Job Approval Process
CREATING AND AMENDING YOUR PROCESS

Introduction

The Job Approval Process within TalentLink allows you to define steps that a job must go through before it is approved or posted.

As an Local System Administrator, you can create and amend processes within your environment and define the Business Rules for each approval step based on your requirements.

You can restrict or grant access to major functionality at each step.

This guide will cover the following;

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.
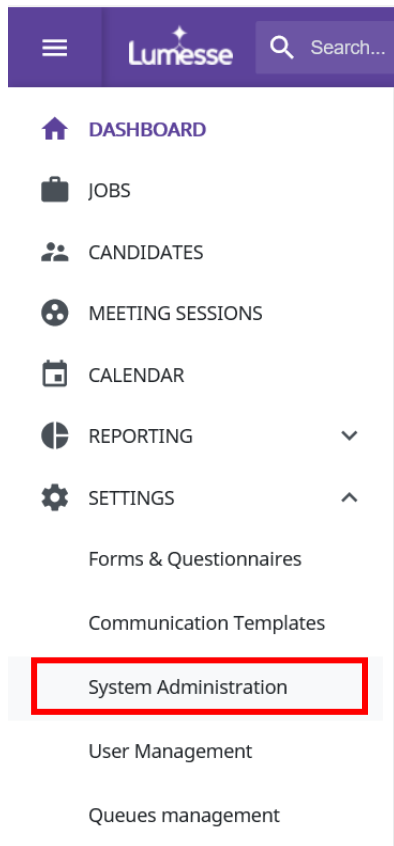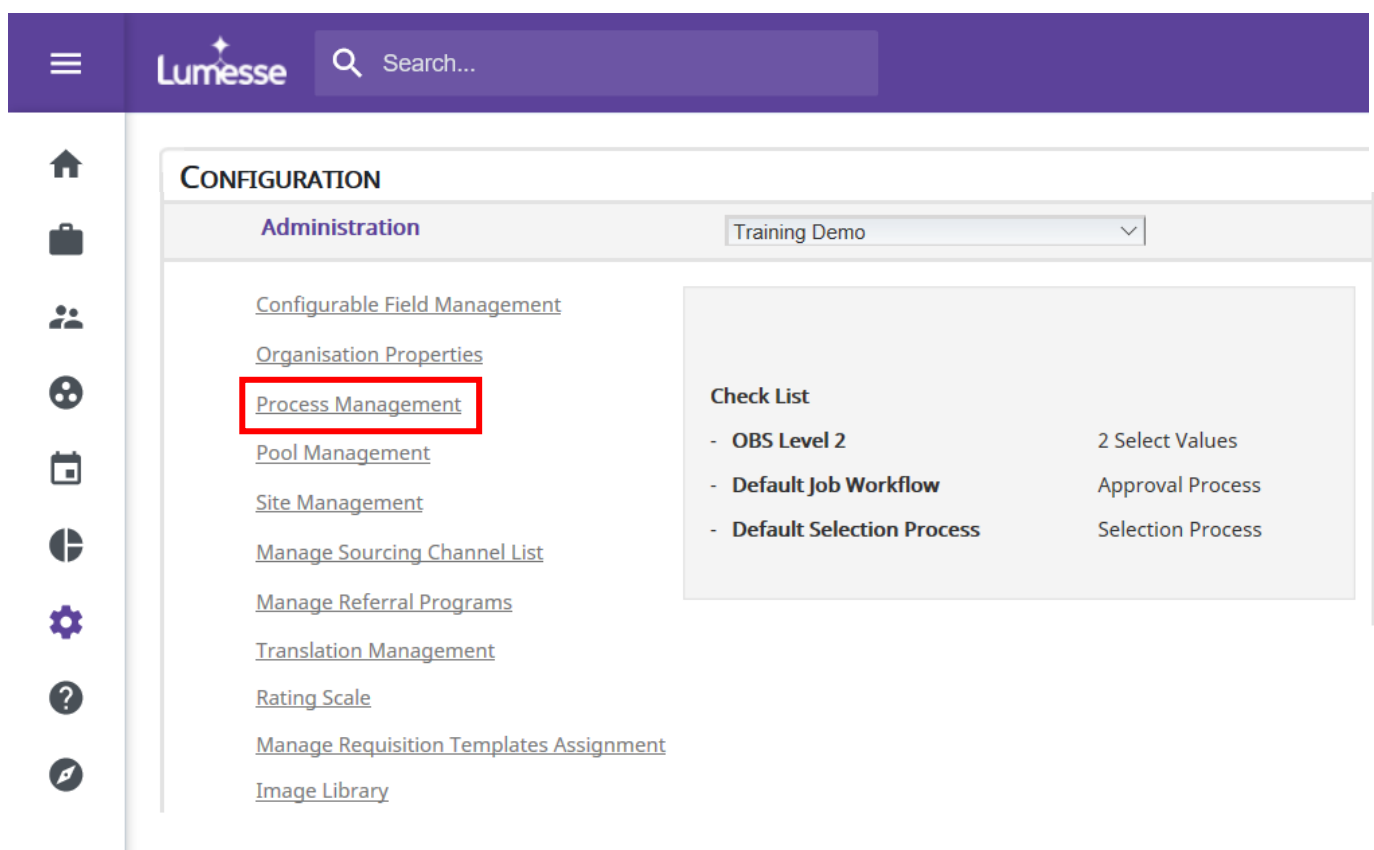
Top tips

