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Using the PAN System

**CREATING AN AUTOMATED ASSESSMENT  
PROCESS with WORKFLOWS**

Updated: April 12, 2017

# What is a “Workflow”?

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- A “Workflow” is a logical process in which an individual is taken step-by-step through a series of automated activities. Each activity includes rules which determine what the next activity in the process will be.

# Workflow: Additional Details

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- A Workflow may or may not include an assessment.
- Workflows can be copied and modified.
- ATS integration can be incorporated for some phases, depending upon the ATS provider and the client's needs.
- Like assessments, if changes are made to a Workflow and published, all candidates assigned after the "Publish" date will use the revised Workflow. Previously-assigned and in-process candidates will use the old version of the Workflow.
- The Workflow function is available to clients with either a Professional or Expert subscription.

# Important Reminder #1: Save



- Periodically click the “Save” icon as you are creating your Workflow.
  - This is simply a precautionary measure in case of a computer glitch or power loss.

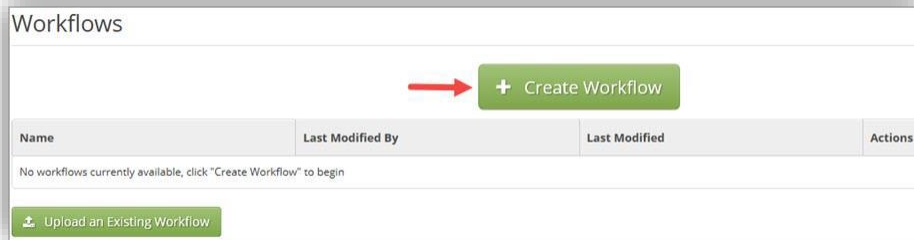
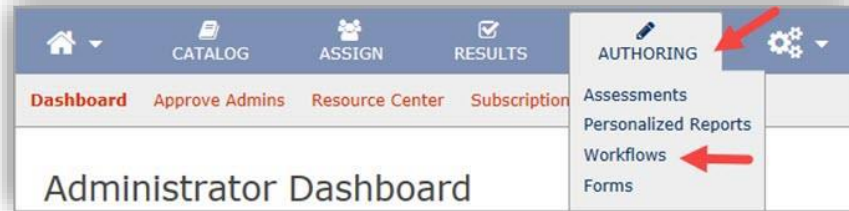


# Important Reminder #2: Validate

- You will also want to periodically click the “Validate” icon.
  - If there are any validation errors, they will be listed below the Workflow name.
  - Click on the validation error to open a screen where you can edit the section of the Workflow that is causing the validation problem.



# Creating a Workflow



1. Locate the "Authoring" tab and click "Workflows" in the dropdown list.
2. On the next screen, click "+ Create Workflow."

# Creating a Workflow



**Create Workflow**

From Scratch

Name

Example Workflow

*Required and must be unique.*

Description

This is my description for an example workflow.

*Required.*

Create Workflow

This screenshot shows the "Create Workflow" form. A red arrow points to the "From Scratch" radio button. Another red arrow points to the "Name" input field containing "Example Workflow". A third red arrow points to the "Description" text area containing "This is my description for an example workflow.". A final red arrow points to the "Create Workflow" button at the bottom right.

**Workflow**

Info Advanced

Workflow Name

Example Workflow

Workflow Description

This is my description for an example \

Workflow Completion Content

Format Font Size A B I U S x x

This screenshot shows the "Workflow" configuration page. A red arrow points to the "Advanced" tab. Another red arrow points to the "Workflow Completion Content" section, which includes a rich text editor toolbar with options for bold, italic, underline, and strikethrough.

3. Choose "From Scratch." Provide the "Name" and a "Description" and click "Create Workflow."
4. In the "Workflow Completion Content" area, input the text you want candidate's to see upon completion of your Workflow.

# Creating a Workflow



**Date Options**

**Workflow Completion Window**

12 : 00 AM EDT

to

11 : 59 PM EDT

or

**Completion Days from Assignment**

**Finish**

5. If desired, scroll down to set:
  - The beginning and end dates for completion of the Workflow, OR
  - The number of days allowed for completion, starting from the date of Assignment.

