Using the PAN System

CREATING AN AUTOMATED ASSESSMENT PROCESS with WORKFLOWS

Updated: April 12, 2017

What is a “Workflow”?

- 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

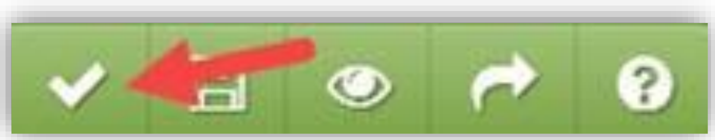
- A Workflow may or may not include an assessment.
- Workflows can be copied and modified.
- ATS integration can be incorporated for some phases, depending upon the ATS provider and the client's needs.
- Like assessments, if changes are made to a Workflow and published, all candidates assigned after 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

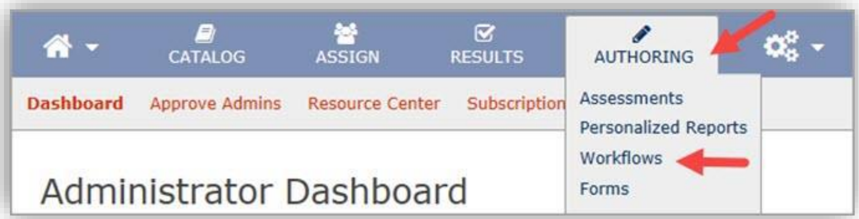
- Periodically click the “Save” icon as you are creating your Workflow.
  - –This is simply a precautionary measure in case of a computer glitch or power loss.

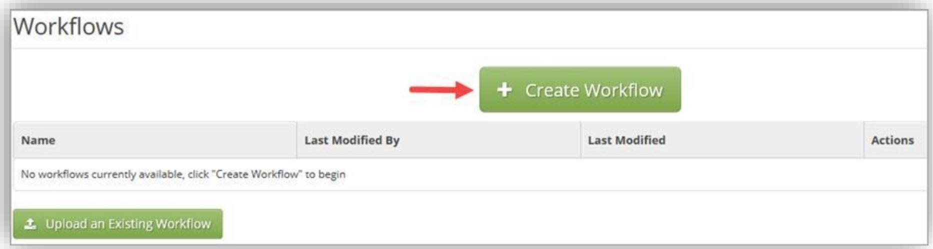
Important Reminder #2: Validate

- 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.



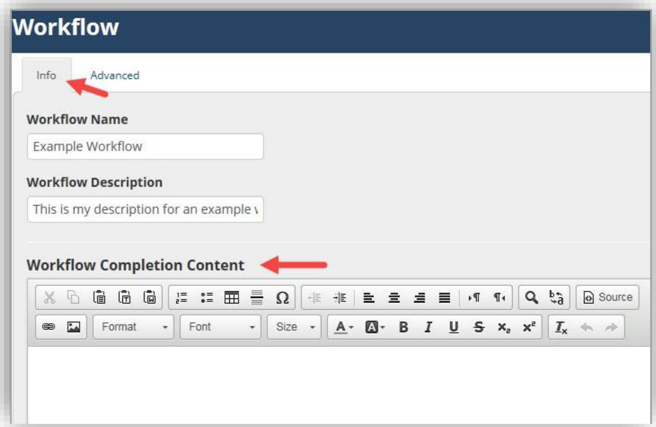
Creating a Workflow





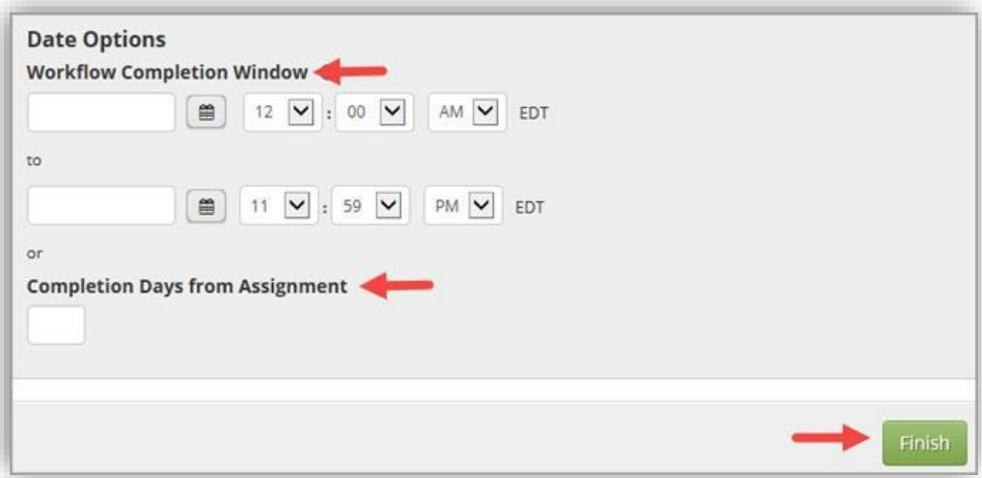
1. Locate the "Authoring" tab and click "Workflows" in the dropdown list.
2. On the next screen, click "+ Create Workflow."

Creating a Workflow



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



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."

