

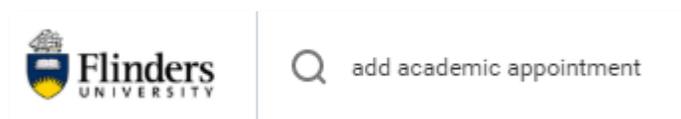
By definition, affiliates in Workday includes: Emeritus Professors; Full Academic status holders; Adjunct academic status holders; Honorary fellows; Professorial Fellows; Occupational trainees; Visiting overseas fellows/ Research Student; Visiting Overseas Scholars; Volunteers - Professional.

Access to create a new academic appointment is limited to your college for security purposes.

To create a new Academic appointment (Affiliation) complete the steps below in section 1. To extend or amend an existing Academic appointment (Affiliation) go to [section 2](#). To end an Academic appointment (Affiliation) go to [section 3](#).

## 1. Create a new Academic appointment (Affiliation)

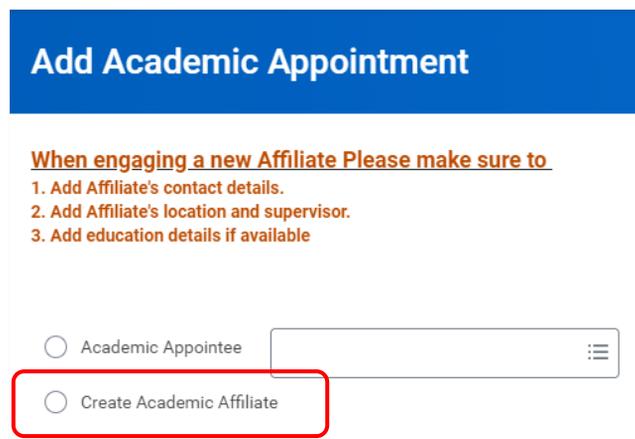
### 1.1 Type Add Academic Appointment in the *Search bar*.



### 1.2 Select *Add Academic Appointment*



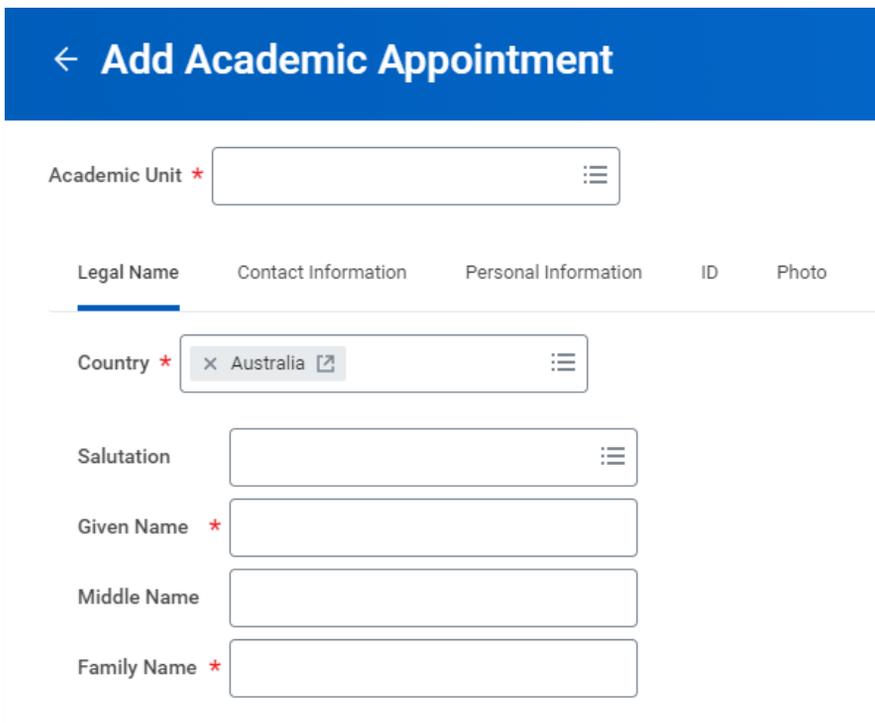
### 1.3 Select *Create Academic Affiliate*



## 1.4 Select Ok



The *Add Academic Appointment* screen will appear.