6. Click “Finish.”



7. On the main Workflow screen (shown on next slide), you will see all of the available “Activities” that can be used in your Workflow.
  - As you click on each Activity, you will be presented with a screen where you will provide the necessary information for that Activity to function properly.
  - For each Activity, when you click “Finish” a box with the “Activity Name” will post to the Workflow canvas.

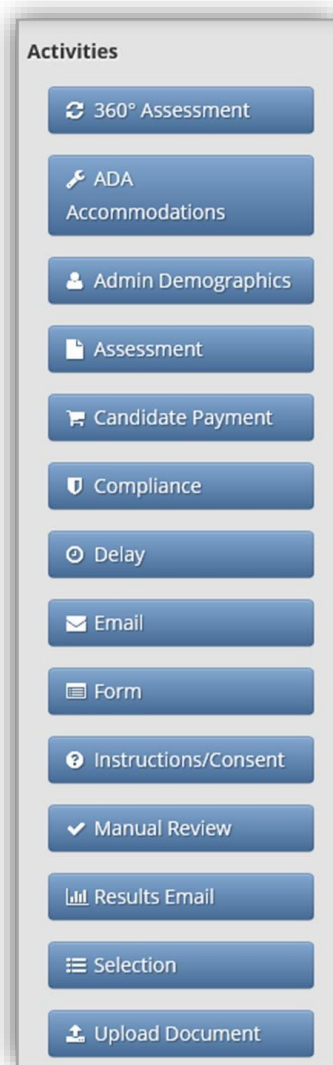
# Workflow: Main Screen



- This is the Workflow canvas – the area where icons with your “Activity Name” will display.
- As you add “Rules,” the Workflow takes shape, with arrows showing the logical progression from one activity to another.

The screenshot displays the 'Workflow: Main Screen' interface. On the left, there is a vertical sidebar titled 'Activities' with a red arrow pointing to it. This sidebar contains a list of activity buttons: '360° Assessment', 'ADA Accommodations', 'Admin Demographics', 'Assessment', 'Candidate Payment', 'Compliance', 'Delay', 'Email', 'Form', 'Instructions/Consent', 'Manual Review', 'Results Email', 'Selection', and 'Upload Document'. At the bottom of the sidebar is a link 'Learn about Activities'. The main area is titled 'Example Workflow' and has a 'Workflow Settings' button in the top right corner, also indicated by a red arrow. Below the title, there are two tabs: 'Designer' and 'Activity Sequence', with a red arrow pointing to the 'Activity Sequence' tab. The central workspace is currently empty, representing the workflow canvas.

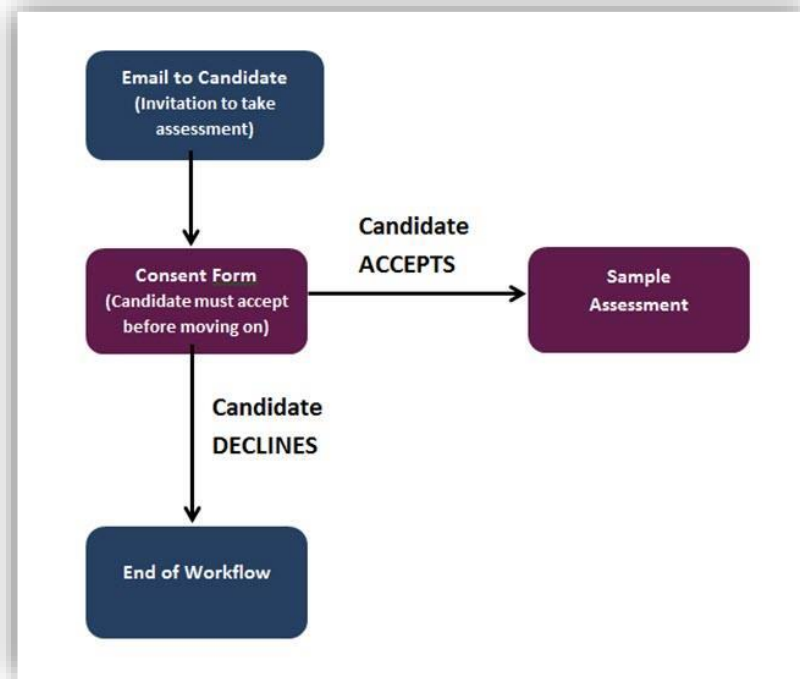
# Workflow: Activities



–The 14 “Activities” are listed at right.

