

Lock Workflow Process Quick Steps

1

Access the Features Screen and Select a Group

2

Select the Lock Workflow Process Feature

3

Open or Create the Recruiting Workflow to Lock

4

Check **Enforce Workflow** to Lock the Candidate Processes

5

Create a Requisition Associated with the Locked Workflow from Step 4

6

View the Limited Requisition Statuses Available for Selection by a Recruiter

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Refresh icon, Filter icon

The high-level steps required to enable the Lock Workflow Process feature to limit the statuses recruiters can move candidates through to only those configured in your workflow at the time of requisition creation are shown in the menu on the left.

Navigation

- Click the numbered circles on the left to move to the first step in each phase.
- Use the **Page Down** key to proceed through the quick steps. Use the **Page Up** key to return to a prior slide.

Begin

Kathryn Admin	12 Apr 2018	12 May 2018	+
Re ne Admin	18 Apr 2018	None	+
Epe to Admin	None	None	+

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Click the Administration icon.

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Search...



Main Dashboard

Get More Widgets

Alerts

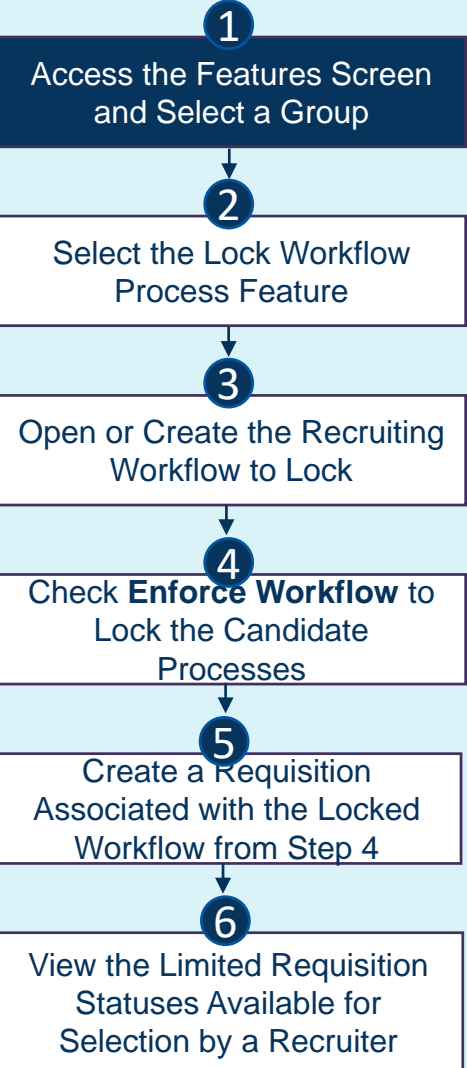
- New Tuition Assistance Requests (13)
- Score this Appraisal - Appraisal (Project Metrics Test) Reine Admin

Show All

Continuous Feedback

EMPLOYEE	MOST RECENT MEETING	NEXT MEETING	ACTION
Kathryn Admin	12 Apr 2018	12 May 2018	+
Reine Admin	18 Apr 2018	None	+
Eepito Administrator	None	None	+

Lock Workflow Process Quick Steps



ADMINISTRATION

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Application Restriction Rules
Diversity Data Collection
Dynamic Forms
External Front Ends
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Workflows

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Pay Installments
Manage Referral Awards
Approve Award Plans
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Résumé Deletions

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Potential Rating Tips

Succession Planning

Manage Succession Plans
Configure 9 Box

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System Administration

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Your Organization

Approval Chains
Competencies
Documents
Skills
Users
View Off-Boarded Users

1a

Scroll to the Global Settings, System Administration area and click **Features**.

https://docenhancement.awsqa.hua.hrsmart.com/hr/hua/PageOptions/index

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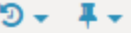
SUCCESSION ▾

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Search...



Administration / Global Settings / System Administration / Features



Features

Groups

SELECT A GROUP *

-- Select --



1b

Click the **Select a Group** drop-down arrow to view a list of groups.

Application Development Testing Company
v15.1-rc.11

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Administration / Global Settings / System Administration / Features



Features

Groups

SELECT A GROUP *

-- Select --

-- Select --

Implementation

Administrator

Employee

Manager

Custom Group

HR Business Partner

CL Administrator

JJ - Squad

Reporting

Configurator

Recruiter

Hiring Manager

External Job Seekers

1c

Click **Configurator**.