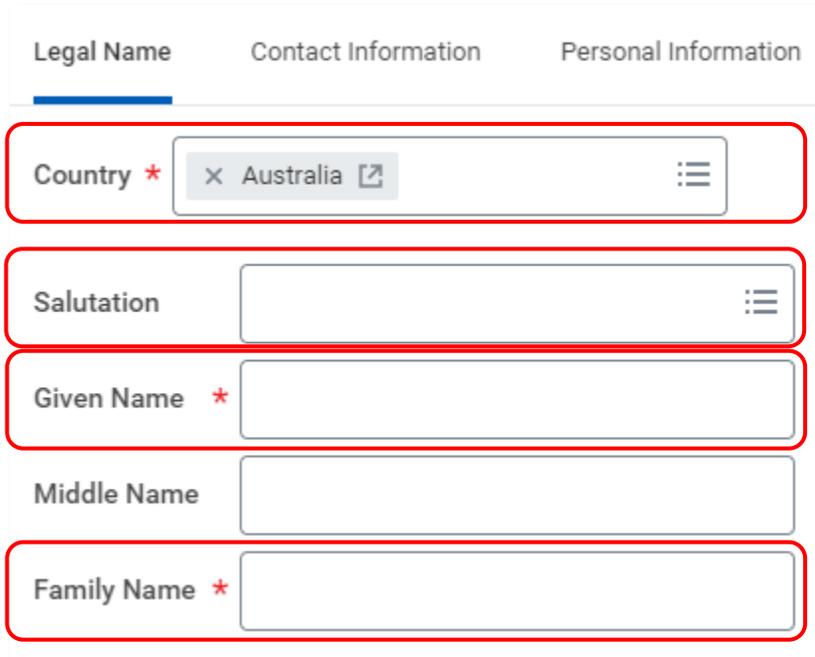
The screenshot shows a web interface for adding an academic appointment. At the top is a blue header with a back arrow and the text "Add Academic Appointment". Below the header is a form with several fields: "Academic Unit" with a red asterisk and a dropdown menu icon; a tabbed interface with "Legal Name" selected; "Country" with a red asterisk, a dropdown menu showing "Australia" with a close button and a dropdown icon; "Salutation" with a dropdown icon; "Given Name" with a red asterisk; "Middle Name"; and "Family Name" with a red asterisk. Each field is represented by a white input box with a grey border.

## 1.5 Enter the *Academic Unit*

A close-up of the "Academic Unit" field. It consists of the text "Academic Unit" followed by a red asterisk and a white input box with a grey border and a dropdown menu icon on the right side.

Note: The Academic Unit is the college in which the affiliation is held for academic status or the academic unit e.g. biomedical sciences.

## 1.7 Enter the *Legal Name* of the Academic Appointment (Affiliate)



Legal Name    Contact Information    Personal Information

Country \*    x Australia [dropdown icon]

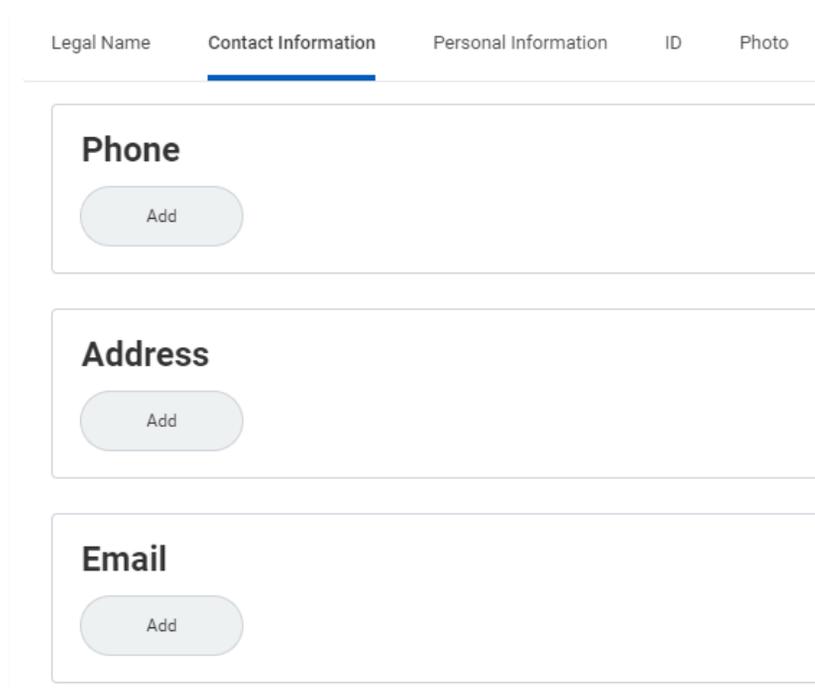
Salutation    [dropdown icon]

Given Name \*    [input field]

Middle Name    [input field]

Family Name \*    [input field]

