

Affiliations are managed through **academic appointments** in Workday.

**Academic staff** can be associated to College sub structures such as teaching program, research section, teaching section and research theme. These are maintained in Workday through **academic affiliations**.

**Professional services affiliations** identify staff who spend a substantial part of their time directly supporting specified colleges or portfolios. Staff are either located within the area they are providing services to, or are located in their functional group, but the service receiver has an understanding of the staff member's priorities and the services provided.

There are two types of professional service affiliations.

**Embedded:** these staff are allocated to one or more college/portfolio and are generally located within a college/portfolio or are located across multiple college/portfolios.

**Pooled:** these staff are allocated to support one or more college but are normally located within their own 'home' portfolio or functional area.

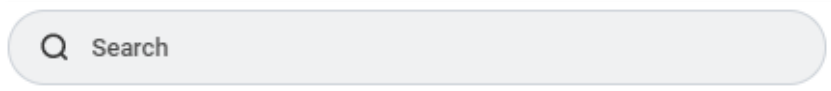
These are maintained in Workday through **service affiliations**.

An authorised user will have the ability to maintain affiliation records by:

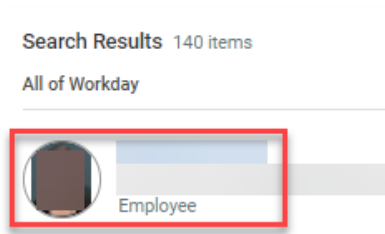
1. Adding Affiliations
2. Updating Affiliations
3. Ending Affiliations

## 1. Adding Affiliations

1.1 From the search bar, type in the *name of the worker* to have the affiliation added and click *Enter*.

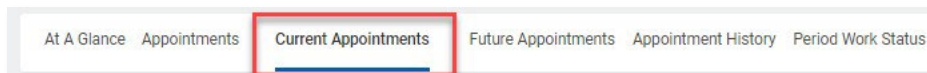


1.2 From the search result, open the worker's profile.



1.3 Select the **Academic** option on the left hand side.

1.4 Select the **Current Appointments** tab.



1.5 Check the **Current Appointments** to ensure there is a need to add another, if there is a need to proceed, select **Add**.

At A Glance Appointments **Current Appointments** Appointment History Period Work Status

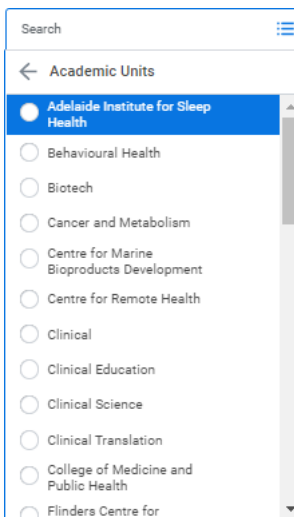
5 Items

| Appointm Identifier | Track Type                  | Academic Unit                                       | Title      | Roster % | Track Start | Appointment Start | Position Number | Job Profile | HR FTE  | Blended FTE | Pay  |        |           |
|---------------------|-----------------------------|-----------------------------------------------------|------------|----------|-------------|-------------------|-----------------|-------------|---------|-------------|------|--------|-----------|
| Q                   | Primary - Organisation      | Organisation Allocation >> Organisation Appointment | College of | 100.00%  | 12/01/2005  | 01/07/2020        |                 |             | 100.00% | 100.00%     | Ye s | Update | End Track |
| Q                   | Teaching Section - Teaching | Affiliation >> Academic Affiliation                 |            | 100.00%  | 12/01/2005  | 01/07/2020        |                 |             | 100.00% | 100.00%     | Ye s | Update | End Track |
| Q                   | Teaching Section - Teaching | Affiliation >> Academic Affiliation                 |            | 100.00%  | 12/01/2005  | 01/07/2020        |                 |             | 100.00% | 100.00%     | Ye s | Update | End Track |
| Q                   | Teaching Program - Teaching | Affiliation >> Academic Affiliation                 |            | 100.00%  | 12/01/2005  | 01/07/2020        |                 |             | 100.00% | 100.00%     | Ye s | Update | End Track |
| Q                   | Research Section - Research | Affiliation >> Academic Affiliation                 |            | 100.00%  | 12/01/2005  | 01/07/2020        |                 |             | 100.00% | 100.00%     | Ye s | Update | End Track |

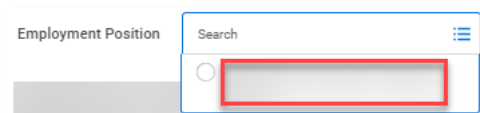
1.6 Enter the **Start Date** as today's date.



