy instance, not region)*
Role	Compensation Partner by Location
Assigned to	Brian Sullivan, Staff HR Representative

14. Click **Submit** when done.

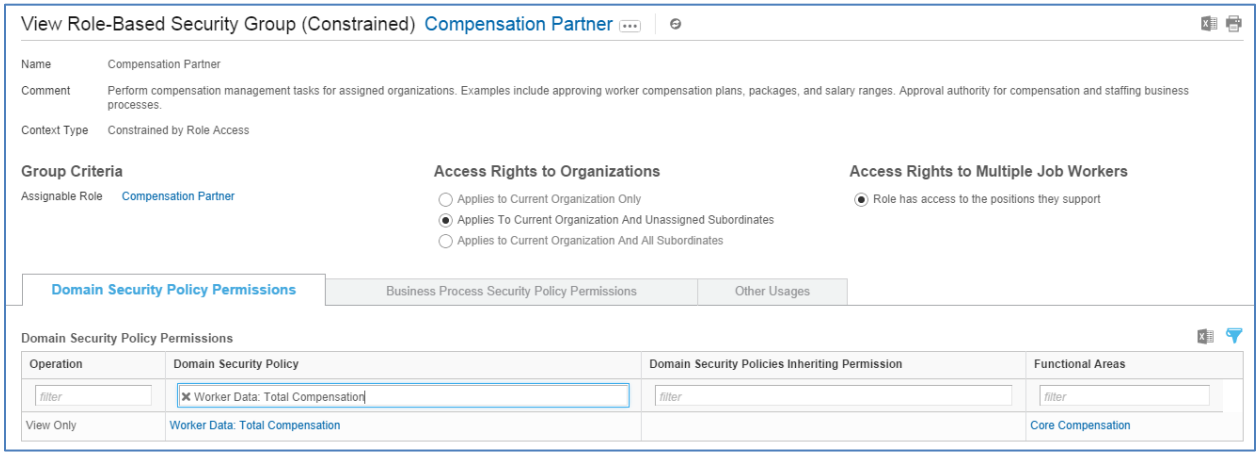
Brian is now in the role and thus a member of any role-based security groups that use the Compensation Partner by Location role. He now supports and can be constrained to those in the selected location hierarchies.

TASK 3 – VERIFY THE ROLE-BASED SECURITY GROUPS AND ACCESS TO POLICIES

1. From the search box, run **View Security Group**

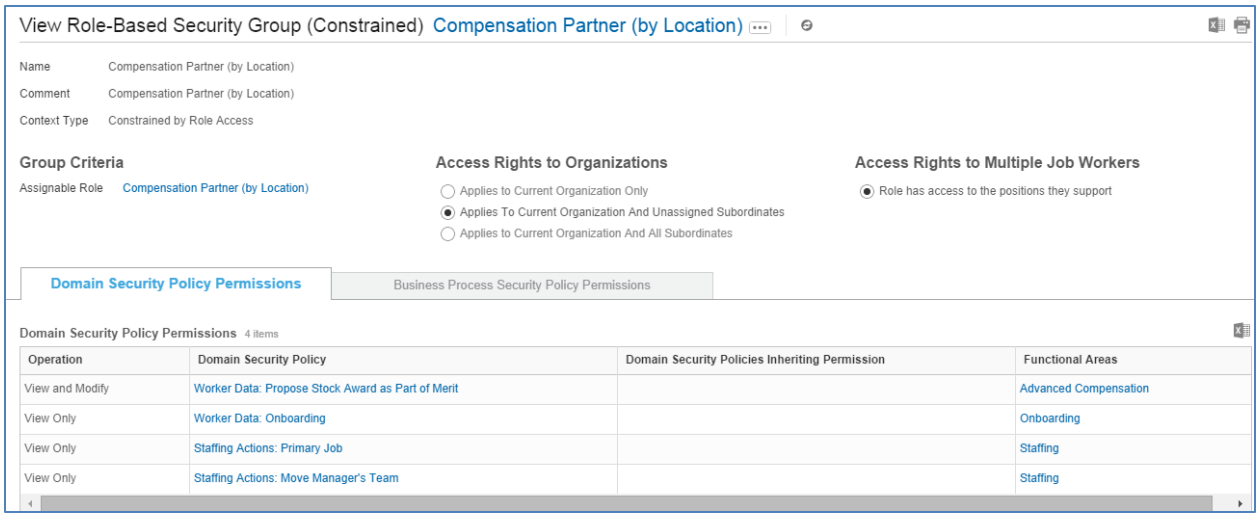
2. Select the role-based constrained security group: *Compensation Partner*

3. See how this security group is constrained (Access Rights to Organization) and has access to the Domain: Worker Data Total Compensation



4. Rerun the **View Security Group** report. This time select the security group: *Compensation Partner (by Location).*

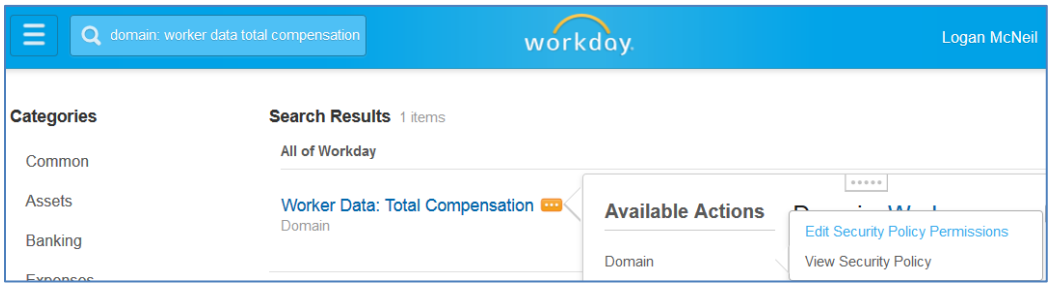
5. See how this security group is constrained (Access Rights to Organizations) but does NOT have access to the domain: Worker Data Total Compensation.