## 1.8 Enter the Contact Information of the Academic Appointment (Affiliate)



Legal Name    **Contact Information**    Personal Information    ID    Photo

**Phone**  
Add

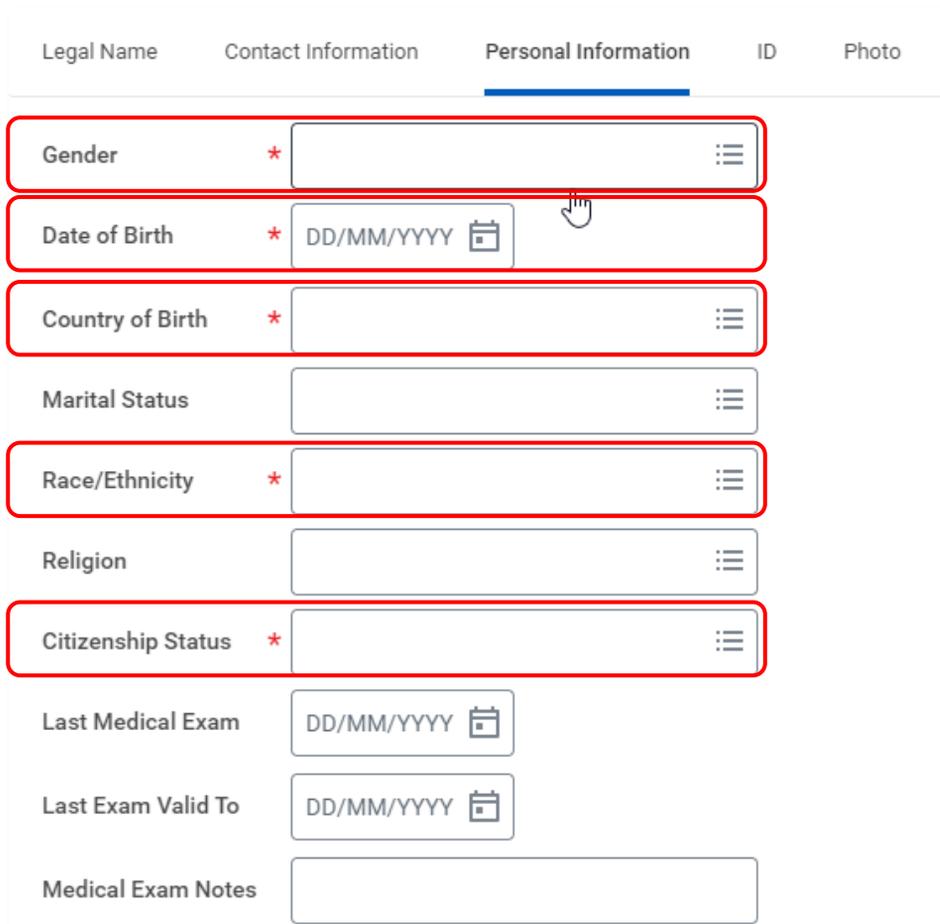
**Address**  
Add

**Email**  
Add

Note: If the contact information is not entered, a task will be triggered to your inbox to complete the information.

## 1.7 Enter the Personal Information of the Academic Appointment (Affiliate)

Ensure you enter the Gender, Date of Birth, Country of Birth, Race/Ethnicity and Citizenship Status.



Legal Name	Contact Information	Personal Information	ID	Photo
Gender *		<input type="text"/>		
Date of Birth *		<input type="text" value="DD/MM/YYYY"/> 		
Country of Birth *		<input type="text"/>		
Marital Status		<input type="text"/>		
Race/Ethnicity *		<input type="text"/>		
Religion		<input type="text"/>		
Citizenship Status *		<input type="text"/>		
Last Medical Exam		<input type="text" value="DD/MM/YYYY"/> 		
Last Exam Valid To		<input type="text" value="DD/MM/YYYY"/> 		
Medical Exam Notes		<input type="text"/>		

## 1.8 Click OK



1.9 The *Add Academic Appointment* screen will appear.

## ← Add Academic Appointment

Josphine Sharpe (Affiliate) - No Appointment

**When engaging a new Affiliate Please make sure to**

1. Add Affiliate's contact details.
2. Add Affiliate's location and supervisor.
3. Add education details if available

Start Date \*  

Academic Unit \*    

### Appointment Information

Track Type \*  

Track Type Category (empty)

Reason \*  

Rank (empty)

Constructed Title (empty)

Title \*

End Date  

Identifier \*  

Roster Percent

> **Additional Appointment Information**

## 1.10 Enter the *Start Date*

Start Date \*

## 1.11 Select *Track Type*

Track Type \*

Note: Select *Type* > and the required Affiliation type.

The image shows two screenshots of the Track Type selection dropdown menu. The left screenshot shows the 'Academic Affiliation' option selected, with a list of other options including Academic Role, Adjunct Academic Status, Distinguished Scholar, Emeritus Professor, External Access, Full Academic Status, Honorary Fellow, Honorary Overseas Fellow, Occupational Trainee Visa, and Organisation Appointment. The right screenshot shows the 'Occupational Trainee Visa' option selected, with a list of other options including Organisation Appointment, Professional Affiliation, Professional Role, Professorial Fellow, Visiting Fellow, Visiting Overseas Fellow/Research Student, Visiting Overseas Scholar/Prof, Visiting Scholar/Prof, and Volunteer.