Important Information

Best Practice
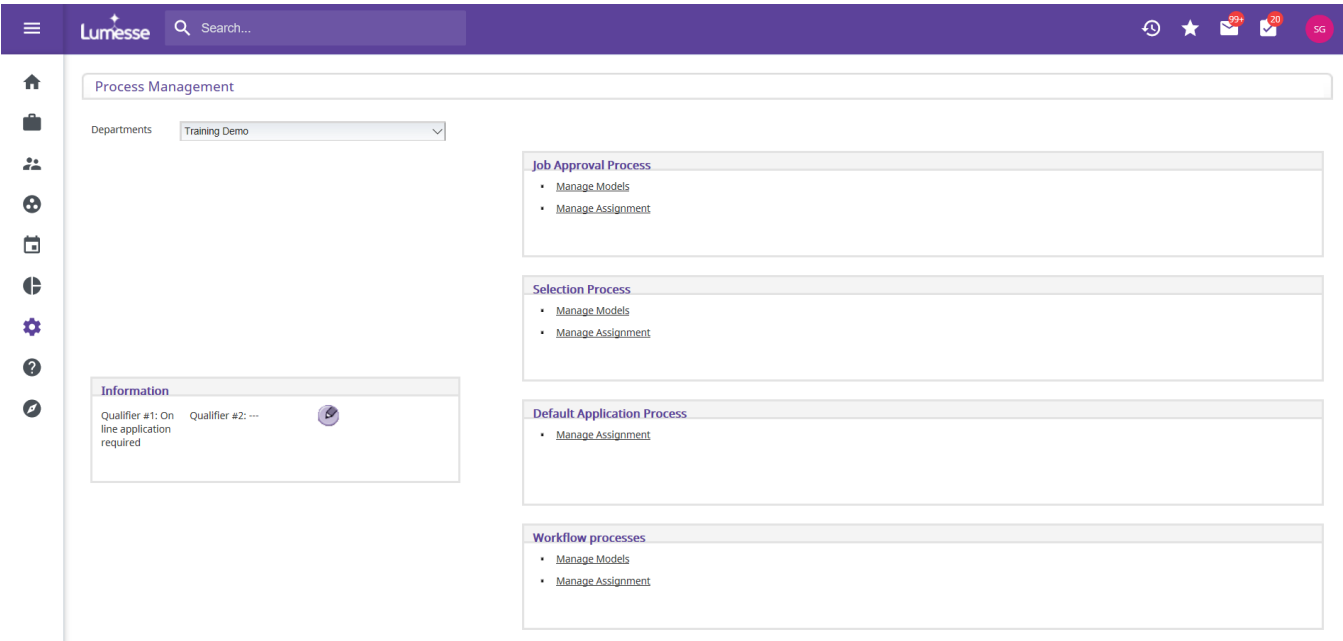
1. Creating a Job Approval Process

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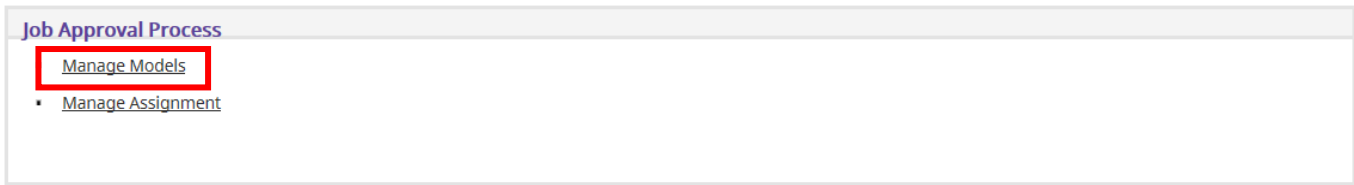