Creating a Workflow

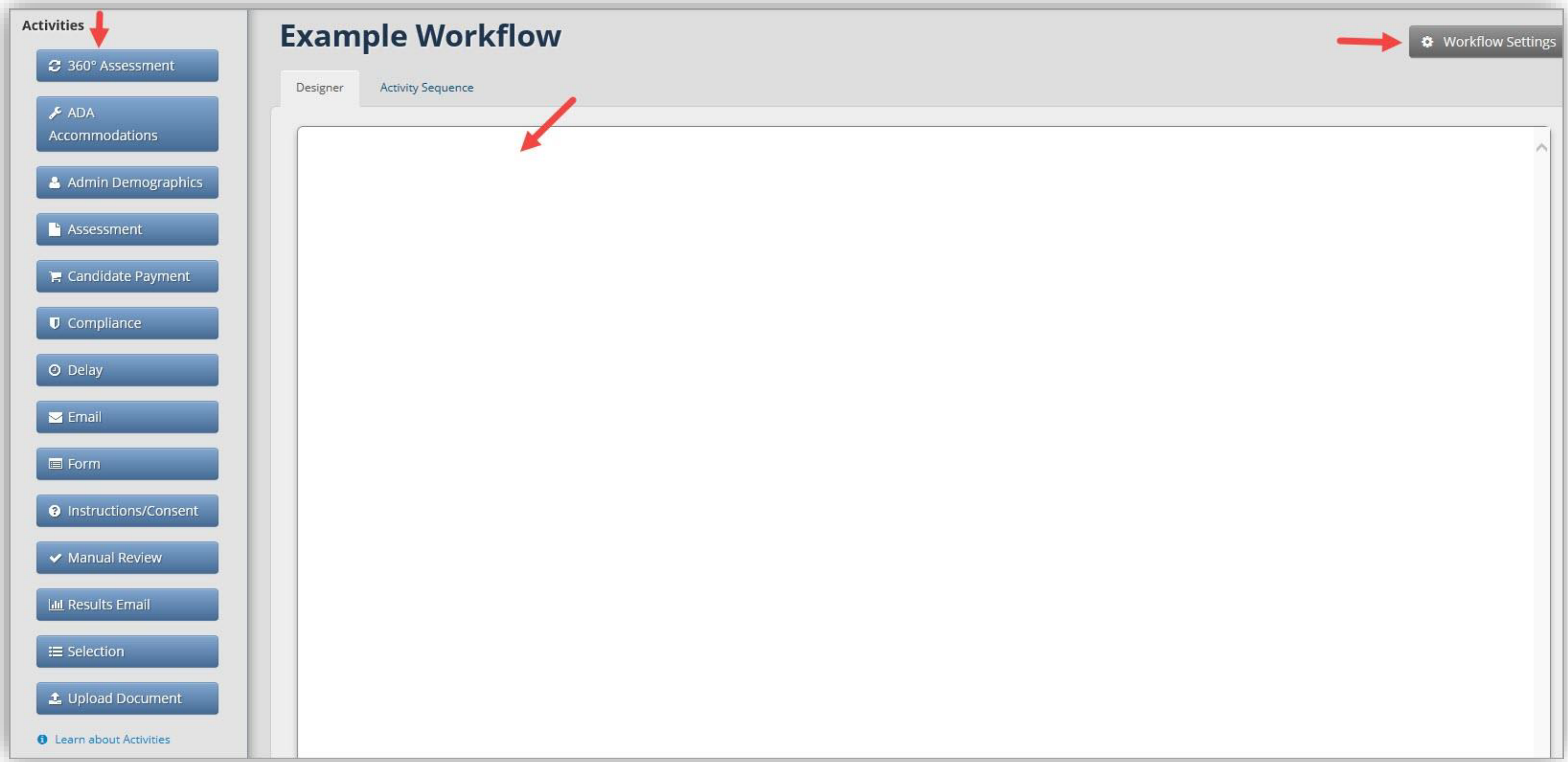
7. On the main Workflow screen (shown on next slide), you will see all of the available “Activities” that can be used in your Workflow.

–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.

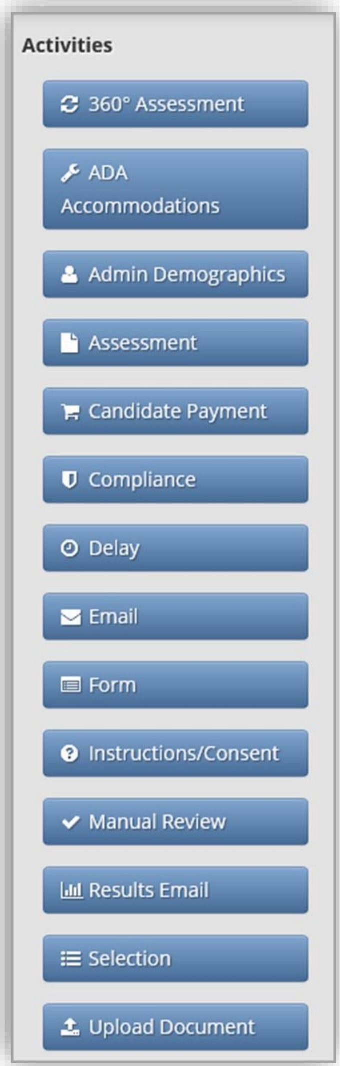
–For each Activity, when you click “Finish” a box with the “Activity Name” will post to the Workflow canvas.

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.



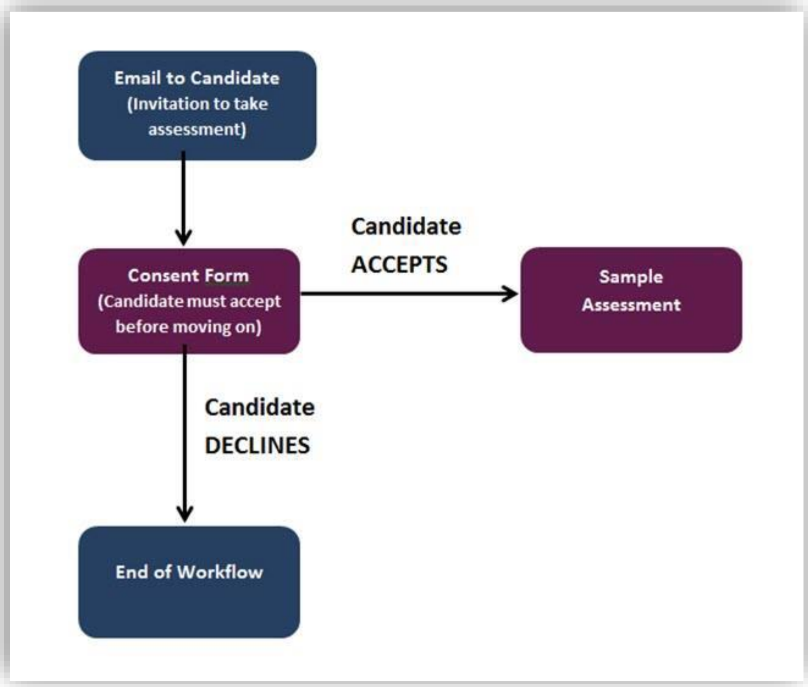
Workflow: Activities



– The 14 "Activities" are listed at right.