## 1.12 Select *Reason* as *Add Academic Appointment > Reason > Unpaid Affiliate*

Reason \*

- ← Add Academic Appointment > Reason
- Add Academic Appointment > Reason > New Affiliation
- Add Academic Appointment > Reason > New Position
- Add Academic Appointment > Reason > Unpaid Affiliate

Search 

Select the *Rank* only for **Academic Status** affiliations. This is the Level.

Rank

- Academic Level A
- Academic Level B
- Academic Level C
- Academic Level D
- Academic Level E

Search 

## 1.13 Enter the *Title* of the affiliation. Note: the selected Rank for Academic Status will pre-populate in the title field. This is to be amended to state Full, Adjunct, Emeritus Status.

Title \*

## 1.14 Enter the *End Date* of the affiliation.

End Date



## 1.15 Select the required *Identifier*

Identifier \*

<ul style="list-style-type: none"><li><input type="radio"/> Academic - Status</li><li><input type="radio"/> Dean Education - Dean</li><li><input type="radio"/> Dean Research - Dean</li><li><input type="radio"/> External Access - External</li><li><input type="radio"/> HDR Coordinator - Coordinator</li><li><input type="radio"/> Honorary - Status</li><li><input type="radio"/> Primary - Organisation</li><li><input type="radio"/> Research Section Head - Head</li><li><input type="radio"/> Research Section - Research</li><li><input type="radio"/> Research Theme Leader - Leader</li><li><input type="radio"/> Research Theme - Research</li></ul> <p>Search <span style="float: right;">☰</span></p>	<p>Head</p> <ul style="list-style-type: none"><li><input type="radio"/> Research Section - Research</li><li><input type="radio"/> Research Theme Leader - Leader</li><li><input type="radio"/> Research Theme - Research</li><li><input type="radio"/> Service - Professional</li><li><input type="radio"/> Teaching Program Director - Program Director</li><li><input type="radio"/> Teaching Program - Teaching</li><li><input type="radio"/> Teaching Section - Teaching</li><li><input type="radio"/> Topic Coordinator - Coordinator</li><li><input type="radio"/> Visiting Academic - Visitor</li><li><input type="radio"/> Volunteer - Volunteer</li></ul> <p>Search <span style="float: right;">☰</span></p>
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## 1.16 Select *Submit*

## 1.17 The Up Next task will appear to *Add Education*

Click *Open* to add the Education, or click *Skip* and add the *Skip Reason* if no education is applicable.

**Add Academic Appointment**  
Add Academic Appointment: [redacted] (Affiliate) - Inactive [Actions](#)

**Up Next**  
Add Education (Sub Process)

[Open](#) [Skip](#)

[Details and Process](#)

## 1.18 The *Add Education* page will appear, complete the relevant information, ensure you upload a copy of the documentation for evidentiary reasons.

**Add Education (Sub Process)**  
Josphine Sharpe (Affiliate) [Actions](#)

Please provide evidence of education by selecting "Attachments" and uploading a copy of your transcript/relevant documentation.

Country \*

School \*

If you cannot find the school, click here

Degree

Degree Received

Field of Study

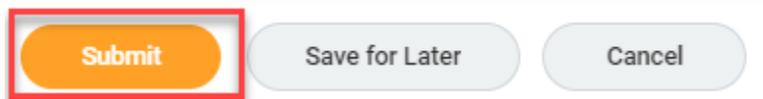
First Year Attended

Last Year Attended

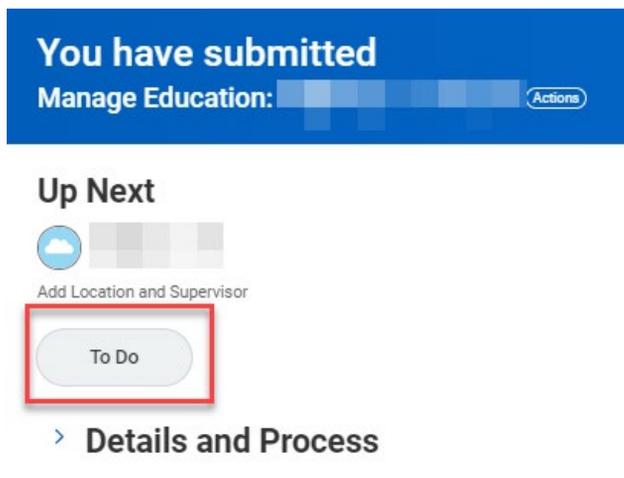
Grade Average

[Attachments](#)

