

Delegation Set Up for the HEP group

This should take 10 minutes or less to complete

Log into Workday

Copy the following link:

<https://wd5.myworkday.com/rochester/d/home.html>

Choose University of Rochester and login with your credentials



Type My Delegations in the search box in Workday and hit enter

Select My Delegations

→ **My Delegations**
Report
View Current Delegations with a button to request Delegation History, Delegated Tasks, and Business to monitor and manage your delegated tasks.

View My Delegation Assignments
Report
View all your delegation assignments, the delegation rules. Enables you to keep track of your Optional prompt: none

Select the **Manage Delegations** button in the lower left

My Delegations

For **Laura Scuderi**

Current Delegations Current Task

0 items

Begin Date

→ **Manage Delegations**

Enter:

Begin Date: today's date

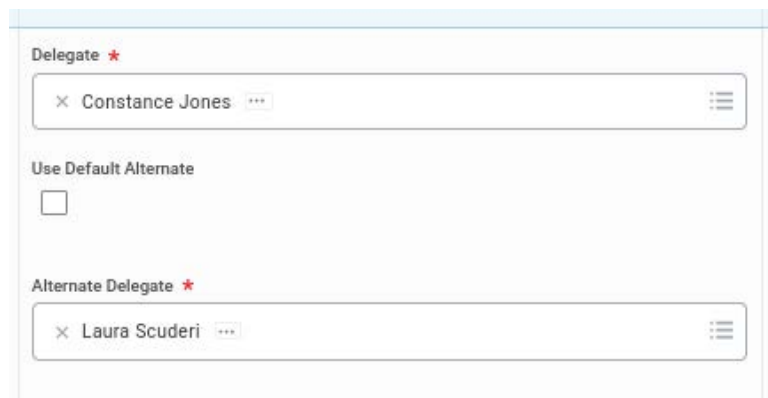
End Date 1/31/2024

Note: Delegations require a specific date range and cannot be set for more than one year.

	*Begin Date	End Date
+		
-	MM/DD/YYYY	01/31/2024

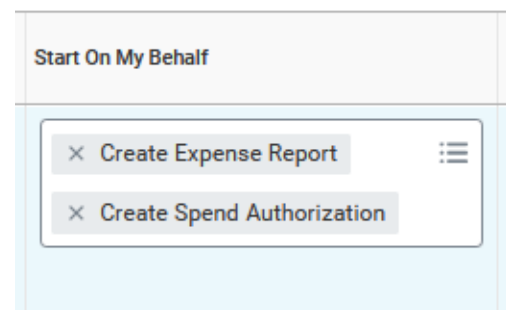
Follow these steps to enter the first delegate:

- * In the delegate box type **Constance Jones** and hit enter, then tab
- * Uncheck the box Use Default Alternate
- * Click on the x next to Kevin McFarland to remove him
- * In the alternate delegate box type **Laura Scuderi** and hit enter, then tab
- * Check that your entries match the example



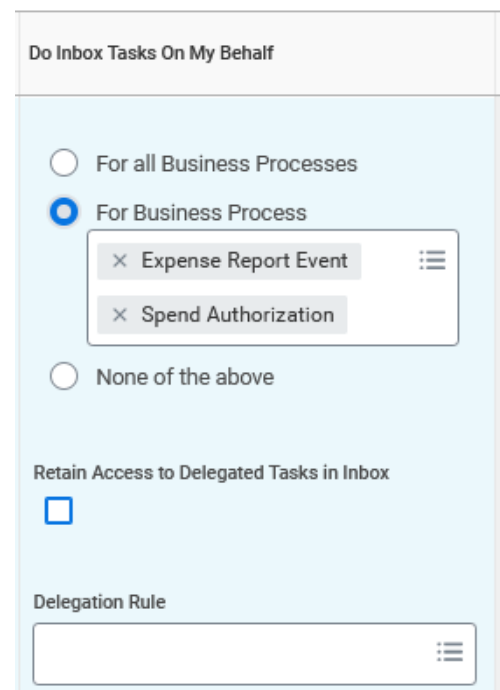
The screenshot shows a 'Delegate' configuration window. At the top, there's a 'Delegate' label with a red star. Below it is a text input field containing 'Constance Jones' with a small 'x' icon on the left and a menu icon on the right. Underneath is a checkbox labeled 'Use Default Alternate' which is currently unchecked. Below that is an 'Alternate Delegate' label with a red star, followed by another text input field containing 'Laura Scuderi' with similar 'x' and menu icons.

