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 an open position(s).

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

My Open Positions

2. You will see a list of all open positions in your Supervisory Organization, including your subordinate organizations.

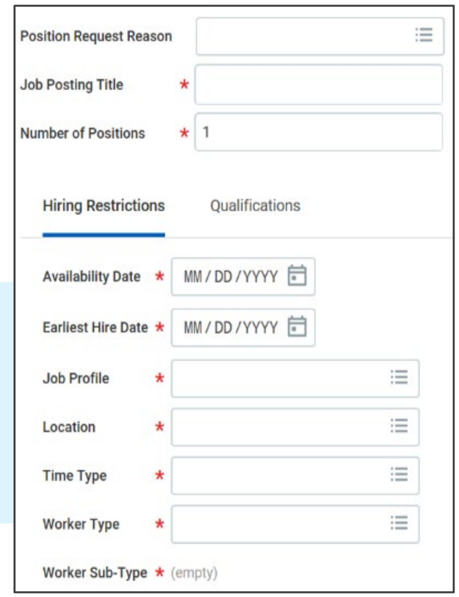
If you need to create a new position, follow the instructions in the next section.

**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:**

**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. **The accuracy of this information is critical.** If you need to make changes, click the **Edit** icons.
9. Change the **Organization Assignments** (if necessary).
10. Click **Submit**.

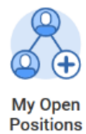
**NOTE:** Additional approvals may be required. You can view approval status in your Inbox Archive.

# Organizational / Position Management

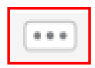
## EDITING POSITION RESTRICTIONS

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:

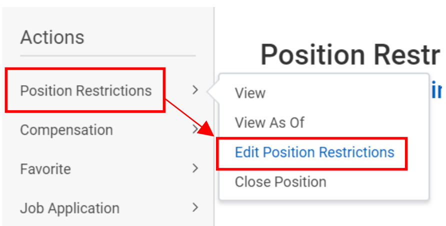
1. Click the **My Open Positions** icon on the home page.



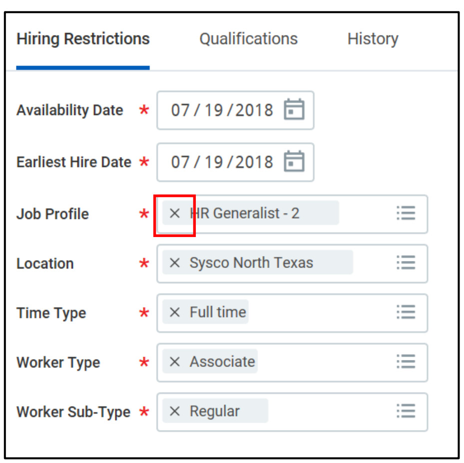

2. Place your cursor over the position you wish to change and click the **Actions** button next to it.



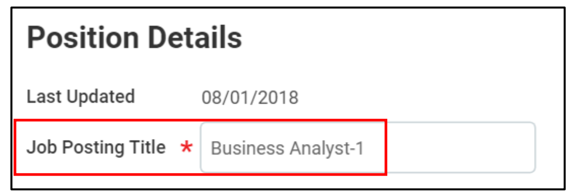
3. Select **Position Restrictions** > **Edit Position Restrictions**.




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.**




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.

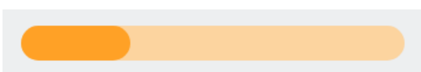
# Organizational / Position Management

## CREATING A POSITION WITH A JOB REQUISITION

If you prefer, you can create a position at the same time you create a job requisition.

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 **Create New Position**.


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, completing all required fields.
9. The Summary page shows all requisition details. Review, then click **Submit**.
10. If this is a high-volume role (driver or outbound selector), no approvals are required at this stage.

    If this is a non-high-volume role, the position and requisition will be routed for approval. You can track approval status in your Inbox Archive.

11. For many jobs, you will receive a **Manager Intake Questionnaire** in your Inbox. The questionnaire **must** be completed before the job can be posted.

**NOTES:**

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

If this is a high-volume role (driver or outbound selector), you may create multiple positions with this requisition. Otherwise, you can only create one position per requisition.

The **Recruiting Start Date** is the date you wish your TAP to begin recruiting.

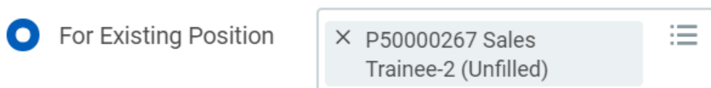
The **Target Hire Date** is the date you are targeting the new hire to start.

