How a PI or Manager Creates a Position

1. Log in to Workday using your **ID** and **Password.**

2. In the search bar ❶ in Figure 1, type **Create Position** and click enter. **Figure 2** below will appear.

Figure 1

3. Click on **Task and Reports ❷,** then click on **Create Position ❸**, a screen will appear as shown in **Figure 3** below. Click on **OK ❹**. This will open a window to **Create a Position** seen in **Figure 4** on **Page 2**.

   Please Note: The link will open and display all the job descriptions in detail on a seprate window ❺.

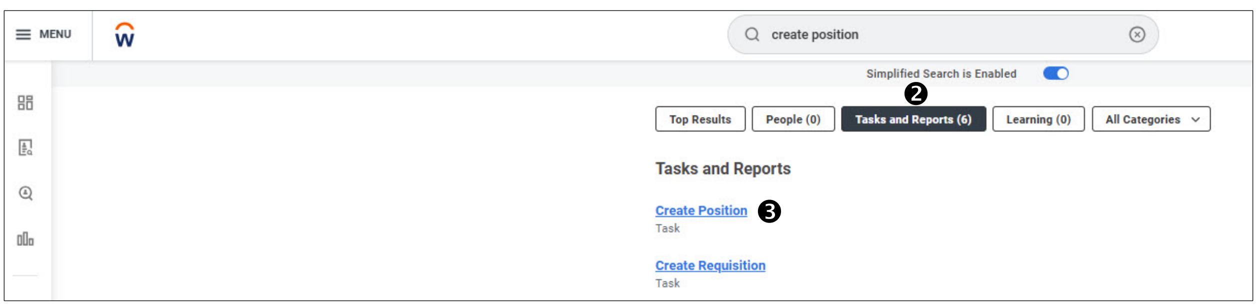


Figure 2

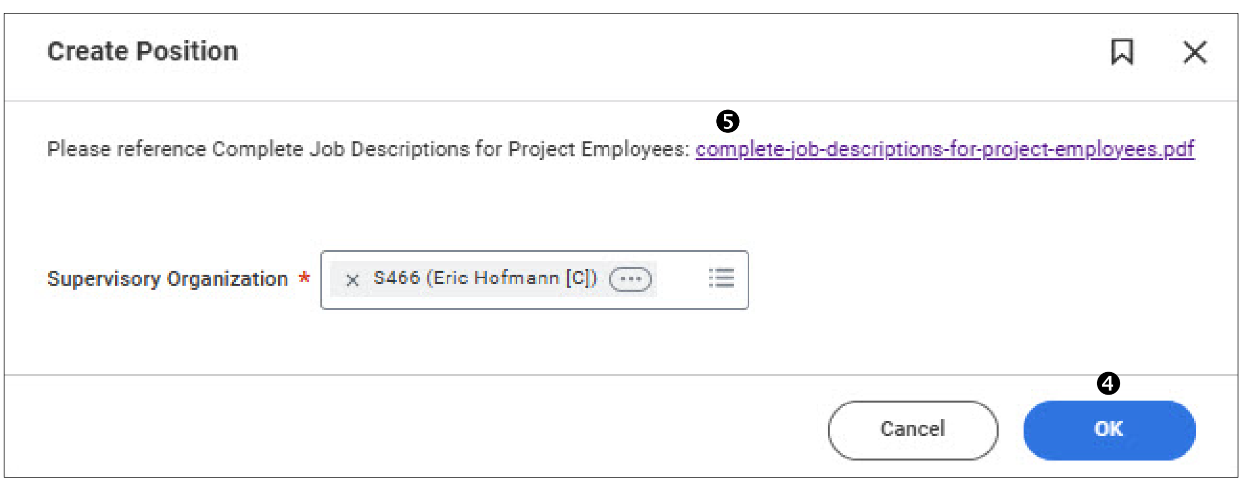


Figure 3

4. Next, you will have to complete the following fields. Refer to **Pages 3** and **4** for explanations of the titles on **Page 2, Figure 4**.
   Please Note: the link at the top will open a PDF of the Job Description you are in.