-
- * In box under **Start on My Behalf** box type **Create** and hit enter
 - * Two results should be found. Check both of the boxes: Create expense report and Create spend authorization
 - * Check that your entries match the example



The screenshot shows a 'Start On My Behalf' configuration window. It has a title bar 'Start On My Behalf'. Below the title bar is a list box containing two items: 'Create Expense Report' and 'Create Spend Authorization'. Each item has a small 'x' icon on the left and a menu icon on the right.

-
- * In the box under **Do Inbox Tasks on my Behalf** click the choice **For Business Process**
 - * In the For Business Process box type **Expense Report Event** and hit enter
 - * In the For Business Process box where it says Search type **Spend Authorization**, hit enter and click the box next to Spend Authorization, then hit tab (if you don't see the search box click on the 3 lines in the box to see it)
 - * Uncheck Retain Access to Delegated Tasks in Inbox **
 - * Check that your entries match the example



The screenshot shows a 'Do Inbox Tasks On My Behalf' configuration window. It has a title bar 'Do Inbox Tasks On My Behalf'. Below the title bar are three radio button options: 'For all Business Processes', 'For Business Process' (which is selected), and 'None of the above'. Under the 'For Business Process' option is a list box containing two items: 'Expense Report Event' and 'Spend Authorization'. Each item has a small 'x' icon on the left and a menu icon on the right. Below the list box is a checkbox labeled 'Retain Access to Delegated Tasks in Inbox' which is currently unchecked. At the bottom is a 'Delegation Rule' label followed by a text input field with a menu icon on the right.

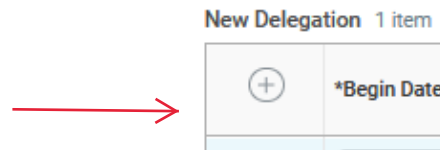
** If you leave this checked you will receive notifications for every expense report we initiate and all approvals being made on behalf of you. You, Connie and Laura will receive notifications to approve expense reports. This could cause some confusion because our process is that Connie and Laura approve them. If you decide to check this box please remember to not approve and only view the tasks. We recommend you uncheck it. You will still have access to see your expense reports in workday.

Follow these steps to enter the second delegate:

* Click on the plus sign on the left side of the screen to add another delegation row

* The new row will be **above** the row you just entered

* You will now repeat all the steps that you did for Connie's delegation for Laura



New Delegation 1 item

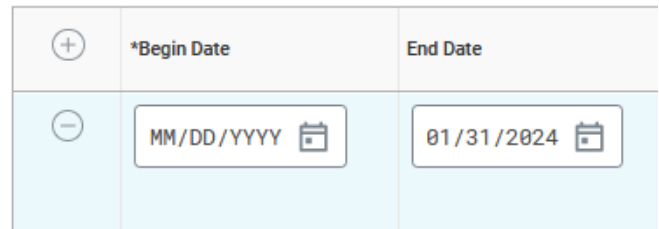
+	*Begin Date
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Enter:

Begin Date: today's date

End Date 1/31/2024

Note: Delegations require a specific date range and cannot be set for more than one year.



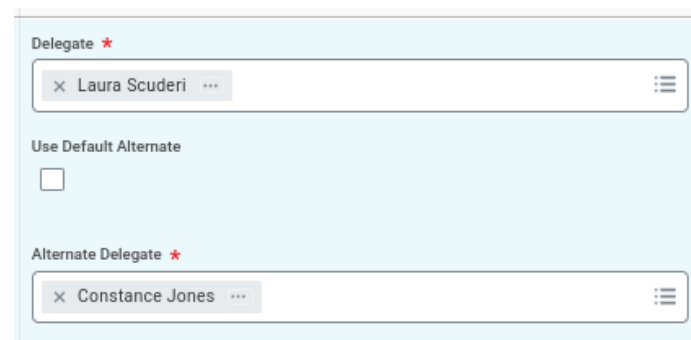
+	*Begin Date	End Date
-	MM/DD/YYYY	01/31/2024

* In the delegate box type **Laura Scuderi** and hit enter, then tab

* The box Use Default Alternate should already be unchecked, if not uncheck it

* In the alternate delegate box type **Constance Jones** and hit enter, then tab

* Check that your entries match the example



Delegate *

x Laura Scuderi ...

Use Default Alternate

☐

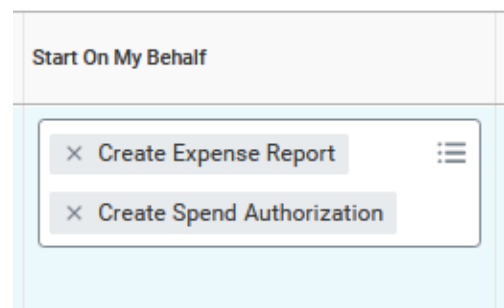
Alternate Delegate *

x Constance Jones ...

