

# Application Form Process

**CREATING A DEFAULT APPLICATION FORM  
FOR YOUR ORGANISATION**

## Introduction

Within your organisation on TalentLink, you are able to define a **Default Application Process** which determines as a standard, what online application form candidates will complete when applying for roles within your organisation.

This guide provides step-by-step instructions on how to define a process and covers the following;

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Throughout the guide, you will see the following icons which indicate the WMJobs Team's recommendations which will help you with all your [title] queries.



Top tips



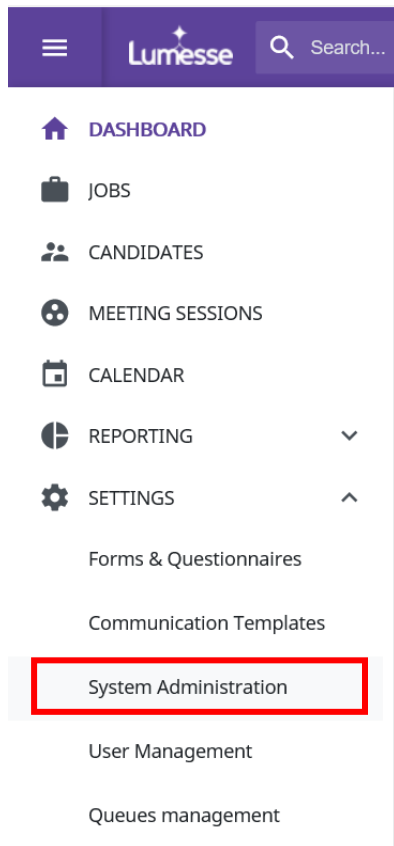
Important Information



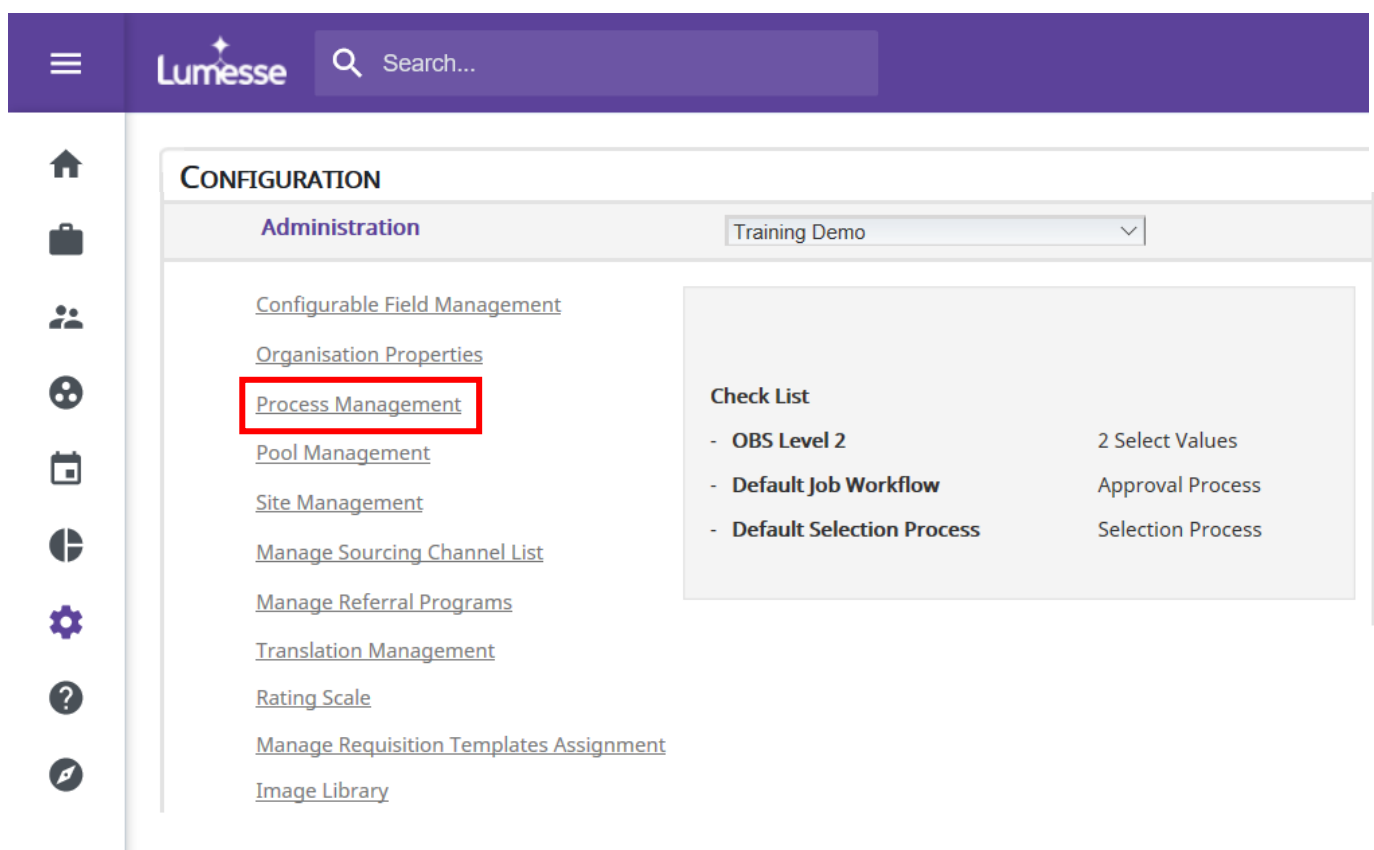
Best Practice

## 1. Defining a Default Application Process

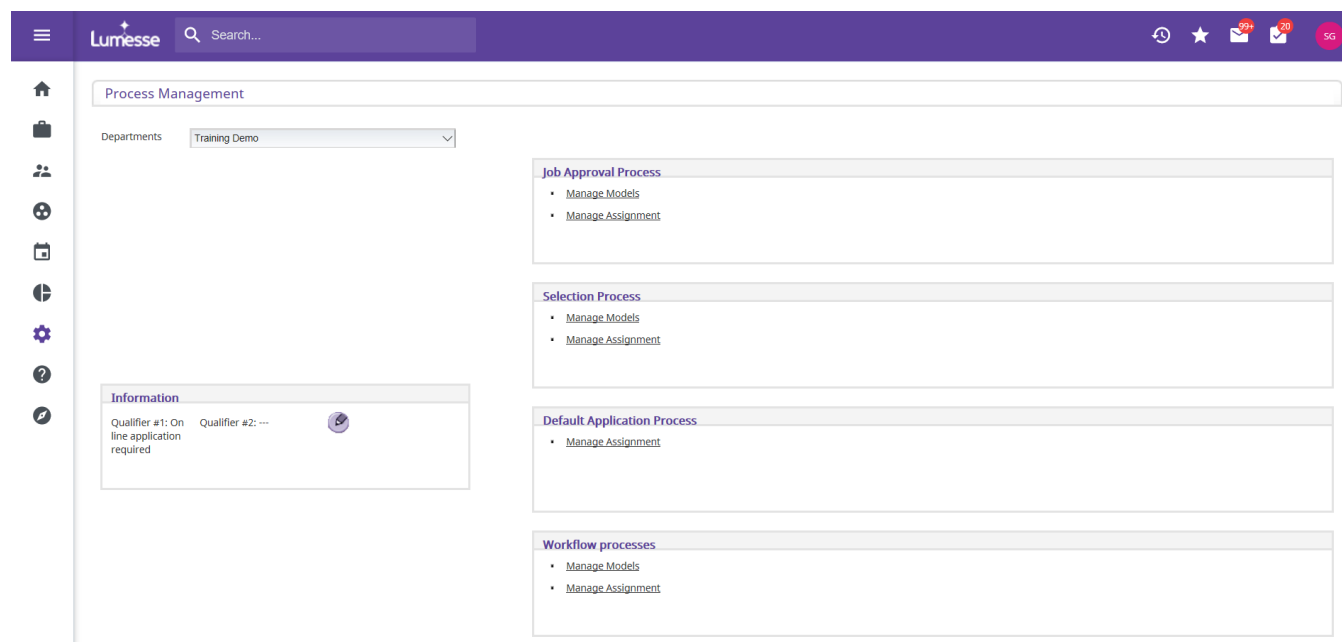
To navigate to 'Default Application Process', log-in to Talentlink, and from the left-hand menu, click the arrow next to '**Settings**' and select '**System Administration**';



