Sirenum by Bullhorn Integration with Bullhorn for Salesforce

Document Scope

This document describes the user cases supported by the integration between Sirenum by Bullhorn and Bullhorn for Salesforce.

Integration

In this document Sirenum by Bullhorn distinguish between different jobs:

- Permanent - this is not addressed in this integration since Bullhorn for Salesforce already provides the necessary capabilities.
- Temporary (or “Temp”) - the resourcing and fulfilling demand for temporary workers is addressed by the integration between Sirenum by Bullhorn and Bullhorn for Salesforce.

With regards to Temp jobs, these are either:

- **Structured**, where consultants have a fixed day-by-day Scheduler or pattern that is predetermined and the demand for the job is automatically generated.
  or
- **Unstructured**, and require manual[1] creation of individual daily demands.

There are two primary Integration Scenarios:

1. When a job is defined to capture the demand.

Here a Client or Constault creates a Job, searches for candidates from the internal pool and, if needed, acquires new candidates externally. This is typically used for structured jobs.

2. Whe Shift Demands rather than a Job are used to capture the initial demand.

These Shift Demands could be an extension of an existing job, represent an urgent shift requirement, etc. Here the client or consultant created Shift Demand(s), linking them to a new or existing Job, searching for candidates from the internal pool and, if needed, acquiring new candidates externally. This may be used to extend structure jobs or to create or extend unstructured ones.

[1] Or using some automation that is external to this integration.

Data Model

This section discusses key aspects of the Data Model used to capture details of the Demand and the fulfilment.