From the list under 'Administration', select, '**Process Management**';

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

To create a process, under '**Job Approval Process**', click '**Manage Models**';

When you click onto the link, a list will appear of all the processes which currently exist in your environment;

You can see from the list which processes are enabled and which process is set as your default Job Approval Process.

To create a new process, at the bottom right of the screen, **click the** **icon.**

The system will then ask you to name your process along with a few other details;

T: 0121 569 2070   E: helpdesk@wmemployers.org.uk   W:www.wmemployers.org.uk

Under '**Workflow name**', enter the name of the process you are creating.

It will show you the **Organisation** the process will sit under once it's created. If you wish to change this, click the pencil icon next to 'Organisation'.

You will only be able to change this if **you have access to multiple Level '1' organisations within TalentLink**

Enter the '**Description**' of your process and a '**Comment**' if necessary.

You will then see three tick box options;

At this point when creating your **new Job Approval Process**, you are **unable to tick or un-tick any of these options**. You will need select these once you save your process

Once you have entered the details of your new process, click the 'Save' icon at the bottom right on the screen;

Once you save, you can then **Enable your Job Approval Process** by unchecking the 'Disable' box;

'**Hide Job Workflow Tab**', will hide the 'Job Approval Process' tab on a vacancy;

We suggest as good practice to **leave this box un-ticked**

'**Set as the Default process in this organisation**' is determined in another place within the system. Please see page……..

Once you save your Job Approval Process, this will open-up '**Process Properties**', which allows you to build-up the steps in your new process;

Process Version | Version 1 -- Last Version ∨ |

| **Process Properties** |

Step 1
☑ Enable Step

Step Name	_____ * 🖊			
Approval Chain Type	Sequential ∨	Concerned team	_____ *	Select Step type
Ignition type	Manual	Duration	_____ Days	
Number of active Signatures	1 ∨			
One Active Signature is mandatory	●			
All Active Signatures are mandatory	○			
Communication Template	_____ 🖊 ⊗	📘 Define business rules to apply when this step is active		
		○ Define as Final Step		

You can build **4 Job Approval Steps**, with up to **5 Approvers for each Step**

One by one, you will build the steps that you need to the process.

When you are building the steps in a process, once you have created them, **you are unable to re-order them or delete individual steps** so ensure that you are sure of what order the steps are in the process you are creating

To start building the first step, under 'Step 1', where it reads 'Step Name', click on the 🖊 to name the step.

A pop-up will appear;

Enter the name in the field next to '**Generic Step Name**' and click '**Save & Close**'.

You then need to select your '**Approval Chain Type**';

You will see two options – **'Collaborative'** and '**Sequential'**.

For **Sequential**, the signatures against the step when a vacancy is sent for approval must be received in the defined order, so when the first signature is received, the request for the second signature is sent, and so on. For **Collaborative**, all signature requests are sent at the same time and it does not matter in which order they come in.

Then you select '**Ignition Type**';

For '**Step 1**', **this will always be 'Manual'**

When you get to the next step, you will see a new option here under a drop-down – '**Automatic**'.

For **Manual**, a user must submit the signature request manually – this is why Step 1 is always Manual,

For **Automatic**, once the approval chain starts, TalentLink automatically submits the next step when the signature(s) is received. Where Automatic is selected a check box From Approver of the Preceeding Step is displayed. The check box is selected by default and approval emails are sent from the configured email address. If this check box is not selected, approval emails will be sent from the email address configured in the communication template used for the step.

Next, you select the '**Number of active signatures**';

Number of active Signatures   1 ∨

As previously stated, you can select up to five active signatures for each step, which means you can have up to five approvers defined for each step.

Next you will see two tick box options;

One Active Signature is mandatory   ●
All Active Signatures are mandatory   ○

Where '**One Active Signature is Mandatory**' is selected, only one approval signature is required to sign off the job. If '**All Active Signatures are Mandatory**' is selected, all approvers must sign off before the job can be approved.

You then need to select the Communication Template which will be sent to the Approver of this step.