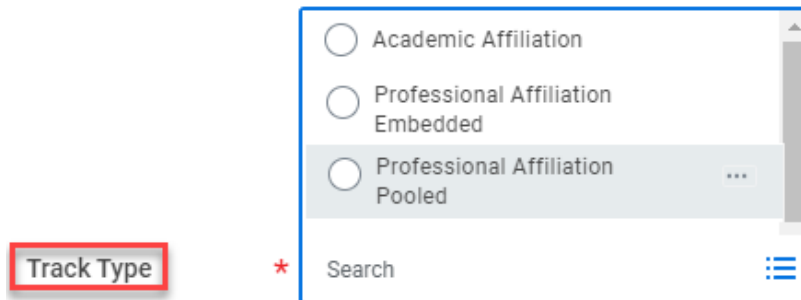
1.7 Select the **Academic Unit** the staff will be affiliated to. Note: you will only see the academic units in which you have access to assign.



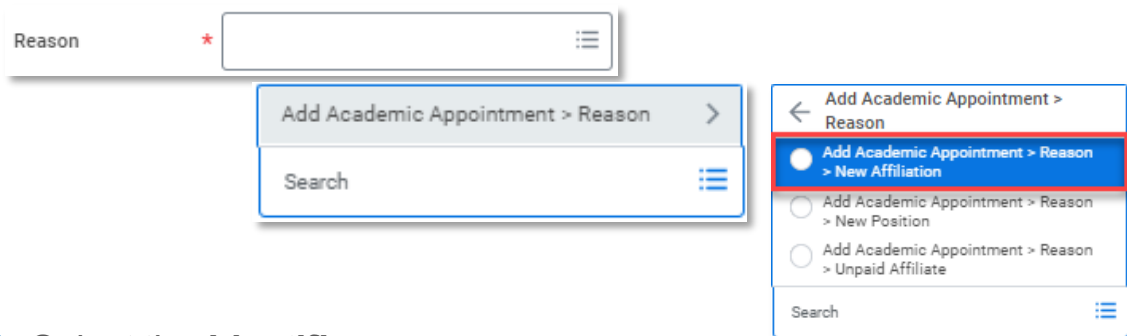
1.8 Select the **Employment Position**. If a staff member has multiple positions, ensure you select the correct position that needs to be affiliated.



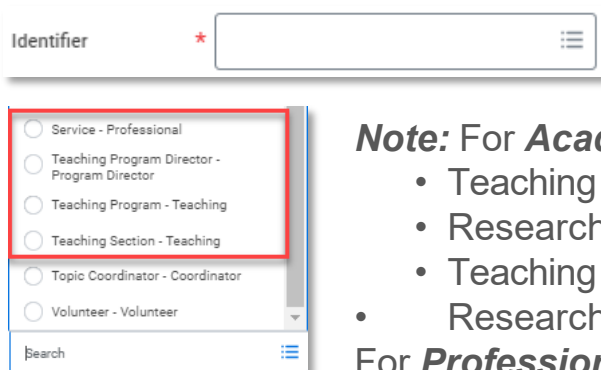
1.9 Select the **Track Type**. Ensure you select either **Academic Affiliation**, **Professional Affiliation Embedded** or **Professional Affiliation Pooled** depending upon the required affiliation.



1.10 Select the **Reason > Add Academic Appointment > New Affiliation**.



1.11 Select the **Identifier**.



**Note:** For **Academic affiliations** select either:

- Teaching program - teaching
- Research section - research
- Teaching section – teaching or
- Research theme. - research

For **Professional affiliations** select :  
Service Professional.

**Note:** The title and End date will default with the current position information.

1.12 Enter in a **Roster percentage**. The percentage is the affiliation allocation for the staff member to the academic unit.

Roster Percent

1.13 Enter in a **comment**.

1.14 Click **Submit**.

1.15 The process will be complete when you see a successful box as per below and you will be directed to the current appointments window. Note: If you see an error, please check all information has been entered correctly, there will be a red box surrounding the error point.

