Human Resources: Practice Project #1

In this activity, you will be setting up a Sys.tm Flow to process employment applications. The Flow begins with the HR department, where a user will either select a checkbox after scheduling an interview for managers, or a checkbox that will email the applicant thanking them for their application.

The Manager will then interview the applicant, and from a dropdown menu, they will choose whether or not to offer employment. Selecting Yes will send an email offering the position. Selecting No will send a different thank you email.

1. Log into Sys.tm at www.sys.tm/signin or create an account with a free 30 day trial at www.sys.tm/signup.
2. Before starting this project, click here to access and download the sample documents you will be using for the Human Resources Projects
    a. When downloaded, navigate to the **HR-Sample-data.zip** file on your PC
    b. Right-click on the **ZIP file** and choose **Extract All**
    c. When prompted to choose a location to save the extracted files, navigate to your **desktop** and click **Extract.** Or you can click **Extract All** in the file explorer **toolbar**

Adding a User Tasks Widget to the Dashboard:

1. Log into Sys.tm Web.
2. On the **Dashboard**, click the hamburger menu icon and select **Create New Widget**.
3. For **Name**, type **User Tasks**.
4. Click the **Type** dropdown and select **User Tasks**.
5. Click the **Assignment Filter** dropdown and select **All**.
6. Under **Displayed Columns**, select checkboxes for the following:
    a. Assigned User
    b. Flow Name
    c. Activity Name
    d. Display Info
    e. Menu
    f. Priority
7. Click **Create**.
    a. For **Dashboard Name**, delete the existing text and type **User Tasks**.
    b. Click **Save**.

Administration and Setup:

1. On the Sys.tm Dashboard under **Features**, click **Metadata**.
2. Create a Metadata Property.
    a. On the right, click **Create**.

   b. For **Name**, type **Applicant Name**.
   c. Leave **Type** as **Text**.
   d. Click **Create**.
3. Repeat the previous step to create the following properties:
   a. Document Date
      i. When creating the **Document Date** property, click the dropdown for **Type** and select **Date/Time**.
      ii. After selecting **Date/Time**, click the dropdown for **Display Format** and select **shortDate**.
   b. Document Type
   c. Position
4. Create a Collection.
   a. Click the **Collections** tab.
   b. On the right, click **Create**.
   c. For **Name**, type **Employment Applications**.
   d. Add metadata properties to the collection.
      i. Next to **Property Name**, click the **plus icon**.
      ii. Select the checkboxes next to the properties created in the previous steps:
         1. Applicant Name
         2. Document Date
         3. Document Type
         4. Position
      iii. Click Add.
   e. Click **Create** to close the Create New Collection window.
5. Click on the **Sys.tm** logo in the top left corner of the browser window to return to the Dashboard.
6. Create a Group
   a. Under **Features** on the left, click **Users and Groups**.
   b. Click the **Groups** tab.
   c. On the right, click **Create**.
      i. For **Group Name**, type **Human Resources**.
      ii. Click **Create**.
      iii. Select the checkbox for your username.
      iv. Click **Add** to close the Add Users to Group window.
   d. Click **Close** to close the Current Membership window.
7. Configure permissions for the Human Resources group.
   a. Click the three dots for the **Human Resources** group and select **Permissions**.
   b. Click the arrow next to **File System** to expand the available options.
   c. Click the **toggle** button next to **Access**.
   d. Click **Save** to close the Permissions – Human Resources window.
8. Repeat the previous step to create a second group named **Managers**.
9. Click the **Sys.tm** logo in the top left corner to return to the **Dashboard**.
10. Create a folder for new applications
   a. On the left under **Features**, click **Files**.

    b. On the right, click **New Folder**.
        i. For **Folder Name**, type **Employment Applications**.
        ii. Click **Create**.
11. Assign groups and permissions to the folder.
    a. Click the three dots for the new folder and select **Properties**.
    b. Click the **Security** tab.
    c. Click the **Group** button.
        i. Click the **checkboxes** next to the following groups:
            1. Human Resources
            2. Managers
        ii. Click **OK** to close the Select a Group window.
    d. Click the **checkbox** next to Folder/File Permissions to assign all permissions.
    e. Click **Save** to close the Properties window.
12. Upload test files.
    a. Click the **Employment Applications** folder.
    b. On the right, click **Upload**, then select **Files**.
    c. Locate the files provided with training.
    d. Select **Application1.pdf** and **Application2.pdf**.
    e. Click **Open**.
13. Click the **Sys.tm** logo in the top left corner to return to the Dashboard.