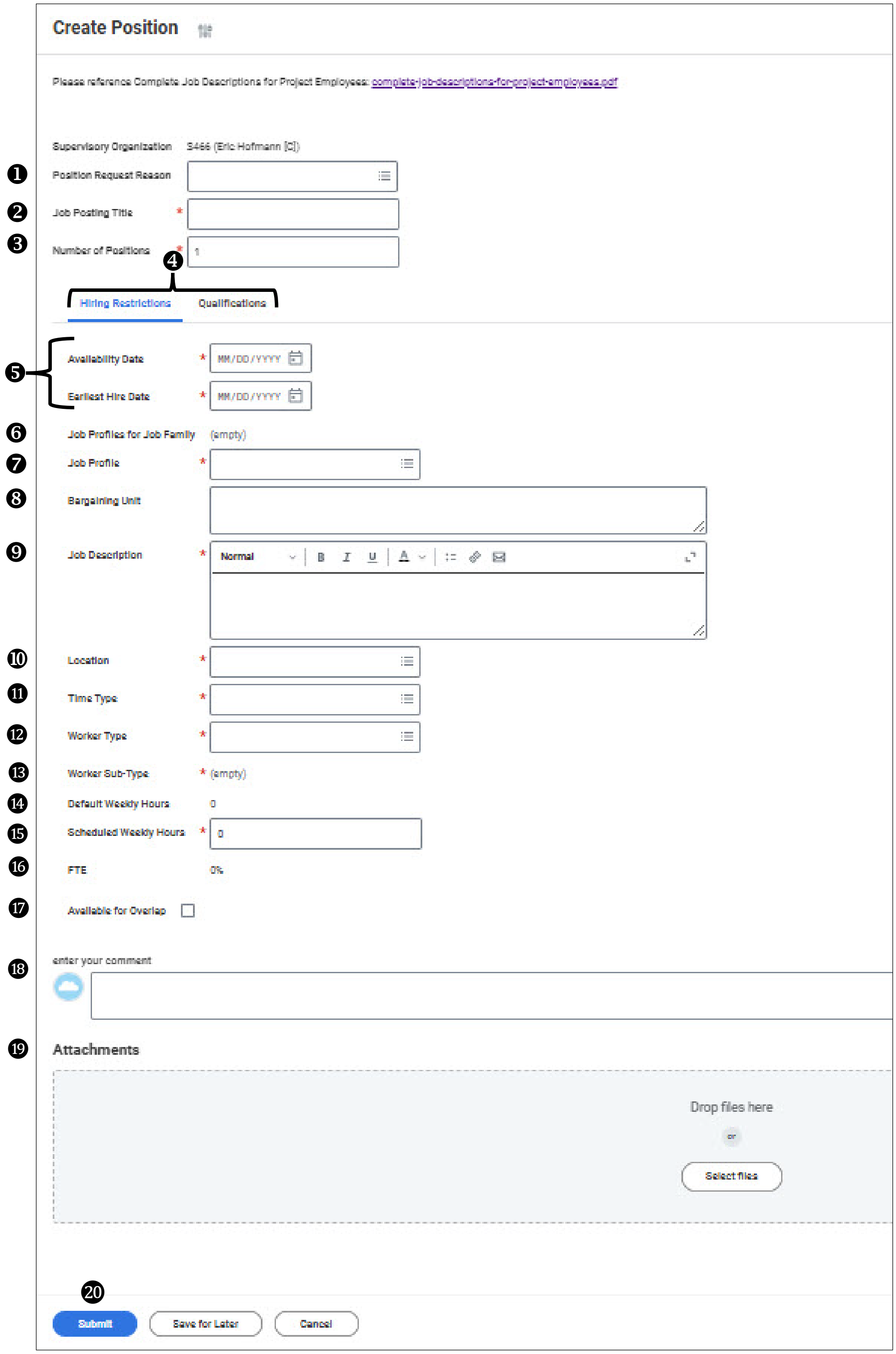


Figure 4

5. Understanding the **Create Position Request Screen.**

❶ **Position Request Reason:** Indicate if this newly created position is budgeted, not budgeted, or a replacement.

❷ **Job Posting Title:** Type in Job Title. You need to be accurate with the title because it will flow into the job posting. An example is a Graduate Research Assistant.

❸ **Number of Positions:** The number of positions you wish to hire for this role. This will default to 1 unless changed.

❹ **Hiring Restrictions or Qualifications Tab**: We are currently on the Hiring Restrictions Tab. The Qualifications Tab is where you fill in the qualifications for the job posting, such as required languages, experience, education, etc.

❺ **Availability Date or Earliest Hire Date:** The **Availability Date** is the date the position will be available. You can use the current date. The **Earliest Hire Date** is the earliest date an employee has been hired in this position.

❻ **Job Profile for Families:** Reflects the classification such as a Research Assistant.

❼ **Job Profile:** Click the prompt icon, which is represented by three stacked lines on the right side of the box. Your choices are **Suggested**, **Recent**, and **By Job Family**. When you click on the arrow icon next to the title, a drop-down menu will open offering job profiles to choose from. Once selected, the job description will be prefilled.

❽ **Bargaining Unit:** This will be prefilled for PSC schools only.

❾ **Job Description:** This will auto-populate, if not, Type in the job description of the job profile selected.

❿ **Location:** Click the prompt icon, which is represented by three stacked lines on the right side of the box. A drop-down menu will appear with all the locations. Choose the primary location where the individual in this position will primarily work.

⓫ **Time Type:** Click the prompt icon, which is represented by three stacked lines on the right side of the box. A drop-down menu will appear, offering the choices of **Full-Time** or **Part-Time**. Select the correct choice.

