

# System Configuration

## Course Overview

Has it been some time since your system was implemented and your team no longer has the knowledge to carry out common configuration tasks? Are you about to implement some process improvements and need a refresher on the basics of system configuration? Have you recently received a system upgrade, added some extra features to your system and want to fully update your teams knowledge and skills with regard to configuring and getting the best out of your system?

**If you've answered YES to any of these questions, then our 2-day System Configuration course may be for you.**

In this course we'll teach you how to carry out common configuration tasks such as updating your Application and Onboarding Forms and Flows, managing your Authorisation and Recruitment Workflows; along with more technical tasks such as Password and Security settings, GDPR settings and much more. This course is an ideal alternative to our 3-day Standard User Training if you want to focus purely on system configuration, without spending time looking at Dashboards, Reports and Talent Pooling.

This is a hands-on and interactive training course, ideally delivered on-site, either at your offices or our Kidderminster HQ.

By the end of this course, you will be able to:



### Manage with Confidence

Manage your core record types, user and access permissions



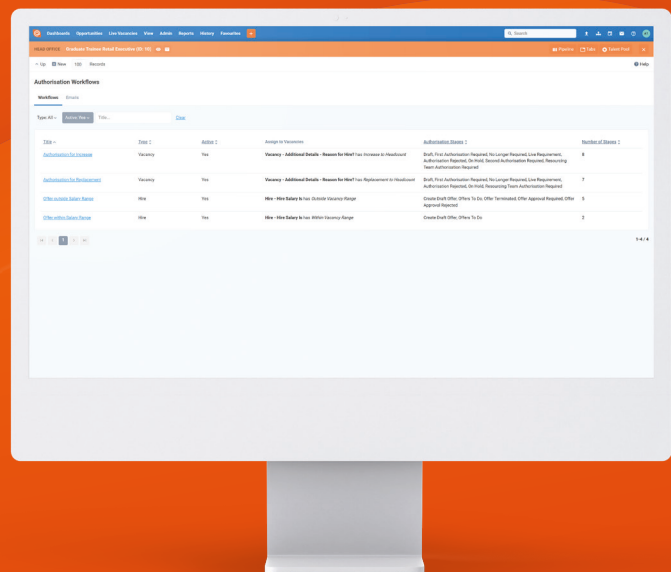
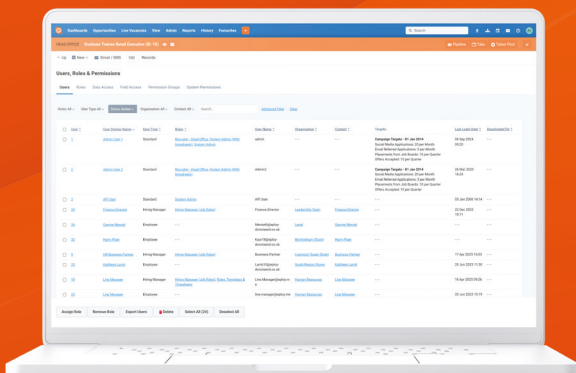
### Utilise & Streamline Workflows

Update and refine your Workflows, Forms, Flows and Document Templates



### Capture the Data You Need

Enhance the data collected within your system through the use of Custom Fields



*To book this course, please speak to your Eploy Implementation Manager or Account Manager, or get in touch at [info@eploy.co.uk](mailto:info@eploy.co.uk).*

**Agenda**

**DAY 1**

**Morning**

Eploy Introduction - Recap

Organisation, Contact and User Records

User Roles and Permissions

Standard and Hiring Manager User Password and Security Settings

**Afternoon**

Vacancy Templates

Vacancy Template Forms

Vacancy and Hire Authorisation Workflows and Email Templates

Vacancy and Hire Drop Down Lists

**DAY 2**

**Morning**

Recruitment Workflows

Recruitment Workflow Drop Down Lists

Email & SMS Templates

iCal Templates

**Afternoon**

Candidate Security and GDPR/Consent Settings

Portal Notifications

Application and Onboarding Forms and Flows

Document Templates, Reference and Job Alert Settings

Day 1 begins with a recap of the main system components and key user interface elements. We then move on to look at managing your Organisational structure, Contacts and Users. After a quick break we delve into User Roles and Permissions, finishing off the morning with Standard and Hiring Manager Security Settings. In the afternoon we move onto Vacancy Templates and Vacancy Template Forms, followed by Vacancy Authorisation Workflows and email templates, finishing up with a review of the Drop Down Lists used within both your Vacancy Authorisation Workflows and Vacancies themselves.

Day 2 starts with a refresh on managing your Recruitment Workflows, Application Stage Names, Application Statuses, Action Types and Outcomes, Hire Statuses, Email & SMS Templates and iCal templates. After lunch we review your Candidate Security and GDPR/Consent settings, Candidate and Application Source Tracking options, Portal Notifications, Application and Onboarding Forms and Flows, Document Templates, Reference Collection and Job Alert settings. Throughout the course of the two days we will return, several times, to the topic of custom fields, demonstrating how to capture additional, reportable, information within your main record types.