Explore

Workday Curriculum Guide – Staffing

This guide presents instructional materials pertaining to Staffing. These topics cover hiring, termination, promotions, and more. Each topic is hyperlinked to its webpage on Workday Help. Materials are presented in one of these formats:

- **Webinars** are recordings of live seminar sessions presented by Workday Services.
- **Job Aids** are step-by-step instructions for a specific process.
- **Reference Guides** contain useful information and data on a topic.

We recommend that you view these materials in the order they are presented allowing that you are the Target Audience. This way you will not skip over important information in a previous topic.

Workday Topics	Format	Target Audience	Description
Keeping Organizations Organized in Workday	Webinar	Benefit Partner, HR Contact, HR Partner, Organization Partner, Payroll Partner, Security Partner	This webinar overviews the different types and purpose of organizations in Workday. It covers best practices for creating and using supervisory organizations, the manager role, inactivation, and specific actions for contingent workers. It reviews reports to monitor your member's organizational health, including the dreaded Supervisory Org Error Report.
Managing Supervisory Organizations	Job Aid	Organization Partner	This job aid outlines the process for an Organization Partner to manage Supervisory Organizations. This includes creating new supervisory organizations, assigning superior, and dividing supervisory organizations.
Creating and Editing Positions	Webinar	HR Contact, HR Partner, Manager	This webinar discusses the three core business processes for your staffing needs: Create Position, Edit Position Restrictions, and Edit Position. It goes over the steps, impacts based on unfilled and filled positions, and best practices for worker types.
Assign Costing Allocations	Job Aid	HR Contact, HR Partner, Payroll Partner, Manager	This job aid outlines the process for a Payroll Partner, HR Contact, HR Partner or Manager to edit existing costing allocations for a position and/or Worker as a stand-alone process.
Costing Allocations	Reference Guide	Budget Partner, HR Contact, HR Partner, Manager, Payroll Partner, Sponsored Research Partner	This reference guide provides a comprehensive overview of the Assign Costing Allocations business process.

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Create Position	Job Aid	HR Contact, HR Partner, Manager	This job aid outlines the tasks for a HR Partner, HR Contact, and Manager to create a position.
Close Position	Job Aid	Department Head, HR Contact, HR Partner, Manager	This job aid outlines the process for an HR Partner, Manager or Department Head to close a position that is no longer needed, can be eliminated due to reorganization, or for which funding has ended. There is also the option to close a position after a termination, the end of an additional job, or when an Employee transfers to a new position.
Edit Position Restrictions	Job Aid	HR Contact, HR Partner, Manager	This job aid outlines the process for an HR Contact, HR Partner or Manager to make changes to the Hiring Restrictions and Qualifications of a position using the Edit Position Restrictions business process.
View Position Restrictions	Job Aid	Employee, Manager	This job aid outlines the process for an Employee, Manager, and other Workday security roles to view an Employee's Position Restrictions. Position Restrictions comprise the job summary, job description, responsibilities and required qualifications of a specific position.
Workday Staffing Pt 1: UINs and Prehire Records	Webinar	HR Contact, HR Partner, Experienced Support Personnel, UIN Partner	This webinar trains you on best practices for starting a hire, checking UIN Search and Manager, using the Workday Search feature, running the Ineligible for Rehire Report and more. Topics include learning to identify duplicate records and pre-hire records linked to a requisition, finding no show and ineligible for hire records, correcting pre-hire records, and marking the correct pre-hire for deletion.
Edit System ID	Job Aid	UIN Partner	This job aid outlines the process to edit a Worker's System ID (UIN) in Workday during Hire or Contract Contingent Worker.
Mark Pre-Hires for Deletion	Job Aid	HR Partner	This job aid outlines the activities for an HR Partner to mark a duplicate Pre-Hire record for deletion. Marking a Pre-Hire record for deletion will prevent the record from possible selection during the Hire business process.
Workday Staffing Pt 2: Hiring New Employees	Webinar	HR Contact, HR Partner, Experienced Support Personnel	This webinar details the Hire business process from beginning to end. Topics include understanding how to appropriately complete details of the Hire such as Annual Work Period and Disbursement Period, Job Classifications, and Costing Allocations. It also covers best practices to avoid common pitfalls. You will also learn which reports will help you monitor relevant

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			Hire processes in order to manage the process efficiently.
Edit Other IDs	Job Aid	Various	This job aid outlines the process for various security roles edit an Employee's other IDs. Other IDs act as custom identification data for business purposes in Workday.
Custom Other IDs	Reference Guide	Various	This reference guide explains the Custom Other IDs that are used for Benefits, Payroll, Staffing, and Time/Absence, their possible values, and how the IDs are used.
Form I-9 Processing	Reference Guide	I-9 Processor, I-9 Partner	Use this reference guide to learn how Form I-9 processes need to be completed.
Workday Staffing Pt 3: Onboarding & Benefits	Webinar	Benefits Partner, Experienced Support Personnel, HR Contact, HR Partner, Payroll Partner	This webinar walks you through the New Employee's onboarding experience. We will train you on how to support employees as they navigate their onboarding dashboard and make benefits elections. You will learn onboarding pitfalls to avoid and which issues impact benefits and retirement enrollment. We will also appropriate reporting to monitor new employee progress as they complete their onboarding tasks.
Onboarding Processes by Security Role	Reference Guide	Various	This reference guide details the steps within the onboarding process by security role for Hire, Change Job and Add Additional Job business processes.
Additional Data Custom Objects	Reference Guide	Various	This reference guide provides information on various Custom Objects: Insurance Billing, Preservation Hold Custodian, Retiree Electronic Communication, etc.
Change Photo for Your Employee	Job Aid	HR Partner, Manager	This job aid outlines the process for an HR Partner or Manager to change their Employee's or Contingent Worker's photo in Workday.
Edit Non-Effective Dated Additional Data	Job Aid	Various	This job aid outlines the process to edit Additional Data which are a variety of Custom Objects in Workday. Custom Objects are either effective-dated or non-effective dated and are specific to an Employee.
Onboarding	Job Aid	Employee	This job aid provides a new Employee guidance on how to complete the onboarding process in Workday.
Workday Staffing Pt 4: Report No Show	Webinar	HR Contact, HR Partner, Experienced	This webinar covers the Report No Show and Correct Worker Start Date business processes so you can handle those "oops" that occur when hiring new