At A Glance Appointments **Current Appointments** Appointments

✔ **Add Academic Appointment**  
[View Details](#)

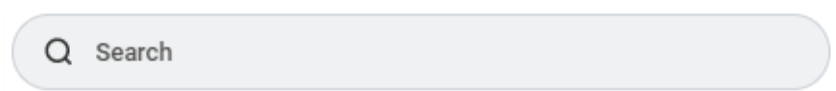
6 items

| Appointer Identifier          | Track Type                                          | Academic Unit | Title           | Roster % | Track Start | Appointment Start | Appointment End | Position Number | Job Profile | HR FTE  |                                                                              |
|-------------------------------|-----------------------------------------------------|---------------|-----------------|----------|-------------|-------------------|-----------------|-----------------|-------------|---------|------------------------------------------------------------------------------|
| Q Primary - Organisation      | Organisation Allocation => Organisation Appointment | College of    | Dean (Research) | 100.00%  | 12/01/2005  | 01/07/2020        |                 |                 |             | 100.00% | <input type="button" value="Update"/> <input type="button" value="End Tra"/> |
| Q Teaching Section - Teaching | Affiliation => Academic Affiliation                 |               | Dean (Research) | 100.00%  | 12/01/2005  | 01/07/2020        |                 |                 |             | 100.00% | <input type="button" value="Update"/> <input type="button" value="End Tra"/> |
| Q Teaching Section - Teaching | Affiliation => Academic Affiliation                 |               | Dean (Research) | 100.00%  | 12/01/2005  | 01/07/2020        |                 |                 |             | 100.00% | <input type="button" value="Update"/> <input type="button" value="End Tra"/> |
| Q Teaching Program - Teaching | Affiliation => Academic Affiliation                 |               | Dean (Research) | 100.00%  | 12/01/2005  | 01/07/2020        |                 |                 |             | 100.00% | <input type="button" value="Update"/> <input type="button" value="End Tra"/> |
| Q Research Section - Research | Affiliation => Academic Affiliation                 |               | Dean (Research) | 100.00%  | 12/01/2005  | 01/07/2020        |                 |                 |             | 100.00% | <input type="button" value="Update"/> <input type="button" value="End Tra"/> |
| Q Service - Professional      | Affiliation => Professional Affiliation             |               | Dean, Research  | 100.00%  | 01/09/2021  | 01/09/2021        | 30/06/2023      |                 |             | 100.00% | <input type="button" value="Update"/> <input type="button" value="End Tra"/> |

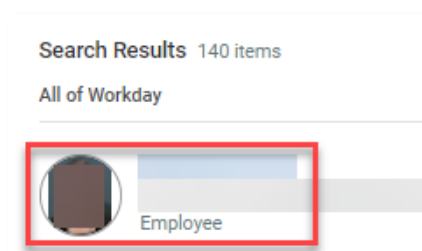
Review the affiliation record has been completed correctly

## 2. Updating Affiliations

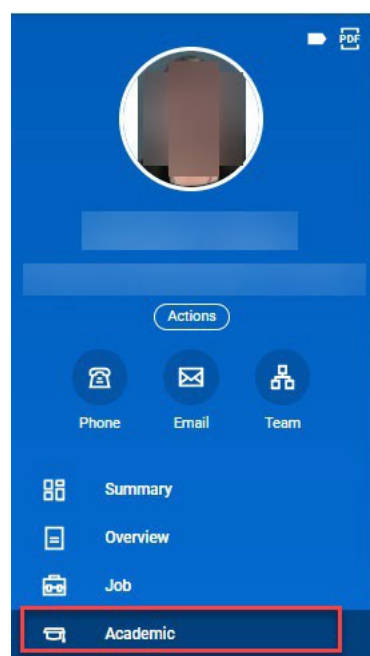
2.1 From the search bar, type in the *name of the worker* to have the affiliation added and click *Enter*.



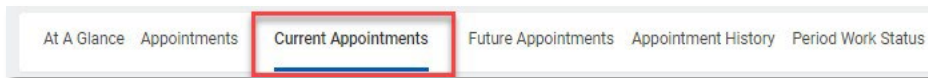
2.2 From the search result, open the worker's profile.



2.3 Select the **Academic** option on the left hand side.



## 2.4 Select the **Current Appointments** tab.



## 2.5 Select the appointment which requires updates and click **Update** on that line item.

| Appointm Identifier | Track Type                  | Academic Unit                                       | Title      | Roster % | Track Start | Appointment Start | Position Number | Job Profile | HR FTE  | Blended FTE | Pay  |        |           |
|---------------------|-----------------------------|-----------------------------------------------------|------------|----------|-------------|-------------------|-----------------|-------------|---------|-------------|------|--------|-----------|
| Q                   | Primary - Organisation      | Organisation Allocation >> Organisation Appointment | College of | 100.00%  | 12/01/2005  | 01/07/2020        |                 |             | 100.00% | 100.00%     | Ye s | Update | End Track |
| Q                   | Teaching Section - Teaching | Affiliation >> Academic Affiliation                 |            | 100.00%  | 12/01/2005  | 01/07/2020        |                 |             | 100.00% | 100.00%     | Ye s | Update | End Track |
| Q                   | Teaching Section - Teaching | Affiliation >> Academic Affiliation                 |            | 100.00%  | 12/01/2005  | 01/07/2020        |                 |             | 100.00% | 100.00%     | Ye s | Update | End Track |
| Q                   | Teaching Program - Teaching | Affiliation >> Academic Affiliation                 |            | 100.00%  | 12/01/2005  | 01/07/2020        |                 |             | 100.00% | 100.00%     | Ye s | Update | End Track |
| Q                   | Research Section - Research | Affiliation >> Academic Affiliation                 |            | 100.00%  | 12/01/2005  | 01/07/2020        |                 |             | 100.00% | 100.00%     | Ye s | Update | End Track |