Application Development Testing Company
v15.1-rc.11

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☰

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🔄 ▾

📌 ▾

Administration / Global Settings / System Administration / Features

Features

Groups

SELECT A GROUP *

Configurator ▾

☒ Core 🌐

☒ Recruiting

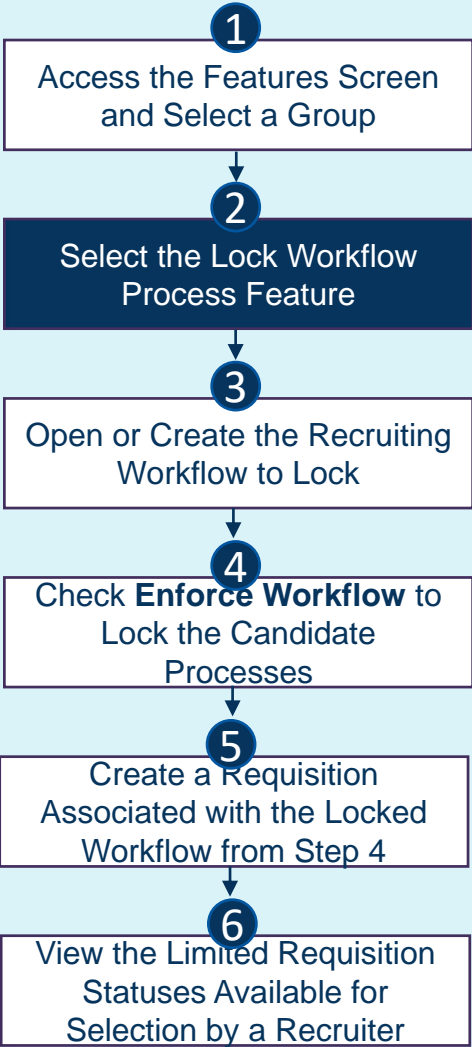
☒ Performance

☒ Development

2

Click **Recruiting**.

Lock Workflow Process Quick Steps



☐ **Personalize Recruiting Settings**
This feature allows the user to configure certain screens within the system. These settings apply to only the Applicant Tracking System (ATS).

☐ **Provide and View Feedback**
If enabled, the user will be able to enter feedback and view the feedback provided by others.

☐ **Radius Search** ⓘ
This feature controls the visibility of the radius search system setting and the fields displayed on the résumé and job search forms. To hide the radius search options, disable this feature.

☐ **Recruiting Workflow** ⓘ

2a Select **Recruiting Workflow**.

This feature group contains features relating to

☒ **Referral** ⓘ
This controls the Employee Referral System. To disable the feature set entirely, disable this option.

☐ **Referral Source Details (PE Only)** ⓘ
Enable Referral Source Details field in all forms where a referral source is selectable. (PE Only)

☒ **Requisition** ⓘ
This collection of features contains all of the functionality necessary for creating, working, and managing requisitions.

☒ **Requisition Transaction Log** ⓘ
This feature allows members of the group to view the requisition's "Notes & Transaction Log".

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☐ Personalize Recruiting Settings

This feature allows the user to configure certain screens within the system. These settings apply to only the Applicant Tracking System (ATS).

☐ Provide and View Feedback

If enabled, the user will be able to enter feedback and view the feedback provided by others.

☐ Radius Search 🌐

This feature controls the visibility of the radius search system setting and the fields displayed on the résumé and job search forms. To hide the radius search options, disable this feature.

☒ Recruiting Workflow 📄

Enable All

Disable All

This feature group contains features relating to Recruiting workflows.

☐ Create Job Seeker Workflow

This feature allows administrators to configure the passive job seeker workflows in the system.

☐ Lock Workflow Process 🌐

This feature locks the candidate's allowed status transitions at the time the associated requisition was created.

☐ Recruiting Workflow Management

This feature allows users to create, edit and manage existing Workflows.

☒ Referral 📄

2b

Select **Lock Workflow Process**.

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View the Limited Requisition Statuses Available for Selection by a Recruiter

This is the global vendor feature, which turns on/off the Vendor Management System entirely.

☒ Performance

☒ Development

☒ Learning

☐ SVM

☐ Demo Site 🌐

☐ Debug Mode 🌐

☐ Customer Specific Features (Enterprise)

2c

Select the **Update Features** button.

✓ Update Features

⌂ Cancel

Reset

Access the Features Screen and Select a Group

Select the Lock Workflow Process Feature

Open or Create the Recruiting Workflow to Lock

Check **Enforce Workflow** to
Lock the Candidate
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Create a Requisition
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[View the Limited Requisition
Statuses Available for
Selection by a Recruiter](#)

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Click the Administration icon.