* In box under **Start on My Behalf** box type **Create** and hit enter

* Two results should be found. Check both of the boxes: Create expense report and Create spend authorization

* Check that your entries match the example



Start On My Behalf

x Create Expense Report ...

x Create Spend Authorization ...

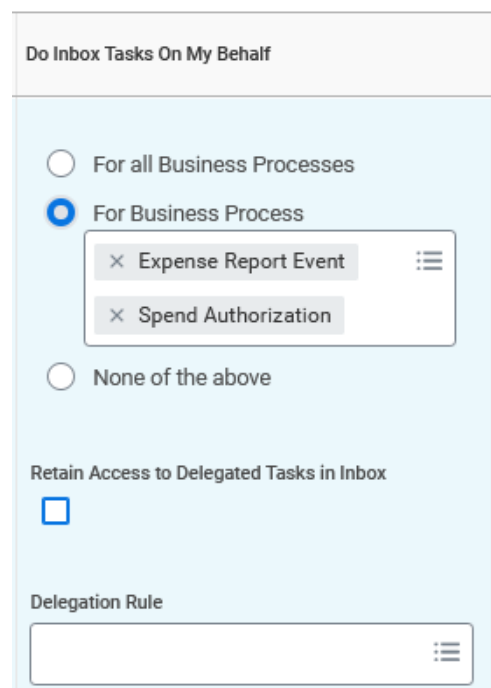
* In the box under **Do Inbox Tasks on My Behalf** click the choice For Business Process

* In the For Business Process box type **Expense Report Event** and hit enter

* In the For Business Process box where it says Search type Spend Authorization, hit enter and click the box next to Spend Authorization, then hit tab (if you don't see the search box click on the 3 lines in the box to see it)

* The box Uncheck Retain Access to Delegated Tasks in Inbox should already be unchecked, if not uncheck it

* Check that your entries match the example



Your Delegation entries should look like this

> Business Processes allowed for Delegation

New Delegation: 2 items					
	*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
⊖	02/22/2023	01/31/2024	<div>Delegate ✖ Laura Scuderi</div> <div>Use Default Alternate <input type="checkbox"/></div> <div>Alternate Delegate ✖ Constance Jones</div>	<div>Create Expense Report</div> <div>Create Spend Authorization</div>	<div><input type="radio"/> For all Business Processes</div> <div><input checked="" type="radio"/> For Business Process <div>Expense Report Event</div><div>Spend Authorization</div></div> <div><input type="radio"/> None of the above</div> <div>Retain Access to Delegated Tasks in Inbox <input type="checkbox"/></div> <div>Delegation Rule</div>
⊖	02/22/2023	01/31/2024	<div>Delegate ✖ Constance Jones</div> <div>Use Default Alternate <input type="checkbox"/></div> <div>Alternate Delegate ✖ Laura Scuderi</div>	<div>Create Expense Report</div> <div>Create Spend Authorization</div>	<div><input type="radio"/> For all Business Processes</div> <div><input checked="" type="radio"/> For Business Process <div>Expense Report Event</div><div>Spend Authorization</div></div> <div><input type="radio"/> None of the above</div> <div>Retain Access to Delegated Tasks in Inbox <input type="checkbox"/></div> <div>Delegation Rule</div>

Click Submit at the bottom of the screen

Submit

Save for Later

Cancel

You will see this alert pop up. That's ok, hit Submit again This means your delegate will be able to see any expense reports submitted in workday. They will not see other information.

Alert

1. New Delegation (Row 1)

When you delegate the creation of an item, you give the delegate access to all of your previously created items of that type.

You are now all set up for Connie and Laura to initiate and approve expense reports on your behalf in the Workday Expense system. If you go to the my delegations page you should now see these delegations. For instructions on how to submit an expense report please see the instructions on the website at <https://www.sas.wdev.rochester.edu/pas/about/departments-links.html>

Why you are setting up these delegations:

After reviewing the new workday expense system, testing it and talking to other departments we determined the system is not user friendly enough to have employees enter their own expense reports. There are many nuances to the system. For accuracy and consistency the department staff will be responsible for entering into workday. Because you and your supervisor will have reviewed and approved the Business Expense Reimbursement Form there is no need for you to approve again when the reimbursement is entered in workday, this is why we have asked everyone to delegate the initiation and approval of the expense reports.

Delegation approvals:

- * When a graduate student, postdoc or scientist submits their delegations the PI that is their supervisor will receive a request to approve the delegations.
- * When a PI submits their delegations the chair will received a request to approve the delegations.
- * When a staff member submits their delegations their supervisor will received a request to approve the delegations.