THE UNIVERSITY OF
MEMPHIS®

WorkforUM Training
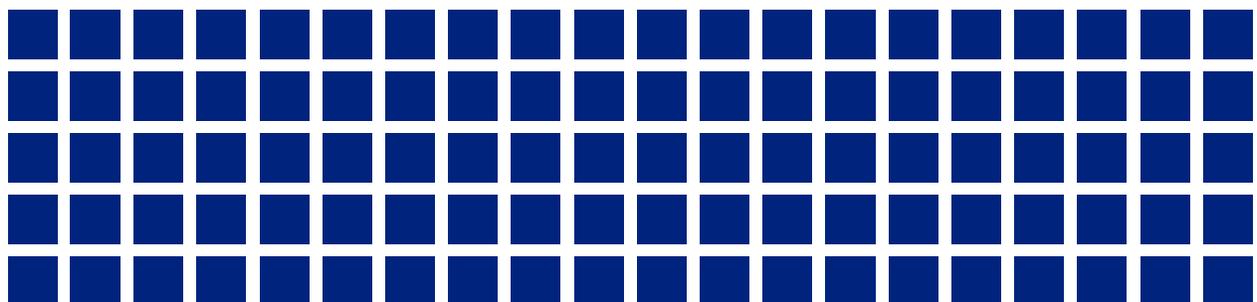## Part 1: Introduction to the System

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Overview

WorkforUM is the University's online position management, applicant tracking, electronic onboarding, and faculty performance appraisal system. In WorkforUM you may complete any of the following actions:

- Requesting to fill an existing regular position

- Requesting the creation of a new regular position

- Requesting the reclassification of a regular position (may or may not include a change in salary)

- Tracking the applicant pool for a position you have requested to fill

- Selecting an applicant to hire for a regular position for which you have responsibility

- Changing the supervisory position for a position in your department

- Recruiting a part-time faculty member who has not taught for the University within the last two (2) calendar years

- Reviewing the existing job descriptions for regular positions either in your department or across the University

- Tracking your area's employment and selection statistics

- Reviewing archival information related to hiring in your department

- Collecting the application materials of a temporary employee

- Recording and routing a faculty performance appraisal.

System Features

WorkforUM offers a number of significant improvements to the applicant tracking process that make it far preferable to maintaining a paper system. These features include:

- Paperless

- Submit, view, & track all application materials (initial request to fill, applications, resumes, reference letters, etc.) all electronically

- Applicants' credentials saved and re-usable across multiple applications

- Automatic e-mail notifications

- Online approvals

- Applications accepted 24/7/365

- Job postings can be immediate upon approval

- Easier tabulations of required information to Institutional Equity

- Easier distribution of applicant materials to search committees

- Safe & secure

Upgrade Features

The WorkforUM upgrade, launched in November 2012, offers a robust series of enhancements, including:

- Back button can be used

- Spell check

- In box

- Specific e-mail notifications

- Toggle option between user types

- Audit trails that highlight changes between users

- Documents saved instantly

- Posting notification options for applicants

- Ability to e-mail a posting to a friend

- Online help searchable by keyword

- Files can stay in original format (e.g. Excel can stay in Excel)

- Applicants can "attach" URLs instead of documents

- Specific documents and/or posting specific questions can be requested at later date from finalists only rather than entire large pool

Accessing WorkforUM

To access WorkforUM, go to your MyMemphis portal at https://my.memphis.edu. Log in with your standard UUID and password. Under the **Employee** tab, there is a channel titled **WorkforUM**.

Internal users may click on the **Internal Site** link to access the system to request actions, review pools, and create hiring proposals, etc. You will be automatically signed-in to WorkforUM with no need to enter your credentials again. (Direct link: http://workforum.memphis.edu/hr)

The **External Site** link will direct users to the Job Postings site where the general public can browse and apply for the University's current job postings. Postings can be searched for in a number of ways via the search tools on this site. (Direct link: http://workforum.memphis.edu)

The **Guest User Site** link is to be used by individuals without normal access to a given organization whom you may designate as needing access for a specific position/action. After the position has been posted, the appropriate users with access may be notified of a special set of login credentials that can be communicated to such guest users. Departmental hiring managers control when these guest user credentials are communicated. (NOTE: In the event of any system issues with the single sign-on functionality for the **Internal Site** link above, internal users can also use the Guest User Site to login to WorkforUM using their standard UUID and password.) (Direct link: http://workforum.memphis.edu/hr)

The Faculty Evaluations link is used by faculty members to access, complete, and approve faculty performance appraisals. Please note that WorkforUM is only used for faculty appraisals, not staff appraisals.

This system is available 24/7/365 from anywhere with Internet and Web browser access.

