

Setting up Match/Interview Workflow



The workflow check boxes can control the process having Matched candidates to a Vacancy all the way through to Placing a candidate. Each workflow event creates a journal with a specified call type and method, and can set the status of the Match/Interview record appropriately

The default setup is :-

Workflow	Contact	Method	Call Type	New Status
Qualify Candidate	Candidate	Phone	QCD (Qualify Candidate)	QUAL
Contacted	Candidate	Email	NV (New Vacancy)	CONT
Spec Sent	Candidate	Email	SJS (Send Job Spec)	JSS*
CV Sent	Client	Email	SCV (Send CV)	CVS**
CV Follow up	Client	File Note	CVF (CV Follow up)	CVF
1 st Interview	Client	Phone	AIW (Arrange Interview)	1st
2 nd Interview	Client	Phone	AIW (Arrange Interview)	2nd
3 rd Interview	Client	Phone	AIW (Arrange Interview)	3rd
Offer	Candidate	Email	OFF (Offer job to Candidate)	OFF
Place	Candidate	Email	PLA (Place Candidate)	PLA

* JSS – This code ensures that the job spec is automatically attached (if it exists)

** CVS – This code ensures that the Safe CV is automatically attached (if it exists)

NB

If you have already started to use the workflow, then it is not a good idea to **insert** new items to it, as the Match/Interview records record a tick in the relevant position of the workflow event. New workflow events may be added to the end of the list though. There is a maximum of 13 workflow events.

Before you start, ensure that you have set up the relevant Journal Call Types, Journal Contact Types (Methods) and Match Status codes.

Journal Types may be edited by logging on as ADM and then selecting Database Maintenance, Code Tables. Select System Area “P (Customer Relationships)” and then Code Table “Call Types (019)”.

Journal Contact Types are also in System Area “P (Customer Relationships)”, Code Table “Jnl Contact Types (140)”.

Match Status is in System Area “C (Contact Management)”, Code Table “Match Status (905)”.

The workflow itself is set up via Parameters, which is accessible through Database Maintenance/Parameters. Use File/Open, and select the parameter set “INTWORKFLW” – Interview Workflow Check Boxes (either double click the mouse on the relevant line, or select it and then press OK). Now select the Text Tab, which should show a screen like the one below.

Setting up Match/Interview Workflow



Influence | Parameters

File Data Help

Selection

Set Name: Interview Workflow Check Boxes ID: INTWORKFLW S

Domain: SYS

Domain Value: * All accounts companies

Flags Integer Text

No.	Description	Value	Default	Validation
1	Check Box 1	Qualify Cand [CAN/P/QCD/QUAL]	Qualify Cand [CAN/P/QCD/QUAL]	
2	Check Box 2	Contacted [CAN/E/NV/CONT]	Contacted [CAN/E/NV/CONT]	
3	Check Box 3	Spec Sent [CAN/E/SJS/JSS]	Spec Sent [CAN/E/SJS/JSS]	
4	Check Box 4	CV Sent [CON/E/SCV/CVS]	CV Sent [CON/E/SCV/CVS]	
5	Check Box 5	CV Follow up [CON/T/CVF/CVF]	CV Follow up [CON/T/CVF/CVF]	
6	Check Box 6	1st Interview [CON/P/AIW/1st]	1st Interview [CON/P/AIW/1st]	
7	Check Box 7	2nd Interview [CON/P/AIW/2nd]	2nd Interview [CON/P/AIW/2nd]	
8	Check Box 8	3rd Interview [CON/P/AIW/3rd]	3rd Interview [CON/P/AIW/3rd]	
9	Check Box 9	Offer [CAN/E/OFF/OFF]	Offer [CAN/E/OFF/OFF]	
10	Check Box 10	Place [CAN/E/PLA/PLA]	Place [CAN/E/PLA/PLA]	
11	Check Box 11			
12	Check Box 12			
13	Check Box 13			
14	Check Box 14			
15	Check Box 15			
16	Check Box 16			
17	Check Box 17			

Find Delete Default OK Apply Cancel Help

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The “Value” column defines the workflow events. The description is first, and is followed by the workflow instructions in square parentheses “[” and “]”. There are four parts to the instructions, separated by a “/”.

- 1) Candidate or Client Contact – Set to CAN or CON
- 2) Method (or Journal Contact Type) – from the Jnl Contact Types Codes
- 3) Journal Call Type
- 4) New Match Status

So for example, looking at line 7 above, we have the description “2nd Interview”, the Journal is for the Client Contact (“CON”), it is a Phone Call (“P”), the Call type is Arrange Interview (“AIW”), and the status of the Match/Interview record will be changed to 2nd Interview (“2nd”).

On the “Flags” tab, you can set up the system to automatically generate a task for following up on the workflow event. The task may be set up to create automatically in the background with no intervention, or it can bring up a task window for the user to edit.