Next to 'Communication Template', select the ✐ icon;

Communication Template

A pop-up box will appear, and from the list, you will select the Job Approval Process Communication Template needed for the step;

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global3.**mrtedtalentlink.com**/private/common/common_selecttemplate.cfm?Type=MA

SELECT AN EMAIL TEMPLATE

FILTER

Organisation	Training Demo ▾	Language	All ▾

	NAME	DESCRIPTION	LANGUAGE	ORGANISATION
●	TD Job Requisition Approval Request		English (UK)	TD000

page 1/1 Go to page ▾

CANCEL   OK

Once you have selected the template, click '**Ok**'.

You will then need to select '**Concerned Team**'. Next to the field, you will see a link - 'Select Team Type'. Click on the link;

Concerned team   *   Select Step type

A pop-up box will appear with a list of teams;

https://global3.mrtedtalentlink.com/private/adm/adm_getsteptype_popup.cfm?Rank=1&Action=Adm_Approval

SELECT A JOB WORKFLOW STEP TYPE

	Step Type	Users allowed to SUBMIT this step type	Users allowed to ASSIGN this step type	Users allowed to APPROVE this step type
Select	Type 1	Functional manager, Hiring Manager MSS, Hiring Manager MSS Limited, Job Approver All, Local Functional Manager, MSS Job Creator, Recruiter (deprecated), Recruiter Extensive, Standard General Application Recruiter, Standard Hiring Manager, Standard Recruiter, Standard Recruiter Secured	Functional manager, Job Approver All, Local Functional Manager	Functional manager, Job Approver All, Local Functional Manager, Recruiter (deprecated), Recruiter Extensive, Standard General Application Recruiter, Standard Hiring Manager, Standard Recruiter, Standard Recruiter Secured
Select	Type 2	Functional manager, Hiring Manager MSS, Hiring Manager MSS Limited, Job Approver All, Local Functional Manager, MSS Job Creator, Recruiter (deprecated), Recruiter Extensive, Standard General Application Recruiter, Standard Hiring Manager, Standard Recruiter, Standard Recruiter Secured	Functional manager, Job Approver All, Local Functional Manager	Functional manager, Job Approver All, Local Functional Manager, Recruiter (deprecated), Recruiter Extensive, Standard General Application Recruiter, Standard Hiring Manager, Standard Recruiter, Standard Recruiter Secured
Select	Type 3	Functional manager, Hiring Manager MSS, Hiring Manager MSS Limited, Job Approver All, Local Functional Manager, MSS Job Creator, Recruiter (deprecated)	Functional manager, Job Approver All, Local Functional Manager	Functional manager, Job Approver All, Local Functional Manager, Recruiter (deprecated)
Select	Type 4	Functional manager, Job Approver All, Local Functional Manager, Recruiter (deprecated), Recruiter Extensive, Standard Hiring Manager, Standard Recruiter, Standard Recruiter Secured	Functional manager, Job Approver All, Local Functional Manager	Functional manager, Job Approver All, Local Functional Manager, Recruiter (deprecated), Standard Hiring Manager, Standard Recruiter Secured
Select	Type 5	Functional manager, Job Approver All, Local Functional Manager, Recruiter (deprecated)	Functional manager, Job Approver All, Local Functional Manager	Functional manager, Job Approver All, Local Functional Manager, Recruiter (deprecated)
Select	Type 6	Functional manager, Job Approver All, Local Functional Manager, Recruiter (deprecated), Recruiter Extensive, Standard General Application Recruiter, Standard Hiring Manager, Standard Recruiter	Functional manager, Job Approver All, Local Functional Manager	Functional manager, Job Approver All, Local Functional Manager, Recruiter (deprecated), Standard General Application Recruiter, Standard Hiring Manager
Select	Type 7	Functional manager, Job Approver All, Local Functional Manager, Recruiter (deprecated)	Functional manager, Job Approver All, Local Functional Manager	Functional manager, Job Approver All, Local Functional Manager, Recruiter (deprecated)

CANCEL

The '**Team Type**' **will always be 'Type 1'**

Next to '**Type 1**', click the '**Select**' link.

You will then need to specifiy the '**Duration**' of the Step;

Duration   [ ] Days

'Duration' is the delay that elapses before the signature is set as overdue. Both the approver and the lead recruiter linked to the job will be notified of the overdue status.