⓬ **Worker Type:** Click the prompt icon, which is represented by three stacked lines on the right side of the box. A drop-down menu will appear, offering the choices of **Employee** or **Contingent Worker**. Select the correct choice.

⑬ **Worker Sub-Type:** Click the prompt icon, which is represented by three stacked lines on the right side of the box. A drop-down menu will appear, offering the choices of the worker type. Choose or type the Job Title you filled in earlier in the number ❸.

⑭ **Default Weekly Hires:** The hours will default to 35 hours.

⑮ **Scheduled Weekly Hours:** Input the weekly hours the employee will be working.

⑯ **FTE:** This will be prefilled.

⑰ **Available Overlap**: Allows you to hire a new employee into a position before the current employee has left, enabling a period of overlap for training or to ensure seamless service continuity.

⑱ **Comments:** Input comments for requesting the position.

⑲ **Attachments:** Attach any necessary documentation.

⑳ **Submit**: After clicking Submit, a **Success! Event submitted** pop-up box will appear as shown in **Figure 6** on **Page 6**. You also have the option to **Save for Later** or **Cancel**.

6. **Figure 5** below is a sample of the **Create Position Request Screen** completed**.**

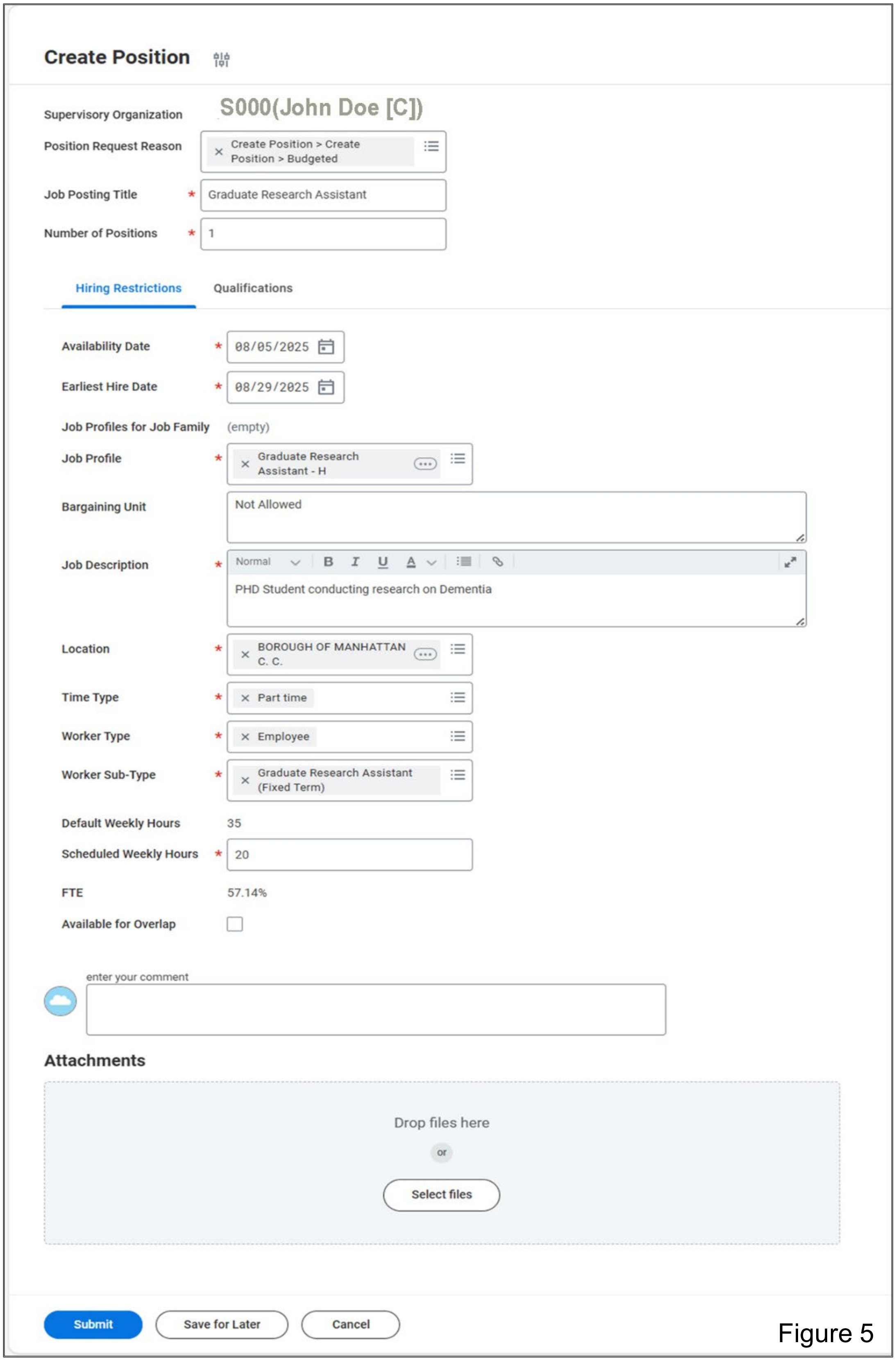


Figure 5

7. After clicking **Submit**, a **Success! Event submitted** pop-up box will appear as shown in **Figure 6** below. Click on **Open** ❶ to go to the next required step.

