

# Recruiter: Create a Position



## Create a Position

Create Position is used to create a new position in Workday that has been approved by the President and the Office of Budget and Planning. Prior to initiating this process, verify that funding is available for the position by contacting the Office of Budget and Planning and contact a member of the Classification and Compensation team to discuss the position.

This functionality is available to Hiring Managers (including Department Chairs) and Administrative Assistants responsible for creating positions within their organizations.

If you are looking to post/advertise an Adjunct or Temporary position, DO NOT create a position, instead go directly to Create a Job Requisition. Please visit the Workday 2020 website for documentation on this process.

- 1) Enter **Create Position** into the *Search* bar and select **Create Position - Task**.

The screenshot shows the Workday search interface. On the left is the Workday 'W' logo. To its right is a search bar containing the text 'create position'. Below the search bar, the result 'Create Position - Task' is displayed and highlighted with a blue background.

- 2) Confirm the **Supervisory Organization** for this position is correct. This should be defaulted as your department. If not, click the **prompt icon** and search for your department. Note – When creating a position, you should always select the appropriate permanent supervisory org.

The screenshot shows the 'Create Position' form. At the top is a blue header with the text 'Create Position'. Below the header, there is a section for 'Supervisory Organization' with a red asterisk indicating it is required. To the right of the label is a search bar with the word 'search' inside. A red box highlights a menu icon (three horizontal lines) to the right of the search bar. Below the search bar, a dropdown menu is open, showing several options: 'Supervisory Organizations', 'Active Supervisory Organizations by Hierarchy', 'Supervisory Organizations by Manager', and 'Supervisory Organizations by Manager Hierarchy'. Each option has a right-pointing arrow next to it.

- 3) Click the **OK** button.
- 4) On the **Create Position** page, complete the required position information and hiring restrictions as needed.

The screenshot shows the 'Create Position' form. The 'Position Request Reason' dropdown menu is open, showing three options: 'Create Position > Created Position > Budgeted', 'Create Position > Created Position > Not Budgeted', and 'Create Position > Created Position > Conversion'. The 'Hiring Restrictions' section is underlined. The 'Job Profile' field has a search icon.

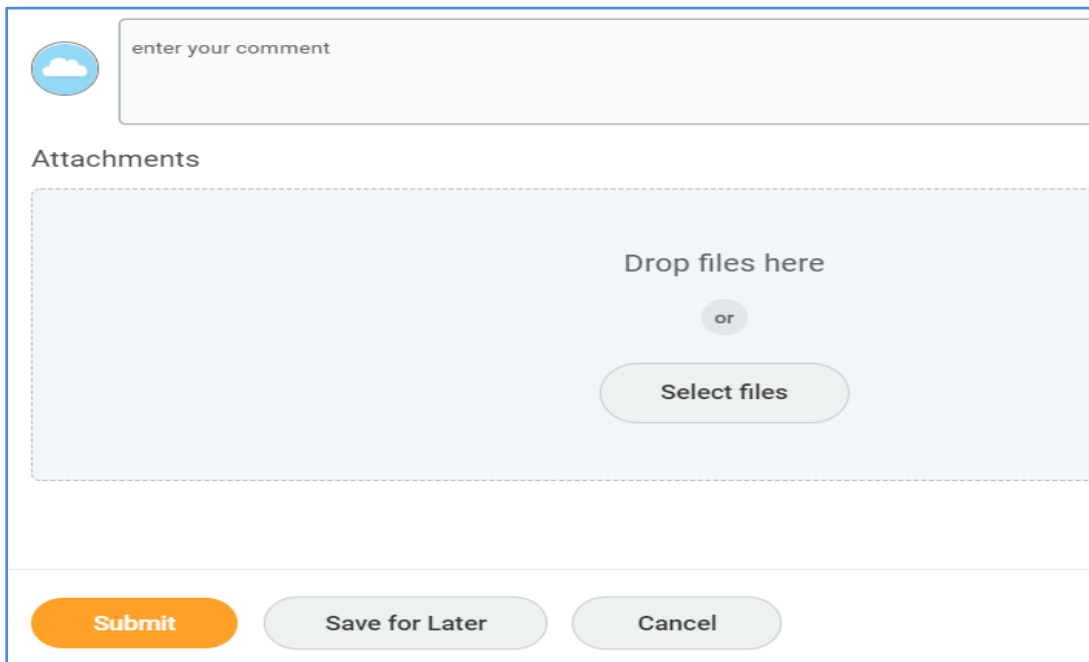
- a. **Position Request Reason:** Indicate if this newly created position is Budgeted or Not Budgeted. DO NOT select *Create Position – Conversion* (if prompted). This is for HR only.
  - i. Budgeted - Positions approved by the President during the Annual Budget Call process.
  - ii. Not Budgeted - Positions approved outside of the Annual Budget Call process.
- b. **Job Posting Title:** Should be descriptive as it flows into the job posting. (Examples; Program Assistant - School of Nursing, Adjunct Faculty - Physics, Assistant Director - Residence Life)
- c. **Number of Positions:** The number of open positions to create for this title.
- d. **Availability Date:** Enter the current date.
- e. **Earliest Hire Date:** The earliest date to have an employee hired into this position.
- f. **No Job Restrictions:** Leave this box unchecked.

