Client: The Recruitment Group

Source Date: SQL Database from Access Recruitment CRM

Target: Custom Built Spreadsheet - supplied by Matchmaker - (plus additional CSV files)

Prepared by: Stuart Bentley – Needlestack Consulting Ltd.

Date: 9th January 2023

# Introduction

The following document has been prepared by Needlestack Consulting to describe the way data should be extracted and transformed from the source database to the target output provided by Matchmaker Software. Comments within the document show where issues have been identified and decisions have bene made. It should be noted that this migration process is to be considered a partial migration, intended to get the most out of the existing data to save time when users go live with their new MatchMaker system.

* Documents will be arranged in a fixed file format as requested by MatchMaker.
* Only Applicants, Clients and Contacts are to be included
* Primary Consultants for all records will be preserved in an unused field to allow Matchmaker to make batch changes post migration.
* Jobs, Placements, Work History, Applicant Actions and Notebook items will all be EXCLUDED from this migration
* Sectorisation will be eliminated. Everybody will see every record in all brands, branches etc.

### Key

Black – Finalised , Green – Info required from Matchmaker, Red – Info required from The Recruitment Group

# CANDIDATES

## Migration Notes

The following notes were provided by the Matchmaker team. These have been considered when developing this specification.

|  |
| --- |
| 1. The file structure must not be changed in any way. Columns, their titles and order in the spreadsheet must remain exactly as supplied in this file. |
| 1. Data types must match the rules as shown below. If there is no data, then leave that field or column empty. |
| 1. Data longer than the number of characters shown in the rules below will not transfer. |
| 1. If the MatchMaker field is validated, data in that column must match the validation list in your MatchMaker database. |
| 1. The PersonIdentifier must be a unique number, used as reference only for previous system person identification. |
| 1. The PersonIdentifier is used in all import batches, so an identifier used in one batch, must not be used in future batches. |
| 1. Numbers without spaces are treated as a number and Excel will strip preceding zeros. For telephone/fax numbers, include one or more spaces in the data, eg. 0121 475 6444. 2. In several cases below, the number of available characters in the target database is smaller than those in the source database. Developers to only migrate the first “X” characters as defined in the Chars field for each column. |

## Data Metrics

There are 44,639 Applicants in the database.