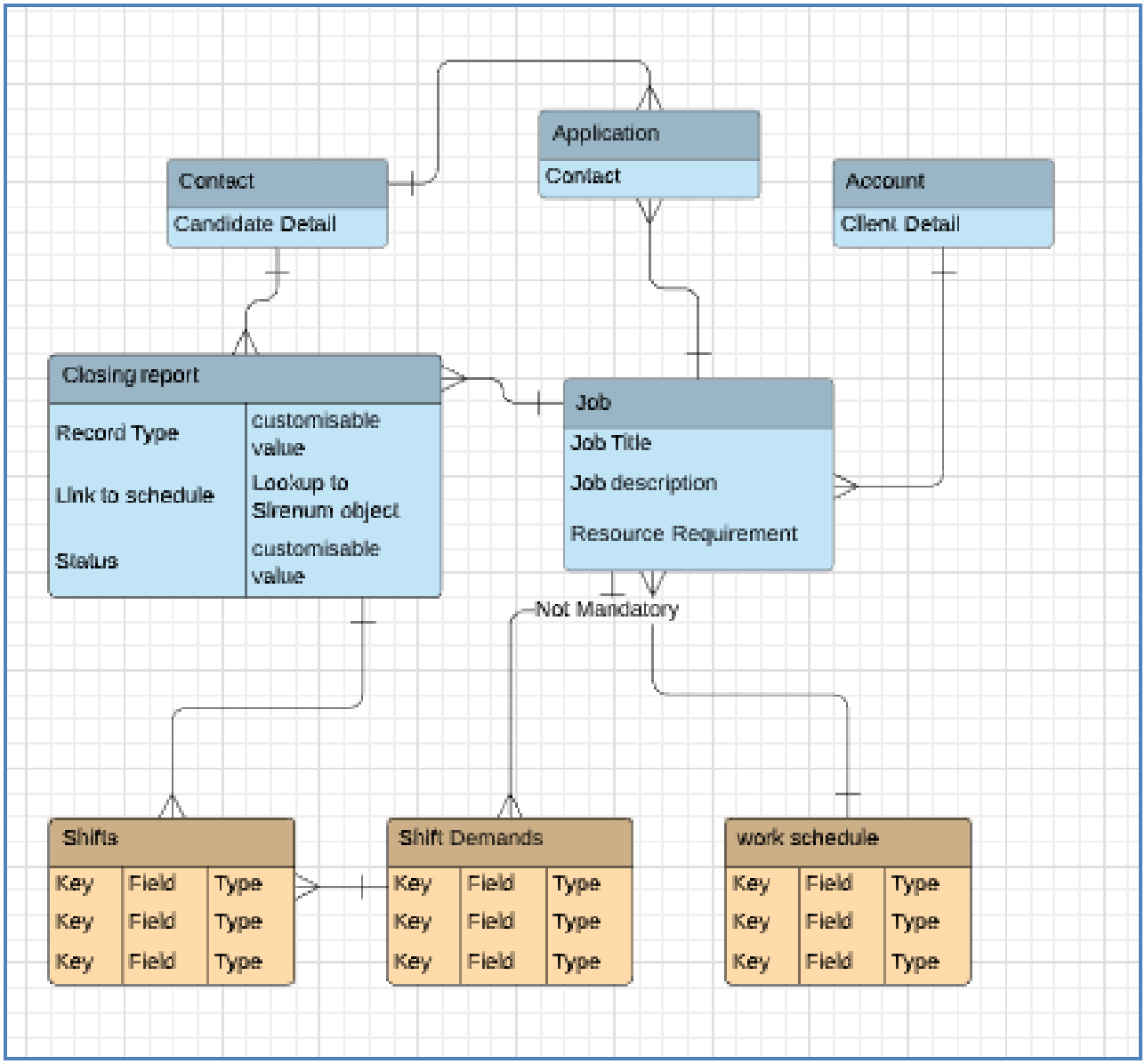

Figure 1 - Key Objects and their relationships

Jobs

These represent permanent or temporary demand for workers, performing a specific type of work for a given client.

Jobs can be hierarchical to support multiple types of work and/or decompose the demand into smaller parts.

The Job is defined with the following additional, and optional, Sirenum-related information:

- Auto Fulfil. Provides the default for the same value in generated Shift Demands.
- Contract
- Job Type
- Location. A physical place within a Site where the work is to be undertaken; applicable when a Site is large or several sites within the Site exist e.g., Ward B in Prince Albert Hospital.
- Rota. Interpretation is down to the specific implementation.
- Site. A physical place where the work is to be undertaken
- Work Schedule

The determination of required competencies is based on several of the above parameters.

Record types are used to distinguish between permanent and temporary jobs. Distinction between a structured and an unstructured temp job is controlled by the Work Schedule. There is none for an unstructured job.

When a Job is closed, depending on the status, this may cause (future) Shift Demands and Shifts related to the Job to be Cancelled.

Closing Reports

These represent the “placement” of a workerto a given Job. It is a master-detail child of Job and is a sibling of Application (the latter is an Object used to hold applicants for a Job and is also a child of Job).

The Closing Report is defined with the following information:

- Auto Assign. This controls whether Shifts should be automatically created from Auto Fulfil Shift Demands that match the Closing Report’s Job.
- Auto Generated. Indicates whether the Closing Report was created by the integration or by another means.
- Job
- Worker
- Pay Rate.
- Start Date. Optional
- End Date. Optional

Further Payroll and charging information may be required, e.g. to ensure use of Sirenum’s Time Interpretation on the Shifts against the closing Report, though this is outside the scope of the integration.

The integration can be defined to automatically extend Closing Reports to cover new Shifts, or to support multiple Closing Reports per Job for a given Worker with non-overlapping time intervals.

Key Sirenum Data Model Objects

Sirenum uses many different Objects, and these are required to:

- Define “master data”, such as Site, Rotas, Job Types, Contracts, Competency Conditions and Rate Cards.
- Represent Workers (e.g., Contacts) and their capabilities (e.g., Qualifications).
- Express demand and fulfilment, e.g., Shift Demands and Shifts.

