



## **Workday Recruiting User Guide for Staff Positions**

### **What is Workday Recruiting?**

Workday Recruiting is a software solution that works seamlessly with the rest of Workday. It enables us to manage the entire recruiting lifecycle in one system, including workforce planning, sourcing, and advanced talent analytics.

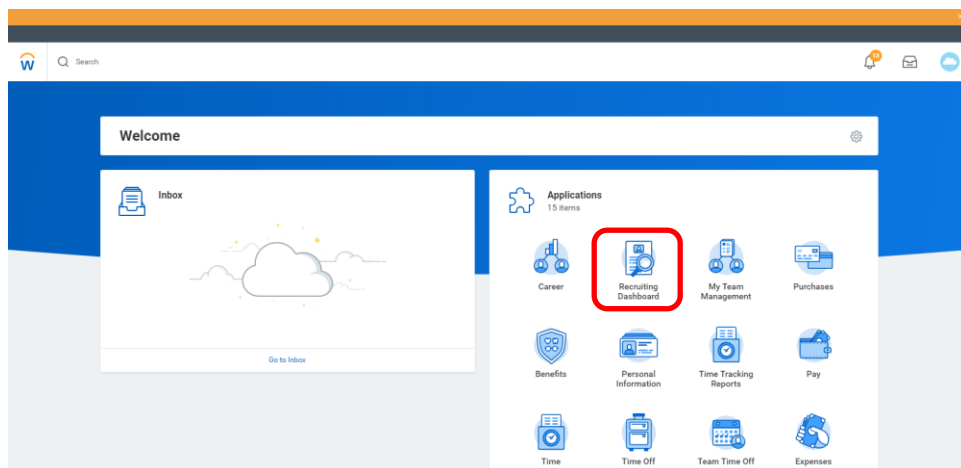
### **Who is this document for?**

The purpose of this document is to instruct hiring managers, department administrators, and members of search committees on a variety of topics including:

- Creating a new job requisition
- Reviewing online applications
- Advancing candidates through the steps of the selection process
- Removing candidates from consideration


### **Logging in to Workday Recruiting**

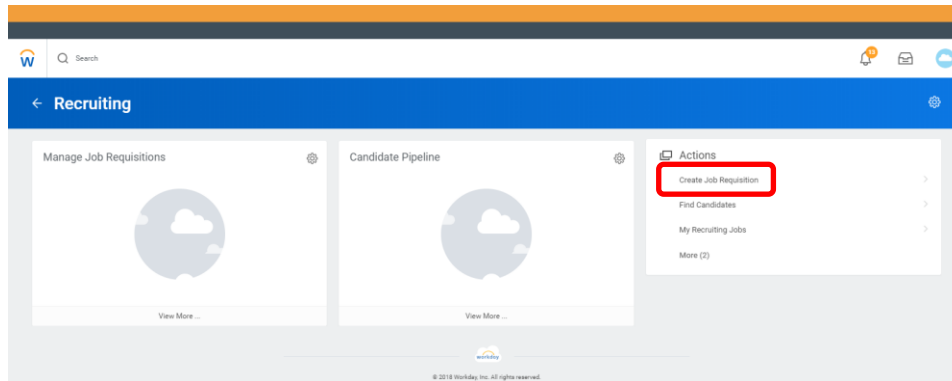
1. Log in to Workday using your standard credentials.
2. The Workday landing page displays icons known as “worklets.” Click the **Recruiting Dashboard** worklet in the *Applications* box.



### **Creating a new job requisition**

1. Log in to Workday.
2. Click the **Recruiting Dashboard** worklet in the *Applications* box.

- Click **Create Job Requisition** in the *Actions* box. Please note, as you create the requisition you will complete a series of screens. Additional help is available within Workday by clicking  located at the top right of the following screens.



- Select the position which you would like to post. The table below contains all fields on this screen and instructions for each. Click **OK** when complete.

Create Job Requisition

Copy Details from Existing Job Requisition

Supervisory Organization \* X Graduate Admissions (PM)

☐ Create New Position  
☒ For Existing Position

X P1296 Lead Operations and Records Assistant

Worker Type \* Employee

OK

Cancel

Create Job Requisition - Start		
Required	Field Name	Instructions
	Copy Details from Existing Job Requisition	Leave blank.
✓	Supervisory Organization	Will pre-populate with your organization. For budgeted staff positions ensure that position management (PM) is selected.
	Create New Position	Do not use.
✓	For Existing Position	Always select <b>For Existing Position</b> . Use the text box to search for and select the

		specific position. This option is always used because whether a hire is a replacement for an employee, or an addition to workforce, the position description will already exist in Workday.
✓	Worker Type	Select <b>Employee</b> from the drop-down menu.