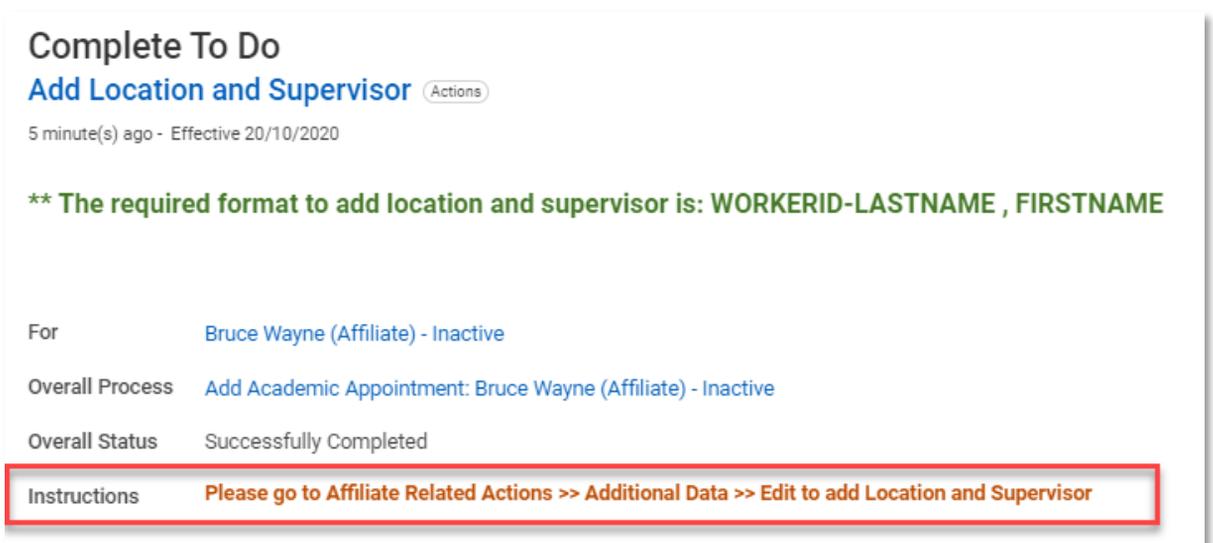
1.19 Click *Submit*.



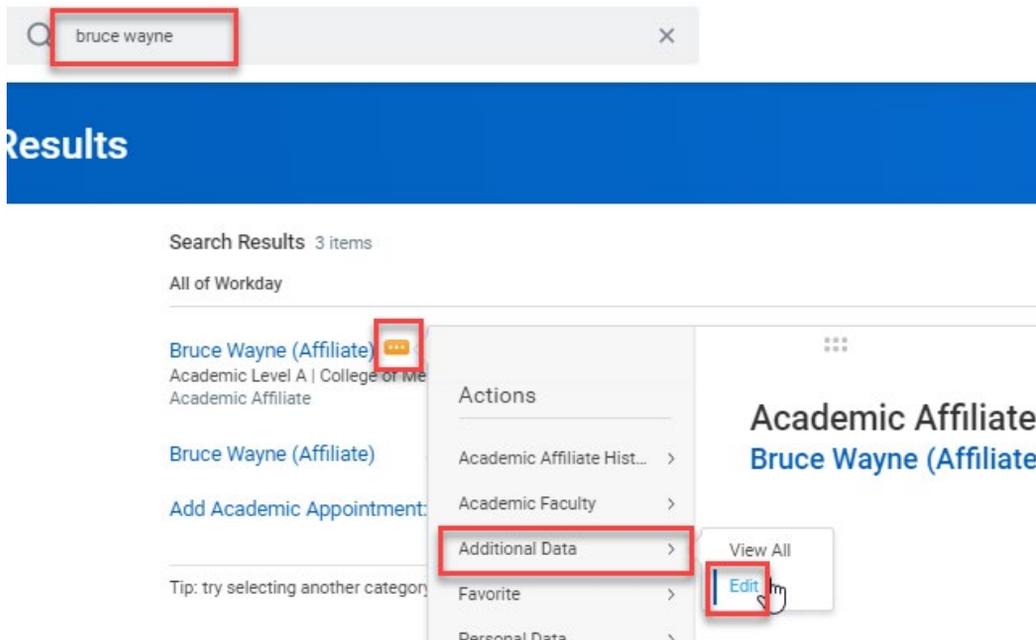
1.20 The *Up Next* task is to *Add Location and Supervisor* information. Click on *To Do*



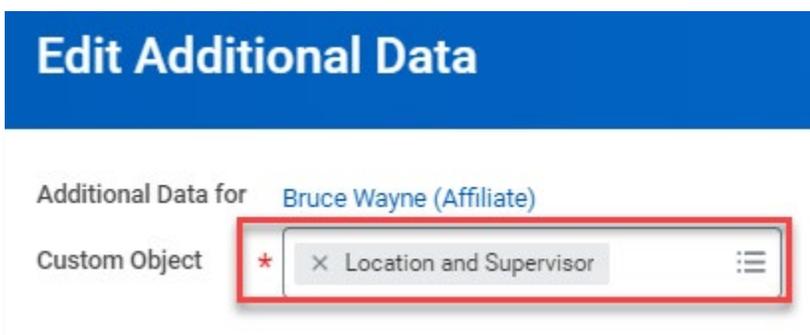
1.21 As per the instructions on the task, go to the newly created Affiliate's related actions > Additional Data > Edit and add the Location and Supervisor information.



