# Authorization Request Application

## User Guide

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# 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

Add Roles 2 items

| Service | *Organization Type | *Organization | *Requested Roles |
|---|---|---|---|
| UR Financials (Common Roles) | Cost Center | CC11032-000 Dance Program | Cost Center Financial Analyst |
| UR Financials (Common Roles) | Grant | GR531965 CON-80003417 (GR114867) Cholette | Grant Financial Analyst |

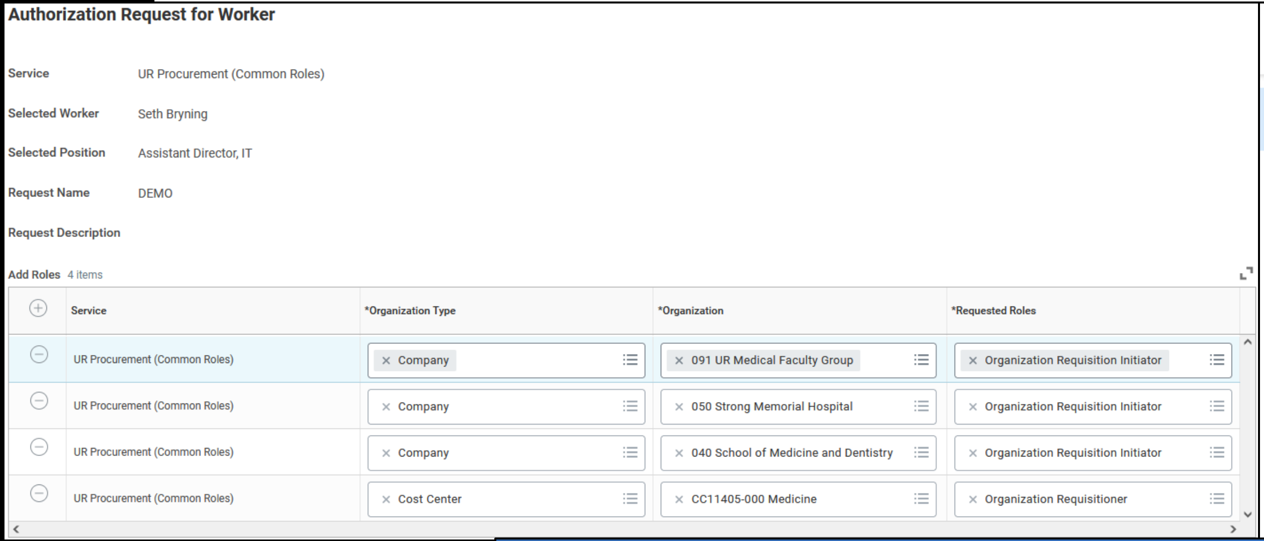
No removable roles exists for this worker

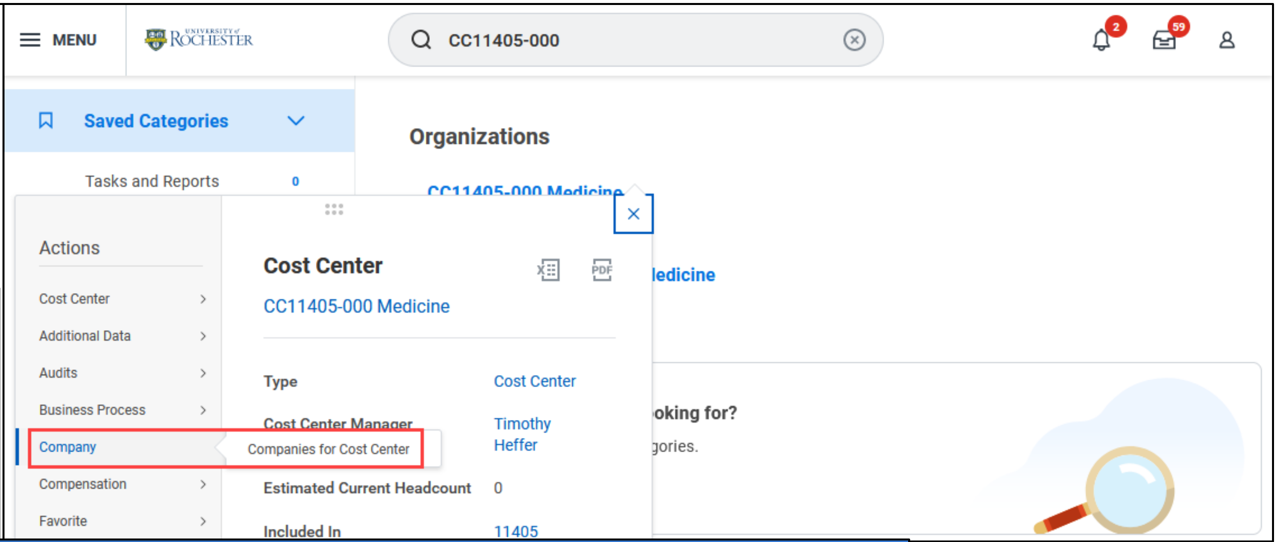
*__Note__: Analyst roles are segmented by the Organization type you select.
Example: Grants use the Grants Financials Analyst role, Cost Centers use Cost Center Financial Analyst role. Custom Organizations like UR Gift use UR FAO Analyst role