–Slides with the input screens and a brief description of each Activity can be found here: “Workflows: Activity Descriptions”

# Creating a Workflow



8. We're now ready to add "Activities" to the canvas. We'll create a simple Workflow, as shown here.

# Creating a Workflow

The screenshot shows a web-based configuration interface for creating an email activity. The interface is titled "Email" in a dark blue header. It is divided into two main columns: "Activity Name" and "Activity Description".  
- **Activity Name:** A text box containing "Assessment Invitation Email".  
- **Activity Description:** A larger text box also containing "Assessment Invitation Email".  
- **Candidate Display Name:** A text box containing "Assessment Invitation Email".  
- **Display Options:** A section with a checked checkbox labeled "Display to Candidates".  
- **Email Options:** A section with several fields, each with an "Insert Token" button:  
 - **To Address:** Contains "%%TesterEmail%%".  
 - **CC Address:** An empty field.  
 - **BCC Address:** An empty field.  
 - **From Address:** Contains "%%AdminEmail%%".  
 - **Email Subject:** Contains "Invitation to Take Assessment".  
- **Email Body:** A rich text editor with a toolbar (including icons for bold, italic, underline, link, unlink, and source) and a text area containing:  
 - "Dear %%TesterName%%,"  
 - "Thank you for your interest in employment with Acme Corporation."  
 - "As part of the selection process for the position of Customer Service Supervisor, we require that all candidates"

- From the left column, click "Email."  
–Provide the requested information.  
–Click "Finish" in the lower right corner of the screen.

# Creating a Workflow



The screenshot shows a web-based configuration interface for creating a workflow activity. The main heading is "Instructions/Consent". Below this, there are four tabs: "Activity", "Facts", "Rules", and "Advanced", with "Activity" currently selected. The interface is divided into several sections:

- Activity Name:** A text input field containing "Consent Form".
- Activity Description:** A larger text area containing "Consent Form - requires agreement in order to proceed to the next step."
- Candidate Display Name:** A text input field containing "Consent Form".
- Display Options:** A section with a checked checkbox labeled "Display to Candidates".
- Content:** A rich text editor area. It includes a toolbar with icons for undo, redo, bold, italic, underline, strikethrough, link, unlink, bulleted list, numbered list, indent, outdent, link, unlink, search, and source. Below the toolbar, the content area contains the following text:

As part of the company's selection process, we require candidates to take one or more assessments.

Assessment results will be used in conjunction with other criteria to determine whether a candidate moves forward in the process.

Indicate your understanding and agreement to the above by selecting "Yes."

If you do not agree, select "No."
- Show Yes/No:** A dropdown menu at the bottom left, currently set to "Yes".

10. Click "Instructions/Consent Form."
  - Provide the requested information.
  - Click "Finish."

# Creating a Workflow



**Assessment**

Activity    Advanced

**Activity Name**  
Assessment

**Activity Description**  
Assessment

**Candidate Display Name**  
Assessment

**Display Options**  
 Display to Candidates

**Assessment**  
16PF® Fifth Edition Questionnaire: Cor

**Selected Product**  
16PF® Fifth Edition Questionnaire: Comprehensive Insights Report  
• 16PF® Fifth Edition Questionnaire (English)  
• 16PF® Questionnaire: Comprehensive Insights Report

**Validity Period ⓘ**  
**Validity Days**  
[Empty field]

**Date Options**  
**Activity Completion Window**  
06/01/2017 [Calendar] 12 [Dropdown] : 00 [Dropdown] AM [Dropdown] EDT  
to  
06/15/2017 [Calendar] 11 [Dropdown] : 59 [Dropdown] PM [Dropdown] EDT

