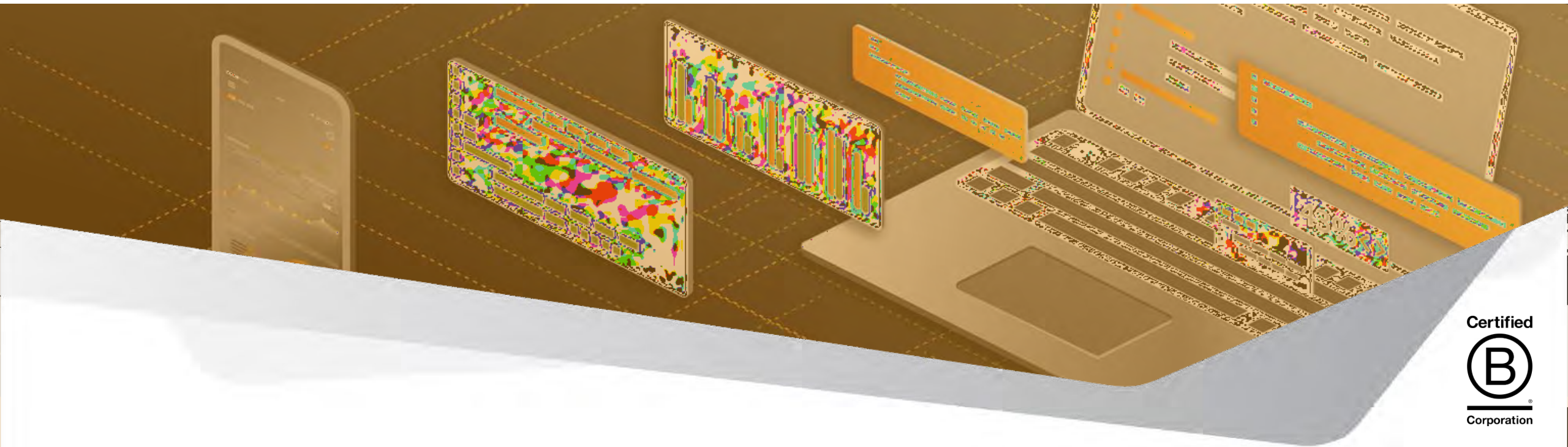


WEBINAR

Mastering Workday: Ask an Expert Series

Session: **Unlocking Workday: Exploring Advanced Features Beyond Your Implementation**



WELCOME

Today's Experts



Austin Callaro

Practice Leader |
Armanino
Advisory LLC

Request Framework

**Unlocking Workday: Exploring Advanced Features
Beyond Your Implementation**

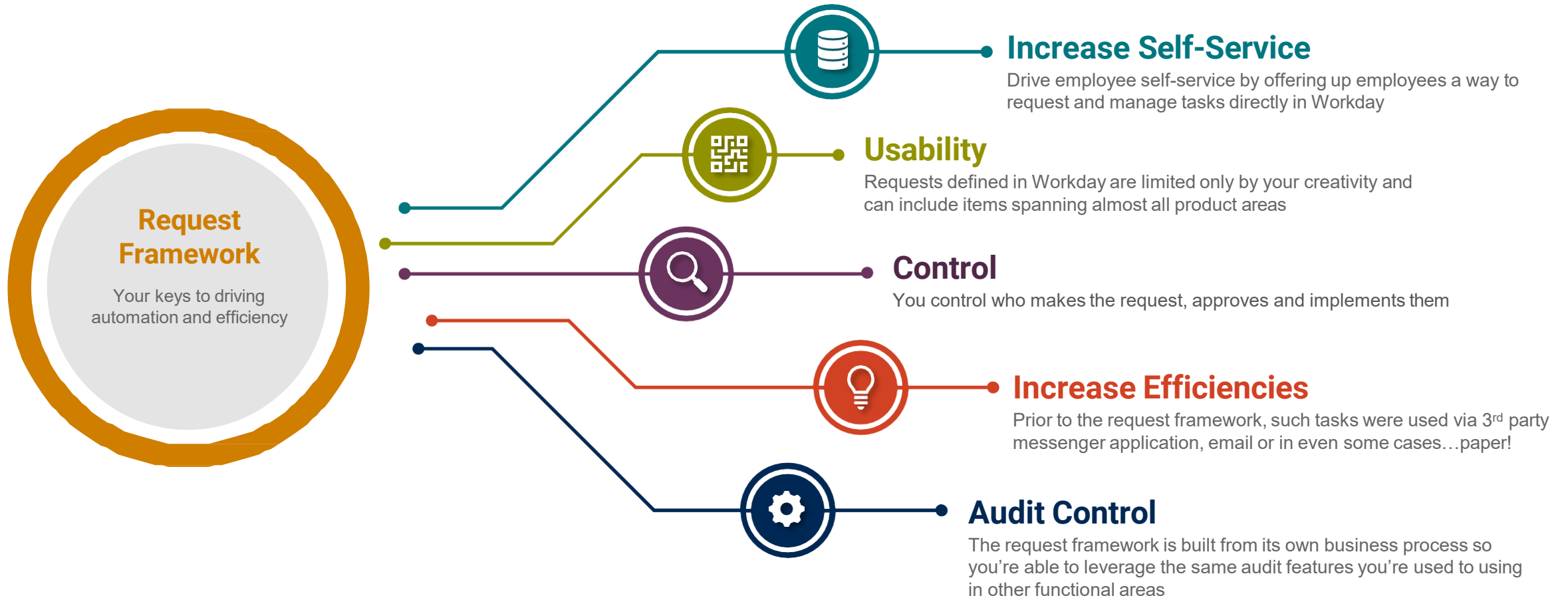
- Dive deeper into Workday Human Capital Management features. Our experts will demonstrate different features in greater detail than may have been discussed throughout your Workday implementation.

