

Workday Finance Role Guidance -- UW Tacoma

Updated March 2024

Security role assignments assist with ensuring sufficient internal controls are maintained. Generally, employees can be assigned personas in the following ways:

1. View 2. Initiate 3. View & Initiate 4. Approve

To request new assignments or make changes to existing assignments, a current cost center manager should email tacfiscal@uw.edu the following information:

Employee Name, Position ID, Role Name(s), and Organization Type(s) specific to your school/unit

	Persona	Role Name	Organization Type(s)	Role Description
View		Cost Center Financial Analyst	Cost Center (CC#####) Cost Center Hierarchy (CCH#####)	Perform financial reporting functions. Examples include manager financial reporting and metrics and spend analytics. No approval authority.
		Grant Financial Analyst	Grant (GR#####) Grant Hierarchy (GRH#####)	May not apply to all schools/units. Perform financial reporting functions for grants. Examples include the trial balance, financial statements, and spend analytics. No approval authority.
		Project Financial Analyst	Project (PJ#####) Project Hierarchy (PJH#####)	May not apply to all schools/units. Perform project reporting functions for assigned projects. No approval authority.
		Finance Analyst	Company (UW1861)	View all financial setup and operational data. No approval authority.
Initiate		Expense Data Entry Specialist	Company (UW1861)	Perform expense report data entry functions. Examples include creating expense reports on behalf of other workers and applicants. No approval authority.
		Miscellaneous Payment Data Entry Specialist	Company (UW1861)	Perform Miscellaneous Payment Request data entry functions. No approval authority.
		Requisition Requester (PSC)	Company (UW1861)	Create and maintain requisitions, receipts, and non-PO supplier invoices. Additional view access to Purchase orders, PO Acknowledgements, and Advance Ship Notices. No approval authority.
		Unit Asset Coordinator	Cost Center (CC#####) Cost Center Hierarchy (CCH#####)	May not apply to all schools/units. Responsible for asset maintenance at the unit level. Can issue and transfer assets and report on assets for their respective units. No approval authority.
Approve		Cost Center Manager	Cost Center (CC#####) Cost Center Hierarchy (CCH#####)	Manages a wide variety of budget tasks and responsible for cost center spend. Includes Cost Center Financial Analyst access. Approval authority for financial business processes on non-grant resources.
		Grant Manager	Grant (GR#####) Grant Hierarchy (GRH#####)	May not apply to all schools/units. Primary administrative manager for assigned grants (Not PI). Access to grant spend analytics. Includes Grant Financial Analyst access. Approval authority for financial business processes.
		Project Manager	Project (PJ#####) Project Hierarchy (PJH#####)	May not apply to all schools/units. Primary manager for assigned projects. Access to project spend analytics. Includes Project Financial Analyst access. Approval authority for financial business processes.
		Finance Analyst	Company (UW1861)	View all financial setup and operational data. No approval authority.

AD HOC ASSIGNABLE

	Role Name	Organization Type(s)	Role Description
	Internal Service Delivery Data Entry Specialist	Internal Service Provider (ISP-####)	May not apply to all schools/units. Create, change, and edit internal service delivery for intra-company billings.
	Procurement Data Entry Specialist	Company (UW1861)	Review and approve Procurement Card verifications prior to cost center/grant manager approval. Should be assigned to school/unit administrative staff and supervisors of employees with ProCards.