## Field Mappings

| **Column** | **MatchMaker Display As** | **Type** | **Char’s** | **Validation** | **Data source (name of Excel spreadsheet column)** | **RCRM Table** | **RCRM Column** | **Notes** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| A | - | Integer | 10 |  | PersonIndentifier, Reference to previous front office person ID | Person | PersonID | This is the key field for this table |
| B | Title | Char | 4 | √ | Title | Person | TitleValueID | Translate these according to the table at [Appendix A – Title Lookups](#_Appendix_A_–) |
| C | Forename | Char | 16 |  | Forename | Person | Forename |  |
| D | Surname | Char | 20 |  | Surname | Person | Surname |  |
| E | Known as | Char | 25 |  | KnownAs. *If blank, Forename or Title Surname is entered. Specify your preference.* | Person | Salutation | If the incoming field is blank, take the forename field instead. |
| F | Address line 1 | Char | 30 |  | Address1 | Address | Building | Choose only records where the AddressTypeID = 58 |
| G | Address line 2 | Char | 30 |  | Address2 | Address | Street |
| H | Address line 3 | Char | 30 |  | Address3 | Address | District |
| I | Town | Char | 30 |  | Town | Address | City |
| J | County | Char | 25 | √ | County | Address | CountyValueID |
| K | Country | Char | 20 | √ | Country | Address | CountryValueID |
| L | Postcode | Upper | 10 |  | Postcode | Address | Postcode |
| M | Phone - home | Char | 20 |  | TelHome | Phones | Num | Only select records with CommunicationTypeID = 79 or 81 or 82. All others to be ignored. Please add a single space in front of the data . Select the most recently created record when more than one exists. |
| N | Phone - work | Char | 20 |  | TelWork | Phones | Num | Only Select records with CommunicationTypeID = 87. Please add a single space in front of the data |
| O | Phone - mobile | Char | 20 |  | TelMobile | Phones | Num | Select only CommunicationTypeID = 83. If several values exist, use only the first created. Please add a single space in front of the data |
| P | Phone - contact Tel | Char | 20 |  | TelOther | Phones | Num | Select only CommunicationTypeID = 91. NOTE – this is the Emergency Contact Telephone number  Please add a single space in front of the data |
| Q | Phone - fax | Char | 20 |  | TelFax | BLANK | BLANK | BLANK |
| R | Email | Char | 80 |  | Email | Phones | Num | Only select those with communication Types 78 or 85 for this field. All other types should be ignored. |
| S | WWW | Char | 50 |  | WWW | Phones | Num | Only Select records with CommunicationTypeID = 89 for this field. All other types to be ignored |
| T | Reg Date | Date | 10 |  | RegDate | Person | CreatedOn |  |
| U | Source | Char | 19 | √ | Source | Person | SourceID | There are 144 available choices in this list as it has been heavily over populated. TRG would have to decide which are relevant going forward. See the full list at [Appendix C – Sources](#_Appendix_C_–) |
| V | Status | Char | 15 | √ | Status. *If blank, a default status of 'LIVE' is entered.* | Applicants | StatusID | See translation below  [Appendix A – Candidate Status](#_Appendix_A_–) |
| W | Date of Birth | Date | 10 |  | DateOfBirth | Person | Dob |  |
| X | Nationality | Char | 15 | √ | Nationality | Person | NationalityID | See [Appendix E – Nationality](#_Appendix_E_–_1) for all available choices in the Source Data |
| Y | Marital Status | Char | 10 | √ | MaritalStatus | BLANK  Resolved Question | BLANK | BLANK |
| Z | Driver | Checkbox | 1 |  | DrivingLicence | BLANK | BLANK | BLANK |
| AA | Licence | Char | 23 |  | Licence | BLANK | BLANK | BLANK |
| AB | LGV Licence | Char | 23 |  | LGVLicence | BLANK | BLANK | BLANK |
| AC | Memberships | Char | 67 |  | Memberships | ApplicantConsultants | UserID | Display the UserName and Surname Separated by a Space only where the RelationshipID = 9 for Primary Consultant  Resolved Question |
| AD | Position Sought | Char | 30 |  | PosSought | Applicants | JobTitle |  |
| AE | Salary Sought | Integer | 10 |  | SalSought | Applicants | CurrSal | 2,081 records have a Minimum Basic so this has been chosen for this field. Only 874 records have a current basic value. |
| AF-AO | Classification codes | Code | 40 | √ | Code1-Code10. *Up to 10 codes per Candidate* | BLANK | BLANK | Resolved Query |
| AP | Pen Picture | Memo | 255 |  | PenPicture | ApplicantProfile | ProfileDocument |  |
| AQ | Health And Safety | Memo | 255 |  | HealthAndSafety | BLANK  Resolved Quyery | BLANK |  |
| AR | Payroll No | Char | 10 |  | PayrollNo | ApplicantEmpDetails | PayrollNo |  |
| AS | NI | Char | 13 |  | National Insurance Number. *Please Adopt the following format AA-00-00-00-A* | ApplicantEmpDetails | NINumber | Please ONLY IMPORT records in the format AA-00-00-00-A  Any others should not be imported to this field – see BANK ADDRESS BELOW |
| AT | LTDCompanyName | Char | 50 |  | Limited Company Name | ApplicantEmpDetails  Resolved Query | ClientID | Use the value in this column to look up the Company field in the Client table. Display this value on the output spreadsheet |
| AU | LTDCompanyNo | Char | 10 |  | Limited Company Number | ApplicantEmpDetails | RegNo | Obtain this value for the client matching the ClientID in column AT above |
| AV | VATCode | Char | 10 |  | VAT Code | Clients | VatNo | Obtain this value for the client matching the ClientID in column AT above |
| AW | Temp/ Perm | Char | 4 | √ | TPB |  | EmploymentTypeID | If type ID 4 exists – Select Perm  If type ID 5 Exists – Select Temp  If type ID 6 Exists – Select Temp  If several types exist – Select Both  If no types exist – leave Blank |
| AX | Bank Name | Char | 30 |  | BankName | ApplicantBanks | BankName |  |
| AY | Bank Address line 1 | Char | 30 |  | BankAddress1 | ApplicantEmpDetails | NINumber | This is a COPY of the NI number above. It is a place where we can capture all those that are not in the specified format so users can look up and add later |
| AZ | Bank Address line 2 | Char | 30 |  | BankAddress2 | BLANK | BLANK | BLANK |
| BA | Bank Address line 3 | Char | 30 |  | BankAddress3 | BLANK | BLANK | BLANK |
| BB | Bank Town | Char | 30 |  | BankTown | BLANK | BLANK | BLANK |
| BC | Bank County | Char | 25 | √ | BankCounty | BLANK | BLANK | BLANK |
| BD | Bank Country | Char | 20 | √ | BankCountry | BLANK | BLANK | BLANK |
| BE | Bank Postcode | Char | 10 |  | BankPostcode | BLANK | BLANK | BLANK |
| BF | Bank Account Name | Char | 40 |  | BankAccName | ApplicantBanks | BankAccountName |  |
| BG | Bank Account Number | Char | 8 |  | BankAccNumber | ApplicantBanks | AccountNo |  |
| BH | Bank Sort Code | Char | 8 |  | BankSortCode. *Please adopt the following format '00-00-00'* | ApplicantBanks | Sort | There is no validation in the RCRM data to make this possible. 16 characters are available so numbers could be truncated. |
| BI | Building Society No. | Char | 15 |  | BuildingSocietyNo | ApplicantBanks | BuildingSocietyRef |  |
| BJ | EmploymentType | Char | 8 | √ | Employment Type | ApplicantEmpDetails | PaymentTypeValueID | Lookup the entry in the list values table. ListID = 11 |
| BK | PaymentMethod | Char | 10 | √ | Payment Method | BLANK | BLANK | BLANK |
| BL | Notes | Memo | 255 |  | Notes | Person | Notes |  |
| BM |  |  |  |  | DoNotUse - Leave this field Blank for Internal use only. |  |  |  |

