

**Keep in mind**

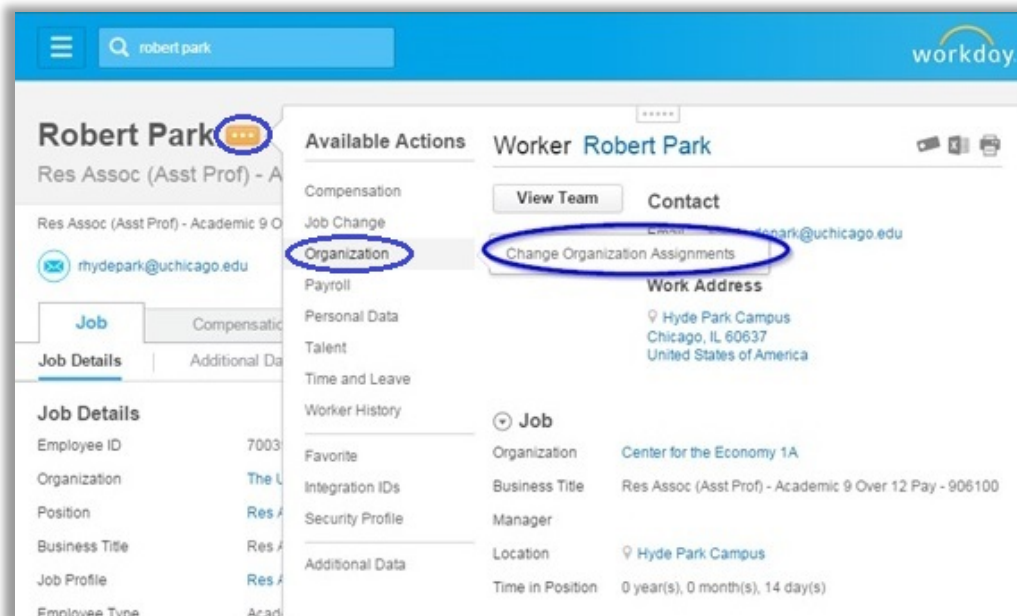
- Organization assignments include the assignment of an HRMS Department Number, Affiliated Organization (if applicable) and a default FAS Account and Sub Account. These assignments reside on the position.
- This task will appear in the **Create Position, Edit Position Restrictions, Hire, Change Job** and **Add Job** business processes and can also be initiated as a stand-alone business process.
- The default FAS Account that resides on the position should be either confirmed or overridden by Assigning Costing Allocations at both the Worker and Position level (see **Assign Costing Allocations** Quick Reference Guide).
- In order to update the organization assignments for all workers in a supervisory organization, the **Change Organization Assignments for Worker by Organization** business process should be initiated.

**Information Needed**

- HRMS department number
- FAS Account Number and Sub Account number that will be used as the default level of funding for the position.
- For workers (both employees and contingent workers) that have an affiliation, the **affiliated organization** (i.e. 9AR Argonne, 9FL Fermi National Accelerator Lab, 9NS Northshore or other applicable organization must be entered in the Affiliated Organization field.

**Change Organization Assignment for Worker Steps:**

1. From the **Worker Profile**, click on the **Related Actions Icon**  to display the menu of **Available Actions**. Hover over **Organization** and click on **Change Organization Assignments**.



The screenshot shows the Workday interface for a worker profile. The worker's name is Robert Park, and his job title is Res Assoc (Asst Prof) - Academic 9 Over 12 Pay - 906100. The 'Available Actions' menu is open, and the 'Organization' option is selected, with 'Change Organization Assignments' highlighted. The worker's current organization is 'Center for the Economy 1A'. Other details shown include his location (Hyde Park Campus, Chicago, IL 60637) and his time in position (0 year(s), 0 month(s), 14 day(s)).

Quick Reference Guide: *Change Organization Assignments (for Worker only & by Organization)*

- Review help text and select an **Effective Date**. Click **OK**.