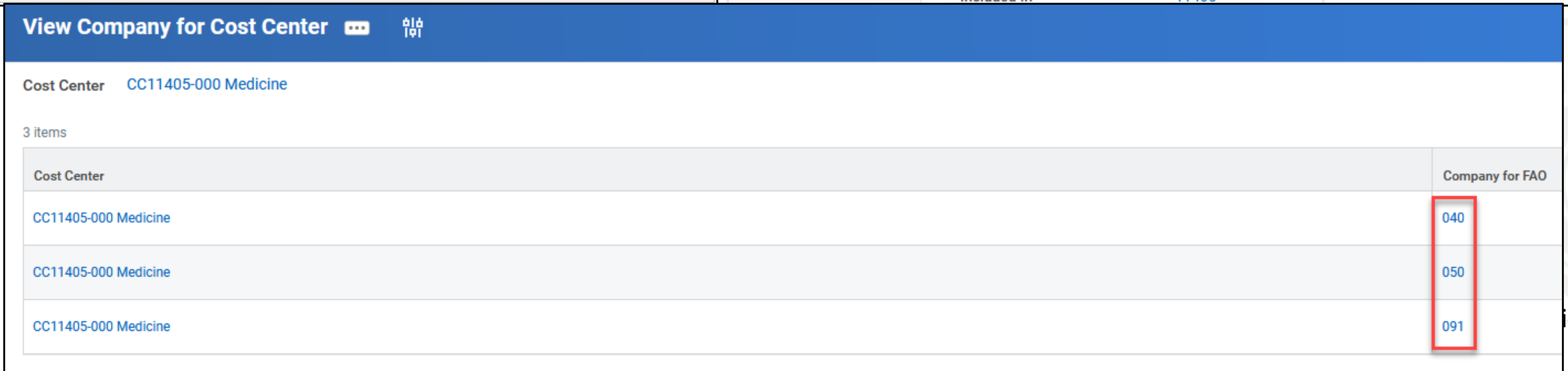
# Example: Request P2P initiator

- 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.



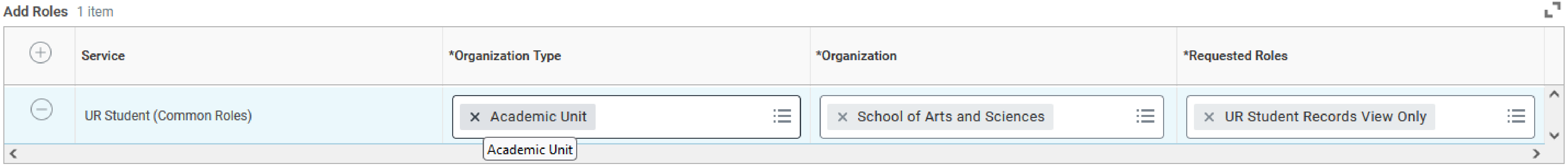




ication User Guide

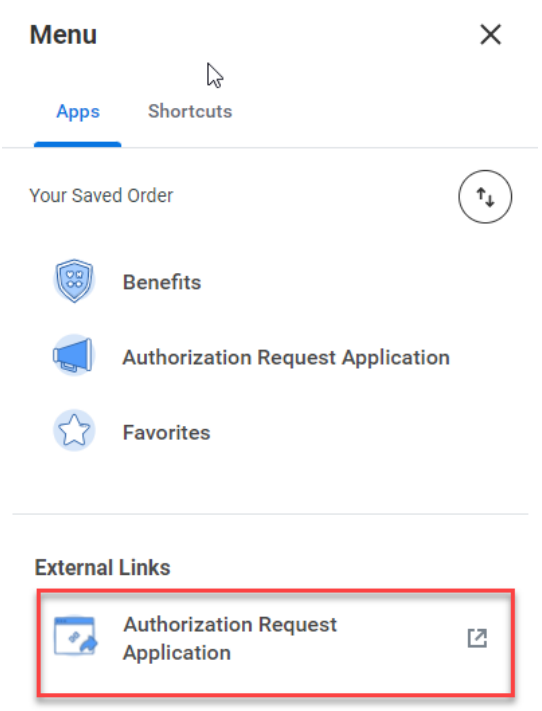
# Example: Request Student Records View Only

