WEBINAR

Mastering Workday: Ask an Expert Series

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

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B
Corporation

WELCOME

Today's Experts

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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.**
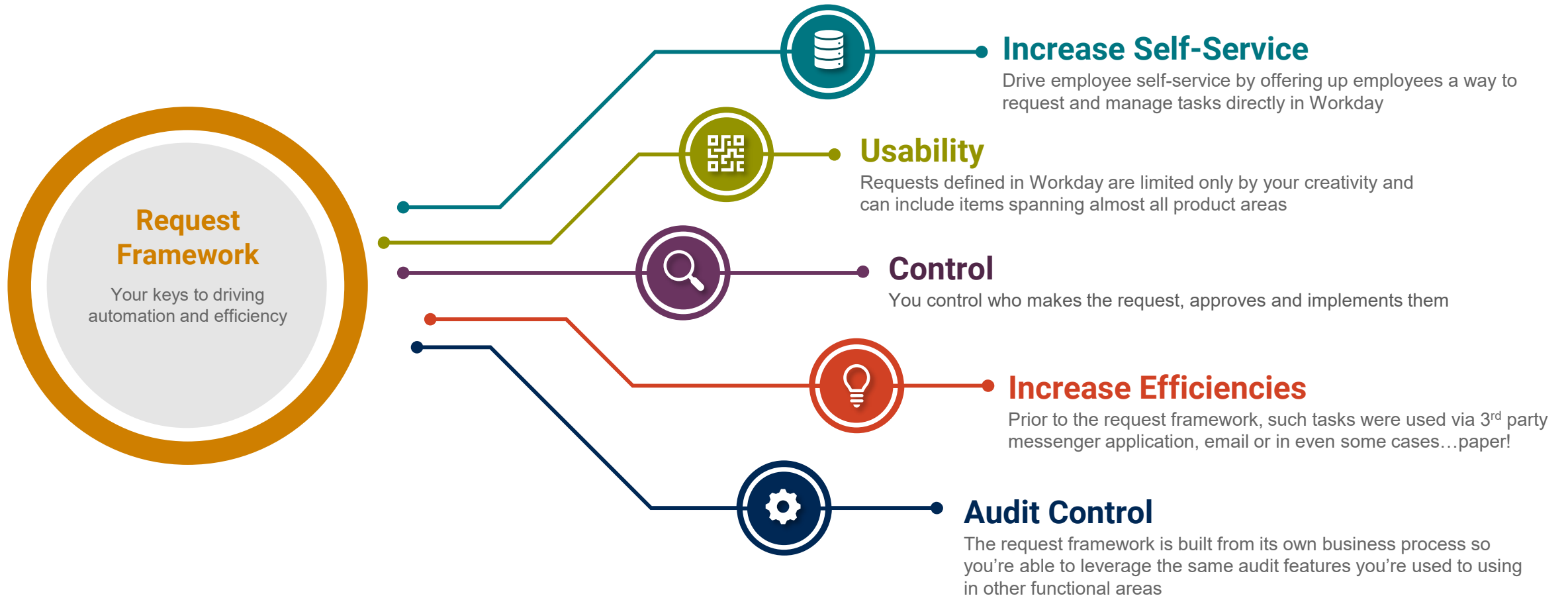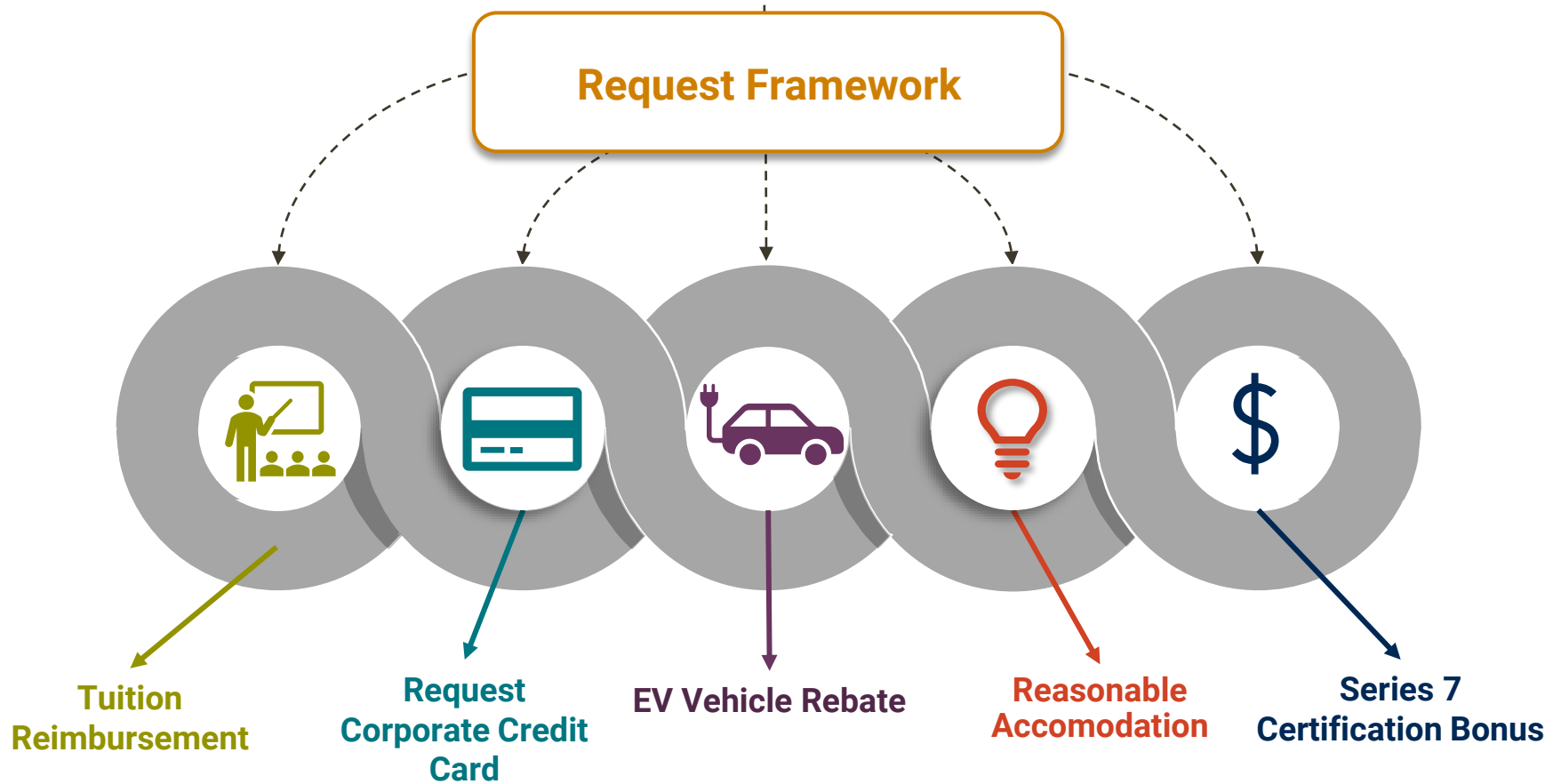
Engagement Encouraged!