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Influence | Parameters

File Data Help

Selection

Set Name: Interview Workflow Check Boxes ID: INTWORKFLW S

Domain: SYS

Domain Value: * All accounts companies

Flags Integer Text

No.	Description	V	Validation	D
1	Auto task on CB1 'E'dit, 'A'utomatic, 'N'o	N	EAN	N
2	Auto task on CB2 'E'dit, 'A'utomatic, 'N'o	N	EAN	N
3	Auto task on CB3 'E'dit, 'A'utomatic, 'N'o	N	EAN	N
4	Auto task on CB4 'E'dit, 'A'utomatic, 'N'o	A	EAN	N
5	Auto task on CB5 'E'dit, 'A'utomatic, 'N'o	N	EAN	N
6	Auto task on CB6 'E'dit, 'A'utomatic, 'N'o	N	EAN	N
7	Auto task on CB7 'E'dit, 'A'utomatic, 'N'o	N	EAN	N
8	Auto task on CB8 'E'dit, 'A'utomatic, 'N'o	N	EAN	N
9	Auto task on CB9 'E'dit, 'A'utomatic, 'N'o	N	EAN	N
10	Auto task on CB10 'E'dit, 'A'utomatic, 'N'o	N	EAN	N
11	Auto task on CB11 'E'dit, 'A'utomatic, 'N'o	N	EAN	N
12	Auto task on CB12 'E'dit, 'A'utomatic, 'N'o	N	EAN	N
13	Auto task on CB13 'E'dit, 'A'utomatic, 'N'o	N	EAN	N
14	Auto task on CB14 'E'dit, 'A'utomatic, 'N'o	N	EAN	N
15	Auto task on CB15 'E'dit, 'A'utomatic, 'N'o	N	EAN	N
16	Auto task on CB16 'E'dit, 'A'utomatic, 'N'o	N	EAN	N
17	Auto task on CB17 'E'dit, 'A'utomatic, 'N'o	N	EAN	N

Find Delete Default OK Apply Cancel Help

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In the example above, Workflow Event number 4 (CV Sent in our example) is set to automatically create a task.

The number of days in the future for that task to be done may be specified on the “Integer Tab”. In the example below, the task will be created for the next day.

(You may also notice that there are 2 other parameters on the “Integer” tab. These define which documents are sent in sending a CV and sending out a job specification. The first one is which Candidate Document is sent – here Safe CV is the 2nd document in the candidate document list. The second is the Job Spec, which is the 1st document on a vacancy.)

Setting up Match/Interview Workflow



The screenshot shows the 'Influence | Parameters' window. The 'Selection' section has the following fields:

- Set Name: Interview Workflow Check Boxes
- ID: INTWORKFLW S
- Domain: SYS
- Domain Value: * All accounts companies

The 'Flags' section is currently set to 'Integer' and contains a table with 15 rows of flags:

No.	Description	Value	Default	Image
1	Document Index for auto send (SCV)	2	2	##
2	Document Index for auto send (SJS)	1	1	##
21	Days in future for CB1 task	0	0	##
22	Days in future for CB2 task	0	0	##
23	Days in future for CB3 task	0	0	##
24	Days in future for CB4 task	1	0	##
25	Days in future for CB5 task	0	0	##
26	Days in future for CB6 task	0	0	##
27	Days in future for CB7 task	0	0	##
28	Days in future for CB8 task	0	0	##
29	Days in future for CB9 task	0	0	##
30	Days in future for CB10 task	0	0	##
31	Days in future for CB11 task	0	0	##
32	Days in future for CB12 task	0	0	##
33	Days in future for CB13 task	0	0	##
34	Days in future for CB14 task	0	0	##
35	Days in future for CB15 task	0	0	##

Buttons at the bottom include Find, Delete, Default, OK, Apply, Cancel, and Help. The status bar shows ADM, T=0019 P=0243, Influence Software Limited, and 07/02/2006.

Once the workflow has been set up, you can press the “Apply” button – Do not press OK as this will take you out of the parameters program, and you still need open up another set of parameters – “INTWRKSHRT” - Interview Workflow Check Boxes Short. Use File/Open, and select this parameter set.

The “Interview Workflow Check Boxes Short” parameter set is used to put titles on the Candidates list on the Vacancy, as the full names would be too long to fit.

Once this is complete, you can press OK, and you have finished setting up your workflow.

Setting up Match/Interview Workflow



Influence | Parameters

File Data Help

Selection

Set Name: ID: S

Domain:

Domain Value: *

Text

No.	Description	Value	Default	Validation
1	Check Box 1 Short Name	QC'd	QC'd	
2	Check Box 2 Short Name	Cont'd	Cont'd	
3	Check Box 3 Short Name	SpcSnt	SpcSnt	
4	Check Box 4 Short Name	CVSnt	CVSnt	
5	Check Box 5 Short Name	Flw'up	Flw'up	
6	Check Box 6 Short Name	1st	1st	
7	Check Box 7 Short Name	2nd	2nd	
8	Check Box 8 Short Name	3rd	3rd	
9	Check Box 9 Short Name	Off'd	Off'd	
10	Check Box 10 Short Name	Plc'd	Plc'd	
11	Check Box 11 Short Name			
12	Check Box 12 Short Name			
13	Check Box 13 Short Name			
14	Check Box 14 Short Name			
15	Check Box 15 Short Name			
16	Check Box 16 Short Name			
17	Check Box 17 Short Name			

Find Delete Default OK Apply Cancel Help

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