Sysco®
At the heart of food and service

workday®

Manager Job Aid

ORGANIZATIONAL / POSITION MANAGEMENT

NOTE: WORKDAY IS CONSTANTLY UPDATING THEIR TOOLS, SO THIS JOB AID MAY NOT REFLECT EXACTLY WHAT YOU SEE IN WORKDAY.

Organizational / Position Management

VIEWING OPEN POSITIONS IN YOUR ORGANIZATION

Before creating a new position, make sure you don't already have open positions.

1. Click the **My Open Positions** icon on the home page.

My Open Positions

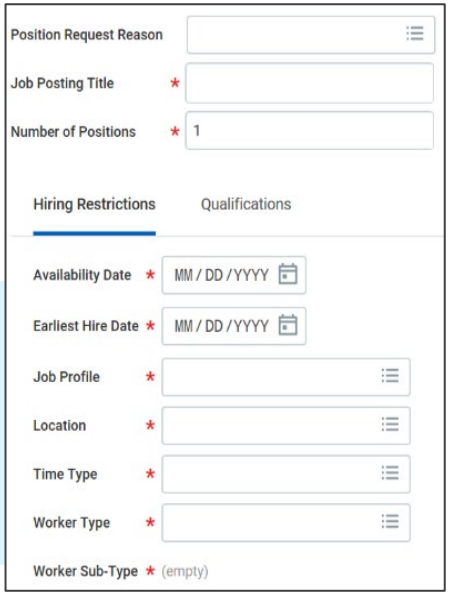
2. Choose your Organization.
3. If you want to view all subordinate positions in addition to your selected Organization, check the **Include Subordinate Organizations** box.
4. If you need to create a new position, follow the instructions in the next section.

Important: You're not finished until you complete all steps and click **Submit** for the second time.

CREATING A NEW POSITION

A position is a unique "chair" or open seat within your Supervisory Organization. A position can be filled after opening a job requisition for that position. You may need to create a new position for your team due to increased headcount or an increase in your budget.

1. Type **create position** into the search bar.
2. Click **Create Position** in the search results.
3. Your Supervisory Organization will be auto-filled, but you can change it if necessary.
4. Click **OK**.
5. Fill in the position information and hiring restrictions. Ignore the Qualifications tab.



NOTES:

Job Posting Title: Type *EXACTLY* the same name as the Job Profile.

Availability Date is when the position is available to be seen and is effective in Workday.

Earliest Hire Date is when the position can be filled. You cannot hire before this date.

6. Click **Submit**.
7. Click the **Open** button in the **Up Next** section. (Or click **Done** and complete the rest of the process from your Inbox later.)
8. In the Organizations section, review the **Company** and **Cost Center** details. If you need to make changes, click the Edit icons.
9. Change the **Organization Assignments** (if necessary).
10. Click **Submit**.

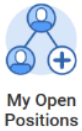
NOTE: Additional approvals are required. You can view approval status in your Inbox Archive.

Organizational / Position Management

EDITING POSITION RESTRICTIONS

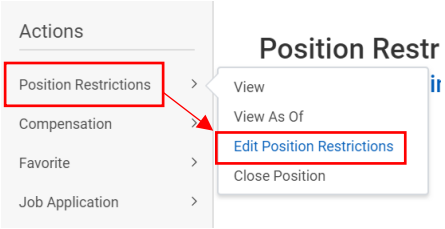
If a position a) has been approved, b) needs to be changed, c) does not have an open job requisition (you must close the requisition first) and d) there isn't an associate occupying it, follow these steps to edit the position restrictions:

1. Click the **My Open Positions** icon on the home page.

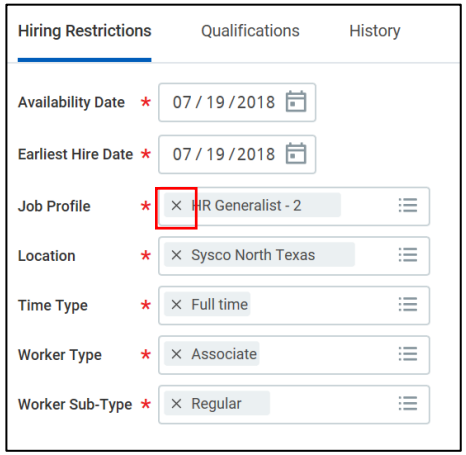


2. Place your cursor over the position you wish to change and click the **Actions** button next to it.

3. Select **Position Restrictions** > **Edit Position Restrictions**.

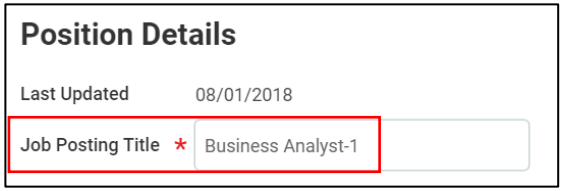


4. In the **Job Profile** field, click the "x" to remove the profile.



5. Select a new Job Profile.

6. Scroll back up to the Position Details section and enter the new **Job Posting Title**. It must match the new Job Profile exactly.



7. Change the **Availability** and **Earliest Hire Date**, if necessary.

8. Click **Submit**.

9. Change (if necessary) the **Organization Assignments**.

10. Click **Submit**.

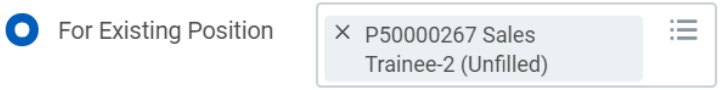
NOTE: Additional approvals are required. You can view approval status in your Inbox Archive.

Organizational / Position Management

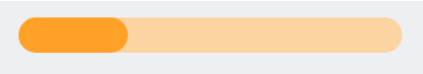
CREATING A NEW JOB REQUISITION

A job requisition can be created ***only after a position has been created and approved***.

1. Type **Create Job Requisition** into the search bar.
2. Click **Create Job Requisition** in the search results.
3. Your Supervisory Organization will be auto-filled.
4. Click the box next to **For Existing Position**, then select the position you're creating a requisition for.



5. Select the **Worker Type**.
6. Click **OK**.
7. An orange progress bar displays near the top of the page to guide you through the process.



8. Click **Next** to move through the sections. Or, click **Summary** to edit using a single-page view.

NOTE: Job Profile, Location, Cost Center, Company and Posting Title are defaulted to your Organization.

9. On the **Assign Roles** page, click **Add**.
10. In the **Role** field, select **Primary Recruiter**.
11. In the **Assigned To** field, click **Allowed Assignees**, then select a recruiter.
12. Click **Next**.
13. Review the job requisition, then click **Submit**.
14. Open the next tab and set the **Target Compensation**.
15. Review and click **Submit**.

NOTE: Additional approvals are required. You can view approval status in your Inbox Archive.

Organizational / Position Management

CREATING A NEW JOB REQUISITION (CONTINUED)

