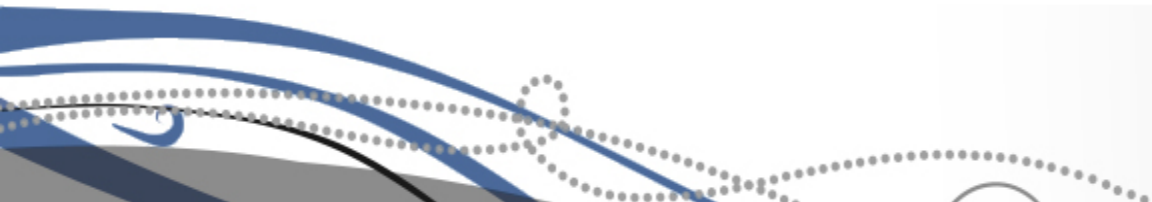# Welcome to HR Partners!
January 20, 2015

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

#1

Defaulting Your User Type at Login

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#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*.**

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#1: Defaulting Your User Type at Login

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#1: Defaulting Your User Type at Login

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#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.

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#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.

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#2: Finding Your Lost "Move in Workflow" Link

Open Saved Search ▾

Active Applications

Applicant at Under Dept Review

Applicants at Approved for Interview

Applicants at Not Hired

Applicants at Recommend for Hire

Applicants at Recommend for Interview

Applicants at Under Dept'l Review

Actions

GENERAL

Review Screening Question Answers

Download Screening Question Answers

Import Application Data

Export Applicants without Email

Export results

BULK

Move to Posting

Move in Workflow

Email Applicants

Download Applications as PDF

Create Document PDF per Applicant

Reactivate Applications

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#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 <u>manually</u> 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.

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#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

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#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).**

- **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.

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#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.

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#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.

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#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.

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#8

Tricking the System When It Insists on a Posting Date

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#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.

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#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

- 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.

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Don't Be Afraid To Ask for Help!

- workforce@memphis.edu

- facultyservices@memphis.edu

- oie@memphis.edu

- danny@memphis.edu

- Workforum training is offered throughout the year

- Sign up in Learning Curve

- PDF documentation is also available

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TigerPerks

- **bf.memphis.edu/hr/benefits/discounts.php**

Temporary Employee Orientation Comments