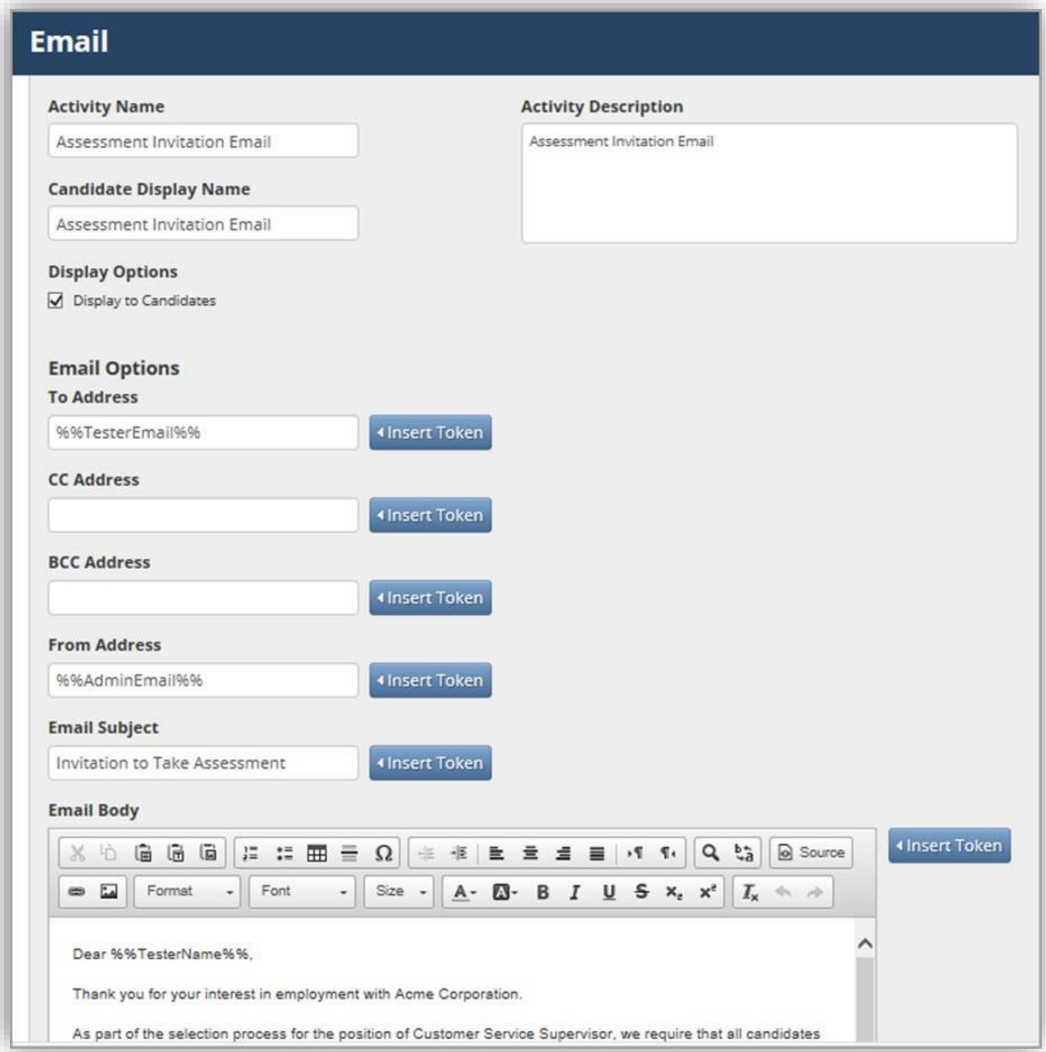
– Slides with the input screens and a brief description of each Activity can be found here: "Workflows: Activity Descriptions"

Creating a Workflow



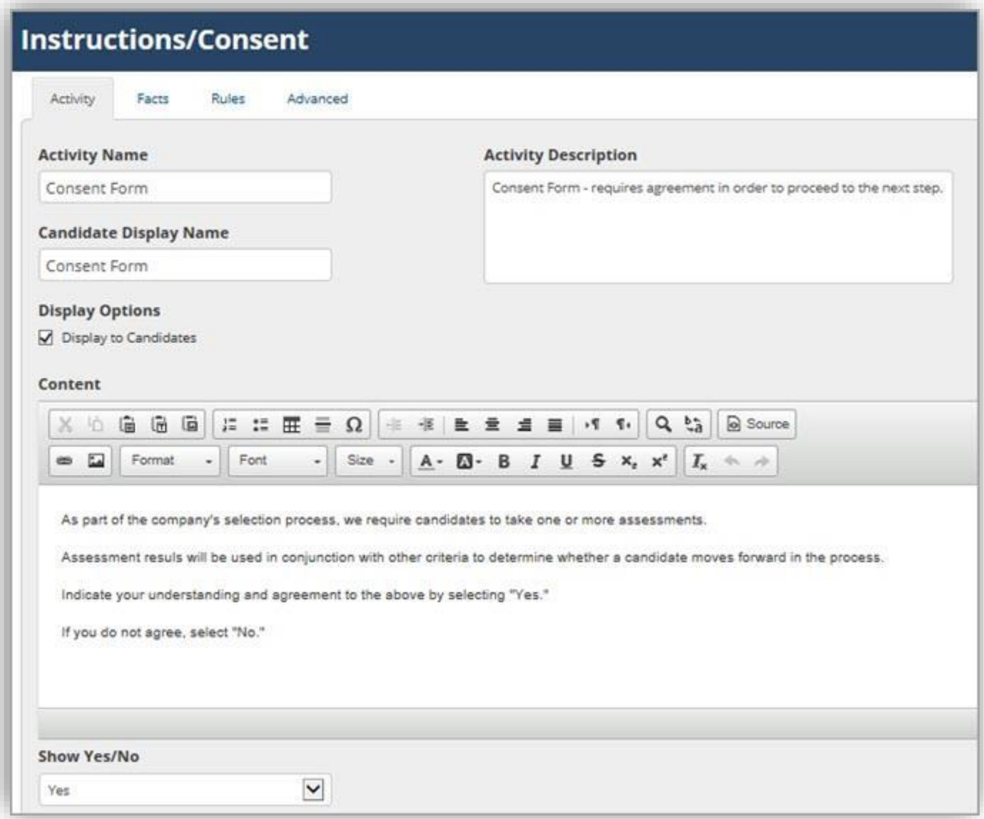
8. We're now ready to add "Activities" to the canvas. We'll create a simple Workflow, as shown here.