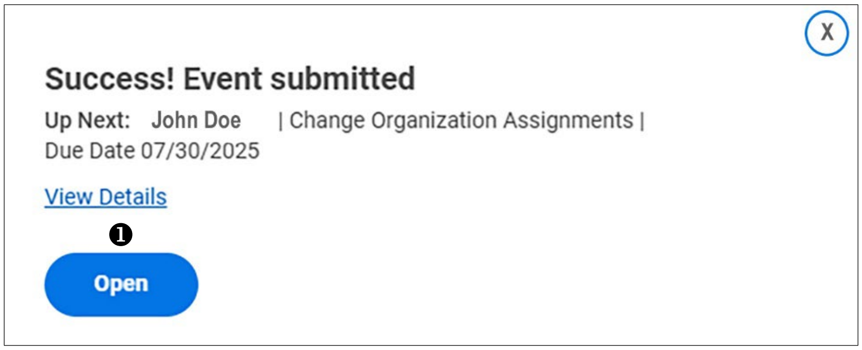


Figure 6

7. Complete the **Change Organization Assignments** section. Refer to **Page 8** for explanations of the titles in **Figure 7** below.

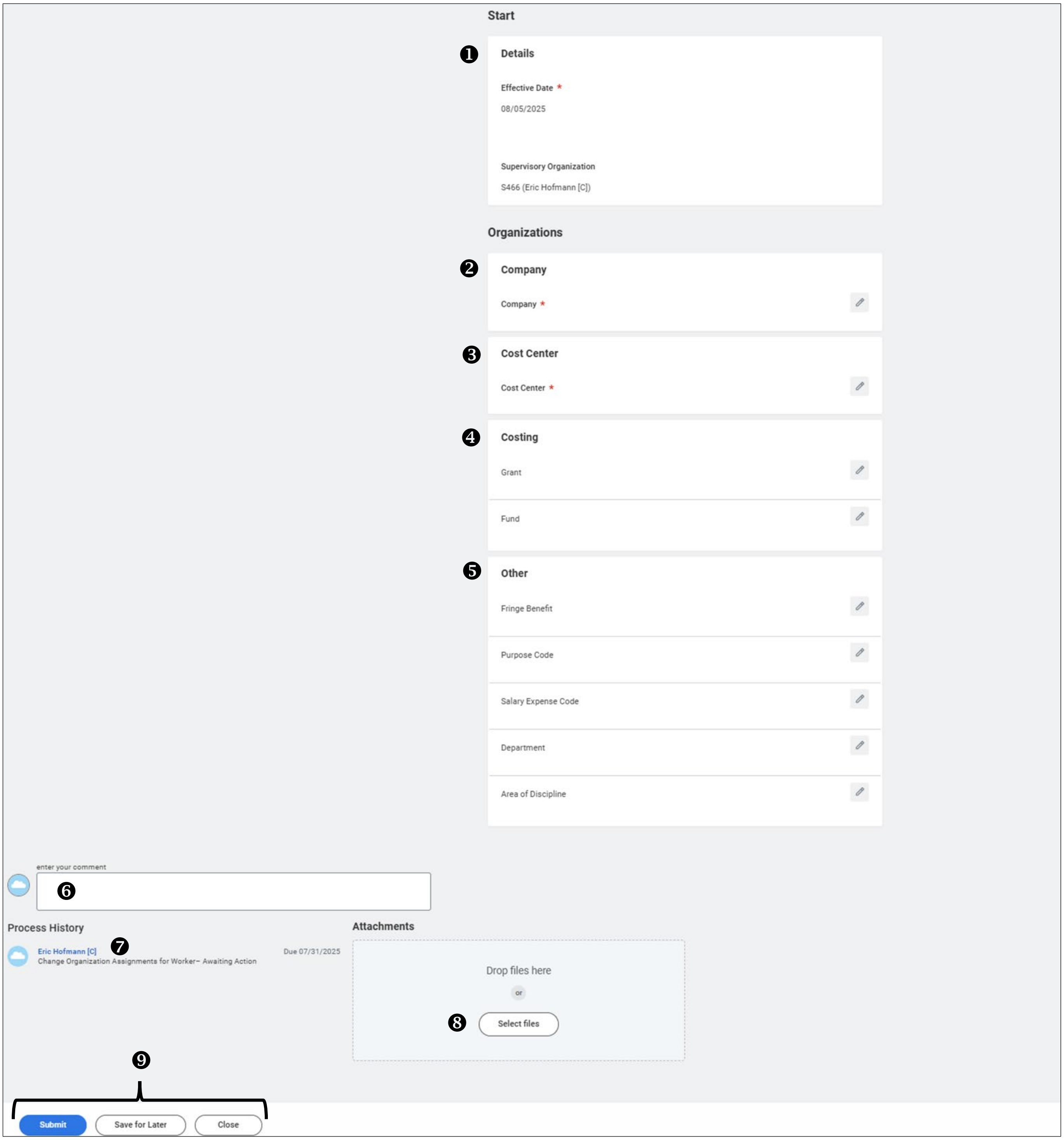


Figure 7

8. Understanding the **Change Organization Assignments.**

❶ **Start Details:** Includes the effective date and the PIs name.

