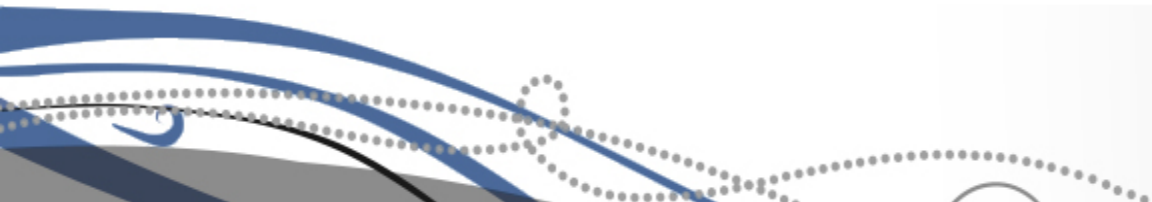


# **Welcome to HR Partners!**

*January 20, 2015*



# TEN THINGS YOU MUST KNOW IF YOU WANT TO BE A WORKFORUM GURU

# #1

## Defaulting Your User Type at Login

# #1: Defaulting Your User Type at Login

- If you have multiple user types in WorkforUM, but you use one of them much more often than the others, the system can remember a certain role every time you access the system.
- Follow these steps:
  - Login to the system.
  - Click *My Profile*.
  - Next to *User Details*, click *Edit*.
  - Next to *Preferred Group on Login*, choose your preferred default user type.
  - Click *Update User*.

# #1: Defaulting Your User Type at Login

The screenshot shows the 'WORKFORUM' user home interface. The top navigation bar includes 'Home', 'Postings', 'Pools', 'Applicants', 'Hiring Proposals', and 'My Profile' (which is circled in red). The 'My Profile' link is highlighted with a red circle. Below the navigation bar, the user is logged in as 'Danny Linton' with the role 'System Administrator'. The main content area displays a 'Welcome to WORKFORUM' message, an 'Alerts' section with one alert from the administrator, an 'Inbox' section with zero items, and a 'Watch List' section with two items. The right sidebar contains 'Shortcuts' and 'My Links' sections.

WORKFORUM :: User Home :: P... x

https://memphis-sb.peopleadmin.com/hr/

THE UNIVERSITY OF MEMPHIS

Inbox PeopleAdmin

Watch List APPLICANT TRACKING

Home Postings Pools Applicants Hiring Proposals My Profile Help

Danny Linton, you have 0 messages. System Administrator Logout

Welcome to **WORKFORUM**

**Alerts** (1 alert from the administrator)

Type	Message
	Departmental users will now see a "Pools" tab in the menu of the Applicant Tracking module of WorkforumUM. This tab is used exclusively to track the applications for the University's generic pools for temporary employees. These pools are for "view only" and no actions in the system are required. PLEASE NOTE: To see if your temporary employee has submitted his/her application, you can click the "More Search Options" link on the Applicants tab and search for their first or last name. If you have any questions, please contact Danny Linton at 678-4970.

**Inbox** (0 items need your attention)

Displaying items for group "System Administrator".

Postings (0) Users (0) Hiring Proposals (0) Actions (0) Special Handling Lists (0)

Job Title	Type	Current State	Owner
-----------	------	---------------	-------

**Watch List** (2 items)

Postings (2) Hiring Proposals (0) Actions (0)

**Shortcuts**

- [View Failed Document Conversions Report](#)
- [Create New Hourly, Monthly & Administrative Executive Posting](#)
- [Create New Full-Time Faculty, Academic Executive, & Contract Coaches Posting](#)
- [Create New Part-Time Faculty Posting](#)
- [Create New Temporary Posting](#)
- [View Scheduled Report Output](#)
- [My Reports](#)

**My Links**

**Workforum Training & Documentation**

- [Introduction to the System](#)
- [Requesting to Fill an Existing Regular Position](#)
- [Requesting a New Position](#)
- [Requesting to Reclassify/Retitle an Existing Position](#)
- [Tracking, Reviewing, & Processing Applicant Pools](#)
- [Hiring an Applicant and Completing a Hiring Proposal](#)
- [Changing a Position's Supervisor](#)
- [Part-Time Faculty](#)

**Organizational Charts on Demand**

- [Search for an Organizational Chart](#)

# #1: Defaulting Your User Type at Login

The screenshot shows the PeopleAdmin interface for The University of Memphis. The user profile for Daniel Linton (dmlinton) is displayed. The 'User Details' tab is selected, and the 'Edit' link is circled in red. The account information table is as follows:

Field	Value
External Authentication Key	dmlinton
First Name	Daniel
Last Name	Linton
Email	emailaddress@zed.zed
Employee Id	U00001734
Username	dmlinton
Org Unit Ids	University of Memphis

# #1: Defaulting Your User Type at Login

WORKFORUM :: User Edit :: Peo...  
https://memphis-sb.peopleadmin.com/hl/users/258/edit?tab=1

THE UNIVERSITY OF MEMPHIS

Inbox | PeopleAdmin  
Watch List | APPLICANT TRACKING

Home | Postings | Pools | Applicants | Hiring Proposals | My Profile | Help

Daniel Linton, you have 0 messages. System Administrator | logout

Users / Edit

Editing: User

Update User Cancel

Required fields are indicated with an asterisk (\*).

Account Information

- External Authentication Key: dmlinton
- First Name: Daniel
- Last Name: Linton
- Email: emailaddress@zed.zed
- Employee Id: U00001734
- Username: dmlinton
- Org Unit Ids: University of Memphis (Root)
- Preferred Group On Login: System Administrator (selected)

Preferences

Default Product Module: Applicant Tracking

Time zone: (GMT-06:00) Central Time (US & Canada)

Update User Cancel

# #2

## Finding Your Lost “Move in Workflow” Link



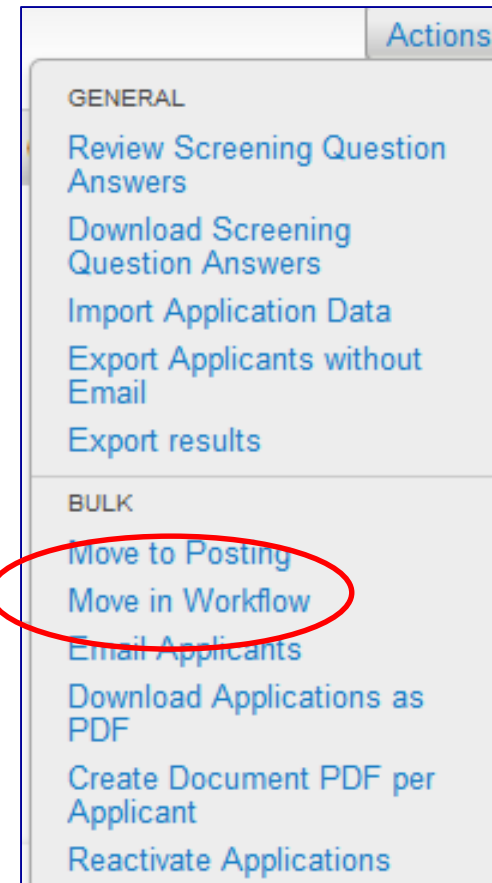
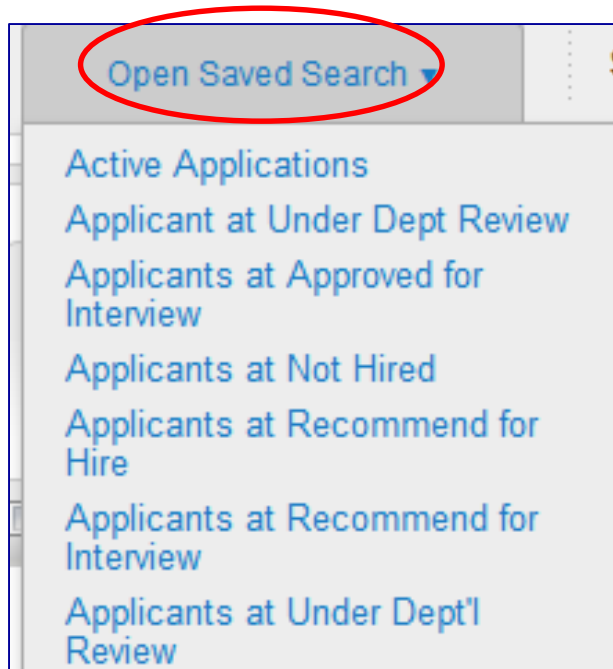
## #2: Finding Your Lost “Move in Workflow” Link

- The first time you review your posting’s list of applicants, the *Move in Workflow* link shows up under the main *Actions* button.
- However, after at least one candidate is moved to a status besides *Under Review By Department*, the *Move in Workflow* link can disappear. This is because you now have different applicants in the list at different statuses, and you don’t own all of those statuses.