1.21 a In the search bar, type in the Affiliate's name and enter. From the search results, select the *Related Actions* next to the affiliate's name, *Additional Data* and *Edit*



1.21 b Under *Custom Object*, select *location and supervisor*. Note: this is the only option available.

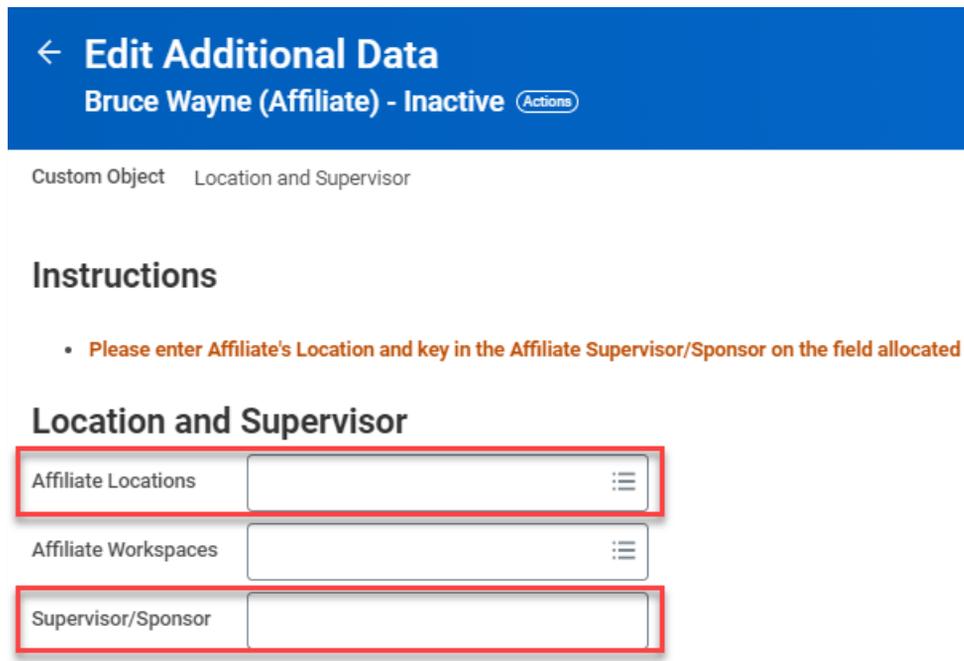


1.21 c Click *OK*.



1.21 d Enter in the *Affiliate Locations, Supervisor/Sponsor* details.

**Note: Supervisor details must be in the format of WorkerID – Surname, Firstname**



← **Edit Additional Data**  
Bruce Wayne (Affiliate) - Inactive Actions

Custom Object Location and Supervisor

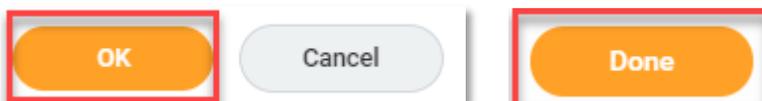
### Instructions

- Please enter Affiliate's Location and key in the Affiliate Supervisor/Sponsor on the field allocated

### Location and Supervisor

Affiliate Locations	<input type="text"/>
Affiliate Workspaces	<input type="text"/>
Supervisor/Sponsor	<input type="text"/>

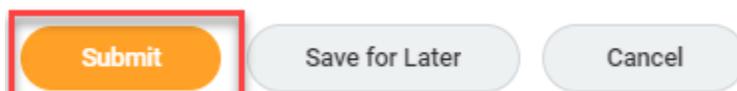
1.21 e Click *Ok* and *Done*.



OK Cancel Done

This will navigate you back to the inbox task to close off the task.

1.21 f On the task in your inbox, click *Submit*.