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Search...

Administration / Global Settings / System Administration / Features

Features

Groups

SELECT A GROUP *

Configurator

☒ Core

☒ Recruiting

☒ Performance

☒ Development

SELECT A GROUP *

Configurator

☒ Core 

☒ Recruiting

- ☑ Performance

☒ Development

Click the
Administration icon.

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
≡


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Under Recruiting » Configuration, click **Workflows**.

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View the Limited Requisition Statuses Available for Selection by a Recruiter

NAME	ASSOCIATIONS	DATE CREATED	LAST MODIFIED	
R.A Supermarket	<ul style="list-style-type: none">Company/Division: SUPERMARKETJob Type: Full-timeLocation: RN - R.A Mega (MAIN)Job Title: RN - R.A SS Customer Care	14 Jan 2016	15 Jan 2016	⋮
CF - Transit Inc Workflow	<ul style="list-style-type: none">Company/Division: CarlosF Transport Inc	27 Jun 2016	17 Aug 2016	⋮
AB - Pharmacist Recruiting Workflow	<ul style="list-style-type: none">Company/Division: Pharmacists	1 Jul 2016	1 Jul 2016	⋮
PBA - DSL Workflow				⋮
AB - Nurse Recruiting Workflow		2 Sep 2016	6 Oct 2016	⋮
AB - Support Recruiting Workflow	<ul style="list-style-type: none">Company/Division: Support DivisionJob Type: Full-time	2 Sep 2016	20 Oct 2016	⋮
SZ-Temp Workflow	<ul style="list-style-type: none">Company/Division: SZ CompanyJob Type: ContractLocation: SZ-Location South	27 Feb 2017	16 Mar 2017	⋮

Note: You can also create a new workflow with **Enforce Workflow** selected. To do this, click the **Create New Workflow** button at the top of the screen.

3b

Click the workflow you want to lock.

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Administration / Recruiting / Configuration / Workflows



Workflows

Passive Résumé Workflows

Create New Workflow

More Options

View: PBA - DSL Workflow



Associations

ASSOCIATIONS

- Company/Division: PBA - DS Company
- Job Type: Full-time

3c

Click the Edit icon.

Roles

RECRUITER

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The Candidate Process step is where you define the statuses that each candidate will step through during the recruitment process. You will lock these processes when you are finished by clicking **Enforce Workflow**.

You can define a different set of statuses for each résumé type. We'll demonstrate defining statuses for the Internal résumé type.

Workflows

1

s

Step 5

Résumé Submission

Step 6

Candidate Process

Step 7

User Tasks

Step 8

Automated Actions

Step 9

Offers

Step 10

Onboarding

Candidate Process *†

At least one of the fields marked with a (*†) is required. Fields marked with only a (†) are optional, but may be required based on the selections in other fields.



Internal

3d

Click the **Internal** drop-down arrow.



External

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View the Limited Requisition Statuses Available for Selection by a Recruiter

REPORTS

Candidate Process *†


At least one of the fields marked with a (*) is required. Fields marked with only a (†) are optional, but may be required based on the selections in other fields.


☒ Internal 

[Custom] Offer Declined
[Custom] Offer Accepted
Background Screening
Selnium Declined
Résumé Submitted
Candidate
Selnium Hired
Hired

3e

Select a status from the list on the left. Then click the right arrow to select it. Repeat this step until you have all the statuses selected that you want to include in this process. You can move statuses up and down using the arrows to the right.

☒ ☐ External 

☒ ☐ Employee Referral 

☒ ☐ Vendor Submitted 

☒ ☐ Contact 

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View the Limited Requisition Statuses Available for Selection by a Recruiter

[Custom] Offer Declined
[Custom] Offer Accepted
Background Screening
Selenium Declined
Selenium Hired
Offer Accepted
Selenium Offer Extended
Offer Declined

Résumé Submitted
Phone Screen
Candidate
Interview
2nd Interview
Offer Extended
Hired

☒ ☐ External ✓

☒ ☐ Employee Referral ✓

☒ ☐ Vendor Submitted ✓

☒ ☐ Contact ✓

☒ ☐ Recruiter Uploaded ✓

4

Scroll down and select the **Enforce Workflow** check box.

☐ Enforce Workflow

Selected Résumé Types

Lock Workflow Process Quick Steps

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View the Limited Requisition Statuses Available for Selection by a Recruiter

At least one of the fields marked with a (*) is required. Fields marked with only a (†) are optional, but may be required based on the selections in other fields.

