Authorization Request Application
User Guide
Table of Content

Quick Start Examples:

- Finance
- Procurement
- Student

User Manual

- How to view request status
Example: Financials Reporting

- Select Service: UR Financials (Common Roles)
- Click the Plus and select the FAO organization type you need access to (Cost Center, Grant, UR Gift, etc.)
- Enter Organization for which you are requesting authorization
- Request the Analyst* role available in the drop down

*Note: Analyst roles are segmented by the Organization type you select.
Example: Grants use the Grants Financials Analyst role, Cost Centers use Cost Center Financial Analyst role. Custom Organizations like UR Gift use UR FAO Analyst role
Example: Request P2P initiator

• Select Service: UR Procurement (Common Roles)
• Click the Plus and select the FAO organization type you need access to (Cost Center, Grant, UR Gift, etc.)
• Enter Organization for which you are requesting authorization
• Request Role: Organization Requisitioner
• Click the Plus again and select Organization Type: Company
• Enter the Company associated with the FAO in the Organization field
• Request Role: Organization Requisition Initiator
• Repeat steps 5-7 for all Companies associated with the Organization.

• *Note: If you are uncertain which Companies are associated with an FAO:
  • Navigate to the Organization, click the related Action, click Company, and select Companies for Cost Center
  • OR, Run report: View Company for Cost Center for the target Cost Center or Cost Center Hierarchy.
Example: Request Student Records View Only

- Select Service: UR Student (Common Roles)
- Click the Plus and select the Academic Unit or Academic Unit Level under the organization type
- Enter Academic Unit or Academic Unit Level in the Organization field you are requesting authorization
- Request Role: Student Records View Only
Accessing the Authorization Request App

- Once logged in to your Workday tenant – navigate to the top left screen and click the Menu button.
- At the bottom of the Menu, underneath the External Links grouping, click on the Authorization Request Application
- Alternatively: Search “Authorization Request Application”
There are three pages you can access:

1. **Initiate Authorization Request**
   - This page allows you to initiate an Authorization Request on behalf of yourself or someone else.

2. **My Authorization Requests**
   - This page allows you to check on the status of Authorization Requests that you initiated for yourself, someone else, or request others initiated on behalf of you.

3. **Role Descriptions**
   - This page allows you to see services, their related roles and descriptions to better help you self service when uncertain what change to request.

*Note if you ever have questions please work with your manager, service contact, or contact the UnivIT HelpDesk.*
To initiate an Authorization Request, populate the following fields:

- **Select Worker**
  - This is the target worker of the request – or the worker who’s security access will be affected. It defaults to the logged in user. The Employee ID of the worker will be populated to validate the correct worker was chosen.

- **Select Position**
  - If a worker has multiple positions, you must select one position for the security request to be performed upon.

- **Request Summary**
  - A descriptive Summary for the request, so that you and others may easily find it later.

- **Request Justification**
  - An explanation of the request to provide justification related to the request.

- **Select Services**
  - The Workday services that control the access desired must be selected. Multiple services can be selected. One request will be generated for each service selected.
Request Detail Page(s)
Request Detail Page

For each service you select on the initial request page, a Request Detail Page will be generated after you hit OK.

Navigate between the Request Detail Pages by:
- Using the Menu on the left side of the screen
- Or by using the Next and Back buttons at the bottom of the screen.
For each Request Detail Page, there will be two sections:

- **Add Role Requests** – this section allows the request of access the worker does not currently hold.
- **Remove Role Requests** – this section allows the request of removal of access the worker currently has. If the request is made by someone other than the worker, this request must be approved by the worker.
Add Role Request

Three fields must be populated for each Add Role request made:

- **Organization Type**
  This is the type of organization the worker is requesting access to (Company, Supervisory, Academic Unit, etc.)

- **Organization**
  This is the actual organization’s data that the worker is requesting access to.

- **Requested Role**
  This is the type of access the user is requesting. These roles are established by the security team. Descriptions for roles will be viewable by users via Report.
• To request the removal of a role for the worker, simply check the box next to that role. If the request is being made by someone other than the worker, the worker will be sent an approval step in the business process.
Once all Request Detail pages are completed, the user will be brought to a Request Review page.

Here the user can review the request, and use the Back button to modify any details.

Select OK to submit the request!
### Approval Steps

- **Review Role Addition Request**
  - **Service**: UR Procurement
  - **Worker**: Scott Flaherty
  - **Position**: UR,20171133, SF, Financial Analyst - Scott Flaherty
  - **Request ID**: REQ_58
  - **Request Name**: test 5
  - **Request Description**: (empty)
  - **Initiated By**: Scott Flaherty

<table>
<thead>
<tr>
<th>Organization Type</th>
<th>Organization</th>
<th>Requested Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spend Category</td>
<td>Bond Payable Current (SC6850)</td>
<td>UR &amp; FAO Procurement Manager</td>
</tr>
</tbody>
</table>

**Add Role Request Details**

- **Add Role Assignment**: Scott Flaherty
- **For**: Scott Flaherty
- **Overall Process**: Add Role Assignment: Scott Flaherty
- **Overall Status**: In Progress

**Created**

- 10/23/2023

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Approval Steps

After submission – the request will first route to the Worker’s Manager.

Additional approvers may be required depending on the Organizations and Roles that are selected.

All Approvers have the ability to:
• Approve
• Deny
• Send Back
• Request Additional Approvers
Assignment of Access

- When all approvals have been made, the requested access is granted to the worker at the time of the last required approval.
- The worker can then perform all related tasks and view all related data provisioned to them by the role they were granted.
# My Authorization Requests Page

## My Authorization Requests

<table>
<thead>
<tr>
<th>Request ID</th>
<th>Request Name</th>
<th>Requested By</th>
<th>For Worker</th>
<th>Position ID</th>
<th>Request Status</th>
<th>Requested Date</th>
<th>Requested By (MM-DD)</th>
<th>Requested By (YYYY-MM-DD)</th>
<th>Requested By</th>
<th>Requested By (MM-DD)</th>
<th>Requested By (YYYY-MM-DD)</th>
</tr>
</thead>
<tbody>
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<tr>
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<td>2023-11-09</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Request Type**: myUHR (Common Roles)
- **Organization Type**: Add
- **Organization**: Supervisory
- **Roles**: Absence Analyst
My Authorization Requests Page

• The My Authorization Requests Page allows you to view all Authorization Requests either initiated by you or initiated on behalf of you by somewhere else. The report contains the following information for each request:

  • **Request ID** – Generated at time of request.
  • **Request Name** – Provided by initiator at time of request.
  • **Request Description** – Provided by initiator at time of request.
  • **Requested On** – Request initiation date.
  • **For Worker** – The target Worker of the request
  • **Position ID** – The position the request is targeting
  • **Request Status** – Current status of the request
  • **Awaiting Person** – Who the BP is currently awaiting.
  • **Service** – The Service the request is allocated to.
  • **Request Type** – Add or Remove
  • **Organization Type** – The Org Types included in the request
  • **Organization** – The Orgs included in the request
  • **Roles** – The Roles included in the request.
  • **Submitted By** – The initiator of the request.