## Auto Generated Candidate Fields

Migration developers have no data to migrate to these areas so they should be ignored.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Auto-Generated Contact Fields | Type | | Characters | Validation | **Data source (name of Excel spreadsheet column)** | **RCRM Table** | **RCRM Column** | **Notes** |
| Person I.D. | | Allocated | n/a |  | *A unique database record number, allocated sequentially by MatchMaker* |  |  |  |
| Consultant | | Char | 3 | √ | *Import file will be assigned to a single chosen consultant* |  |  |  |
| Business | | Char | 15 | √ | *Consultant Assigned* |  |  |  |
| Office | | Char | 15 | √ | *Consultant Assigned* |  |  |  |
| Sector | | Char | 15 | √ | *Consultant Assigned* |  |  |  |
| Region | | Char | 15 | √ | *Generated by the Regions you have set up in MatchMaker* |  |  |  |
| Age | | Integer | 2 |  | *Calculated from Data of Birth* |  |  |  |

# COMPANIES

## Migration Notes

|  |  |
| --- | --- |
|  | 1. 1. The file structure must not be changed in any way. Columns, their titles and order in the spreadsheet must remain exactly as supplied in this file. |
|  | 1. 2. Data types must match the rules as shown below. If there is no data, then leave that field or column empty. |
|  | 1. 3. Data longer than the numbers of characters shown in the rules below will not transfer. | |  |
|  | 1. 4. If the MatchMaker field is validated, data in that column must match the validation list in your MatchMaker database. |
|  | 1. 5. The CompanyIdentifier must be a number unique to that particular company record and will be used to attach contact (person) records to their associated company. |
|  | 1. 6. The CompanyIdentifier is used in all import batches, so an identifier used in one batch, must not be used in a future batch unless that record is of the same company/address. |
|  | 1. 7. Numbers without spaces are treated as a number and Excel will strip preceding zeros. For telephone/fax numbers, include one or more spaces in the string of characters, eg. 0121 475 6444 |