- 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"**




# Authorization Request Application Homepage

- There are Three pages you can access:
- **Initiate Authorization Request**
  - This page allows you initiate an Authorization Request on behalf of yourself or someone else.
- **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.
- 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.

## Authorization Requests

### Initiate Authorization Request

Add or Remove Roles

Use this button to inititiate an Add/Remove Authorization Request

Click here!

### My Authorization Requests

View My Requests

Use this button to view Authoriation Requests initiated by me or initiated for me

Click here!

### Role Descriptions

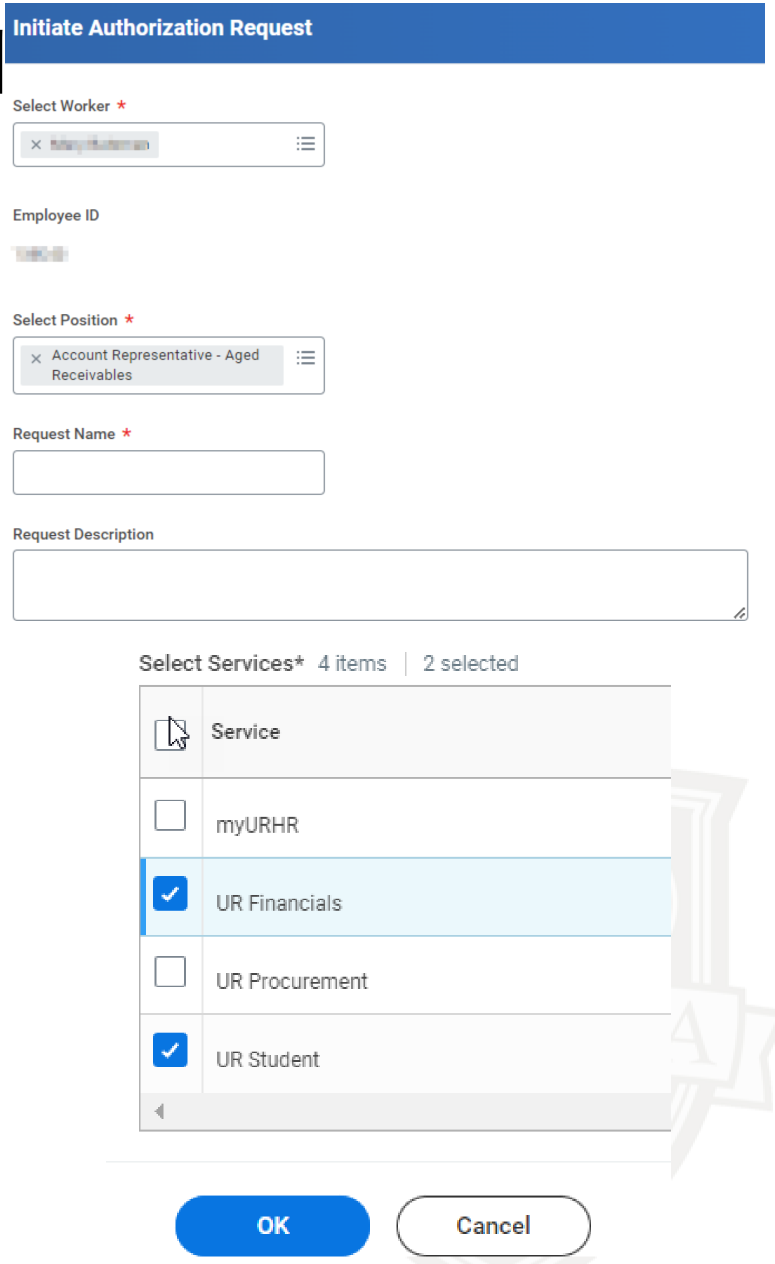
View Descriptions for Available Roles

Use this button to view all available roles

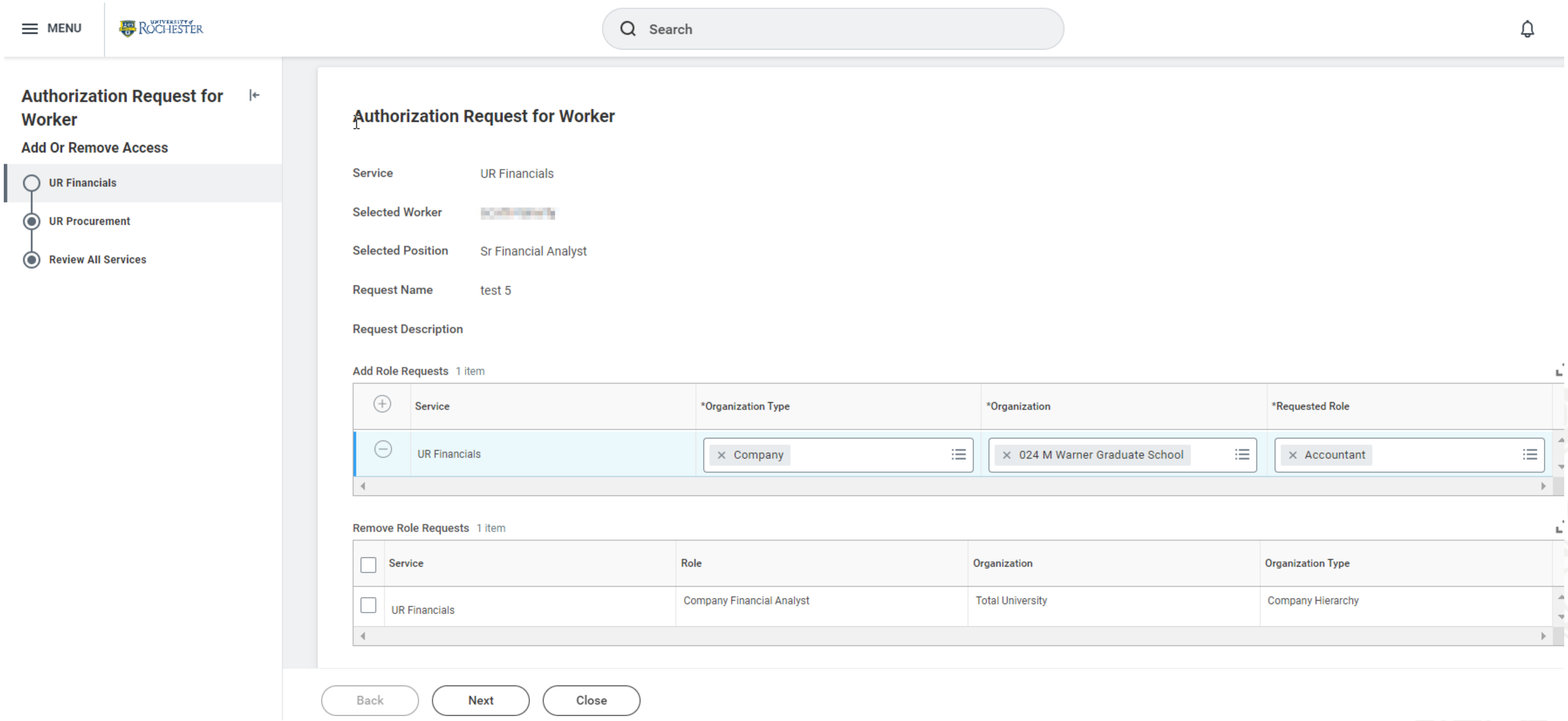
Click here!

# Initiate Authorization Req

- 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)