The following is a short list of the key Objects:

Object	Description
Contact	A named worker. This typically has a geocoded “home base” to allow Sirenum to apply proximity-based scording for work.
Site	This is the named place of work. This is typically geocoded to allow Sirenum to apply proximity-based scording for workers
Contract	A named contract against which work is to be executed. This may alternatively represent a cost centre or purchase order; interpretation is down to the specific implementation.
Job Type	A named type of work. Typically used in conjunction with the Contract to categorise the work in hand.
Competency Condition	Matches a Shift via some combination of the Shift’s key parameters (such as Site[2], etc.) to determine a required Competency and how significant that Competency is. Any number of conditions might match a given Shift, meaning the Shift may require many different Competencies with different Severities.
Ticket	Represents the worker as holding a given Competency, perhaps for a specific period of time and including proof, where necessary. The Sirenum search functionality leverages Tickets and required Competencies when matching workers to Shift (amongst other requirements).
Rate Card	Used in the Sirenum Financial Module to determine (and whether) a Shift should be paid and/or charged, allowing for rates that vary by date, day, time, worker and/or other parameters and supporting overtime and double overtime calculations.
Work Schedule	A pattern of days and times (not dates) where work is required. This may be aligned to weekdays (allowing patterns like Monday to Friday), or may be entirely independent (allowing patterns like 4 on 4 off).

[2] While the integration does not provide this OOTB, it would be possible for an implementation to extend this to provide Job-specific Competency Conditions.

Shift Demand	A flavour of Shift with no worker though specifying the number of people required to fill (e.g., 10 people on 1st April 2025 from 08:00 till 15:00 with Site, Job, etc.). These may be manually created from an unstructured Job or may be automatically generated from a Work Schedule from a structured Job.
Shift	An individual Shift for a single worker at a Site, performing a specific Job under a given Contract and with a given start and end time.

New Record Type for Closing Report

Closing Report (the “placement” of a worker to a Job) includes an additional Record Type. “Shift Work”, to support the integration, this being used to identify Shift-based Closing Reports. It is this type of Closing Report that is automatically created when generating a Closing Report from a new (set of) assigned Shift(s) - an alternative record type can be configured if desired.

Scenarios

There are several different scenarios that can be realised via the integration between Sirenum and Bullhorn for Salesforce.

1. Permanent Jobs. These are not in scope for this document.
2. Temp Jobs starting from a predefined Job, either Structured or Unstructured (e.g., with or without a Work Schedule.
3. Temp Jobs created via the Sirenum Schedule while creating Shift Demands or Shifts:
    a. This may be extending an existing (typically unstructured) Job.
    b. This may require a new (typically unstructured) Job.

The main scenarios for temp Jobs are:

- Acquire external candidates
- Select candidates from an existing pool.
- Use candidates from an existing pool and if needed acquire external candidates