## Data Metrics

There are 7,984 Clients in the database

## Field Mappings

| **Column** | **MatchMaker Display As** | **Type** | **Char’s** | **Validation** | **Data source (name of Excel spreadsheet column)** | **RCRM Table** | **RCRM Column** | **Notes** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| A | CompanyIdentifier | Integer |  |  | *See notes 5 and 6 above* | Clients | ClientID |  |
| B | Company name | Char | 50 |  | CompanyName | Clients | Company |  |
| C | Address line 1 | Char | 30 |  | Address1 | Address | Building | Only select where AddressTypeId = 57 or 61 |
| D | Address line 2 | Char | 30 |  | Address2 | Address | Street |
| E | Address line 3 | Char | 30 |  | Address3 | Address | District |
| F | Town | Char | 30 |  | Town | Address | City |
| G | County | Char | 25 | √ | County | Address | County |
| H | Country | Char | 20 | √ | Country | Address | Country |
| I | Postcode | Upper | 10 |  | Postcode | Address | Postcode |
| J | Tel No | Char | 20 |  | Tel | Phones | Num | Select only CommunicationTypeID = 79 or 81. If two exist then only type 79. If there are two of these then the most recently added should be selected. Please add a single space in front of the data |
| K | Fax No | Char | 20 |  | Fax | BLANK | BLANK | BLANK |
| L | Company email | Char | 80 |  | Email | Phones | Num | Select only CommunicationTypeId = 78. Please add a single space in front of the data |
| M | WWW | Char | 40 |  | WWW | Phones | Num | Select only CommunicationTypeId = 89. Please add a single space in front of the data. If there are several then add the most recently created |
| N | Registration date | Date | 10 |  | RegDate. *If blank, the date of import is entered* | Clients | CreatedOn |  |
| O | Source | Char | 30 | √ | Source | Clients | SourceLOOKUP | See [Appendix C – Sources](#_Appendix_C_–) below |
| P | Record updated date | Date | 10 |  | UpdatedDate | Clients | UpdatedOn |  |
| Q | Last contact date | Date | 10 |  | LastContact | NotebookITems Resolved Question | CreatedOn | Look up the NotebookItems table and establish the most recent date for ANY item that is linked to the corresponding ObjectID/PersonID. Add this date to the target spreadsheet |
| R | Status | Char | 15 | √ | Status. *If blank, a default status of 'Prospect' is entered* | Clients | StatusID | Note to TRG – this field has been over populated so careful consideration should be taken when deciding which Matchmaker status each will map to. See [Appendix G – Client Status](#_Appendix_G_–) |
| S | Status date | Char | 10 |  | StatusDate. *If blank, the date of import is entered* | Clients | StatusDate |  |
| T | Nature of business | Memo | 400 |  | NatureOfBusiness | BLANK | BLANK | BLANK |
| U | Parent record | Lookup/Char | 40 |  | Parent | BLANK  Resolved Question | BLANK |  |
| V | Subsidiary records | Lookup/Char | 40 |  | Subsidiaries | BLANK | BLANK |  |
| W | Client competitors | Lookup/Char | 40 |  | Competitors | BLANK | BLANK | BLANK |
| X | Current recruitment methods | Char | 40 |  | RecruitmentMethods | BLANK | BLANK | BLANK |
| Y | Co. Reg. No. | Char | 8 |  | CoRegNo | Clients | RegNo |  |
| Z | Yr End | Char | 10 | √ | YrEnd | BLANK | BLANK | BLANK |
| AA | Employees | Integer | 6 |  | Employees | BLANK | BLANK | BLANK |
| AB | Turnover (M) | Integer | 5 |  | Turnover(M) | BLANK | BLANK | BLANK |
| AC | Account No. | Char | 9 |  | AccountNo | BLANK | BLANK | Resolved Question |
| AD | Order No. required? | Checkbox | 1 |  | OrderNoReqd. *If 'Yes' the field is ticked, if 'No' or blank, the field is not ticked* | BLANK | BLANK | BLANK |
| AE | Credit limit | Integer | 7 |  | CreditLimit | BLANK | BLANK | BLANK |
| AF | Invoice method | Char | 12 | √ | InvoiceMethod | BLANK | BLANK | BLANK |
| AG | Payment terms | Char | 9 |  | PaymentTerms | BLANK | BLANK | BLANK |
| AH | Payment method | Char | 10 | √ | PaymentMethod | BLANK | BLANK | BLANK |
| AI | Bank reference | Char | 30 |  | BankRef | BLANK | BLANK | BLANK |
| AJ | Trade reference 1 | Char | 30 |  | TradeRef1 | BLANK | BLANK | BLANK |
| AK | Trade reference 2 | Char | 30 |  | TradeRef2 | BLANK | BLANK | BLANK |
| AL - BE | Classification codes | Code | 40 | √ | Code1-Code20. *Up to 20 codes per company record* | BLANK | BLANK | BLANK |
| BF | Comments | Memo | 255 |  | CompanyComments | Clients | Notes |  |

## Auto-Generated Company Fields

| **Auto-Generated Company Fields** | **Type** | **Characters** | **Validation** | **Notes** |
| --- | --- | --- | --- | --- |
| Web identity | Char | 50 |  | *Copied from the Company name field* |
| Region | Char | 15 | √ | *Generated by the regions you have set up in MatchMaker* |
| Client I.D. | Allocated | n/a |  | *A unique database record number, allocated sequentially by MatchMaker* |
| Consultant | Char | 3 | √ | *The import program will prompt for the owner of all records in that batch* |
| Business | Char | 15 | √ | *Taken from the Consultant's MatchMaker profile* |
| Office | Char | 15 | √ | *Taken from the Consultant's MatchMaker profile* |
| Sector | Char | 15 | √ | *Taken from the Consultant's MatchMaker profile* |