Creating a Workflow



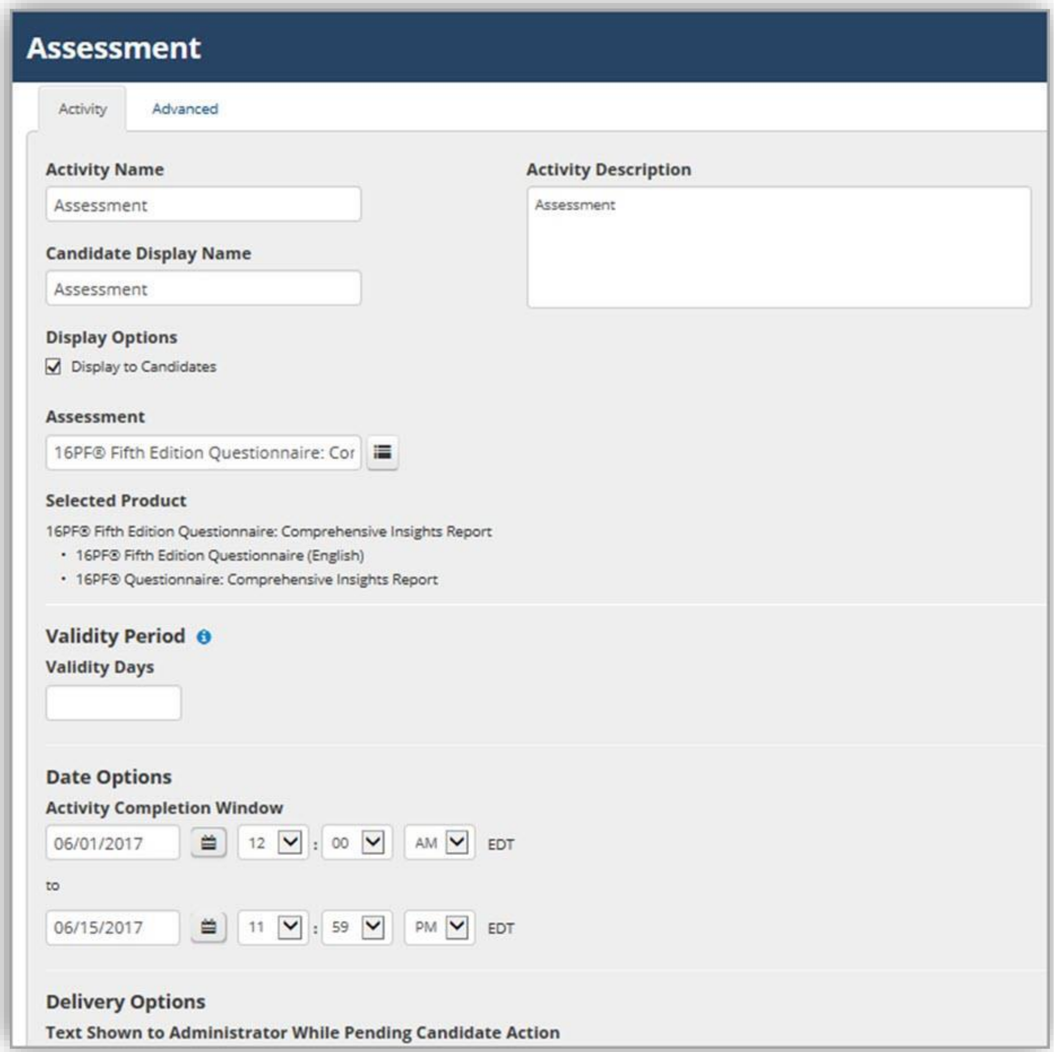
9. From the left column, click “Email.”
   - –Provide the requested information.
   - –Click “Finish” in the lower right corner of the screen.

Creating a Workflow



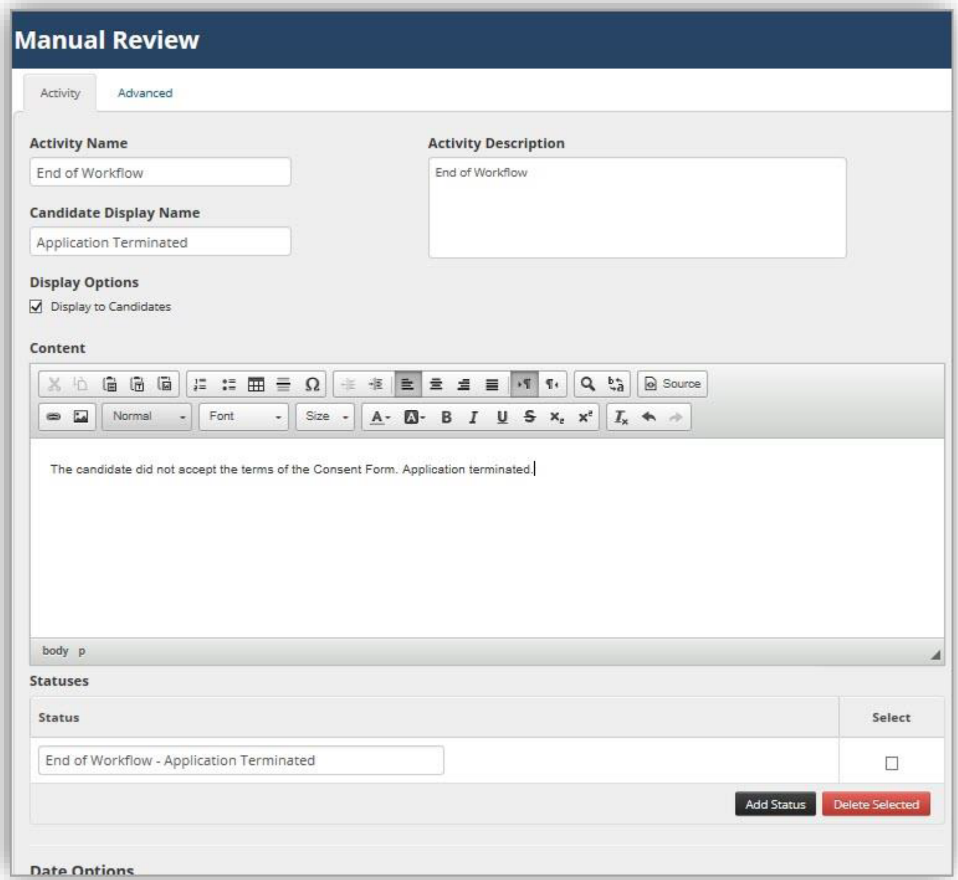
10. Click "Instructions/ Consent Form."
    – Provide the requested information.
    – Click "Finish."