### Change Organization Assignments

If HRMS account is not defaulted as desired, please update. Please assign the FAS Account and FAS Subaccounts to this worker. If this worker is affiliated with an external organization, please indicate the organization on this page.

Effective Date

Worker ★ Robert Park

- Review help text and confirm that the **Chicago HRMS Department** information is correct. If not, please update. Update the default **FAS Account** and **FAS Sub Account** numbers as necessary.

### Change Organization Assignments

If HRMS account is not defaulted as desired, please update. Please assign the FAS Account and FAS Subaccounts to this worker. If this worker is affiliated with an external organization, please indicate the organization on this page.

Effective Date 11/10/2014

Worker ★ Robert Park

Position Res Assoc (Asst Prof) - Academic 9 Over 12 Pay - 906100 - Robert Park

Supervisory Organization Center for the Economy 1A

Organization Assignments 6 Items

| *Organization Type       | Proposed Organization             |
|--------------------------|-----------------------------------|
| Company                  | search<br>✕ University of Chicago |
| UChicago HRMS Department | 30 CHICAGO BOOTH                  |
| Affiliated Organization  |                                   |
| FAS Account              | 271345                            |
| FAS Sub Account          | 1150                              |
| Executive                |                                   |

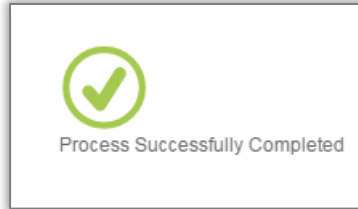
- The **Affiliated Organization** should only be completed if the position is affiliated with an outside organizations such as Argonne, Fermi Lab or Northshore.




The **Company** will pre-populate as the University of Chicago. This should not be changed. The **Executive** field should not be edited. This field is maintained at the central level.

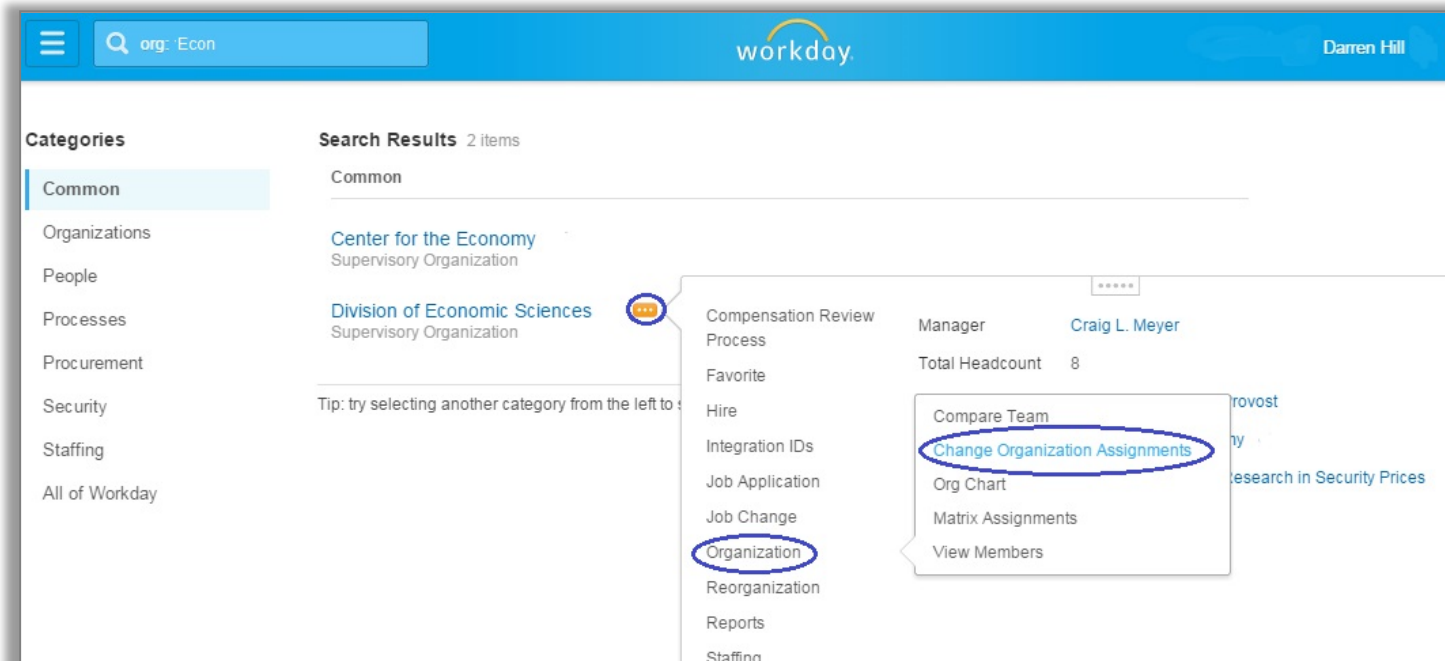
Quick Reference Guide: *Change Organization Assignments (for Worker only & by Organization)*

