Accessing Workday Modules and Administrative Information Systems (View Only)

NOTE: The website URL for Workday reference guides that are referenced in this section is: https://confluence.esg.wsu.edu/display/WKB/Workday

OVERVIEW

University departments use modules and functions in the Workday system to conduct various University functions. For security reasons, the University controls access to Workday modules and Functions (see Workday System).

University departments may use the mainframe computer applications in the Administrative Information System (AIS) for view only access to legacy records (prior to January 2021) (see Legacy System).

Workday System

Access to specific Workday modules and functions is assigned based upon work roles performed by an employee. Role-based security assignments are linked to a position. Additional user-based security access may also be assigned to an employee based upon additional tasks which they need to perform that are not covered by their role-based security assignments.

To authorize, remove, or change an employee's access to a Workday module and/or function, departmental personnel complete and route a request to approve or assign security groups or access requests, or a request for security changes in Workday. Completion and routing instructions for these requests are included in the following Workday Security reference guides:

- Security Access Request for Security Partner
- Security Access Request for PII Approver
- Security Access Request for Role Assigner

NOTE: When an employee transfers to another department, the former department must review and remove any user-based security assignments for the employee. (See the Workday reference guides listed above for instructions.)

Legacy System

To authorize, remove, or change an employee's view only access to an AIS application, departmental personnel complete and route an AIS Access Request form. Completion and routing instructions for this form are included under AIS Applications.
Accessing Workday Modules and Administrative Information Systems (View Only)

Legacy System (cont.)

NOTE: When an employee transfers to another department, the former department must:

• Notify the Crimson Service Desk by telephone 509-335-4357, or e-mail crimsonservicedesk@wsu.edu; and

• Submit AIS Access Request forms to remove the employee's access to each previously authorized AIS application.

The employee's new department completes and submits:

• Network Services Account Request form with request for an assigned AIS User ID (see BPPM 85.37); and

• New view only AIS Access Request forms for each AIS application required for the employee's new duties and responsibilities.

The following applications may be accessed for view only by anyone with a valid AIS User ID:

◦ Campus Automobile Reservation System (CARS),

◦ Purchasing/Accounts Payable/Receiving Application (PAPR),

◦ Service Center Billing/Stores Inventory (SCBAIMS),

◦ WSU Organizational Directory (WSUORG).

ITS automatically removes authorizations to all assigned AIS applications, usually within 24 hours of the date an employee separates from University employment.

Additional Requirements

Prior to completing and routing an AIS Access Request, the department must acquire appropriate equipment and software. Information Technology Services (ITS) personnel can assist the department with the purchase of equipment and connection software capable of accessing the University's mainframe computers. Contact Crimson Service Desk for assistance by telephone 509-335-4357, or e-mail crimsonservicedesk@wsu.edu.
## Accessing Workday Modules and Administrative Information Systems (View Only)

| Security | Many Workday modules and functions and AIS applications provide access to sensitive University data. Administrators are to exercise discretion when authorizing employee access to University systems and data. University employees with a demonstrated "need-to-know" may access Workday information. Administrators are responsible for ensuring that authorized employees are aware of data security requirements. See EP37 and BPPM Chapter 87 regarding information security requirements. |
| Release of Data | University employees and administrators are to refer questions regarding release of data in a Workday module or function or an AIS application to the responsible administrative office. Data is released in accordance with regulations in BPPM 90.05, 90.06, and 90.07. (Refer to Table 1 or page two of the AIS Access Request for the responsible administrative office for each application.) |
| Privacy Training | Each employee receiving access to any Workday module/function and/or AIS application that involves student records must complete the online student records privacy training before access is given. To access the online training, select the FERPA Training link on the Registrar's Office Network website at: ronet.wsu.edu/ |
| Documentation | Help and documentation are available in the Workday reference guides for most Workday functions and online on the Registrar's Office Network website for most AIS applications. |
| Training | Training for commonly-used Workday modules and functions is provided by the Modernization Initiative and the responsible administrative office. Training for applicable AIS applications is provided by the responsible administrative office. |
| WORKDAY REQUEST COMPLETION | See the applicable Workday Security reference guides for instructions on requesting and approving role-based security requests for access to Workday modules and functions. |
| AIS ACCESS FORM COMPLETION | Complete a separate AIS Access Request (View Only) form for each employee and for each application. |
Accessing Workday Modules and Administrative Information Systems (View Only)

AIS ACCESS FORM COMPLETION (cont.)