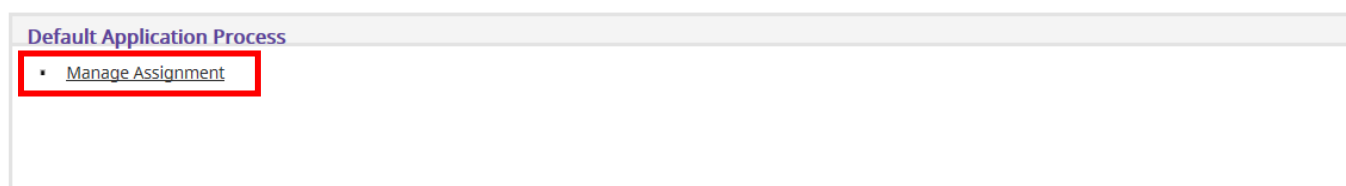
From the list under 'Administration', select, '**Process Management**';



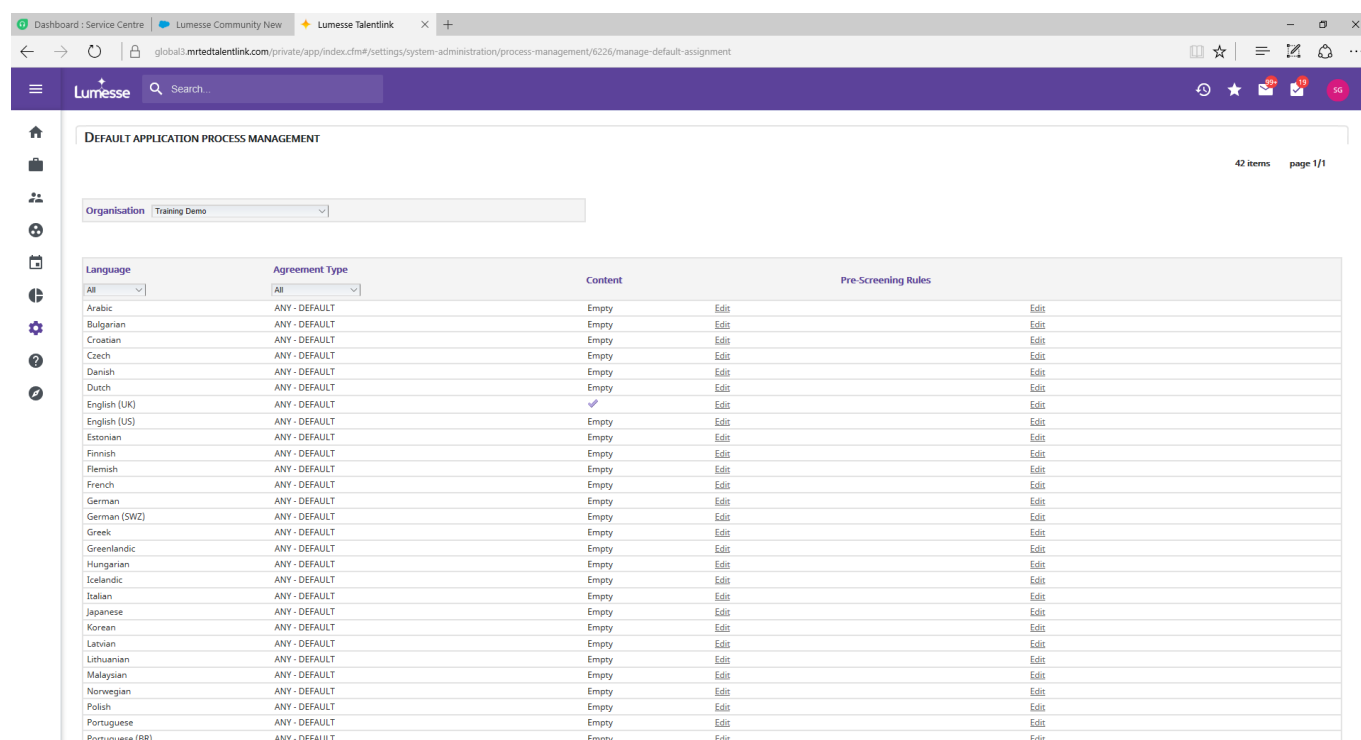
When you click onto 'Process Management', you will see you have access to all the processes which exist in your organisation – Job Approval, Selection, Workflow and **Default Application Process**;



