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| Primary Persona: | Recruitment Consultant |
| Configuration Settings | Client: Web Client (UCI) (Browsers: Chrome, Edge)  Mobile: UCI Forms |
| Problem / Opportunity Statement: | I would like to finalise a Placement, have the system tell me when it’s live, and be given the opportunity to extend a Placement for both the Contract and Temporary types |
| Pain Points: | Due to a no-code approach, have had to apply wait clauses to workflows to set the Placement status to live when the start date is in the past. Preferred would be scheduled on-demand workflows running against Placements that fit the criteria for a change to live.  No way to read from process. Additional Now() calculated field required to compare against.Unable to read calcaulted fields on workflow. Set to Timeout until 1 minute after defined start date, this will result in all ‘Issued’ placements having a single waiting workflow against them. |
| User Goals: | Record Placements for Clients, be able to manage the live process and be able to extend Contract and Temporary Placements while maintaining the Financial Integrity of our original records. |
| Business Goals: | Lock down records where all agreements on financials have been resolved. Calculate when Placements will end to enable for chasing on extensions, allow for Placements to be extended while maintaining a way to negotiate the terms without the need for a full Vacancy and Shortlist process. |
| Triggers: | Business Process Flow in place to trigger finalise and extension routines while maintaining integrity of form values. |
| Narrative Description (e.g., plans, evaluation, actions, objects, context, events): | Ensure that key contacts can be maintained, and that all calculations are carried throough from the Shortlist to the Plaement record. Ensure the form is clean by use of business rules which show/hide required fields based on Type of position defined at the Vacancy level. Where we have Contract and Temporary type placemtents we should define an end date based on number of weeks planned to work. A date should be calculated 2 weeks before the end date, so that extensions can be planned, extenstions should allow for negotiation based on the original terms finalized on the Placement that is being extended. |
| Detailed Steps | 1. ***Create new Entity, Placement*** 2. ***Design Form*** 3. ***Ensure all details are copied from Shortlist to Placement when shortlist is Accepted*** 4. ***Define rules for form to ensure only relevant fields are shown*** 5. ***Lock down fields to maintain financial and client integrity inherited from Vacancy and Shortlist Process*** 6. ***Add Business Process Flow to enable the fianlisation and making live of a Placement*** 7. ***Define wait workflows to allow for automation of ‘Live’ state on a Placement*** 8. ***Mimic finance fields to allow for capture of extension details on Contract and Temporary Placements.*** 9. ***Associate quickview form for addresses to the Placement main form.*** |
| Success Metrics: | 1. Are you prevented from creating a new Placement outside of the Vacancy – Shortlist progression process 2. Are all finance and client fields locked when a new Placement is created 3. Are different fields shown based on the type of a Placement 4. If the Start date is in the future, and the placement finalized is the status of the Placement set to Issued 5. If the Start date is in the past, and the placement finalized is the status of the placement set to Live 6. On the Contract or Temp placement is the placement closed if an ‘Actual End Date’ is entered 7. For a permanent Placement, does the record get set to Inactive once the start date is in the past and finalized is set to yes 8. For Temp and Contract Placements, is an End Soon date calculated from the Original end date 9. Are you able to extend a Temp or Contract Placement 10. Do all GP calculations carry out as expected on a Extended Placement. 11. Do all calculations around end date respect new data entered into an extended Placement. 12. Do extended Placements allow for further extensions 13. Do extened Placements calculate to start one day after the original Placement is due to end 14. Are Invoice and Paperwork Contacts on the Placement locked to only be Contacts of type Contact/Both from the associated Client. 15. Are you able to view but not amend details of the working address via a quick view on the Placement form. |

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| Primary Persona: | Recruitment Consultant |
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| Problem / Opportunity Statement: | I would like to record details of a Candidates interest in a Vacacny, in such a way that I can progress a single Candidate against multiple Vacancies at once, to ensure that one person can have maximum presence across all related Vacancies. |