Use the AIS Access Request to obtain or update view only access to those general-use AIS applications discussed in this section and listed on the back of the form. Other more specialized AIS applications may have alternative procedures for view only access.

NOTE: The employee must obtain an AIS User ID prior to sending the AIS Access Request form to the applicable administrators for approval (BPPM 85.37).

The AIS Access Request form is available in PDF format on the PR&F website at:

policies.wsu.edu/prf/index/forms/

Form sections without instructions listed below are considered self-explanatory.

Existing AIS User ID

Refer to BPPM 85.37 for application procedures if the employee does not have a current AIS User ID.

Employee Title / Position Number

Enter the employee's position title and position number.

NOTE: This information is not required for applications to use the BALANCES, BRS, CARS, PAPR, PROPERTY, or SCBAIMS applications.

Add, Delete, Change

Indicate the action desired.

In addition to submitting completed access request forms, the former department must notify the Crimson Service Desk by telephone 509-335-4357, or e-mail crimsonservicedesk@wsu.edu to remove the employee's access to previously authorized AIS applications when any of the following changes occur:

- Employee changes responsibilities
- Employee changes departments
- Hourly employee is terminated

When an employee changes departments, the new department submits access request forms for each AIS application required for the employee's new duties and responsibilities.
### Accessing Workday Modules and Administrative Information Systems (View Only)

<table>
<thead>
<tr>
<th>Add, Delete, Change (cont.)</th>
<th>NOTE: When a full-time employee terminates employment with WSU, ITS automatically removes the employee's authorizations to all AIS applications after the employee's separation date.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application</td>
<td>Enter the name or abbreviation of the desired application. Refer to this section or to the grid on the second page of the form for a list of available applications (see also Table 1). Enter only one application per form.</td>
</tr>
<tr>
<td>Employee's Signature</td>
<td>The employee must read the Appropriate Use Statement and sign the form before access may be authorized.</td>
</tr>
<tr>
<td>Department Chair's Signature</td>
<td>The form must be authorized by an administrator responsible for the areas/departments/units indicated on the form.</td>
</tr>
<tr>
<td>Routing</td>
<td>The department retains a copy and sends the original form to the responsible administrative office. Refer to Table 1 or page two of the form for routing instructions.</td>
</tr>
</tbody>
</table>

The responsible administrative office indicates approval and any access restrictions.

If Information Technology Services (ITS) is involved in processing the request, the responsible administrative office retains a copy and sends the original to ITS. If ITS is not involved in request processing, the responsible administrative office retains the original.

Personnel from the responsible administrative office or ITS process the requested action and notify the departmental contact or employee.

### AIS APPLICATIONS

The following discussion covers the most often accessed AIS applications, and the central administrative office approvals required for those applications, and any additional training requirements. For information regarding AIS applications that are not discussed in this section or Table 1, contact Crimson Service Desk by telephone 509-335-4357, or e-mail crimsonservicedesk@wsu.edu.
## Accessing Workday Modules and Administrative Information Systems (View Only)