Engagement Encouraged!

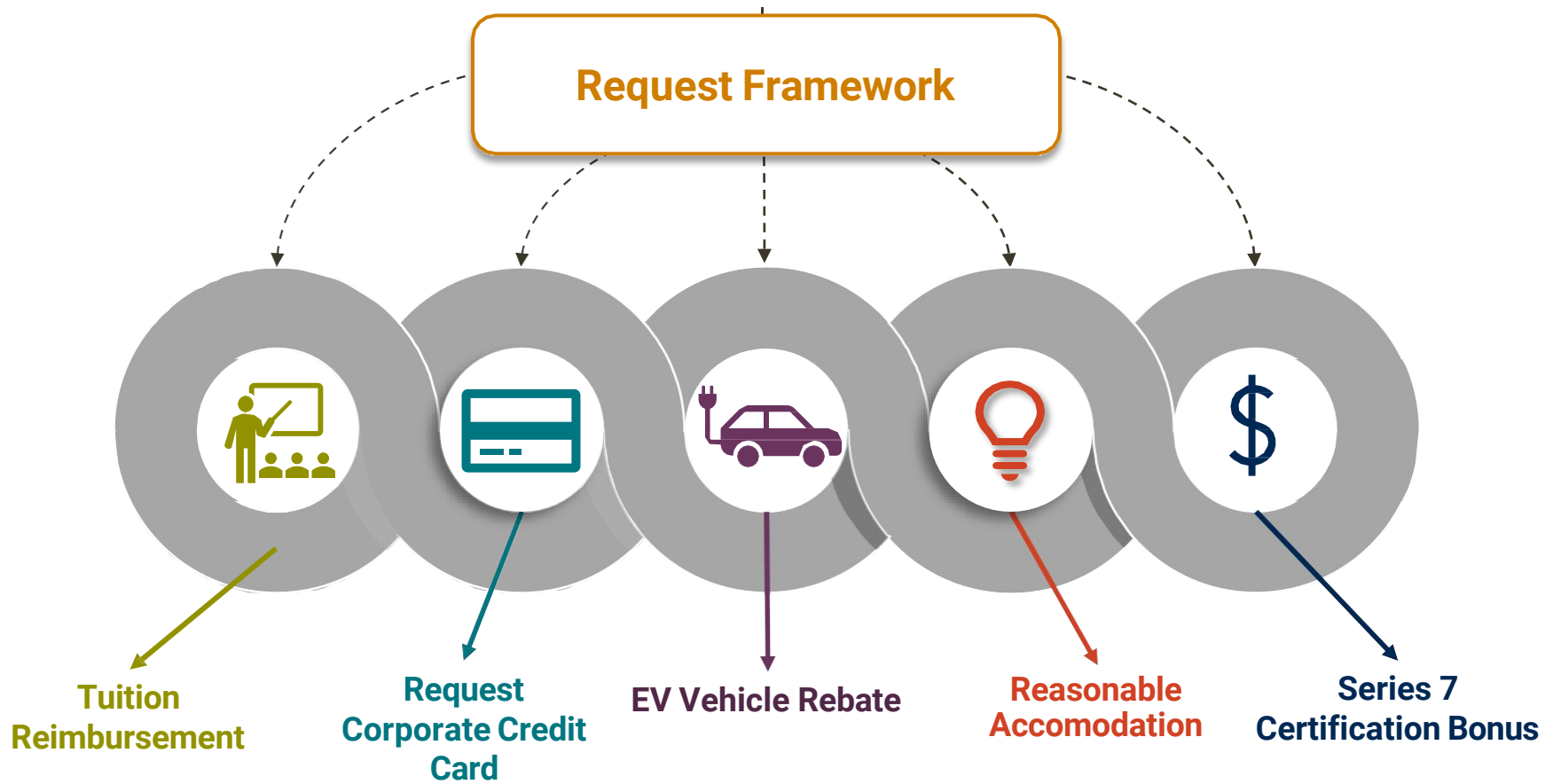


- **Interactive Q&A Sessions:**
Get your specific Workday questions answered live by our experts, ensuring you leave with practical solutions tailored to your needs.
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Request Framework – Conceptual Overview



Request Framework – Use Cases

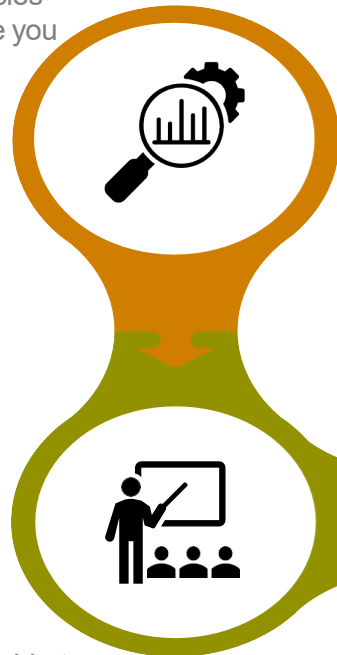


Request Framework – Setup Requirements

1 Configure Domain Security Policies

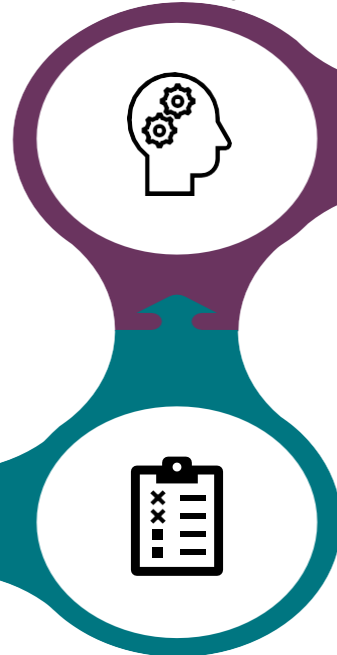
There are several domain policies that need to be enabled before you can leverage the framework.

All domain policies have been added to the appendix



4 Create and Configure Rule Based Business Process Definitions

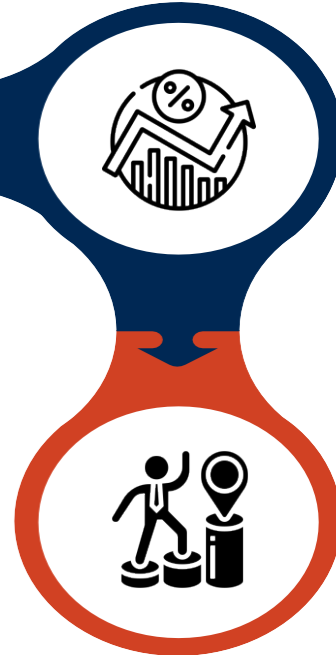
The business process definition will act as your approval structure for requests



5 Security

Security groups are a powerful tool within the request framework as they offer up the ability to constrain access to certain request types

Example – Manager’s and above can only initiate the corporate credit card request type



2 Create Request Type

The request type will be selectable to employees who have access to initiate the request process



3 Create Questionnaire

This is optional however in many uses cases, questionnaires allow you to collect additional information



