

Assign Roles

Overview

This job aid outlines the process for an HR Partner, HR Contact or Organization Partner to assign role-based security roles to a filled position and an unfilled position

Prerequisites: Position requires specific security roles

Important Information:

- This can be a stand-alone process or a sub-process (Inbox item) during the various staffing processes like Hire, Add Additional Job, Create Position, Change Job, etc.
- Roles are assigned to the position, not the employee. If an employee vacates a position, the assigned roles will remain for the next person who occupies it
- Employees can hold roles for supervisory organizations that they are not a member. For example, an HR Partner might be an employee in the HR Supervisory Organization but hold the role of HR Partner for the Finance, Faculty, and Operations Supervisory Organizations
- Roles may be assigned to either an Employee or a Contingent Worker position
- Roles are assigned to an organization, whether it be a Supervisory Organization or a Company
- In addition to using Assign Roles, roles can be removed from a position by using the Assign Roles -Add/Remove task, or roles can be switched between positions by using Assign Roles – Change Assignments, both found by navigating to the Worker Profile and selecting Security Profile

Steps

Assign Roles to a Filled Position

From the Workday Home page:

- 1. Search for and select the person whose position you wish to assign roles to
- 2. The Worker Profile will display.
- Click the Actions button and select Security Profile > Assign Roles

Actions		Education
Payroll	>	
Payroll Interface	>	0
Personal Data	>	
a Safety Incident	>	
Talent	>	4
Time and Leave	>	Assign Roles
Worker History	>	Assign Roles - Add/Remove Assign Roles - Change Assignments
Favorite	>	Start Proxy
Security Profile	<	View Support Roles
Additional Data	>	





4. Select the correct Effective Date and verify that the correct Worker is displayed, then click OK



- 5. Click OK
- 6. Click the Add button to add a row
- 7. Complete the following fields:
 - Role Enabled For: Select the supervisory organization you want to assign the role to

Effective Date 03/13/2018			
3 items			
(+)	*Role Enabled For		
Θ	x Supervisory Organization ∷≣		

Explore

- Role: Select the role to assign
- Assigned To: Select the Employee to assign the role to (their name is at the top of the page)



Note: The role is assigned to the position, not the worker

• **Default Worker**: The worker who holds this role by default will display here



<u>Note</u>: Certain roles, such as Manager, may be limited to single assignment. This was not the case in our example

- 8. Repeat Steps 6 and 7 until you have added all needed security roles to the position
- 9. Use the **Comments** box to document the purpose of assigning roles to the position to support the approval process
- 10. Click Submit

Up Next

The request will be routed to the Role Maintainer to review / approve

Assign Roles to an Unfilled Position

You can also assign roles to an unfilled position

 Navigate to the Supervisory Organization where the unfilled position resides and click the Staffing tab



2. Click the **Related Actions** icon for the position and select **Roles > Assign Roles**

Members I	Details Staffing	Roles	Security Groups	Organiza
Staffing Model	Actions		Position Res	trictio
Positions withou	Position Restrictions	>		
oonaono maiou	Compensation	>	Supervisory Organization	n .1200
Position Restrictic	c Favorite	>		
	Hire	>		
M31239 Vice Pre: Job Appli Provost for Divers Job Chan	Job Application	>		
	s Job Change	>		
M41236 Profess	c Organization	>	Assign Roles	
P-50775 N-aff	Payroll	>	Assign Roles - Add/Remove	
1 (Unfilled)	Roles		Assign Roles - Change Assignments	

3. On the Assign Organization Roles page, the position will display. Edit the Effective Date if needed. Today's date will default into this field

Effective Date	*	03/13/2018 💼
Role Assignee for Role Assignment	*	P-50775 Non-affiliated-Student Worker-1 (Unfilled)

- 4. Click OK
- 5. Complete the information as instructed in the previous section of this job aid starting at step 6

Up Next

The business process will be sent to the Role Maintainer for Review / Approval

This completes the initiation step of the **Assign Roles** business process