**Delivery Options**  
Text Shown to Administrator While Pending Candidate Action

11. Click  
“Assessment.”  
–Provide the requested information.  
–Click “Finish.”

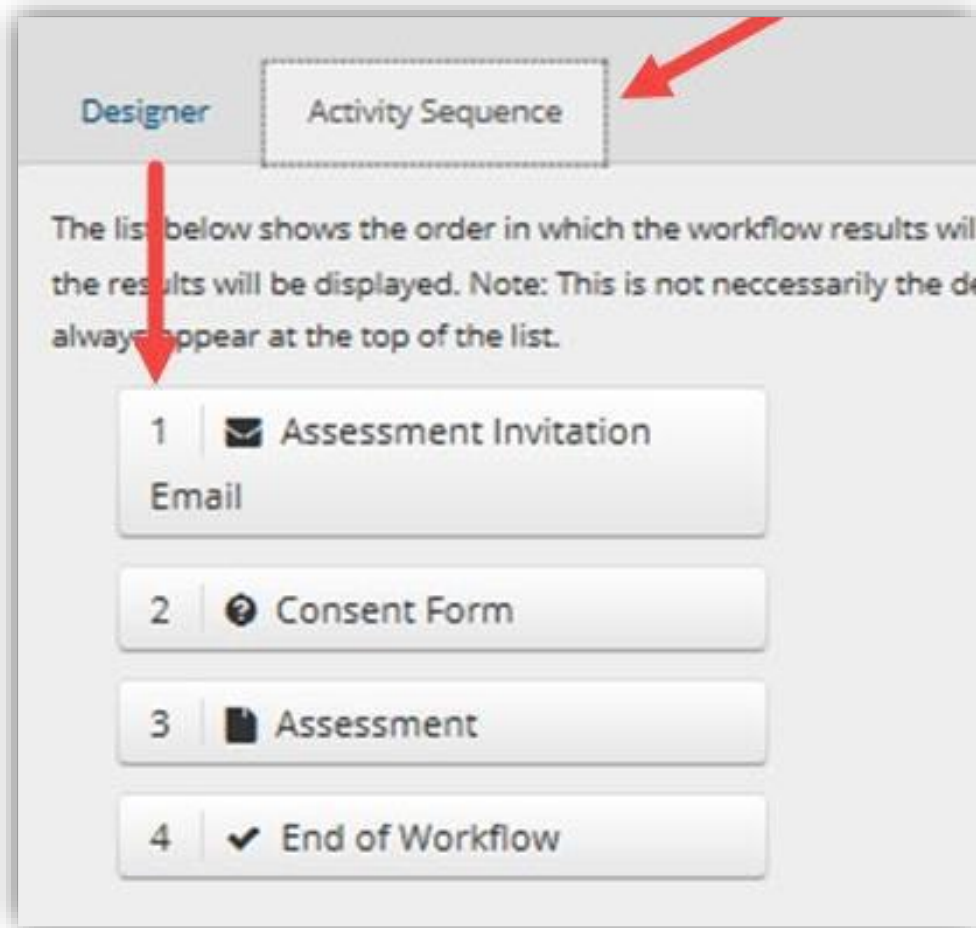
# Creating a Workflow

The screenshot shows a web-based interface for configuring a workflow activity. At the top, there is a dark blue header with the text "Manual Review". Below this, there are two tabs: "Activity" (selected) and "Advanced". The main content area is divided into several sections: "Activity Name" with a text input field containing "End of Workflow"; "Activity Description" with a larger text area containing "End of Workflow"; "Candidate Display Name" with a text input field containing "Application Terminated"; "Display Options" with a checked checkbox labeled "Display to Candidates"; "Content" with a rich text editor toolbar and a text area containing "The candidate did not accept the terms of the Consent Form. Application terminated."; "Statuses" with a table containing one row: "End of Workflow - Application Terminated" in the "Status" column and an empty checkbox in the "Select" column; and "Date Options" at the bottom. At the bottom right of the form, there are two buttons: "Add Status" and "Delete Selected".

12. Click “Manual Review” to create an Activity that terminates the Workflow.
  - Provide the requested information.
  - Click “Finish.”

