



IBM Kenexa® TalentSuite® BrassRing New User Fundamentals -
Responsive

User Guide

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Edition Notice

Note: Before using this information and the product it supports, read the information in Notices.

This edition applies to IBM® Kenexa® New User Fundamentals for BrassRing on Cloud User Guide and to all subsequent releases and modifications until otherwise indicated in new editions.

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Introduction

Welcome to New User Fundamentals for BrassRing and Talent Gateways on Talent Suite

About This Course

This course and workbook provide an introductory walk-through of BrassRing from the perspective of “A Day in the Life of a Recruiter.” You will work with reqs, organize your folders, search for candidates, and track candidates through your hiring process. You will find tips for navigating successfully and shortcuts for working more efficiently with BrassRing.

BrassRing is a highly customizable Talent Management solution. Req, forms, and HR Actions are some of the tools that were customized for your company’s process. It is likely that the examples in this workbook will look a little different from your company’s own BrassRing site.

About BrassRing Training

This course is the first step in becoming proficient using BrassRing’s Talent Management solutions. We encourage you to take advantage of online Help available within BrassRing as well as pursue additional training opportunities. BrassRing Education Services offers a number of tools including instructor-led and self-study courses which will help support your company’s specific learning needs.

Chapter 1: Getting Started

Chapter Overview:

Before we start creating reqs and managing candidates, it is important to dedicate time to some basics. BrassRing is a Web-based application. In other words, it is accessed from a Web browser and run over the Internet.

This first chapter focuses on accessing, logging in to, and basic navigation within BrassRing through your Talent Suite site.

Objectives:

At the end of this chapter you will be able to:

- Log in to BrassRing from Talent Suite.
- Check your browser settings.
- Navigate through BrassRing.

Accessing and Logging in to BrassRing

Accessing BrassRing is similar to accessing any site on the Internet. You simply type in the web address and the browser takes you to your requested destination.

Your organization actually has two BrassRing sites: one used exclusively for testing and training called a staging site and one for real, day-to-day recruiting called a production site.

Complete the addresses for your Talent Suite sites here:

The **staging site URL**, used for training and testing only is:

`https://2x-staging.kenexa.com/wps/portal/$tenant/CLIENTID/SWF/login`

The **production site URL** for actual, day-to-day recruiting is:

`https://2x.kenexa.com/wps/portal/$tenant/CLIENTID/SWF/login`

Note: The CLIENTID in the URL is what is unique to your organization.

Accessing Talent Suite

1. Launch your browser and enter your company's unique address as shown in Figure 1-1.
2. Press Enter on your keyboard. This takes you to the Talent Suite log in page where you will enter your username and password. See Figure 1-2.





Figure 1- 1: Entering your Talent Suite address

A screenshot of the Talent Suite login page. The page has a title "Login". Below the title are two input fields: "User name:" and "Password:". Below the "Password:" field is a "Login" button. At the bottom of the form is a link that says "Forgot password?".

Figure 1- 2: Talent Suite log in page

Password Protection


Your company may have decided to apply certain password protection options to Talent Suite.

-  **For training, you will always log in to your company's staging site.**
-  **It is best practice to click the Forgot password link on the log in page if you have unsuccessfully attempted to log in to BrassRing twice. This will prevent you from being locked out, as you will be able to reset your password via the e-mail you will receive. Note: This does not apply if you use Single-Sign-On (SSO).**

Forgot Password?

If you have forgotten your password, the only way to regain access to your account is by clicking the link marked Forgot Password? This link is found on the Talent Suite log in page. Refer to Figure 1-2. To reset your password:

1. Click the Forgot password? link (see Figure 1-2), and enter your username.
2. Open the Password Recovery e-mail you receive.
3. Use the link marked "Click here to reset your password" to create a new password.