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

- **Expert Insights & Tips:** Gain exclusive access to professionals who will share valuable insights, tips, and best practices to enhance your Workday experience.

- **Real-World Case Studies:** Learn from real-world use cases that showcase how other organizations are successfully leveraging Workday to solve common challenges and drive business success.

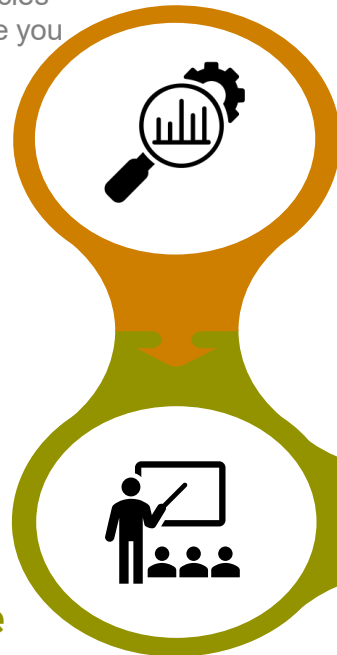# Request Framework – Conceptual Overview

Request Framework Benefits

Request Framework

Your keys to driving automation and efficiency

Increase Self-Service

Drive employee self-service by offering up employees a way to request and manage tasks directly in Workday

Usability

Requests defined in Workday are limited only by your creativity and can include items spanning almost all product areas

Control

You control who makes the request, approves and implements them

Increase Efficiencies

Prior to the request framework, such tasks were used via 3rd party messenger application, email or in even some cases…paper!

