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Workday Finance, configured by a Chartered Accountant.

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■ WORKDAY FINANCE · STEP BY STEP

Create Requesting Entity

■ Table of Contents

- Prerequisites
- Create Requesting Entity Task
- Optional: Configure Restricted Purchase Items
- Optional: Define Security Segments for Requesting Entities
- Common Errors and Resolutions
- Best Practices

■ Purpose

This guide provides step-by-step instructions for creating a Requesting Entity. This process ensures that the right items are available to users during requisition creation, improving procurement efficiency.

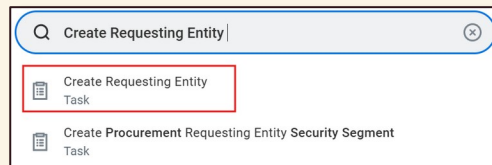
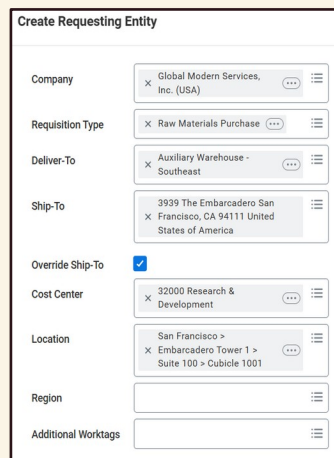
■ Prerequisites

Before creating a Requesting Entity, ensure the following:

- You have the appropriate Workday Security Role (e.g., Finance Administrator and Security Configurator)
- You have required information:
 - Company
 - Requisition Type
 - Addresses
 - Cost Center

■ Create Requesting Entity Task

- Search Create Requesting Entity using the Workday search bar and click on the resulting Create Requesting Entity task.
- Configure the following fields as desired:
 - Company
 - Requisition Type
 - Deliver-To
 - Ship-To
 - Override Ship-To
 - Cost Center
 - Additional Worktags



 A screenshot of the "Create Requesting Entity" form. The fields are filled out as follows:

- Company: Global Modern Services, Inc. (USA)
- Requisition Type: Raw Materials Purchase
- Deliver-To: Auxiliary Warehouse - Southeast
- Ship-To: 3939 The Embarcadero San Francisco, CA 94111 United States of America
- Override Ship-To: ☒
- Cost Center: 32000 Research & Development
- Location: San Francisco > Embarcadero Tower 1 > Suite 100 > Cubicle 1001
- Region: (empty)
- Additional Worktags: (empty)

■ Optional: Configure Restricted Purchase Items

- Add a Restricted Purchased Items List or individual purchase items to be restricted to only this requesting entity.

Create Requesting Entity

Name *

Example1

Inactive

☐

Defaults

Purchase Items

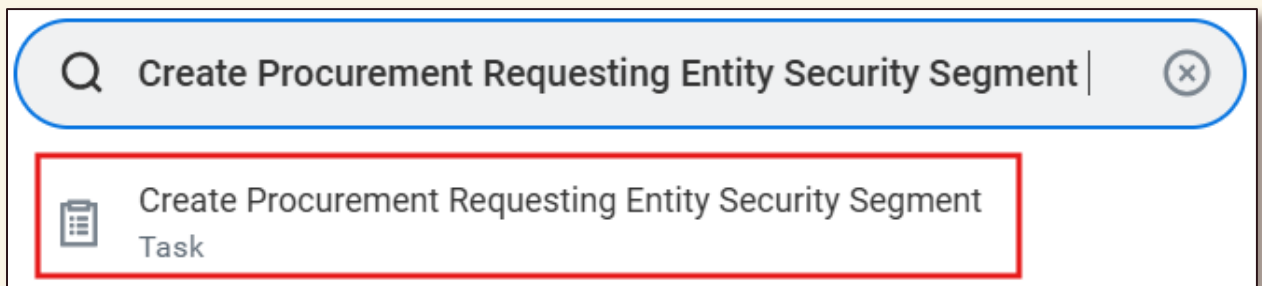
Restricted Purchase Item Lists

2 items

+	Restricted Purchase Items
−	× 10" STEAM Engine Locomotive Die-Cast Pull Back 6pc/Disp ...
−	× 1.5" Rainbow Gyroscope Sphere ...

■ Optional: Define Security Segments for Requesting Entities

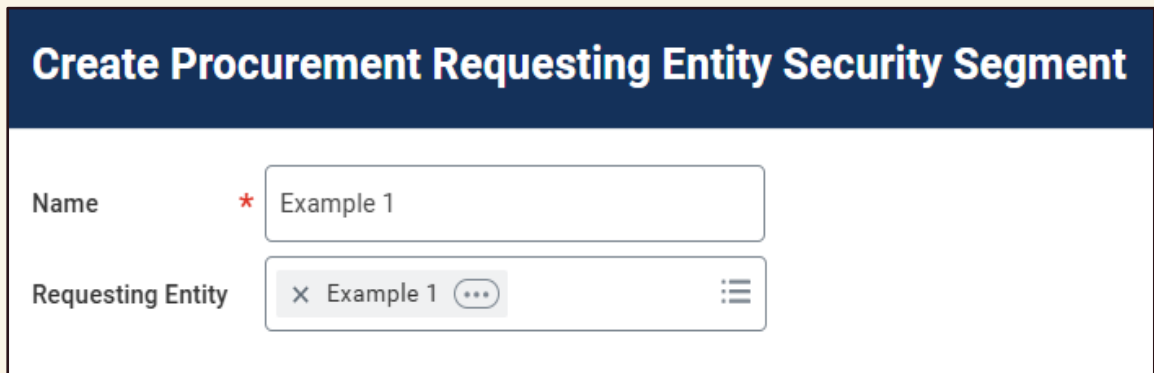
- Access Create Procurement Requesting Entity Security Segment and click on the resulting Create Procurement Requesting Entity Security Segment task



Search bar: Create Procurement Requesting Entity Security Segment | (X)

Result: Create Procurement Requesting Entity Security Segment Task

- Enter a Name and a Requesting Entity



Create Procurement Requesting Entity Security Segment

Name * Example 1

Requesting Entity X Example 1 ...