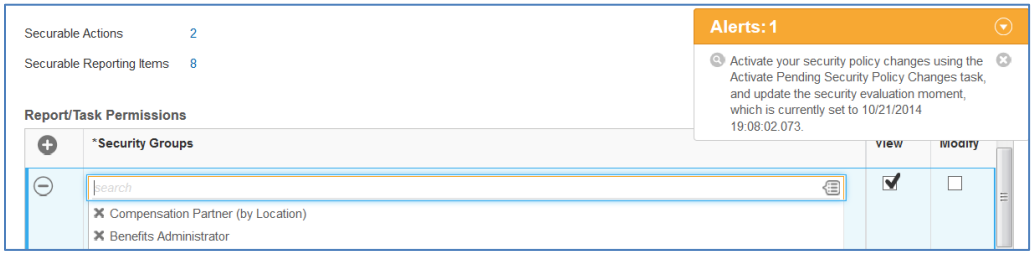
6. Let's configure access to this domain.

7. From the search box, run *domain: Worker Data Total Compensation*

8. Using related actions, select **Domain > Edit Security Policy Permissions**

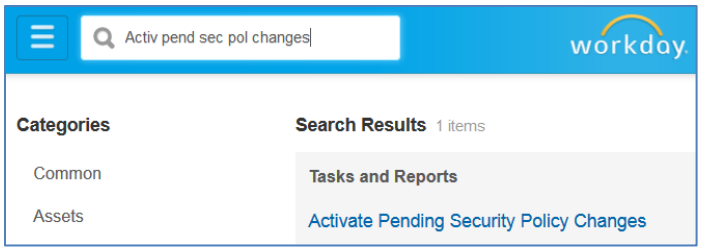


9. Add the *Compensation Partner (by Location)* Security Group



10. Click OK to save

11. From the search box, run **Activate Pending Security Policy Changes**



12. Capture comments: *Allow Comp Partner By Location Access to domain: Worker Data Total Compensation*

13. *Click OK*

14. Confirm by selecting the checkbox and click OK.

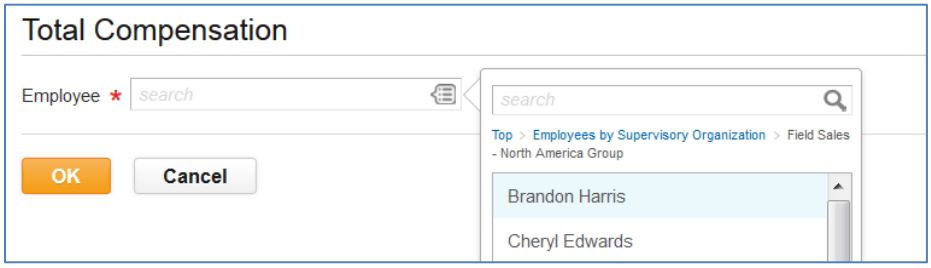
15. Now, Brian and Yolanda should have access to the Total Compensation report with their new role-based access.

TASK 3 – TEST

1. **Start proxy** as Yolanda Torres

2. Run the *Total Compensation* report

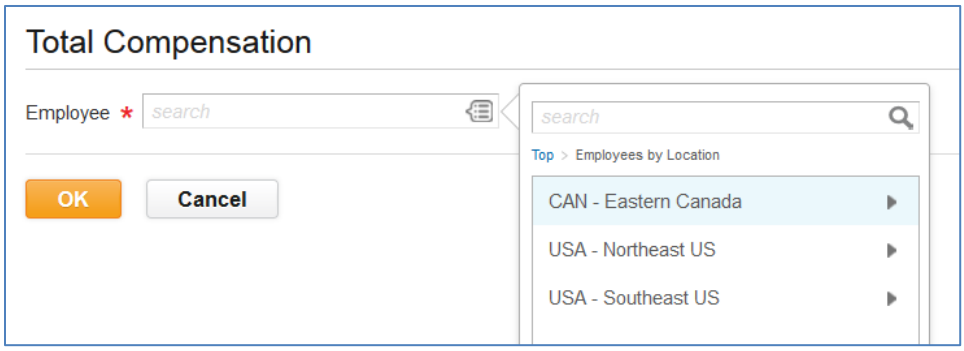
3. See how Yolanda can now access the target instances in the Field Sales North America Group (the organization she supports in the Comp Partner role), along with her own data too.



4. **Start proxy** as Brian Sullivan

5. Run the *Total Compensation* report

6. See how Brian can now access target instances for locations in USA Northeast, Southeast and Eastern Canada.



7. **Stop proxy**

CONCLUSION

- Role-based security groups allow you to identify users by role-assignment on their positions.
- Role-based security groups can be configured with constraints, where members are constrained to secured items or target instances in organizations for which their position is in that role.
- By configuring a role-based constrained security group to, for example, a domain security policy, you are allowing all members (all those in the role) to 'get there', i.e. get to items in that domain, however 'once there' you can them constrain their target context "for whom" they see data to the organizations that they are supporting in that role.