Audit Control

The request framework is built from its own business process so you're able to leverage the same audit features you're used to using in other functional areas

Request Framework – Use Cases

Request Framework Use Cases

Request Framework

Tuition Reimbursement

Request Corporate Credit Card

EV Vehicle Rebate

Reasonable Accomodation

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Request Framework – Setup Requirements

Configuration Overview

Configure Domain Security Policies

① 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

Create and Configure Rule Based Business Process Definitions

④ 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
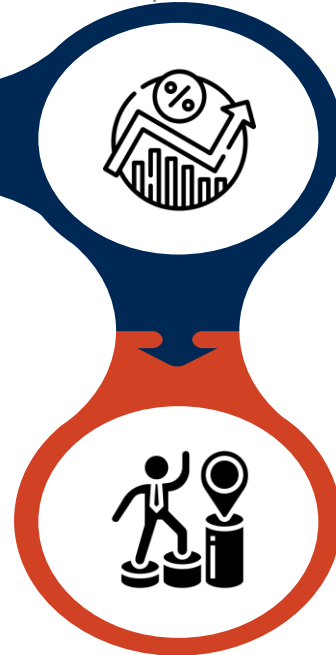
Demo

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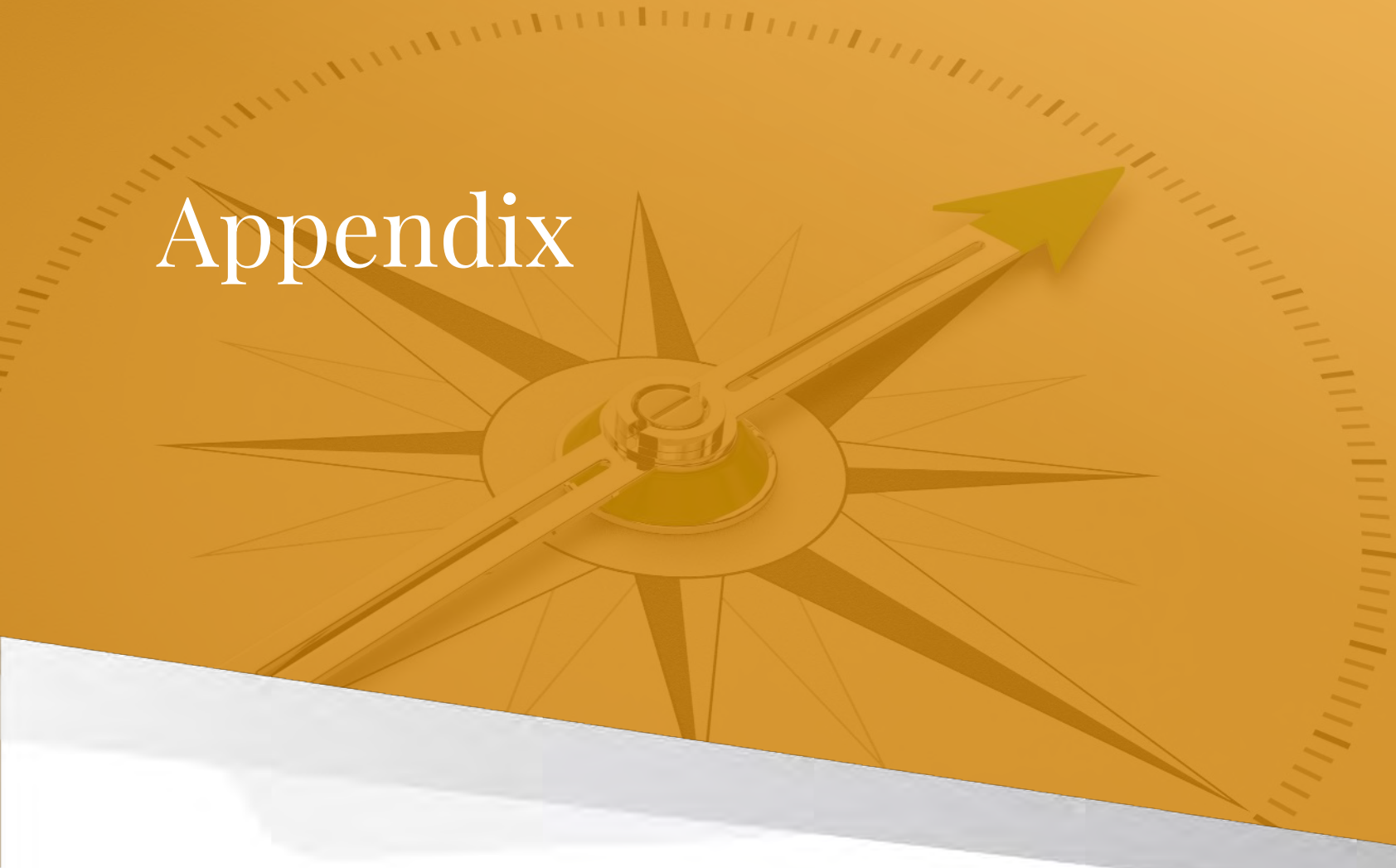
Create a Job Based Security Group to Restrict Access to Creating Requests

