

Move to Next Round

First bundle set-up

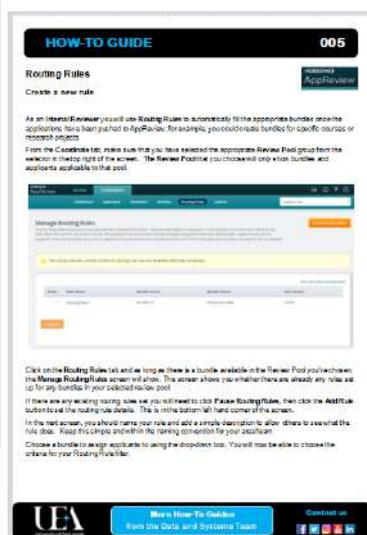
The **Move to Next Round** function allows you to manage a second stage of the review process within AppReview. This is useful for interviewing courses, funding selection panels or for other selection processes that may need more than one review or stage of process before a final decision is reached.

Read through this card before making your bundles. Make sure that you have planned your review sheet questions, have reviewers in mind, know your naming convention and have final recommendations that are relevant to the reviewer. It is also best to plan out how many potential bundles may be needed for your review selection chain.

★ **Enable Move to Next Round must be selected at the time of building the Bundle. Once the Bundle is activated the feature can't be added retrospectively.**

More information about building Bundles can be found in **004 HOW-TO GUIDE** and **005 HOW-TO GUIDE**.

Start to build the initial bundle as shown in **004 HOW-TO GUIDE**. Make sure that in the bundle settings, you have checked the box to **Enable Move to Next Round option** in the Advanced workflow options.



Rename the **Move to Next Round** text to something more appropriate for your purpose. e.g. 'Move to Next Selection Round', 'Refer to school' or 'Submit decision'.

★ **This is the text that your head reviewer will need to select as their Final Recommendation in this bundle.**

You can set more questions within the **Review Sheet** as part of the review process to indicate the preferred decision such as 'Invite to Interview' or 'Reject'.

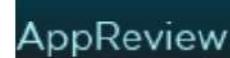
The **Final Recommendation** option should be set to be 'DO NOT USE' or similar so as this option is not selected by the Head Reviewer.

Add a **Routing Rule** to pick up applicants to this bundle and **Activate** the bundle.

Now you should build your first Next Round bundle, following the bundle-building guidelines as before. If this bundle leads to another Next Round bundle you should remember to check the box to **Enable Move to Next Round** and set the text accordingly.

As these bundles are likely to be very similar in content and Final Recommendation, you may decide to copy the original bundle Review sheet by clicking the '**Copy and edit an existing one**' link when you're on the **Customise Review** page. Once complete, you should activate the bundle(s).

Move to Next Round



Workflow set-up

Continue making your bundles until you've completed enough to cover all possible pushes to the next round of assessment prior to a final decision being sent back as the **Final Recommendation** to AY. The last bundle in the chain of progression should not have the **Enable Move to Next Round** option checked.

In the Co-ordinate tab, click the **Bundles** section and find the bundle that is the initial one in your chain of bundles. Click the Actions cog button then select **Workflow** from the options. This opens the screen to configure the rule that moves your applicants to the next bundle.

★ **You will need to complete the Move to Next Round configuration for each bundle that moves on to another review panel/stage of review.**



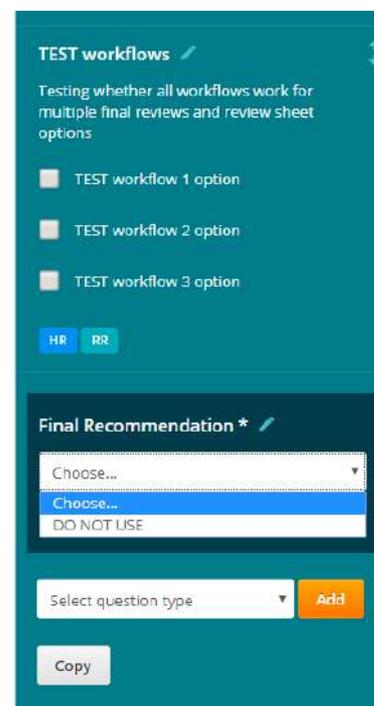
In the Configure Workflow screen, click the **Add** button. The screen will then change to allow you to build the route you need to push to the next round bundle.

Next, name your route and select the bundle it should push to next, in the drop-down list below. As with all Routing Rules, try to keep the name simple and informative for others to be able to easily identify what it does.

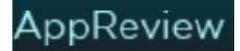
In the **Criteria Builder** section, choose **Review Question** from the first drop-down box. Then choose **Final Recommendation** in the next drop-down box. Choose **Equal To** from the next drop-down list. Finally, choose the **'Move To Next Round'** text that you updated when you built your bundles. Yours will probably not still say 'TEST Move to next round' like the example on the next page does.

If you wish to set your workflows to send to different bundles dependent on different answers to a question from your review sheet you will also have to set up a second part within this same group.

In the **Criteria Builder** click the grey plus button to add another row to your group. Choose **Review question** from the first drop-down list. Then choose the question option from your review sheet (an example is shown opposite of where this was set up) that you want to use, the example shows this as 'TEST workflows'; now choose **Equal to** from the next drop-down list. Finally select the text for the options shown in the last drop-down list - these should be the options you wrote on your Review Sheet when setting up the bundle, in the example this is shown as 'TEST workflow option 1'.



Move to Next Round



Workflow set-up

← Add Next Round Route for *Test move to next round*

Route Details

Name*

Bundle*

Criteria Builder

Group 1 Add Remove

Review Question ▼	TEST workflows ▼	Equal To ▼	TEST workflow 1 option ▼	-
Review Question ▼	Final Recommendation ▼	Equal To ▼	TEST Move to Next Round ▼	-

+

Cancel
Save
Save & Finish

Move to Next Round

Create rules to directly route applicants to another bundle in this review pool if the Head Reviewer selects the **Move to Next Round** option. If the Head Reviewer selects this option, the submitted Final Recommendation will not be reported back to the external system. If you choose to define criteria to assign applicants to the next bundle, you must order the criteria because an applicant can only be assigned to one bundle.

Order	Criteria Name	Assign to Bundle	Remove
1.	TEST option 1 move to next round	TEST workflow 1	
2.	TEST option 2 move to next round	TEST workflow 2	
3.	TEST option 3 move to next round	TEST workflow 3	

Inactivate

Move to Next Round

AppReview

Workflow set-up

Once you've set all requirements for this workflow select **Save and Finish** and then **Activate** the rule using the orange button. If you need to edit anything then you will firstly need to inactivate the workflows before editing. Once you've completed this section you may click the left arrow to go back to the Bundles page.

You should make as many **Move to Next Round Workflows** as you need to link all your bundles in their chain of progression. In the examples shown on the previous page, the applicant would move from the first bundle to the next dependant upon the option selected by the Head Review for the 'TEST workflows' question on the review sheet - either the 'TEST workflow 1 option', 'TEST workflow 2 option' or 'TEST workflow 3 option'. The Head Reviewer would then select 'TEST Move to next round' as their final recommendation (rather than 'DO NOT USE') and the applicant would move to the required bundle according to the answer to the question; so if the reviewer had selected 'TEST workflow 1 option' then the applicant would move through to the 'TEST workflow 1' bundle, as per the workflow shown.