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

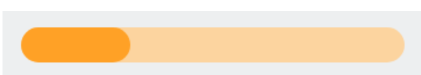
## CREATING A JOB REQUISITION FOR AN EXISTING POSITION

If you already have an approved, open position, you can select it during the job requisition process.

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. The Summary page shows all requisition details. Review, then click **Submit**.
9. If this is a high-volume role (driver or outbound selector), no approvals are required at this stage.

   If this is a non-high-volume role, the position and requisition will be routed for approval. You can track approval status in your Inbox Archive.
10. For many jobs, you will receive a **Manager Intake Questionnaire** in your Inbox. The questionnaire must be completed before the job can be posted.

**NOTES:**

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

The **Recruiting Start Date** is the date you wish your TAP to begin recruiting.

The **Target Hire Date** is the date you are targeting the new hire to start.

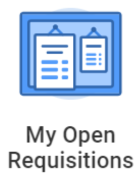
Do not use the **Target End Date** field for associate positions. (See the *Contracting a Contingent/Non-Employee Worker* section).

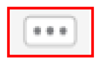
# Organizational / Position Management

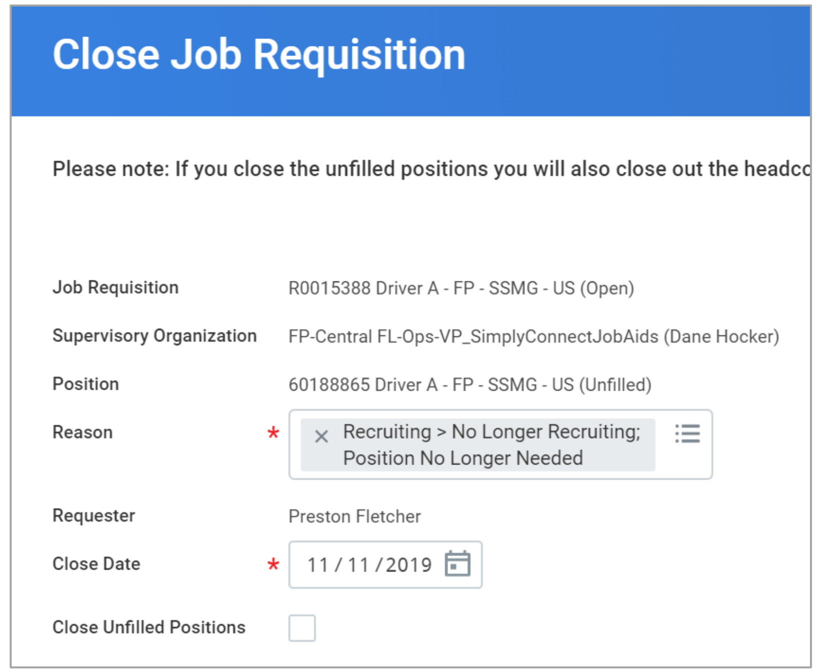
## CLOSING A JOB REQUISITION

If you end up not needing a job requisition, you can close it without closing the position associated with it.

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




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**.

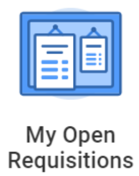
**NOTE:** Your TAP (Talent Acquisition Partner) must approve the change before the process is complete.