Temp Jobs Acquire External Candidates

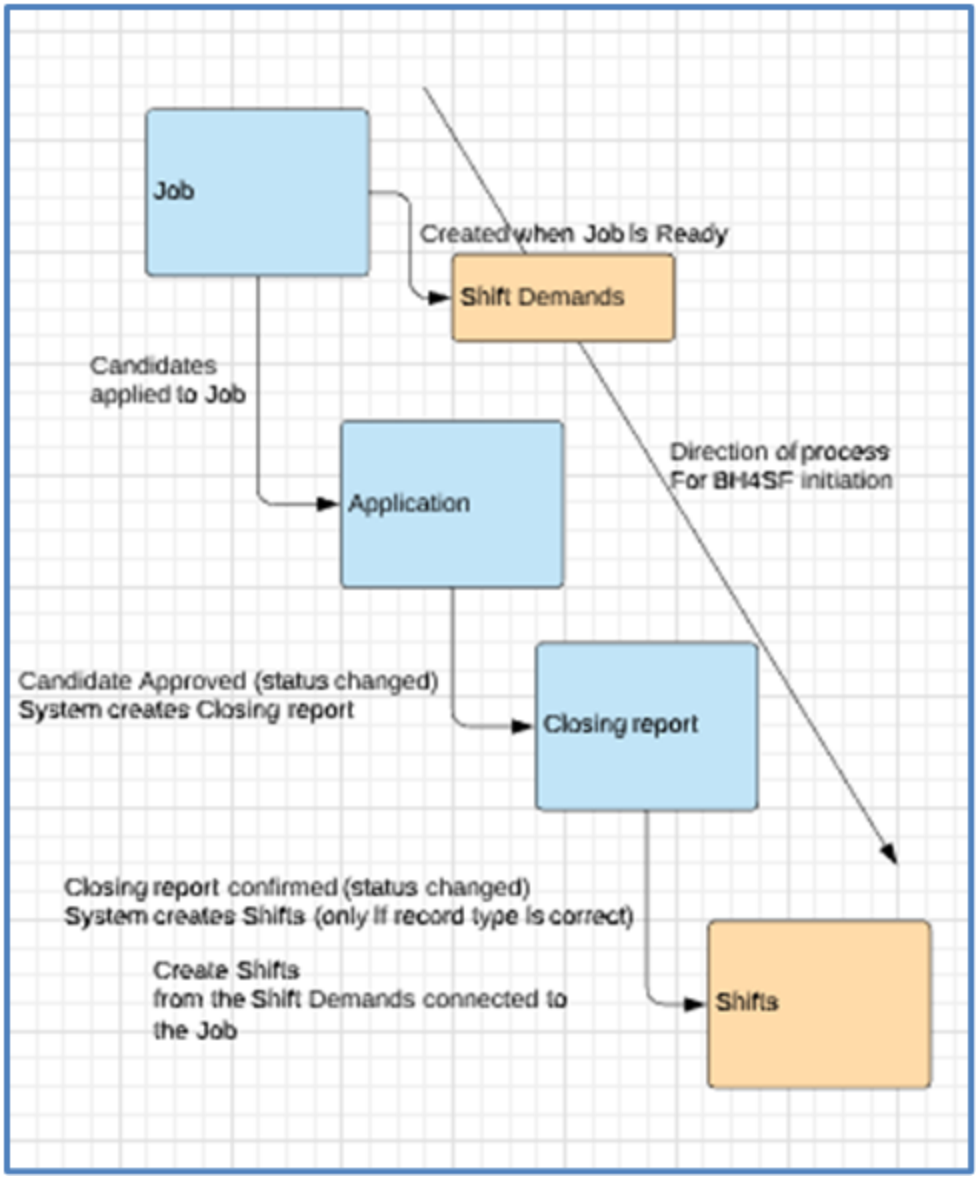

Figure 2 - Top-down Job Creation

- Create a Job and associate a Work Schedule.
- When the Job is ready the User can manually trigger the generation of Shift Demands from the Work Schedules pattern.
- (*) Optionally invoke Sirenum's search engine to find applicants to fill the Job.
- Place candidates from Sirenum's search result or manually create a Closing Report.
- The system will look at the Closing Report date information and search for existing Shift Demands connected to the Job, creating Shifts for the applicant.
- Once Shifts have been executed (the Worker started/finished the Shifts) Sirenum Timesheets are generated and may be connected to the relevant Closing Report. This is, however, outside the scope of the standard integration.

Temp Job Select Candidates from Existing Pool (Fast Fill)

