

# Swap feature Overview

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## Short description

The Swap Positions feature in Workday allows managers and system administrators to efficiently reassign workers to new positions, either individually or as part of a mass action.

Swap positions features simplifies the process of reallocating workers within an organization by overcoming common challenges associated with traditional methods, such as creating temporary positions. By facilitating seamless position swaps, Workday decreases administrative workload, reduces human errors, and increases organizational flexibility.

Some of the key benefits are as follows:

- **Efficient Worker Reassignment:** Swap multiple worker positions in a single transaction, saving time and reducing manual effort.
- **Accurate Worker Histories:** Eliminate the need for temporary positions as placeholders, ensuring that job histories remain clear and correct.
- **Customizable Reasons for Swaps:** Organizations can configure various reasons for position swaps to align with their internal processes and policies, providing clarity and context for changes.
- **Reduced Administrative Errors:** Streamline the process to minimize clerical errors associated with manual data entry and position changes.
- **Flexibility for Organizational Changes:** Adapt quickly to changing business needs, whether during reorganizations, rotations, or other workforce adjustments.

# Swapping employment positions in Workday

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## Short description

Use the Swap Positions feature to efficiently reassign workers to new positions, either individually or in bulk. This process helps streamline reorganization efforts and reduce manual errors.

## Before you begin

Ensure the following:

- You have system administrator access in Workday to perform this action.
- Workers selected for the swap have matching job profiles.

## Procedure

1. Locate the workers for position swaps:
  - a. Navigate to the *Find Workers* report and search for workers.

**Note:** You can use the text field to search or the available filters to narrow down your search. You can use the following filters:

- Location
- Job profile
- Supervisory organization

Workday dynamically updates the worker list and displays facet value counts to help you refine the search and identify relevant workers.

- b. To add workers to your swap list, select one or more workers and click **Add to Swap Positions List**. This button may have a custom colour depending on your tenant settings. For more information, see [Tenant settings in Workday](#).

**Step Result:** The *Add to Swap Positions List* task opens.

2. Verify the list of workers in the *Add to Swap Positions List* task and click **OK**.

3. Navigate to the *Swap Positions* task and enter the required information:
  - a. Select the **Effective Date** for the swap to take effect.
  - b. Select the appropriate **Reason** for the swap. Reasons are defined for your organization in the *Maintain Event Categories and Reasons* task. For more information, see Organizational events categories in Workday.
  - c. **Choice 1:** Check the **Use Swap Positions List** checkbox to select your **Swap Positions List**.

OR

**Choice 2:** If you do not have a predefined list to perform the swap action, enter the desired role in the **Event title** field to identify and swap workers one-at-a-time.

4. In the *Swap Positions* task, assign a new position to each worker in the **Proposed Position** section.
5. **Optional:** Add a comment regarding your configured changes.
6. Click **Submit**.

**Result:** The selected workers are successfully reassigned to their new positions.