5. Complete the Recruiting Information Screen. The table below contains all fields on this screen and instructions for each. Click **Next** to continue.

Create Job Requisition – Recruiting Information		
Required	Field Name	Instructions
✓	Reason	Select the appropriate option from the drop-down menu: <ul style="list-style-type: none"> <li>• <b>New Position:</b> If addition to workforce</li> <li>• <b>Replacement:</b> If replacing an employee</li> <li>• <b>Re-purposed Replacement:</b> If replacing an employee, but the position has changed to a different position</li> </ul>
	Replacement For	If a replacement position, the name of the previous incumbent will pre-populate.
✓	Recruiting Instruction	Select the appropriate option from the drop-down menu: <ul style="list-style-type: none"> <li>• <b>Do Not Post:</b> Use only if a finalist has already</li> </ul>

		been identified / not an open search <ul style="list-style-type: none"> <li>• <b>Post - External Recruitment:</b> Use if open search</li> <li>• <b>Post - Internal Career Site:</b> Use to post internally</li> </ul>
✓	Recruiting Start Date	Enter the current date or anticipated posting date.
✓	Target Hire Date	Enter a target hire date based on estimated time to fill position.
	Target End Date	

6. Complete the Job Screen. Hiring managers complete only the *Job Details* box. After the requisition is submitted, Human Resources will complete the Questionnaire. The table below contains all fields in the *Job Details* box and instructions for each. Click **Next** to continue.

Create Job Requisition – Job		
Required	Field Name	Instructions
✓	Job Posting Title	N/A. Will pre-populate from the previous screen.
✓	Justification	The job description fields below will pre-populate. Hiring managers should use this field to describe in detail any edits, revisions, or modifications made to the job description. Examples: <ul style="list-style-type: none"> <li>• Increased minimum years of experience to 5 years</li> <li>• Added Master's Degree to preferred qualifications.</li> </ul>

		<ul style="list-style-type: none"> <li>Updated essential functions to include XYZ</li> </ul> <p>Enter “N/A” or “No changes” if no edits, revisions, or modifications have been made.</p>
✓	Job Profile	Use the text box to search for and select a job profile that matches the Job Posting Title field above.
✓	Job Description Summary	Will pre-populate with job description. This is typically an overview of the position.
✓	Job Description	Will pre-populate with job description. This is typically the essential functions of the position.
✓	Additional Job Description	Will pre-populate with additional job description information. This is typically the minimum and preferred qualifications of the position.
	Job Families for Job Profile	Will pre-populate with correct value.
✓	Worker Sub-Type	Select <b>Regular</b> from the drop-down menu unless hiring one of the other types, e.g. <b>Contract</b> , <b>Intern</b> , <b>Student</b> , etc.
✓	Time Type	<p>Select the appropriate option from the drop-down menu:</p> <ul style="list-style-type: none"> <li><b>Full-Time:</b> 35 hours per week (40 for union roles)</li> <li><b>Part-time:</b> Anything less than 35 hours per week</li> </ul>
✓	Primary Location	Will pre-populate with Bentley Campus.
✓	Primary Job Posting Location	Will pre-populate with Bentley Campus.
	Scheduled Weekly Hours	
	Work Shift	

7. Complete the Qualifications Screen. This screen contains a number of text boxes. However, only the Responsibilities box is used. Scroll down to the Responsibilities box and click **Add**.