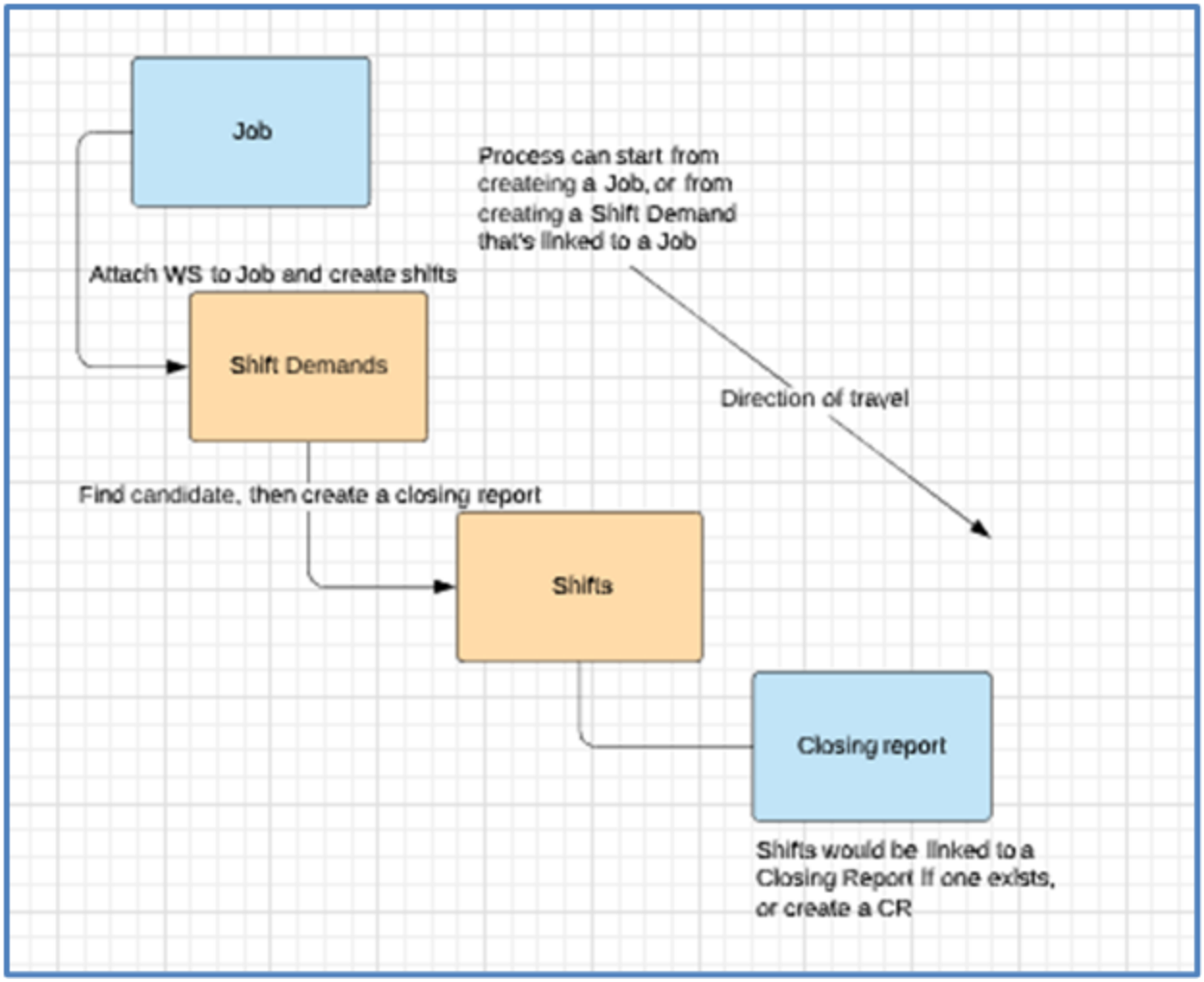

Figure 3 - Top-down or Bottom-up Job Creation with Fast Fill

This process can be used when no interviews are needed to place a worker. The Consultant:

- Create a Shift Demand via the SirenumSchedule, using existing Account, Job Role (Contract and Job Type), Site, etc.
- Selects either an existing Job or creates a new Job (with minimal details) for the Shift Demand(s).
- Place Workers (typically based on Sirenum search capabilities that themselves consider required competencies, ratings, geography, availability, etc.) using the Shift Demand(s). This creates Shifts from those Shift Demands, partially or fully fulfilling them.

At the end of this process, the integration automatically creates the required Closing Report(s) from the Auto Fulfill Shift(s), with enough information to connect the Worker assigned to the Shift(s) with the Job.

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NOTE.

- Jobs can either be Structured or Unstructured. When it is Unstructured there is no Work Schedule and the Consultant just created Shift Demand(s) against the Job through the Sirenum Schedule.

  Creating the Job, with minimal information, can be done through the Schedule e.g., when creating the first Shift Demand for that Job.