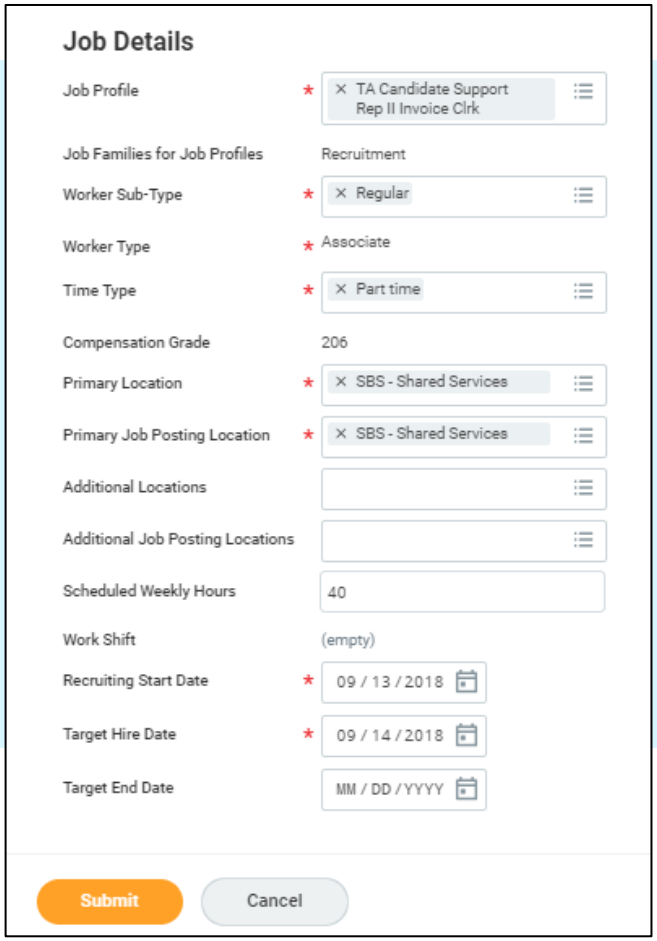
JOB DETAILS FIELDS

Recruiting Start Date: Select the date you wish your TAP to receive the Job Requisition in SuccessFactors Recruiting and begin recruiting.

- If a future date is selected, the Job Requisition will not import into SuccessFactors Recruiting and the TAP will not be able to see the requisition until that date.

Target Hire Date: Select the date you are targeting the new hire to start. This date imports into the Target Start Date field in the SuccessFactors Recruiting requisition. This date is discussed during the intake call and is editable in SuccessFactors Recruiting.

Target End Date: Do not use this field for associate positions. (See the *Contracting a Contingent/Non-Employee Worker* section).



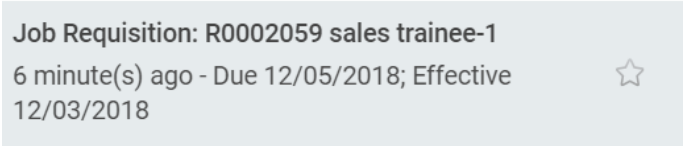
Organizational / Position Management

EQUIPMENT PROVISIONING AFTER JOB REQUISITION

Once a job requisition has been approved, the manager will receive an Inbox item to complete the Equipment Provisioning.

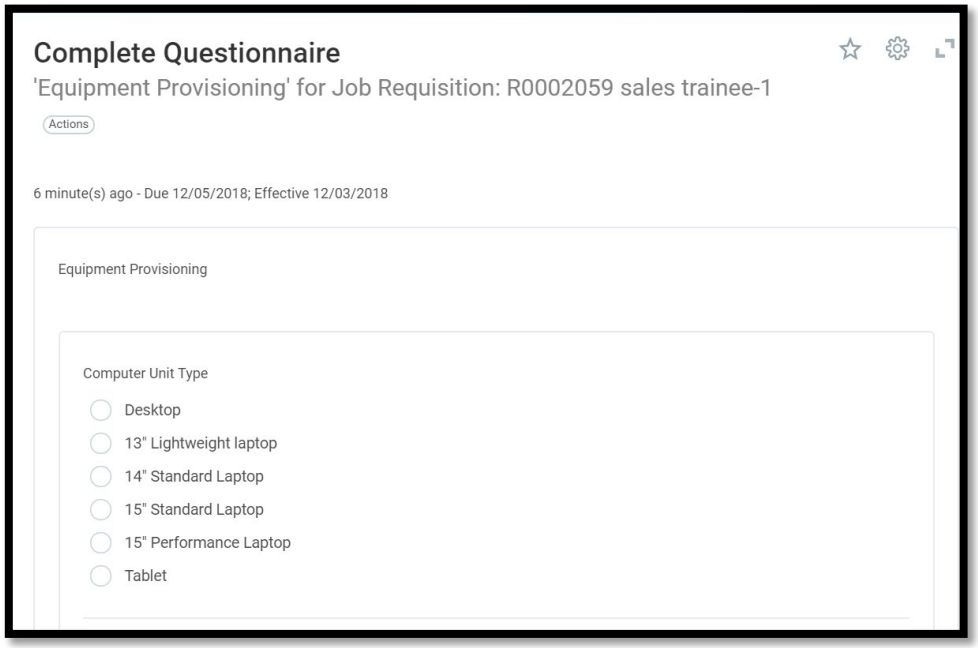
1. Go to your Inbox.

2. Open the task for the new job requisition.



3. Complete the Equipment Provisioning Questionnaire.

4. Click **Submit.**



NOTES:

If no equipment is required, just click **Submit** without selecting any options.

If an associate's Job Profile is Outbound Selector or Driver, you will not receive this Inbox task.

Organizational / Position Management

CLOSING A JOB REQUISITION

Once they are created, job requisitions cannot be edited. They can only be closed.

