

Quick Start Guide

Copy an Existing Workflow

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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. Why Copy Workflows?

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:

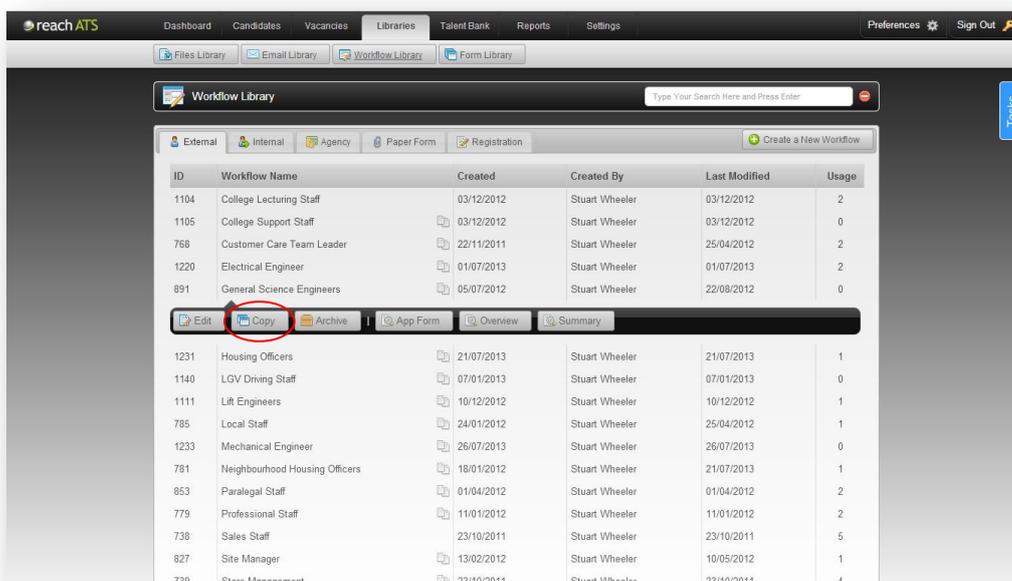
- Saves lots of time - no need to add each stage, forms and activities from scratch
- Ensures consistency
- Allows you to modify any aspect of the flow as necessary

3. Copy a Workflow

To copy a workflow:

1. Click the **Libraries** tab
2. Click **Workflows**
3. Choose the relevant **Tab** (e.g. External, Agency etc.)
4. Click the name of the workflow then **Copy**

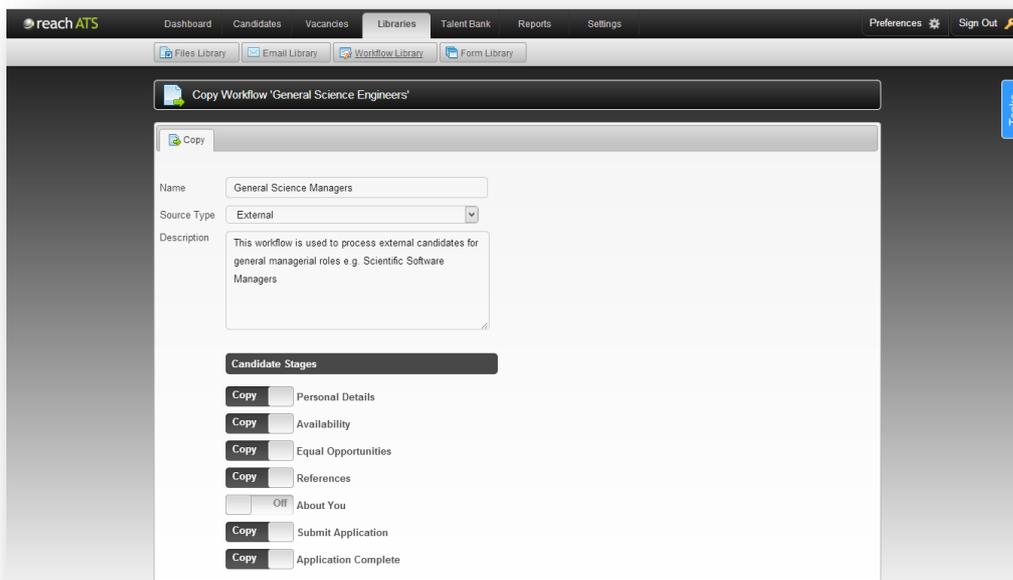
Figure 1: Copy an existing workflow



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 (see figure 2).

Figure 2: Name the flow and select stages

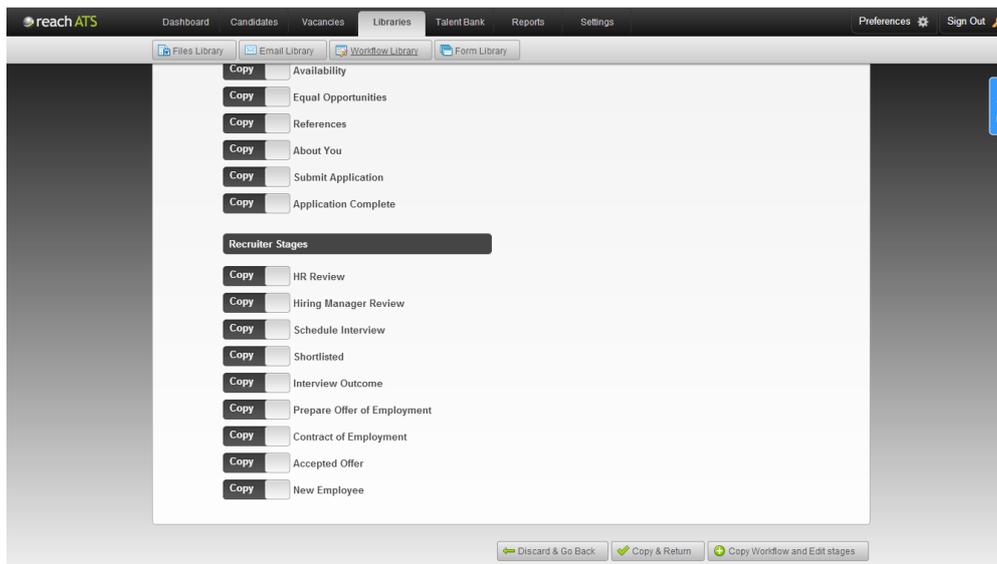


Click **Copy & Return** to add the new workflow to the listing.

OR

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

Figure 3: Copy & Return or Copy Workflow & Edit Stages



When the form has been copied it will appear in the Workflow Library and is available for immediate use on any vacancy.