☒ Internal ✓

☒ External ✓

☒ Employee Referral ✓

☒ Vendor Submitted ✓

☒ Contact ✓

☒ Recruiter Uploaded ✓


☒ Enforce Workflow

If you receive an error when saving, ensure that for each of the résumé types, your candidate process statuses match the statuses selected in Step 8 of the workflow, Automatic Actions.

After you have saved the requisition, going forward, for requisitions created that are associated with this workflow, recruiters are limited to the statuses in the processes you defined for each of the résumé types.

< Prev

> Next

 Save

4a

Click **Save**.

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Administration / Recruiting / Configuration / Workflows / Workflow Wizard

Editing Workflow: Full-time Workflow

Workflows

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Résumé Submission

Step 6
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Step 8
Automated Actions


Step 9
Offers

Step 10
Onboarding

Candidate Process *†

At least one of the fields marked with a (*†) is required. Fields marked with only a (†) are optional, but may be required based on the selections in other fields.

☒ Internal 

☒ External 

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View the Limited Requisition Statuses Available for Selection by a Recruiter

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Administration / Recruiting / Configuration / Workflows / Workflow Wizard

Editing Workflow: Full-time Workflow

Workflows

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Candidate Process

Step 7
User Tasks

Step 8
Automated Actions

Step 9
Offers

Step 10
Onboarding

Resume Submission

Candidate Process *†

At least one of the fields marked with a (*†) is required. Fields marked with only a (†) are optional, but may be required based on the selections in other fields.

☒ Internal ✓

☒ External ✓

5a

Click **Requisitions**.

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Editing Workflow: Full-time Workflow

Workflows

Step 6 Candidate Process

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Step 8 Automated Actions

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Step 10 Onboarding

Candidate Process *†

At least one of the fields marked with a (*†) is required. Fields marked with only a (†) are optional, but may be required based on the selections in other fields.

☒ Internal

☒ External

...hrsmart.com/ats/admin/workflow_wizard.php

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Résumés

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Create a New Requisition from Job Profile Library

ORGANIZATIONAL UNIT

*

PBA - DS Company

DS - Information Technology

Select Workflow Association

JOB TYPE

Full-time

LOCATION

PBA Main Office - Philippines

JOB TITLE ⓘ *

Software Tester (PA.03)

+ Create a New Job Profile

MATCHING WORKFLOW

PBA - DSL Workflow

FOUND

Fill out the fields in Step 1 Select Associations. Be sure that the selections you make match the workflow locked in step 4 of this click-thru. If you use a template to create your requisition, be sure it is associated with the workflow from step 4.

5c

Click the **Continue** button when finished.

✓ Continue

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View the Limited Requisition Statuses Available for Selection by a Recruiter

➤ Preview in Español (SP)

➤ Preview in عربي

➤ Preview in Français (FR)

➤ Preview in Swedish

▼ Front End Requisition Posting Options

SELECTED FRONT ENDS

- Default Front End

Continue through the requisition creation steps. The steps you see are defined by the workflow. When finished with the last step, click the **Finish** button. If your requisition requires approvers after clicking **Finish**, all approvers must approve the requisition before it appears in Manage Requisitions.

◀ Previous

📄 Save as Draft

➤ Finish

Cancel

5d

Click **Finish**.

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Résumé Dashboard

Résumé Dashboard



Suzanne Spring (Internal)

Edit

Print

Download

Total Talent Profile

kenilshah+rafaelfang_suzzanespring@hrsmart.com

312

1920 Central Perk, #303
New York City, NY 21805

765-098-7865



Job Seekers (Viewing 1 of 50)