5. Click on the **Submit Icon**  to submit this task.
6. You will see that this task has been successfully completed.

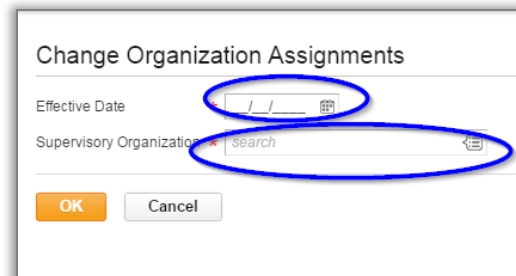


Quick Reference Guide: *Change Organization Assignments (for Worker only & by Organization)***Change Organization Assignment for Worker by Organization Steps:**

1. From the **Search** box, search for the **Supervisory Organization** for which the **Organization Assignments** need to be changed. Use the related action icon  next to the name of the organization, hover over **Organization** and select **Change Organization Assignments**.



2. Enter an **Effective Date** and confirm the desired **Supervisory Organization** is selected.
3. Click **OK**.



The screenshot shows a dialog box titled 'Change Organization Assignments'. It contains two input fields: 'Effective Date' and 'Supervisory Organization'. The 'Effective Date' field has a date picker icon and is highlighted with a blue circle. The 'Supervisory Organization' field has a search icon and is also highlighted with a blue circle. At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'.

Quick Reference Guide: *Change Organization Assignments (for Worker only & by Organization)*

4. On the next screen, only click the **Select All** checkbox if you plan to update the organization assignments for all employees in this supervisory organization with the same information. To update individual positions with the same information, scroll further down the page and ensure the check box in the **Assign Organizations** column is checked for any position that needs to have assignments updated as shown in Step 6 of this document.

**Change Organization Assignments** ⊗

Change organization assignments for one or more workers. Select the

Supervisory Organization Division of Economic Sciences 1A


Effective Date 11/10/2014

Select All

5. Update the Organization Assignment information, including: **UChicago HRMS Department, Affiliated Organization, FAS Account** and **FAS Sub Account**. The **Executive** field should not be edited. This field will be maintained at the central level. The **Company** field should always indicate the *University of Chicago*.
6. Select the employees for which you would like to update organization assignment information.

| Assign Organizations     | Worker             | Position                                  |
|--------------------------|--------------------|---|
| <input type="checkbox"/> | Andrea Sandoval 1A | Operations Assistant - Andrea Sandoval 1A |
|                          |                    |   |
|                          |                    |   |
|                          |                    |   |
| <input type="checkbox"/> | Brant Gilbert 1A   | Operations Manager - Brant Gilbert 1A     |
|                          |                    |   |

Quick Reference Guide: *Change Organization Assignments (for Worker only & by Organization)*

7. Click on the **Submit Icon**  to submit this task.
8. You will see that this task has been successfully completed.