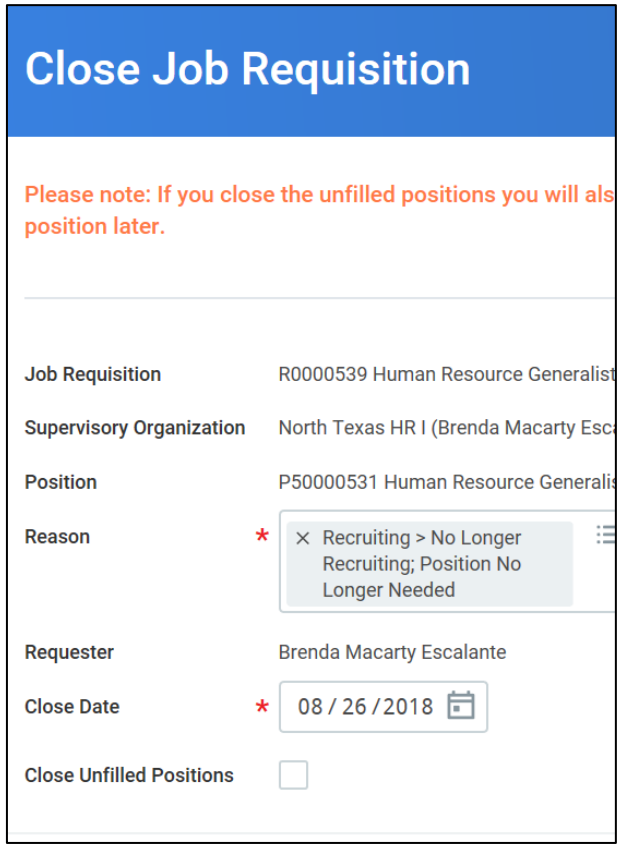
You can close a job requisition without closing the position.

1. Click the **My Open Job Requisitions** icon on the home page.

My Open Job Requisitions

2. Place your cursor over the requisition you wish to close.
3. Click the **Actions** button next to it. 
4. Select **Job Change** > **Close Job Requisition**.

5. Select a **Reason**.
6. Enter the **Close Date**.
7. Click **Submit**, then **Done**.



NOTE: Your TAP (Talent Acquisition Partner) must approve the change before the process is complete.

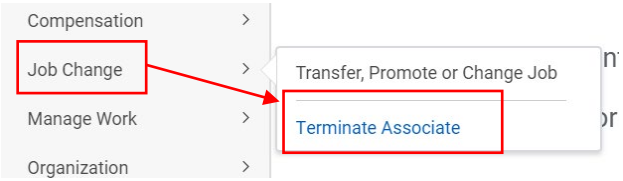
Organizational / Position Management

TERMINATION

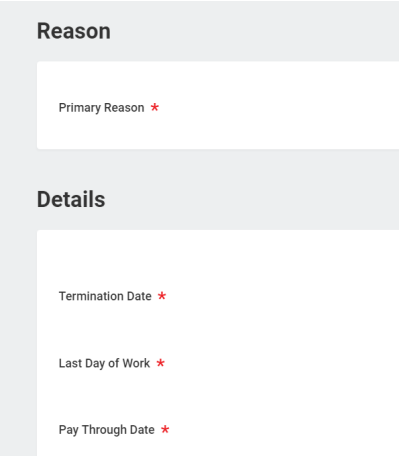
You may have to terminate an associate after he/she has been asked to leave or has resigned.

1. Go to the associate's profile.
2. Click the **Actions** button.

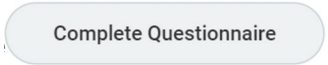
3. Select **Job Change** > **Terminate Associate**.



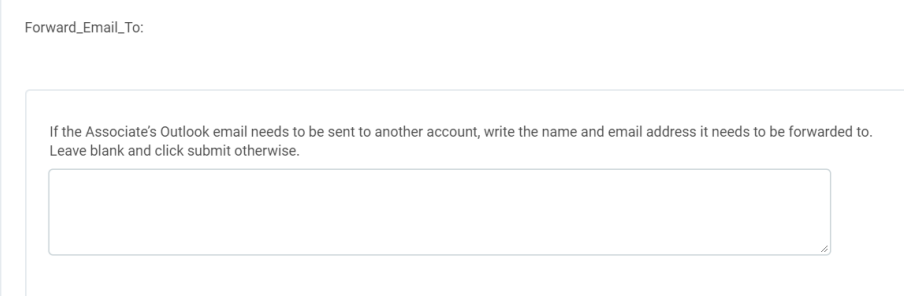
4. Fill in the **Primary Reason**, **Termination Date** and other required details.