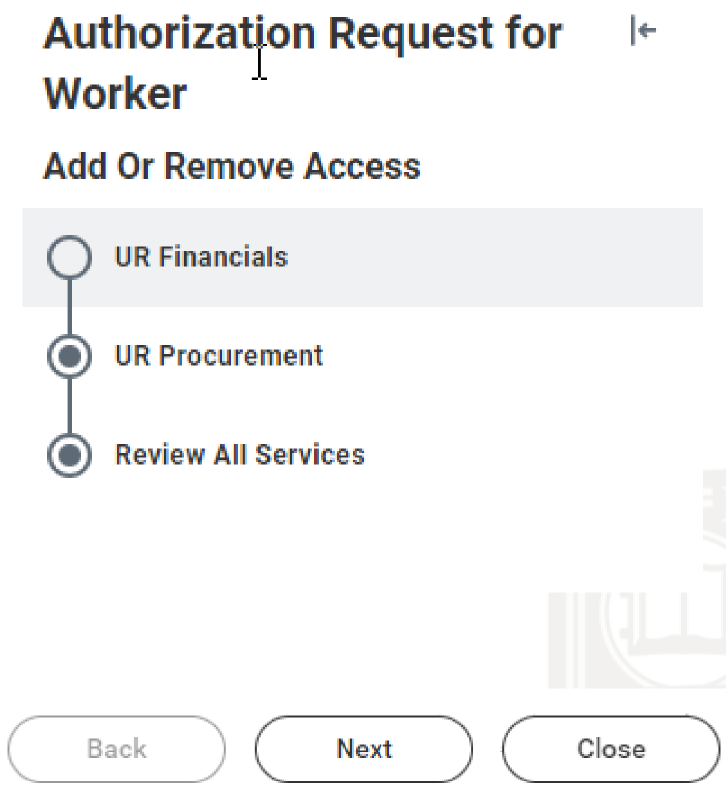


# Request Detail Page

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.



# Request Detail Page

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 Requests 1 item

| | Service | *Organization Type | *Organization | *Requested Role |
|---|---|---|---|---|
| | UR Financials | Company | 024 M Warner Graduate School | Accountant |

Remove Role Requests 1 item

| | Service | Role | Organization | Organization Type |
|---|---|---|---|---|
| | UR Financials | Company Financial Analyst | Total University | Company Hierarchy |

# Add Role Request

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

- **Organization Type**

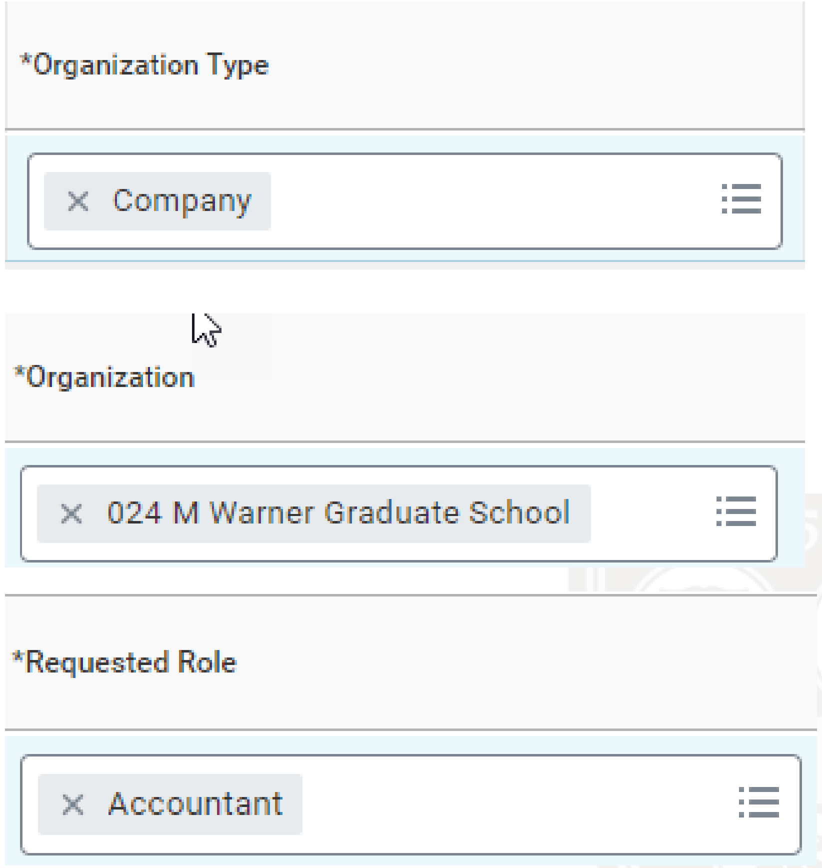
  This is the **type** of organization the worker is requesting access to (Company, Supervisory, Academic Unit, etc.)

- **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.