(End of Activity)

WORKSHOP 2 –ROLE-BASED UNCONSTRAINED SECURITY GROUP

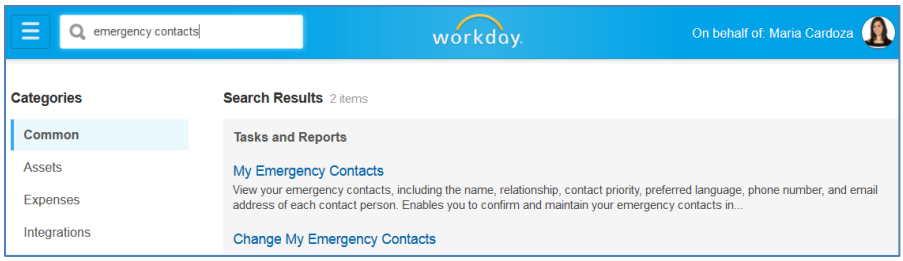
Scenario: Those in the Manager role cannot currently view emergency contacts. Create an unconstrained role-based security group for the Manager role and give it access to domain: worker data emergency contacts, allowing any user in the manager role to view emergency contacts for anyone in the tenant (unconstrained)

TASK 1: VERIFY EXISTING SECURITY

1. **Start Proxy** as Maria Cardoza

2. See what emergency contacts tasks Maria has access to. From the search box, run *emergency contacts*

    a. See how Maria can only access self-service emergency contact items. She cannot view emergency contacts for other workers

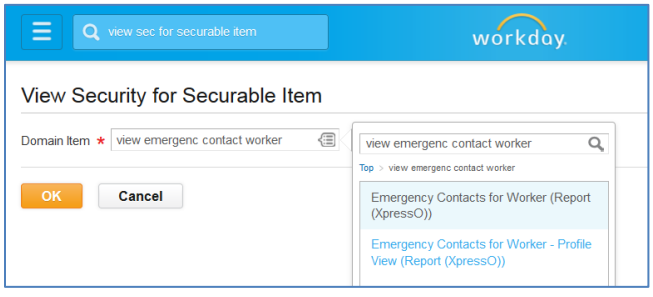


3. **Stop Proxy**

4. As Logan, let's first determine how the 'View emergency contacts for worker' item is secured.

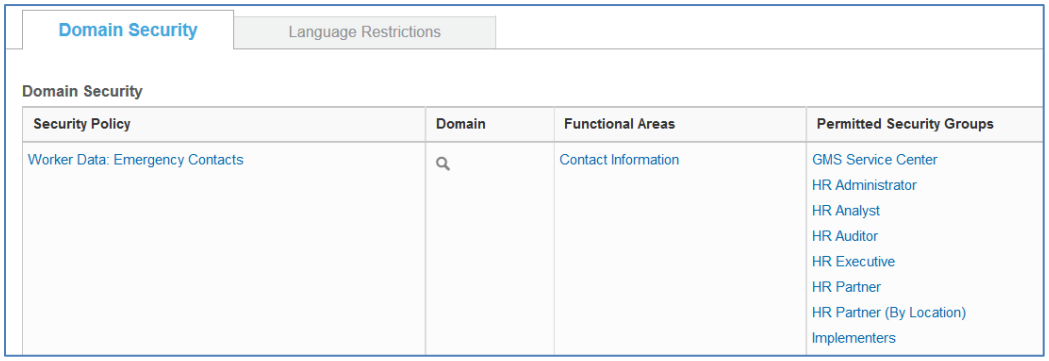
    a. From the search box, run **View Security for Securable Item**

    b. Select item: *View Emergency Contacts for Worker*



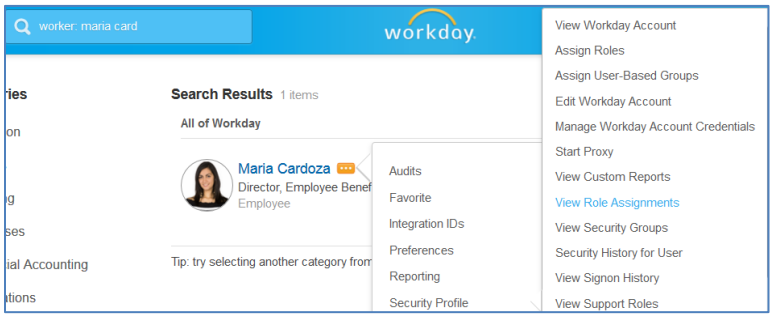
5. Click OK

6. See how this item is secured in the **domain: Worker Data Emergency Contacts**. See the permitted security groups. Maria does not have any of these permitted security groups on her profile.