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		Support Personnel	employees. We'll use case scenarios to review impacts to Recruiting or downstream processes, remediation work, notifications and reports to help monitor the work.
Correct Worker Start Date	Reference Guide	Benefits Partner, HR Contact, HR Partner	This reference guide provides an overview of the business process and provides guidance on facilitating the process effectively; best practice guidelines are also provided when the business process has advantages over using the Correct task that is also available in Workday.
Report No Show – Decisions and Impacts	Reference Guide	HR Contact, HR Partner, Manager	This reference guide provides guidelines for when the Report No Show business process is appropriate to initiate, outline examples for when Report No Show is not possible, and explains the possible downstream impacts to recruiting processes.
Report No Show	Job Aid	HR Contact, HR Partner, Manager	This job aid outlines the activities for an HR Partner, HR Contact or Manager to initiate the Report No Show business process for when an Employee does not arrive as expected on the first official day of work or has completed the Hire business process but will no longer fill the position for which they were originally hired; information is also included for Managers, Recruiting Coordinators and Recruiting Partners on next steps.
Students as Employees	Webinar	HR Contact, HR Partner, Manager	This webinar provides a comprehensive overview of how Workday has been configured to employ, pay and manage student workers.
Changing or Moving Jobs	Webinar	HR Contact, HR Partner, Manager, Payroll Partner	This webinar discusses the Change Job and Move Workers business processes. We will review steps and best practices for editing details of the employee's current job, transferring the employee to a different job, giving a promotion, or simply moving the worker to a new manager.
Change Job Reasons	Reference Guide	HR Contact, HR Partner, Manager	This reference guide details the various reasons that would prompt the need to initiate the Change Job business process.
Change Job	Job Aid	HR Contact, HR Partner, Manager	This job aid outlines the activities for an HR Partner, HR Contact or Manager to complete a Change Job business process and the related transactions. Related transactions may include, promotions, transfers, reclassifications, changes in hours or work periods, and changing location.

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Start Job Change	Job Aid	HR Contact, HR Partner, Manager	This job aid outlines the activities for an HR Contact, HR Partner, and Manager to initiate and complete the Start Change Job business process when only the Additional Job Classification is changing for the Worker Position.
Move Workers (Supervisory)	Job Aid	HR Contact, HR Partner	This job aid outlines the process for an HR Partner or HR Contact to move positions and Workers from one Supervisory Organization to another without a change in their position details.
Add Additional Job/Switch Primary Job	Webinar	Benefits Partner, HR Contact, HR Partner, Payroll Partner	This webinar discusses the Add Additional Job and Switch Primary Job business processes. We will review steps and best practices for adding subsequent jobs and switching which job is primary.
Add Additional Job	Job Aid	HR Contact, HR Partner, Manager	This job aid outlines the process for an HR Contact, HR Partner, Manager or someone in the Management Chain to initiate the process to add an additional job for an Employee in Workday.
Switch Primary Job	Job Aid	HR Contact, HR Partner, Manager, Various	This job aid outlines the process for an HR Contact, HR Partner, Manager, or someone in the Management Chain to switch an Employee's additional job to be their primary job.
Ending Employment	Webinar	Benefits Partner, HR Contact, HR Partner, Payroll Partner	This webinar reviews the Termination and End Additional Job business processes and best practices for completing these processes. It discusses actions that touch payroll such as paying out vacation balances and death benefits.
End Additional Job	Job Aid	HR Contact, HR Partner, Manager, Various	This job aid outlines the process for a HR Contact, HR Partner, Manager or Management Chain to end an additional job assigned to an Employee.
Termination (Involuntary)	Job Aid	HR Contact, HR Partner, Manager	This job aid describes the process for HR Contacts, HR Partners, or Managers to end employment of an Employee's Primary Job when the termination is involuntary. Additional information is included for when the primary reason for termination is death.
Termination (Voluntary)	Job Aid	HR Contact, HR Partner, Manager	This job aid describes the process for HR Contacts, HR Partners or Managers to end employment of an Employee's Primary Job when the termination reason is voluntary.
Faculty Tenure and Emeritus Status	Webinar	Faculty Partner, HR Partner	This webinar presents an overview of how Workday has been configured to be the official record of source for Faculty Tenure and Emeritus awards.

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Add Emeritus Status	Job Aid	Talent Analyst, Talent Partner	This job aid outlines the activities for a Talent Partner or Talent Analyst to add Emeritus Status for an individual using the Add Award and Activity process.
Change Title for Emeritus Status	Job Aid	Faculty Partner, HR Contact, HR Partner, Manager	This job aid outlines the process for an HR Partner, HR Contact, Faculty Partner or Manager to update an individual's Business Title for Emeritus Status.