<table>
<thead>
<tr>
<th>BALANCES: Account Balances/Detail</th>
<th>Authorized departmental personnel view legacy University financial information systems, i.e., Account Balances/Detail (BALANCES).</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Description</td>
<td>An employee may access several types of reports, depending upon the level of authorized access and the employee's needs.</td>
</tr>
<tr>
<td></td>
<td>Expenditure and revenue reports are available at budget and area levels. The reports may reflect breakdowns by the legacy codes object, subobject, program, subprogram, source, subsource, fund, subfund, or transaction detail.</td>
</tr>
<tr>
<td></td>
<td>Tables of codes used in the University's legacy accounting system are available from this application, e.g., objects, subobjects, sources, subsources. To access Code Tables press the PF key indicated on the main menu.</td>
</tr>
<tr>
<td></td>
<td>Listings of University accounts are available from this application. To access this feature press the PF key indicated on the main menu.</td>
</tr>
<tr>
<td></td>
<td>NOTE: To view a list of the Foundation Data Model values in Workday that correspond to the legacy codes listed in BALANCES, see the Workday OBIEE Crosswalk Report reference guide.</td>
</tr>
<tr>
<td>Routing and Approval</td>
<td>Route a completed and approved AIS Access Request form to the General Accounting Manager in the Controller's Office. Controller's Office personnel verify and approve the request and then route the signed form to Information Technology Services.</td>
</tr>
<tr>
<td>Questions and Training</td>
<td>The Controller's Office personnel are available to answer questions and provide training for these systems.</td>
</tr>
<tr>
<td><strong>BRS: Billing Receivables System</strong></td>
<td>This application contains historical data of charge transactions for clients other than University departments.</td>
</tr>
<tr>
<td>Application Description</td>
<td>The Bursar's Office administers view only access to BRS and associated manual processes. The Bursar's Office is located in French Administration 342.</td>
</tr>
</tbody>
</table>
Accessing Workday Modules and Administrative Information Systems (View Only)

Legal Provisions
The Bursar's Office administers access to student receivables information in conformance with the provisions of the Family Educational Rights and Privacy Act of 1974 (Public Law 93-380) and WAC 504-21. Employees accessing University and student receivable accounts are to be familiar with these provisions.

Routing and Approval
Send the completed and approved AIS Access Request form to the Bursar's Office.

Questions and Training
The Bursar's Office answers questions and provides training to authorized to view transaction records in BRS.

Privacy Training
Each employee receiving access to BRS must complete the online student records privacy training before access is given. To access the online training, select the FERPA Training link on the Registrar's Office Network website at:

ronet.wsu.edu/

CARS: Campus Automobile Reservation System
In the legacy system, departments reserved Motor Pool motor vehicles through the Campus Automobile Reservation System (CARS).

CARS is available to all AIS users for view only purposes. Submit a completed and authorized AIS Access Request to obtain authorization to view legacy vehicle reservations through CARS. Refer to BPPM 95.35 for current information regarding vehicle reservations.

Routing and Approval
Send the completed and approved AIS Access Request form to the Motor Pool.

DEPPS: Departmental Personnel Payroll System
Authorized departmental personnel view legacy employment, positive pay, and departmental payroll information through the Departmental Payroll Processing System (DEPPS).

Application Description
DEPPS provides legacy information regarding:

- Positions and associated assignments.
- Positions and associated appointments.
- Certain employee personal data.
Accessing Workday Modules and Administrative Information Systems (View Only)

Application Description (cont.)

- Employee status data.
- Appointment data.

A limited set of confidential employee personal data elements, e.g., last four-digits of social security number, are available to personnel who have received approval to access such restricted information. NOTE: Personnel with a demonstrated need to access all employee data elements may request access to the Higher Education Personnel Payroll System (HEPPS). See HEPPS.

Special Requirements

University personnel who access employee records should be aware of University and state regulations regarding release of personnel records. Refer to BPPM 90.05 and 90.07.

Justification

If the requesting employee requires access to the restricted employee personal data elements available in DEPPS, include a justification in Comments.

Routing and Approval

The initiating department routes the completed and approved form to the Office of the Vice President for Finance and Administration.

Questions and Training

Direct general questions regarding DEPPS to the Office of Human Resource Services.

HEPPS: Higher Education Personnel Payroll System

Authorized personnel in departments with a demonstrated "need to know" view legacy employment information through HEPPS.

HEPPS access is restricted to employees working in central University offices such as HRS, Payroll Services, and other employees with demonstrated business needs for access to all personnel data.

