## **Delegation Set Up for the DEPT group**

This should take 10 minutes or less to complete workday Log into Workday Copy the following link: University of Rochester https://wd5.myworkday.com/rochester/d/home.htmld Sign in for University and URMC faculty, staff, and students Choose University of Rochester and login with your credentials Q my delegations Type My Delegations in the search box in Workday and hit enter Tasks and Reports Select My Delegations My Delegations Report View Current Delegations with a button to requ Delegation History, Delegated Tasks, and Busi to monitor and manage your delegated tasks. **View My Delegation Assignments** Report View all your delegation assignments, the dele gation rules. Enables you to keep track of you Optional prompt: none **My Delegations** Select the Manage Delegations button in the lower left For **Connie Hendricks Current Delegations** Current Task 0 items **Begin Date** Manage Delegations Enter: Begin Date: today's date (+)\*Begin Date End Date End Date 1/31/20XX (XX is one year from the today's current year) MM/DD/YYYY 🛱 01/31/2024 📄 Note: Delegations require a specific date range

and cannot be set for more than one year.

Follow	these	steps	to	enter	the	first	delega	ite:
							<u> </u>	

\* 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

*Delegate					
Delegate *					
× Christine Confer					
× Pamela Schenk					
× Nicholas Marcello …					
× Connie Hendricks					
Use Default Alternate					
Alternate Delegate *					
× Bill Burrows …					

* In box under <b>Start on My Behalf</b> box type <b>Create</b> and hit enter	Start On My Behalf		
* Two results should be found. Check both of the boxes: Create expense report and Create spend authorization	<ul> <li>× Create Expense Report</li> <li>★ Create Spend Authorization</li> </ul>		
* Check that your entries match the example			

\* 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.

Do Inbox Tasks On My Behalf					
For Business Process					
× Expense Report Event ∷≣					
$\times$ Spend Authorization					
None of the above					
Retain Access to Delegated Tasks in Inbox					
Delegation Rule					
:=					

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## -Your Delegation entries should look like this

New Delegation 1 item								
(+)	*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf			
Ð	MM/DD/YYYY 🖻 Today's date	01/31/ <u>2024</u>	Delegate *          X Christine Confer ···       Image: Second	Create Expense Report     Create Spend Authorization	For all Business Processes     For Business Processes     Expense Report Event :=     Spend Authorization     None of the above  Retain Access to Delegated Tasks in Inbox  Delegation Rule			
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 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 <a href="https://www.pas.rochester.edu/about/department-links.html">https://www.pas.rochester.edu/about/department-links.html</a>

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.