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Temp Job to use Candidates from Existing Pool and if Needed Acquire External Candidates

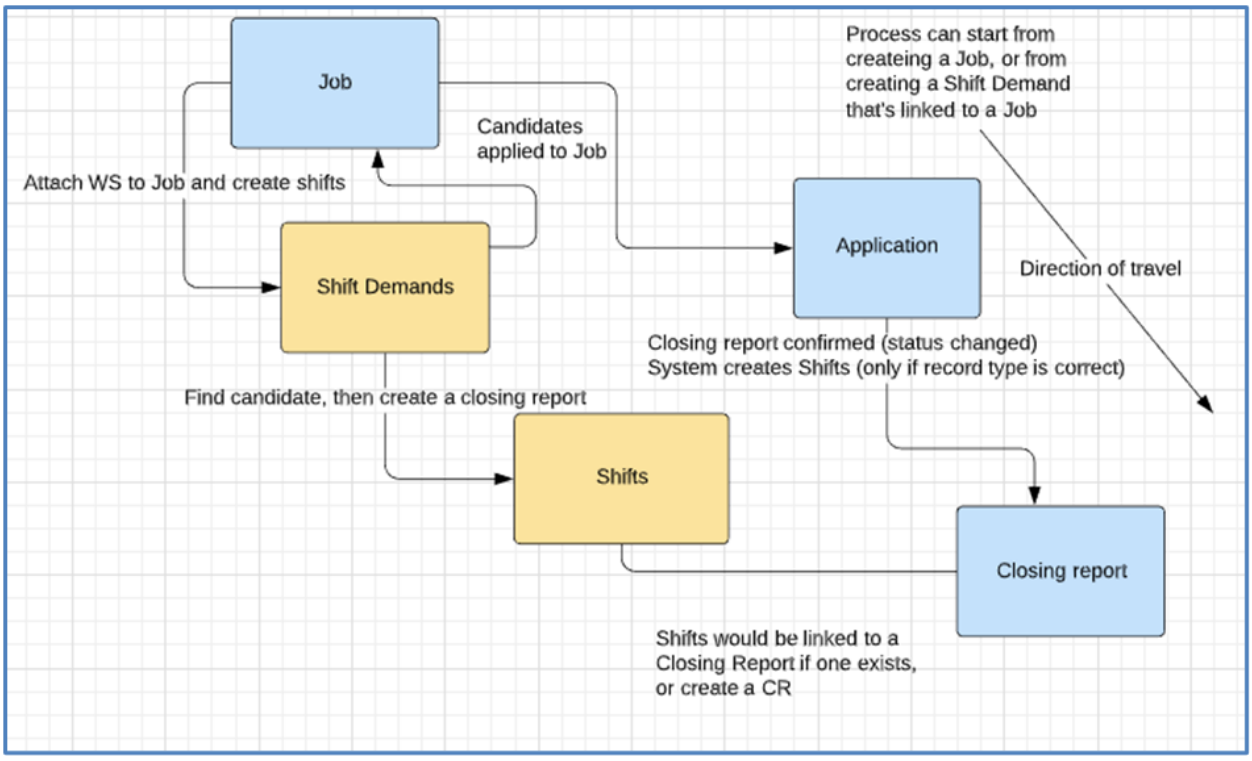


Figure 4 - Top-down or Bottom-up Job Creation with Partial Fast Fill

In this scenario the Consultant can quickly fill some of the Job's demand but not all, and must look to find additional Workers outside the existing pool of Workers.

The Consultant, either:

- Creates a new Job and manually pushes a button to generate Shift Demands.
- Creates new Shift Demands and links them to a Job (new or existing).

The Consultant:

- Searches for candidate Workers in the internal pool using the Job's Shift Demands.
- Create Shifts to place existing worker(s).
- Manually creates the Closing Report(s).

- Acquires external applicants, and creates appropriate Closing Report(s) once the interview process is complete and the Worker's profile has been populated.
- The integration looks for unfulfilled, Auto Fulfil Shift Demands for the Job and creates the appropriate Shifts for those Worker(s) with Closing Reports that are set Auto Assign.

