



UNIVERSITY *of*
ROCHESTER

Authorization Request Application
User Guide

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- [Procurement](#)
- [Student](#)

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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)	x Cost Center	x CC11032-000 Dance Program	x Cost Center Financial Analyst
-	UR Financials (Common Roles)	x Grant	x GR531965 CON-80003417 (GR114867) Cholette	x 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.

Authorization Request for Worker

Service: UR Procurement (Common Roles)

Selected Worker: Seth Bryning

Selected Position: Assistant Director, IT

Request Name: DEMO

Request Description:

Add Roles: 4 items

+	Service	*Organization Type	*Organization	*Requested Roles
-	UR Procurement (Common Roles)	Company	091 UR Medical Faculty Group	Organization Requisition Initiator
-	UR Procurement (Common Roles)	Company	050 Strong Memorial Hospital	Organization Requisition Initiator
-	UR Procurement (Common Roles)	Company	040 School of Medicine and Dentistry	Organization Requisition Initiator
-	UR Procurement (Common Roles)	Cost Center	CC11405-000 Medicine	Organization Requisitioner

MENU UNIVERSITY OF ROCHESTER

CC11405-000

Organizations

Tasks and Reports 0

CC11405-000 Medicine

Actions

- Cost Center > CC11405-000 Medicine
- Additional Data >
- Audits >
- Business Process >
- Company > Companies for Cost Center**
- Compensation > Estimated Current Headcount 0
- Favorite > Included In 11405

Cost Center Manager Timothy Heffer

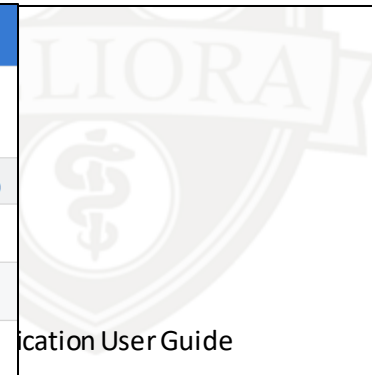
Looking for? ...

View Company for Cost Center

Cost Center CC11405-000 Medicine

3 items

Cost Center	Company for FAO
CC11405-000 Medicine	040
CC11405-000 Medicine	050
CC11405-000 Medicine	091



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**

Add Roles 1 item

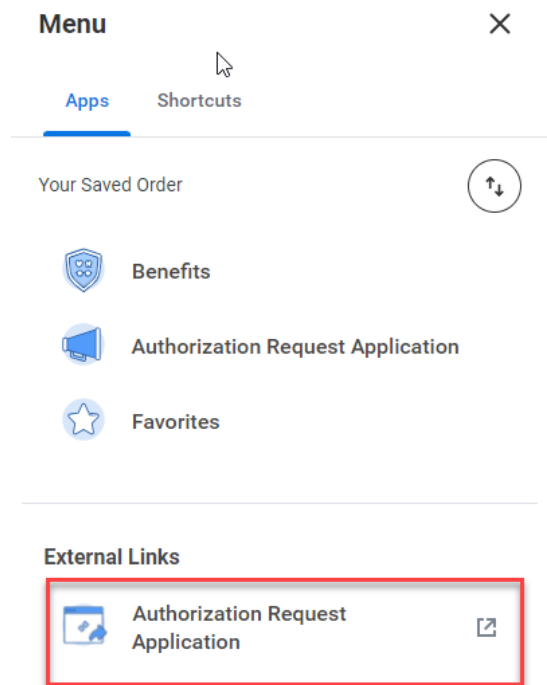
+	Service	*Organization Type	*Organization	*Requested Roles
-	UR Student (Common Roles)	x Academic Unit	x School of Arts and Sciences	x UR Student Records View Only

Academic Unit



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 initiate an Add/Remove Authorization Request

[Click here!](#)



My Authorization Requests

View My Requests

Use this button to view Authorization 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 Request

- 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.

Initiate Authorization Request

Select Worker *

Employee ID

Select Position *

Request Name *



Request Description

Select Services* 4 items | 2 selected

<input type="checkbox"/>	Service
<input type="checkbox"/>	myURHR
<input checked="" type="checkbox"/>	UR Financials
<input type="checkbox"/>	UR Procurement
<input checked="" type="checkbox"/>	UR Student

OK Cancel

Request Detail Page(s)

MENU  Search 

Authorization Request for Worker | Add Or Remove Access

- UR Financials
- UR Procurement
- Review All Services

Authorization Request for Worker

Service: UR Financials

Selected Worker: [Redacted]

Selected Position: Sr Financial Analyst

Request Name: test 5

Request Description

Add Role Requests 1 item

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

Remove Role Requests 1 item

<input type="checkbox"/>	Service	Role	Organization	Organization Type
<input type="checkbox"/>	UR Financials	Company Financial Analyst	Total University	Company Hierarchy

Back Next Close

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.

Authorization Request for Worker

Add Or Remove Access

- UR Financials
- UR Procurement
- Review All Services

Back

Next

Close

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

<input type="checkbox"/>	Service	Role	Organization	Organization Type
<input type="checkbox"/>	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**