| Pain Points: | Business Rules do not allow for Interactions with Sections, resulting in all fields needing addition to a rule, furthermore, if a field is not displayed on a form, then the rule simply fails to run at all. Validation does not display missing fields when a rule is set to run only in the context of a form.  Mandatory fields set for certain selections needs to be unset as individual steps within a business rule, where fields are hidden it would have been useful to clear any mandatory requirements as part of that step. Multiple errors with mandatory values being requied but not visible to be set.  Limited number of splits on Business Process Flow resulted in some variables not being exposed for negotiation.  Conditions set on form must be exposed on hidden step of BPF to be used as branches in the flow. |
| User Goals: | Link a Candidate to potentially multiple vacancies at once and progress them individually against each one. |
| Business Goals: | Ensure a Candidate can be linked to multiple vacancies, reduce the time taken on administrative tasks as a Candidate is progressed against a Vacacny, provide a clear visual indidicator as to the progression state of a Candidate. Ensure that Candidate terms can be negotiated with the individual which will be reflected in any won Placement work. |
| Triggers: | Status Reason (statusreason: Option Set) |
| Narrative Description (e.g., plans, evaluation, actions, objects, context, events): | Allow N:N linking of Candidates to Vacacnies, with individual status progression for each. Using an intermediatary table of Shortlists (1:N:1) will achive this and allow for data points to be adjusted and negotiated between any Candidate and any Vacacny without immediately impacting on either record. Keep Vacacny data updated with relevant progression from the Shortlist. Minimise data input on the Shortlist by mapping common fields from the Vacancy onCreate.  Minimise administrative tasks when progressing a Shortlist. Update Vacancy when closed by a Shortlist acceptance.  Allow for rejection of a Shortlist at any point in the process |
| Detailed Steps | 1. ***Create new Shortlist Entity*** 2. ***Adjust Status Reason to include all soft status required for Shortlist progression*** 3. ***Hook BPF with workflows to adjust status reason as Candidate is progressed*** 4. ***Ensure only Candidate listed people can be included on Shortlists*** 5. ***Ensure Rejection process can be triggered by assigning a reason*** 6. ***Map fields from Vacancy to Shortlist onCreate*** 7. ***Branch BPF to allow for change of fields based on type*** 8. ***Ensure Gross Profit field calculates from Shortlist fields*** 9. ***Add Quick Create form for use with Vacancy Sub-Grid*** 10. ***Create Sub-Grids/Views for use across system*** 11. ***Ensure all status changes trigger creation of a Shortlist Update*** 12. ***Create Kanban board of status updates*** |
| Success Metrics: | 1. Are you able to record details of a Shortlist 2. Are you able to see different fields on the Shortlist based on type 3. Are you presented with a flow across the top of the record with which to update the record 4. When a Shortlist is created, is an email sent out notifying the candidate of details from the ‘Job Spec’ of the Vacancy. 5. Do you have to use this flow in order to change the status of the record 6. If Pay/Charge/Salary/Fee Based On type fields are changed, does the Gross Proift recalculate with new values. 7. If at any point you put a value in the ‘Rejection Reason’ field, is the record made inactive with a state of ‘Rejected’ 8. Does the Business Process Flow dynamically update between Rejected/Accepted on change of the field in the Offer Response stage 9. On the Interview Stage, are emails generated based on the ‘Send Confirmation’ flags. 10. If selected in the Accept Offer stage, is the associated Vacacny closed with the reason given. 11. Upon Accept closure, is a Placement record generated 12. Are details from the Shortlist copied to the Placement upon creation. |

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| Problem / Opportunity Statement: | I would like to record details of a Vacancy for a Client, and only be shown relevant information to the type of Vacancy that I’m creating, so we can report on and manage jobs for Clients, while ensiring data is easy to input. |
| Pain Points: | Business Rules do not allow for Interactions with Sections, resulting in all fields needing addition to a rule, furthermore, if a field is not displayed on a form, then the rule simply fails to run at all. Validation does not display missing fields when a rule is set to run only in the context of a form.  Mandatory fields set for certain selections needs to be unset as individual steps within a business rule, where fields are hidden it would have been useful to clear any mandatory requirements as part of that step. Multiple errors with mandatory values being requied but not visible to be set.  Intermediatry entity required to progress Candidates against multiple Vacancies at once. |