To define a process, under '**Default Application Process**', click '**Manage Assignment**';



You will then be taken to the '**Default Application Process Management**' screen which will show you a list of the languages (which are those available in TalentLink);



At the top left of the screen, you will see the name of the organisation you are defining your application process for;

## DEFAULT APPLICATION PROCESS MANAGEMENT

Organisation Training Demo



If you have access to more than one organisation in TalentLink, **ensure you have selected the appropriate organisation**

From the list of languages, focus on the line which reads **'English (UK)'**.

Under the column **'Content'**, for other languages you will see the word **'Empty'**. For **English (UK)**, you will see a tick if a default has already been assigned – if not, you will also see the word **'Empty'**.

Next to the **'Content'**, you will see an **'Edit'** link. To define your application form, click **'Edit'**;

| Language     | Agreement Type | Content                    | Pre-Screening Rules  |
|--------------|----------------|----------------------------|----------------------|
| All          | All            |                            |                      |
| Arabic       | ANY - DEFAULT  | Empty <a href="#">Edit</a> | <a href="#">Edit</a> |
| Bulgarian    | ANY - DEFAULT  | Empty <a href="#">Edit</a> | <a href="#">Edit</a> |
| Croatian     | ANY - DEFAULT  | Empty <a href="#">Edit</a> | <a href="#">Edit</a> |
| Czech        | ANY - DEFAULT  | Empty <a href="#">Edit</a> | <a href="#">Edit</a> |
| Danish       | ANY - DEFAULT  | Empty <a href="#">Edit</a> | <a href="#">Edit</a> |
| Dutch        | ANY - DEFAULT  | Empty <a href="#">Edit</a> | <a href="#">Edit</a> |
| English (UK) | ANY - DEFAULT  | ✓ <a href="#">Edit</a>     | <a href="#">Edit</a> |

A box will appear on the screen and you will see the different elements which make up your online application form;

ONLINE APPLICATION PROCESS

EXTERNAL CANDIDATE AND EMPLOYEE PROCESS

Use different process for employees

active required

Step 1

Personal Information

Personal Information

Step 2

Structured CV

MASTER: Part 1 WMJob

Step 3

Attached CV

Free Form Resume

Other Attachments

Name

Description

Please upload your su...

Tip: You can upload/re...

+ Add another

Step 4

Questionnaire #1

Part 2 Master WMJobs

Step 5

Questionnaire #2

Diversity Information

Step (No Active Elements)

Attached Cover Letter

Free Form Cover Letter

Additional Configuration

Candidate Pack

Create candidate pack automatically

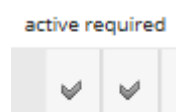
Select and Sort Documents

SAVE


You will see the different sections of the application form are broken up into **Steps** with a **Form Type** defined for each step.

The Form Type relates to those you create under **Forms/Questionnaires** within TalentLink.