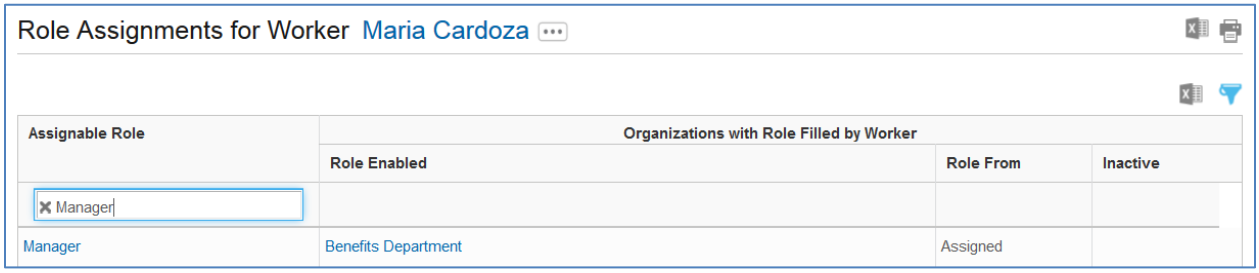


7. From the search box, run *worker: Maria Cardoza*

   a. Using related actions, select **Security Profile > View Role Assignments**



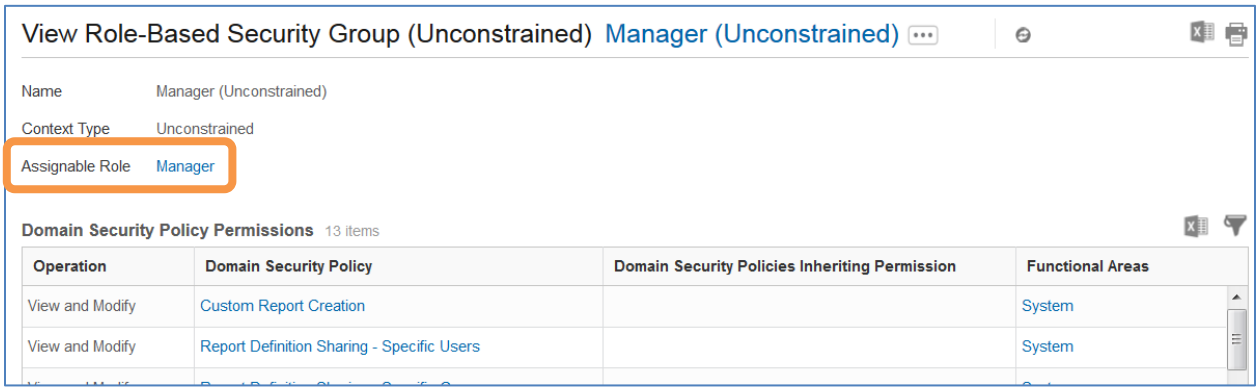
8. See how she is assigned several roles. She is the manager of the benefits department



9. We will now give all those in the manager role access to view emergency contacts for workers, even if the workers are not in their managed department, i.e. unconstrained access using a role-based unconstrained security group type.

TASK 2 – VIEW EXISTING ROLE-BASED UNCONSTRAINED SECURITY GROUP

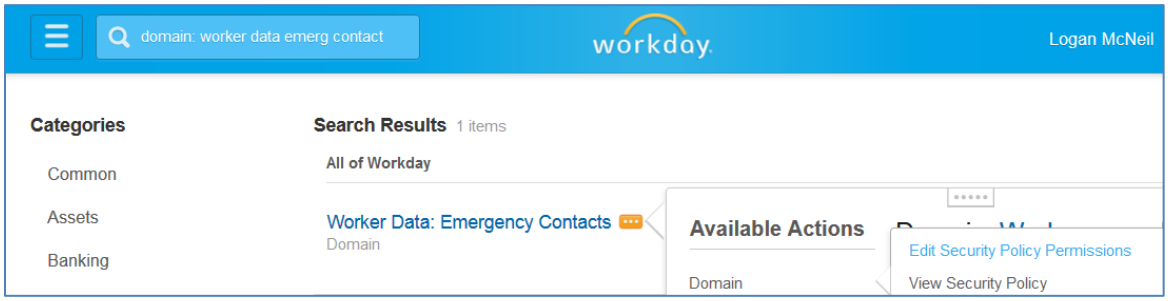
1. Still logged in as Logan, from the search box, run the task: **View Security Group**
2. From the prompt, select *Security Groups > Role-based Unconstrained > Manager (Unconstrained)*
    a. See how the security group just references the '**Assignable Role': Manager**
        i. Anyone assigned in the manager role will be a member of this security group.
    b. See how there are no organization access rights configured. This is an **unconstrained** security group.
    c. This security group currently has unconstrained access to 13 domains in the tenant.
    d. We will next add this security group to the domain: Worker Data Emergency Contacts.



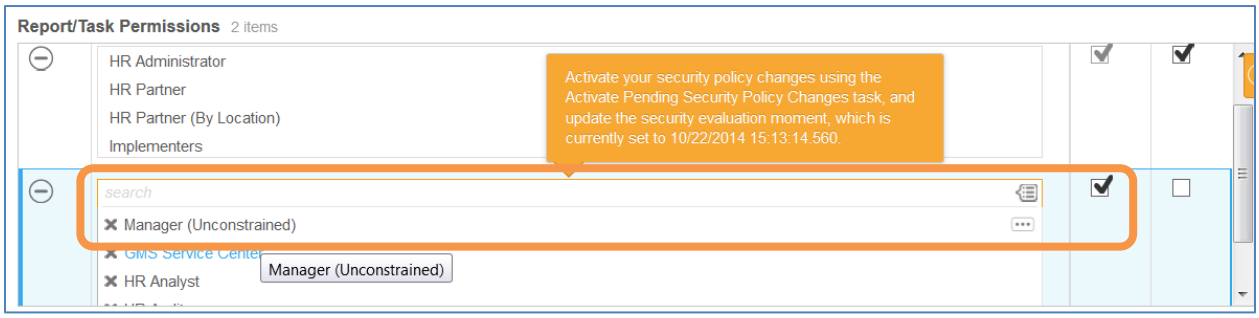
3. Click OK

TASK 3- GIVE THE MANAGER UNCONSTRAINED ROLE BASED SECURITY GROUP ACCESS TO VIEW EMERGENCY CONTACTS FOR WORKERS

1. From the search box, run: *domain: worker data emergency contacts*
    a. Using related actions, select **Domain > Edit Security Policy Permissions**



2. Add the 'Manager (Unconstrained)' security group to the view only permissions set of security groups (not Modify permissions).