Duration days include weekends, so a value of 7 would cover Monday to Sunday

You are then in a position to '**Define the Business Rules**' for your Step. This defines what can be done **BEFORE** the step has been approved.

To define to the rules, click on the [icon] next to '**Define business rules to apply when this step is active**';

Define business rules to apply when this step is active

A pop-up window will then appear with the rules you can specify;

The rules are split into three sections;

Tab Properties – this defines which sections of the job can be updated before it's approved

Posting – this defines whether you can post the job in question before it is approved

Budget & Cost – Enable users to add actual and forecast costs to the job

You can choose what rules apply to your step by ticking the box next to each rule.

Defining Business Rules for each step is important. These rules control the actions recruiters can and cannot perform when the job is at a particular approval step. You can, for instance, prevent a job from being published until it is approved

To select **all rules**, click the at the top right of the screen.

Once you have chosen the rules, click '**Save**' at the bottom of the pop-up.

You can then see the details of your step populated;

Under 'Step 1', you will see a check box for '**Enable Step**'.

'Enable Step' will automatically be ticked for 'Step 1', but for any other steps you create, **you need to enable each step for them to appear live in your process**

To create more steps, follow the actions described above.

When you get to the last step, you will need to define this by selecting 'Define as Final Step';

Once defined, scroll to the bottom of the screen and you will see the below options;

Here, you need enter the name which will display in your Job Approval Process Tab once the vacancy has been approved. This will appear on your vacancy, although this can be customized to what you want;

To enter the name, click on the ⊘ next to '**Name to display when Last enabled step is approved**';

A pop-up box will appear;

Enter the name in the field next to '**Generic Step Name**' and click '**Save & Close**'.

You will need to define the business rules when the Job Approval Process is complete. Follow the steps shown on **Pages 9-10**.

Once your process has been build, click the save icon at the bottom right of the page;

Once you save the process, this will take you back to the list of Job Approval Processes within your organisation, but now you will see your new process that you have created;

Remember you need to enable your process - if you have enabled your process, you will see a tick in the column, '**Enabled**'.

2. Copying a Job Approval Process

Within TalentLink, you are able to copy a Job Approval Process which has been created previously, which could be a good starting point for a new process, however, as previously stated, you are unable to delete or re-order steps already existing in a process.

To copy a Job Approval Process, navigate to '**Process Management**' and click '**Manage Models**' as outlined on **pages 3-4**.

You will see the list of your process that exist in your environment. Click on the **Model Title** of the Job Approval Process you wish to copy.

This will allow you to view the process which has been created. To copy the process, click the icon under '**Process Information**';

Once you click the icon, this will bring up a pop-up box which is asking you which organisation you want to copy the process to.
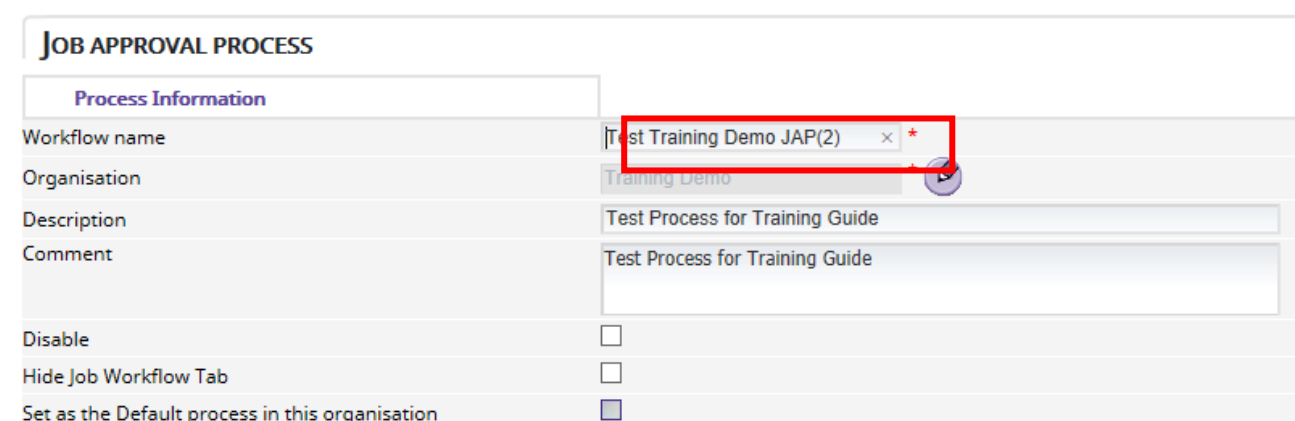
This will differ on a user basis depending on what organisations you have access to, however, **you can copy a Job Approval Process from one organisation to another**

Select the organisation you want to copy the process to by clicking '**Select**' next to the name of the organisation;

Once you click 'Select', this will refresh your TalenLink screen and you will see a number in brackets next to the title of the process you have copied;

Once you have copied the process, scroll to the bottom of the page and click the save icon.

