Workforum Training
Part 7: Changing a Position’s Supervisor
Table of Contents

Table of Contents ............................................................................................................................ 1
Summary ......................................................................................................................................... 3
Request to Change Supervisor Action ............................................................................................ 3
Additional Training ......................................................................................................................... 5
Summary

Coinciding with the Workforum upgrade in November 2012, the University will be debuting a new Web site from which departments can generate organizational charts on demand. The charts will pull information from the Banner system including position number, incumbent employee and job title. These organizational charts may be navigating both downwards and upwards, going all the way up to the president of the University.

In the event that an inaccuracy is found and/or reorganization occurs, University departments will need a method to request changes to the structures displayed on these charts. These requests will be fielded via a Request to Change Supervisor action within Workforum.

Request to Change Supervisor Action

To begin completing a Request to Change Position Supervisor, you may wish to begin by verifying that you are logged in under the appropriate user type. In the upper-right of the Workforum screen, your current role is specified in a dropdown box at the top. If you need to change user type, select a different role from the dropdown box and click the refresh arrow.

Please note that only Assistants, Department Authorities, and Human resources can initiate these requests.

To start your Request to Change Position Supervisor, you will need to navigate to the Position Management module of the system. This module always features a header image that is orange in color. In the far upper-right portion of the screen, choose Position Management from the dark-colored dropdown box. Selecting this option will reset the screen to the “orange side” of the system.

Across the top center menu, roll your mouse over the Positions tab. A fly-out menu will appear, and from this menu you will either select Hourly, Monthly, & Administrative Executive OR Full-Time Faculty, Academic Executive, or Contract Coaches. Clicking either of those options will produce a search results list with all corresponding positions to which you have access. Locate the position whose supervisor you are interested in changing and click that position’s title in the first column. (You need not click the checkbox.)

After selecting the position of your choice, the full position description on file is retrieved. You may review this description to ensure you have selected the appropriate position. In the upper-right section of the screen, you will see a list of available actions to take on this position. In this case, you would select the Request to Change Position Supervisor option. Doing so gives you a warning message that proceeding will lock this position to other actions until this action is completed. Acknowledge that message by clicking Start, and then you are in the body of the actual request.

You will see a series of read-only tabs related to the position and the employee. Proceed to the Supervisor tab and select the position that your choice will now report. Click Next to review, and then route to the next appropriate level.

All regular positions in Workforum, regardless of being faculty or staff, have requests to change their supervisory positions routed to Human Resources. Very few approvals are required, and each request will follow this simple workflow details below.
Request to Change Position Supervisor Workflow

*Assistant (secretary) → *Departmental Authority (Dept head or chair) → *Human Resources → Request to Change Position Supervisor Approved

*Action may be started at ANY of these levels

Please keep in mind that the organizational chart Web site will reflect your change the day AFTER your request is approved by Human Resources.
Additional Training

This concludes the training session on Requests to Fill. Further workForum 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
- Part-Time Faculty