Advanced Sequencing Overview

Advanced Sequencing · https://learnpcr.pcrecruiter.net/site/docs/advanced-sequencing/sequencing-setup/

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What is Advanced Sequencing?

PCRecruiter's Advanced Sequencing feature was designed to make daily tasks more efficient through pre-defined and automated workflows. Sequences help manage your day and expedite the onboarding of new users on your team — you can essentially sit a new hire down and have them work through the tasks in front of them with very little overhead. The Sequence will tell them exactly what to do next!

Create your unique sequences to help you plan and execute:

- Calls and voicemails, including easy access to your calling scripts.
- Personal email reminders and automatically timed ‘drip’ campaigns.
- Notifications to connect, message, and interact on LinkedIn and other networks.
- Send SMS messages via the RingCentral integration.
- Key candidate and client engagement activities.

Our Advanced Sequencing feature is highly configurable and comes with a number of advanced features and processes. If you would prefer a more basic option with quicker setup our Simple Sequencing feature would be best for you. If you're not sure which would be best visit our Advanced vs Simple Sequencing article or reach out to our support team and we can help you decide.

Sequencing Security Options

Once Sequencing is activated for a database, a PCRecruiter admin user will find a Sequencing security available for each user account. This setting will control access to Sequencing and the features available to the users within Sequencing.

1. Open **Settings** on the main toolbar.
2. Select Users.
3. Select Manage Users.
4. Select a username.
5. Select **Security** from the sidebar at the bottom left of the screen.
6. Under the 'Other' heading, set the **Sequencing** dropdown to one of the following (see table below for further detail):
    - No Permission
    - Read Only
    - Add/Update
    - Full Permission (Note: A user with a System Administrator setting of Full Permission automatically inherits rights of Full Permission regardless of Sequencing security.)
7. Also under the Other heading, set the **Sequencing Tasks** security to All Tasks or My Tasks.
8. Click **Save**.

Once a user has permission for Sequencing there will be an icon on their main toolbar which can be clicked to access this feature.

	No Permission	**Read Only**	**Add/Update**	**Full Permission**
Access Sequencing	**X**	✓	✓	✓
Execute Assigned Tasks	**X**	✓	✓	✓
View Sequence Overview and Templates	**X**	✓	✓	✓
Activate a Sequence	**X**	**X**	✓	✓
Pause/Resume a Sequence	**X**	**X**	✓	✓
End a Sequence	**X**	**X**	✓	✓
Create and edit Sequence Templates and Branches	**X**	**X**	✓	✓

Delete Sequence Templates	X	X	X	✓
Comparable Metrics	X	X	X	✓
Sequence Results	X	X	X	✓

Accessing Advanced Sequencing

With the proper level of security, the Advanced Sequencing feature can be accessed by selecting the Sequencing icon from the Main Toolbar. (Sequencing tasks can also be managed from inside of a Rollup List) The Sequencing feature is made up of five tabs:

- **Tasks:** This is the main screen of Sequencing. It is used for your day-to-day operations. Here you will see a list of Tasks to be completed today. You will be able to click on them to view the details of the person the task is for, as well as the details of the task to be completed.
- **Overview:** The Overview screen shows a general overview of your Active Advanced Sequences. Sequences can be paused from this screen, you can view the Rollup List the Sequence is connected to, and you can view general stats regarding the Sequence.
- **Templates:** Templates will show any prebuilt templates that are available to be edited and utilized as well as any templates you have created.
- **Comparable Metrics:** Comparable Metrics allow for filtering by Sequence, Username, Priority, Start Date and End Date to compare Steps, Completed Tasks, Users and Sequences. This screen is highly configurable on the fly to give you the data you are looking for.
- **Sequence Results:** Sequence Results allows you to do a deep dive into what has happened with your sequence. You will choose a specific Sequence and Branch and then utilize the Step Map to choose what you are viewing results for.