# CONTACTS

## Data Metrics

There are 10,811 Contacts in the database

## Field Mappings

| **Column** | **MatchMaker Display As** | **Type** | **Characters** | **Validation** | **Data source (name of Excel spreadsheet column)** | **RCRM Table** | **RCRM Column** | **Notes** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| BG | Title | Char | 4 | √ | PerTitle | Person | TitleDescriptionID | Examples should be Mr, Mrs Ms etc. |
| BH | Forename | Char | 16 |  | PerForename | Person | Forename |  |
| BI | Surname | Char | 20 |  | PerSurname | Person | Surname |  |
| BJ | Known as | Char | 25 |  | PerKnownAs. *If blank, Title Surname is entered, eg, Mrs Jones* | Person | Salutation | If the incoming field is blank, take the forename field instead. |
| BK | Position | Char | 50 |  | PerPosition | ClientContacts | JobTitle |  |
| BL | Category | Char | 3 | √ | PerCategory | ClientContacts | ContactTypeID | See [Appendix J - Contact Type](#_Appendix_J_-) for translations. |
| BM | Tel - Work | Char | 20 |  | PerTelWork. *If blank, this is copied from the equivalent field in the Company record* | Phones | Num | Select only CommunicationTypeID = 79. If several values exist, use only the first created. Please add a single space in front of the data. |
| BN | Tel - Work 2 | Char | 20 |  | PerTelWork 2 | Phones | Num | Select only CommunicationTypeID = 81. If several values exist, use only the first created. Please add a single space in front of the data. |
| BO | Tel - Home | Char | 20 |  | PerTelHome | Phones | Num | Select only CommunicationTypeID = 88. If several values exist, use only the first created. Please add a single space in front of the data. |
| BP | Tel - Fax | Char | 20 |  | PerTelFax. *If blank, this is copied from the equivalent field in the Company record* | BLANK | BLANK | BLANK |
| BQ | Tel - Mobile | Char | 20 |  | PerTelMobile | Phones | Num | Select only CommunicationTypeID = 83. If several values exist, use only the first created. Please add a single space in front of the data. |
| BR | Email - Work | Char | 80 |  | PerEmailWork | Phones | Num | Select only CommunicationTypeID = 85. If several values exist, use only the first created. |
| BS | Email - Home | Char | 80 |  | PerEmailHome | Phones | Num | Select only CommunicationTypeID = 86. If several values exist, use only the first created. |
| BT | Comments | Char | 38 |  | PerComments | Person | Notes |  |
| BU |  |  |  |  | DoNotUse - Leave this field blank for Internal use only. | BLANK | BLANK | BLANK |

## Auto-Generated Contact Fields

Migration developers have no data to migrate to these areas so they should be ignored.

| Field | Type | Characters | Validation | *Notes* |
| --- | --- | --- | --- | --- |
| Person I.D. | Allocated | n/a |  | *A unique database record number, allocated sequentially by MatchMaker* |
| Consultant | Char | 3 | √ | *Copied from the equivalent field in the Company record* |
| Business | Char | 15 | √ | *Copied from the equivalent field in the Company record* |
| Office | Char | 15 | √ | *Copied from the equivalent field in the Company record* |
| Sector | Char | 15 | √ | *Copied from the equivalent field in the Company record* |
| Contact | Checkbox | 1 |  | *This field is ticked* |
| Candidate | Checkbox | 1 |  | *This field is unticked.* |
| Source | Checkbox | 1 |  | *This field is unticked.* |
| Account No. | Char | 16 |  | *Copied from the equivalent field in the Company record* |
| Company name | Char | 50 |  | *Copied from the equivalent field in the Company record* |
| Address line 1 | Char | 30 |  | *Copied from the equivalent field in the Company record* |
| Address line 2 | Char | 30 |  | *Copied from the equivalent field in the Company record* |
| Address line 3 | Char | 30 |  | *Copied from the equivalent field in the Company record* |
| Town | Char | 30 |  | *Copied from the equivalent field in the Company record* |
| County | Char | 25 | √ | *Copied from the equivalent field in the Company record* |
| Country | Char | 20 | √ | *Copied from the equivalent field in the Company record* |
| Postcode | Upper | 10 |  | *Copied from the equivalent field in the Company record* |

# Stored Documents & CV’s

## Migration notes

In RCRM, CV’s and stored documents are in two separate places. The following tables should be used as sources for migration

**Dbo.CV** links the individual applicants to each CVID using the ApplicantID = Person ID. There will often be several CVs linked to a candidate including an original and a “Client ready” formatted CV. Note that any Row where Publish is marked “Y” is a formatted “Client ready “ CV. These require to be clearly marked in the file name by adding the word “Formatted” in the document name.