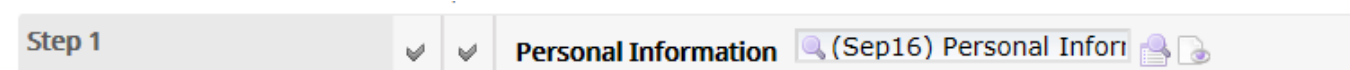
For each step, you will see an '**Active**' and a '**Required**' column;



'Active' shows that this step applies in your application process, whereas 'Required' means that a candidate cannot submit an application form unless this step has been completed.

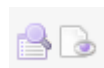
**Step 1 – Personal Information - will always be 'Active' and 'Required' and cannot be changed**

Next to the step form type, you will see a field which displays the name of the document currently assigned to that step within your environment.



## Changing a document against a Step

Next to the document name of each step, you will see two icons;



You can **preview** this document by clicking the  icon.

To **change** the document, click the  icon.

When you click the icon, a window will appear of all the documents available within your environment that you have access to for this step.

You can search for documents by using the fields at the top of the window.

You can enter the **Form name** of the document, search by **Department** and also by **Form type**.

If you click **Form type**, you will see the form type limited to that of what the step allows;

From the list of forms, you will see an '**Action**' column.

To **select** the form, click the icon.

To **preview** the form, click the icon.

To **edit** the form, click the icon.

Once you change a form, you will see in the field the name of the form change;

## De-activating a Step

If you wish to de-activate a step in your process as it's no longer required, for your **Structured CV** and **Questionnaire** steps, untick the '**Required**' tick;

Once unticked, **remove the name of the document** that sits within the document name field;

Step 4



Questionnaire #1



aching Form ( Profile



Once the field is blank, click on the window and the step will become de-activated;

Step (No Active Elements)

Questionnaire #1



For the **Other Attachments** step, if you click the cross next to the 'Name' and 'Description', this will de-activate this step;

Step 4



Attached CV  
Free Form Resume

#### Other Attachments

Name

Description



Please upload your su...

Tip: You can upload/re... x



+ Add another

Step (No Active Elements)



Attached CV  
Free Form Resume

#### Other Attachments

Name

Description

Please select

Please select



+ Add another



Step 1 cannot be de-activated

## Re-ordering a Step

Within the application process, you can re-order steps by dragging and dropping them in the order you wish;



ONLINE APPLICATION PROCESS

×

EXTERNAL CANDIDATE AND EMPLOYEE PROCESS

Use different process for employees

active required

Step 1

▼

▼

Personal Information

Personal Information

Step 3

▼

□

Questionnaire #1

Priority Movers Matchin

Step 4

□

□

Attached CV

Free Form Resume

Other Attachments

Name

Description

▼

Please upload your su...

▼

Tip: You can upload/re...

×

×

+ Add another

Step 5

▼

▼

Questionnaire #2

Diversity Information

Step (No Active Elements)

□

□

Attached Cover Letter

Free Form Cover Letter

Additional Configuration

Candidate Pack

▼

Create candidate pack automatically

Select and Sort Documents

SAVE

By re-ordering the steps, the step numbers will automatically change.

## 2. Defining Candidate Packs

Underneath the steps in your organisation's application form, you will see '**Additional Configuration**' in relation to the **Candidate Packs** created within TalentLink;

### Additional Configuration

#### Candidate Pack

☒ Create candidate pack automatically

#### Select and Sort Documents

- ☒ *Personal Information*
- ☒ *Structured CV*
- ☒ *Please upload your supporting statement which demonstrates your suitability for this role*
- ☒ *Questionnaires 1*
- ☐ *Questionnaires 2*

Firstly, you will see a tick box option, '**Create candidate pack automatically**'. By selecting this box, when an application is received into the system, the pack will automatically be created and accessible from the applicant list on a vacancy.

Underneath this option, you will see the different elements of your application form, with tick boxes under '**Select and Sort Documents**'.