5. Fill in the **Primary Reason**, **Termination Date** and other required details.
6. Indicate whether the position is to be closed or is available for overlap after this termination. Position overlap allows a replacement worker to be hired into the same position before the current associate leaves.
7. Click **Submit**.
8. If the associate has access to a Sysco email account, click **Complete Questionnaire** and answer the questions.



9. If question #4 applies, enter the name and email address of the person the terminated associate's email address should be forwarded to.



10. Click **Submit.**

NOTE: The associate is still considered active until midnight on the termination date.

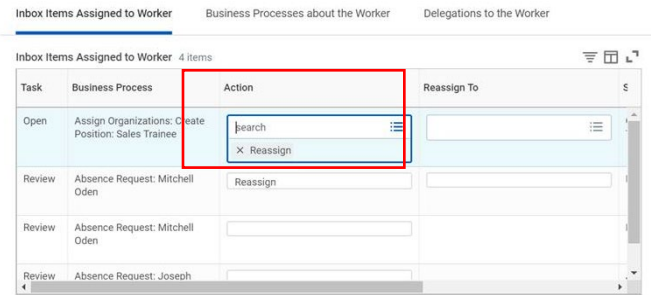
UNION REINSTATEMENTS: If an associate is being reinstated after a union grievance, contact Support to "Rescind Termination" so the associate's termination does not reflect in his or her history and the I-9 process does not initiate.

Organizational / Position Management

MANAGING BUSINESS PROCESSES AFTER TERMINATION

If a manager has Inbox tasks that were not completed before termination, the manager's manager will receive an Inbox task called "Manage Business Process."

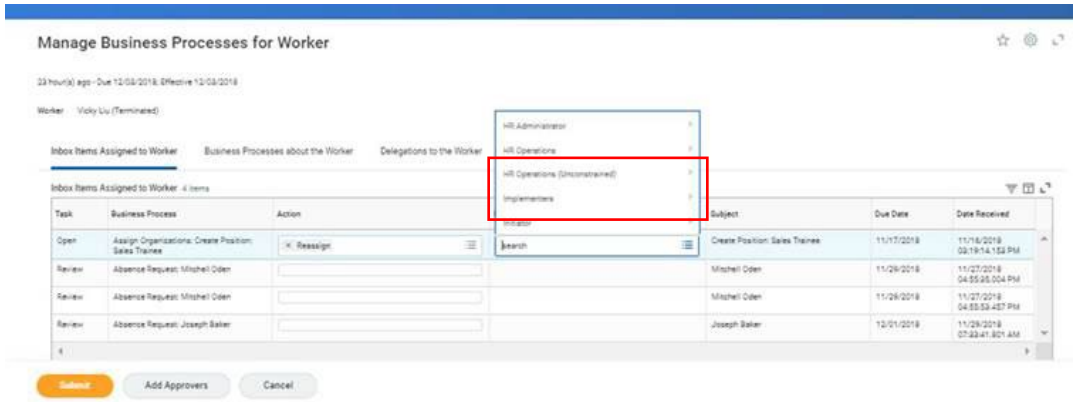
1. Go to the Inbox.
2. Open the "Manage Business Process" task for the terminated associate.
3. For each business process, click the box in the **Actions** column and select an option: Reassign or Cancel.



If you select **Reassign**, you can assign the task to yourself or someone else.

If you select **Cancel**, the task will be cancelled. If a task is cancelled, the initiator must restart from the beginning. For example, if you cancel an Absence Request, the initiator must request the time off again.

4. If you are reassigning the task, click the box in the **Reassign To** column and select the name of the person (yourself or someone else in the management chain for that position) who will inherit the task.



NOTE: If you are reassigning a task to someone other than yourself, you must select someone else in the management chain for that position.