6 Additional Optional Setup

- Subtypes
- Resolution Details Groups
- Reporting
- BP Validation Rules



Demo

Appendix

Create a Job Based Security Group to Restrict Access to Creating Requests

- Example – Only allow employees who are in the job family of Finance to create initiate the request

Step 1: Create a Job-Based Unconstrained Security Group with Group Criteria set to Job Family = Finance

View Job-Based Security Group (Constrained) Finance Employees X PDF

Security Group Name: Finance Employees

Context Type: Constrained by Organization Access

Group Criteria

- Job Profile
- Job Category
- Job Family: Finance
- Management Level

Access Rights

Apply to Organization Type: Supervisory

Applies to Current Organization Only

Applies to Current Organization And All Subordinates

Business Process Security Policy Permissions 1 item

Operation	Business Process Type	Functional Area
Initiate (Create Request)	Request	System

Step 2: Edit your request type and add the job-based security group to the “initiate” section of the request

Edit Request Type Series 7 Certification Bonus

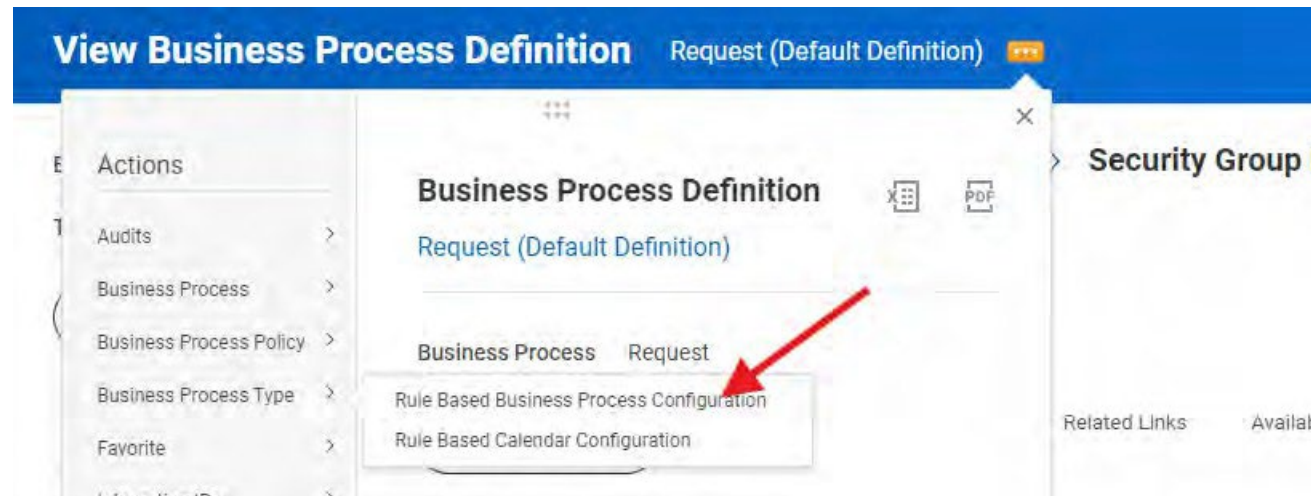
Request Type Name	* Series 7 Certification Bonus
Description	* <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> Format ▼ B <i>I</i> <u>U</u> ▲ ▼ ☰ 🔗 Series 7 Certification Bonus </div>
Workday Object	Worker
Questionnaire	✕ Series 7 Certification 🔗 ☰
Request Description Display	* ✕ Hide ☰
In Use	<input checked="" type="checkbox"/>
Inactive	<input type="checkbox"/>
Allow Request on Behalf of Person	<input type="checkbox"/>
ID Generator	☰

Security Configuration

Initiate	✕ Finance Employees ⋮ ☰
View All	✕ HR Administrator ⋮ ☰
Correct	✕ HR Administrator ⋮ ☰

Step 3 : Create a Rule Based Business Process to Ensure the Correct Business Process is Triggered

From the Related Action from Request default definition > Business Process Type > Rule Based Business Process Configuration



Rule Based Business Process Configuration

Effective Date 08/12/2024

Time Zone * GMT-08:00 Pacific Time (Los Angeles)

Business Process Type Request

12 items

Order	*Rule	*Rule Based Workflow Definition
	Request Type = Series 7 Certification Bonus	Request (Series 7 Certification Bonus Request)