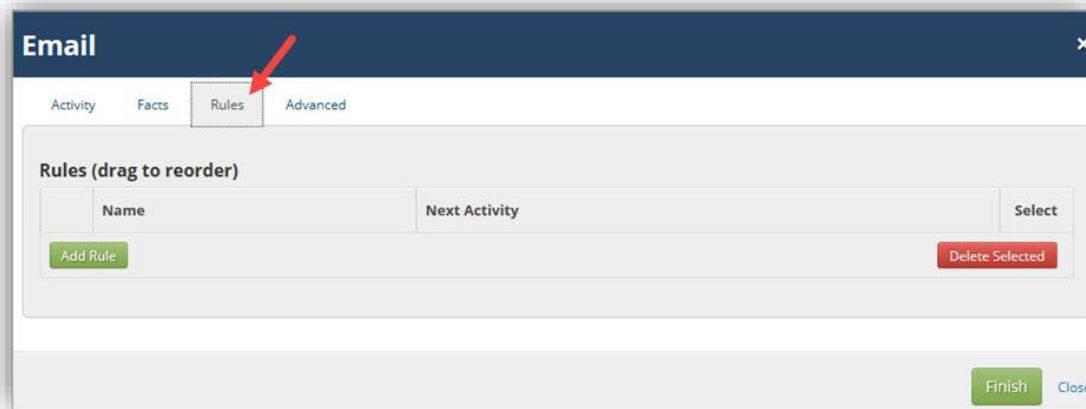


# Creating a Workflow



12. Once all "Activities" are specified, click the "Activity Sequence" tab.
  - Drag and drop Activities to arrange the order that the Workflow results will be displayed.
  - This is NOT necessarily the delivery sequence of the Workflow.

# Creating a Workflow



Next, we will create the Rules for moving from one Activity to another.

14. On the first Activity ("Assessment Invitation Email"), click the pencil icon to open the editing screen.
15. Then click the "Rules" tab.

# Creating a Workflow



**Email**

Activity Facts **Rules** Advanced

Rules (drag to reorder)

Name	Next Activity	Select
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**Add Rule** **Delete Selected**

**Rule**

**Rule Name**  
Click to Launch Consent Form/Assesst

**Rule Description**  
Link sends all candidates to the Consent Form.

**From Activity**  
Assessment Invitation Email →

**To Activity**  
Consent Form

**Condition**

**Define Condition**

**Result Status**

**Finish**

16. Next, click the “Add Rule” button.

–Provide a “Rule Name” and “Rule Description.”

–Select the “To Activity” from the dropdown list. (In this example, select “Consent Form.”)

–See note in image regarding “Condition.”

–Click “Finish.”

In this example, a “Condition” is not needed when going from “Assessment Invite Email” to “Consent Form” as everyone who clicks on the link in the Email will be taken to the Consent Form.

# Creating a Workflow



-On the Workflow main screen, you will see that the “Rule” is now in place between the two Activities.

We now need to create a “Rule” for the “Consent Form” Activity.

17. Click the pencil icon on the “Consent Form” Activity to open the editing screen.
18. Click the “Rules” tab.
19. Click the “Add Rule” button.

# Creating a Workflow



The screenshot shows a web interface for creating a workflow rule. The title is "Rule".

- Rule Name:** A text input field containing "Consent Declined". A red arrow points to this field.
- Rule Description:** A text input field containing "Candidate declined the Consent Form". A red arrow points to this field.
- From Activity:** A dropdown menu showing "Consent Form". A black arrow points to the right of this field.
- Condition:** A large, empty text area.
- Define Condition:** A blue button with white text. A red arrow points to this button.
- Result Status:** A text input field at the bottom.

A dropdown menu is open, showing the following options: "--Not Selected--", "Assessment Invitation Email", "Consent Form", "Assessment", and "End of Workflow". The "End of Workflow" option is highlighted in blue. A red arrow points to this option.

–Provide a “Rule Name” and “Rule Description.”

–From the “To Activity” dropdown list, select “End of Workflow.”

–Click the “Define Condition” button.

# Creating a Workflow



Variable Name	Values
Accepted	Values

Variable Name	Values
Accepted	Values

20. Under “Variables,” click “Accepted” to populate the first part of the “Condition.”
  - Then, from the “Operators” section, select “=”
  - Click the “Values” button and select “No” from the drop- down list.