3. Amending a Job Approval Process

As stated on page 6 of the guide, once you have created a Job Approval Process, **you are unable to delete or re-order the steps which sit in the process**, however, you are able to **disable steps** and make changes to the steps themselves and override the steps if necessary.

To make changes to a Job Approval Process within your environment, navigate to '**Process Management**' and click on '**Manage Models**' under '**Job Approval Process**' as outlined on **pages 3-4**.

Click on the **Model Title** of the Job Approval Process you wish to amend.

This will take you to the **Process Information** and **Process Properties** screen;

If you want to remove a step in your process that is no longer required, you will need to disable the step.

Underneath the step number, you will see a check box '**Enable Step**'. Untick this box to disable the step;


You are unable to disable Step 1. If Step 1 is no longer required, you would need to move Step 2 as your Step 1 and rebuild the process from there

You can make any other changes to your steps by selecting other options from the drop-down menus, or clicking the pencil icons next to the fields to change titles or a Communication Template, for example.

You can change the business rules for each step and change your final step.

Once you have made your changes, scroll to the bottom of the page and click the 'Save' icon.

Depending on what changes you have made, you may see a prompt from the system appear;
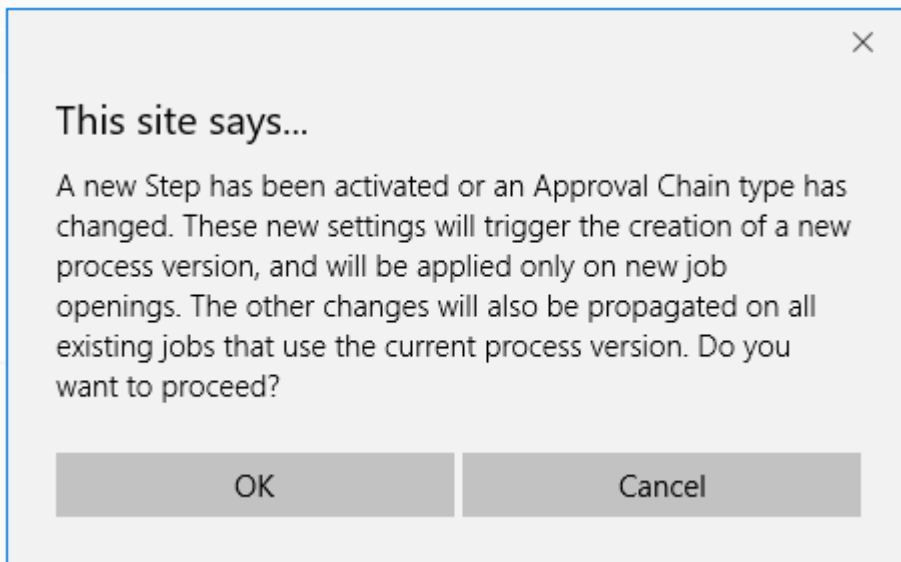
This means that the amendments you have made will only appear on new vacancies that are created in TalentLink.
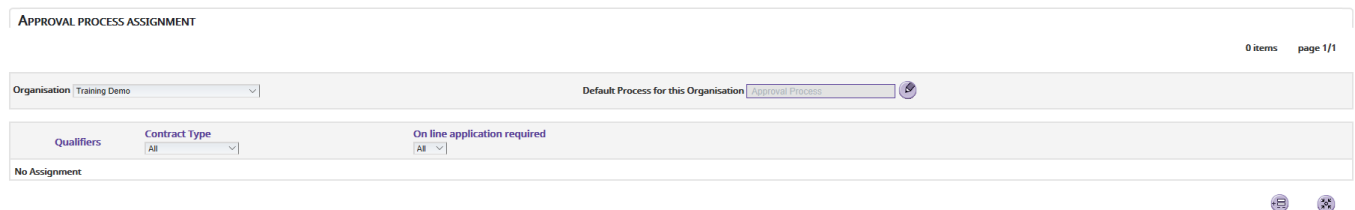
4. Setting a default Job Approval Process