Auto Fulfil and Auto Assign

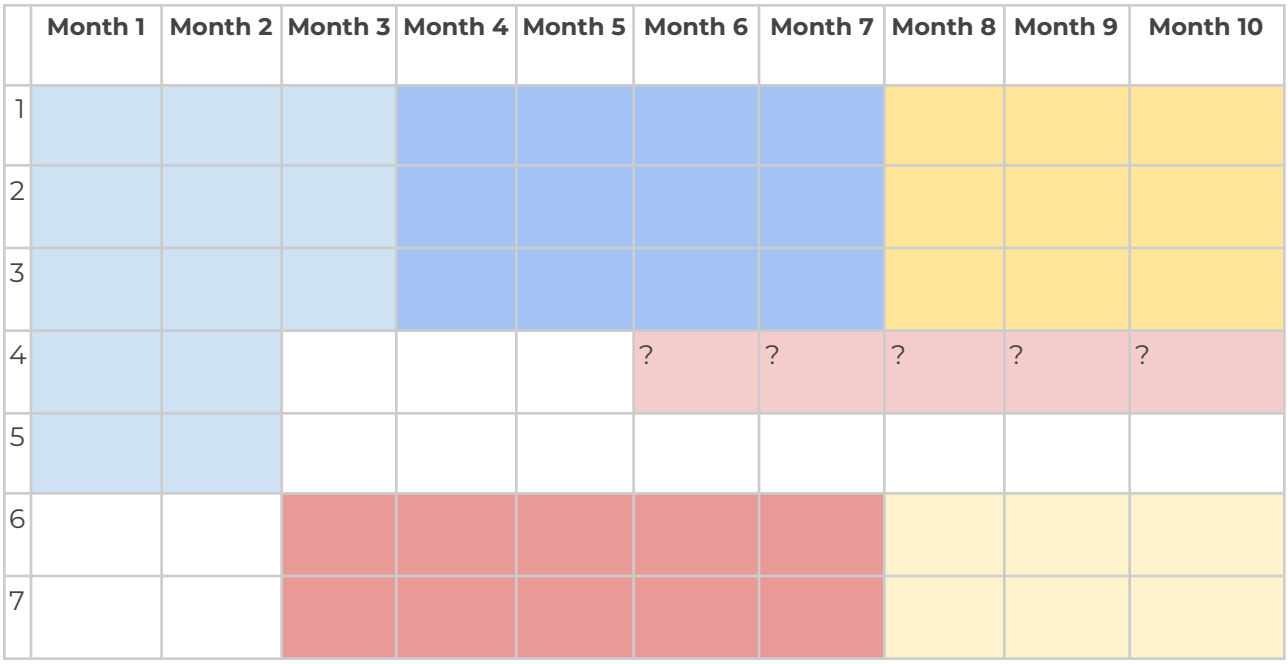
- Auto Assign on Closing Report
- Auto Fulfil on Shift Demand

These options control the automation behaviour for the integration, allowing selective application of that automation to the Shift Demands and Closing Reports for Jobs

Examples

Leavers

The following is a hypothetical example that explains how to address a multi-worker, on-going Job where one of the Workers with a Closing Report (placement) against the Job becomes unavailable.



- The Consultant has 5 Workers required for 3 months.
- Workers 4 and 4 stop working after 2 months.
- The Consultant set **Auto Assign** on their Closing Reports to False (unchecked).
- The Consultant manually cancels outstanding Shifts for Workers 4 and 5 (this could be automated in the specific implementation).
- The Worker (for the Closing Report) will not have any additional Shifts created for them from that point forward.

- At this point, the consultant has a gap in fulfilment and uses the Sirenum Search capabilities to identify two extra workers who match the Job, creating new Closing Reports for the workers 6 and 7.
- The integration automatically creates Shifts for these Workers based on the partially fulfilled Shift Demands for the Job.

Extending with Automated and Manual Shift Assignment

Continuing the Leavers example, at the end of the 3-month period the Consultant extends the end date of the job to cover an additional 3 months. However, Wednesday in the first week coincides with a shutdown and is not to be assigned to the regular workers.

	Monday	Tuesday	Wednesday	Thursday	Friday
1					
2					
3					
4					
5					

Right after the Shift Demand is generated by the system:

- The Consultant sets the Wednesday Shift Demand's **Auto Fulfil** to Fales (e.g., unchecked).
- The system does not automatically assign this Shift Demands to any workers.

Taking this approach still leaves the Shift Demand as unfulfilled and schedulable via the Sirenum Schedule.

Revision History

Date	Name	Change Comments
12th April 2022	Daryl Willett	Document rebranded