❷ **Company:** Click the **Edit Pencil Icon,** and a **Search Box** will appear. Click in the **Search Box** and click on **Organizations** in the search box. There are two options to choose from: **LLC** or **RFCUNY**. Choose the appropriate company, which is **RFCUNY,** in our example. Next, click the **Check Mark** in the top right of the company box, and RFCUNY will be posted in the Company Box.

❸ **Cost Center:** Click the **Edit Pencil Icon,** and a **Search Box** will appear. Click in the **Search Box and** click on **Organizations** in the search box. Scroll through the list to choose your campus, or type the campus name in the search bar, and the campus will appear in the search box. Next, click the **Check Mark** in the top right of the company box, and the campus will be posted in the **Cost Center Box**.

❹ **Costing:** Click the **Edit Pencil Icon,** and a **Search Box** will appear. Click in the **Search Box and** click on **Organizations** in the search box. Scroll through the list to choose the Grant to determine the position's payment source, or type the grant name in the search bar, and the grant will appear in the search box. Next, click the **Check Mark** in the top right of the company box, and the grant will be posted in the **Cost Center Box**.

Fund: This field will prefill with the fund associated with the grant.

❺ **Other:** Click the **Edit Pencil Icon** and select the **Fringe Benefit** if the position falls into any of our **Special Fringes, i.e., F1/J1 Student, Fixed Fringe, or Sabbatical Leave,** then click the Check Mark in the top right of the box to complete the task. Click on the **Edit Pencil Icon** in each of the following categories and after your choice, click the **Check Mark** in the top right of the box to complete the task. Click on **Purpose Code,** and it will automatically prefill. Select the **Salary Expense Code** for the position (Currently, our 4-digit expense codes, such as 5480). **Department** will automatically prefill. When you click on **the Area of Discipline,** click on **Organizations,** and choose from the drop-down menu the area of discipline for your position.

❻ **Enter Comments**: Input any comments for requesting the position.

❼ **Process History**: An audit trail, showing the entire lifecycle of a process, from initiation to completion (or cancellation), offering transparency into workflow progress and enabling troubleshooting.

❽ **Attachments:** Attach any necessary documentation.

❾ **Submit**: You also have the option to **Save for Later** or **Cancel**.

After clicking **Submit**, a **Success! Event submitted** pop-up box will appear as shown in **Figure 8**, below.

9. Click on **Open** ❶ in **Figure 8** to go to the next required step, the **Compensation** window will appear seen in **Figure 9** on **Page 10.**

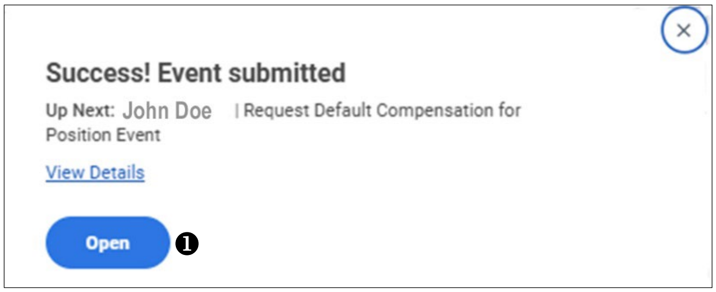


Figure 8

10. The **Compensation** window appears as shown in **Figure 9** below. Refer to **Page 10** for explanations of the titles in **Figure 9** below.