If an associate is a No Show, you will receive their onboarding steps in your Inbox. Make sure to cancel all steps.

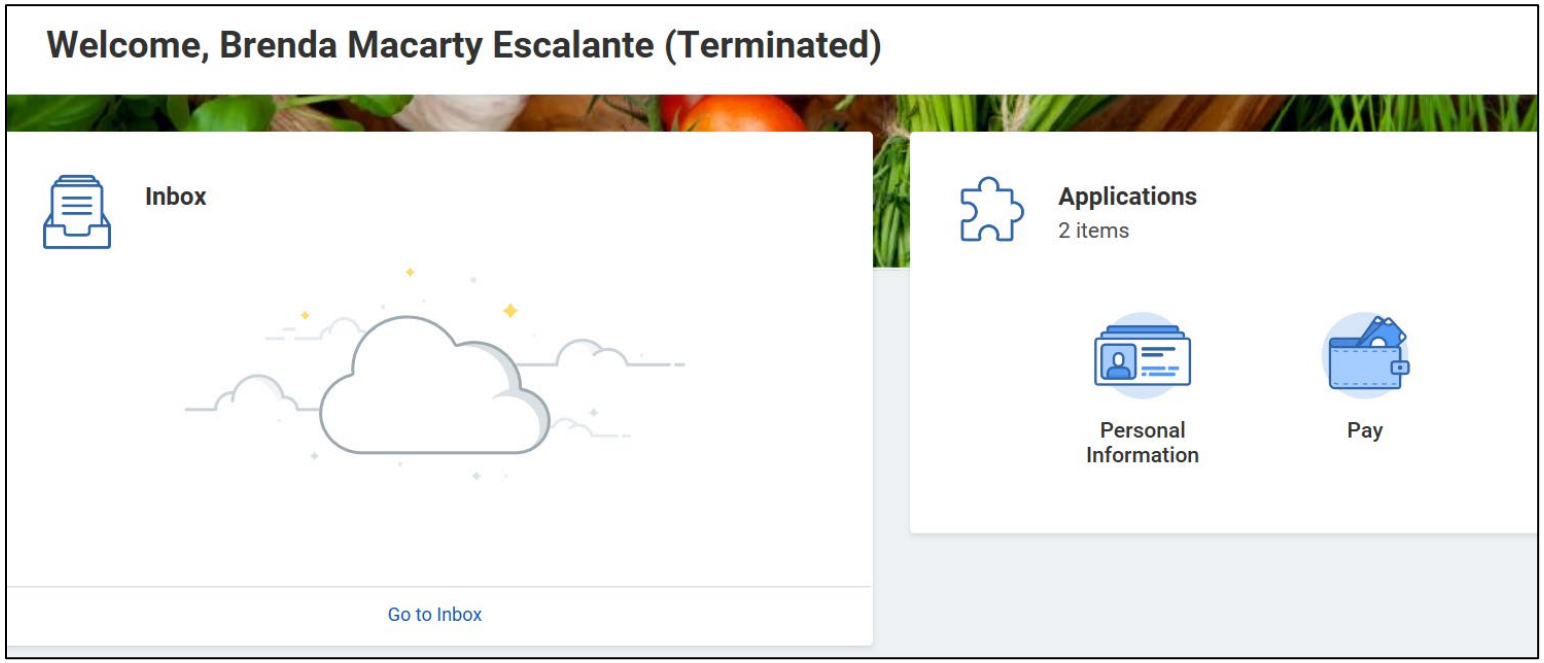
5. Click **Submit**.
6. If you reassigned tasks to yourself, you will find those tasks in your Inbox.

Organizational / Position Management

View of Workday for a Terminated Associate

An associate who has been terminated will continue to have limited access to Workday. The access will end on April 15 of the year following the termination.

Terminated associates will only be able to change their personal information and payment options.



View of Workday for a Terminated Associate

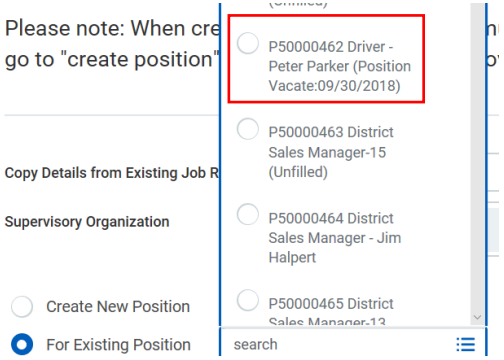
NOTE: An associate will continue to have full access to Workday for 24 hours after the date of termination. The associate will receive an email with a new password as part of the termination process. Contact Support if access needs to be revoked immediately.