- g. **Job Profile:** Click the prompt icon to select the Job Profile. Refer to the Human Resources website under Classification for a list of job profiles and job specifications.
- h. **Job Description Summary:** The job summary will default into the Job Description Summary section based on the Job Profile selected.
- i. **Job Description:** Click into the field and include the following: Overview, Responsibilities and Required and Preferred Qualifications of the position. Note- This information can be copied from another document and pasted into this section. When copying, the information needs to be copied from a Rich Text Format (RTF) document versus a Word document.
- j. **Location:** The primary location where the individual in this position will primarily work.
- k. **Time Type:** Select **full-time** or **part-time**.
- l. **Worker Type:** Select **Employee**.
- m. **Worker Sub-Type:** Select **Regular** in this field.

Hiring Restrictions	Qualifications
Availability Date	* 05 / 02 / 2019
Earliest Hire Date	* 05 / 02 / 2019
No Job Restrictions	<input type="checkbox"/>
Job Profile	* X Professional Services Specialist 1 (AFT)
Job Description Summary	Under the administrative direction of a Director II level of higher education, is responsible for independently performing a professional function or functions of unusual difficulty, sensitivity and/or complexity; for functioning as an accomplished profes
Job Description	*  Organizes assigned work and develops appropriate methods for meeting goals and objectives. Continuously reviews and evaluates workload; develops and implements improved methods as required. Develops and recommends an appropriate budget for activities supe
Location	X Main Campus
Time Type	X Full time
Worker Type	X Employee
Worker Sub-Type	X Regular

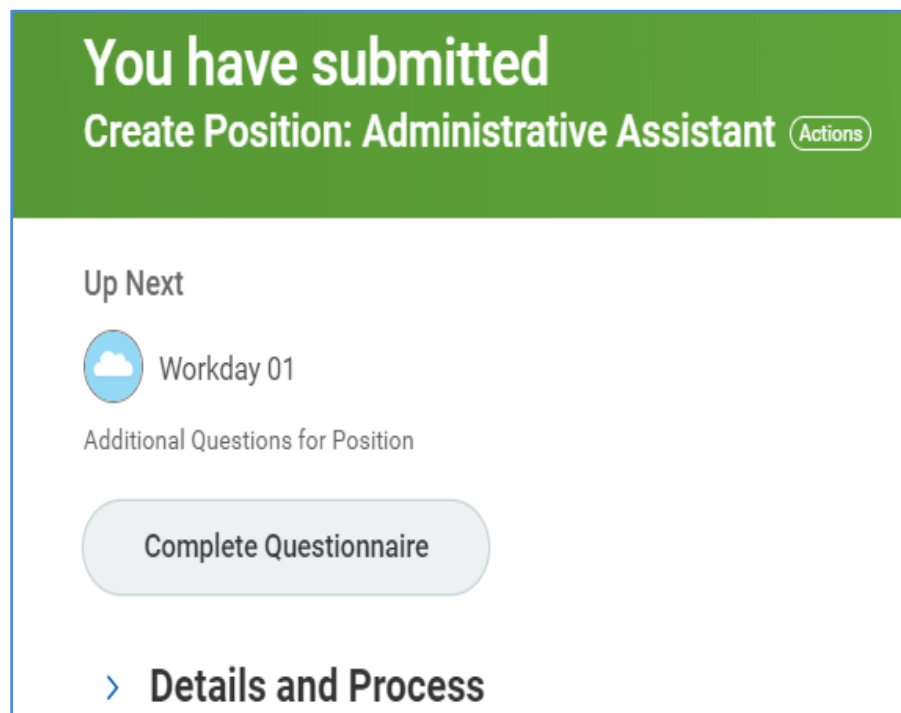
- n. **Comment Area:** Include the justification or comments for requesting the position. If this is a part-time position enter the % of FTE.
- o. **Attachments:** Attach any necessary documentation such as organizational chart, grant agreement, etc.