# Creating a Workflow



- –This “Condition” is now complete. The Workflow will terminate for Candidates who select “No” on the “Consent Form.”
- –Click “Finish” to go back to the “Rules” screen.
- –Click “Add Rule” to add a second “Rule” for the “Consent Form.”

A screenshot of a software interface titled "Instructions/Consent". The interface has a dark blue header with the title and a right-pointing arrow. Below the header are four tabs: "Activity", "Facts", "Rules", and "Advanced". The "Rules" tab is selected. Underneath the tabs, there is a section titled "Rules (drag to reorder)". This section contains a table with the following columns: "Name", "Next Activity", and "Select". There is one row in the table with the following data: "Consent Declined" (with a blue edit icon), "End of Workflow", and an empty checkbox. Below the table, there is a green "Add Rule" button on the left and a red "Delete Selected" button on the right. Two red arrows are overlaid on the screenshot: one points to the "Add Rule" button, and the other points to the "Consent Declined" entry in the table.



# Creating a Workflow



The screenshot shows the 'Instructions/Consent' workflow configuration page. At the top, there are tabs for 'Activity', 'Facts', 'Rules', and 'Advanced'. Below the tabs is a table titled 'Rules (drag to reorder)'. The table has three columns: 'Name', 'Next Activity', and 'Select'. There is one row with the following data: '1' in the first column, 'Consent Declined' in the second, and 'End of Workflow' in the third. Below the table, there is a green 'Add Rule' button on the left and a red 'Delete Selected' button on the right. Red arrows point to the 'Add Rule' button and the 'Consent Declined' text in the table.

Name	Next Activity	Select
1 Consent Declined	End of Workflow	<input type="checkbox"/>

The screenshot shows the 'Rule' configuration form. It has several sections: 'Rule Name' with a text input field containing 'Consent Accepted'; 'Rule Description' with a text area containing 'Candidates who Accept the Consent Form will progress to the Assessment'; 'From Activity' with a dropdown menu showing 'Consent Form'; 'To Activity' with a dropdown menu showing 'Assessment'; 'Condition' with a large empty text area; 'Edit Condition' with a blue button; and 'Result Status' with an empty text input field. Red arrows point to the 'Rule Name' field, the 'Rule Description' text area, the 'Assessment' dropdown menu, and the 'Edit Condition' button.

21. Click “Add Rule” to add a second “Rule” for the “Consent Form.”

–Provide a “Rule Name” and “Rule Description.”

–In the “To Activity” dropdown, select “Assessment.”


–Click “Edit Condition.”

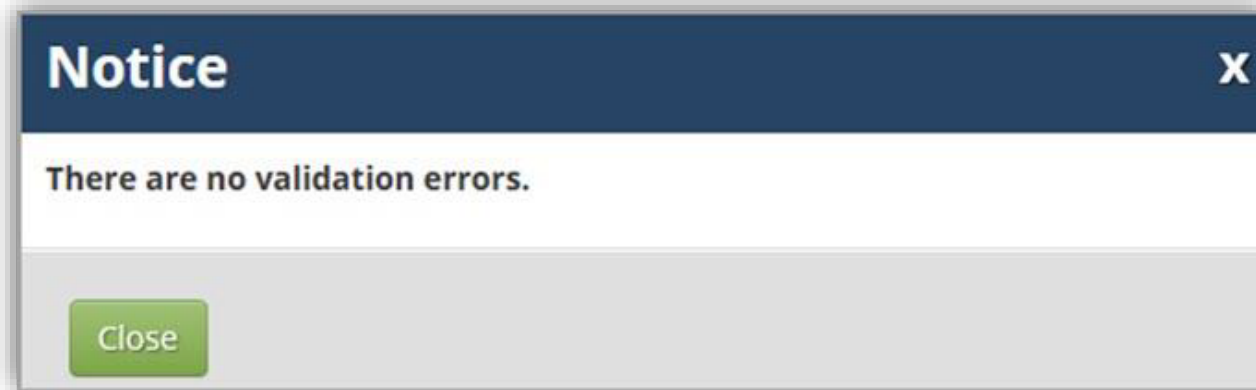
# Creating a Workflow



- Under “Variables,” click “Accepted.”
- Click “=” in the “Operators” section.
- Click the “Values” button and select “Yes.”
- Click “Finish” on the “Condition Editor” screen.
- Click “Finish” on the “Rule” screen.
- Click “Finish” on the “Instructions/Consent” screen.
- Click the “Save” icon in the upper right corner of the screen.