**Dbo.CVContents** Contains the actual CV documents using the CVId as the common link to the above CV table.

**Dbo.Templates** Contains links to the documents and the related candidate. The ObjectID should equal the person ID to link the correct documents to the correct candidate. Note that each row will have a value in the TemplateTypeId Colum.

**Dbo.TemplateDocument** Contains the actually documents themselves using the TemplateID as a common link to the Templates table.

**Dbo.TemplateTypes**  See [Appendix H – Document /Template Types](#_Appendix_H_–) for a full list of these

## Extraction Instructions

Developers should extract all documents to a file structure as below

Table

Description automatically generated

All file names should be preserved using the TemplateName column as a base.

The Abbreviated text value in [Appendix H – Document /Template Types](#_Appendix_H_–) matching the TemplateTypeID, should be added to the front of the template name, followed by one space to separate the Original TemplateName. This is to identify the document type when it is viewed in the targets database. It is understood the Matchmaker developers will NOT use this information to properly classify each document type according to the text in the file name. but Recruitment Group staff will reclassify documents manually as required

Example CV File Name: CV James Bond

Example Document filename: Identity James Bond App pack

## Data Metrics

|  |  |
| --- | --- |
| Table | Row Count |
| CV | 16,959 |
| CVContents | 16,956 |
| Templates | 46,862 |
| TemplateDocuments | 46,813 |

## Other Documents

There are also documents stored in the database in the dbo.documents table.

There are 1,475,920 documents in the database. 99% of these (1,470,490) were created after 1st October 2021 so there is no benefit to cut this down by date if that is the suggested cut off point.

Extension Analysis (most popular only)

|  |  |
| --- | --- |
| Extension | Quantity |
| .PNG | 1,276,023 |
| .Doc | 4,488 |
| .DocX | 23,148 |
| .PDF | 34,833 |
| .JPG | 99,474 |
| .gif | 11,647 |
| .XLS | 2,216 |

Almost 200,000 of these documents are .png files related to notebook entries and so may well be email signatures etc. There is little or no point extracting these

Extracting this data to each relevant candidate could prove tricky so lets leave it behind for this migration.

# Contact History

Notebook items for Applicants, Clients and Contacts need to be extracted but NOT migrated to Matchmaker. This is to provide a backup data source if there is a query regarding past communication with the business. The Recruitment Group will maintain this themselves, so this scope is merely to extract the following tables as individual CSV files with all columns exported in the same format and order as they exist in the source SQL data.

* Objects
* Person
* Clients
* ClientContacts
* NotebookItems
* NotebookItemContent
* NotebookLinks
* NotebookTypes
* NotebookLinkTypes
* Users

# Appendix A – Title Lookups

Titles are available from the Listvalues Table in source data. List ID = 2

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **ListvalueID** | **Description** | **Matchmaker Title Ref** | **Description** | **Notes** |
| 4 | Mr |  | Mr |  |
| 9 | Mrs |  | Mrs |  |
| 419 | Dr |  | Dr |  |
| 420 | Miss |  | Miss |  |
| 423 | Ms |  | Ms |  |
| 839 | MIS |  | Miss |  |
| 840 | MX |  | Ms |  |
| 967 | Prof. |  | Prof. |  |