- 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

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

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
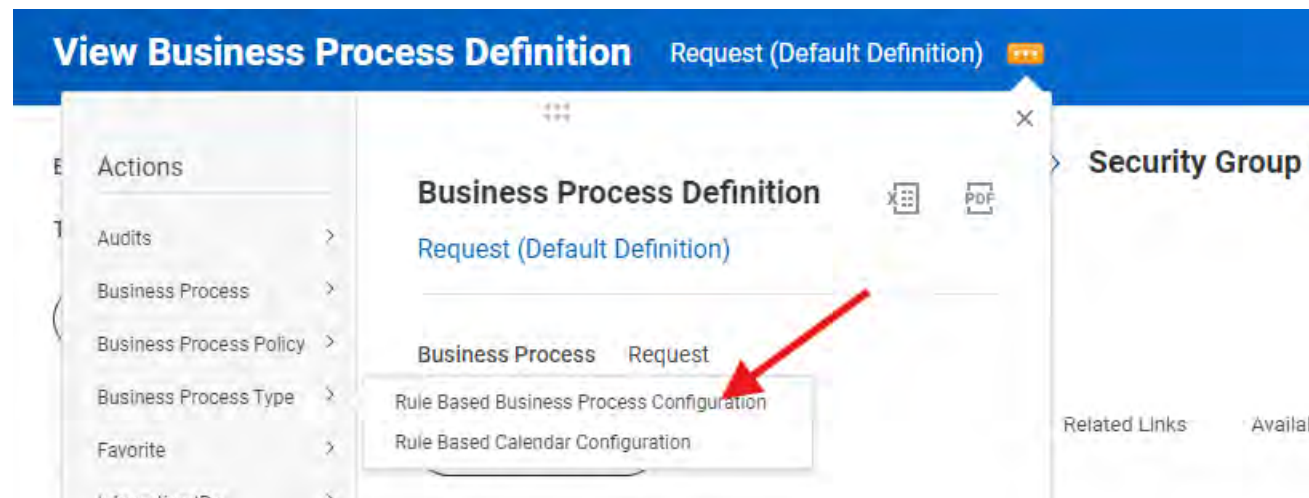
Rule Based Business Process Configuration

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		☑ 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

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

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

Repeat steps 1-3 for each question within your questionnaire

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

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

1. **Set up: Requests**
   o Access to:
     ▪ View request types report
     ▪ Create request type tasks

2. **Self Service: Request**
   o Access to:
     ▪ View request type reports
   o Entry to:
     ▪ My Requests report
     ▪ My Recent Requests report

3. **Request: View**
   o Access to:
     ▪ Request type name
     ▪ Request resolution
     ▪ Request description
     ▪ Questionnaire responses

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Thank you for attending

Additional Questions?

Reach out to us at

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