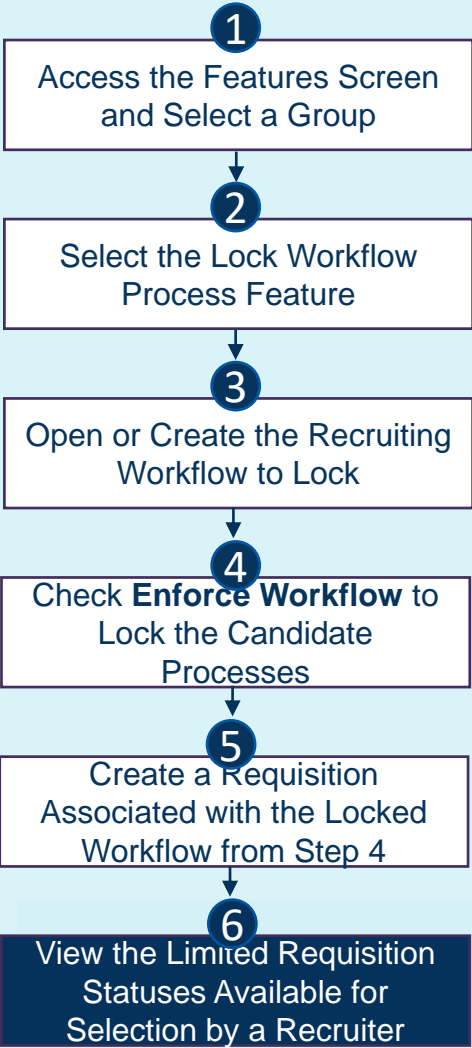
>> Anna Autumn

Access the Résumé Dashboard by clicking on an employee name from anywhere within DTM.

6

Click the down arrow to scroll to the Résumé Dashboard tabs.

Lock Workflow Process Quick Steps



SELECTED REQUISITION

No Requisitions Found

RÉSUMÉ PROFILE

ACTIONS

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Expand All Panels

6a

From the Résumé Dashboard Actions tab, click **Add to Requisition**.

> Add to Requisition

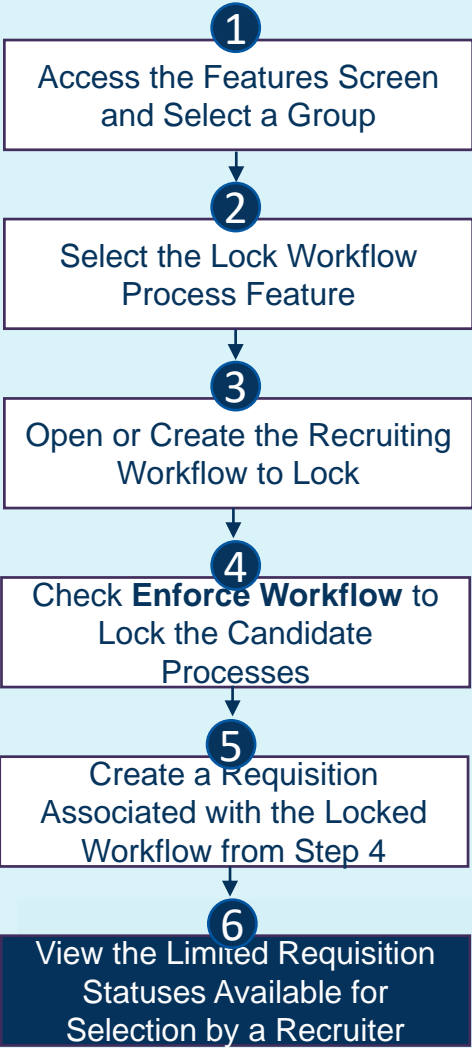
> Send a Letter

> Add to Pool

> Secondary Application

> Suggest Deletion

Lock Workflow Process Quick Steps



Expand All Panels

Add to Requisition

AVAILABLE REQUISITIONS *

Type Keyword Here

6b Click the **Available Requisitions** drop-down arrow to view a list of requisitions.

Add to Requisition

Reset

Send a Letter

Add to Pool

Secondary Application

Suggest Deletion

Employees cannot be suggested for deletion.

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View the Limited Requisition Statuses Available for Selection by a Recruiter

▼ Add to Requisition

AVAILABLE
REQUISITIONS *

Type Keyword Here

RJM - QA Specialist (401)

RJM - Test Data (429)

Senior Food Scientist (PCCN-SrChef)

▼ Software Tester (PA.03)

Software Tester (PA.03.1)

Test - Do not apply - Dex (PPLSC.1)

TP - Hourly Assoc Travel Guide (TP - HRL Assoc TG)

<<

<

4

>

>>

Displaying 31-37 of 37 results

6c

Select the requisition created in step 5 of this click-thru.

➤ Add to Pool

➤ Secondary Application

Lock Workflow Process Quick Steps

1

Access the Features Screen and Select a Group

2

Select the Lock Workflow Process Feature

3

Open or Create the Recruiting Workflow to Lock

4

Check **Enforce Workflow** to Lock the Candidate Processes

5

Create a Requisition Associated with the Locked Workflow from Step 4

6

View the Limited Requisition Statuses Available for Selection by a Recruiter

▼ Add to Requisition

AVAILABLE
REQUISITIONS *

Software Tester (PA.03)

✓ Add to Requisition

6d

Click **Add to Requisition**.