5) Click the **Submit** button.



The screenshot shows a form submission interface. At the top, there is a text input field with a cloud icon on the left and the placeholder text "enter your comment". Below this is a section titled "Attachments" with a large dashed border. Inside the dashed border, the text "Drop files here" is centered, followed by a small "or" button and a "Select files" button. At the bottom of the form, there are three buttons: "Submit" (orange), "Save for Later" (light gray), and "Cancel" (light gray).

6) Click the **Complete Questionnaire** button to answer the associated questions.



The screenshot shows a confirmation screen with a green header. The header contains the text "You have submitted" in large white font, followed by "Create Position: Administrative Assistant" in smaller white font, and a small "Actions" button. Below the header, the text "Up Next" is displayed. Under "Up Next", there is a cloud icon followed by the text "Workday 01". Below this, the text "Additional Questions for Position" is displayed. A large "Complete Questionnaire" button is centered below the text. At the bottom, there is a link with a right-pointing chevron and the text "Details and Process".

7) Click the **Submit** button.

## Complete Questionnaire

'Position Additional Details' for Create Position: Administrative Assistant Actions

Position Additional Details

How will this position be funded? Please select all that apply. (Required)

HIPAA Employment Category

Healthcare Workforce Member – this position has access to student health information or other clinical HIPAA protected health information (PHI). (Required)


☐ Yes
 ☐ No

The system displays a confirmation of completion for the questionnaire and brings up the **Change Organization Assignments** step to complete.

## Change Organization Assignments

- 1) Click **Open** to access the *Change Organization Assignments* screen.

Up Next



Workday 01

Change Organization Assignments

Open

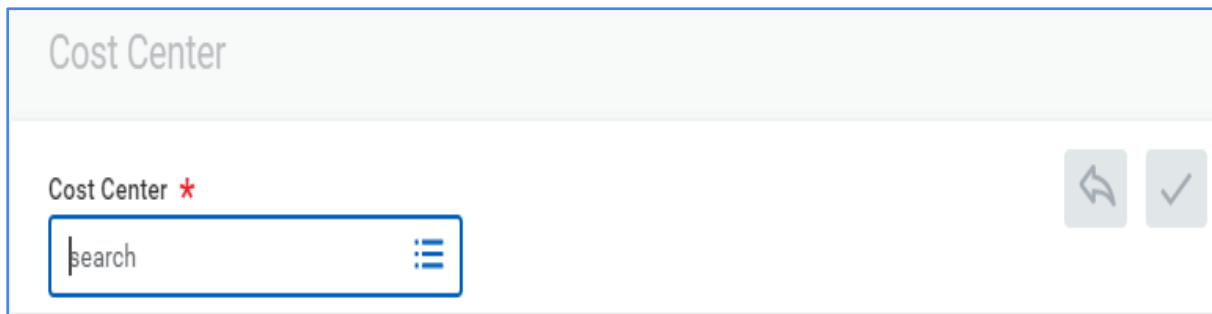
- 2) In the **Organizations** section, confirm the **Company** field reads Montclair State University.