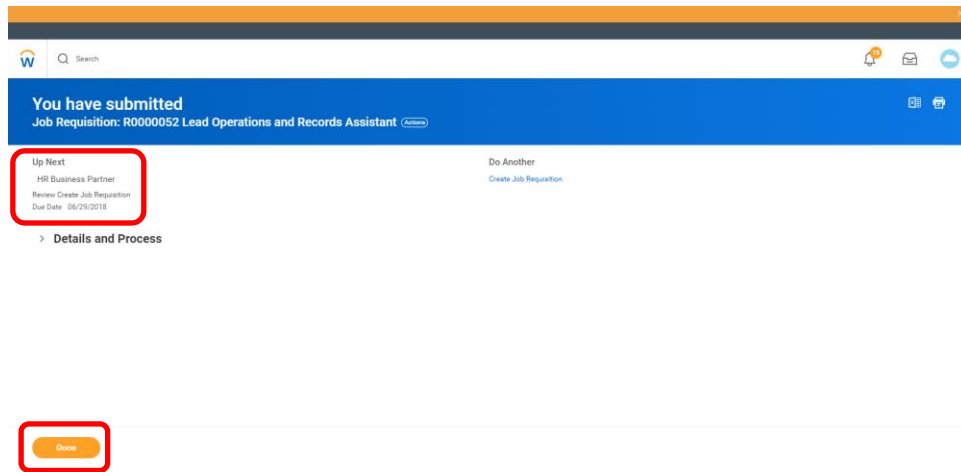
The Responsibilities text field is where hiring managers can add position information specific or unique to their department. This information will be visible on the position posting. Examples:

- “This administrative position focuses on supporting the Human Resources department...”
- “The Senior Assistant Director is part of the international team in Undergraduate Admission with primary responsibility for the Latin American Region...”

Enter any position information specific or unique to your department and click **Next** to continue.

8. Click **Next** to skip past the Organizations screen. The hiring manager does not need to take any action on this screen.
9. The Review screen presents a summary of the position. Scroll down to review all position details. Click the *pencil* button in each section to edit any fields as needed. When in edit mode, an adjacent *arrow* button will appear to save your changes. Alternatively, click the **Guide Me** button to edit each section individually. When complete click **Submit**. The requisition will be forwarded to the next approver in the workflow.

10. A confirmation screen will appear. Please note, confirmation screens in Workday will show you the next approver in the workflow. Click **Done** to continue.



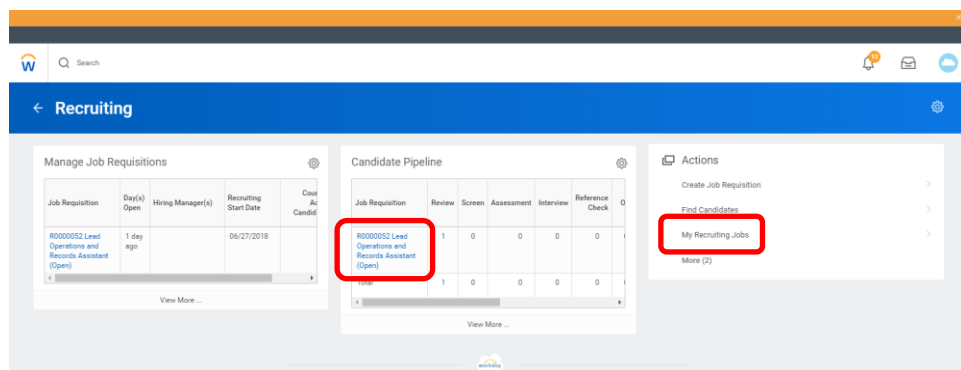
## What happens after a requisition is submitted?

After a requisition is submitted it goes through a series of approvals. Below is a summary of the requisition workflow:

1. **Hiring Manager:** Creates the requisition
2. **Business Partner:** Reviews the position and approves
3. **Compensation:** Enters in relevant compensation information
4. **Budget:** Reviews the position and ensures that it is within budget
5. **Vice President:** Reviews the position and approves
6. **Talent Acquisition Specialist:** Adds search committee members, questionnaires for candidates, and posts the requisition.