Create a Flow to process Applications:

1. On the Dashboard under Features, click **Flows**.
2. Create a Flow.
    a. On the right, click **Create** and select **Designer**.
    b. For **Name**, type **HR – Employment Applications**.
    c. Click **Create**.
3. Add an activity to dynamically obtain and set metadata properties in Sys.tm.
    a. In the **Activities** column on the left, click and drag **AI Query** to the **Flow Designer** window and place it **between the Start and Stop icons**.
    b. Click the three dots for **AI Query** and select **Properties**.
    c. Select a Metadata Collection to store metadata values.
        i. Click the **Metadata Output** tab.
        ii. Click the dropdown for **Metadata Collection** and select **Employment Applications**.
    d. Configure a Property Bag variable to store and use a dynamic value later in the Flow.
        i. Click the **Property Bag Output** tab.
        ii. Click the **plus sign** next to **Property Bag Output**.
        iii. Under **Property Bag Name** and after **AIQuery/**, type **Position**.
        NOTE: The text AIQuery/ cannot be changed. Begin typing after the slash. E.g. AIQuery/Position
        iv. Click the **Configure** icon in the **Query** textbox.

v. In the **Query** textbox, type or paste the following: **What position are they applying for?**
vi. Click **OK** to close the Query – Position window.

e. Click **OK** to close the AI Query – Properties window.

4. Save your progress.

   NOTE: It is recommended to save often.

   a. Click the **Save icon** in the top right corner of the Flow Designer window.
   b. When prompted to Publish, click **No**.

5. Add and configure a task to review new applications.
   a. On the left under Activities, click and drag **User Tasks** to the **Flow Designer** window and place it below **AI Query**.
   b. Click the three dots for **User Tasks** and select **Properties**.
   c. Rename the Activity
      i. Click the **General** tab.
      ii. For **Name**, replace **User Tasks** with **HR Review**.
   d. Assign the task administrator.
      i. Click the **Administrators** tab.
      ii. Click the **Group** button.
      iii. Select the **checkbox** next to **Administrators**.
      iv. Click **OK** to close the Select a Group window.
   e. Add instructions for Human Resources to review the application.
      i. Click the **Instructions** tab.
      ii. Click in the text editor box and type or paste the following: **Review the application to determine if the applicant should proceed to the next step, then select one checkbox.**
      iii. In the **Display File(s)** textbox, click the **Builder (wrench)** icon.
         1. Under **Instance Variables**, click **File IDs**.
         2. Click **OK** to close the Configure Dynamic Value window.
      iv. In the **Display Information** textbox, click the **Builder** icon.
         1. Under **Property Bag Variables**, click **Position**.
         2. Click **OK** to close the Configure Dynamic Value window.
   f. Configure the notification for task participants.
      i. Click the **Notifications** tab.
      ii. For **Subject**, type or paste the following: **A new application has been received**.
      iii. In the **Text Editor** section**,** type or paste the following**: Please review the new application**.
      iv. Hit **Enter** on the keyboard to move to the next line.
      v. At the bottom of the text editor, click **Start Task** to add a start button to the email.
   g. Select participants to review the application.
      i. Click the **Participants** tab.
      ii. Click the **Group** button.
         1. Select the **checkbox** next to the **Human Resources** group.

iii. Click **OK** to close the Select a Group window.

h. Create two checkboxes indicating whether to interview the applicant.
  i. Click the **Selections** tab.
  ii. Create the first option.
    1. Click the **plus sign** next to **Description**.
    2. For **Name**, type **Schedule Interview**.
    3. For **Property Bag Name**, type **Interview**.
    4. For **Description**, type or paste the following: **If you move forward with the applicant, select this checkbox once an interview is scheduled**.
    5. Click **Create** to close the Create Selection window.
  iii. Add a second option.
    1. Click the **plus sign** next to **Description**.
    2. For **Name**, type **Decline Interview**.
    3. For **Property Bag Name**, type **Decline**.
    4. For **Description**, type or paste the following: **Select this checkbox to decline an interview and send the applicant a thank you email**.
    5. Click **Create** to close the Create Selection window.

i. Click **OK** to close the properties window.