| User Goals: | Record possible Vacancies for the Client and be able to differentiate them by the type of position the Vacancy is.  Minimise time spent calculating profit by entering details we can discuss with the Client.  Be able to see all Candidates associated to a Vacancy easily, |
| Business Goals: | Ensure a clear demarcation of User Interface with regards to the three Vacancy types, allowing different information to be captured resulting in a calculation to determine possible Gross Profit for each record. This needs to be reportable against both Clients and the wider business. |
| Triggers: | Type of Position (mlite\_typeofposition: Option Set)  Value set here results in UI display relevant to the chosen value  Fee Based On (mlite\_feebasedon2: Option Set)  Values made mandatory/cleared based on this value  Fee Based On (mlite\_paytype: Option Set)  Values made mandatory/cleared based on this value |
| Narrative Description (e.g., plans, evaluation, actions, objects, context, events): | Ensure a single table of all Vacacny entities regardless of type, minimizing tables required to hold common data while ensuring a clean UI experience for data capture. Ensure that all potential financials are calculated by the system and presented in an easily reportable way. Candidated must be progressable against multiple vacacnies at once, so a direct link between the Candidate and Vacancy will not be possible, an intermiedatary entity ‘Shortlist’ will be used instead. Subgrids should be referenced as Candidates to demonstrate the true link between these entities. |
| Detailed Steps | 1. ***Create new Vacancy Entity*** 2. ***Establish fields required to calculate Permanent positions (Salary/%Fee or Fixed)*** 3. ***Establish fields required to calculate Temporary positions (Pay/Charge Weeks/Days/Hours)*** 4. ***Establish fields required to calculate Contract positions (Pay/Charge Weeks/Days/Hours)*** 5. ***Establish fields required to calculate Contract positions (Pay/Charge Weeks/Days/Hours or No of Days)*** 6. ***Create form with Business Rules to Show/Hide fields based on Type*** 7. ***Ensure fields required for calculations are cleared/made mandatory to prevent interruption of calculations*** 8. ***Limit contact lookups to be locked to parent clients.*** 9. ***Limit Mlite Address lookups to be related to parent client*** 10. ***Assign Flip-Switch values for any Boolean type fields.*** |
| Success Metrics: | 1. Are you able to record details of a Vacancy 2. Are you able to specify Permanent pay details with matching type 3. Are you able to specify Contract terms with matching type 4. Are you able to specify Temp terms with matching type 5. Is the Gross Profit calculated for you based on input on the financials/terms fields 6. Does the form UI respond to changes made in real time 7. Does the GP field reliably calculate if terms such as Fee Based On are changed 8. Are you able to associate Candidates to a Vacancy via the Shortlist 9. Can you only associate Contacts from the Client as key contacts on the Vacancy 10. If you update a Vacancy Type after all financials have been calculated, does the Gross Profit update to reflect any changes 11. Are all two option (Boolean) fields set to a Flip-Switch style on the main form |

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| Problem / Opportunity Statement: | I would like to record details of Client Contacts and Candidates within the same reportable table, to ensure we can always utilise these records linked the same way across our database |
| Pain Points: | Business Rules do not allow for Interactions with Sections, resulting in all fields needing addition to a rule, furthermore, if a field is not displayed on a form, then the rule simply fails to run at all. Validation does not display missing fields when a rule is set to run only in the context of a form. |
| User Goals: | Store details relevant to a Contact or Candidate type person and only see data relevant to the record type. |
| Business Goals: | Ensure a clear demarcation of User Interface with regards to the two record types, while ensuring an easily reportable central database for all people we wish to communication with while leveraging the integrated features utilized in GDPR |
| Triggers: | Type (mlite\_type: Option Set)  Value set here results in UI display relevant to the chosen value  Permanent? (mlite\_ispermanent: Two Options)  Temporary? (mlite\_istemporary: Two Options)  Contractor? (mlite\_iscontractor: Two Options)  Values above will show/hide relevant pay interest details |
