## **International Rollout Checklist umantis Applicant Management**

<https://recruitingapp-XXX.umantis.com>

Would you like to internationally rollout your umantis Applicant Management solution?

This checklist is sorted by key topic areas that cover the most important aspects of an international rollout. Some aspects appear under multiple topics, as they can be seen from different views.

### Branch Offices

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|  | Term | Description |
|  | **Create branch offices** | These can be companies, countries, regions…  <https://recruitingapp-XXX.umantis.com/Administration/Agency> |
|  | **Check authorization concept** | Is a branch office restriction required?  Can be found under „Settings“ within the user-profile. |
|  | **Adjust the data protection policy** | Are there different countries with different data requirements, which should be integrated into the data protection policy?  <https://recruitingapp-XXX.umantis.com/Administration/Agency/1/Profile> |
|  | **Advertisement text templates** | Are further templates needed?  <https://recruitingapp-XXX.umantis.com/Administration/Agency/1/Profile> |
|  | **Separate application forms?** | Each branch office has the opportunity to configure its own individual application form (show/hide fields)  <https://recruitingapp-XXX.umantis.com/Administration/Agency/1/Settings> (make the „Application process configuration“ area visible) |
|  | **Spontaneous applications** | Does the spontaneous application concept apply to your company? To each branch office? |
|  | **Job subscription** | Do all countries, regions and companies use the job subscription? |
|  | **Adjust system emails** | Confirmation of (application) receipt and job subscription E-Mails  <https://recruitingapp-XXX.umantis.com/Administration/Agency/1/JobAboMailing> |
|  | **Sender address for system emails** | The E-Mail addresses entered under the branch office profiles are used for the sender address in system E-Mails linked with the branch office.  e.g.: <https://recruitingapp-XXX.umantis.com/Administration/Agency/1/Basics/Address> |

### Users

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|  | Term | Description |
|  | **Creating and / or importing HR users and line managers** | Check the branch office assignment  <https://recruitingapp-XXX.umantis.com/Administration/Users> |
|  | **Check branch office restrictions** | Are branch office restrictions necessary?  “Settings” area in user profiles |
|  | **Send login/ access information** |  |

### Text fields, lists

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|  | Term | Description |
|  | **Check selection lists** | Are all terms clear and comprehensible worldwide?  <https://recruitingapp-XXX.umantis.com/Administration/Dropdown> |
|  | **Has all necessary information been entered?** | Configure (show/hide) and rename fields or lists |

### Communication

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|  | Term | Description |
|  | **Check existing templates and create new ones if necessary** | E-Mail-, letter-, print templates Note: access can be limited by branch office  <https://recruitingapp-XXX.umantis.com/Contact/Templates> |
|  | **Check and change (if needed) system E-Mails** | In the system E-Mails tab and the branch office settings  <https://recruitingapp-XXX.umantis.com/Administration/SystemTemplates>  <https://recruitingapp-XXX.umantis.com/Administration/Agency/1/JobAboMailing> |
|  | **Check default E-Mail settings** | Sender address for system E-Mails, central sender address …  [https://recruitingapp-XXX.umantis.com/Administration/Show](https://recruitingapp-80286291.umantis.com/Administration/Show) |
|  | **E-Mail relay** | Is there an E-Mail relay that needs to be (expanded) changed? |

### Translations

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|  | Term | Description |
|  | **View texts** | Possible to export – translate – import view texts  <https://recruitingapp-XXX.umantis.com/Administration/Texts/ImportExport> |
|  | **Selection lists** | Possible to export – translate – import selection lists  <https://recruitingapp-XXX.umantis.com/Administration/Texts/ImportExport> |
|  | **System E-Mails** | In the system E-Mails tab under settings and within the branch office settings  <https://recruitingapp-XXX.umantis.com/Administration/SystemTemplates>  <https://recruitingapp-XXX.umantis.com/Administration/Agency/1/JobAboMailing> |
|  | **Communication templates** | E-Mail-, letter-, print templates  <https://recruitingapp-XXX.umantis.com/Contact/Templates> |
|  | **Assistants** | Possible to export – translate – import assistants  <https://recruitingapp-XXX.umantis.com/Administration/Texts/ImportExport> |
|  | **Diagram templates** | Possible to export – translate – import diagram template legends and titles  <https://recruitingapp-XXX.umantis.com/Administration/Texts/ImportExport> |
|  | **Upload 404/403 pages** | Standard 404/403 error pages are already uploaded for German in the umantis solution. If you use more or other langugaes in umantis, then you can upload additional 404/403 HTML pages in the design tabs under the respective languages.  These HTML pages can be found – already translated – in our online help:  <https://de.onlinehelp.umantis.com/index.php/Externer_Auftritt#Ihre_404-Seite> |
|  | **Training materials** |  |