3. Click OK to save. Remember that edits to security policies are saved and pending until you activate.

4. From the search box, run the task: **Activate pending security policy changes**

5. Enter a comment: *Allow Manager Unconstrained security group access to view Domain: Worker Data Emergency Contacts*

6. Click OK

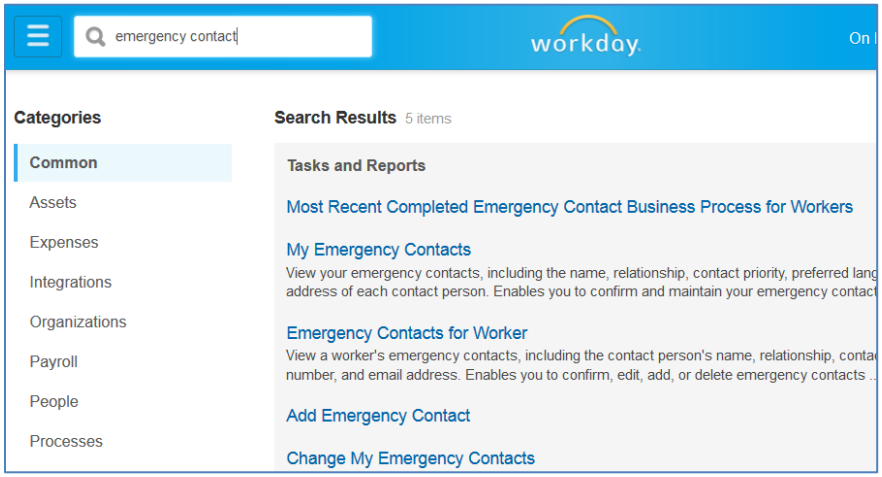
7. Confirm change and click OK.

TASK 4 - TEST

1. **Start Proxy** as Maria Cardoza

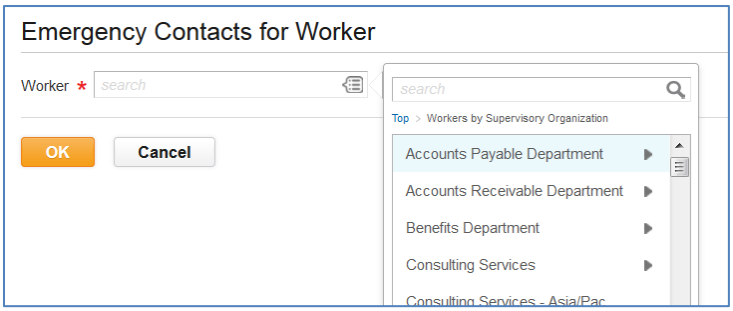
2. From the search box, run *emergency contact*

    a. *See how now Maria has access to view emergency contacts for workers, not just her own.*



3. Run the **Emergency Contacts for Worker** report

a. See how Maria can run this for ANY worker in any supervisory organization. Her access 'once here' is unconstrained.



4. **Stop proxy**

CONCLUSION

- Role-based unconstrained security groups can be effective and easy ways to identify those in a given role to then grant them unconstrained access.
- There may be areas of Workday that require unconstrained security groups, so if you are looking to grant access to such areas for those in a given role, a role-based unconstrained security group could be easier to maintain than manually assigning user-based security groups.
- Examples, can include:
    a. All those in a manager role can create custom reports
    b. All those in an HR Partner role can proxy on behalf of All Employees

(End of Activity)

WORKSHOP 3 – CONSTRAIN ROLE-BASED ACCESS TO BOTH THE SUPERVISORY AND LOCATION HIERARCHY

Brian Sullivan is currently the Compensation partner by Location for USA-Northeast, USA-Southeast and Canada Eastern. Let's intersect his access to only be for those in the *Field Sales North America Group supervisory organization that are in those locations.*

*** THIS WORKSHOP ASSUMES WORKSHOP 1 HAS BEEN COMPLETED ****

TASK 1: CURRENT ACCESS

1. Let's check Brian Sullivan's role-assignments and security groups.

2. From the search box, run *worker: Brian Sullivan*

    a. Using related actions, select **Security Profile > View Role Assignments**

Role Assignments for Worker Brian Sullivan

3 items

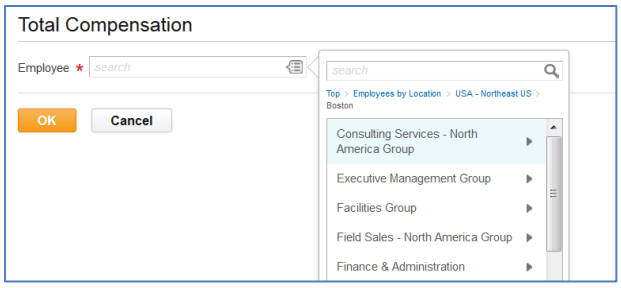
Assignable Role	Organizations with Role Filled by Worker		
	Role Enabled	Role From	Inactive
Compensation Partner (by Location)	CAN - Eastern Canada	Assigned	
	USA - Northeast US	Assigned	
	USA - Southeast US	Assigned	

3. See how Brian's position is assigned to the role: Compensation Partner (by location).

    a. Given the role assignment, Brian is therefore a member of the Compensation Partner (by Location) security group that uses this role.