| Narrative Description (e.g., plans, evaluation, actions, objects, context, events): | Ensure a single table of all person entities regardless of interaction with the Recruitment Consultant, minimizing tables required to hold common data while ensuring a clean UI experience for data capture. Where possible the ‘Contact’ table should be utilized for requirements satisfied by out the box features, including but limited to email tracking and GDPR related contact prevention methods. |
| Detailed Steps | 1. ***New fields added to ‘Contact’*** 2. ***Business Rule added to Support Contact/Candidate or Both persona types*** 3. ***Fields configured to be made available or hidden by business rule in accordance with Persona Type*** 4. ***Business Rule added to Support mlite\_is[x] (Where x is employment type) fields shw/hide of Rate and Salary details for Candidate or Both persona types*** 5. ***Design views based on persona type to be utilized through system where lookup relationships (1:N) Contact:Other can be filtered based on relevant type*** 6. ***Design views for subgrids showing relevant Candidate or Contact information filtered based on type*** |
| Success Metrics: | 1. Are you able to record details of a Contact 2. Are you able to record details of a Candidate 3. Are you prevented from seeing Contact only details on a Candidate only record 4. Are you prevented from seeing Candidate only details on a Contact only record 5. When the Type is set to both can you see all details 6. Can you only see Salary Expectations when a Candidate is set to be interested in Permanent Positions 7. Can you only see Rate Expectations when a Candidate is set to be interested in both/either Temporary or Contract Positions 8. If a Working Here address is added, are you able to see but not edit details of the address 9. Are you only able to link a working here address in relation to the Client associated to the Contact. 10. Does the ‘As a Contact’ tab only link to records relevant to the persons role as a Client Contact, e.g Hiring Manger 11. Does the ‘As a Candidate’ tab only link to records relevant to the persons role as a Candidate 12. If you attempt to email a contact with their email setting set to ‘Do not Allow’ are you prevented from sending the email |

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| Problem / Opportunity Statement: | Provide unique identifier for the Vacancy and Placement routines. |
| Pain Points: | With a no-code approach, had to use standing data with increments then a copy back to numbered entity. This resulted in a limit of 9999 numbers (Due to workflow size) as well a further issue on the auo-number data facing locks when in use.  This would be resolved by extension of the auto-number routine available to standard entities. |
| User Goals: | Be able to find a record by unique indentifier. |
| Business Goals: | Ensure reportable/system generated reference is available for record relating to Client negotiations or jobs. |
| Triggers: | OnCreate of Vacacny or Placement, workflows called to generate unique identifier and add to record. |
| Narrative Description (e.g., plans, evaluation, actions, objects, context, events): | With a no-code approach, standing data at #1 with +1 increments on workflow, multiple stages needed to support consistent approach eg. 0001, 0010, 0100, 1000 where a stage is called based on current number to ensure the correct amount of 0s pre-fix the copied number. |
| Detailed Steps | 1. ***Create auto-number entity*** 2. ***Add identifier fields to Placement and Vacacny*** 3. ***Add workflows to increment standing data in auto-number and copy results to Vacancy*** 4. ***Add workflows to increment standing data in auto-number and copy results to Placement*** 5. ***Ensure workflows are triggered for Placements when they are extended.*** |
| Success Metrics: | 1. When created, does the Vacacny receive a unique ID 2. When created via workflow, does the Placement receive a unique ID 3. When you an extent a Placement via the Process Flow process, does it receive a unique ID |

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| Problem / Opportunity Statement: | I would like to record details of interactions, have the system automate some of these interactions, and have a way to a report on actions carried out by the system, so we can monitor targets and view trends over time within the system. |
| Pain Points: | None: manipulation of the out the box entities plus inclusion of auto-created audit entity for shortlist progression |
| User Goals: | Record interactions, time-stamp important movements, and have administrative time saved by system generated communication relevant to processing actions |
| Business Goals: | Allow for easy time based reporting, save time needed for carrying out administrative tasks for users. |