Here, you can define which documents you want included in the Candidate Packs that are created, and you can drag and drop the names of the documents to determine your Candidate Pack order;

### Additional Configuration

#### Candidate Pack

☒ Create candidate pack automatically

#### Select and Sort Documents

- ☒ *Personal Information*
- ☒ *Structured CV*
- ☒ *Please upload your supporting statement which demonstrates your suitability for this role*
- ☒ *Questionnaires 1*
- ☐ *Questionnaires 2*

### 3. Email Templates

You have an option within your default application process to assign an auto-reply communication template which candidates will receive as a standard to confirm their online application form has been received.

Under 'Email Templates', the field 'Automatic Reply for Online Application' is where the communication sits.

#### Email Templates

Automatic Reply for Online Application:

Master WMJobs Automate



Attach copy of an application

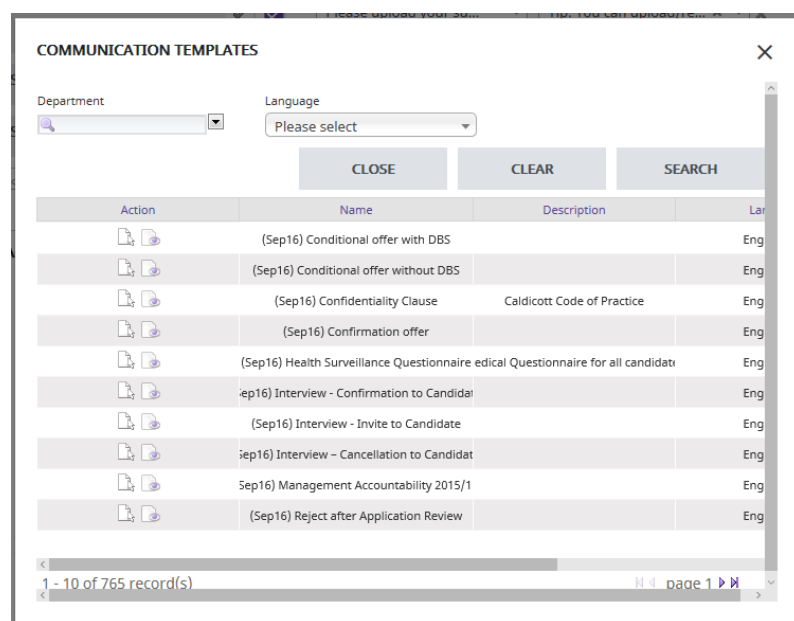
Automatic Reply for Email Application:











Master WMJobs Automate

To **preview** the communication template, click the  icon.

To **change** the communication template, click the  icon.


If changing the communication template, once you select the above icon, a list will appear of the templates sitting in your available organisations;



| Action  | Name   | Description                | Language |
|---|--|----------------------------|----------|
|  | (Sep16) Conditional offer with DBS   |                            | Eng      |
|  | (Sep16) Conditional offer without DBS  |                            | Eng      |
|  | (Sep16) Confidentiality Clause   | Caldicott Code of Practice | Eng      |
|  | (Sep16) Confirmation offer   |                            | Eng      |
|  | (Sep16) Health Surveillance Questionnaire Medical Questionnaire for all candidates |                            | Eng      |
|  | (Sep16) Interview - Confirmation to Candidate                                      |                            | Eng      |
|  | (Sep16) Interview - Invite to Candidate  |                            | Eng      |
|  | (Sep16) Interview - Cancellation to Candidate                                      |                            | Eng      |
|  | (Sep16) Management Accountability 2015/1   |                            | Eng      |
|  | (Sep16) Reject after Application Review  |                            | Eng      |



The communication templates available here are **Candidate Communications**

To **select** a communication template, click the  icon.

To **preview** a communication template, click the  icon.

Once you have made changes or define your Application Process, click 'Save'.