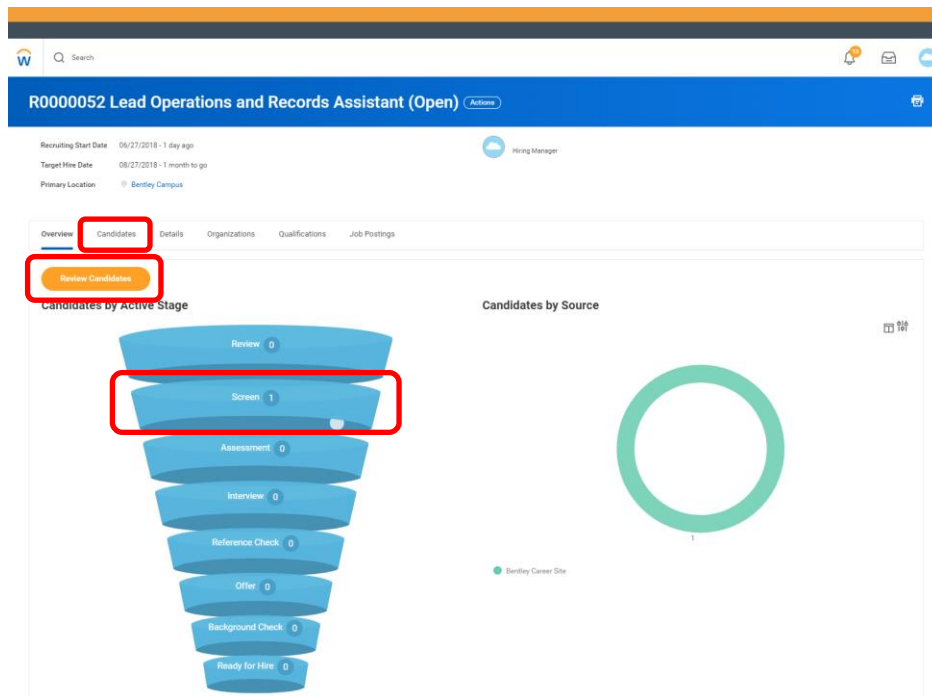
## Reviewing candidates

1. Log in to Workday.
2. Click the **Recruiting Dashboard** worklet in the *Applications* box.
3. Click a Job Requisition or **My Recruiting Jobs** to review candidates. Please note, the default worklets on this screen display the number of candidates at each step of the recruitment workflow.



4. The requisition details screen will appear. Click the **Review Candidates** button or *Candidates* to review online applications.

The *applicant funnel* on this screen provides a graphical representation of the recruitment process and the number of candidates at each step. The table below contains a brief description of each step.



Recruitment Workflow		
Step	Completed By	Description
Review	Recruiter	<p><b><u>PLEASE READ</u></b></p> <p>Candidates are automatically placed in the <i>Review</i> step upon completing their online applications. Candidates are visible to hiring managers at the <i>Review</i> Step. However, hiring managers cannot advance candidates in the selection process, or remove them from consideration, until the Recruiter has moved the candidates to the <i>Screen</i> step below. Recruiters move new candidates to the <i>Screen</i> step at the beginning of each day and again in the afternoon.</p>



Screen	Hiring Manager	Hiring managers review online applications and advance candidates to a phone screen, keep them under review, or remove them from consideration.
Assessment	Hiring Manager	The <i>Assessment</i> step is used to record phone screens and whether they were conducted by the recruiter or hiring manager.
Interview	Hiring Manager	The <i>Interview</i> step is used to record in-person interviews. Workday records first-round interviews and any additional in-person interviews. Please ensure that all first-round interviews, second-round interviews, etc. are recorded.
Reference Check	Hiring Manager	References are completed through our partner SkillSurvey. SkillSurvey is an online platform for conducting reference checks. Reference checks typically take a few business days to complete. The Recruiter will send the hiring manager a report containing detailed feedback from a number of supervisory and peer references.
Offer	Recruiter	Offers of employment are extended by the Recruiter and are made contingent upon successful background check.
Background Check	Recruiter	Background checks are completed through our partner HireRight. Bentley University conducts appropriate background verifications depending on the position type, requirements, and responsibilities.
Ready for Hire	Recruiter	Candidates are ready for hire after successful completion of the background check.

- The Review Candidates screen will appear. Applicants are presented in a table format, and internal candidates are highlighted with **(internal)** after their names. To review application materials, click the **Resume** and **Cover Letter** icons to load the original Microsoft Word or PDF attachments. Alternatively, click the **Quick Resume View** icon and a preview of the resume will appear in a pop-up window.

You can also click the **Eligibility** tab on this screen to see how candidates responded to application questions regarding eligibility to work in the United States and visa sponsorship.

The screenshot displays the 'Review Candidates' interface. At the top, there's a search bar and navigation tabs: 'All Active Candidates', 'Awaiting Action', and 'Extend My Search'. Below this is a table with columns: Candidate, Step / Disposition, Awaiting Me, Awaiting Action, Date Applied, Resume, Quick Resume View - click on icon, Cover Letter, Source, and Jobs Applied to. The first candidate, John Doe (C00000003), is highlighted. Red boxes highlight the 'Resume' and 'Cover Letter' icons in the table, and the 'Quick Resume View' icon in the 'Quick Resume View' column. To the right, a detailed view of John Doe's profile is shown, including his contact information, objective, profile, relevant experience, and a list of skills.