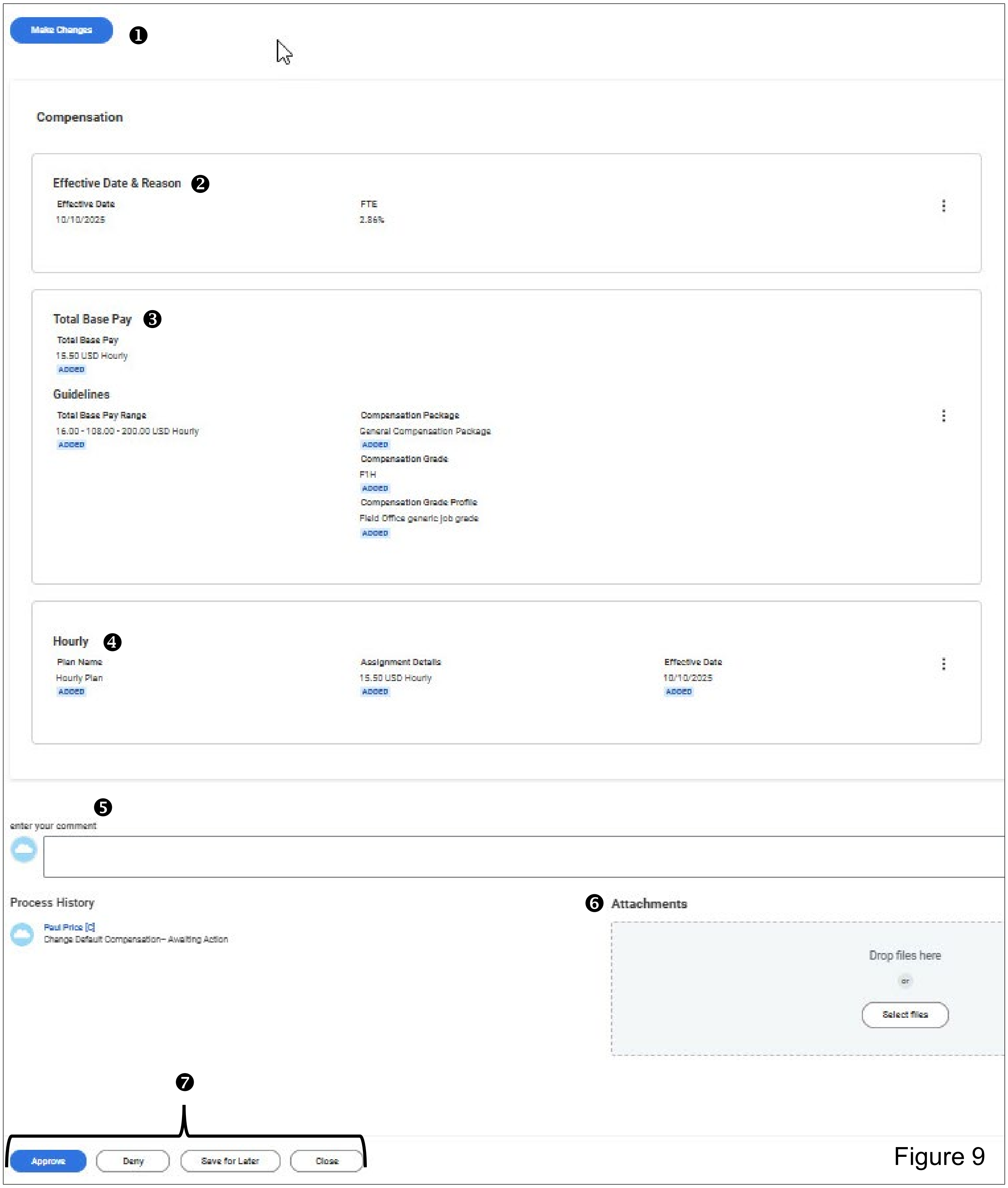


Figure 9

❶ **Make Change:** Allows you to make changes with the items listed below and save them.

❷ **Effective Date & Reason**: Click the Pencil Icon, and a Calendar Box will appear. Click the new effective date from the calendar and then click the Check Mark in the top right of the Effective Date & Reason box. Additionally, the FTE (Full-Time Employment) percentage will be shown. This percentage represents the ratio of an employee's scheduled hours to the standard full-time hours for the business site.

❸ **Total Base Pay**: Will automatically be prefilled.

❹ **Hourly**: Assignment Details, Plan Name, and Effective Date will be prefilled. Click the Pencil Icon to edit the hourly wage. The Compensation Plan pop-up box will appear as shown in **Figure 9** on **Page 12**.

❺ **Enter Your Comments:** Input any comments for requesting the position.

❻ **Attachments**: Attach any necessary documentation.

❼ **Submit:** After clicking Submit, a Success! Event submitted pop-up box will appear. You also have the option to **Save for Later** or **Cancel**.

Editing Hourly Plan

11. After clicking **Make Changes** as shown in **Figure 9** on **Page 10**, scroll down to **Hourly ❶**, then click on the **three dots ❷**, then choose **Edit ❸**. The Hourly window will open as seen in **Figure 11** on **Page 13**.