Organizational / Position Management

POSITION OVERLAP

If an associate has a future-dated termination, you can create a requisition and hire someone into that same position.

1. Type **create job requisition** into the search bar.
2. Click **Create Job Requisition** in the search results.
3. Your Supervisory Organization will be auto-filled.
4. Click the box next to **For Existing Position**, then select the position of the departing associate.



5. **Worker Type** will be auto-filled.
6. Click **OK**.
7. Workday will display the name of the associate who will be replaced.

8. Click **Next** to move through the sections. Or, click **Summary** to edit using a single-page view.

> **NOTE:** Job Profile, Location, Cost Center, Company and Posting Title are defaulted to your Organization.

9. On the **Assign Roles** page, click **Add**.
10. In the **Role** field, select **Primary Recruiter**.
11. In the **Assigned To** field, click **Allowed Assignees**, then select a recruiter.
12. Click **Next**.
13. Review the job requisition, then click **Submit**.
14. Open the next tab and set the **Target Compensation**.
15. Review and click **Submit**.

> **NOTES:**
> Additional approvals are required. You can view approval status in your Inbox Archive.
>
> While you are able to create a requisition for an associate who does not have a future termination, no one can be *hired* into the same seat as an associate who has not been scheduled for a termination or transfer.

Organizational / Position Management

CONTRACTING A CONTINGENT/NON-EMPLOYEE WORKER

Hiring a contingent/non-employee worker can be done **only** after a position has been created and approved. Sysco guidelines and policies for contingent workers must be followed. Check with your HRBP before you begin this process.

1. Type **Contract Contingent Worker** into the search bar.
2. Click **Contract Contingent Worker** in the search results.

   Contract Contingent Worker

3. Your Supervisory Organization will be auto-filled.
4. Click the button next to **Create a New Pre-Hire**, then select the position you're creating a requisition for.

   Create a New Pre-Hire

5. Click **OK**.
6. Enter the first and last name of the contingent/non-employee worker.
7. Click **Contact Information** and enter a phone number or an email address. You can enter "9999" in the phone number tab if no information is available.
8. Click **Next**.
9. Enter the **Contract Start Date**.
10. Enter the reason for the contract.
11. In the **Position** field, select **Positions Without Requisitions**.
12. Select the position you created for this worker.
13. **Contingent Worker Type**, **Job Profile**, **Time Type** and **Location** will be auto-filled from the position.
14. Enter the **Contract End Date**.

    NOTE: Contract end date cannot be more than twelve months after start date.

15. Click **Submit**.
16. If the contractor already has a Network ID (current), click on **Edit Additional Data**.

    Edit Additional Data

17. Enter the current Network ID.

    NOTE: Steps 16 & 17 only apply if the Contingent Worker already has a Network ID. You can skip the step if this is not applicable.

Organizational / Position Management

ENDING A CONTINGENT WORKER'S CONTRACT/TERMINATING A NON-EMPLOYEE WORKER

You can terminate the contingent/non-employee worker by ending the worker's contract.

1. Type **end contingent worker contract** into the search bar.
2. Click **End Contingent Worker Contract** in the search results.

   End Contingent Worker Contract

3. Search for and select the worker's name in the **Contingent Worker** field.

   Contingent Worker * × Stanley Hudson [C]

4. Click **OK**.
5. Enter the **Contract End Date** and the **Reason**.

   Contract End Date * 09 / 30 / 2018

   Reason * × End Contingent Worker Contract > End of Temp Assignment

6. If you don't need the position anymore, check the **Close Position** box.

   Close Position

   If you plan to refill the position in the future, you can leave it open.

7. If you plan to overlap the position (hire a replacement before the Contract End Date), check the **Is this position available for overlap?** box.

   Is this position available for overlap?

8. Click **Submit**.

   Submit

NOTE: If the contingent worker is moving to a regular Associate position, the contract must end at least one day prior to the start date.