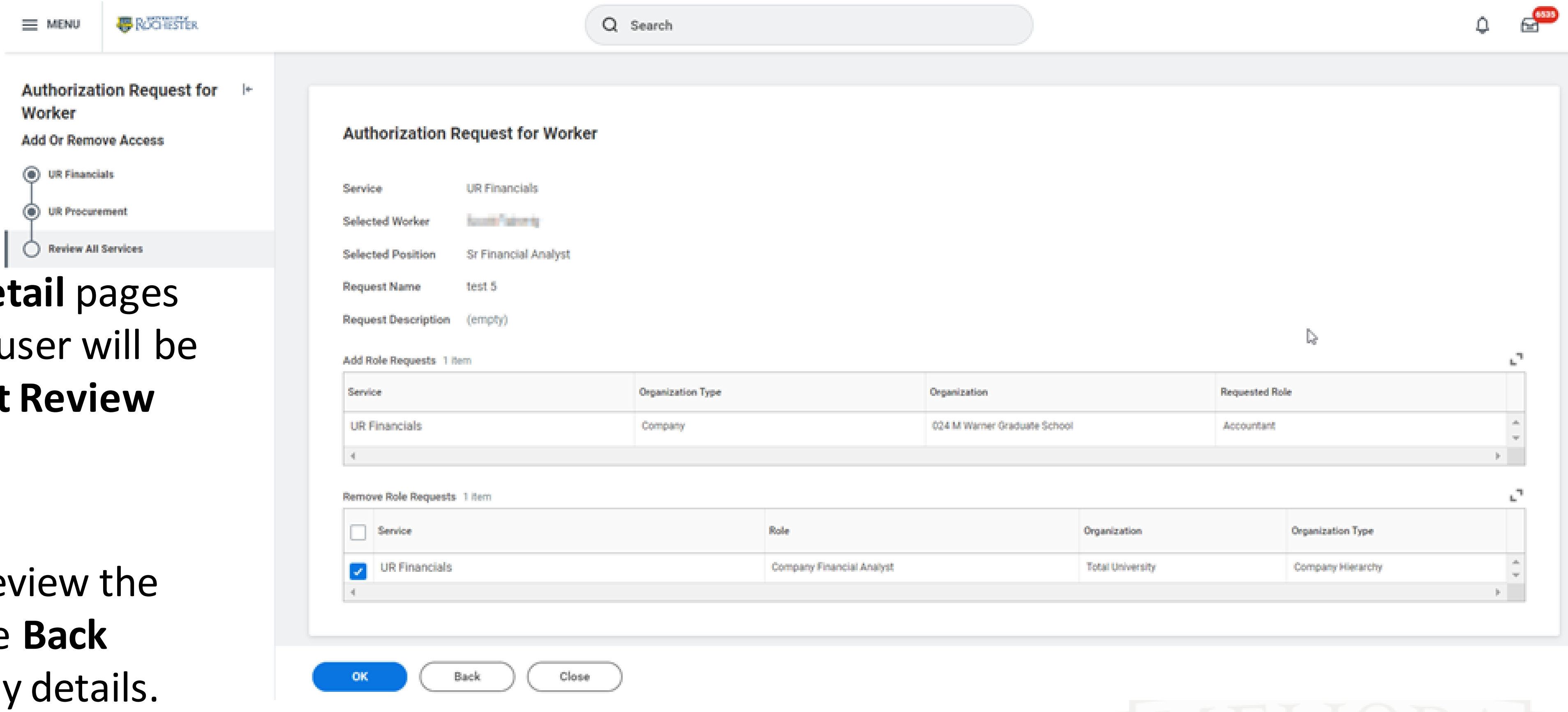
# Remove Role Request

Remove Role Requests 1 item | 1 selected

| | Service | Role | Organization | Organization Type |
|---|---|---|---|---|
| ☑ | UR Financials | Company Financial Analyst | Total University | Company Hierarchy |

- 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.