6. **Save** your progress, but **do not Publish**.
7. Add a task for manager review.
  a. On the left under Activities, click and drag **User Tasks** to the Flow Designer window and place it under **HR Review**.
  b. Click the three dots for **User Tasks** and select **Properties**.
  c. Rename the activity.
    i. Click the **General** tab.
    ii. For Name, type **Manager Interview**.
  d. Assign the task administrator.
    i. Click the **Administrators** tab.
    ii. Click the **Group** button.
      1. Click the **checkbox** next to the **Administrators** group.
      2. Click **OK** to close the Select a Group window.
  e. Add instructions for the Managers reviewing applications.
    i. Click the **Instructions** tab.
    ii. In the text editor box, type or paste the following: **After the interview is completed, click the dropdown and select one option**.
    iii. Display the application for review.
      1. Below the text editor box, click the **Builder** icon for **Display File(s)**.
      2. Under **Instance Variables**, click **File IDs**.
      3. Click **OK** to close the Configure Dynamic Value window.
    iv. Display the Position metadata value on the User Tasks widget.
      1. Click the **Builder** icon for **Display Information**.
      2. Under **Property Bag Variables**, click **Position**.
      3. Click **OK** to close the Configure Dynamic Value window.

f. Configure the manager's notification.
   i. Click the **Notifications** tab.
   ii. For **Subject**, type **Interview Scheduled**.
   iii. Click in the text editor box and type or paste the following: **An interview has been scheduled with the applicant. After the interview has concluded, complete this user task from the dashboard**.
g. Select Participants.
   i. Click the **Participants** tab.
   ii. Click the **Group** button.
      1. Click the **checkbox** for the Managers group.
      2. Click **OK** to close the Select a Group window.
h. Configure the Yes/No dropdown for the Managers group.
   i. Click the **Selections** tab.
   ii. Click the **plus sign** next to **Description**.
      1. For **Name**, type **Select One**.
      2. For **Property Bag Name**, type **Hire**.
      3. For **Description**, type or paste the following: **Select Yes to offer employment. Select No to decline**.
      4. Click the **Selection Type** dropdown and select **Dropdown**.
      5. In the **New Option** textbox, type **Yes**.
      6. Click the **plus sign** next to **Yes** to add the option.
      7. Add a second option: **No**.
   iii. Click **Create** to close the Edit Selection window.
i. Click **OK** to close the Manager Interview – Properties window.

8. Add a second transition to the HR Review step.
   a. Click the three dots for **HR Review** and select **Properties**.
   b. Click the **Transitions** tab.
      NOTE: The default transition is to Manager Interview, but a second transition is needed for declined applicants. Each transition will be based on the selection made.
   c. Click the **plus sign** next to **Continue**.
      i. For **Branch Name**, replace **Default** with **Decline Interview**.
      ii. Click the **plus sign** next to **Target Activity**.
         1. Click **Send Email**.
         2. For **Name**, replace Send Email with **Send Thank You Email**.
         3. Click **OK** to close the Add Activity window.
      iii. Click the **plus sign** next to **Condition**.
         1. Click the **Builder icon** for **First Operand**.
      iv. Under **Property Bag Variables**, click **Decline Interview**.
         1. Click **OK** to close the Configure Dynamic Value window.
      v. Click the **Operator dropdown** and select **Is not null**.
         NOTE: This means that the Decline checkbox was selected.
         1. Click **Create** to close the Create Condition window.
      vi. Click **Create** to close the Create Transition window.

9. Configure the default transition.
    a. Click the three dots for the transition named **Default** and select **Properties**.
        i. For **Branch Name**, replace **Default** with **Manager Interview**.
        ii. **Uncheck** the box next to **Continue Evaluating After Transition**.
        iii. Click the **plus sign** next to **Condition**.
            1. Click the **Builder icon** for **First Operand**.
                a. Under **Property Bag Variables**, click **Schedule Interview**.
                b. Click **OK** to close the **Configure Dynamic Value** window.
            2. Click the dropdown for **Operator** and select **Is not null**.
            3. Click **Create** to close the **Create Condition** window.
        iv. Click **Save** to close the Manager Interview – Properties window.
    b. Click **OK** to close the HR Review - Properties window.
10. Save your progress but **do not Publish**.
11. Configure the Thank You Email.
    a. Click the three dots for **Send Thank You Email** and select **Properties**.
    b. Add an email address.
        i. Click the **Addressees** tab.
        ii. Type your **email address** in the **To** textbox.
        NOTE: In a real-world situation, a Property Bag variable containing the applicant's email could be used for this field.
    c. Configure the Subject and Email Body.
        i. Click the **Email Body** tab.
        ii. For **Subject**, type **Application for Employment**.
        iii. Click in the **text editor box** and type or paste the following: **Thank you for your interest in our company. We've had the opportunity to review your application, but we've decided to move forward with other candidates who more closely match the requirements for this role.**
    d. Click **OK** to close the Send Email – Properties window.
12. Add an email activity to send a job offer letter.
    a. On the left, click and drag **Send Email** to the Flow Designer window and place it directly below the **Manager Interview** activity.
    b. Click the three dots for **Send Email** and select **Properties**.
    c. Rename the activity.
        i. Click the **General** tab.
        ii. For **Name**, delete the existing text and type **Job Offer Email**.
    d. Configure Addressees.
        i. Click the **Addressees** tab.
        ii. Type your **email address** in the **To** textbox.
    e. Configure Subject and Email Body.
        i. Click the **Email Body** tab.
        ii. For **Subject**, type **Recent Interview**.
        iii. In the text editor box, type or paste the following: **Thank you for your interest in our company. We have concluded, based on your interview and**