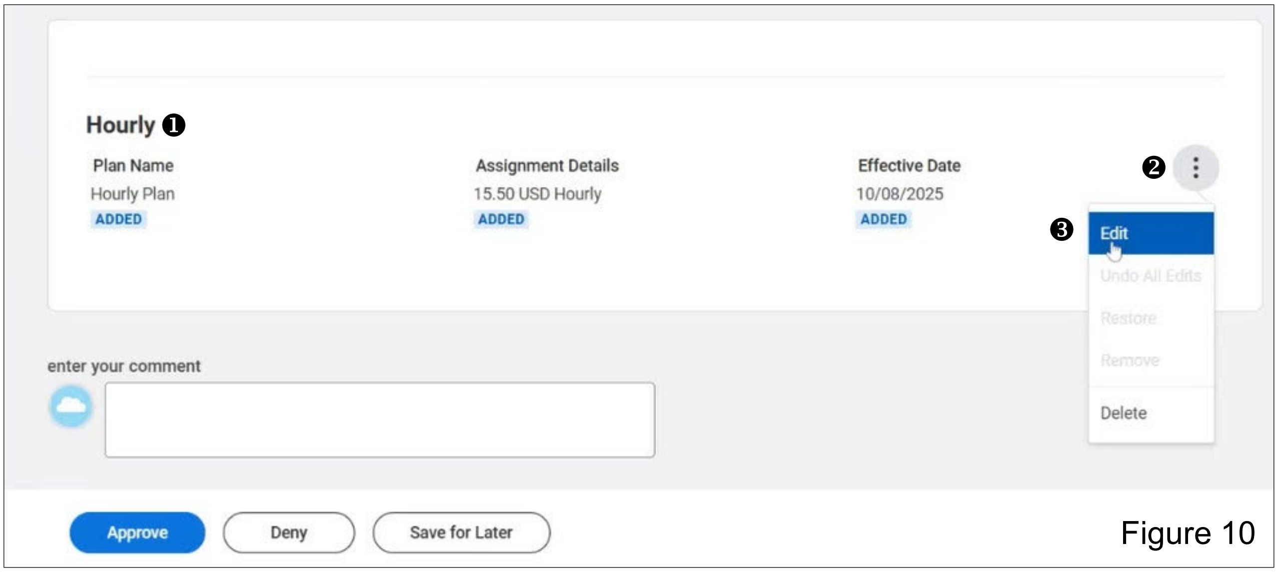
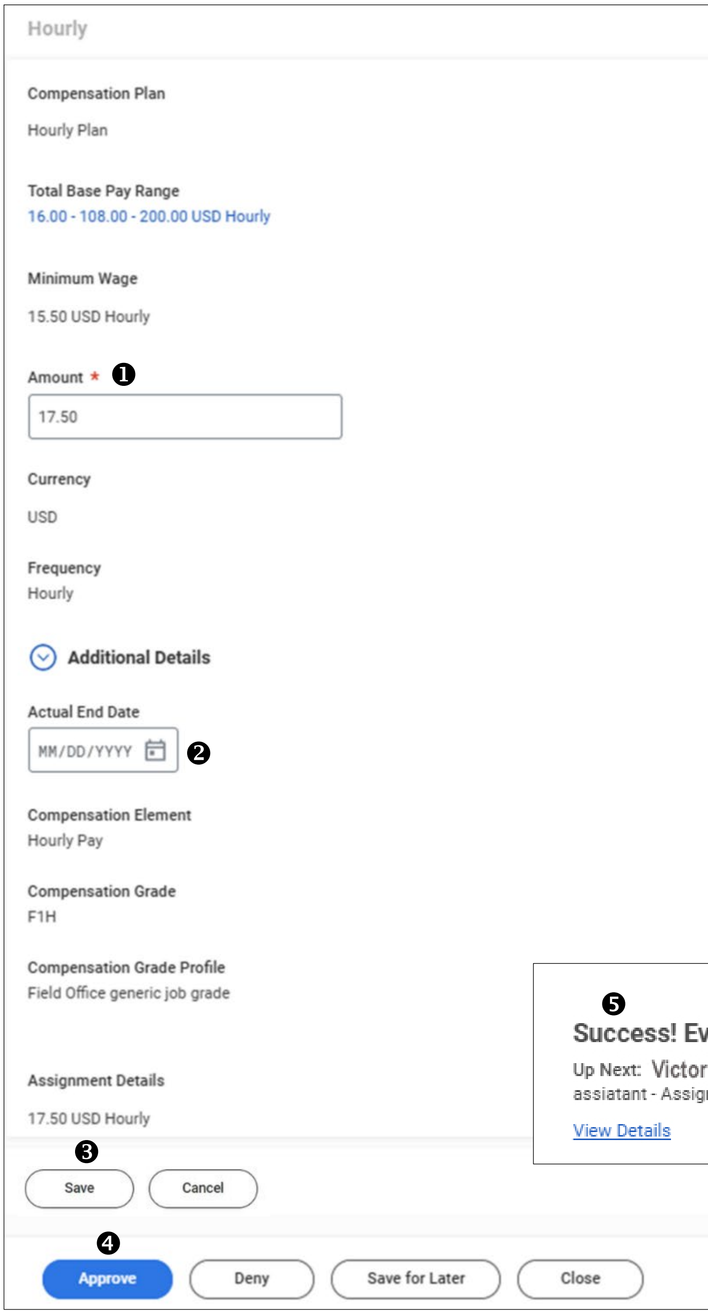


Figure 10

12. After entering the **Amount** ❶ and clicking **Actual End Date** ❷, then click **Save** ❸.

13. Click **Approve** ❹, a **Success! Event approved** ❺ pop-up box will appear as shown in **Figure 12** below.

    Please Note: The HR partner will then receive the position for approval.