## 2.6 A pop up window will appear, enter today's date as the **Start Date** for the update to the appointment. Then click **Ok**.

**Update Academic Appointment**

Academic Appointee \* [X] [ ]

Track \* [X] Teaching Program - Teaching - [ ]

Start Date \* DD/MM/YYYY [ ]

**OK** Cancel

- 2.7 Enter in the required change/s for your update. Ensure the **Academic Unit** is correct to the required change along with the correct **employment position, title, end date** and **Roster percentage**.
- 2.8 Under **Reason**, you enter the **Reason > Update Appointment > Position Details Change**.

**Update Academic Appointment** - Academic Affiliation

Start Date \* 01/12/2021

Academic Unit \* [dropdown]

Employment Position \* [dropdown]

**Appointment Information**

Track Teaching Program - Teaching - [dropdown]

Track Start Date 12/01/2005

Track Type \* Academic Affiliation

Track Type Category Affiliation

Reason \* [dropdown]

Rank (empty)

Named Professorship [dropdown]

Appointment Specialty [dropdown]

Constructed Title (empty)

Title \* [dropdown]

End Date DD/MM/YYYY

Identifier \* Teaching Program - Teaching [dropdown]

Submit Save for Later Cancel

Update Academic Appointment > Update Appointment > Update Appointment > Position Details Change



2.9 Enter in any **Comment**, add relevant **Attachments** and select **Submit**.

enter your comment

Attachments

Drop files here

or

Select files

Submit Save for Later Cancel

2.10 The process will be complete when you see a successful box as per below and you will be directed to the current appointments window. Note: If you see an error, please check all information has been entered correctly, there will be a red box surrounding the error point

At A Glance Appointments **Current Appointments** Appointments

✓ Add Academic Appointment  
[View Details](#)

Add

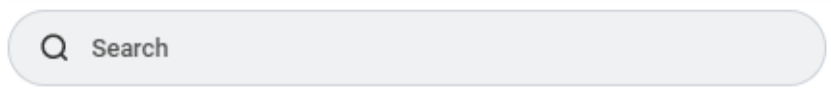
Turn on the new tables view

| Appointer Identifier          | Track Type                                          | Academic Unit | Title           | Roster % | Track Start | Appointment Start | Appointment End | Position Number | Job Profile | HR FTE  | Update | End Tra |
|-------------------------------|-----------------------------------------------------|---------------|-----------------|----------|-------------|-------------------|-----------------|-----------------|-------------|---------|--------|---------|
| Q Primary - Organisation      | Organisation Allocation -> Organisation Appointment | College of    | Dean (Research) | 100.00%  | 12/01/2005  | 01/07/2020        |                 |                 |             | 100.00% | Update | End Tra |
| Q Teaching Section - Teaching | Affiliation -> Academic Affiliation                 |               | Dean (Research) | 100.00%  | 12/01/2005  | 01/07/2020        |                 |                 |             | 100.00% | Update | End Tra |
| Q Teaching Section - Teaching | Affiliation -> Academic Affiliation                 |               | Dean (Research) | 100.00%  | 12/01/2005  | 01/07/2020        |                 |                 |             | 100.00% | Update | End Tra |
| Q Teaching Program - Teaching | Affiliation -> Academic Affiliation                 |               | Dean (Research) | 100.00%  | 12/01/2005  | 01/07/2020        |                 |                 |             | 100.00% | Update | End Tra |
| Q Research Section - Research | Affiliation -> Academic Affiliation                 |               | Dean (Research) | 100.00%  | 12/01/2005  | 01/07/2020        |                 |                 |             | 100.00% | Update | End Tra |
| Q Service - Professional      | Affiliation -> Professional Affiliation             |               | Dean, Research  | 100.00%  | 01/09/2021  | 01/09/2021        | 30/06/2023      |                 |             | 100.00% | Update | End Tra |