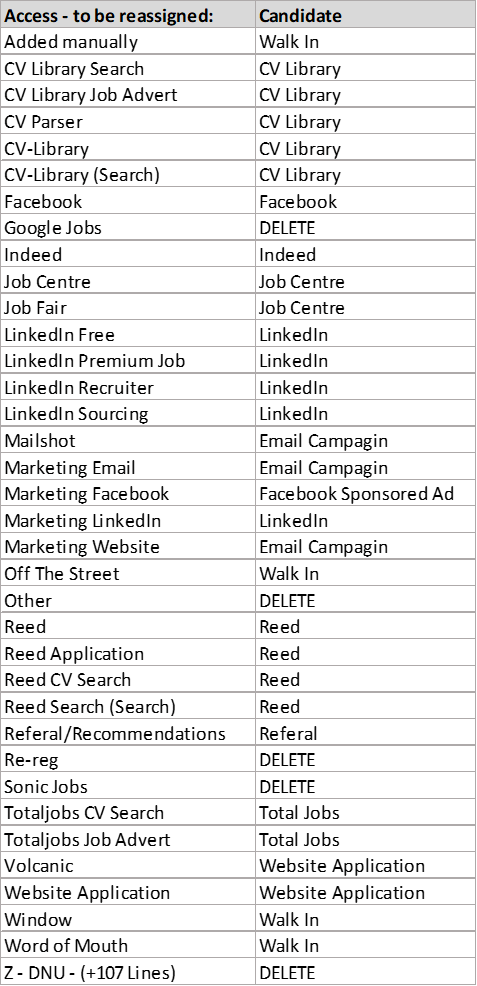
# Appendix B – Candidate Status

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **RCRM ID** | **Description** | **Matchmaker Status ID** | **Description** | **Notes** |
| 49 | Live |  | Live |  |
| 50 | Dormant |  | Live |  |
| 51 | Placed (Perm) |  | Placed |  |
| 52 | Hold |  | Do Not Use |  |
| 53 | New |  | Pre-Reg |  |
| 54 | DO NOT USE |  | Do Not Use |  |
| 55 | Working for us (Temp) |  | Placed |  |
| 56 | FOJ (Found own Job) |  | Found Own Job |  |

# Appendix C – Candidate Sources

|  |  |  |  |
| --- | --- | --- | --- |
| Table  Description automatically generated with medium confidence |  |  |  |

Any Sources containing *Z – DNU –* can be removed and left blank (there was 107 of these)



# Appendix D – Employment Types

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **RCRM Employment Type ID** | **Description** | **Matchmaker Reference** | **Description** | **Notes** |
| 4 | Permanent |  | Perm |  |
| 5 | Temporary |  | Temp |  |
| 6 | Contract |  | Temp |  |

# Appendix E – Nationality

The following Nationality list values exist in source.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **RCRM Nationality** |  |  |  |  |
|  |  |  |  |  |

Please only migrate any records with more than ZERO entries using either the existing list value OR the translation provided below

|  |  |
| --- | --- |
|  |  |
|  |  |
|  |  |

# Appendix F – Payment Types

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **RCRM ListValueID** | **Description** | **Matchmaker Reference** | **Description** | **Notes** |
| 24 | PAYE | PAYE |  |  |
| 25 | Limited Company Contractor | Ltd Cont. |  |  |
| 440 | Umbrella Company | E.Thomas |  |  |
| 441 | Contract of Employment | DELETE (zero records) |  |  |
| 688 | Off Payroll | DELETE (2 records) |  |  |
| 712 | CIS Scheme | DELETE (zero records) |  |  |
| 974 | Umbrella CIS | DELETE (zero records) |  |  |

# Appendix G – Client Status

| **RCRM ClientStatusID** | **Description** | **Matchmaker Reference** | **Description** | **Notes** |
| --- | --- | --- | --- | --- |
| 27 | Active | Active |  |  |
| 28 | On Hold | On Stop |  |  |
| 29 | Non Client | Archive |  |  |
| 30 | Prospect | Prospect |  |  |
| 31 | Umbrella | DELETE (zero records) |  |  |
| 32 | Ltd Company | Ltd Comp |  |  |
| 33 | CIS | DELETE (zero records) |  |  |
| 34 | NB - DO NOT USE | DELETE (zero records) |  |  |
| 35 | O – DO NOT USE | DELETE (zero records) |  |  |
| 36 | DE – DO NOT USE | DELETE (zero records) |  |  |
| 37 | CL - DO NOT USE | DELETE (zero records) |  |  |
| 38 | H - DO NOT USE | DELETE (zero records) |  |  |
| 39 | A - DO NOT USE | DELETE (zero records) |  |  |
| 40 | DO NOT USE | Archive |  |  |
| 41 | P - DO NOT USE | DELETE (zero records) |  |  |
| 42 | CC - DO NOT USE | DELETE (zero records) |  |  |
| 43 | LB - DO NOT USE | DELETE (zero records) |  |  |
| 44 | R - DO NOT USE | DELETE (zero records) |  |  |
| 45 | C - DO NOT USE | DELETE (zero records) |  |  |
| 46 | NC - DO NOT USE | DELETE (zero records) |  |  |
| 47 | B - DO NOT USE | DELETE (zero records) |  |  |
| 48 | Dormant | On Stop |  |  |

