Workday Departmental Security Roles

Workstream	Security Role	Description	Central Office/Departments or Both
SCM	Cost Center Director	This role is responsible for approving financial transactions based on dollar limit. VUAH, MCJCHV, and other Operating Divisions (MCA): $10k-$50k; Regionals: $10k-$25k	Departmental
FIN	Cost Center Financial Analyst	This role has view access to a specific Cost Center or Cost Center Hierarchy (with no payroll details). If a user has a Company level role i.e.; Accountant, Accounting Manager, Financial Analyst -- they do not need this role	Departmental
FIN	Cost Center Financial Analyst with Payroll Details	This role has view access to a specific Cost Center or Cost Center Hierarchy (including payroll details). If a user has a Company level role i.e.; Accountant, Accounting Manager, Financial Analyst -- they do not need this role	Departmental
SCM	Cost Center Leader	This role is responsible for approving financial transactions between $150k and $500k. This role is applicable to the VUAH MCJCHV and VUMC other operating divisions (MCA etc.)	Departmental
HCM/SCM/ FIN	Cost Center Manager	This role is responsible for approving and managing all financial transactions for a cost center. Financial transactions include payroll costing allocations, purchase requisitions, Pcard and T&E card transactions, and more. Some transactions may require additional approval based on grant, gift or project status or dollar amount. Workday will automatically route financial transactions based on their attributes. Only one approval is necessary if an individual holds multiple approval roles within a transaction's workflow.	Departmental
FIN	Effort Certification Reviewer	This role performs effort certification review function for assigned organizations and includes approval authority for effort certification business process.	Departmental
SCM	Expense Initiator	Ability to initiate expenses on behalf of others in the organization that will route to the subject to review and approve to then route to the next appropriate approvals	Departmental
FIN	Gift Financial Analyst	This role performs financial reporting functions for assigned gifts. Examples include the trial balance, financial statements, and spend analytics. No approval authority.	Departmental

Workday Departmental Security Roles

Workstream	Security Role	Description	Central Office/Departments or Both
FIN	Gift Manager	This role is the primary manager for assigned gifts. Access to gift spend analytics. Responsible for budgeting, variance analysis, purchasing, and sponsor reporting. Approval authority for financial business processes. SCM Approvals: Purchase requisitions, expense reports, and Miscellaneous Payments. Accounting Approvals: Accounting Adjustments	Departmental
FIN	Grant Budget Specialist	This role performs grant budget functions for assigned organizations. Examples include maintaining budgets and amendments. No approval authority.	Departmental
FIN	Grant Financial Analyst	This role performs financial reporting functions for assigned grants. Examples include the trial balance, financial statements, and spend analytics. No approval authority.	Departmental
FIN	Grant Manager	This role is the primary manager for assigned grants. Responsible for budgeting, variance analysis, purchasing, and sponsor reporting Typically assigned to administrative personnel. Access to grant spend analytics. Approval authority for financial business processes. SCM Approvals: Purchase requisitions, purchase order, change orders, expense reports, misc. payments and supplier invoices. HCM Approvals: Effort Certification and Payroll Accounting Adjustments. Accounting Approvals: Accounting Adjustments and Manual JEs. Accounting Submissions: Grant Budgets	Departmental
HCM	HCM Business Assistant with Compensation	Ability to initiate and view HR processes on behalf of manager(s), including compensation processes, and are included on action steps to support inbox actions on behalf of manager(s)	Departmental
HCM	HCM Business Assistant without Compensation	Ability to initiate and view HR processes on behalf of manager(s), excluding compensation processes, and are included on action steps to support inbox actions on behalf of manager(s)	Departmental

Workday Departmental Security Roles

Workstream	Security Role	Description	Central Office/Departments or Both
HCM	HCM Business Manager	Ability to view and approve HR processes on behalf of manager(s). The role is an approving authority as the role is included on manager's review/approval steps to support inbox actions on behalf of manager(s).	Departmental
FIN	Lead Principal Investigator	This role is the primary investigator and approver for assigned grants across one or more awards. Assigned to lead PI for the funded award. Typically assigned to a faculty member. Approval authority for grant award business processes.	Departmental
HCM	Manager Role	The Workday Manager role applies to anyone in the supervisory organization who has one or more positions reporting to them. The Manager security includes a wide range of business processes related to the management of their team including initiation of personnel requisitions, recruitment, hiring, onboarding, performance management, time off approvals, etc. Managers are also the first approvers for some financial transactions such as expense reports, Pcard and T&E card transactions.	Departmental
FIN	Payroll Costing Initiator	This role initiates Payroll Costing Allocations (PCA) and Payroll Accounting Adjustments (PAA)	Departmental
FIN	Principal Investigator (Grant)	This role is assigned on Grant worktag and is the investigator and approver for assigned grants across one or more award lines. Typically assigned to faculty members. Approval authority for grant award business processes.	Departmental
FIN	Project Financial Analyst	This role is the current plant center responsible person + divisional capital approvals / leadership. GL view access to a specific Project or Project Hierarchy	Departmental
FIN	Sponsored Programs Manager (Cost Center)	This role can view grant functions for assigned cost centers. Approval authority for grant award business processes.	Departmental

Workday Departmental Security Roles

Workstream	Security Role	Description	Central Office/Departments or Both
SCM	**VUMC Receiver – Non-Central**	This role is assigned to a position which acknowledges receipt of goods purchased. VUMC Receivers create receipts for all transactions purchased (including services). Vendor payments will not be scheduled until receipt is created by the VUMC Receiver in Workday. Cost Center Managers will be notified if receipt of goods is not created within three days.	Departmental
SCM	**VUMC Requester**	This role assigned to a position which can initiate purchase requisition. Initiates purchase transactions in Workday (similar to eProcurement Creator)	Departmental