Explore

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.

3. Click the **Actions** button and select **Security Profile > Assign Roles**
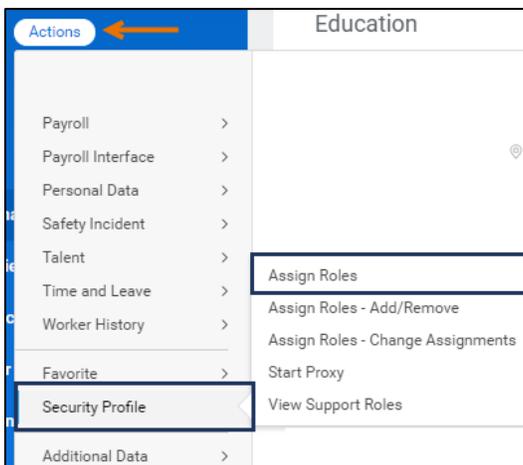
4. Select the correct **Effective Date** and verify that the correct **Worker** is displayed, then click **OK**
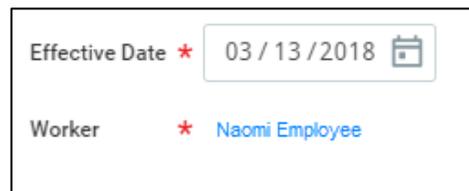
5. Click **OK**

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

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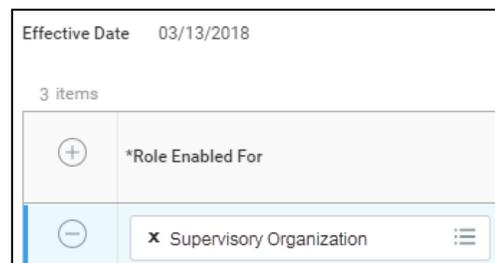
- **Role**: Select the role to assign
- **Assigned To**: Select the Employee to assign the role to (their name is at the top of the page)
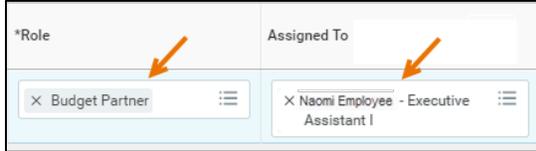
Note: The role is assigned to the position, not the worker

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

Note: 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

1. Navigate to the Supervisory Organization where the unfilled position resides and click the **Staffing** tab
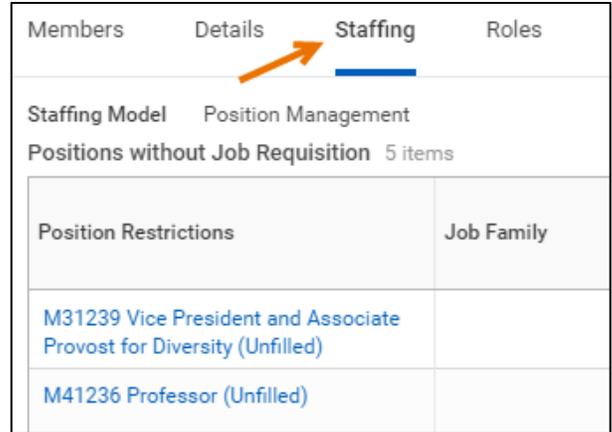
2. Click the **Related Actions** icon for the position and select **Roles > Assign Roles**
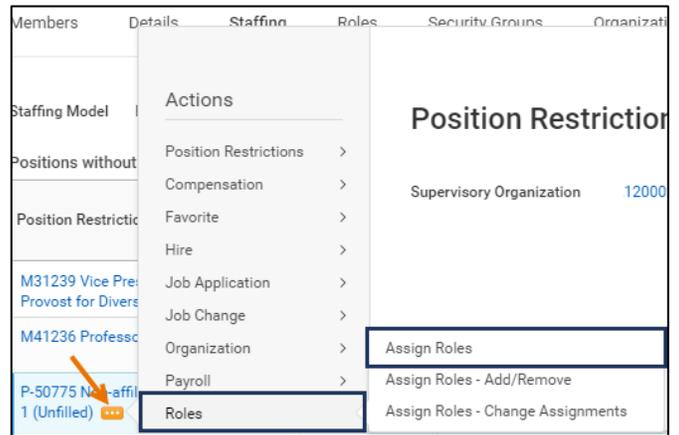
3. On the **Assign Organization Roles** page, the position will display. Edit the **Effective Date** if needed. Today's date will default into this field

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