■ Optional: Define Security Segments for Requesting Entities

- Assign segment security groups to the Procurement Requesting Entity Security Segment you just created.
- Search for the Access Procurement Requesting Entity (Segmented) security domain.

 Domain Security Configuration Report

Domain Security Configuration

[View Report Definition](#)

Functional Areas

Domain

Access Procurement Requesting Entity (Segmented)

Cancel

OK

■ Optional: Define Security Segments for Requesting Entities

- Click on the related actions, hover over Domain, click on Edit Security Policy

Domain	Super Domain	Configurable
Access Procurement Requesting Entity (Segmented) 		Yes

Actions

- Domain >
- Audits >
- Favorite >
- Integration IDs >
- Reporting >

Domain

- Edit Security Policy Permissions**
- View Security Policy

Name

Description

■ Optional: Define Security Segments for Requesting Entities

- Add security groups to the Access Procurement Requesting Entity (Segmented) security segment and determine access (view, modify, or both)

Edit Domain Security Policy Permissions
Access Procurement Requesting Entity (Segmented)

Description
This domain controls access to requesting entities for Purchase Item Requests. Requesting entities must be grouped into Segments and assigned to the security groups authorized to access them in a Seg...

Status
Active

Functional Areas
Procurement

Allowed Security Group Types
Public Groups
Segment - Requisition
Unconstrained Groups

Notes

Securable Actions 5

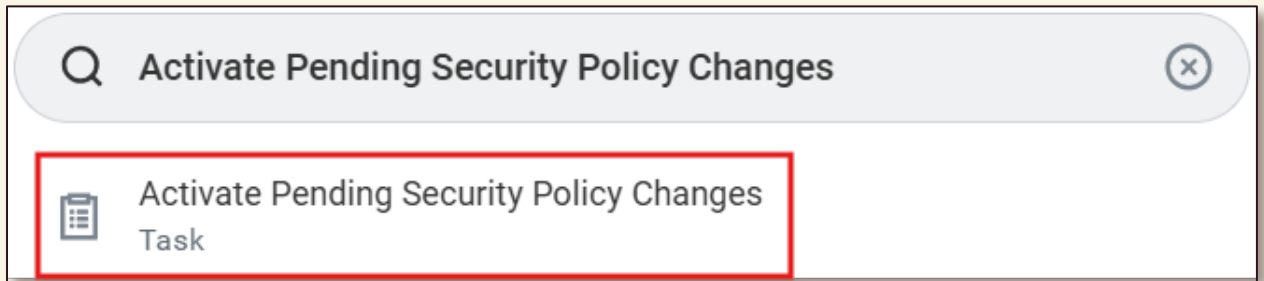
Errors and Alerts Found

Report/Task Permissions 2 Items

	*Security Groups	View	Modify
⊖	X Requesting Entities, Buyers	☒	☒
⊖	X Implementers	☒	☒

■ Optional: Define Security Segments for Requesting Entities

- Activate pending security policy changes using the Activate Pending Security Policy Changes task.



■ Optional: Define Security Segments for Requesting Entities

➤ Confirm the activation

Activate Pending Security Policy Changes

Enter a comment to describe the security changes to be published. On the following screen you will be asked to review and confirm the changes that will take effect.

Current Security Evaluation Moment

06/24/2025 07:54:02.916 AM

Comment

★ test

Proposed Security Evaluation Moment

06/25/2025 04:12:09.956 PM

Comment

★

Testing

All pending security policy changes will become effective. Please review the data below and click Confirm if you want to proceed.

Current Security Evaluation Moment

06/24/2025 07:54:02.916 AM

Proposed Security Evaluation Moment

06/25/2025 04:12:09.956 PM

Comment

Testing

Confirm

★ ☒

Domain Security Policies

1 item

Domain Security Policy	Last Changed
Access Procurement Requesting Entity (Segmented)	06/25/2025 04:11:04.668 PM

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12 SWIPE ➔

■ Common Errors and Resolutions

Issue	Description	Resolution
Security is not being updated.	You may have edited the domain security, but the changes are not in effect.	Be sure to activate the pending security policy changes.
Only able to view the item.	View security is for “Viewing” the item and “Modify” is making edits.	Refer to the Domain Security Policy Permissions slide to configure “View” and “Modify” access.

■ Best Practices

- Use clear and consistent naming conventions.
- Proxy as uses in your Sandbox or Preview Tenant to check your new security.
- Test your Requesting Entities in your Sandbox or Preview Tenant before making changes in Production.



Thank You

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Workday Finance, configured by a Chartered Accountant.

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