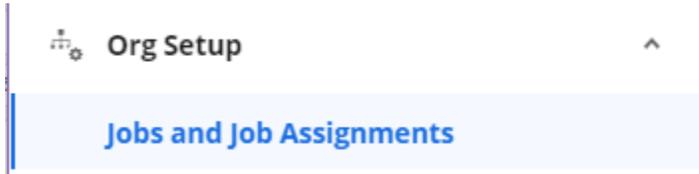


How to add Jobs and Positions into DWFM

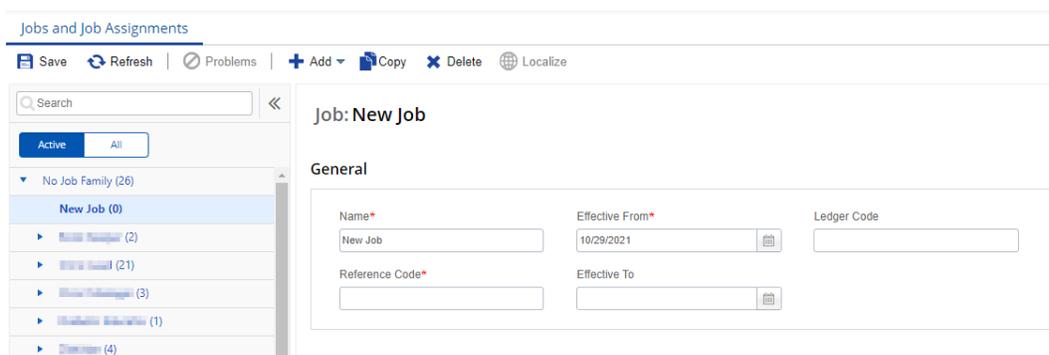
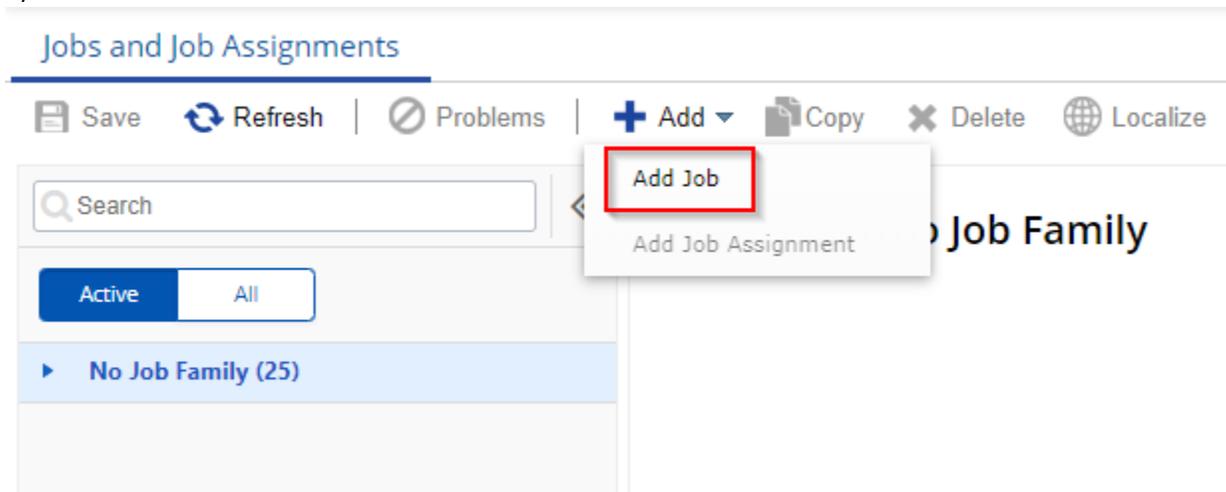
1) From the Menu on the left, navigate to **Org Setup > Jobs and Job Assignments:**



If the Job you want to add the Job Assignment to does not currently exist you will need to add a new one by continuing with Step 2.