-  **IBM cannot provide user names or passwords. Should you forget your password, please use the Forgot Password? link on the log in page to reset your password. If you need your username, please contact your system admin (Super User).**

Preparing to Use BrassRing within Talent Suite

To take maximum advantage of BrassRing, do a quick check to ensure that your computer and browser are configured with the appropriate desktop and browser settings. If attempts to use BrassRing are troublesome, you are encouraged to first walk through these steps prior to seeking additional help.

Desktop Configuration

To confirm your desktop configuration:

1. From your computer's desktop, click the right mouse button (right-click) anywhere on the page and select Properties.
2. Click the Settings tab.
3. Select 256 colors or greater and 1024 x 768 pixels. Note: If your computer does not support this setting, then select 800 x 600.

4. Click Apply.
5. Click OK.

Connection to the Internet

		Internet Explorer	Firefox	Safari	Chrome	Mobile Devices
		9 [±]	11	38ESR+/47+ [±]	5-6 ⁷	52+ [±]
IBM® Kenexa® BrassRing® (includes Event Manager)		●	●	●	●	●
5	IE 8, 9, and 10 are no longer supported by Microsoft, since January, 2016. In accordance with Microsoft's published changes to their support model for IE browser, as of January 12, 2016, BrassRing will support only the latest version as follows: <ul style="list-style-type: none"> • IE11 running on Windows 7 SP1, Windows 8.1, Windows 10. Microsoft Announcement: https://support.microsoft.com/en-us/gp/microsoft-internet-explorer					
6	BrassRing is also supported on Firefox 9+ for Linux. For Windows and OS X (Apple) systems, Firefox browser should have the most recent version with all necessary security patches per automatic updates (enabled by default on installation), unless users are on Firefox "ESR" (Extended Service Release), in which case, they should be on the latest ESR version with all point releases installed.					
7	Safari 6+ is only available on Macintosh computers. Windows support extends up to Safari 5.					
8	For Windows and OS X (Apple) systems, Chrome browser should have the most recent version with all necessary security patches per automatic updates (enabled by default on installation).					

Table 1-1: Browser Compatibility

More details about Supported Browsers can be found at:

<http://www-01.ibm.com/support/entdocview.wss?uid=swg21684469>

- **Because BrassRing is a Windows-based application, please make sure to turn off your browser's pop-up blocker for your BrassRing site.**
- **Your desktop may already be set up properly with colors; however pixel size can be edited to allow for proper text size within BrassRing. This will address an unnecessary scrolling up and down to read text appearing on a page.**

Clearing Your Cache

Your browser's cache stores the contents of all the Web page addresses that you have visited during a session. To ensure that you have the most updated information within BrassRing, follow the steps noted below.

Clearing Your Cache – Internet Explorer

Have you ever clicked a link to a website and found that the page did not load completely? Perhaps graphics failed to appear or the page seems to be frozen?

Your browser retains within its memory, or cache, all the different pages you hit when navigating through different web sites. The aforementioned issues are symptomatic of your cache being full. By taking a minute

to clear your cache once a week, you ensure pages both within *BrassRing* and other web sites load properly.

To clear the cache for Internet Explorer (may vary depending on the version of your IE Explorer):

1. From the Internet Explorer menu bar, click **Tools * Internet Options**.
2. Click the **General** tab.
3. Under Browsing history, click **Delete**.
4. Click **OK**.

Clearing Your Cache – Firefox

To clear the cache for Firefox:

1. Open the Firefox browser and navigate to the Tools menu (for Windows users) or the Firefox menu (for Mac users).
2. View the drop-down menu display and choose Options (for Windows) or Preferences (for Macs). A new dialog box will appear.
3. Click the Privacy icon to get to the cache options. Now you can click the 'Clear Now' button.
4. A drop-down box will appear with numerous checkable boxes. Check Cache and press the Clear Private Data Now button.
5. Press the OK button (Windows) or simply close the preferences box (Mac). Your cache will now be clear.

■ If your cache is not clearing properly, you may not see database updates that you made a few minutes before, or your forms may not display properly.

Navigating within BrassRing

Now that we discussed the set-up of your computer and browser, we will briefly review the user type access within BrassRing.