## Dispositioning candidates (advancing or declining Candidates)

The process of advancing candidates to the next step in the selection process, or removing them from consideration, is called *dispositioning*. Dispositioning encompasses the following:

- The highest step in the recruitment process that the candidate has reached.
- The specific reason why the candidate is no longer being considered.

Dispositioning candidates should be completed in real time for reporting purposes. Hiring Managers are expected to disposition candidates at the following steps.

- Screen
- Assessment
- Interview

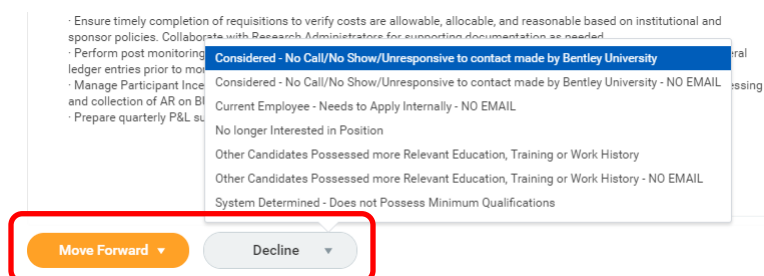
- *Reference Check*

The process for dispositioning candidates is very similar at each step. However, the specific reasons why candidates are no longer being considered may change depending on the step. The process below outlines dispositioning candidates from the *Screen* step.

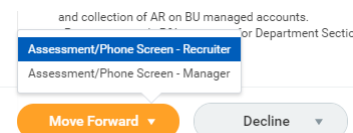
1. Navigate to the Review Candidates screen in a requisition.
2. Click a candidate's name to disposition appropriately. Please note, the candidate's current step is noted in the *Step / Disposition* column.

Candidate	Step / Disposition	Awaiting Me	Awaiting Action	Date Applied	Resume	Quick Resume View	Cover Letter	Source	Jobs Applied to
John Doe (C00000003)	Screen - Manager	Screen	1	07/12/2018			John Doe - Cover Letter.docx	Job Sites - Indeed	0

3. The candidate details screen will appear. Scroll to the bottom of the page and click **Move Forward** to advance the candidate to the next step, or **Decline** to remove the candidate from consideration.



At the *Screen* step, candidates are moved forward to a phone screen. Select the appropriate option for who will be conducting the phone screen. Please note, this will trigger an Action item in the Workday Inbox for the person conducting the phone screen.



After the *Assessment* step is used to record phone screens, the *Interview* step is used to record in-person interviews. Workday records first-round interviews and any additional in-person interviews. Please be sure to select *Additional Interview* to record second-round interviews.

Build on core deliverables to provide enhanced actionable insights and best practices to develop and build on process improvement to gain across cross functional groups to partners of standardized report ap other areas of FP&A to ensure re

Additional Interview  
Reference Check  
Offer

Move Forward ▼ Decline ▼

When declining candidates, the specific reasons why candidates are no longer being considered may change depending on the current step of the workflow process. Disposition candidates appropriately as soon as you know that they are no longer being considered.

· Ensure timely completion of requisitions to verify costs are allowable, allocable, and reasonable based on institutional and sponsor policies. Collaborate with Research Administrators for supporting documentation as needed.  
· Perform post monitoring ledger entries prior to month end  
· Manage Participant Incentives and collection of AR on BI  
· Prepare quarterly P&L statements

Considered - No Call/No Show/Unresponsive to contact made by Bentley University  
Considered - No Call/No Show/Unresponsive to contact made by Bentley University - NO EMAIL  
Current Employee - Needs to Apply Internally - NO EMAIL  
No longer Interested in Position  
Other Candidates Possessed more Relevant Education, Training or Work History  
Other Candidates Possessed more Relevant Education, Training or Work History - NO EMAIL  
System Determined - Does not Possess Minimum Qualifications

Move Forward ▼ Decline ▼

### **PLEASE READ**

Some options in the drop-down menu are repeated twice, with the second one suffixed with “NO EMAIL.” Selecting a regular option without the suffix will trigger an automatic email to candidates indicating that they are no longer being considered. The “NO EMAIL” suffix is used:

- For candidates who have visited campus for an in-person interview
- For candidates who have been notified outside the system.

Candidates who have visited campus for an in-person interview will receive a telephone call from Human Resources to thank them for their time and let them know that we are advancing other candidates in the selection process.

*Please contact your Human Resources Business Partner if you have any questions or require additional assistance.*