Company

Company \*

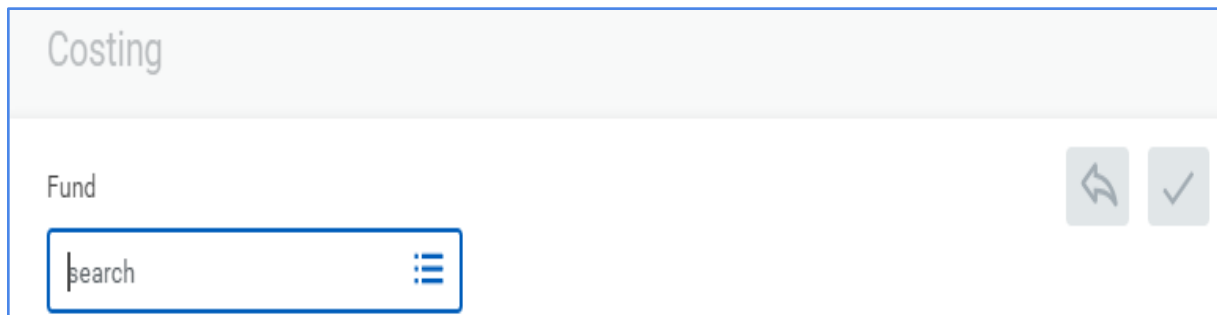
Montclair State University

- 3) In the **Cost Center** field, click the pencil icon, enter the department name in the *Search* field and select the appropriate department. Click the **checkmark** to save.



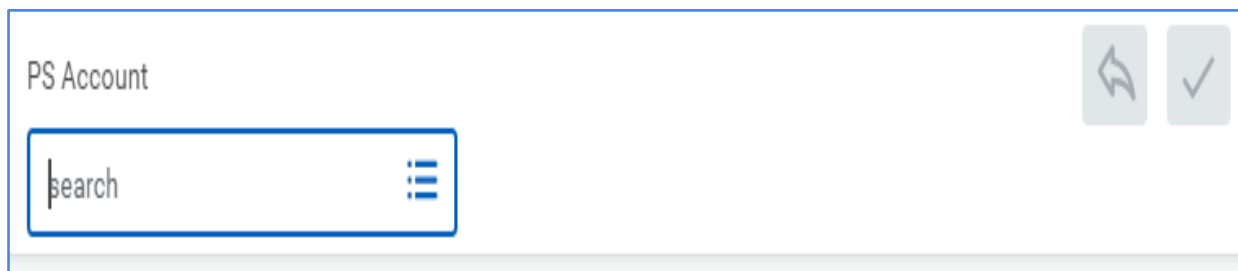
The screenshot shows a form titled "Cost Center". Below the title is a label "Cost Center" followed by a red asterisk. To the right of the label are two icons: a pencil icon and a checkmark icon. Below the label is a search input field with the placeholder text "search" and a list icon (three horizontal lines) to its right.

- 4) In the **Costing** section, click the pencil icon to enter the appropriate fund in the **Fund** field. Click the **checkmark** to save.



The screenshot shows a form titled "Costing". Below the title is a label "Fund". To the right of the label are two icons: a pencil icon and a checkmark icon. Below the label is a search input field with the placeholder text "search" and a list icon (three horizontal lines) to its right.

- 5) In the **Other** section, click the pencil icon for **PS Account** and choose the appropriate child account from where the salary will be drawn. For a list of options, click the **Prompt** icon. Note- Do **NOT** select the 50000 Personnel Pool option.



The screenshot shows a form titled "PS Account". Below the title is a label "PS Account". To the right of the label are two icons: a pencil icon and a checkmark icon. Below the label is a search input field with the placeholder text "search" and a list icon (three horizontal lines) to its right.

- 6) Click the **checkmark** to save.
- 7) Click the **Submit** button.

The system will display a message that the Organizational Assignment was submitted, and bring up the **Default Compensation Change** step to complete.

## Default Compensation Change

- 1) Click the **Open** button to complete compensation for the position.
- 2) Confirm the **Effective Date**.
- 3) **Guidelines** data defaults in based on the job profile previously selected.

4) Click the pencil in the **Guidelines** section to enter the pay information for the position.

- AFT positions - review defaulted data and click the **Prompt** icon in the **Step** field to choose the appropriate step. **Total Base Pay Range** represents the beginning and end of the selected compensation package.