If you have created a new process which you now want to set as your organisation's default, you can do this through '**Manage Assignment**' in '**Process Management**';
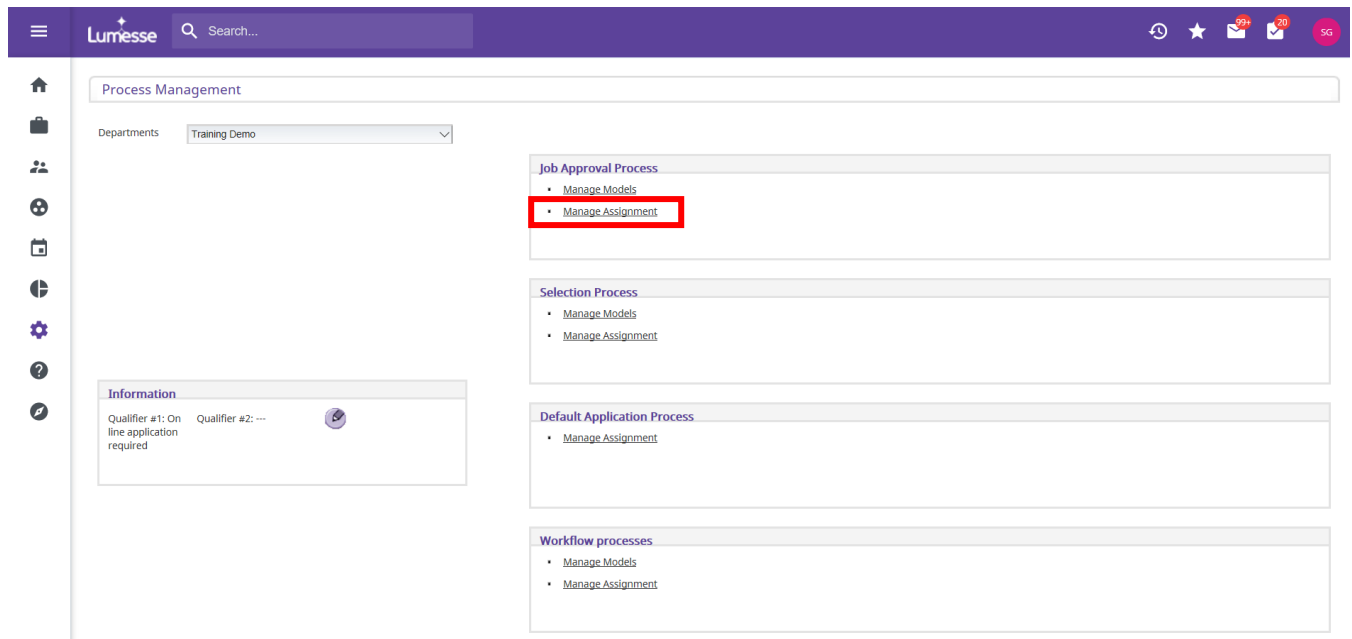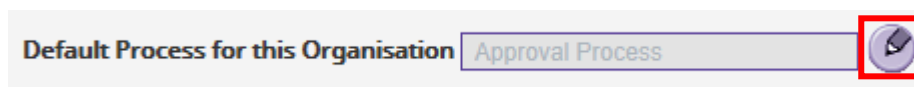

Click on '**Manage Assignment**'.

Once you have clicked, you can then see your **Approval Process Assignment** screen.

Along the top of the screen, you can see the field '**Default Process for this Organisation**'.

To change your default process, click the icon next to the field;

A pop-up will then appear, listing all the Approval Processes available within your environment;

Click on the **Workflow name** of the process you wish to set as your default.

This will then change your default;

5. Using a Qualifier for a Job Approval Process

Within TalentLink, you can set-up a **Qualifier** which can be linked to a Job Approval Process or a Selection Process.

What this means is that you can assign a specific process based on a qualifier which is selected when a vacancy is raised on TalentLink. For example, if you wanted a different Job Approval Process for external and internal vacancies, this could be achieved by using a Qualifier.

For more information and how-to set-up Qualifiers, please visit our **Process Management Topic Home Page** on the **Service Centre**.