Creating a Workflow



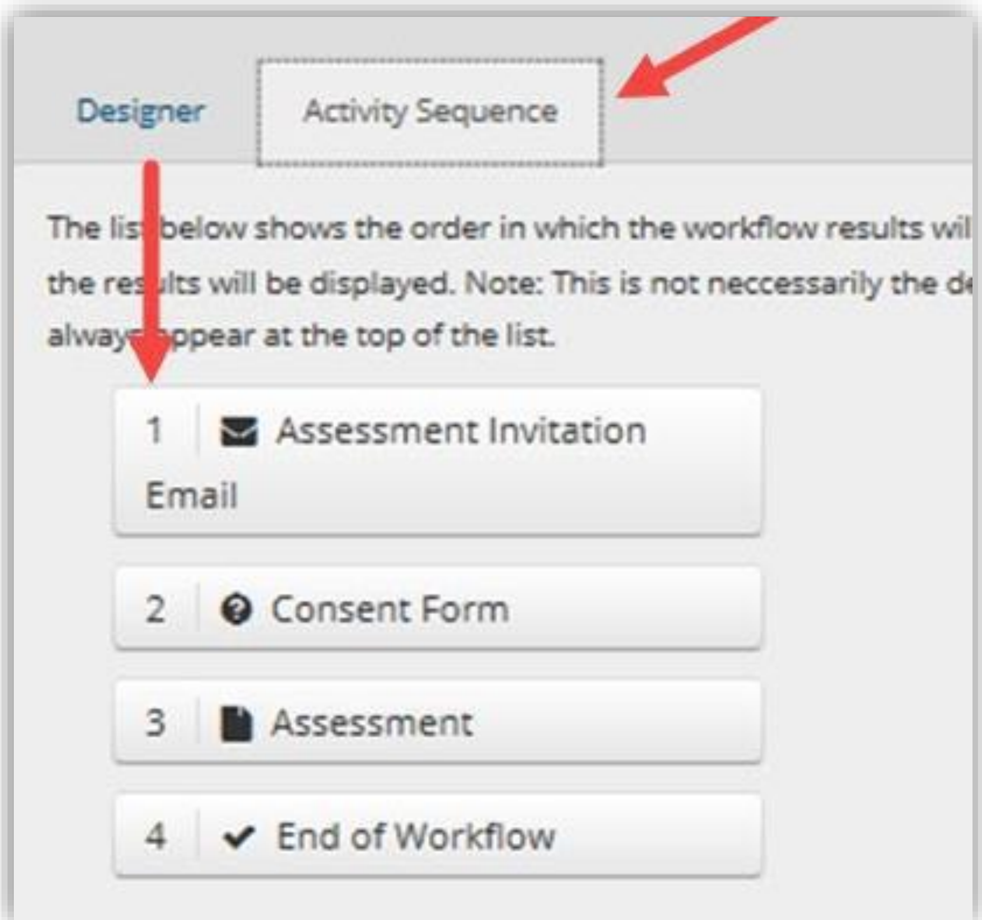
11. Click "Assessment."
   - Provide the requested information.
   - Click "Finish."

Creating a Workflow



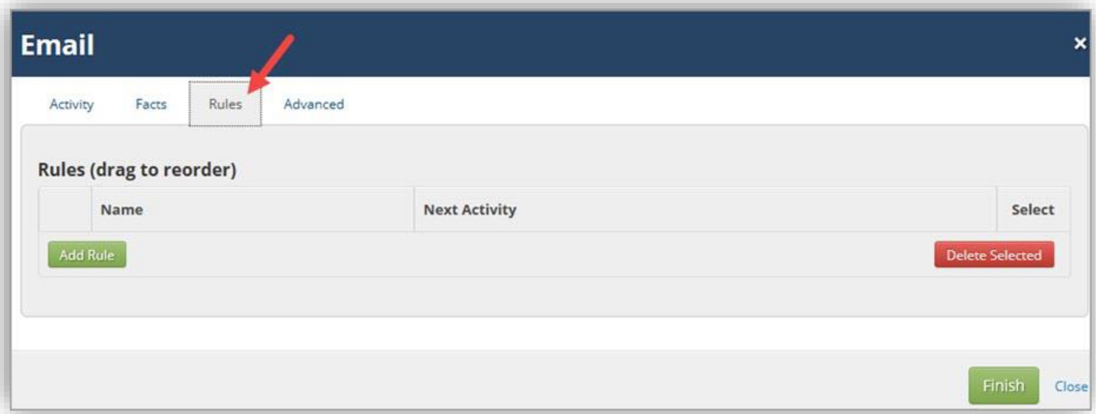
12. Click "Manual Review" to create an Activity that terminates the Workflow.
    - –Provide the requested information.
    - –Click "Finish."

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.