### Guidelines

**Total Base Pay Range**  
40,000.00 - 250,000.00 USD Annual

**Compensation Package \***

✕ AFT⋮

**Grade \***

✕ AFT Schedule D (12 Month)⋮

**Grade Profile**

✕ AFT 12 Range X⋮

**Step**

⋮

**Progression Start Date**

📅

- Managerial positions - review defaulted data and click in the **Salary** section to complete the **Compensation Plan > Salary Plan** and **Amount** fields.

Salary

Compensation Plan

× Salary Plan

Total Base Pay Range

50,642.00 - 77,086.00 USD Annual

Apply FTE%

☒

Amount \*

80,000.00

Currency \*

× USD

Frequency \*

× Annual

> Additional Details

- Civil Service positions - review defaulted data and click the **Prompt** icon in the **Step** field to choose the appropriate step. Confirm the data in the **Hourly** section. Refer to HR website for union contracts and rates.

Hourly

Assignment Details

● 8.85 USD Hourly

added

Plan Name

● Hourly Plan

added

Effective Date

● 06/24/2019

added

- 5) Click the **checkmark** when done.
- 6) Click the **Approve** button to continue.



Note: Once this step is complete the Initiator cannot make any changes and must contact Human Resources if updates are needed.

## Approval Process

The process moves forward for additional reviews and approvals to the list below.

Note- any of the approvers in the approval process can send the request back to the Initiator from a specific point within the process. The Initiator needs to make the required changes, confirm all data going forward is correct, and resubmit the request.

- Compensation Analyst
- Hiring Manager
- Unit Head
- Vice President
- Budget Manager and/or Grant Specialist
- Vice President, Human Resources

When all approvals have been completed, the position is created, and the position number is assigned. If you are ready to post (advertise) the position, proceed with the Create Job Requisition process.

## Check the Status of a Position

- 1) Navigate to your **Inbox** and click on **Archive**.

The screenshot displays the 'Inbox' interface with a green header. Below the header, there are two tabs: 'Actions (9)' and 'Archive'. The 'Archive' tab is selected. A dropdown menu shows 'Sort By: Newest' and a filter for 'From Last 30 Days'. A list of events is shown, including 'Create Position: Jr Accountant' (3 hour(s) ago - Successfully Completed), 'Create Position: Sr Account Manager' (3 hour(s) ago - In Progress: Yanling Sun), 'Create Position: Instructional Designer for Web Content' (3 day(s) ago - Successfully Completed), 'Job Requisition: R-1000892 Instructional Designer for Web Content' (3 day(s) ago - Successfully Completed: Monica Tejada), and 'Create Position: HelpDesk Supervisor' (5 day(s) ago - In Progress: Yanling Sun).

The right panel shows the 'View Event' details for 'Create Position: Jr Accountant'. It includes a status of '3 hour(s) ago - Successfully Completed', 'For' 'Instructional Technology and Design Services (Yanling Sun)', 'Overall Process' 'Create Position: Jr Accountant', 'Overall Status' 'Successfully Completed', and 'Due Date' '06/10/2019'. Below this, there are two tabs: 'Details' (selected) and 'Process'. The 'Details' tab shows the following information:

Organization	Instructional Technology and Design Services (Yanling Sun)
Positions Created	P1021304 Jr Accountant (Unfilled)
Position Request Reason	Create Position > Created Position > Budgeted
Job Posting Title	Jr Accountant

- 2) In the **View Event** section of the screen, the **Details** tab displays the details of the position, and the **Process** tab shows the process history of the position.
- 3) To view All of your positions, enter **View All Positions** in the *Search* bar and select the search filters to view the data. When viewing the results table, click on the position title in the Position column to view the details of the position.

## View All Positions

**Instructions**    The View All Positions report provides information for position management Supervisory available.

**Organization**    \*    X TEST Testing and Quality (Workday 24 [C])    ⋮

**Include Subordinate Organizations**    ☐

**Position Status**    \*    search    ⋮

**Include Open Positions Available On or Before**    \*    ☐ Closed  
☐ Filled  
☐ Frozen  
☐ Open