# Request Review Page

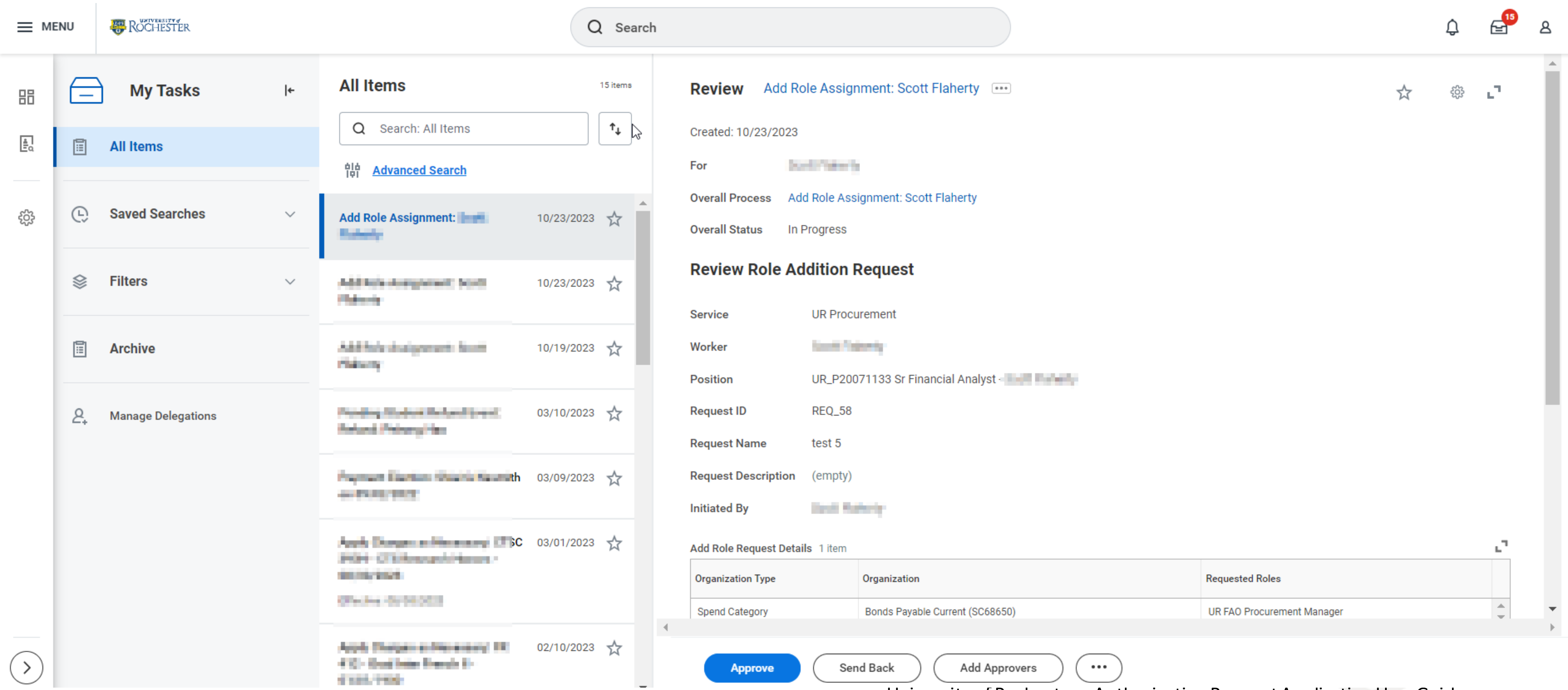



Once all **Request Detail** pages are completed, the user will be brough to a **Request Review** page.

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

Select **OK** to submit the request!