# Appendix H – Document /Template Types

|  |  |  |
| --- | --- | --- |
| **TemplateTypeId** | **TemplateTypeName** | **Abbreviated Text** |
| 3 | Standard Templates | Standard |
| 15 | Job Description Templates | JD |
| 20 | TOB Clients Templates | TOB |
| 21 | Fax | FAX |
| 22 | CV Templates | CV |
| 23 | Reference Templates | Reference |
| 24 | AWR Templates | AWR |
| 25 | Placement Documentation | Placements |
| 26 | Notebook Templates | Notebook |
| 27 | Identity Documents | Identity |
| 28 | Banking Details | Banking |
| 29 | Accounts Confirmation | Accounts |
| 30 | Personal Details Form | Personal |
| 31 | Screening Background Check | Screening |
| 32 | Visit Report | Visit |
| 33 | Worker Assignment Schedules | Schedule |
| 34 | Imported Document | Imported |
| 35 | Quote Template | Quote |
| 36 | Passport | Passport |
| 39 | Visa | Visa |
| 40 | ID Card | ID Card |
| 41 | Settled Status | Settled |
| 42 | Pre-Settled Status | Pre-Settled |
| 43 | Contract for Services | Contract |
| 44 | FMCG - APPLIED SETTLED STATUS |  |
| 45 | FMCG - N I PROOF |  |
| 46 | FMCG - KID DOCUMENT |  |
| 47 | FMCG - APPLICATION FORM |  |
| 49 | FMCG - GREENVALE WAS |  |
| 55 | FMCG - BIRTH CERTIFICATE |  |
| 56 | FMCG - CHAMPION |  |
| 59 | FMCG - EMAIL |  |
| 60 | FMCG - SICK NOTE |  |
| 61 | FMCG - INDUCTION |  |
| 64 | GDPR | GDPR |
| 65 | REUSE - Marriage Certificate | Reuse |
| 68 | Client Forms - External | Client\_External |
| 69 | REUSE - Worker Assignment Schedule Email | Reuse\_WAS |
| 73 | Contracts | Contracts |
| 78 | Applicant Forms/Documentation | Form |
| 83 | DocuSign Signed Document | Signed |
| 84 | Payroll New Starters | Payroll |
| 85 | Client Forms - Internal | Client\_Internal |
| 86 | Client Perm Placement Confirmation | Client\_Perm\_Conf |

# Appendix I - Client Source

| **Access - to be reassigned:** | **Client** |  | **Access - to be reassigned:** | **Client** |
| --- | --- | --- | --- | --- |
| Added manually | Branch |  | Marketing LinkedIn | DELETE |
| CV Library Search | Job Board Search |  | Marketing Website | DELETE |
| CV Library Job Advert | Job Board Search |  | Off The Street | Branch |
| CV Parser | Branch |  | Other | Branch |
| CV-Library | Job Board Search |  | Reed | Job Board Search |
| CV-Library (Search) | Job Board Search |  | Reed Application | DELETE |
| Facebook | Social Media |  | Reed CV Search | DELETE |
| Google Jobs | Job Board Search |  | Reed Search (Search) | Job Board Search |
| Indeed | Job Board Search |  | Referal/Recommendations | Branch |
| Job Centre | DELETE |  | Re-reg | DELETE |
| Job Fair | DELETE |  | Sonic Jobs | Job Board Search |
| LinkedIn Free | Social Media |  | Totaljobs CV Search | DELETE |
| LinkedIn Premium Job | Social Media |  | Totaljobs Job Advert | DELETE |
| LinkedIn Recruiter | Social Media |  | Volcanic | Website Enquiry |
| LinkedIn Sourcing | Social Media |  | Website Application | Website Enquiry |
| Mailshot | DELETE |  | Window | Branch |
| Marketing Email | DELETE |  | Word of Mouth | Branch |
| Marketing Facebook | Social Media |  | Z - DNU - (+107 Lines) | DELETE |

# Appendix J - Contact Type

|  |  |
| --- | --- |
| **Access - to be reassigned:** |  |
| Director | Dir |
| HR Director | Dir |
| Manager | Mgr |
| Timesheet Authoriser | Emp |
| Employee | Emp |
| Hiring Manager | Mgr |
| invoice Contact | Emp |
| Sales Director | Dir |
| Supervisor | Sup |
| Unknown | Emp |