## #2: Finding Your Lost “Move in Workflow” Link

- There’s an easy way to get your *Move in Workflow* link back!
- Just select the *Open Saved Search* menu on the left, and choose to view all applicants at a single status. This restores your *Move in Workflow* link.
- Keep in mind that the *Assistant* user type cannot access the *Move in Workflow* link.

## #2: Finding Your Lost “Move in Workflow” Link



# #3

## Alerting OIE When Ready to Interview

## #3: Alerting OIE When Ready to Interview

- WorkforUM sends out automated e-mail notifications at almost every point as you requisition, recruit and hire.
- However, there is one crucial point in the process where you need to communicate outside the system!
- When you move your selected applicants to *Recommend for Interview* status, you will need to manually e-mail Institutional Equity (oie@memphis.edu) to alert them that your pool needs to be approved. Include the posting number please!
- Another OIE reminder: don't forget to complete the *Applicant Pool Certification* and *Final Pool Analysis* sections before finalizing your posting.

# #4

**WorkforUM Security = Banner Finance Security**

## #4: WorkforUM Security = Banner Finance Security

- WorkforUM security is inherited from Banner Finance security. If there is an org you don't have in WorkforUM, that means you also don't have it in Banner Finance.
- Here's the breakdown:

Banner Finance	WorkforUM
Financial Manager	Department Authority
Designee	Department Authority
Approver	Assistant
Non-Approver	Assistant

## **#4: WorkforUM Security = Banner Finance Security**

- To add, change, or remove Banner Finance (and thus WorkforUM) security, complete the *Request for Access to Business & Finance Systems* form (online at [bf.memphis.edu/forms/tech/bf\\_access\\_request.htm](http://bf.memphis.edu/forms/tech/bf_access_request.htm)).
- Forms should be submitted to 311 Scates Hall.
- Updated security will take effect in WorkforUM the day AFTER it is entered into Banner.



# #5

## Creating & Using Saved Searches

## #5: Creating & Using Saved Searches

- We've tried to make the default screens in WorkforUM list the information you're most likely to need.
- However, if there's a data element you'd like to see that's not currently showing up, you can add it yourself and then save that search for the next time you're in the system.

## #5: Creating & Using Saved Searches

- On any screen in the system listing search results (position list, applicant list, posting list, etc.), click the *More Search Options* link next to the main *Search* box.
- You can use the *Add Column* dropdown box to add data elements to your search results.
- You can also select a certain status or statuses or a certain department or departments.
- If you want to use the same search again later, click *Save this Search?* and name it. It will be there the next time you use WorkforUM.

# #6

**Never Move a Candidate to “Hired”**

## #6: Never Move a Candidate to “Hired”

- Never, ever, ever, ever, ever move a candidate to the status of ***Hired***.
- If you have decided on a candidate to whom you would like to make an offer of employment, you always move them to *Recommend for Hire*.
- It's only at *Recommend for Hire* status that you get the opportunity to start a hiring proposal. Moving a candidate directly to *Hired* skips the hiring proposal, and that's a no-no! If you accidentally do this, call us.
- When your hiring proposal is approved, your candidate will automatically be moved to ***Hired*** status.

# #7

## The “List of Positions” Screen with Hiring Proposals

## #7: The “List of Positions” Screen with Hiring Proposals

- When you have a candidate at *Recommend for Hire* status and you click the *Start Hiring Proposal* link, the first screen that appears is a big list of positions (instead of a hiring proposal). This confuses some users.
- This screen is asking you to identify the specific position number into which you will be placing this new hire.

## **#7:** The “List of Positions” Screen with Hiring Proposals

- If you are filling the same position number that appeared in your posting, go to the very bottom and click *Select Position*.
- If you are filling a different position number than the one that was posted, click the radio button next to that position, and then click *Select Position* at the bottom.



# #8

## Tricking the System When It Insists on a Posting Date

## #8: Tricking the System When It Insists on a Posting Date

- When processing a Reclassification action, you are asked *Does a posting need to be created for this action?*.
- However, even if you say *No*, the system still then later requires the *Recommended Posting Date* field.
- How to get around this? Just make up a nonsense date like 01/01/1900. We'll know.

# #9

## The Postings Menu vs. The Pools Menu

## #9: The Postings Menu vs. The Pools Menu

- Now that temporary employees are being advertised in WorkforUM, you've got a new menu in your Applicant Tracking module. It's important to know the difference between your *Postings* menu and your *Pools* menu.
- The *Postings* menu houses:
  - Hourly/Monthly/Administrative Executive postings
  - Full-Time Faculty/Academic Executive/Contract Coach postings
  - Part-Time Faculty postings
- The *Pools* menu houses:
  - Temporary postings only
- Trying to access the wrong posting type under the wrong menu will give you an error.