| Triggers: | Activities generated by multiple processes:  **Workflow:** Shortlist - Candidate and Send Email Out  **Actions:** Creates draft email to Candidate when ‘Selected’ through action on Shortlist BPF  **Workflow:** Shortlist - Send Candidate Interview Confirmation  **Actions:** Creates draft email if selected via yes/no option linked to Shortlist BPF  **Workflow:** Shortlist - Send Client Interview Confirmation  **Actions:** Creates draft email if selected via yes/no option linked to Shortlist BPF  **Workflows:** Shortlist - Update Status to Interview & Appointment  **Actions:** Triggers Appointment reminders in accordance with First/Further/Final dates set in Shortlist BPF |
| Narrative Description (e.g., plans, evaluation, actions, objects, context, events): | Ensure meaningful communication can be captured at any point when using the system, where appropriate workflows should be used to generate actions which can be sent on demand to the relevant contacts. |
| Detailed Steps | 1. ***Ensure all types (except email) have quick create forms*** 2. ***Ensure relevant lookups are associated to activities so they can be linked to all timeline enabled entities*** 3. ***Restrict existing entities from timelines, leaving just Task, Email, Phone Call, Appointment and Shortlist Update*** 4. ***Ensure Shortlist Updates are created programmatically at every step of the Shortlist progression routine*** 5. ***Ensure Appointments are created for interactions between a Contact/Candidate (Or where and/or are both)*** 6. ***Create relevant Draft emails at point of selection and progression through the Shortlist routine.*** |
| Success Metrics: | 1. Is a Shortlist Update created at every stage of a Shortlist during the progression stages of a BPF 2. Do all activity types have a quick create form available at all times in the UCI 3. Are all activity types created in reference to their parent entity when created from a timeline 4. Do all relevant activity types show on all timelines 5. Are all emails created automatically in a ‘Draft’ state 6. When a Phone Call is added via a Client Timeline, and set to a completed state, where direction is outbound, does the Last Contacted on the Client update with the Created By and Modified on of the Activity. 7. When a Phone Call is added via a Contact Timeline, and set to a completed state, where direction is outbound, does the Last Contacted on the Contact update with the Created By and Modified on of the Activity. 8. When an email is sent to a Conact, is the Last Contacted on the Contacted updated with the Created by and Modifed on of the email |

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| Configuration Settings | Client: Web Client (UCI) (Browsers: Chrome, Edge)  Mobile: UCI Forms |
| Problem / Opportunity Statement: | I would like to record details of Clients, so we an interact with and supply candidates to in order to generate revenue for our organization. |
| Pain Points: | No ability to link 1:1 with any entity and the address entity. As such, to accurately match a person to potentially any address of a client we had to duplicate the entity. This means we have to populate standard fields from our custom entity to utilise out the box maps features. |
| User Goals: | Store details relevant to a Client and ensure all relevant data can be linked and found easily from the one record. |
| Business Goals: | Allow for easy client level reporting based on GP and expected GP, while not overburdening the user interface with un-ncessary administration. |
| Triggers: | None, form as seen. |
| Narrative Description (e.g., plans, evaluation, actions, objects, context, events): | Ensure a connected database stemming from the Client entity, so business can be reported on and categorized by a well known business entity. |
| Detailed Steps | 1. ***New fields added to ‘Account’*** 2. ***Renamed to Client*** 3. ***Form designed to show relevant fields*** 4. ***Timeline updated to show relevant activities*** 5. ***Linked to Vacancies/Placements added to forms*** 6. ***Enabled for Quick Create*** 7. ***Designed quick create form with minimal fields.*** 8. ***Added Maps to form*** 9. ***Enabled maps for Organisation*** 10. ***Created Custom Address entity for links to other entities*** 11. ***Ensure Custom Address writes back to Client for maps delivery*** |
| Success Metrics: | 1. Are you able to record details of a Client 2. Are you able to associate Contacts directly to lookup fields on a Client 3. Can you deactivate a Client 4. Can you see linked Vacacnies on a Client 5. Can you see linked Placements on a Client 6. Can you see a Timeline against a Client 7. Are Client Contact interactions shown on this timeline 8. Can you see a list of Contacts based at the Client 9. Can you see a list of Candidates based at the Client 10. Are you able to record additional addresses against the Client 11. Are you able to see a Map against a Client record 12. If you add a new ‘Primary Address’ against the Client, does the map update to show this new location 13. If you add an ‘Other’ address to a Client, does this not cause an update to the map on the record. |