View Condition Rule Request Type = Series 7 Certification Bonus

Description Request Type = Series 7 Certification Bonus

Comment (empty)

Category (empty)

Derived Logic Request Type in the selection list Series 7 Certification Bonus

Rule Conditions Rule Usage

Rule Conditions 1 item

And/Or	(Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
And		<input checked="" type="checkbox"/> Request Type	in the selection list	Value specified in this filter	Series 7 Certification Bonus

Create Calculated Fields to Drive Conditional Logic

- Example – Stop employees from answering “Yes” to both questions within your questionnaire

Step 1: Create a True/False Condition on the Questionnaire Answer Business Object

Calculated Field - True/False Condition CF TF Question is Partially Certified in Series 7

Field Name: CF TF Question is Partially Certified in Series 7

Business Object: Questionnaire Answer

Calculation | Additional Info | Where Used

True/False Condition

1 item

And/Or	{	Field	Operator	Comparison Type	Comparison Value	}
And		<input checked="" type="checkbox"/> Question	in the selection list	Value specified in this filter	Partially Licensed	

Step 2: Create an Extract Single Instance on the Request Business Object

Calculated Field - Extract Single Instance CF ESI Partially Licensed Answer on Request

Field Name	CF ESI Partially Licensed Answer on Request
Business Object	Request

Calculation	Additional Info	Where Used
<div style="background-color: #f9f9f9; padding: 5px;"> <p>Extract Single Instance</p> <p>Source Field Questionnaire Answers</p> <p>Related Business Object Questionnaire Answer</p> <p>Condition CF TF Question is Partially Certified in Series 7</p> <p>Sort Field Any is True</p> <p>Sort Direction (empty)</p> <div style="margin-left: 20px;"> <input checked="" type="radio"/> Ascending (A to Z) <input type="radio"/> Descending (Z to A) </div> <p>Instance to be Returned (empty)</p> <div style="margin-left: 20px;"> <input checked="" type="radio"/> First occurrence <input type="radio"/> Last occurrence <input type="radio"/> Specific occurrence </div> </div>		

Step 3: Create a Lookup Related Value on the Request Business Object

Repeat steps 1-3 for each question within your questionnaire

Calculated Field - Lookup Related Value CF LRV Partially Licensed on Request ⋮

Field Name	CF LRV Partially Licensed on Request
Business Object	Request
Calculation Additional Info Where Used	
Lookup Related Value	
Lookup Field	<input checked="" type="checkbox"/> CF ESI Partially Licensed Answer on Request
Related Business Object	Questionnaire Answer
Return Value	<input checked="" type="checkbox"/> Question Multiple Choice Answer

Step 3: Create a critical condition rule within your request business process and assign the condition rule to step A

View Business Process Definition Request (Series 7 Certification Bonus Request) ⋮

Effective Date: 08/12/2024 > Security Group Restrictions

Time Zone: GMT-08:00 Pacific Time (Los Angeles)

Rule Based Workflow Definition Name: Series 7 Certification Bonus Request

Rule Based Definition: Yes

Most Recent Used Date: 08/12/2024

View Diagram

Business Process Steps Notifications Allowed Actions by Role Allowed Services Related Links Available Rules & Fields

Business Process Steps 3 items 🔍 📄 🗑️

Step	Order	Type	Specify	Optional	Group	All	Run As User	Validation	DL De
Q	a	Initiation		No				Answered Yes to Both Questions (Critical)	
Q	b	Approval		No	Manager				

Rule Conditions 2 items 🔍 📄 🗑️

And/Or	(Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value)
And		<input checked="" type="checkbox"/> CF LRV Partially Licensed on Request	in the selection list	Value specified in this filter	Yes (Partially Licensed)	
And		<input checked="" type="checkbox"/> CF LRV Fully Licensed on Request	in the selection list	Value specified in this filter	Yes (Fully Licensed)	

The following domains should be reviewed/updated as needed before leveraging the request framework:

1. Set up: Requests

- Access to:
 - View request types report
 - Create request type tasks

2. Self Service: Request

- Access to:
 - View request type reports
- Entry to:
 - My Requests report
 - My Recent Requests report

3. Request: View

- Access to:
 - Request type name
 - Request resolution
 - Request description
 - Questionnaire responses

Thank you for
attending

Additional Questions?

Reach out to us at

Experts@armanino.com



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