22. The next step is to validate the Workflow.
- Click the “Validate” icon (check mark) in the upper right corner of the screen. 
  - If any validation errors exist, they will be itemized for you in a pop-up screen.
  - If no errors exist, you will see the following screen.



23. The last step is to test the Workflow to see if it is working properly. To do this:

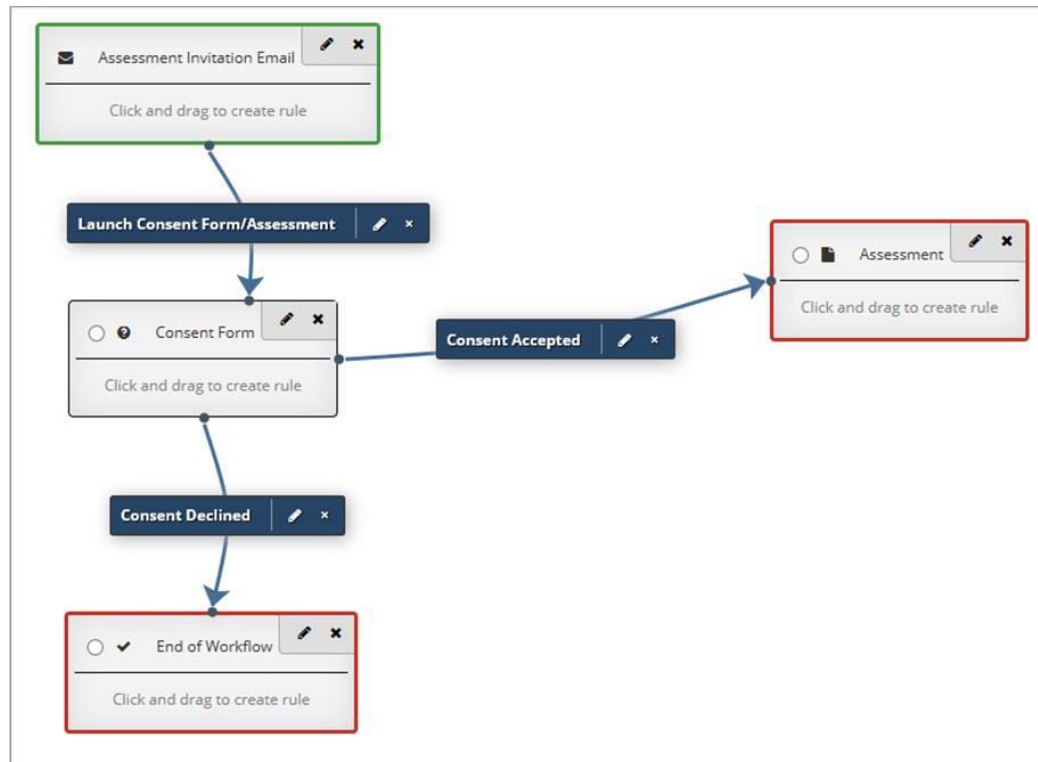
- Assign the Workflow to several test Candidates
- Respond to the queries in different ways, to thoroughly test the Workflow functionality. For example, respond “Yes” to the Consent Form as Candidate A and respond “No” as Candidate B.
- Make adjustments as needed, then “Save.”

# Creating a Workflow



24. When you are 100% satisfied with the Workflow, click “Publish” in the upper right corner of your screen.

25. Our example of a simple Workflow is complete (see next slide), with all Activities, Rules, and Conditions specified.





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Using the PAN System

CREATING AN AUTOMATED ASSESSMENT PROCESS with WORKFLOWS

# QUESTIONS?

## Contact Your PAN Account Representative