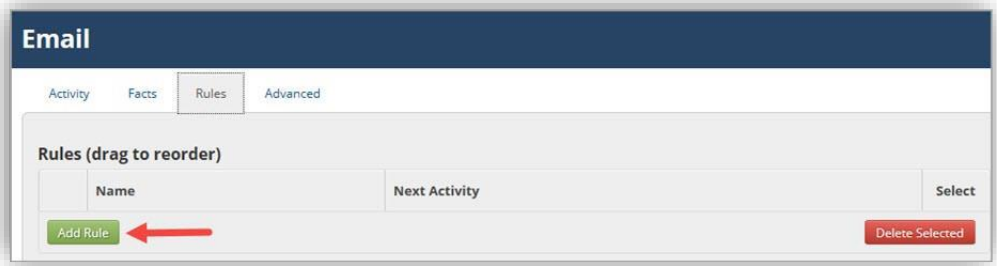
Creating a Workflow

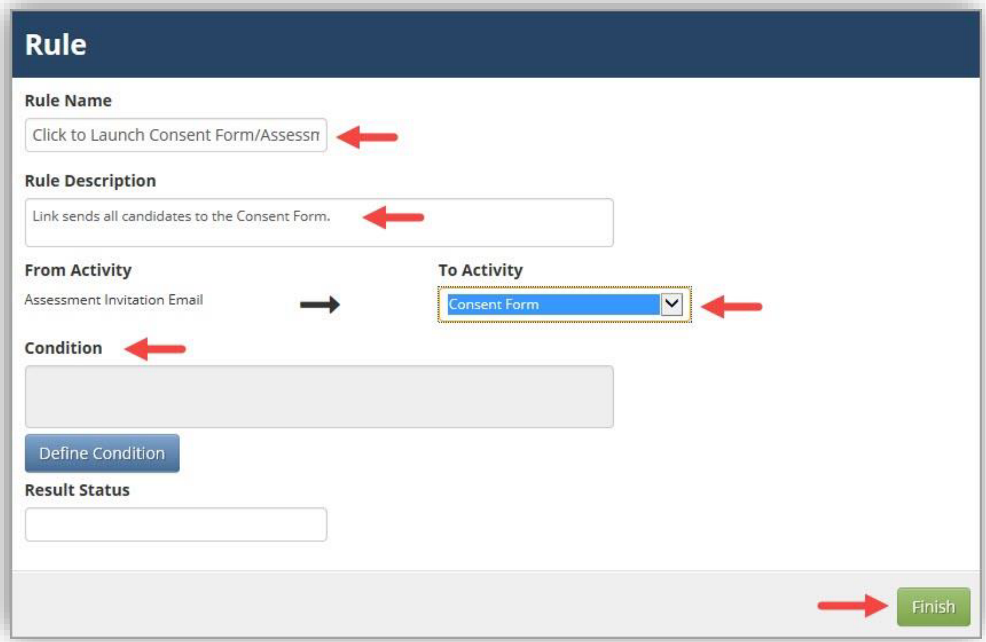


Next, we will create the Rules for moving from one Activity to another.

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





16. Next, click the "Add Rule" button.

–Provide a "Rule Name" and "Rule Description."

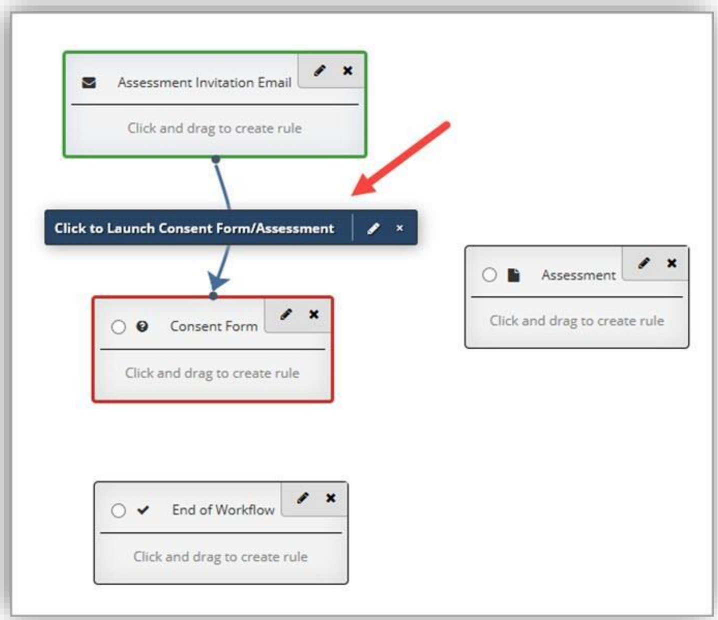
–Select the "To Activity" from the dropdown list. (In this example, select "Consent Form.")

–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



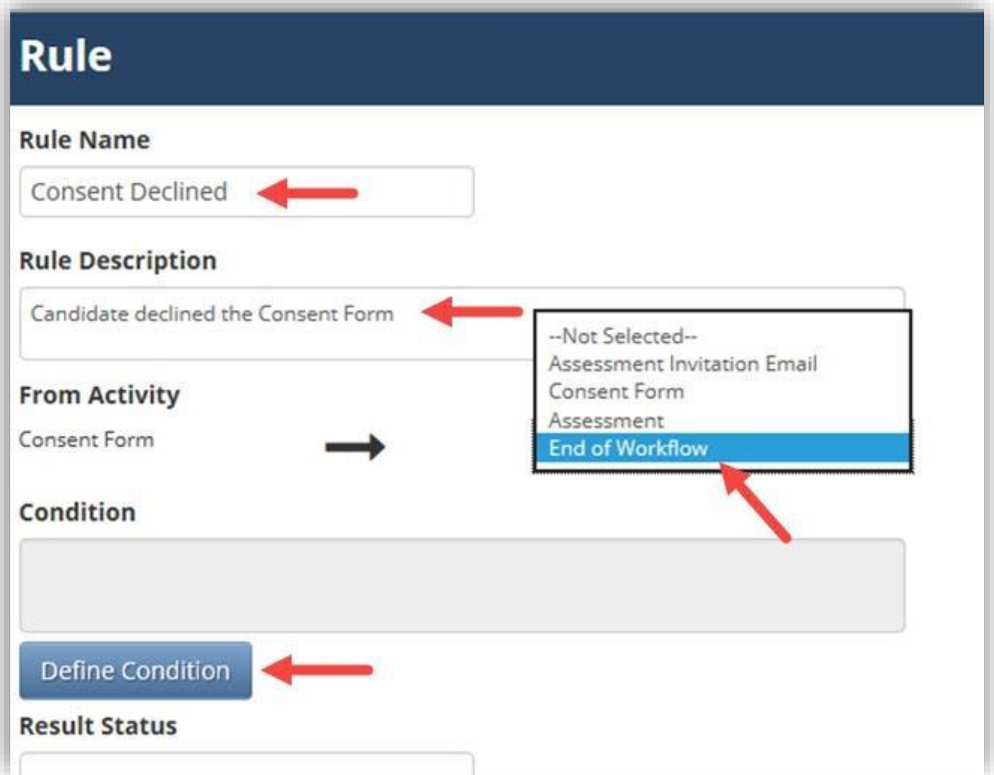
–On the Workflow main screen, you will see that the “Rule” is now in place between the two Activities.