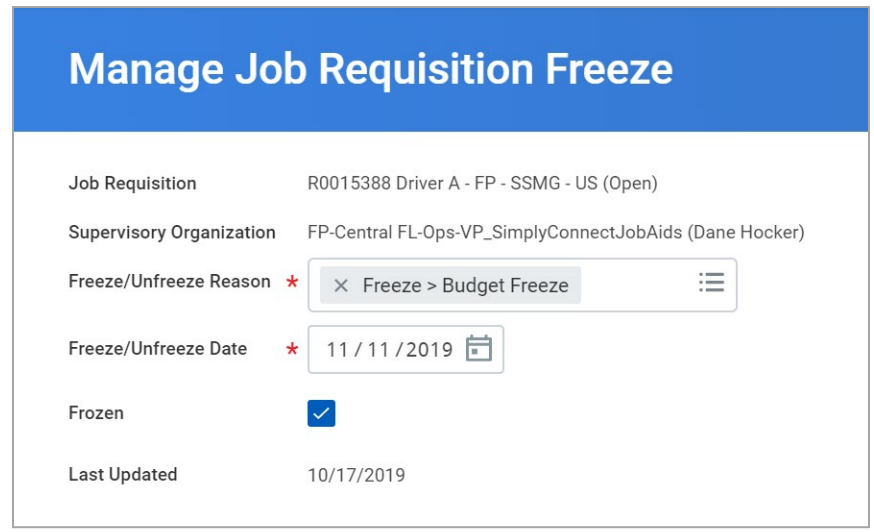
# Organizational / Position Management

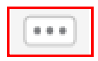
## FREEZING A JOB REQUISITION

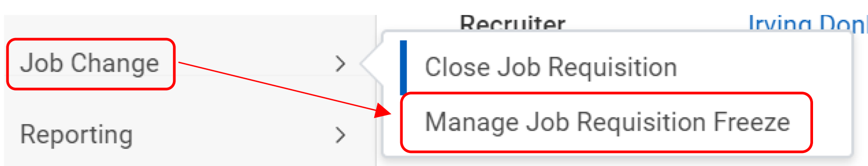
To temporarily suspend a job requisition during a budget freeze, you can freeze it.

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




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




5. Select a **Freeze/Unfreeze Reason**.
6. Enter the **Freeze/Unfreeze Date**.
7. Check the **Frozen** box.

## UNFREEZE A JOB REQUISITION

When you are ready to unfreeze the requisition, follow the same steps as above but uncheck the **Frozen** box.

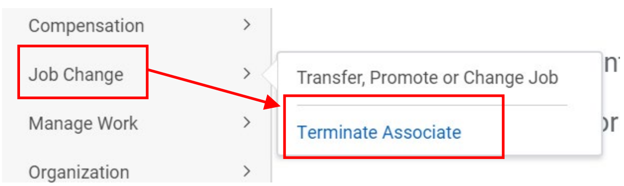
# Organizational / Position Management

## TERMINATION

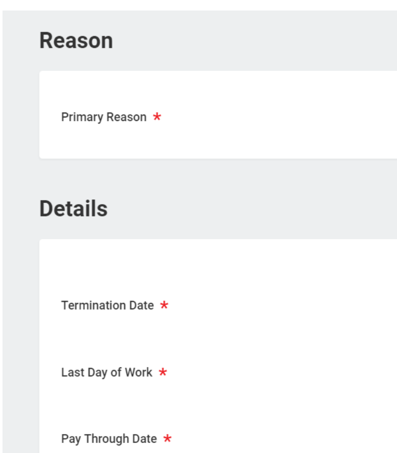
You may have to terminate an associate after he/she has been asked to leave or has resigned.

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

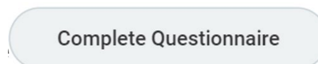

3. Select **Job Change** > **Terminate Associate**.



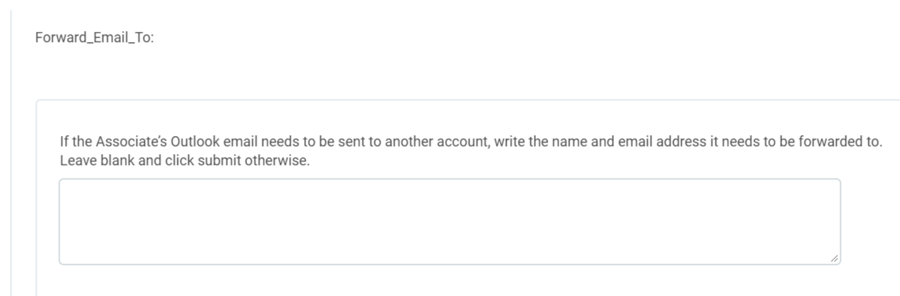

4. Fill in the **Primary Reason**, **Termination Date** and other required details.




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.

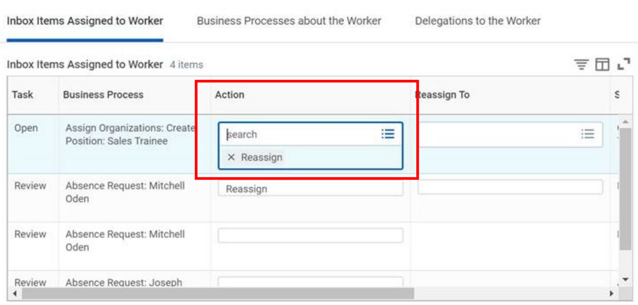
**UNION REINSTATEMENTS:** If an associate is being reinstated after a union grievance, contact Support to "Rescind Termination" so the associate's termination does not reflect in his or her history and the I-9 process does not initiate.

