EMPOWERING WOMEN
FOR DIGITAL & REMOTE HR CAREERS

MODULE 3 · HR Data, AI Literacy, and Digital Systems · LESSON 3.2

Choosing and configuring digital tools for HR workflows

Learn to map HR workflows, define tool requirements, and compare digital solutions to reduce manual work and increase practical use.



1.25 training hours · Phase 1 · RemoteHeR

WHAT THIS LESSON COVERS

From Workflow to Tool

- **Start with the Workflow**: Understand the process before deciding which digital tool is needed.
- **Define Requirements**: Separate essential functions from useful extras and identify practical constraints.
- **Consider the users:** Think about who will use the tool, what they need and how the tool will fit their work.
- **Compare solutions**: Use evidence and a simple matrix to compare different tools rather than choosing by appearance.
- **Test before launch**: Check the proposed solution against realistic tasks before relying on it.



Choose the solution after you understand the work.

Start by describing what happens now, who does it, what information is needed, and where delays or errors occur. Only then define what a digital tool should improve.

Make the workflow visible

Map the Current Process

1. **Identify the starting point**
   Define what begins the process, such as a new vacancy, an employee request, or a completed application.
2. **Follow each action**
   Record what happens next, who performs the action, and what information is created or used.
3. **Mark the handovers**
   Note where information moves between people, files, or systems and where delays or errors can occur.
4. **Identify the pain points**
   Highlight repeated manual work, duplicate entry, unclear responsibilities, missing information, or unnecessary waiting.

From problem to requirement

Where could a tool help?

Repeated data entry

Candidate information is entered manually in more than one place. A suitable tool could reduce duplicate entry.

Waiting for updates

Recruiters have to ask for status information because applications are tracked in separate files.

Difficult searching

Relevant applications are difficult to identify because information is stored inconsistently.

Manual handovers

Information has to be copied from recruitment into another process after a candidate is hired.

Do not stop at the problem

Pain Point or Requirement?

⚠ Pain Point

- Recruiters enter the same information several times.
- Application status is difficult to see.
- Important information is hard to find.
- Handovers take unnecessary time.

Tool Requirement

- Candidate data can be reused across relevant steps.
- Users can see and update application status.
- Users can search defined candidate information.
- Relevant information can move into the next process.

Not every feature has equal importance

Must-Have or Nice-to-Have?

Must-Have

- supports a critical step in the workflow
- meets a required data or security need
- can be used by the intended users
- without it, the process would not work as needed

Nice-to-Have

- makes the workflow more convenient
- adds useful reporting or presentation options
- could improve the experience but is not essential
- the process can still work without it

Functional Requirements

What should the tool do?

Find information

The tool should allow users to find the information they need for the workflow without unnecessary manual searching.

Manage workflow stages

Users should be able to see and update the relevant stages or status of the process.

Move information

The tool should support the required transfer of information to another step or system.

Support decisions

The tool should provide the functions users need to complete their work accurately and consistently.

Non-Functional Requirements

How should the tool work?

Usability

The tool should be understandable and practical for the people who will use it regularly.

Security and Access

Users should only have the access they need, and information should be handled appropriately.

Compatibility

The solution should work with the relevant systems, devices or technical environment.

Reliability

The tool should perform consistently enough for the workflow it is intended to support.



The best tool for the process may not be the best tool for the user.

Consider who uses each part of the workflow, how often they use it, what they need to understand and what could make the process difficult for them.

The right people need the right information

Data, Access, and Connections

Data needs

- What information must the tool collect or store?
- Which fields are required for the workflow?
- Which information needs to move elsewhere?
- How should information be structured?

Access needs

- Who needs to see each type of information?
- Who needs to create or edit records?
- Which users should have limited access?
- What should happen when responsibilities change?



A tool can only improve the workflow if it fits the wider system.

Think beyond one system. Check whether information needs to move to or from another HR system, spreadsheet, or business application, and whether that connection is actually supported.

Buying the tool is not the end

Configuration as Part of the Solution

1. **Set up the workflow**
   Configure stages, fields, responsibilities, and rules to reflect the process.
2. **Set access**
   Give users the permissions they need for their role and restrict access where appropriate.
3. **Check the data structure**
   Make sure fields, categories, and required values support the way information needs to be used.
4. **Test the workflow**
   Run realistic examples from beginning to end before relying on the configured system.



Test the tasks users actually need to complete.

A demonstration is not a test. Use realistic scenarios to check whether information is captured correctly, users can complete their tasks, permissions work as expected, and required handovers succeed.

Turn requirements into evidence

Compare the Options

Use the same requirements

Apply the same criteria to every tool so the comparison is meaningful.

Look for evidence

Use documentation, demonstrations, or practical tests rather than relying only on claims.

Record limitations

A tool can meet many requirements and still have important gaps.

Consider the trade-offs

The strongest overall option may not be the one with the highest number of features.

A selection matrix makes the decision visible.

List the requirements, compare each tool against them, record evidence and limitations, then explain why the recommended option fits the workflow.





A score helps you compare, it does not make the decision for you.

A tool may score well overall but fail one critical requirement, therefore you should always look at the individual requirements and ask whether the trade-offs are acceptable.

Apply the method

Tinted Glass's Decision

Tool A

- covers the required recruitment stages
- easy for recruiters to understand
- supports the required candidate fields
- has limited integration with the existing HRIS

Tool B

- covers the required recruitment stages
- needs more setup for recruiters
- supports the required candidate fields
- provides the necessary HRIS connection

A decision starts the work

From Selection to Implementation

1. **Confirm the recommendation**
   Check that the chosen option meets the essential requirements and that important limitations are understood.
2. **Configure the workflow**
   Set up the fields, stages, permissions, and connections needed for the actual process.
3. **Test realistic cases**
   Use representative tasks and data to check the configured workflow before launch.
4. **Review and improve**
   Capture problems from early use and adjust the configuration or process where appropriate.

NOW IT IS YOUR TURN

Tool Selection Matrix

Compare digital tools against the same HR workflow requirements.

Use the supplied workflow, requirements, and tool profiles. Classify each requirement using evidence, record limitations, and recommend one option with a short explanation. You have 25 minutes.

It feeds into

the tool-selection reasoning in the written account of your Module 3 artefact.

Read by your tutor

No mark, no score and no ranking. Your tutor reads your work and may give you feedback.

RECAP

Before you move on

- A good tool decision starts with understanding the HR workflow rather than choosing a product first.
- Requirements should describe what the solution needs to do and how it needs to work in practice.
- Must-have requirements should be separated from useful but non-essential features.
- Users, data, permissions, and system connections all affect whether a tool is suitable.
- A selection matrix supports judgement by making evidence, limitations, and trade-offs visible.

Complete the knowledge check, then continue to Lesson 3.3: Working with HR data.

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Lesson 3.2 complete

The activity gives you structured practice in selecting a digital HR tool based on workflow requirements rather than personal preference or feature lists.

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