# #10

## Coding Your Part-Time Faculty Pools

# #10: Coding Your Part-Time Faculty Pools

- Attention academic departments: keep in mind that your part-time faculty postings close annually on January 31.
- Within the first few days of February, please code all of your applicants as either *Offered Position* or *Not Hired*. This includes any applicants that you may have had at other statuses throughout the year.
- You will be contacted in February for any potential changes to your department's posting(s), which go live March 1.

# #10 1/2

**Don't Be Afraid to Ask for Help!**

# Don't Be Afraid To Ask for Help!

- [workforce@memphis.edu](mailto:workforce@memphis.edu)
- [facultyservices@memphis.edu](mailto:facultyservices@memphis.edu)
- [oie@memphis.edu](mailto:oie@memphis.edu)
- [danny@memphis.edu](mailto:danny@memphis.edu)
- Workforum training is offered throughout the year
- Sign up in Learning Curve
- PDF documentation is also available



# TigerPerks

- [bf.memphis.edu/hr/benefits/discounts.php](http://bf.memphis.edu/hr/benefits/discounts.php)



The screenshot shows a web browser displaying the TigerPerks page. The address bar shows [bf.memphis.edu/hr/benefits/discounts.php](http://bf.memphis.edu/hr/benefits/discounts.php). The page header includes the University of Memphis logo and the text "Division of Business and Finance University Benefits Administration". A search bar is located in the top right corner. The left sidebar contains a navigation menu with links such as "Meet the Director", "Info for Prospective Employees", "Info for New Faculty", "Info for New Staff", "Info for Current Employees", "Info for Departing Employees", "Info for Retiring Employees", "Related Resources & Links", "Tiger Perks (Employee Discounts)", "Benefits Internal Use [Login]", "Forms", "Policies, Procedures & Guidelines", "myMEMPHIS", "tigerText", and "QUICK LINKS". The main content area features a "Tiger Perks" banner with a paw print logo and a "2014 Healthier Tennessee Workplace" award. Below the banner, there is a "Please note" section and a "Tiger Perks Application" form. A "Select a category:" dropdown menu is visible, with options for "Attraction/Entertainment", "Food", "Online", and "Products/Services". The "Category: ATTRACTION/ENTERTAINMENT" section is expanded, showing details for the "C.H. Nash Museum at Chucalissa" and "Memphis Grizzlies".

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Dreamers. Thinkers. Doers.

Division of Business and Finance  
**University Benefits Administration**

Search Criteria  GO

Business & Finance » Human Resources » University Benefits Administration » Tiger Perks

### Tiger Perks

Please note: the following discounts may vary and are subject to change or cancellation without notice.

If you are vendor or business interested in offering a discount, please complete the [Tiger Perks Application](#) form and submit via e-mail to [benefits@memphis.edu](mailto:benefits@memphis.edu).

Select a category:

- Attraction/Entertainment
- Food
- Online
- Products/Services

Sign up to get Tiger Perks updates!

Email address

☐ Subscribe ☐ Unsubscribe

Category: ATTRACTION/ENTERTAINMENT

**C.H. Nash Museum at Chucalissa**  
1987 Indian Village Dr., Memphis, TN 38109  
The C. H. Nash Museum at Chucalissa, offers free admission to U of M employees. Employees must present U of M ID Card at time of visit. For more information, please call (901) 785-3160.

**Memphis Grizzlies**  
We are pleased to offer you a special opportunity to purchase discounted tickets to select Memphis Grizzlies' games for the 2014-15 season. As a member, you can save big money off the regular gate price and cheer your home team on to victory! The link below will shut off at 12PM on your selected game date and each month new games will be uploaded so you can take advantage of this offer. How to order tickets in these easy steps: Order your tickets online - It's fast and secure. Follow these simple steps and take advantage of this special offer. 1. Visit our purchase page: <http://tinyurl.com/Grizzlies>. 2. Type MEMPHIS into the "Special Offer Code" box and click "Verify". 3. If you have an account, use your e-mail address and password. If not, go to "Create an Account" box on the right hand side, type your e-mail address and click "Sign Up Now." 4. Select your seats and tickets will be e-mailed to you. No Ticketmaster fees.  
Questions? Please contact Jonathan Jones at 901.205.1436 or via e-mail at [jjones@grizzlies.com](mailto:jjones@grizzlies.com)  
[Orlandovacation.com](http://Orlandovacation.com)

# Temporary Employee Orientation Comments