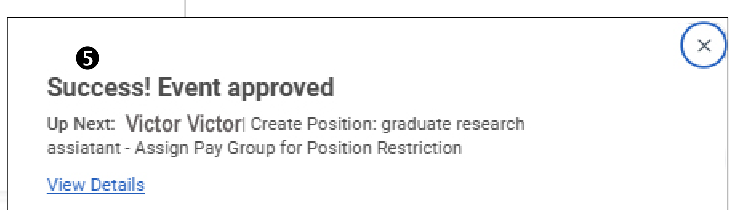


Figure 12

Figure 11

After the HR partner has approved the position, you can go into **My Task** ❶, click on **Archive** ❷, and be able to see that your position has been **approved** ❸.

The next step is to create a **Job Requisition**.

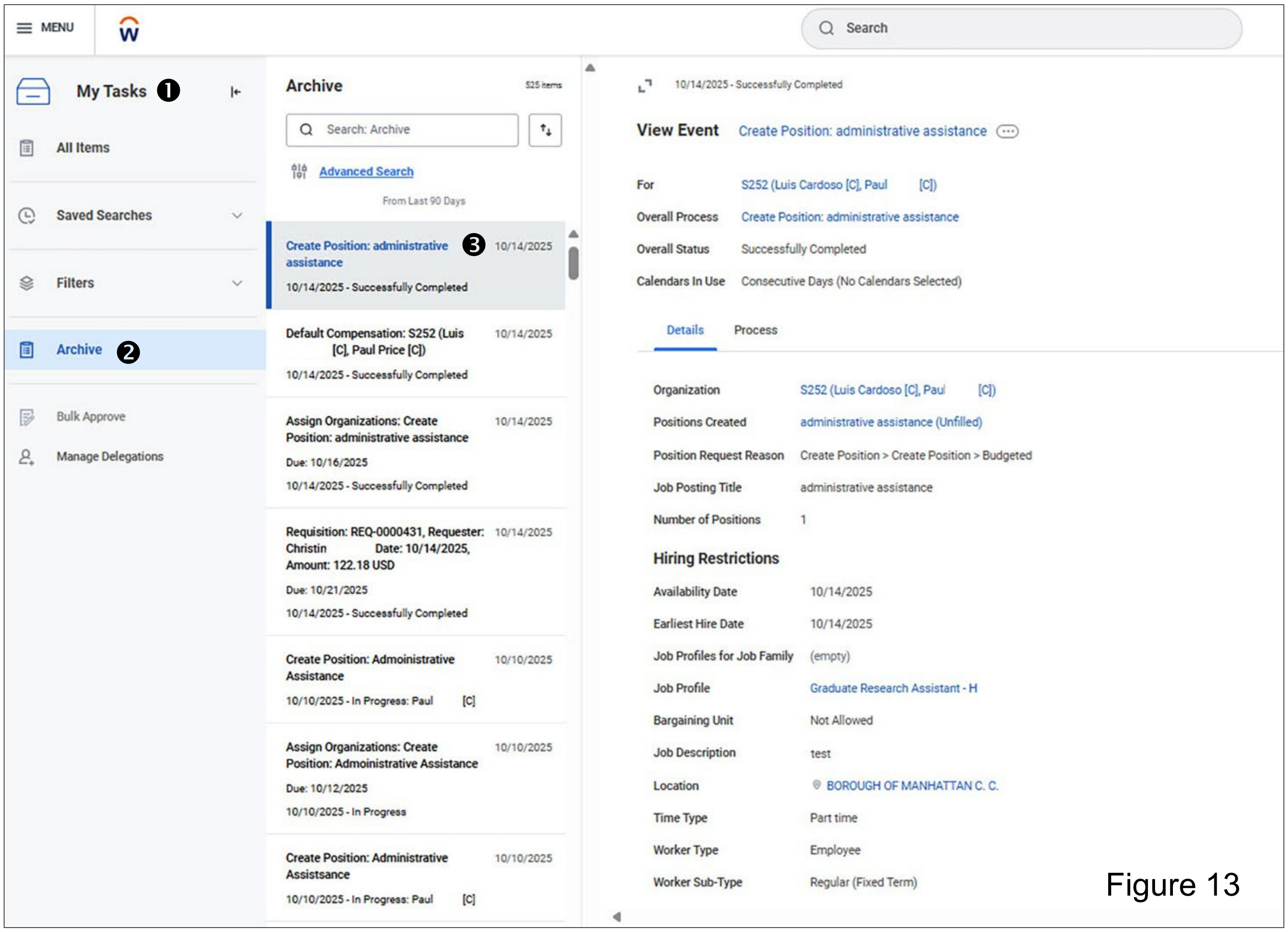


Figure 13