User Types

User types define the functions that one has access to within BrassRing, assigned in accordance with the roles and responsibilities of those individuals using BrassRing within your company. BrassRing administrators, sometimes referred to as Super Users, designate these user types. Because of this, there may be features included in this workbook to which you do not have access.

BrassRing Homepage

The BrassRing Homepage is mobile responsive with a landing portal that improves your work experience. This section provides a brief overview of how to navigate to the BrassRing section of Talent Suite, as well as what is common within each area you can access from the Homepage portal itself.

Once you log-on to Talent Suite, click the following Hiring icon to access BrassRing.



The BrassRing Homepage appears (Figure 1-3).

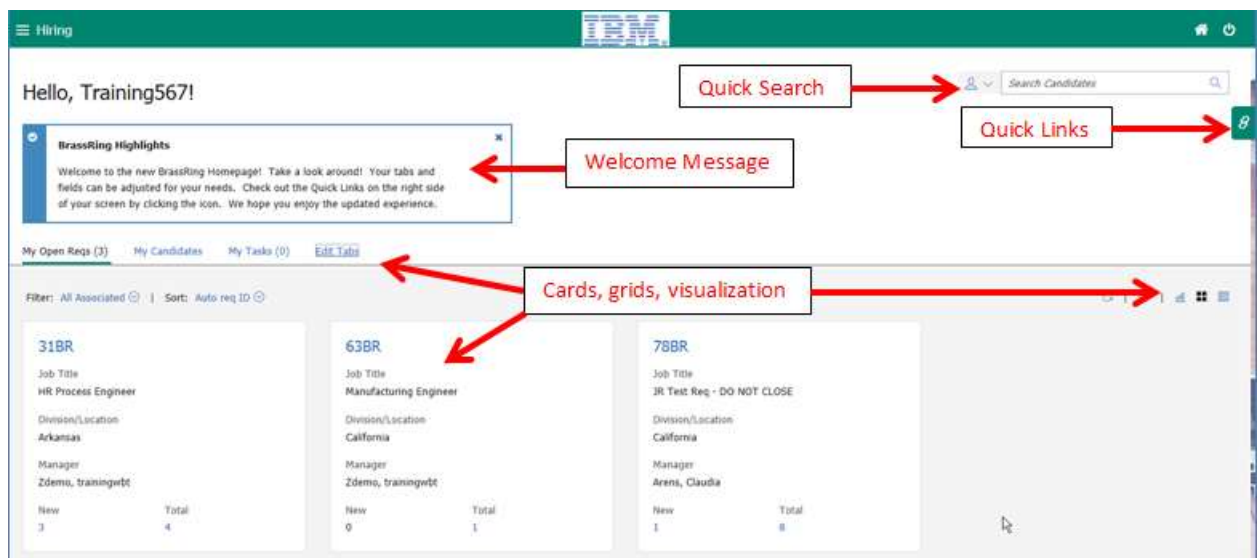


Figure 1- 3: BrassRing Homepage

Persona Groups

The Homepage is designed to display cards, grids, visualizations, and welcome messages specific to five different personas:

- Recruiter
- Hiring Manager
- Administrator
- HR User
- Reporting / Analytics

The BrassRing Homepage user experience is based on persona designation. Each persona will provide the users with the view of the data that works best for them. Users can personalize the view of the homepage depending on their day-to-day tasks and needs.

Additional Elements to Consider:

- The HR Status Categories must be mapped in order for visualizations to work on the Homepage and within the req folders.
- Based on configuration and appropriate privileges, the homepage for users with recruiter persona displays information specific to their requisitions in individual containers. The containers come with multiple view options as well as the provisions to refresh and update data in them.
- Users can switch to grid view and to visualizations (Figure 1-4) that provide pictorial representation of the data about time to fill and req aging.
- You may add up to 20 fields for display in the My Open Reqs grid views.