If the Job already exists and you simply need to add a new Job Assignment you can skip to Step 5.

2) Click on the **+Add** Icon and then select **Add Job:**



Fill out the General Information as necessary for all required fields *. You can copy and paste the name into the Reference Code box.

NOTE: The Effective From date will automatically populate with the current date, which can be fine if you are not adding a work assignment with this Job that is before this date (backdating a work assignment). However, to avoid future issues we recommend to always modify this date to **1/1/1900**.

4) Save the Job.

5) Add the Job Assignment. Ensure that you have selected the appropriate Job on the Left-hand side to add the Job Assignment to, then click on **+Add** and then select **Add Job Assignment**:

Jobs and Job Assignments

Save Refresh Problems + Add Copy Delete Localize

Search

Active All

No Job Family (26)

*Test Job (0)

Test Manager (2)

Test Lead (21)

Test Manager (3)

Test Manager (1)

Test Lead (4)

General

Name* Effective From*

*Test Job 1/1/1900

Reference Code* Effective To

Test Job

6) A new line will appear with the New Job Assignment Information that you will need to fill out:

Jobs and Job Assignments

Save Refresh Problems + Add Copy Delete Localize

Search

Active All

No Job Family (26)

*Test Job (1)

New Job Assignment No Department

Test Manager (2)

Test Lead (21)

Test Manager (3)

Job Assignment: New Job Assignment

General

Name* Effective From* Reference Code* Ledger Code

New Job Assignment 10/29/2021

Description Effective To Position Term Clock Code

Fill out the General Information as necessary for all required fields *. You can copy and paste the name into the Reference Code box.

NOTE: The Effective From date will automatically populate with the current date, which can be fine if you are not adding a work assignment with this Job Assignment that is before this date (backdating a work assignment). However, to avoid future issues we recommend to always modify this date to **1/1/1900**.

7) Once you have filled out the General Area, you will need to fill out the Assignments Box:

Assignments

Department*

Select an Option...!

Headcount Allocations*

+ Add Copy Delete

Active All

Location*	Effective From*	Effective To	Budget	Actual	Actual (Secondary Only)	Managing Job Assignme...
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Department

The Department Drop-Down box will provide you with a list of all the Departments you have setup in your account, so you will just need to indicate which Department this new Job Assignment should be linked to.

You can add multiple Job Assignments if they are needed in each department.

Headcount Allocations

The Headcount Allocations indicates which Locations employees must be in to be eligible for this Job Assignment to be added to.

a) Click on the **+Add** Icon, you will see a row appear that you can modify:

Assignments

Department*

A Admin

Headcount Allocations*

+ Add Copy Delete

Active All

Location*	Effective From*	Effective To	Budget	Actual	Actual (Secondary Only)	Managing Positions
	6/10/2020					

b) Click in the box under Location, a pop-up window will appear for you to select from your Organization:

Location

Search

+ Corporate

OK Cancel

If this position should be attached to all Locations, click on **Corporate** so that it appears in the drop-down box and Hit **OK**:

Location

Corporate

+ Corporate

OK Cancel

If this position should be attached to only a specific Location, expand Corporate by clicking on the + to the left of the building icon, select the appropriate Location and make sure it appears in the drop-down box before you hit OK.

8) Once you have selected the Location, the pop-up window will close, and you will see the location added to your Assignments.

The Effective From Date will again automatically appear with the current date – just like the Effective From date for the Job and Job Assignments, please modify this date to **1/1/1900**.

Assignments

Department*

A Admin X ▾

Headcount Allocations*

+ Add Copy X Delete Active All

Location*	Effective From*	Effective To	Budget	Actual	Actual (Secondary Only)	Managing Positions
Corporate	1/1/1900					

9) Save and Refresh

You can now navigate to your People Screen to assign this Position to employees – if you do not see it right away you will need to refresh your People screen and/or log out and log back in.