SAVE

## 4. Troubleshooting/FAQ's

### A default application process isn't pulling through to new vacancies

As a standard, when you update your default application process, this will appear on **new vacancies**.

If a default application process isn't pulling through to new vacancies, this could be in relation to the language you have selected when updating or creating the application process;

| Language     | Agreement Type | Content | Pre-Screening Rules  |
|--------------|----------------|---------|----------------------|
| All          | All            |         |                      |
| Arabic       | ANY - DEFAULT  | Empty   | <a href="#">Edit</a> |
| Bulgarian    | ANY - DEFAULT  | Empty   | <a href="#">Edit</a> |
| Croatian     | ANY - DEFAULT  | Empty   | <a href="#">Edit</a> |
| Czech        | ANY - DEFAULT  | Empty   | <a href="#">Edit</a> |
| Danish       | ANY - DEFAULT  | Empty   | <a href="#">Edit</a> |
| Dutch        | ANY - DEFAULT  | Empty   | <a href="#">Edit</a> |
| English (UK) | ANY - DEFAULT  | ✓       | <a href="#">Edit</a> |

You need to ensure that the default application form sits against **English (UK)**.

If you find a specific user is experiencing this issue, it could be that they are logged on to the system as **English (US)** rather than **English (UK)** which could be having an effect.

Also, ensure that the application process hasn't been updated by another user on a job level.

### I'm updating an application step and can't find the form I'm looking for

This is more than likely in relation to the form type attached to the step. For example, if you are trying to add a 'Questionnaire' to your Personal Information Step (Step 1), this step only allows you to add a 'Candidate PIF', hence why you wouldn't be able to find the form.

Against each step, you will see the form type which will help you;

ONLINE APPLICATION PROCESS

EXTERNAL CANDIDATE AND EMPLOYEE PROCESS Use different process for employees

active required

|                           |                       |                        |
|---------------------------|-----------------------|------------------------|
| Step 1                    | Personal Information  | Personal Information   |
| Step 2                    | Structured CV         | MASTER: Part 1 WMJob   |
| Step 3                    | Attached CV           | Free Form Resume       |
| Step 4                    | Questionnaire #1      | Part 2 Master WMJobs   |
| Step 5                    | Questionnaire #2      | Diversity Information  |
| Step (No Active Elements) | Attached Cover Letter | Free Form Cover Letter |

Additional Configuration

Candidate Pack

☒ Create candidate pack automatically

Select and Sort Documents

SAVE

It may be helpful to take a look under 'Forms/Questionnaires' within your environment to ensure the form you are trying to find hasn't been archived;

**Lumesse** Search...

**FORM TYPES**

Forms in organisations: All Organisations

Form type: Form types

Form master language: All

View: Current forms, Archived forms

## I've updated the default application process but candidate packs aren't reflecting the change

Firstly, check to see if your application process hasn't been changed on a job level. This could be why the candidate pack for a role doesn't reflect your default process.

Also, within your default application process, if the steps within your process haven't been selected as **'Required'**, the candidate has the option whether to skip this step within the process, which could be a reason why a candidate pack wouldn't include all the steps you expect it to.

active required

☒ ☒

Also, check to see if the elements of your application process have been checked within the configuration for your Candidate Pack;

### Additional Configuration

#### Candidate Pack

☒ Create candidate pack automatically

#### Select and Sort Documents

- ☒ *Personal Information*
- ☒ *Structured CV*
- ☒ *Please upload your supporting statement which demonstrates your suitability for this role*
- ☒ *Questionnaires 1*
- ☐ *Questionnaires 2*

## You can now define and amend a Default Application Process!

We have outlined in this guide the essential information you need to about your Default Application Process within TalentLink.

We have created several resources for you to use which sit on the **Solutions tab on the Service Centre** to help you.

You can visit the Service Centre at <http://wmemployers.freshdesk.com/helpdesk>



Default Application Process is a short module featured in our **Open House Configuration Training**. If you or any colleagues are interested in attending an open house training session, please contact the team who will be able to provide you with further information.