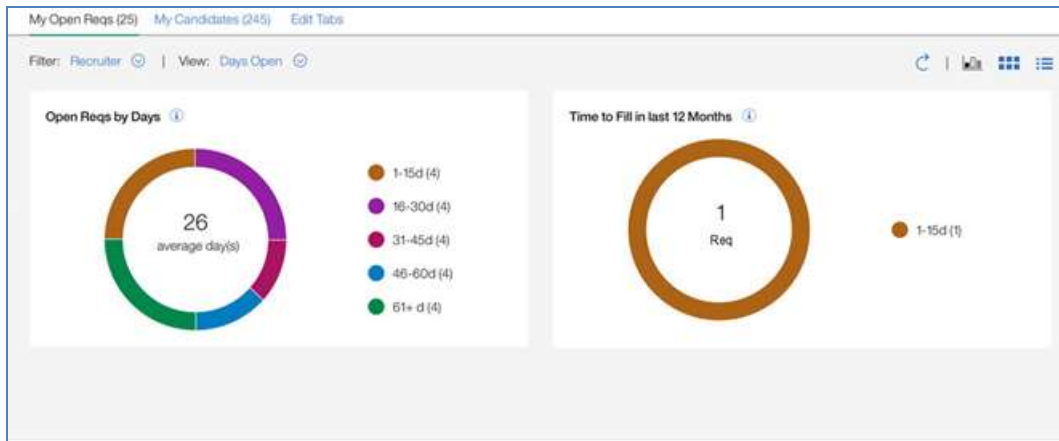


Figure 1- 4: BrassRing Homepage

The overall view defaults to My Reqs and the Card View by personas are as follows:

- **Recruiter** – Req #, Job Title, Location, Department, Posting icon, New, and Total Candidates.
- **Hiring Manager** – Req #, Job Title, Location, Department, Recruiter, New, and Total Candidates.

Note: Currently, your Workbench administrator can configure different default fields for the My Open Reqs card and grid views, and the My Candidates grid view which will only apply to any new users to BrassRing. The Recruiter persona is used for the remainder personas which will be updated with persona-specific configuration in future Releases.

A quick view of information can be found under the following links:

- My Open Reqs – details about open reqs for which the user has a ‘My’ relationship.
- My Candidates – details about candidates who applied to My Open Reqs.
- My Tasks – pending approvals of req and/or candidate form; users open the tasks tab to complete their tasks right from the homepage. Refer to Figure 1-5.

Note: Edit Tabs allows each user to select what view of links they prefer to show on their homepage. Refer to Figure 1-6.

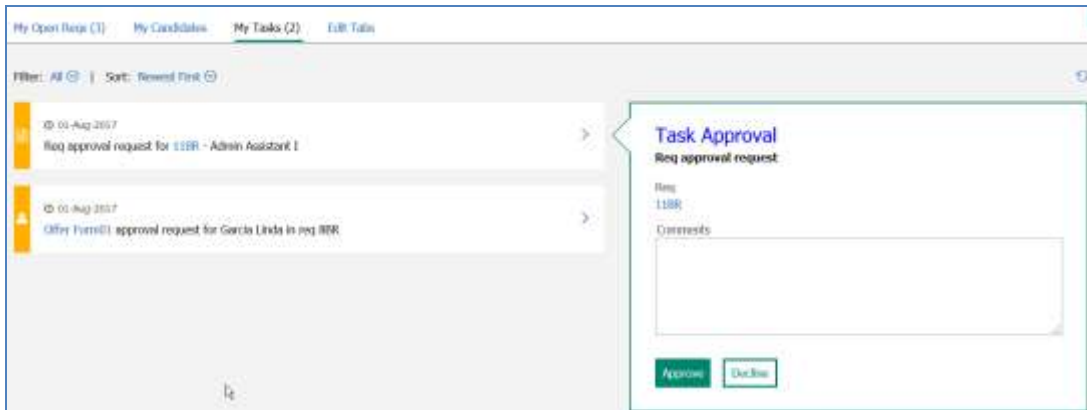


Figure 1-5: My Tasks



Figure 1-6: Edit Tabs

Quick Search

Quick Search is available on the Homepage as well as other internal pages in BrassRing. You can quickly search for candidates, reqs, or candidates in reqs. Refer to Figure 1-7.