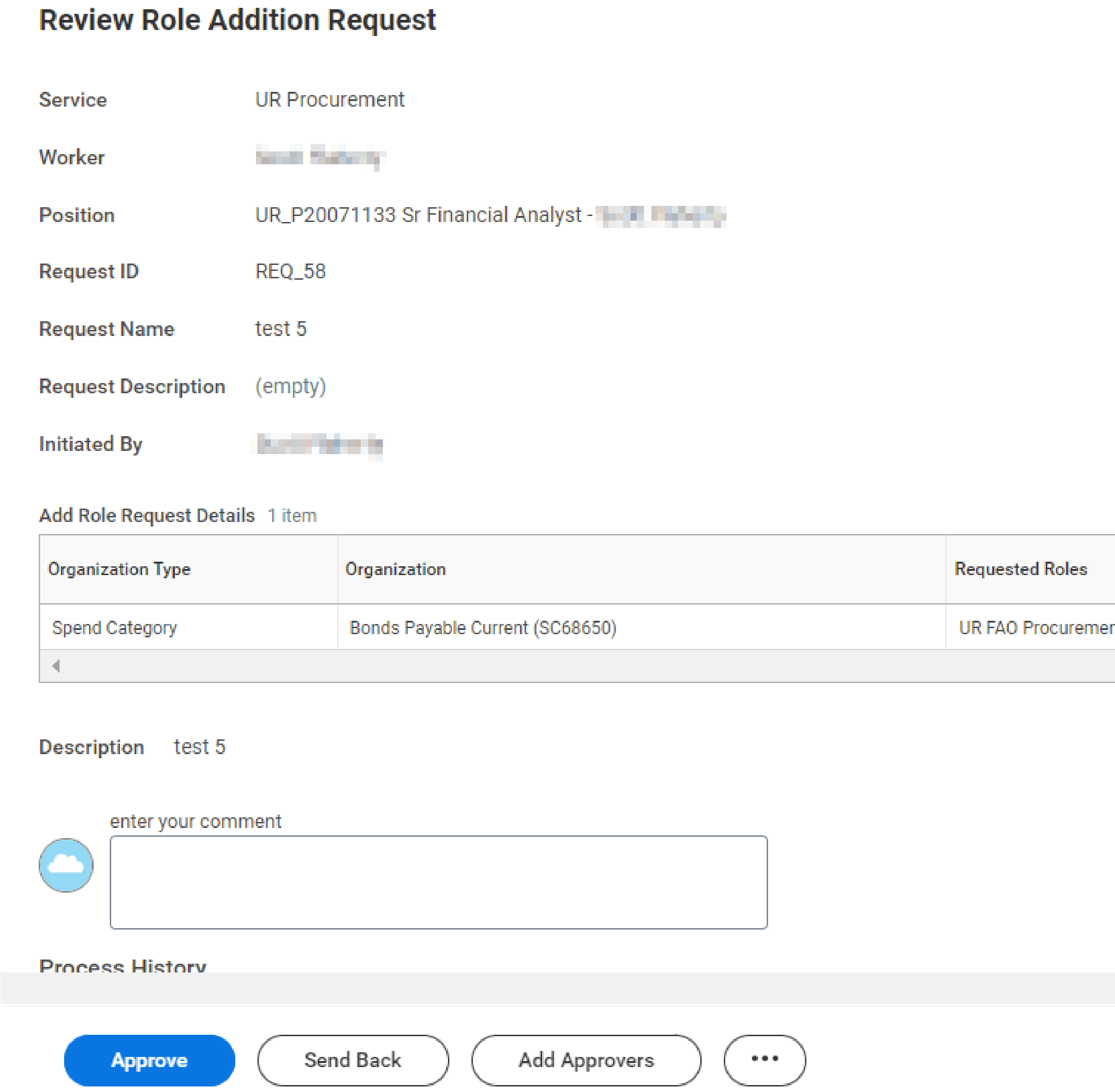
# Approval Steps



# 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



**Review Role Addition Request**

| | |
|---|---|
| Service | UR Procurement |
| Worker | [illegible] |
| Position | UR_P20071133 Sr Financial Analyst - [illegible] |
| Request ID | REQ_58 |
| Request Name | test 5 |
| Request Description | (empty) |
| Initiated By | [illegible] |

Add Role Request Details 1 item

| Organization Type | Organization | Requested Roles |
|---|---|---|
| Spend Category | Bonds Payable Current (SC68650) | UR FAO Procuremer |

Description test 5

enter your comment

Process History

Approve | Send Back | Add 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.

Authorization Request (Initaited By Me / Initiated For Me) 4 of 9 items

| Request ID | Request Name | Request Description | For Worker | Position ID | Service | Request Type | Organization Type | Organization | Roles | Request Status | Automation Remarks |
|---|---|---|---|---|---|---|---|---|---|---|---|
| REQ_58 | test 5 | | [illegible] | UR_P20071133 | UR Financials | Remove | Company Hierarchy | Total University | Company Financial Analyst | Successful | Successfully done! |
| REQ_48 | sf4 | | [illegible] | UR_P20071133 | UR Student | Remove | Academic Unit | University of Rochester | Collection Specialist | Successful | Successfully done! |
| REQ_47 | sf3 | | [illegible] | UR_P20071133 | UR Student | Add | Academic Unit | Warner School of Education | Admission Support | Successful | Successfully done! |
| REQ_41 | Revoke [illegible] | | [illegible] | UR_P20071133 | UR Student | Remove | Academic Unit | University of Rochester | UR University Bursar | Successful | Successfully done! |

Home

# My Authorization Requests Page

## My Authorization Requests

Authorization Request (Initaited By Me / Initiated For Me) 3 items

| Request ID | Request Name | Request Description | Requested On(YYYY-MM-DD) | For Worker | Position ID | Request Status | Awaiting Person | Service | Request Type | Organization Type | Organization | Roles | Subr |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| REQ_2 | v3 | | 2023-11-15 | [illegible] | UR_P20073542 | Completed | | myURHR (Common Roles) | Add | Supervisory | 100037 Department of Public Safety - Edward Schiedel | Absence Analyst | Adrie |
| REQ_1 | test | | 2023-11-15 | [illegible] | UR_P20073542 | Completed | | myURHR (Common Roles) | Add | Supervisory | U_OF_R University of Rochester | Absence Analyst | Adrie |
| Error | Smoke Test v1 11-9 | | 2023-11-09 | [illegible] | UR_P20073542 | Completed | | myURHR (Common Roles) | Add | Supervisory | 220207 Computer Science - James Roche | Absence Analyst | Adrie |

Home

# 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.