4. As we saw in an earlier activity, this security group has access to the domain: Worker Data: Total Compensation

    a. Brian can run the *Total Compensation* report for any worker (target instance) in these locations, across supervisory organizations.



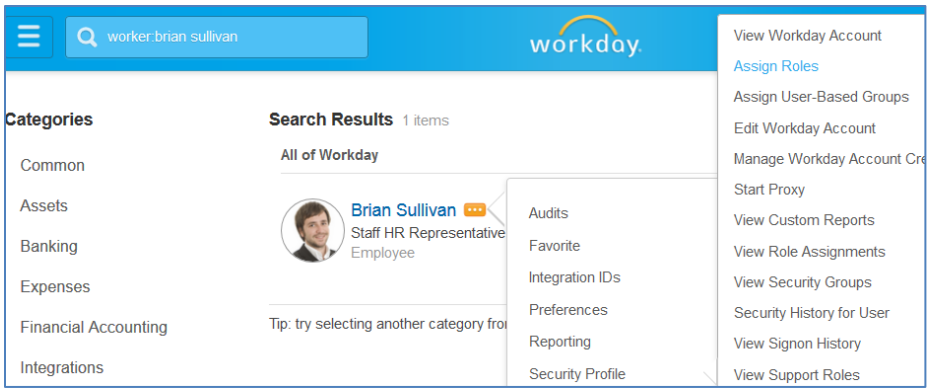
5. We will now limit his access to only those workers in the **supervisory organization: Field Sales North America Group that are in the locations that he supports.**

Worker	Supervisory Organization	Location	Location Hierarchy
Brandon Harris	Field Sales - North America Group	Atlanta	USA - Southeast US
Cheryl Edwards	Field Sales - North America Group	Boston	Storage North America
Donna Owens	Field Sales - North America Group	Dallas	USA - Northeast US Storage North America
Isabelle Blanc	Field Sales - North America Group	Montreal	USA - Southeast US CAN - Eastern Canada
Jennifer Carter	Field Sales - North America Group	Chicago	USA - Central US
Juan Delgado	Field Sales - North America Group	New York	USA - Northeast US
Madeline Fleming	Field Sales - North America Group	San Francisco	USA - Western US
Melanie Watson	Field Sales - North America Group	New York	USA - Northeast US
Neal Jackson	Field Sales - North America Group	Chicago	USA - Central US
Rodrigo Sanchez	Field Sales - North America Group	San Francisco	USA - Western US
Ryan Taylor	Field Sales - North America Group	Vancouver	CAN - Western Canada
Tyler Ross	Field Sales - North America Group	Chicago	USA - Central US

TASK 2 – ASSIGN BRIAN AS THE COMPENSATION PARTNER FOR THE SUPERVISORY ORGANIZATION: FIELD SALES NORTH AMERICA GROUP

1. **As Logan**, from the search box, run *worker: Brian Sullivan*

    a. Using related actions, select **Security Profile > Assign Roles**



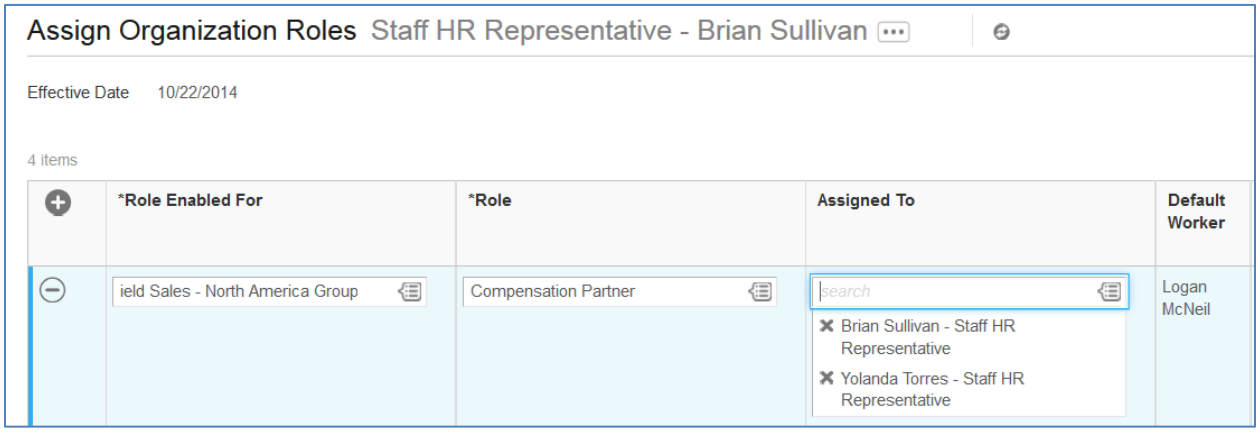
2. Click ok to accept the effective date of the role assignment

3. Add a role,

    a. *Role Enabled for: *Field Sales North America Group* (this is a supervisory organization)

    b. *Role *Compensation Partner*.

    c. Assigned to: Keep Yolanda's position in the role, and add Brian Sullivan's position.