Creating a Workflow

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

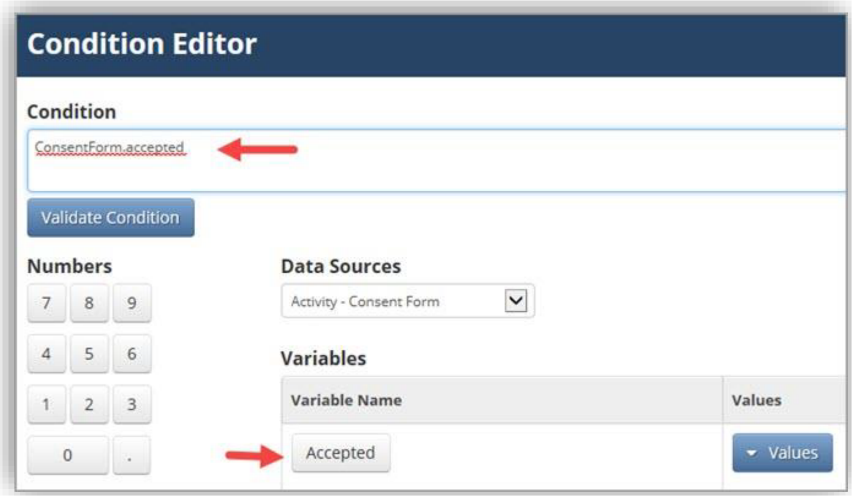
17. Click the pencil icon on the “Consent Form” Activity to open the editing screen.
18. Click the “Rules” tab.
19. Click the “Add Rule” button.

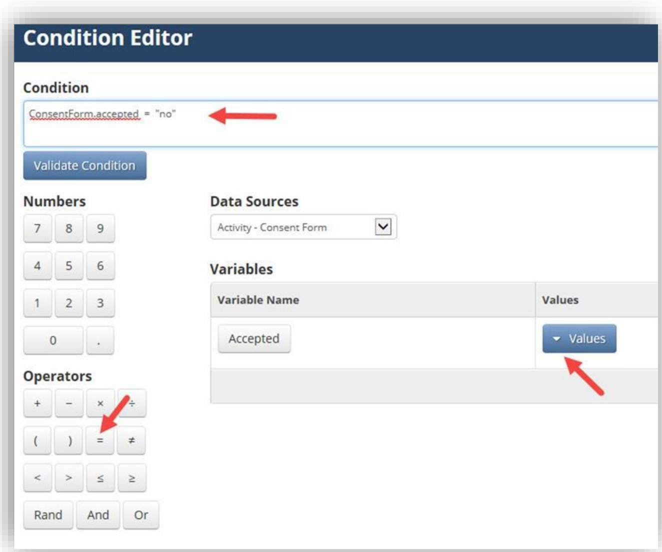
Creating a Workflow



- 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

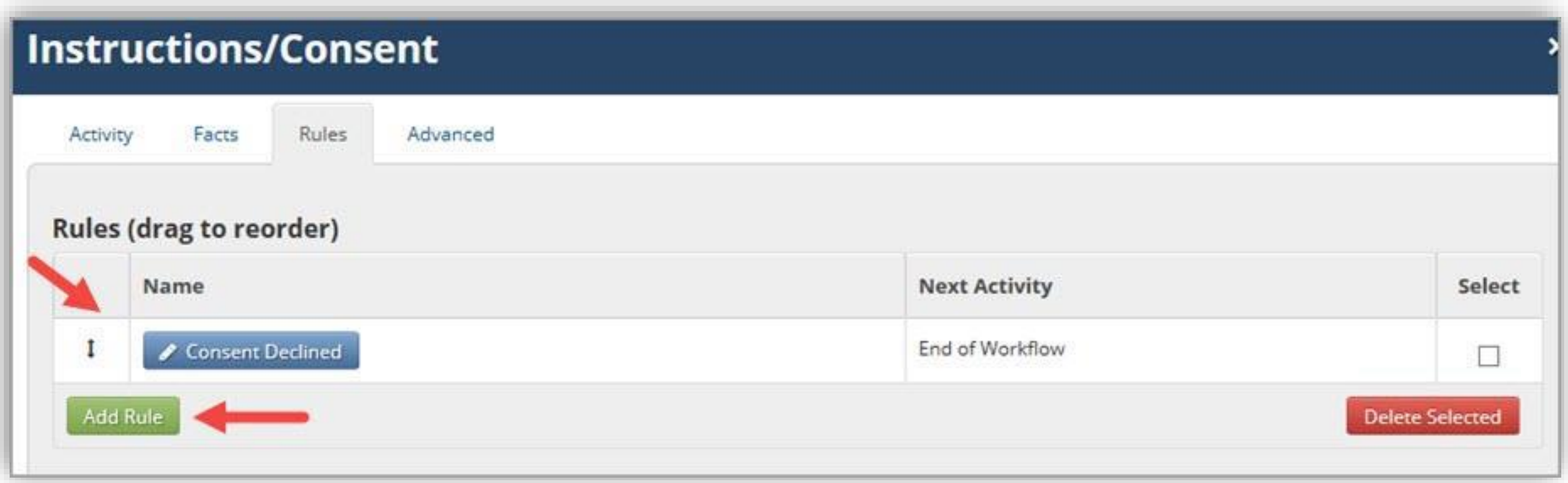




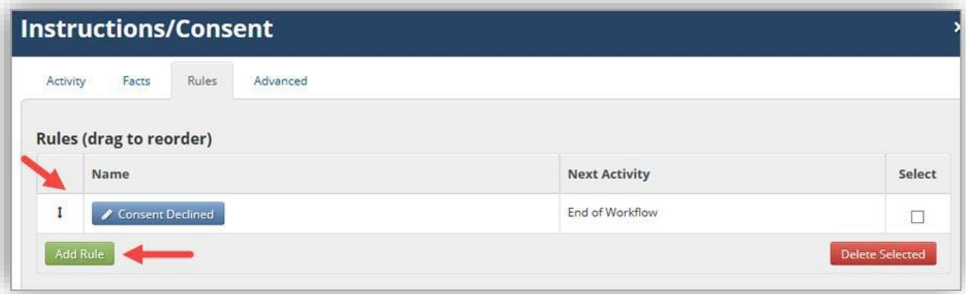
20. Under "Variables," click "Accepted" to populate the first part of the "Condition."
    - –Then, from the "Operators" section, select "="
    - –Click the "Values" button and select "No" from the drop- down list.