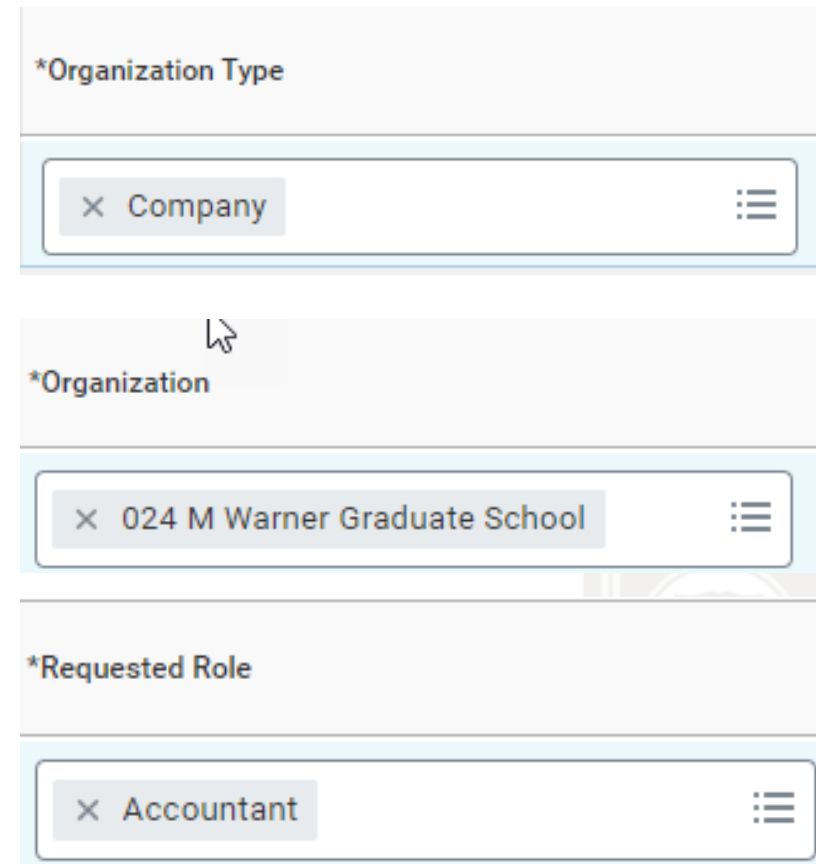
This is the **type** of organization the worker is requesting access to (Company, Supervisory, Academic Unit, etc.)

- **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.



The screenshot displays a form with three required fields, each with a dropdown menu. The first field is labeled '*Organization Type' and has 'Company' selected. The second field is labeled '*Organization' and has '024 M Warner Graduate School' selected. The third field is labeled '*Requested Role' and has 'Accountant' selected. Each dropdown menu includes a close button (X) and a menu icon (three horizontal lines).

Remove Role Request

Remove Role Requests 1 item | 1 selected

	Service	Role	Organization	Organization Type
<input type="checkbox"/>				
<input checked="" type="checkbox"/>	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

The screenshot shows the 'Request Review Page' for an 'Authorization Request for Worker'. The page includes a navigation menu on the left with options: 'UR Financials', 'UR Procurement', and 'Review All Services'. The main content area displays the following details:

- Service:** UR Financials
- Selected Worker:** [Redacted]
- Selected Position:** Sr Financial Analyst
- Request Name:** test 5
- Request Description:** (empty)

Below these details are two tables:

Add Role Requests (1 item)

Service	Organization Type	Organization	Requested Role
UR Financials	Company	Q24 M Warner Graduate School	Accountant

Remove Role Requests (1 item)

<input type="checkbox"/>	Service	Role	Organization	Organization Type
<input checked="" type="checkbox"/>	UR Financials	Company Financial Analyst	Total University	Company Hierarchy

At the bottom of the page, there are three buttons: 'OK' (highlighted in blue), 'Back', and 'Close'.


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


MENU








 **My Tasks**

 **All Items**

 **Saved Searches**

 **Filters**

 **Archive**

 **Manage Delegations**

All Items 15 items

[Advanced Search](#)

Add Role Assignment: Scott Flaherty
10/23/2023
☆

Add Role Assignment: Scott Flaherty
10/23/2023
☆

Add Role Assignment: Scott Flaherty
10/19/2023
☆

Pending Student Role Addition: Richard Flaherty
03/10/2023
☆

Request Student Role Addition: Richard Flaherty
03/09/2023
☆

Apply Changes to Necessary: EFBC
03/01/2023
☆

Apply Changes to Necessary: EFBC
02/10/2023
☆

Review Add Role Assignment: Scott Flaherty

Created: 10/23/2023

For: Scott Flaherty

Overall Process: Add Role Assignment: Scott Flaherty

Overall Status: In Progress

Review Role Addition Request

Service: UR Procurement

Worker: Scott Flaherty

Position: UR_P20071133 Sr Financial Analyst - Scott Flaherty

Request ID: REQ_58

Request Name: test 5

Request Description: (empty)

Initiated By: Scott Flaherty

Add Role Request Details 1 item

Organization Type	Organization	Requested Roles
Spend Category	Bonds Payable Current (SC68650)	UR FAO Procurement Manager

Approve

Send Back




Add Approvers

⋮

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 
Position UR_P20071133 Sr Financial Analyst - 
Request ID REQ_58
Request Name test 5
Request Description (empty)
Initiated By 

Add Role Request Details 1 item

Organization Type	Organization	Requested Roles
Spend Category	Bonds Payable Current (SC68650)	UR FAO Procurement

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 (Initiated 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		Grant & Renew	UR_P20071133	UR Financials	Remove	Company Hierarchy	Total University	Company Financial Analyst	Successful	Successfully done!
REQ_48	sf4		Grant & Renew	UR_P20071133	UR Student	Remove	Academic Unit	University of Rochester	Collection Specialist	Successful	Successfully done!
REQ_47	sf3		Grant & Renew	UR_P20071133	UR Student	Add	Academic Unit	Warner School of Education	Admission Support	Successful	Successfully done!
REQ_41	Revoke		Grant & Renew	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 (Initiated 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		UR_P20073542	Completed		myURHR (Common Roles)	Add	Supervisory	100037 Department of Public Safety - Edward Schiedel	Absence Analyst	Adrie
REQ_1	test		2023-11-15		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		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.