4. Click **Submit**

5. Brian is now also a member of the Compensation partner security group (like Yolanda).

6. Let's now intersect the access.

TASK 3: INTERSECT THE COMPENSATION PARTNER AND COMPENSATION PARTNER BY LOCAITON SECURITY GROUPS TO INTERSECT THE MEMBERS AND CONSTRAINTS

1. From the search box, run the task: **Create Security Group**

    a. **Type:** Intersection

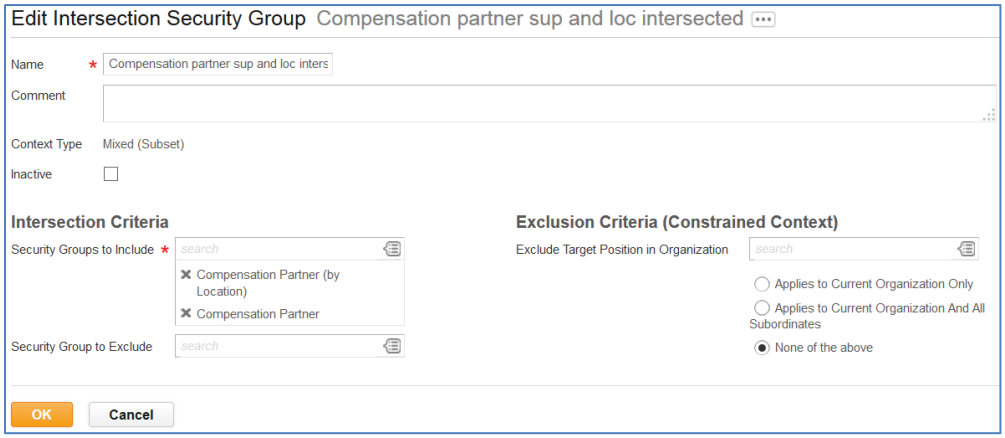
    b. **Name:** Compensation Partner Sup and Loc Intersected

c. Click **OK**

d. For the Intersection Criteria, include the two security groups:

i. Compensation partner

ii. Compensation partner by location



e. Click OK to save.

2. Now, let's *replace the security group access* for the **domain: worker data total compensation**

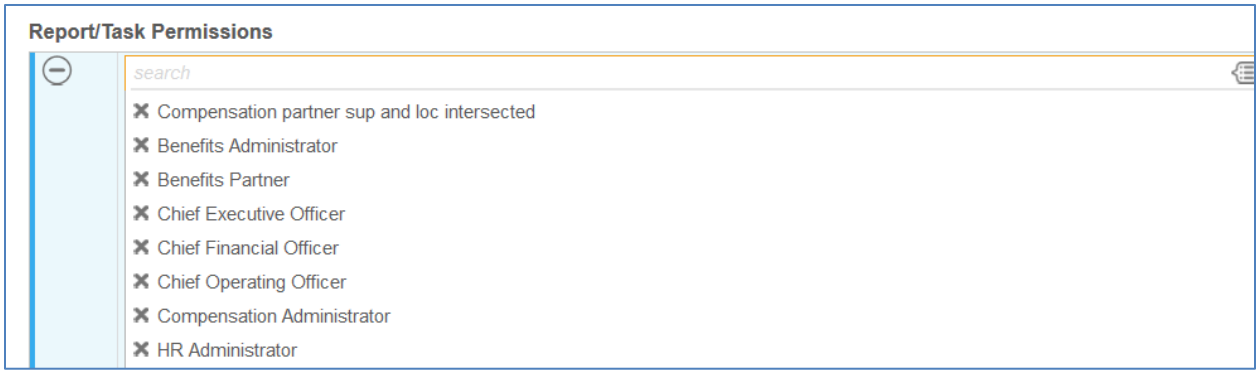
3. From the search box, search **domain: Worker data total compensation**

a. Using related actions, select **Domain > Edit Security Policy Permissions**

b. **Remove** the *Compensation partner* security group

c. **Remove** the *Compensation partner by location* security group

d. Add the new intersection security group: *Compensation Partner sup and loc intersected*



e. Click ok to save

4. From the search box run the task: **Activate Pending Security Policy Changes**

5. Add comment – *limit comp partner access to locations AND sup orgs that they support.*

6. Click OK

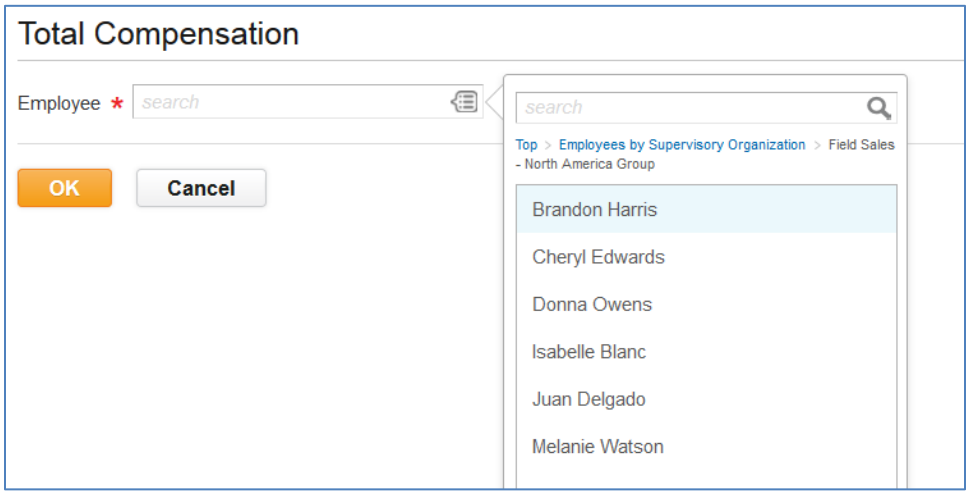
7. Confirm and Click OK

TASK 4 - TEST

1. **Start proxy** as Brian Sullivan

2. Run the *Total Compensation* report

3. See how now Brian only has access to target instances in the Fields Sales North America organization who are in locations that he supports.