Application Description

HEPPS provides legacy information regarding:

- Positions and associated assignments.
- Positions and associated appointments.
- All employee personal data.
- Employee status data.
- Appointment data.
Accessing Workday Modules and Administrative Information Systems (View Only)

Special Requirements
University personnel who access employee records should be aware of University and state regulations regarding release of personnel records. Refer to BPPM 90.05 and 90.07.

Justification
Under Comments describe why the indicated employee requires access to all personnel data, including critical data elements such as full social security number.

Routing and Approval
The initiating department routes the completed and approved form to the Office of the Vice President for Finance and Administration.

Questions and Training
Direct general questions regarding HEPPS to the Office of Human Resource Services.

OARS: Official Academic Records System
University employees with a demonstrated "need-to-know" view the legacy Official Academic Records System (OARS) which includes student education, directory, and enrollment records. NOTE: This application contains historical data only. Contact the Registrar's Office regarding access to the system used to process current student academic records.

Application Description
Use OARS to access the following data:

- Any student's directory or registration data.
- Any student's schedule or the class list for any University class.

Special Requirements

Legal Provisions
The Registrar's Office administers access to student records in conformance with the provisions of the Family Educational Rights and Privacy Act of 1974 (Public Law 93-380) and WAC 504-21. For information regarding access to student records see BPPM 90.05 and 90.06.

Justification
Under Comments describe why the indicated employee requires access to student records.

Routing and Approval
Send the completed and approved AIS Access Request to the Registrar's Office.
Accessing Workday Modules and Administrative Information Systems (View Only)

Questions and Training  Contact the Registrar's Office for answers to questions regarding OARS or to schedule training.

Privacy Training  Each employee receiving access to OARS must complete the online student records privacy training before access is given. To access the online training, select the FERPA Training link on the Registrar's Office Network website at: ronet.wsu.edu/

PAPR: Department Order  Departmental personnel view legacy orders for purchases of up to the direct buy limit and place the orders directly with vendors.

Routing and Approval  Route a completed and approved AIS Access Request to Purchasing Services.

Questions and Training  Contact Purchasing Services for answers to questions regarding the legacy Department Order or to schedule training.

PROPERTY: Equipment Inventory  Departmental personnel view legacy unit equipment inventory records by directly accessing the Property AIS application. Refer to BPPM 20.50 for current information regarding property inventory.

Application Description  Departmental personnel access records by location, department, account number, inventory number, item number, or voucher number.

Routing and Approval  Route a completed and approved AIS Access Request to the Property Inventory Section of the Controller's Office.

Questions and Training  Contact the Property Inventory Section of the Controller's Office for answers to questions regarding PROPERTY or to schedule training.

SCBAIMS: University Stores Ordering  Departmental employees may view legacy records of University Stores purchases.

Routing and Approval  Send the completed and approved AIS Access Request to University Stores.

University Stores contacts the requesting employee after processing the request. Allow one week for processing.
## Accessing Workday Modules and Administrative Information Systems (View Only)

### SCBAIMS: Service Center Billing System

Service centers may request view only access to the legacy Service Center Billing System, which provided automated client billing. Refer to *BPPM 30.15* for current information regarding service centers.

**Special Requirements**

Indicate the name of the service center under **Comments**.

**Routing and Approval**

Route a completed and approved AIS Access Request to the Controller's Office.

### SRTS: Student Records Transcript System

University employees with a demonstrated "need-to-know" view the legacy Student Records Transcript System (SRTS) which included complete official academic records for students. **NOTE:** This application contains historical data only. Contact the Registrar's Office regarding access to the system used to process official academic transcripts for current students.

**Application Description**

Use SRTS to access any current student's official academic record.

**Special Requirements**

The Registrar's Office administers access to student records in conformance with the provisions of the Family Educational Rights and Privacy Act of 1974 (Public Law 93-380) and *WAC 504-21*. For information regarding access to student records see *BPPM 90.05* and *90.06*.

**Legal Provisions**

Under **Comments** describe why the indicated employee requires access to student records.

**Routing and Approval**

Send the completed and approved AIS Access Request to the Registrar's Office.