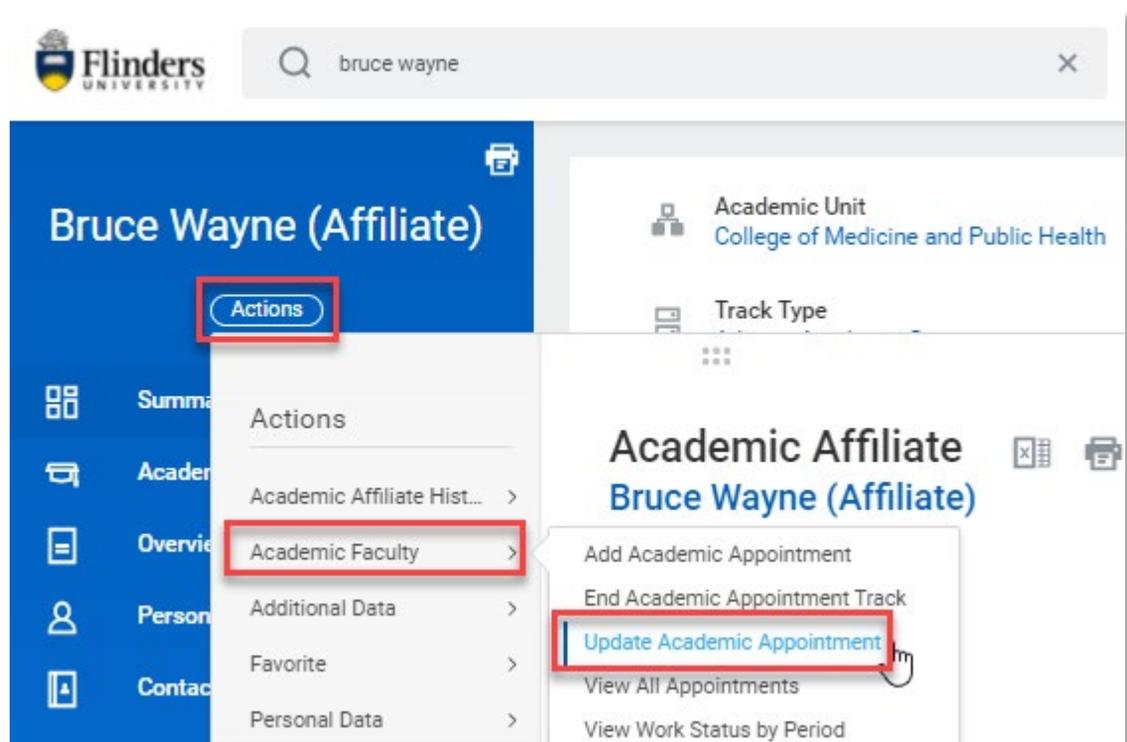
Submit Save for Later Cancel

This ends the creation of an Academic Appointment (Affiliation).

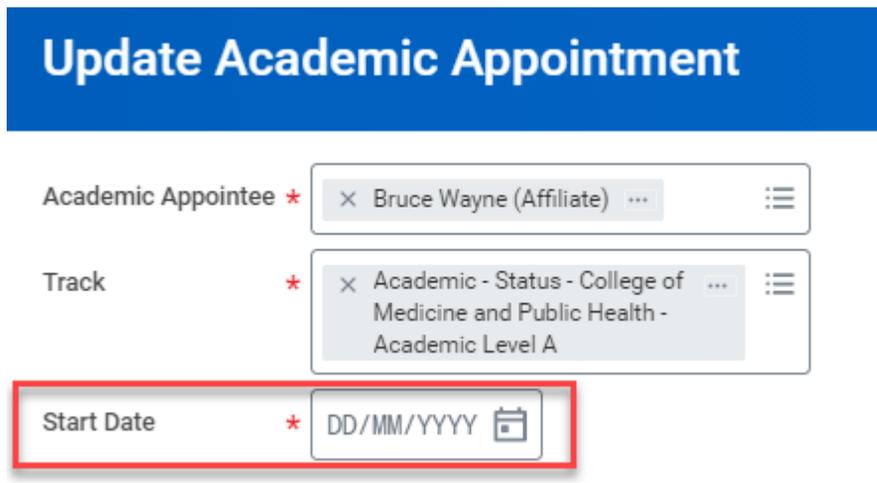
## 2. Maintain an existing Academic appointment (Affiliation)

In the instance an existing Academic appointment is to be extended/updated e.g. an academic status holder, complete the following:

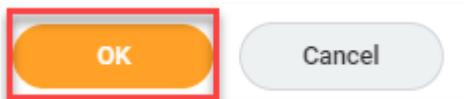
- 2.1 In the search bar, type in the Affiliate's name and enter. From the search results, or from the Affiliate's home page, select *Actions > Academic Faculty > Update Academic Appointment*.



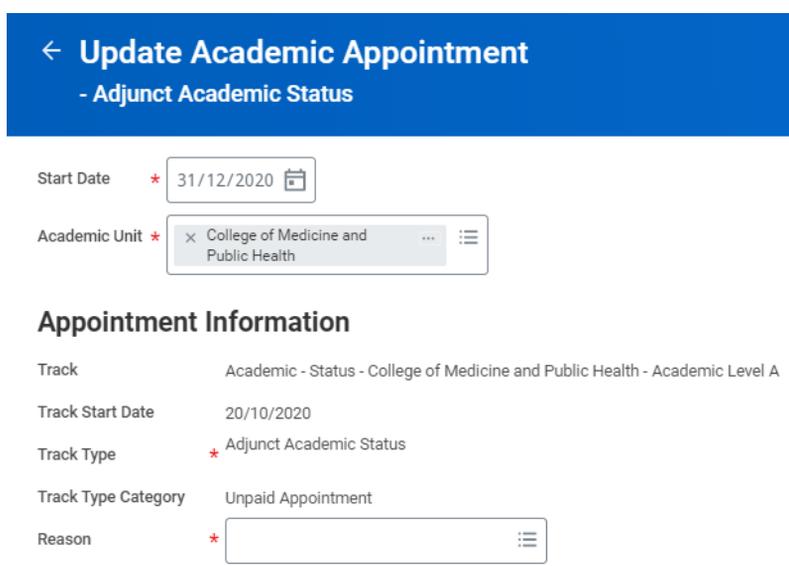
2.2 The Update Academic Appointment screen will appear. Enter the *Start Date* of the change.