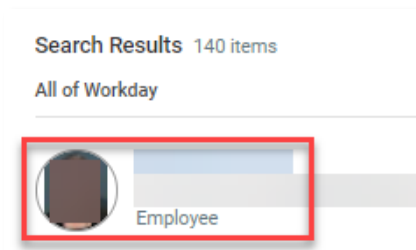
Review the affiliation record has been completed correctly

## 3. Ending Affiliations

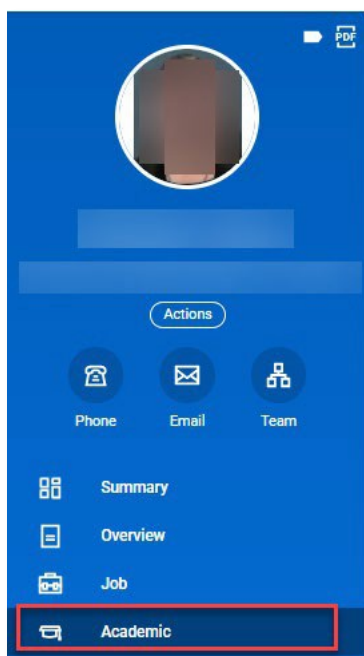
3.1 From the search bar, type in the *name of the worker* to have the affiliation added and click *Enter*.



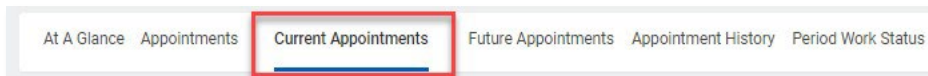
3.2 From the search result, open the worker's profile.



3.3 Select the **Academic** option on the left hand side.



## 3.4 Select the **Current Appointments** tab.



## 3.5 Select the appointment which requires ending and click **End Track** on that line item.

| Appointm | Identifier                  | Track Type                                          | Academic Unit | Title | Roster % | Track Start | Appointment Start | Position Number | Job Profile | HR FTE  | Blended FTE | Pay  |        |           |
|----------|-----------------------------|-----------------------------------------------------|---------------|-------|----------|-------------|-------------------|-----------------|-------------|---------|-------------|------|--------|-----------|
| Q        | Primary - Organisation      | Organisation Allocation >> Organisation Appointment | College of    |       | 100.00%  | 12/01/2005  | 01/07/2020        |                 |             | 100.00% | 100.00%     | Ye s | Update | End Track |
| Q        | Teaching Section - Teaching | Affiliation >> Academic Affiliation                 |               |       | 100.00%  | 12/01/2005  | 01/07/2020        |                 |             | 100.00% | 100.00%     | Ye s | Update | End Track |
| Q        | Teaching Section - Teaching | Affiliation >> Academic Affiliation                 |               |       | 100.00%  | 12/01/2005  | 01/07/2020        |                 |             | 100.00% | 100.00%     | Ye s | Update | End Track |
| Q        | Teaching Program - Teaching | Affiliation >> Academic Affiliation                 |               |       | 100.00%  | 12/01/2005  | 01/07/2020        |                 |             | 100.00% | 100.00%     | Ye s | Update | End Track |
| Q        | Research Section - Research | Affiliation >> Academic Affiliation                 |               |       | 100.00%  | 12/01/2005  | 01/07/2020        |                 |             | 100.00% | 100.00%     | Ye s | Update | End Track |

## 3.6 Enter in Yesterday's date in the **End Date**, select **Reason > End Academic Appointment > Appointment Ceased**. Select **Submit**. You will be taken back to the Current Appointments screen and the academic appointment will no longer be visible. Note: if you use today's date, the appointment will disappear the next working day.

**End Academic Appointment Track**

Prior Appointment

| Appointm | Identifier                  | Academic Unit | Title           | Roster % | Track Start | Appointment Start | Position Number | Job Profile    | HR FTE  | Blended FTE | Pay  |
|----------|-----------------------------|---------------|-----------------|----------|-------------|-------------------|-----------------|----------------|---------|-------------|------|
| Q        | Research Section - Research |               | Dean (Research) | 100.00%  | 12/01/2005  | 01/07/2020        | 7000            | Dean, Research | 100.00% | 100.00%     | Ye s |

**Appointment Information**

Track: Research Section - Research -

Effective Date: 12/01/2005

End Date: \* DD/MM/YYYY

Reason: \* End Academic Appointment > End Academic Appointment > Appointment Ceased

**Additional Information**

Current Appointments: 5  
Future Dated Appointments: 0  
Pending Appointments: 0

Submit Save for Later Cancel