# 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."

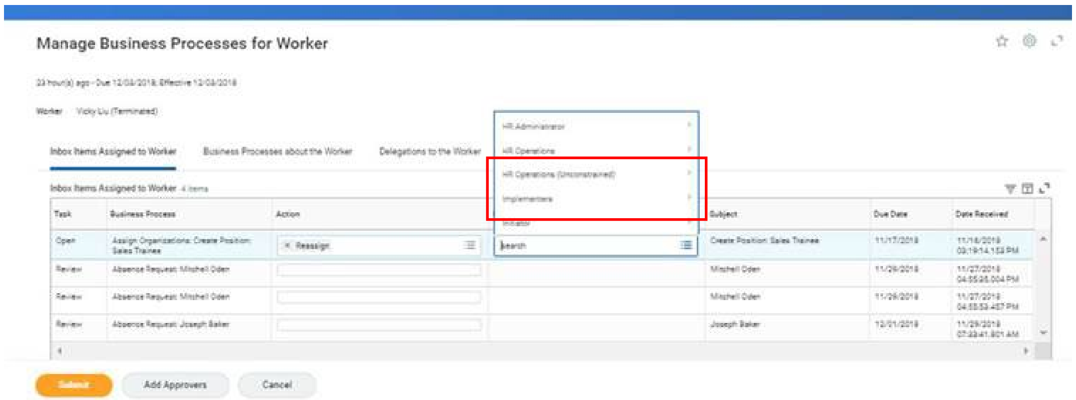
1. Go to the Inbox.
2. Open the "Manage Business Process" task for the terminated associate.
3. For each business process, click the box in the **Actions** column and select an option: **Reassign** or **Cancel**.




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. You may only reassign tasks to people with the security access/permissions to perform 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. You may only reassign tasks to people with the security access/permissions to perform the task.

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

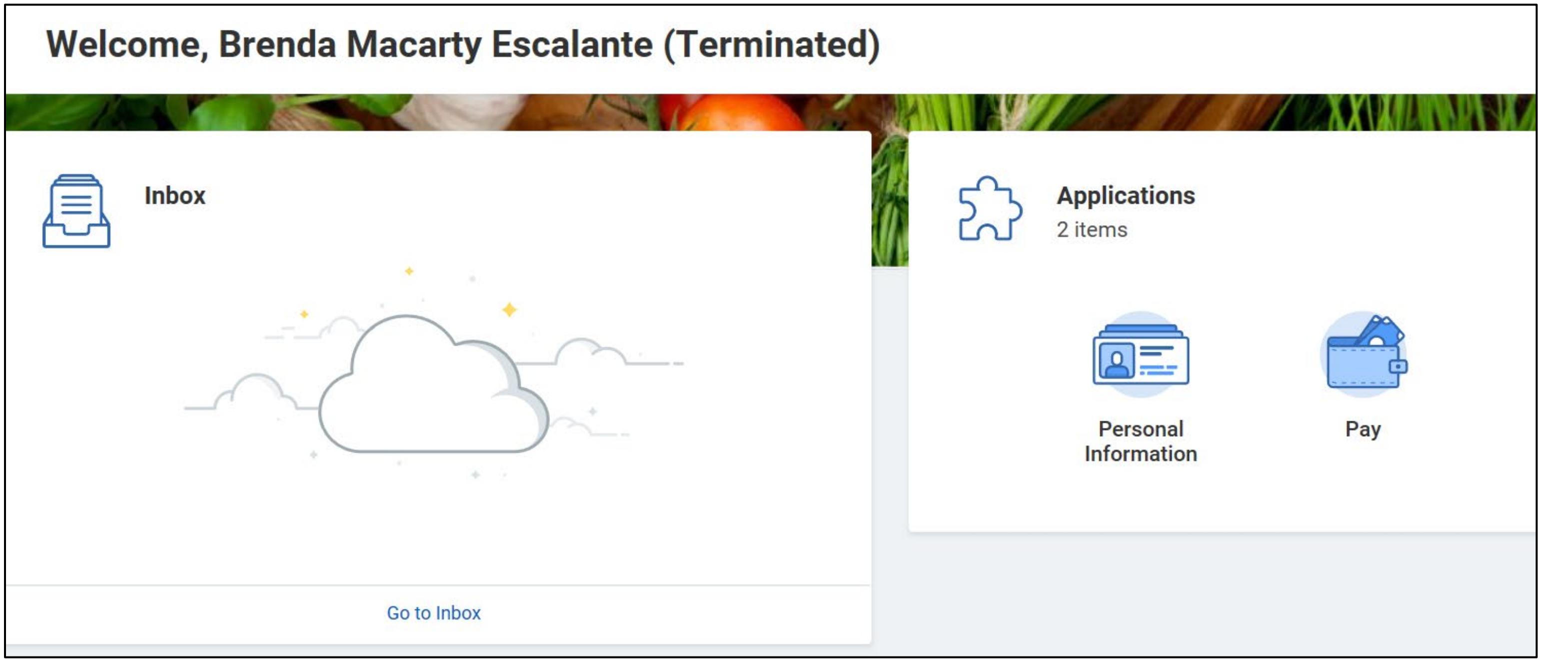
5. Click **Submit**.
6. If you reassigned tasks to yourself, you will find those tasks in your Inbox.