2.3 Click *OK*.



The *Update Academic Appointment* screen will appear



2.4 Enter the *Reason* for the change as *Position Details Change*. Note: this is your only option.

Reason \*

← Update Academic Appointment  
> Update Appointment

Update Academic Appointment >  
Update Appointment > Position  
Details Change

2.5 If you are updating details of an Academic Status holder, please change the Title back to the Academic Status title as this populates from the Rank information each time. If you are not updating an Academic Status holder, skip to step 2.6.

Title \*

2.6 Update any other required information – e.g. the End Date, Rank etc.

2.7 Once information is updated, enter a comment as to the nature of the update and click *Submit*.

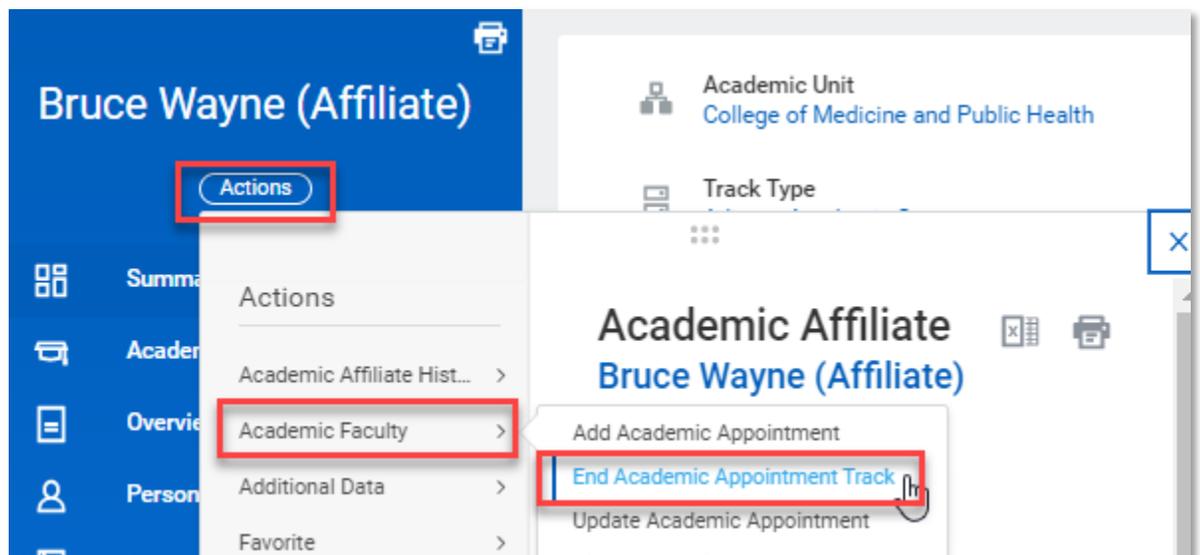


This ends the maintenance of an Academic Appointment (Affiliation).

## 3. End an existing Academic appointment (Affiliation)

In the instance an existing Academic appointment is to be ended, complete the following:

- 3.1 In the search bar, type in the Affiliate's name and enter. From the search results, or from the Affiliate's home page, select *Actions > Academic Faculty > End Academic Appointment*.



The *End Academic Appointment Track* screen will appear



## 3.2 Click *Ok*.



A new *End Academic Appointment Track* screen will appear.

### ← End Academic Appointment Track

Bruce Wayne (Affiliate) - Inactive

#### Prior Appointment

1 item

Appointment	Identifier	Academic Unit	Academic Rank
🔍	Academic - Status	College of Medicine and Public Health	Academic Level A

#### Appointment Information

Track Academic - Status - College of Medicine and Public Health - Academic Level A

Effective Date 20/10/2020

End Date \*  📅

Reason \*

enter your comment

#### Attachments

Drop files here

or

Select files

**Submit** Save for Later Cancel

## 3.3 Enter the *End Date*

End Date \*  

## 3.4 Enter the *Reason*. Note: there is only one option, Appointment Ceased.

Reason \*

← End Academic Appointment >  
End Academic Appointment

End Academic Appointment > End Academic Appointment > Appointment Ceased

## 3.5 Enter a comment, attach any relevant documents (if required) and select *Submit*.



### Attachments

Drop files here

or

Select files

This ends the cessation of an Academic Appointment (Affiliation).