➤ Send a Letter

➤ Add to Pool

➤ Secondary Application

▼ Suggest Deletion

Employees cannot be suggested for deletion.

⊕ Expand All Panels

Lock Workflow Process Quick Steps

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View the Limited Requisition Statuses Available for Selection by a Recruiter

PERFORMANCE



LEARNING



SUCCESSION



CAREER CENTER



REPORTS



Résumé Dashboard



Suzanne Spring (Internal)

Edit

Print

Download

Total Talent Profile

✉ kenilshah+rafaelfang_suzzanespring@hrsmart.com

☎ 312

🏠 1920 Central Perk, #303
New York City, NY 21805

☎ 765-098-7865



Job Seekers (Viewing 1 of 50)

>> Anna Autumn

SELECTED REQUISITION

PA.03 - Software Tester

6e

Click the Workbench tab.

RÉSUMÉ PROFILE

ACTIONS

INFORMATION

TRANSACTION LOG

WORKBENCH

Lock Workflow Process Quick Steps

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View the Limited Requisition Statuses Available for Selection by a Recruiter

RÉSUMÉ PROFILE

ACTIONS

INFORMATION

TRANSACTION LOG

WORKBENCH

Expand All Panels

Status

CURRENT STATUS

Résumé Submitted << Candidate >> Interview

[View Candidates in the Same Requisition](#)

CHANGE STATUS

Move to next Status

6f

Click the **Change Status** drop-down arrow.

COMMENTS

Submit

Reset

Checklist

Lock Workflow Process Quick Steps

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View the Limited Requisition Statuses Available for Selection by a Recruiter

RÉSUMÉ PROFILE

ACTIONS

INFORMATION

TRANSACTION LOG

WORKBENCH

Expand All Panels

Status

CURRENT STATUS

Résumé Submitted << Candidate >> Interview

[View Candidates in the Same Requisition](#)

CHANGE STATUS

Move to next Status

Move to next Status

Move to previous Status

Résumé Submitted

Phone Screen

Candidate

Interview

2nd Interview

Offer Extended

Hired

Note the statuses shown here are those set in the recruiting workflow's Step 4 Candidate Process, before we selected the **Enforce Workflow** option.

Click the **Continue** button for additional information about options affected by enabling the Lock Workflow Process feature.

Continue

Checklist

Lock Workflow Process Quick Steps

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View the Limited Requisition Statuses Available for Selection by a Recruiter

Dashboard

MY EMPLOYEES

RECRUITING

PERFORMANCE

LEARNING

SUCCESSION

CAREER CENTER

REPORTS

Employees

Search...

Recruiting / Candidates / Search Candidates

Search Candidates Results

<< < 1 > >>

Displaying 1 - 2 of 2

10 25 50 100 per page

<input type="checkbox"/>	TYPE	FE	NAME	H	VIEWED	JOB TITLE	STATUS	REFERRAL SOURCE	CREATED
<input type="checkbox"/>	External		Viktor Krum						27 Mar 2014
<input type="checkbox"/>	Recruiter Uploaded		Alice Longbotto						27 Mar 2014

-- Select --

-- Select --

Send a Letter

Send a Printable Batch

Add to Pool

Route Résumés

Continue

With the Lock Workflow Process feature enabled and **Enforce Workflow** selected, certain bulk actions, such as **Mark as Candidate** and **Change Status**, are not available from various screens, like the Search Candidates Results screen, shown here, as well as the New Résumé Submissions, Active Candidates, Search Résumé Results, Historical View, and Add to Pools screens.

Lock Workflow Process Quick Steps

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Access the Features Screen and Select a Group

2

Select the Lock Workflow Process Feature

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4

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5

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6

View the Limited Requisition Statuses Available for Selection by a Recruiter

REPORTS

Automated Actions

DEFAULT PROCESS

-- Select --

Internal

WHEN

Job Seeker Screens Out

ACTION TO PERFORM

Select Action

Select Action

Send Letter

Change Status

Redirect to URL

Save

Copy Current Actions to Selected Types

There is no data to display.

External

Employee Referral

Vendor Submitted

Also on the Automated Actions step of a workflow with **Enforce Workflow** selected, the Change Status action is available only for the **Job Seeker Screens Out** or **Job Seeker Screens In** options.

This concludes the Lock Workflow Process Quick Steps.