# 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

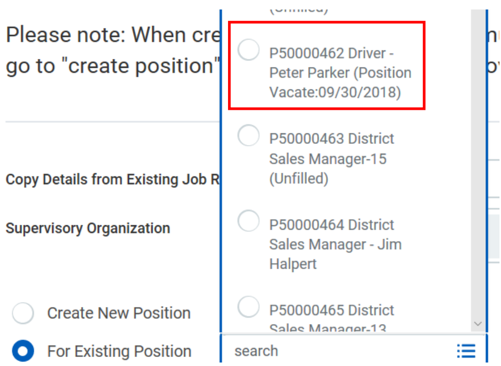
**NOTE:** An associate will continue to have full access to Workday for 24 hours after the date of termination. The associate will receive an email with a new password as part of the termination process. Contact Support if access needs to be revoked immediately.

# Organizational / Position Management

## POSITION OVERLAP

If an associate has a future-dated termination and the overlap option was selected during the termination process, 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.

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

9. The Summary page shows all requisition details. Review, then click **Submit**.
10. If this is a high-volume role (driver or outbound selector), the job requisition will go straight to the primary recruiter for posting.

    If this is a non-high-volume role, the position and requisition will be routed for approval. You can track approval status in your Inbox Archive.

> **NOTES:**
> Additional approvals may be 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.


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.


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 **OK**.
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**.


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.

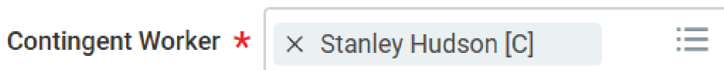
# Organizational / Position Management

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

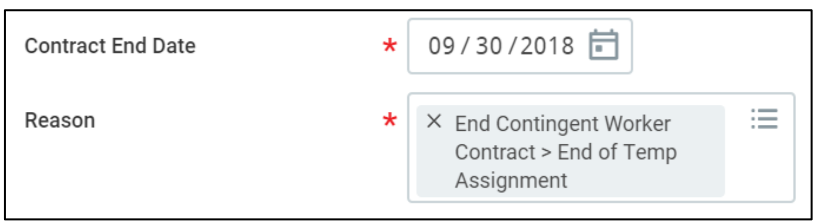
You can terminate the contingent/non-employee worker by ending the worker's contract.

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


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



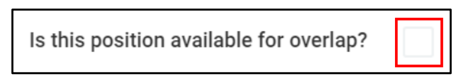

4. Click **OK**.
5. Enter the **Contract End Date** and the **Reason**.




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


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.




8. Click **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.

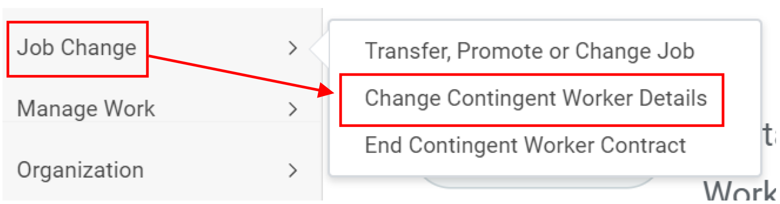
# Organizational / Position Management

## EXTENDING A CONTINGENT WORKER'S CONTRACT

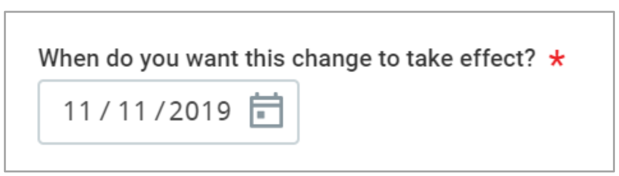
You can extend a contingent/non-employee worker's contract by editing the contract end date.

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


3. Select **Job Change** > **Change Contingent Worker Details**.

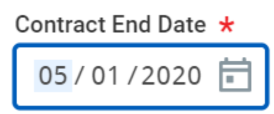



4. Fill in today's date in the **When do you want this change to take effect?** field.




5. In the **Why are you making this change?** field, select *Admin*, then *Edit CW Contract End Date*.


6. Click **Start**.
7. Edit the **Contract End Date**.




8. Click **Next**.
9. Review your changes, then click **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.