

Quick Start Guide

Copy an Existing Workflow

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Strictly Commercial in Confidence





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

each ATS	Dashboard	Candidates Vacancies Li	oraries Ta	lent Bank Repo	rts Settings		Preferer	ices 🛱 🛛 Sign Out 🌙
_	Files Libr	ary 🖾 Email Library 🗔 Workflo	w Library	Form Library			_	_
	Worl	kflow Library			Тур	e Your Search Here and Press Ente		
	S Externa	I 🎄 Internal 🐻 Agency 🕖	Paper Form	Registration	_	Create a	New Workflow	
	ID	Workflow Name		Created	Created By	Last Modified	Usage	
	1104	College Lecturing Staff		03/12/2012	Stuart Wheeler	03/12/2012	2	
	1105	College Support Staff	Đ	03/12/2012	Stuart Wheeler	03/12/2012	0	
	768	Customer Care Team Leader	Q)	22/11/2011	Stuart Wheeler	25/04/2012	2	
	1220	Electrical Engineer	C)	01/07/2013	Stuart Wheeler	01/07/2013	2	
	891	General Science Engineers	C)	05/07/2012	Stuart Wheeler	22/08/2012	0	
	Edit	Copy 🚔 Archive 👔 🗓	App Form	Q Overview	Summary			
	1231	Housing Officers	Ęŋ.	21/07/2013	Stuart Wheeler	21/07/2013	1	
	1140	LGV Driving Staff	Q1	07/01/2013	Stuart Wheeler	07/01/2013	0	
	1111	Lift Engineers	C)	10/12/2012	Stuart Wheeler	10/12/2012	1	
	785	Local Staff	C1	24/01/2012	Stuart Wheeler	25/04/2012	1	
	1233	Mechanical Engineer	Ęŋ.	26/07/2013	Stuart Wheeler	26/07/2013	0	
	781	Neighbourhood Housing Officers	C)	18/01/2012	Stuart Wheeler	21/07/2013	1	
	853	Paralegal Staff	Ch.	01/04/2012	Stuart Wheeler	01/04/2012	2	
	779	Professional Staff	Co	11/01/2012	Stuart Wheeler	11/01/2012	2	
	738	Sales Staff		23/10/2011	Stuart Wheeler	23/10/2011	5	
	827	Site Manager	D)	13/02/2012	Stuart Wheeler	10/05/2012	1	
	739	Store Management	En	23/10/2011	Stuart Wheeler	23/10/2011	4	

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

reach ATS	Dashboard Candidates Vacancies Libraries Talent Bank Reports Settings	Preferences 🕸 Sign Out 🔑
_	🕞 Files Library 🗵 Email Library 🔯 <u>Workflow Library</u> 🕞 Form Library	
	Copy Workflow 'General Science Engineers'	
	Copy	
	Name General Science Managers	
	Source Type External	
	Description This workflow is used to process external candidates for general managerial roles e.g. Scientific Software Managers	
	Candidate Stages	
	Copy Personal Details	
	Copy Availability	
	Copy Equal Opportunities	
	Copy References	
	Off About You	
	Copy Submit Application	
	Copy Application Complete	

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.

reach ATS	Dashboard	Candidates	Vacancies	Libraries	Talent Bank	Reports	Setting	3		Preferences 🕻	f Sign Out 🔑
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		Сору	Equal Opport	unities							asks
		Сору	References								Ľ
		Сору	About You								
		Сору	Submit Applic	ation							
		Сору	Application C	omplete							
		Pecruiter St	2006							_	
		Recruiter 30	1969							_	
		Сору	HR Review								
		Сору	Hiring Manag	er Review							
		Сору	Schedule Inte	rview							
		Сору	Shortlisted								
		Сору	Interview Out	come							
		Сору	Prepare Offer	of Employme	nt						
		Сору	Contract of Er	nployment							
		Сору	Accepted Offe	er							
		Сору	New Employe	e							
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						UISCARD & G	O Back	Copy & Return	Copy workflow and Edit	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.