Position-Based Actions

There are nine (9) position-based actions that users may begin within WorkforUM. These actions are broken down into groups of three based on whether the position is hourly/monthly, faculty, or executive/special class. Depending on which action is selected, a workflow of approval levels will be required to review and certify that given request.

- Staff, Administrative Executive, & Contract Coach Positions
    - Request to Fill Existing Position
    - Request New Position
    - Request to Reclassify Existing Position
    - Request to Change Position Supervisor
- Full-Time Faculty & Academic Executive Positions
    - Request to Fill Existing Position
    - Request New Position
    - Request to Retitle Existing Position
    - Request to Change Position Supervisor
- Part-Time Faculty Positions*
    - Request New Position

*NOTE: At present, WorkforUM is only being used to recruit new part-time faculty positions and these postings are automatic. Departments will NOT complete a Request to Fill or Hiring Proposal actions in the Part-Time Faculty process.

Positions such as graduate assistants and student workers are not processed using WorkforUM. Temporary employees only use WorkforUM to receipt their applications.

User Types

There are sixteen (16) different user roles in WorkforUM. Depending on his/her security status, a user may have one or more than one of these roles within the system.

- **Assistant.** Those employees who are designated as Approvers or Non-Approvers in Banner Finance are automatically created as Assistants in WorkforUM for the same organization codes. Assistants can start actions in WorkforUM but cannot approve them.

- **Departmental Authority.** Those employees who are designated as Financial Managers or Designees in Banner Finance are automatically created as Departmental Authorities in WorkforUM for the same organization codes. Departmental Authorities can start actions, approve assistant actions, and route them to the next appropriate level in the system.

- **Approving Authority.** In academic departments, the Approving Authority correlates to those users with the Dean's level of approval. In non-academic departments, the Approving Authority correlates to those users with the Director's level of approval; therefore, in many non-academic departments, the Approving Authorities are often the same users as the Departmental Authorities. In these cases, it is key to realize that in some instances, users may be routing transactions to themselves, depending on what level they performed an action originally.

- **Executive Authority.** In academic departments, the Executive Authority correlates to those users with the Provost's level of approval. In non-academic departments, the Executive Authority correlates to those users with the Vice President's level of approval.

- **OIE.** The employees of the Office for Instiutional Equity have University-wide access to WorkforUM, with which these users can review all requests to fill, new positions, reclassifications, job postings, applicant pools, interview requests, and hiring proposals.

- **CFO.** The University's Chief Financial Officer and designees. The CFO is notified and must approve any new position request for faculty or staff.

- **President.** A small group of employees in the President's office have University-wide access in the system to review any action, position, or hiring proposal. For new positions, the President role is part of the standard approval workflow.

- **Budget Authority.** The employees of the Financial Planning and Grants & Contracts offices function as Budget Authorities within WorkforUM. This University-wide level of access allows the Budget Authority to review and approve all budgetary documents related to the creation of any new or reclassified position.

- **Human Resources.** Human Resources users are responsible for reviewing requests to fill, posting all regular hourly/monthly and executive/special class positions, and finalizing the selection of a chosen candidate within WorkforUM. Users in the Employment section of Human Resources have access to every action, position, and hiring proposal in the system; however, HR Employment is not involved in the faculty hiring process. (See Academic Affairs below.)

- **Department HR.** The Department HR user type has all of the same functionality as the Human Resources user type but is restricted to a given set of organizations. This is

generally held for HR generalists who work within a department outside of Human Resources.

- **HR Compensation.** Users assuming the Compensation function of HR Workforce Management have a role which allows them to review and approve hiring proposals' salary information in the system, as well as gives them the ability to process and approve requests for position reclassifications.

- **Academic Affairs.** A small group of employees within Faculty Administrative Services have the Academic Affairs role. These users are responsible for the posting of all full-time and part-time faculty positions, as well as finalizing the selection of chosen full-time candidates within WorkforUM. Academic Affairs users can view all transactions in the system, though only in academic departments.

- **System Administrator.** This user is responsible for maintenance and support for the WorkforUM system and has full access to all areas of the system.

- **Appraisal Admin.** Users with administrative access to all faculty performance appraisals.

- **Position View.** All WorkforUM users have this user type, which provides read-only access to all position descriptions at the University.

- **Employee.** All WorkforUM users have this user type, which provides read-only access to that employee's specific position description.

Additional Training

This concludes this training session. Further training is available for the following topics.

- Introduction to the System

- Requesting to Fill Existing Positions

- Requesting to Create a New Position

- Requesting to Reclassify/Retitle an Existing Position

- Tracking, Reviewing, and Processing Applicant Pools

- Hiring an Applicant and Completing a Hiring Proposal

- Changing a Position's Supervisor

- Part-Time Faculty