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
• **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