6. Troubleshooting/FAQ's

I've created a new Job Approval Process but isn't appearing active on new vacancies
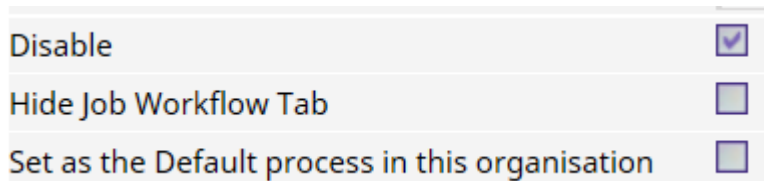
There could be several reasons why your Job Approval Process isn't active;

The process hasn't been enabled or the new steps within the process haven't been enabled

You can enable your process by navigating to '**Process Management**', and for Job Approval Process, select '**Manage Models**';

Job Approval Process
- Manage Models
- Manage Assignment
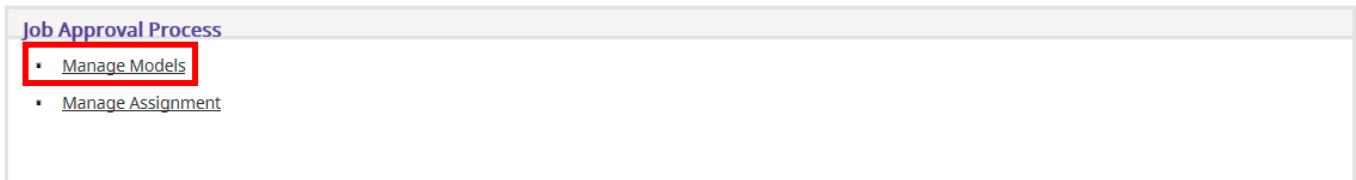
Under **Process Information**, you will see the option 'Disable' here;

Disable	☑
Hide Job Workflow Tab	☐
Set as the Default process in this organisation	☐

Make sure this box has been unticked.

To ensure your steps are enabled, within **Process Properties**, underneath the number of the step will be a check box – '**Enable Step**';

Step 2
☑ Enable Step
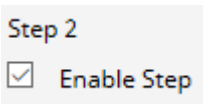
Ensure this box is ticked.

Also, be mindful that new processes will only apply to new vacancies created within TalentLink. If a vacancy already exists in your environment but hasn't been approved, this will be linked to **your old process**.

The new process hasn't been linked to an existing Qualifier

If you have a Qualifier linked to a Job Approval Process currently, it could be that you haven't assigned the process to an option within the Qualifier. For more information about Qualifiers, **please visit our Service Centre**.

The new process isn't linked to a Qualifier, but hasn't been set as the default for the organisation

If you aren't using a Qualifier for your Job Approval process, ensure that your new process has been set to your **default process for your organisation**.

I've created a new Job Approval Process but can't post or amend any vacancies

This will be linked to the **business rules** you have defined for your steps.

You define business rules for each step which apply when the **step is active**, and also, when the vacancy has been fully approved.

You need to ensure that at some point within your process, you define a rule which allows you to post vacancies or update Job Requisitions;

This can be updated within your process, but again, be mindful, your changes will only apply to **new vacancies**.

I've created a new Job Approval Process but I'm not receiving approval emails

This is more than likely linked to the Communication Template against the step within your Job Approval Process.

If you check your process, you need to ensure that a Communication Template has been allocated to the step which emails aren't being received for.

If the Communication Template field is blank, this is why an email wouldn't be received;

You can allocate a template and save the process to rectify the issue.

If all the Communication Template fields have been populated, check to see that the relevant Team Member has been allocated when creating the vacancy – it may be the email has gone to another user;

There is usually a short delay on Job Approval emails being received, but depending on the usage of TalentLink at the time of using your new Approval Process, there can be a short delay on emails being received, therefore, if all of the above has been checked, please ensure you have waited **30-minutes** for the email to come through.

Also, please ensure you have checked any **Junk Mail** folders where the email may have appeared.

If you are experiencing high volumes of Junk Mail, this could be a local IT setting - we have **a Technical Requirements document listed on the Service Centre** to give advice on the behaviour of emails within TalentLink, but please check with your local IT department.

You can now create and amend Job Approval Processes!

We have outlined in this guide the essential information you need to manage your Job Approval Process within TalentLink, along with guidance on how to create new ones.

For more information around Configuration, please visit our **Topic Homepages** on our Service Centre at http://wmemployers.freshdesk.com/helpdesk

Job Approval Process is a 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.