qualifications, that you are the most suitable candidate for our current opening. As previously discussed, the details of your offer, including compensation, benefits, and specific responsibilities, are outlined in the attached offer letter.

f. Click **OK** to close the Send Email - Properties window.

13. Configure the default Manager Interview transition.
    a. Click the three dots for **Manager Interview** and select **Properties**.
    b. Click the **Transitions** tab.
    c. Click the three dots for the **Default** transition and select **Properties**.
        i. For **Branch Name**, replace Default with **Job Offer**.
        ii. **Uncheck** the box next to **Continue Evaluating After Transition**.
        iii. Click the **plus sign** next to **Condition**.
            1. Click the **Builder** icon for **First Operand**.
            2. Under **Property Bag Values**, click **Select One**.
            3. Click **OK** to close the Configure Dynamic Value window.
        iv. In the **Second Operand** textbox, type **Yes**.
            1. Click **Create** to close the Create Condition window.
        v. Click **Save** to close the Job Offer Email – Properties window.
14. Add a second transition.
    a. Click the **plus sign** next to **Continue**.
        i. For **Branch Name**, replace **Default** with **Thank You Email**.
        ii. Click the **plus sign** next to **Target Activity**.
        iii. Click **Send Email**.
        iv. For **Name**, replace **Send Email** with **Send Thank You Email – Post Interview**.
        v. Click **OK** to close the Add Activity window.
    b. Click the **plus sign** next to **Condition**.
    c. Click the **Builder icon** for **First Operand**.
        i. Under **Property Bag Variables**, click **Select One**.
            1. Click **OK** to close the **Configure Dynamic Value** window.
        ii. In the **Second Operand** textbox, type **No**.
        iii. Click **Create** to close the Create Condition window.
    d. Click **OK** to close the Manager Interview – Properties window.
15. Configure the new Send Email activity.
    a. Click the three dots for **Send Thank You Email – Post Interview** and select **Properties**.
    b. Add an addressee.
        i. Click the **Addressees** tab.
        ii. Type your **email address** in the **To** textbox.
    c. Configure the Subject and Email Body.
        i. Click the **Email Body** tab.
        ii. For **Subject**, type **Recent Interview**.
        iii. In the text editor box, type or paste the following: **Thank you for your interest in our company. We greatly appreciate the opportunity to get to know you and learn more about your qualifications. After thoroughly looking at your**

skills and experience, we've decided to move forward with another candidate who more closely align with our current needs.

   d. Click **OK** to close the Properties window.

16. Save, Publish, and Enable the Flow.
    a. Click the **Save** icon.
    b. When prompted to **Publish**, click **Yes**.
17. Click the **Sys.tm** logo in the top left corner to return to the **Dashboard**.

Testing the HR – Applications Flow:

1. On the Dashboard under **Features**, click **Files**.
2. Navigate to the folder named **Employment Applications**.
3. Process the sample files.
   a. Click the checkbox next to each file.
   b. On the right, click **Start Flows**.
      i. Click the checkbox next to **HR – Employment Applications**.
      ii. At the bottom of the window, ensure that the radio button next to **Start separate flow instances for each selected file** is selected.
      iii. Click **Start**.

   NOTE: The amount of processing time varies. If you do not receive an email within 10 minutes, check Flow Logs for errors.
4. Complete the first User Task.
   a. Open the first email received and click the **Start** button.
   b. Select the **checkbox** next to **Schedule Interview**.
   c. Click **Submit**.
5. Complete the next User Task.
   a. Open the second email and click the **Start** button.
   b. Select the **checkbox** next to **Decline Interview**.
   c. Click **Submit**.
6. Complete the Manager Review task.
   a. Once the email for **Manager Review** is received, navigate to the Sys.tm web **Dashboard**.
   b. In the **User Tasks** widget, click the task with **Activity Name** set to **Manager Interview**.
   c. Click **Select One** and select **Yes**.
   d. Click **Submit**.