Use of Proxy Access in Workday

Scope

This policy applies to all Haverford College employees who have been identified as needing access to Proxy capabilities in the test environments of the College's core Enterprise Resource Planning system, Workday.

Policy

Proxy access will only be granted in limited circumstances to employees who are developing, troubleshooting, or testing Workday functionality and can only successfully complete that work if they are able to temporarily access Workday as a different user. Any employee who requires Proxy access will be required to review and sign the [Confidentiality Agreement for Proxy Access in Workday](#).

Procedures

The governance process for using proxy access is as follows:
- The request should include the reason for the request and the length of time necessary to complete the work for which the request is being made. Requests should be sent to the Director of Enterprise Systems* to request temporary access to Proxy capabilities in Workday.
    *If the Director of Enterprise Systems is unavailable and the need is urgent, user should contact the Director of Planning and Project Management.
- The request will be evaluated by IITS and, if appropriate, approved.
- After the request is approved, the user must review and sign the Confidentiality Agreement for Proxy Access, and must review the Rules for Use of Proxy Access in Workday.
- IITS will then provide the user with Proxy access to the Workday Sandbox tenant (or in certain cases as determined by IITS, the Workday Preview tenant). Proxy access will be revoked at the conclusion of the agreed upon timeframe for the specific work being done.
- IITS will maintain a Proxy Log that tracks each proxy request, when granted and when revoked.

Any user approved for Proxy access must abide by the following Rules for Use of Proxy Access in Workday:

Appropriate Uses of Proxy Access

- Testing
  - Proxy in testing is used so that a single user can execute a use case or test scenario from start to finish without having to wait for others, thus reducing testing cycle time dramatically. It also enables developers/testers to fully test their projects before involving other users.
- Troubleshooting
  - Proxy can be used to help resolve an end user's issue or unexplained Workday behavior. If an end user claims they are unable to perform a task or are not seeing something they should, a troubleshooter with proxy access can proxy as the user in Sandbox to try to replicate the situation. Similarly, if an action was taken that produced results that do not make sense or seems to be incorrect, proxying allows the troubleshooter to further investigate the behavior.
- Checking role capabilities
  - Proxy can be used to see if a user has the correct role to perform a task or capability that the user requires.

Inappropriate Uses of Proxy Access

- Viewing or Distributing Restricted Data
  - Proxy is not intended to allow the proxy user to gain access to data they do not otherwise have access to in their current Workday roles.
  - Proxy is not intended to enable the proxy user to run Reports that they otherwise would not have access to in Production. If a user requires access to a report or a subset of data from a report, they should contact IITS with a request for access and the justification for that access.
  - Proxy should never be used to distribute any data. **Data in Sandbox and Preview is non-production and should never be distributed** under any circumstances. If the user has a valid need for data they cannot access, they should request the Production report results from the appropriate business user, i.e. a person who is the custodian of the requested data.
- Granting Permissions to Self or Others
  - Proxy is not intended to allow the proxy user to act as a user to grant additional permissions to oneself or others. All proxy access must follow the review and approvals outlined above.

Definitions

- Proxy Access: Workday functionality within a test system environment which enables a user to see and act in Workday as if they are another user.

- Workday Sandbox Tenant: This is a copy of our Workday system that can be used for testing and troubleshooting purposes.   It is copied from Production every Friday night so it is an exact copy of our Production system every Saturday morning.
- Workday Preview Tenant: This is a copy of our Workday system that is used for testing of longer term projects.   It is not copied from Production on a regular basis, but only when needed in preparation for a particular enhancement project.

References, Related Resources, or Appendices

- [Confidentiality Agreement for Proxy Access](#)
- Rules for Use of Proxy Access in Workday
- [Data Confidentiality Agreement](#)

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Contact the Sponsor with any questions.