Delegation Set Up for the DEPT group

This should take 10 minutes or less to complete

Log into Workday
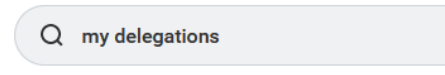Copy the following link:
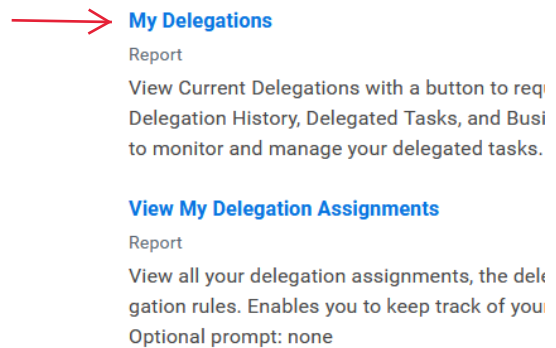https://wd5.myworkday.com/rochester/d/home.htmld
Choose University of Rochester and login with your credentials

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

Select My Delegations

Select the **Manage Delegations** button in the lower left
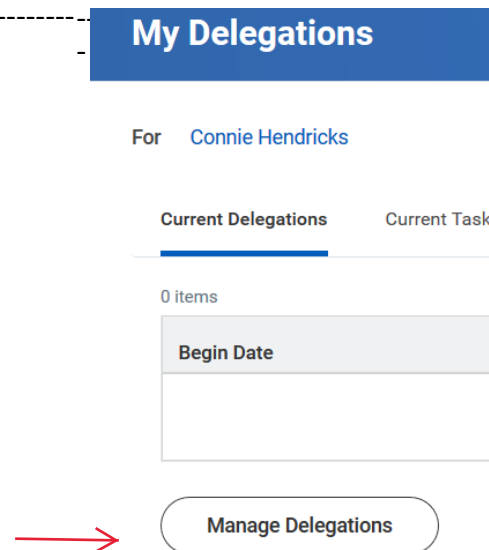
Enter:
Begin Date: today's date
End Date 1/31/20XX
(XX is one year from the today's current year)

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

Follow these steps to enter the first delegate:

* Type **Christine Confer,** hit enter and check the box next to her name

* Type **Pamela Schenk**, hit enter and check the box next to her name

* Type **Nicholas Marcello**, hit enter and check the box next to his name

* Type **Connie Hendricks**, hit enter and check the box next to her name

* Uncheck box "Use Default Alternative"

* In the alternate delegate box remove all but **Bill Burrows** and hit enter, then tab

* Check that your entries match the example

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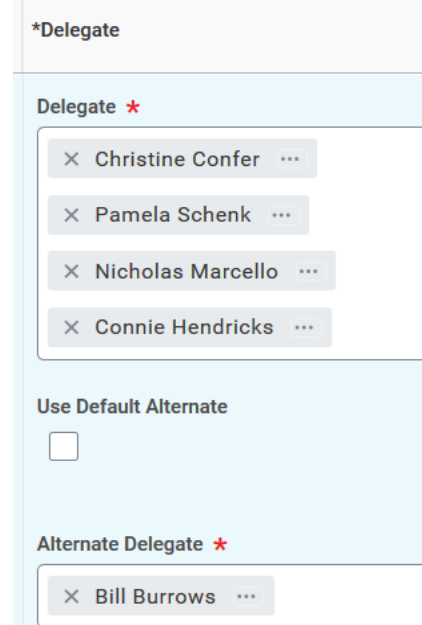
* In box under **Start on My Behalf** box type **Create** and hit enter

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

* Check that your entries match the example

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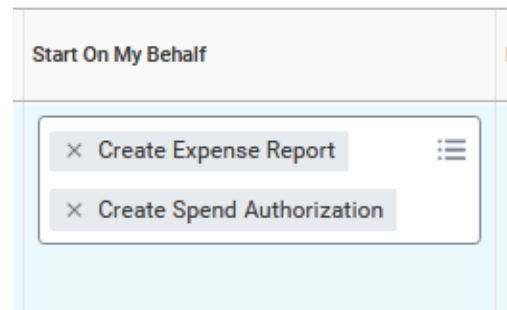
* In the box under **Do Inbox Tasks on my Behalf** click the choice **For Business Process**

* 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
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

* Leave Delegation Rule box blank
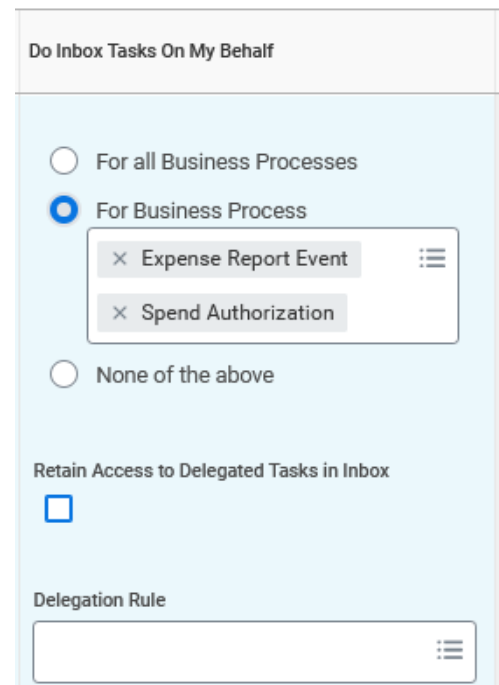
** If you leave this checked you will receive notifications for every expense report we initate and all approvals being made on behalf of you. You, Pam, Christine, Nick and will receive notifications to approve expense reports. This could cause some confusion because our process is that XXXXX approve 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.

-Your Delegation entries should look like this

Click Submit at the bottom of the screen

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 Pam, Christine, Nick and Connie 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 https://www.pas.rochester.edu/about/department-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.