### Design / Integration

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|  | Term | Description |
|  | **Are further designs necessary?** | Multiple designs are possible for the external areas (job market, line manager cockpit, applicant cockpit, board cockpit, head-hunter cockpit)  <https://recruitingapp-XXX.umantis.com/Administration/Design/Basics/Skins> |
|  | **Integration in local (country) homepages?** | Prepare „test pages“ before go-live |
|  | **Will separate job markets be implemented?** | It is possible for each branch office to have its own job market. In which languages will the open positions be published? One job market for all languages? |
|  | **Is the universal job market needed?** | /Jobs/All  OR the language-specific job markets. /Jobs/1; /Jobs/2 … |
|  | **Are multiple/different application forms needed?** | The application form can be configured individually per branch office (show/hide) |
|  | **Spontaneous applications** | Does the spontaneous application concept fit? |
|  | **Job subscription** | Do all countries use the job subscription? |
|  | **Create further .job advertisement templates (multiple languages?)** |  |
|  | **Intranet** | Are there individual intranet pages? Each will need to integrate the internal job market, line-manager cockpit and „/selfservice“ applicant cockpit.  Language independent: VacanciesIntraxData/All |

### External Job Platforms

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|  | Term | Description |
|  | **Check existing contracts with external job platforms** | Can other countries also publish open positions via these job platforms?  <https://recruitingapp-XXX.umantis.com/Administration/JobPlattforms/PlattformsDynamic> |
|  | **Are XML interfaces needed/ need to be changed?** | A language or branch office ID may need to be transmitted |
|  | **Integrating further job platforms** | Do further, country-specific job platforms need to be integrated?  <https://recruitingapp-XXX.umantis.com/Administration/JobPlattforms/PlattformsDynamic> |

### IT

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|  | Term | Description |
|  | **Are the IP-restrictions still active?** | Are all employees, that need access to umantis, included in the IP-ranges?  <https://recruitingapp-XXX.umantis.com/Administration/SecuritySettings> |
|  | **Check new mail servers / SPF-restrictions** | Do E-Mails reach their recipients both internally and externally? Are they blocked not delivered correctly?  <https://de.onlinehelp.umantis.com/index.php/SPF-Eintrag> |
|  | **If Single-Sign-On (SSO): check functionality** | URL, PKI, AD  <https://de.onlinehelp.umantis.com/index.php/Single_Sign_On>  <https://recruitingapp-XXX.umantis.com/Administration/SecuritySettings> |
|  | **Outlook Plug-In** | (if used:) install for all HR users <https://de.onlinehelp.umantis.com/index.php/Outlook-Plugin> |
|  | **Interfaces** | Do the user import or application export need to be changed in an ERP-system? |

### Migration

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|  | Term | Description |
|  | **Create or import current vacancies** | Discuss possibilities with consultant |
|  | **Migrate current applications from previous system?** | Discuss possibilities with consultant |

### Training

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|  | Term | Description |
|  | **If needed: train further administrators** | Try to keep the administrator group as small as possible. |
|  | **Train HR** | On location or web-based? |
|  | **Handout / E-Training / Webtraining for line managers** |  |

### Organisation

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|  | Term | Description |
|  | **Will the administrator group (super users) expand?** | Try to keep the administrator group as small as possible |
|  | **Organize regular coordination meetings for super-users** | Changes should only be made in the system after a joint discussion and decision |
|  | **Coordinate and agree upon (could be different) recruiting processes between various countries** | The introduction of a new recruiting software can lead to new or different processes. |

### Legal Guidelines

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|  | Term | Description |
|  | **When do applications have to be deleted / anonymised?** | Applications, where the applicant actively clicked on the «delete» link via SelfService; Applications without data release; Applications with data release |
|  | **Do further committees have to be involved in the application process?** | e.g. works council or management board |
|  | **Is there a reporting obligation to government agencies?** | e.G. EEO-report in the USA |

### Go Live

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|  | Term | Description |
|  | **Link job market and cockpits with websites** | Activate the “test pages” – go live |
|  | **Publish the migrated positions** | Verify whether all positions that should be published are currently published on the correct job markets and platforms |
|  | **Send all users their access information** | If they have not already received their access information |
|  | **International notice to all affected subsidiaries of the launch and go-live of the new recruitment platform** | If desired |