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Rodrigo Sanchez	Field Sales - North America Group	San Francisco	USA - Western US
Ryan Taylor	Field Sales - North America Group	Vancouver	CAN - Western Canada
Tyler Ross	Field Sales - North America Group	Chicago	USA - Central US

4. **Stop proxy**

Important: In this activity we only changed one domain to demonstrate the intersection security. It will be imperative to **review and replace all existing references** to compensation partner security group, or compensation partner by location security group, and to replace as needed with the intersection security group.

CONCLUSION

Intersection security groups can help enforce constraints where targets need to be intersected between different organization types (e.g. sup organization and location hierarchy, cost center and supervisory organization)

(End of Activity)

REVIEW QUESTIONS & ANSWERS

What report shows a top down view of how the Workday application is delivered?
- **Functional Areas**

Can you change what items are in what domains?
- **No**

What are the 2 types of security policies?
- **Domain Security Policies**
- **Business Process Security Policies**

What is the purpose of the 2 tasks associated with change control?
- **Activate Pending Security Policy Changes**
  - To make saved security changes effective
- **Activate Previous Time Stamp**
  - To revert to the last known good version of your security configuration

When a security group is constrained or context sensitive, what will members be constrained to?
- **Organization(s)**
- **Segment(s)**
- **Level(s)**

True or False: When editing a security policy, users are added to policies to grant permissions.
- **False – security groups are added to security policies to grant permissions.**

If a domain has 100 items, you can grant access to 50 of the 100
- **False – access is at the domain level, to all items in the domain.**

What are characteristics of User- Based Security Groups?
- **Manually assigned to a user**
- **Follows the user**
- **Unconstrained access**

What are some characteristics of a role-based security group?
- **References a role**
- **Membership based on role assignment**
- **Roles are assigned to positions**
- **Members can be constrained to organizations they support in role**
- **Workday delivers starting roles and role-based security groups**

When would you use a service center based security group?
- **When you need to configure access in Workday for third party users (not workers)**

(Yes or No) Can you grant access to only one item in a domain? (E.g. if a domain contains 12 secured items, can you grant access to only one of the items and not the other 11 items?)
- **No – security is granted at a domain level, i.e. to all secured items in that domain.**

(Yes or No) Can you change what items are in what domains?
- **No – Workday delivered secured items in defined domains**

How can you find out what's delivered in terms of delivered areas/domains/business processes?
- **Functional Areas report**
- **Domain Security Policies for Functional Area**
- **Business Process Security Policies for Functional Area**

If you know the item you need to give access to, how do you know what security policy to update?
- Run **View Security for Securable Item** to determine the domain or BP the item is in

(Yes or No) Can you create new security groups beyond what's delivered?
- **Yes, you can configure new security groups**
    - **Create Security Group**

(Yes or No) Can you create new security group types beyond what's delivered?
- **No – Workday determines the different types of security groups you can configure**
    - **e.g. role-based, job-based, etc.**

In order to give a user access to a given item (e.g. a delivered report, task, data source), what do you have to do?
- **Identify the domain or business process security policy that secures the given item**
- **Identify user via a security group**
- **Modify corresponding security policy with security group**
- **Activate Pending Security Policy Changes**
- **Test**

How can you find out what a security group has access to?
- **View Security Group**
- **Action Summary for Security Group**
- **Security Analysis for Security Group**

How can you find out what a given user has access to?
- **Security Analysis for Workday Account**
- **View Security Groups for User**

When would you use a user-based security group?
- **Workday delivers many**
- **Tends to be for your Administrators**
- **Target access needs to unconstrained (system-wide/tenant wide)**
- **Assignment is manual/specific to a person/follows the person**

When would you use a role-based security group?
- **For your support or leadership staff**
- **Helps you identify members by role assignment on their position**
- **Allows you to constrain target access to organizations supported in role**
- **Workday delivers starting roles and role-based security groups**

True/False – you must manually assign and re-assign job-based security groups as workers terminate and change jobs?
- **False – Job based security group membership is automatically maintained as workers change jobs and terminate.**

What are some example criteria that you can use in a job based security group to identify members?
- **Job Profile**
- **Job Category**
- **Job Family**

- **Management Level**
- **Work Shift**
- **Include Exempt Jobs**
- **Include Non Exempt Jobs**

True/False – You can segment any area of Workday
- **False – Workday determines what areas can be segmented.**
    - **Compensation Setup**
    - **Compensation Plan Assignments**
    - **Expense Items**
    - **Pay Components**
    - **Integrations**
    - **Etc.**

True/False – You must manually assign location and organization membership security groups to workers.
- **False - Workers are automatically members of Location or Organization Membership Security Groups if they are in Locations or Organizations included in the security group**

True/False - If you configure a location or organization membership security group in a domain or bp security policy, resulting access will be constrained to the location or organization specified
- **False – location and organization membership security groups are unconstrained. Workday does not make any attempt to match the context or constraint.**
- **The location and organization specified are only the criteria for identifying members.**

When would you consider an intersection security group?
- **Limiting self-service to a given population**
- **Need to constrain target access by different organization types**
- **Need to exclude target instances from context the user would have otherwise seen**

True/False – Intersection security groups perform similarly to any other security group type (e.g. user-based, role-based) and can be used in any area of Workday.
- **False – Intersection security groups are more complex and can impact performance.**
- **Intersection security groups have limitations.**
- **Intersection security groups should be used sparingly and should be carefully tested.**

What must be done before you can use Level-Based security groups?
- **A Leveling mechanism (hierarchy) must be set up**

NOTES: