reach ATS®

User Guide

Managing Workflows

Prepared By: **Reach Support**

CONTENTS

1. About Workflows

A **Workflow** is the defined set of stages of the recruitment process that a candidate passes through until they are eventually hired or rejected from the vacancy.

The workflow consists of two distinct sections:

- Candidate application form
- Recruiter stages

Within each stage of the process, the HR user has complete control over the activities they want to occur including:

- Form sections and questions that are included in the online application form
- Set killer questions (*i.e. picklist answers that disqualify the candidate)*
- Set scoreable questions (*i.e. picklist answers to score candidate's suitability*)
- Set any automated emails to the candidate
- Recruitment process stages
- Set hiring manager screening forms
- Set HR recruiter forms (*e.g. schedule interview, setup offer letter etc.*)
- Set merge documents to be produced automatically
- Set additional candidate forms (*e.g. medical declaration, payroll details etc.*)
- Set automated reference check requests and submissions
- Set automated internal emails (*e.g. new starter IT requirements etc.*)

Once a workflow has been created, it is available to process candidates for any live vacancy.

For instance, if a 'Senior Management Workflow' has been created, this flow can be attached to any individual vacancy (*e.g. a Marketing Manager vacancy*). Candidates applying for this role will follow both the online application form questions and the recruitment process that HR have specified is to be used for a senior management position.

For complete flexibility, you can create workflows of different types to process different types of candidates. Examples include:

- External workflows *(to process candidates that apply from an external source*)
- Internal workflows (*to process candidates that currently work for the organisation*)
- Agency workflows (*to process agency submissions*)
- Paper form workflows (*to process scanned copies of paper application forms*)

There is no limit on the number of workflows that can be created.

Workflows are accessed and managed from the **Workflow Library**.

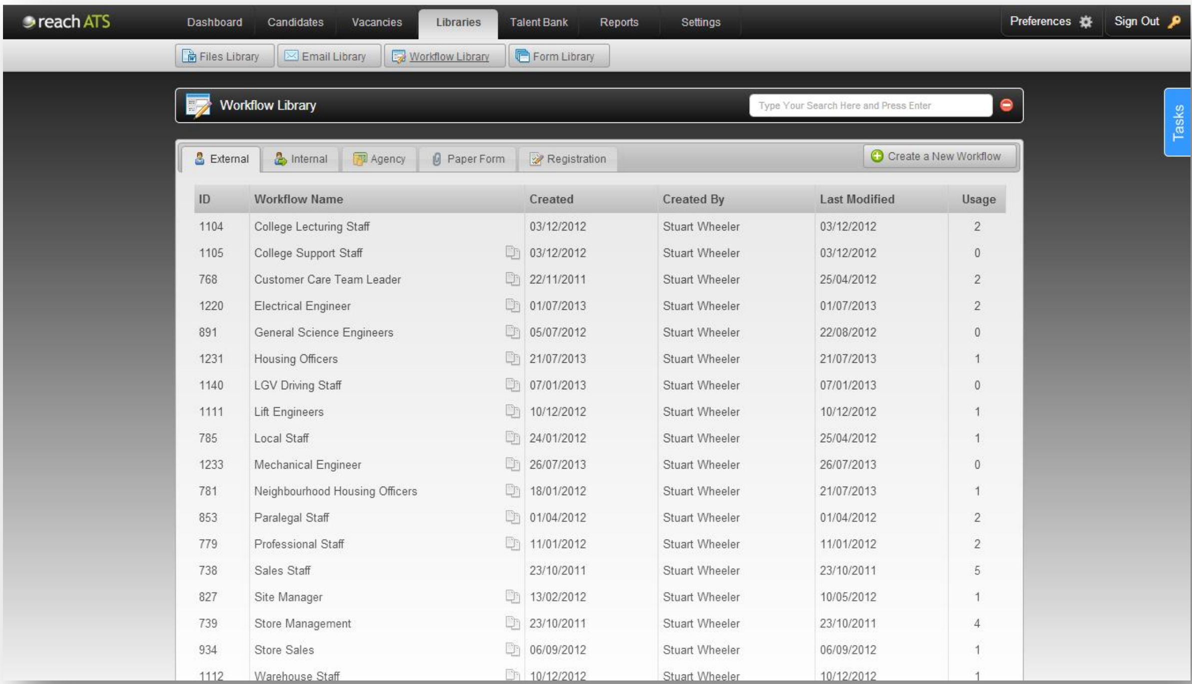
2. Workflow Library

The workflow library contains all of the workflows that have been created by your organisation, organised by type.

To access the Workflow Library:

1. Click the **Libraries** tab
2. Click **Workflows**

Figure 1: ***Click Libraries to access the Workflow Library***



Each tab contains workflows that process candidates from a specific source type:

External flows process candidates that apply from any external source including your own website, press ads, jobsites, social media, career fairs, job centres etc.

Internal flows process candidates that currently work for the organisation.

Agency flows process candidates that have been submitted to the organisation via a preferred agency supplier.

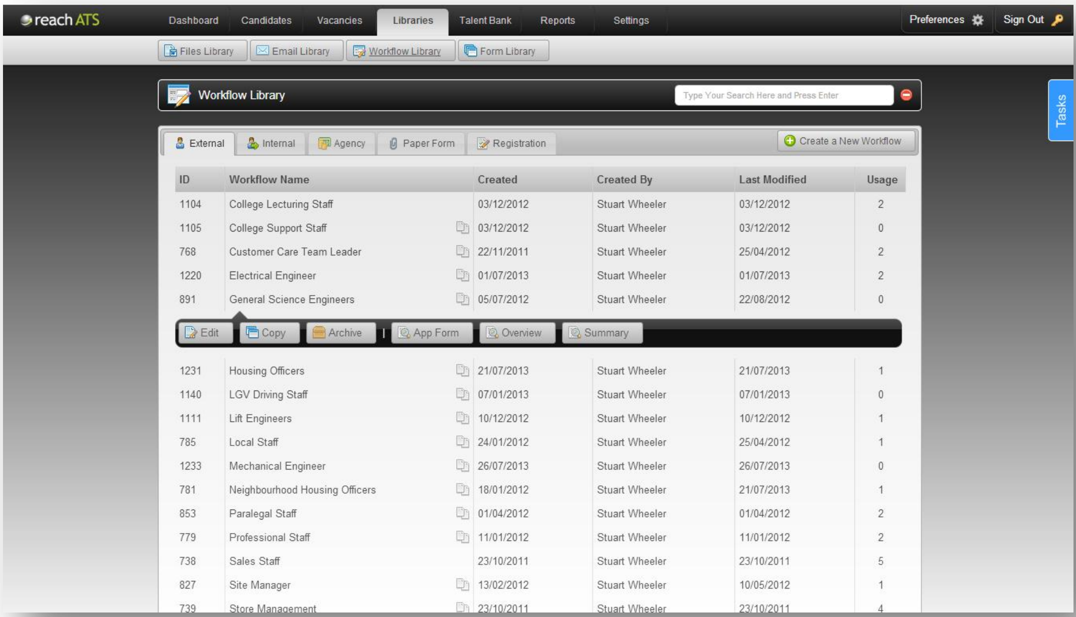
Paper Form flows are used to process candidates that have completed their application form offline and posted it into the organisation. The HR Administrator enters key details into a shortened workflow for paper based applications and has the option to upload a scanned copy of the completed paper form.

Registration flows process candidates that click the ‘register with us’ button on your website.

Please note that you can have as many workflow types for your organisation as you need - contact Reach Support to request new types at any time.

Click the workflow name to open the options bar.

Figure 2: Workflow options bar



The first three buttons allow you to edit, copy or archive the workflow.

The second three buttons provide an overview of the workflow process.

Figure 3: Click 'App Form' to see a preview of the candidate online application form

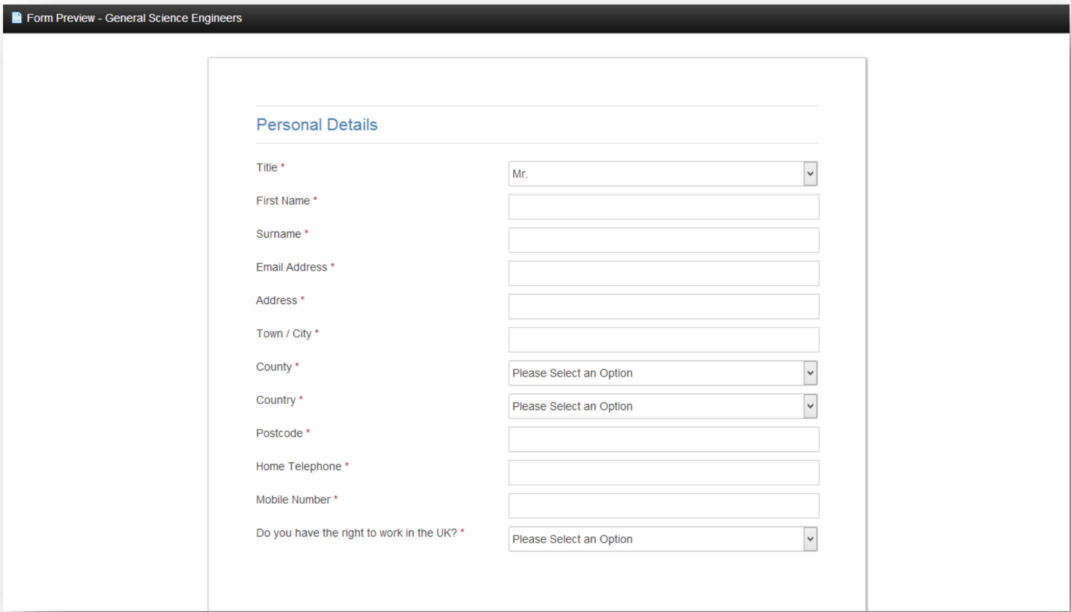
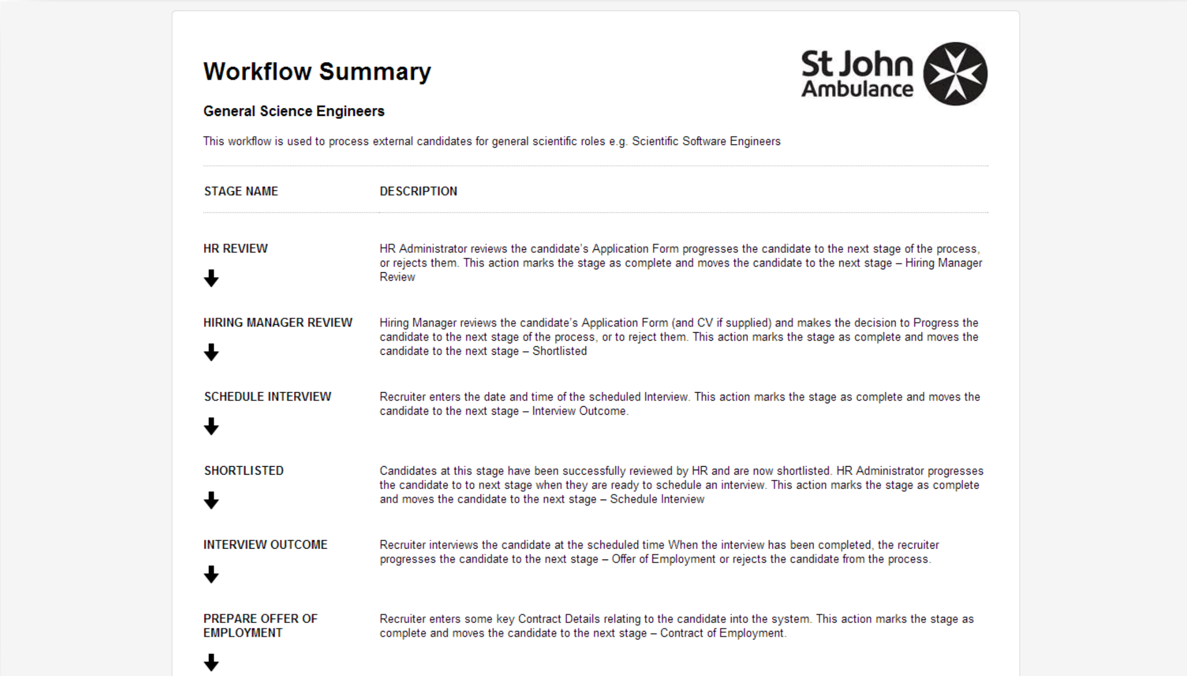


Figure 4: Click 'Summary' to see descriptions of each stage of the recruitment process



Workflow Summary

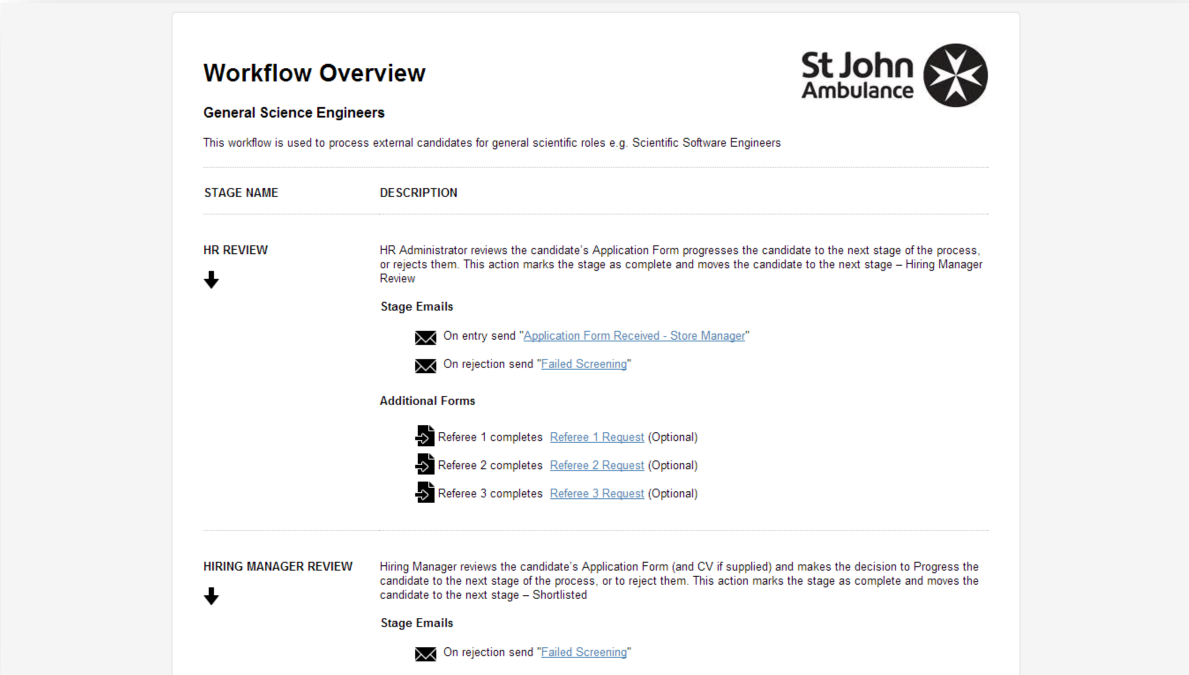
St John Ambulance

General Science Engineers

This workflow is used to process external candidates for general scientific roles e.g. Scientific Software Engineers

STAGE NAME	DESCRIPTION
HR REVIEW	HR Administrator reviews the candidate's Application Form progresses the candidate to the next stage of the process, or rejects them. This action marks the stage as complete and moves the candidate to the next stage – Hiring Manager Review
HIRING MANAGER REVIEW	Hiring Manager reviews the candidate's Application Form (and CV if supplied) and makes the decision to Progress the candidate to the next stage of the process, or to reject them. This action marks the stage as complete and moves the candidate to the next stage – Shortlisted
SCHEDULE INTERVIEW	Recruiter enters the date and time of the scheduled Interview. This action marks the stage as complete and moves the candidate to the next stage – Interview Outcome.
SHORTLISTED	Candidates at this stage have been successfully reviewed by HR and are now shortlisted. HR Administrator progresses the candidate to to next stage when they are ready to schedule an interview. This action marks the stage as complete and moves the candidate to the next stage – Schedule Interview
INTERVIEW OUTCOME	Recruiter interviews the candidate at the scheduled time When the interview has been completed, the recruiter progresses the candidate to the next stage – Offer of Employment or rejects the candidate from the process.
PREPARE OFFER OF EMPLOYMENT	Recruiter enters some key Contract Details relating to the candidate into the system. This action marks the stage as complete and moves the candidate to the next stage – Contract of Employment.

Figure 5: Click 'Overview' to see each stage of the recruitment process inc. emails and activities



Workflow Overview

St John Ambulance

General Science Engineers

This workflow is used to process external candidates for general scientific roles e.g. Scientific Software Engineers

STAGE NAME	DESCRIPTION
HR REVIEW	HR Administrator reviews the candidate's Application Form progresses the candidate to the next stage of the process, or rejects them. This action marks the stage as complete and moves the candidate to the next stage – Hiring Manager Review **Stage Emails** On entry send "Application Form Received - Store Manager" On rejection send "Failed Screening" **Additional Forms** Referee 1 completes Referee 1 Request (Optional) Referee 2 completes Referee 2 Request (Optional) Referee 3 completes Referee 3 Request (Optional)
HIRING MANAGER REVIEW	Hiring Manager reviews the candidate's Application Form (and CV if supplied) and makes the decision to Progress the candidate to the next stage of the process, or to reject them. This action marks the stage as complete and moves the candidate to the next stage – Shortlisted **Stage Emails** On rejection send "Failed Screening"

To change the name of the workflow, click **Edit** in the options bar and then **Properties**.

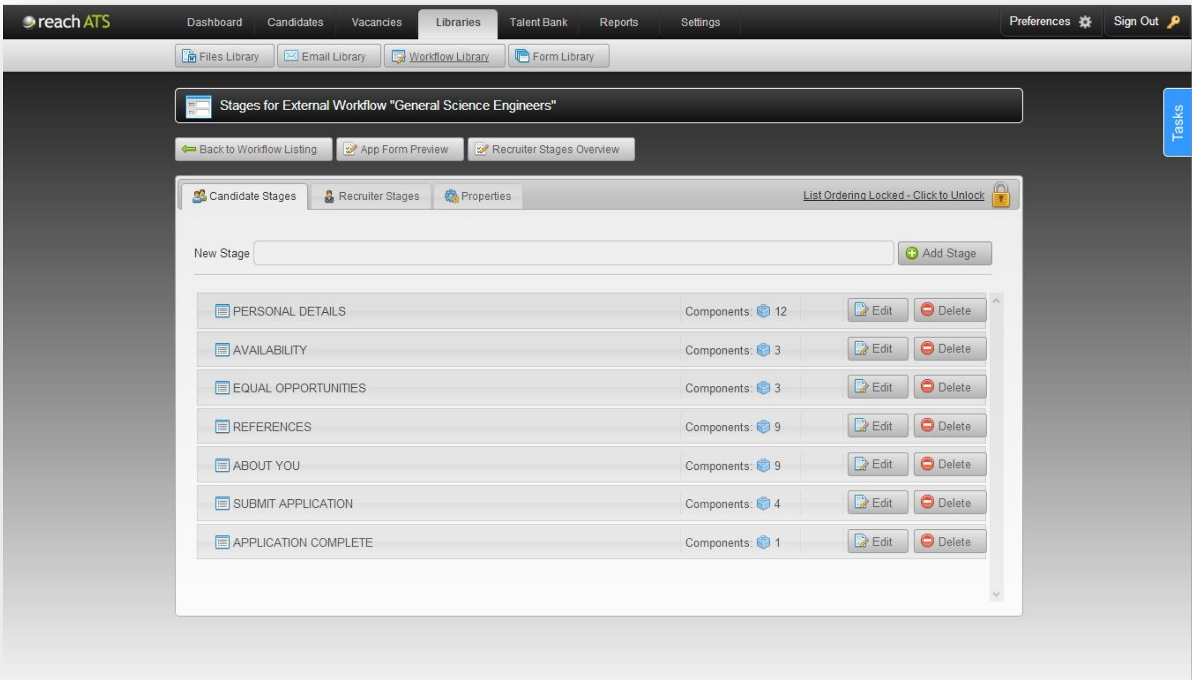
Replace the current workflow name and then press **Save Properties**.

3. Candidate Stages

To review the candidate stages for any workflow, click **Edit** in the options bar.

The candidate stages tab will be displayed on screen. Click **App Form Preview** at any time.

Figure 6: Workflow candidate stages



Each stage is a section of the online application form that will be completed by the candidate.

By default, the stages will be locked to prevent form sections being moved unintentionally. To turn on drag & dropping of the stages, click **List Ordering Locked - Click to Unlock** (and click the link again to lock).

- To add a new stage, type the stage name into the new stage box and then **Add Stage**. Drag and drop the new stage to the position required within the form.

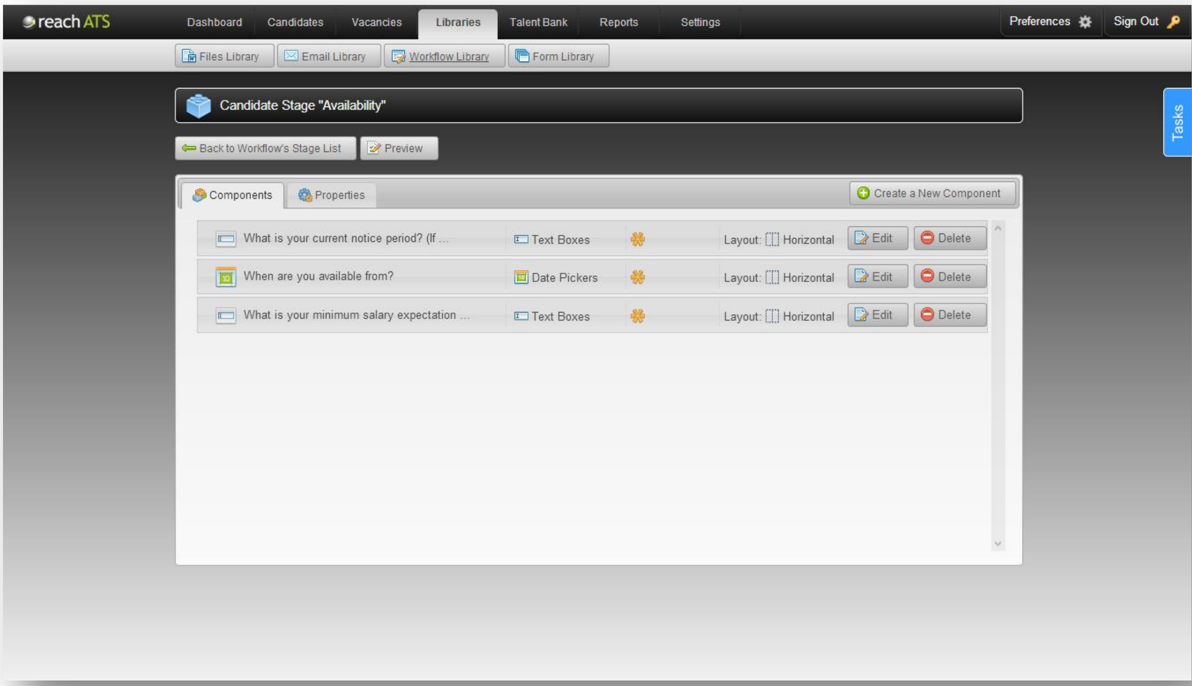
- To delete a stage, click **Delete** on the section row.

- To amend the questions for any stage, click **Edit** on the stage row.

This action shows all of the individual components contained within the form section including:

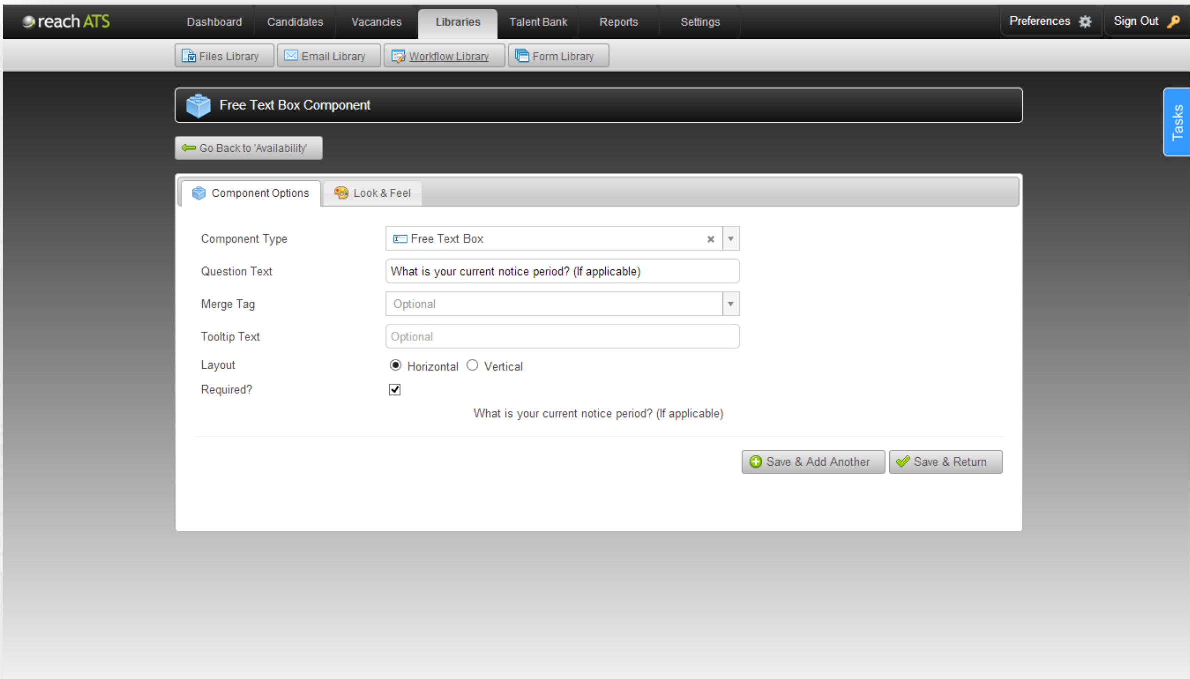
- The component text (*e.g. the question text 'What is your notice period?*)
- The component type (*e.g. free text box, dropdown, upload file etc.*)
- If the component is mandatory or not
- How the component will be displayed on screen (*adjacent to or underneath the question text*)

Figure 7: Editing a form section



Click **Edit** to amend the individual question.

Figure 8: Edit a question (or any component)



A comprehensive overview of component types is available in a separate user guide and in the Help Centre.

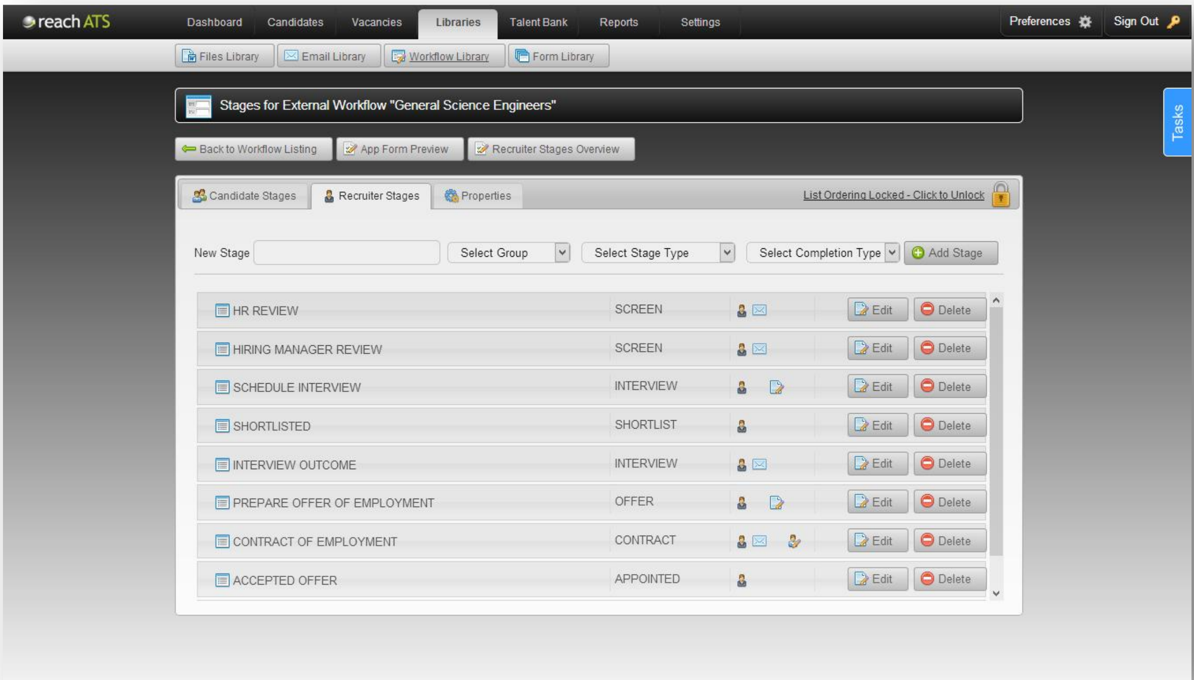
Change the details as necessary and then click **Save & Add Another** or **Save & Return**.

4. Recruiter Stages

To review the recruiter stages for any workflow, click **Edit** in the options bar.

The candidate stages tab shown initially, so click the **Recruiter Stages** tab.

Figure 9: Workflow recruiter stages



Each stage is a separate step within the recruitment process that candidates will progress through or be rejected from.

By default, the stages will be locked to prevent recruitment stages being moved unintentionally. To turn on drag & dropping of the stages, click **List Ordering Locked - Click to Unlock** (and click the link again to lock).

To add a new stage:

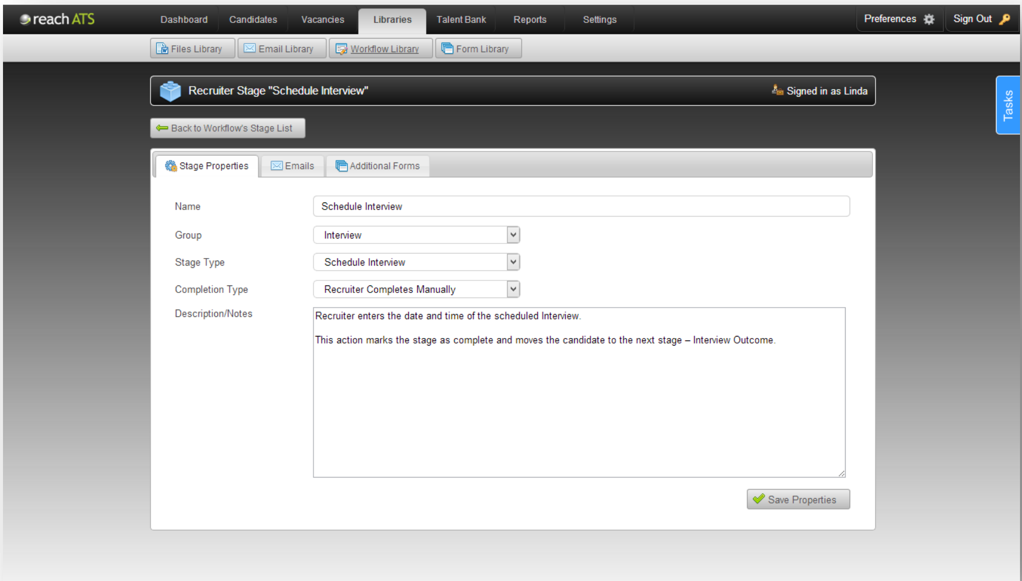
- Type the stage name into the new stage box
- Choose a group (*i.e. the tab in the candidate listing for this stage*)
- Set a stage type (*e.g. Screening, Schedule Interview etc.*)
- Set the completion type (*i.e. recruiter completes stage or system completes stage*)
- Click **Add Stage**

The new stage will appear at the bottom of the list. Drag and drop the new stage to the position required within the process.

To delete a stage, click **Delete** on the section row.

To amend the process for any stage, click **Edit** on the stage row.

Figure 10: Edit the Stage Properties of a recruiter stage



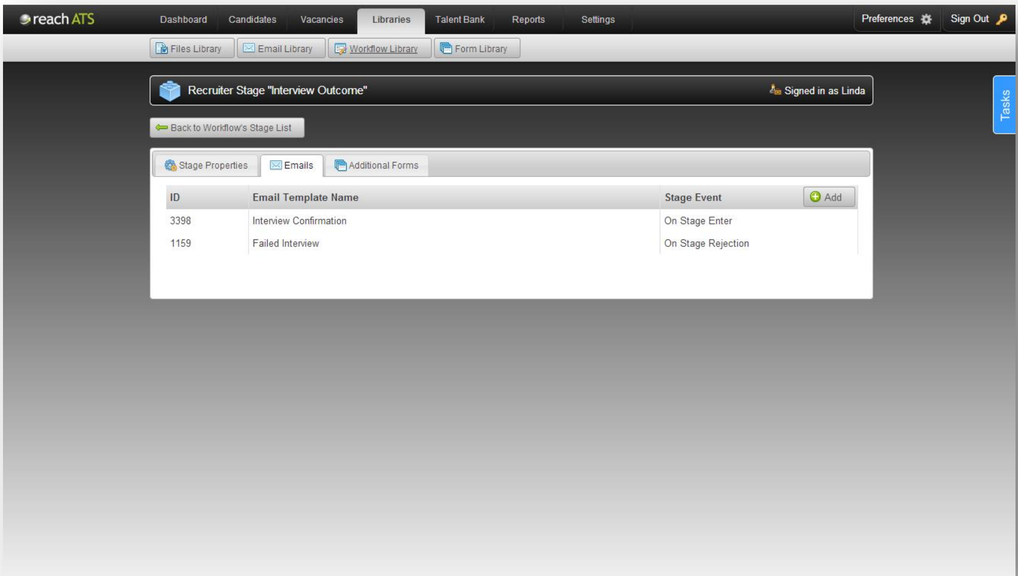
The Stage Properties tab allows you to edit the stage name as well as the group, stage type and completion type.

The **Description / Notes** field is very important since it is shown in two key places:

1. In the *workflow summary* and *workflow overview* screens to explain the purpose of the stage within the recruitment process
2. In the *candidate record card* to explain to the recruiter the actions that need to take place at the candidate's current stage

Amend any details as required and then click **Save Properties**.

Figure 10: Edit the emails that are sent at a recruiter stage

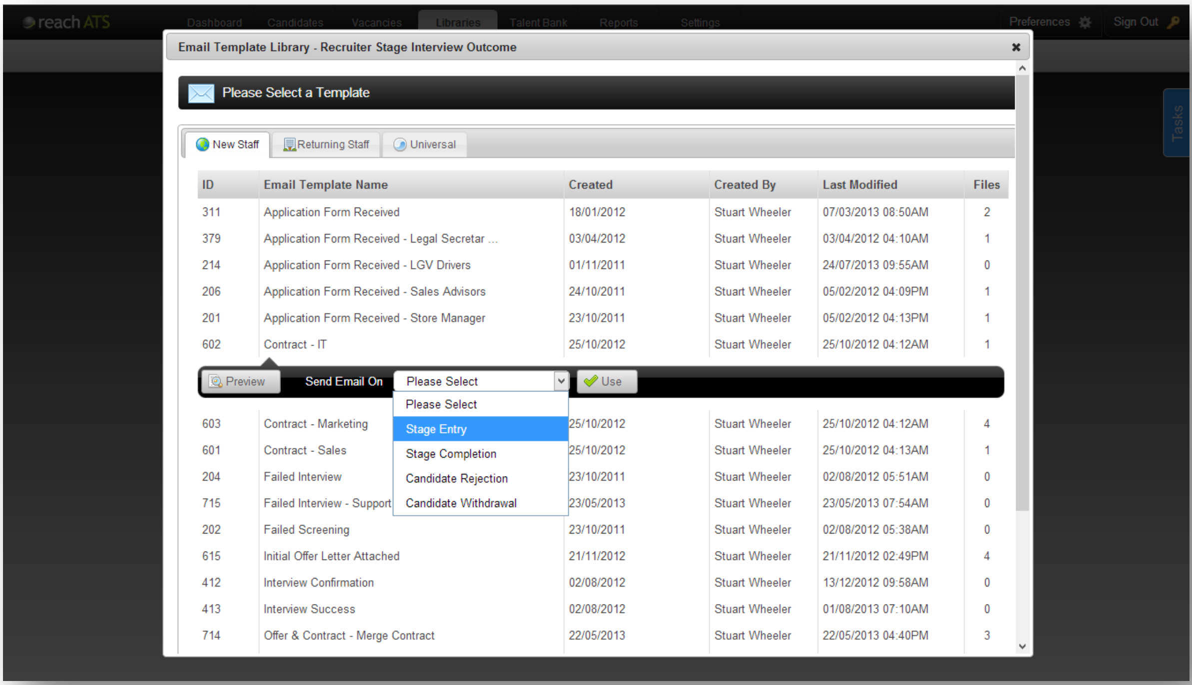


The system can automatically send email templates when a candidate:

- Enters a stage
- Is rejected from a stage
- Withdraws their application at a stage
- Completes a stage

To trigger an automated email at a recruiter stage, edit the stage then click the **Emails** tab then **Add**.

Figure 11: Add an automated email to a recruiter stage



The list of emails contained within the Email Library will be presented for selection.

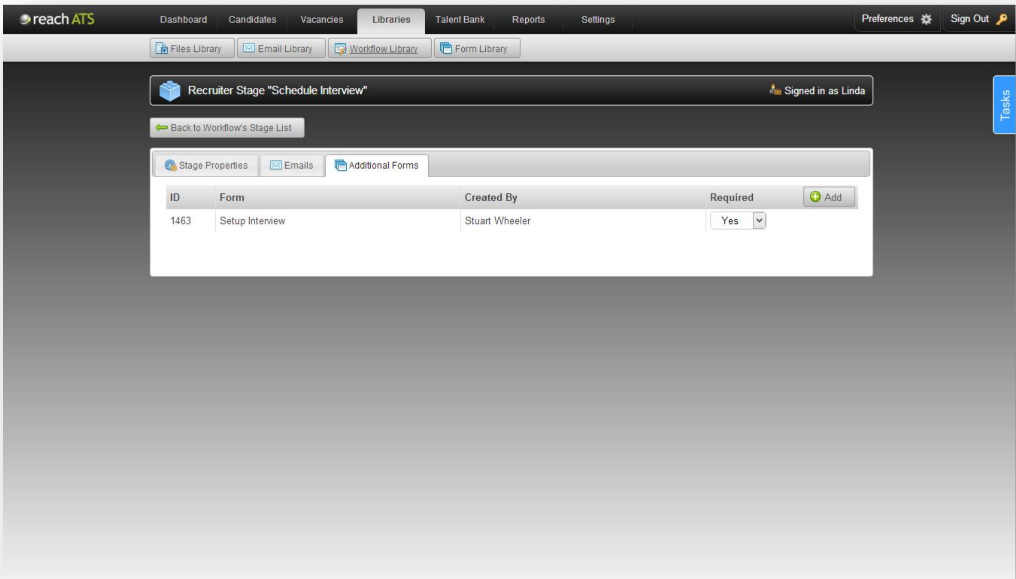
Click the email template that you want to send automatically and then set when the email should be sent:

- Stage Entry
- Stage Completion
- Candidate Rejection
- Candidate Withdrawal

Click **Use** to set the email for automatic sending.

The Additional Forms tab shows the additional forms that can be filled in at the stage.

Figure 12: Additional Forms tab

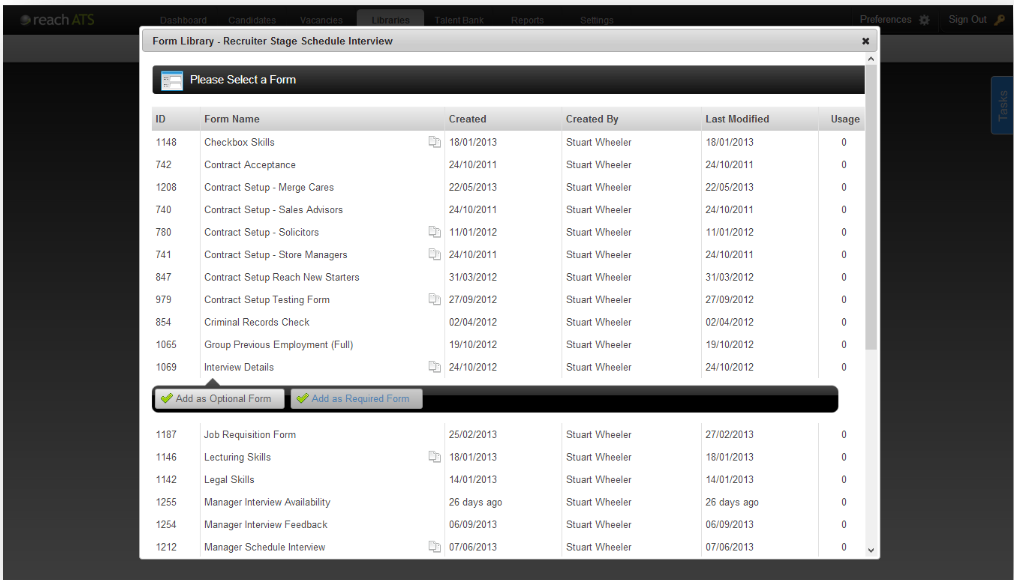


Additional forms can be completed by:

- The candidate
- The hiring manager
- The HR recruiter
- The candidate's referees

To set an additional form for completion at a recruiter stage, edit the stage then click the **Additional Forms** tab then **Add**.

Figure 11: Add an additional form to a recruiter stage



Select either **Add as Optional Form** or **Add as Required Form** to set the form for completion at this stage.

5. Creating and Copying Workflows

To create a new workflow, open the Workflow Library and click **Create a New Workflow**.

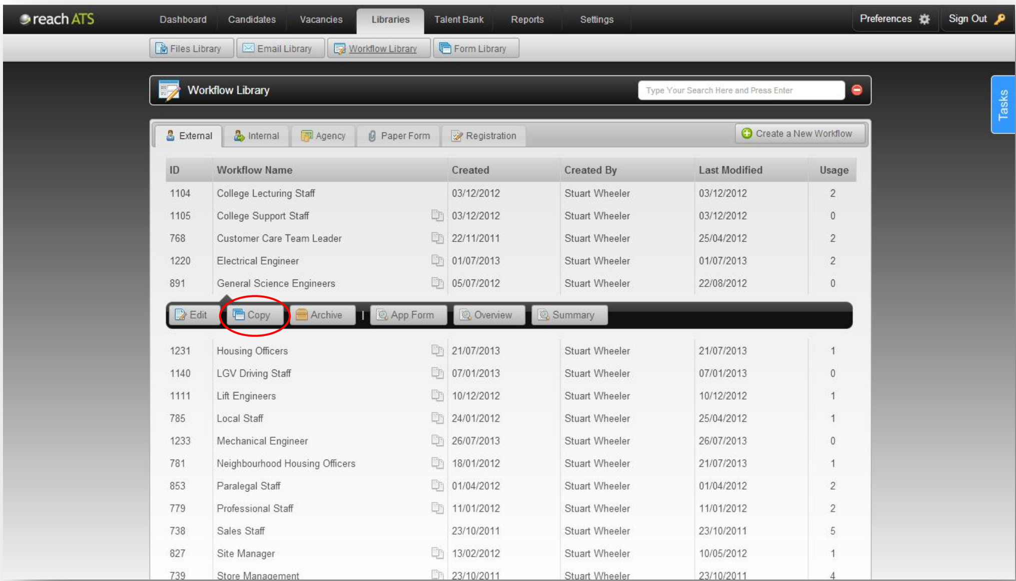
Although you can create new workflows at any time, we recommend that you always copy an existing workflow and amend it as necessary.

Copying an existing workflow instead of creating a workflow offers the following benefits:

- Saves lots of time – no need to add each stage, forms and activities from scratch
- Ensures consistency
- Allows you to modify any aspect of the flow as necessary

To copy a workflow, click the workflow and select Copy in the options bar.

Figure 12: ***Copy an existing workflow***



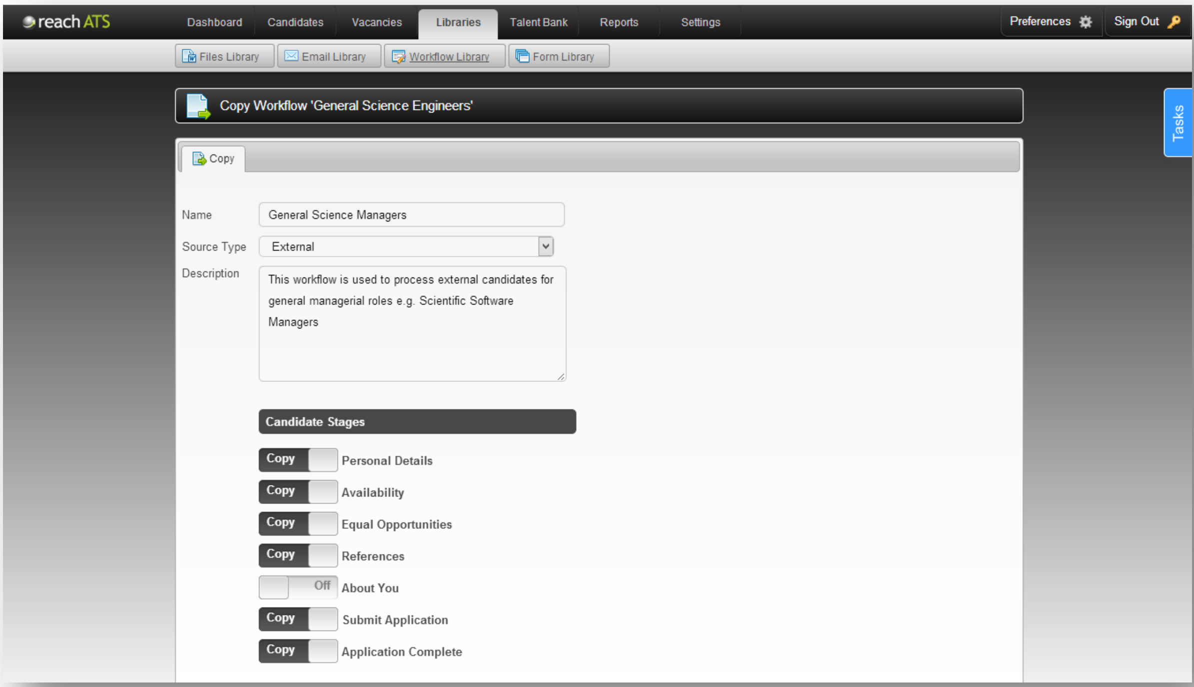
Name the new workflow and select a type (e.g. External, Internal etc.).

By default all candidate and recruiter stages will be copied but you can switch the stage off if required.

Click Copy & Return to add the new workflow to the listing.

Click Copy Workflow & Edit Stages to create the new flow and amend the candidate or recruiter stages.

Figure 13: Name the flow and select stages



6. Archive a Workflow

If a workflow is no longer required, it can be archived. This means that it will no longer appear in the workflow library.

To archive a workflow:

1. Click the workflow
2. In the options bar, click **Archive**

The workflow will be removed from the listing immediately.