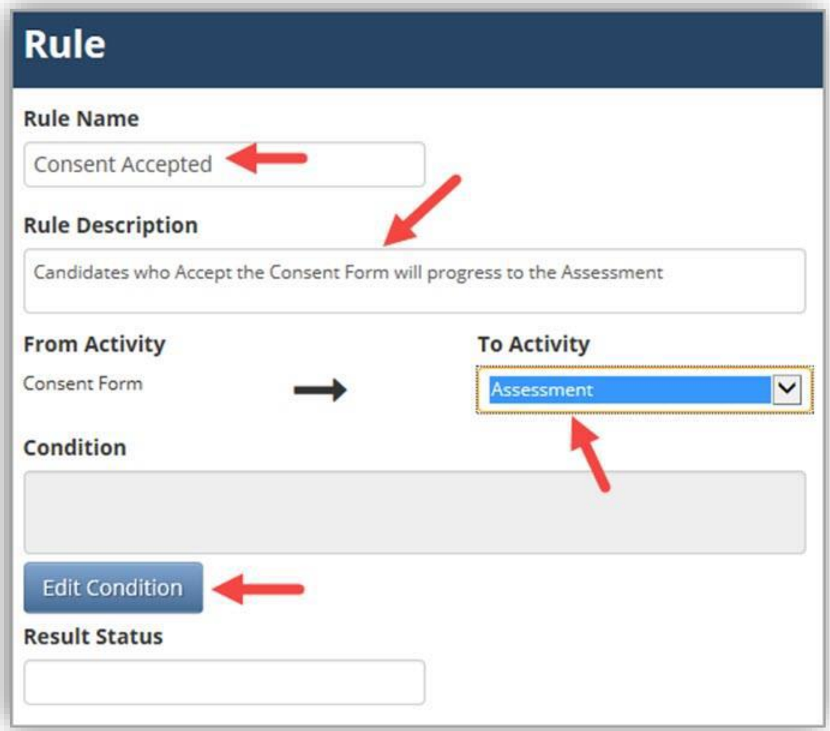
Creating a Workflow

- –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.”



Creating a Workflow





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.

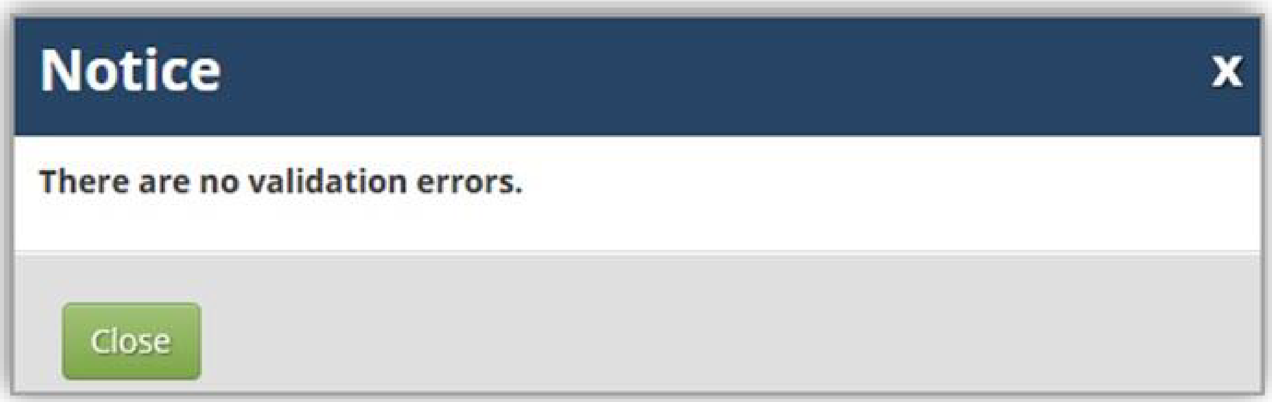
–Click the "Save" icon in the upper right corner of the screen.

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.



Creating a Workflow

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

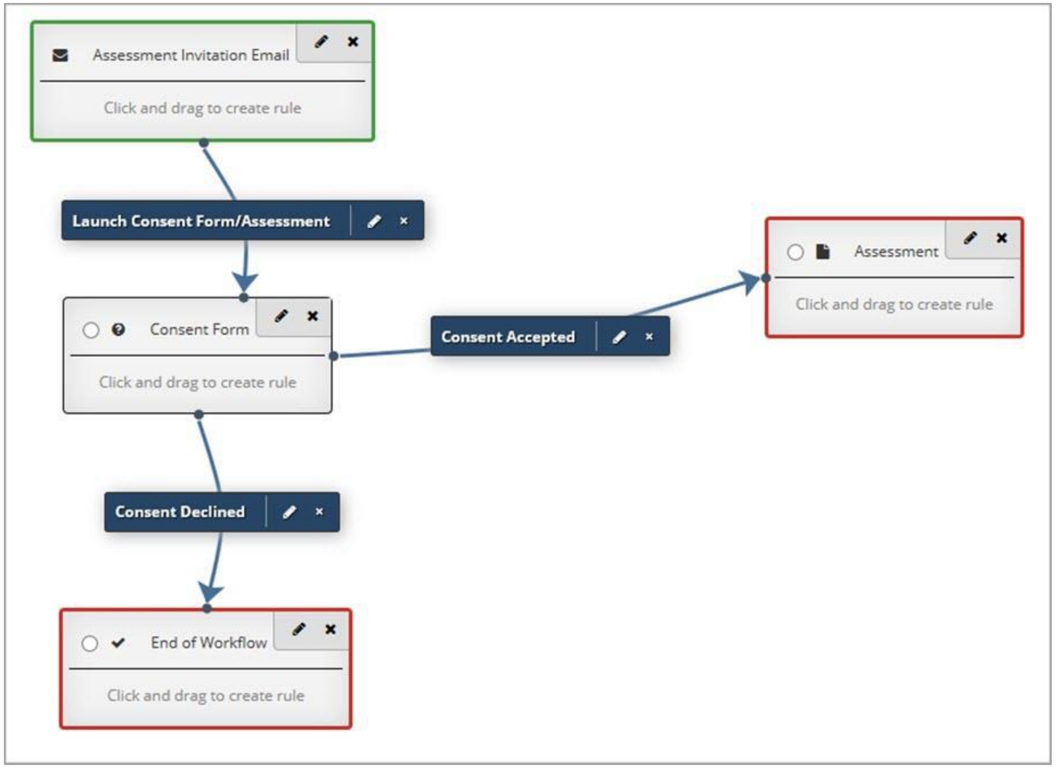
–Assign the Workflow to several test Candidates

–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.



QUESTIONS?

Contact Your PAN Account Representative