**Questions and Training**

Contact the Registrar's Office for answers to questions regarding SRTS or to schedule training.

**Privacy Training**

Each employee receiving access to SRTS must complete the online student records privacy training before access is given. To access the online training, select the **FERPA Training** link on the Registrar's Office Network website at:

[ronet.wsu.edu/](http://ronet.wsu.edu/)
Accessing Workday Modules and Administrative Information Systems (View Only)

Table 1: AIS Applications

<table>
<thead>
<tr>
<th>Application Name (Application ID)</th>
<th>Available Options and Levels of Access (specify requirements)</th>
<th>Route to Responsible Central Administration Office</th>
<th>Mail Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>BALANCES Account Balances/Detail</td>
<td>The user can view accounting data for indicated areas, departments or units.</td>
<td>Controller's Office, General Accounting</td>
<td>1025</td>
</tr>
<tr>
<td>BRS Billing Receivables System (Historical Data Only)</td>
<td>The user may be authorized for inquiry access only or for update capability as required.</td>
<td>Bursar's Office Note: Privacy training is required. To access training, select the FERPA Training link from the Registrar's Office website at: ronet.wsu.edu/</td>
<td>1039</td>
</tr>
<tr>
<td>CARS Campus Automobile Reservation System</td>
<td>The user can make reservations for indicated departments.</td>
<td>Motor Pool</td>
<td>1075</td>
</tr>
<tr>
<td>DEPPS Departmental Personnel Payroll System</td>
<td>The user may be authorized for inquiry access only. The reason the user requires access must be indicated in Comments. NOTE: For access to accounts for payroll processing, the user must contact Payroll Services separately to request training and approval.</td>
<td>Office of the Vice President for Finance and Administration</td>
<td>1045</td>
</tr>
<tr>
<td>HEPPS Higher Education Personnel Payroll System</td>
<td>The user may be authorized for inquiry access as required. The reason the user requires access must be indicated in Comments. NOTE: For access to accounts for payroll processing, the user must contact Payroll Services separately to request training and approval.</td>
<td>Office of the Vice President for Finance and Administration</td>
<td>1045</td>
</tr>
<tr>
<td>OARS Official Academic Records System (Historical Data Only)</td>
<td>The user may be authorized for inquiry access as required. The reason the user requires access must be indicated in Comments.</td>
<td>Registrar’s Office Note: Privacy training is required. To access training, select the FERPA Training link from the Registrar’s Office website at: ronet.wsu.edu/</td>
<td>1035</td>
</tr>
</tbody>
</table>
# Accessing Workday Modules and Administrative Information Systems (View Only)

Table 1 (cont.)

<table>
<thead>
<tr>
<th>Application Name (Application ID)</th>
<th>Available Options and Levels of Access (specify requirements)</th>
<th>Route to Responsible Central Administration Office</th>
<th>Mail Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAPR Department Order</td>
<td>The user can prepare Department Orders for purchases up to the direct buy limit and place orders directly with suppliers.</td>
<td>Purchasing Services</td>
<td>1020</td>
</tr>
<tr>
<td>PROPERTY Equipment Inventory System</td>
<td>The user may be authorized for inquiry access only or for update capability as required.</td>
<td>Controller's Office, Property Inventory</td>
<td>1025</td>
</tr>
<tr>
<td>SCBAIMS University Stores Ordering</td>
<td>The user may be authorized to order for indicated departments or requisition numbers.</td>
<td>University Stores</td>
<td>1190</td>
</tr>
<tr>
<td>SCBAIMS Service Center Billing</td>
<td>The user can perform miscellaneous IRI billing for indicated service centers.</td>
<td>Controller's Office</td>
<td>1025</td>
</tr>
<tr>
<td>SRTS Student Records Transcript System (Historical Data Only)</td>
<td>The user may be authorized for inquiry access as required. The reason the user requires access must be indicated in Comments.</td>
<td>Registrar's Office Note: Privacy training is required. To access training, select the FERPA Training link from the Registrar’s Office website at: ronet.wsu.edu/</td>
<td>1035</td>
</tr>
</tbody>
</table>