To run a Quick Search:



1. Select the type of search by clicking on the drop-down arrow icon .
2. Depending on the type of quick search you want to complete, you enter the Candidate name, Req ID, or Candidate name within specific Req in the search field.
3. Click the Search icon .




Figure 1-7: Quick Search

Welcome Message

Two welcome message can be presented to the users on the homepage: client message and IBM message. The client message is customizable by the Administrator to include important internal company updates. The IBM message is a system message that may include details about releases, maintenance, etc. Clients have the option to turn-off either one or both of the messages. Homepage administration allows you to configure the client messages and associate each message with one or multiple personas. For example, if a client wants recruiters to take a specific action, the message can be configured and only displayed for the recruiter persona.

When users read the message and select **X** to close the message, the message is dismissed and no longer displays. If either message is updated the next time the BrassRing user logs-into BrassRing, the new message displays.

Quick Links

The Quick Links panel provides links to external or internal websites. Refer to Figure 1-8. Your user type access defines what hyperlinks are defaulted for you. To access the Quick Links panel, click on the Quick Links icon . Each user can use the Edit Links button to add additional links to the Quick Links panel. Note: The Quick Links panel is accessible from the Homepage as well as other internal pages.

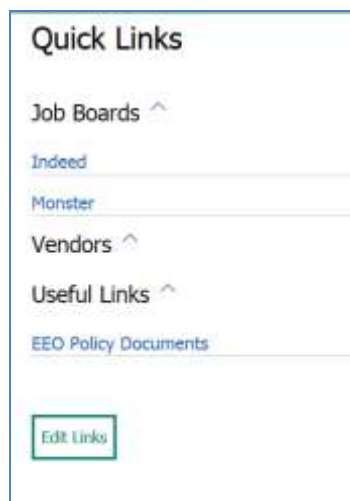








Figure 1-8: Quick Links

The following table describes the icons and links available on the Hiring Navigation icon .

Icon or Link	Description
 Hiring	<ul style="list-style-type: none"> • Hiring – Click here to expand or close the navigation menu.
Reqs 	<ul style="list-style-type: none"> • Reqs – Click here to access requisitions.
Candidates 	<ul style="list-style-type: none"> • Candidates – Click here to access candidates, folders, run candidate searches, access saved searches, candidates in queue, and To Do's.
Reports 	<ul style="list-style-type: none"> • Reports – Click here to run, schedule, and administer report schedules.
Admin 	<ul style="list-style-type: none"> • Admin - Click here to access Administrator features.
Support Portal	<ul style="list-style-type: none"> • Support Portal - Click here to display resources available to you on BrassRing's Support Portal. This Web site provides user documentation, information on training, user groups and events, announcements, and other valuable information about talent management.
Help	<ul style="list-style-type: none"> • Help – Click here to load the IBM Knowledge Center which contains user documentation and training material for IBM Kenexa Talent Management Solutions and Watson Talent.

Support Portal

The Support Portal is an online resource providing information for users of BrassRing. To access the Support Portal, click **Support Portal** on the Hiring Menu in the upper left corner of BrassRing.

Some of the elements of the Support Portal include:

- **Support:** View FAQs and provide feedback on BrassRing and suggestions for new functionality.
- **Training:** View IBM's eCampus and onCampus schedules and offerings.
- **Talent Management:** Learn about ways in which companies are using IBM products and services to further their staffing vision.

Chapter Summary

- It is important to confirm that your computers and Web browsers are configured with the appropriate desktop settings and browser requirements.
- Your super users may provide assistance with user names; IBM cannot.
- When using BrassRing you should open only one browser.

Check Your Skills

Answer these True or False Questions:

1. If I forget my password, I can ask IBM for that information.
2. To clear my computer's cache, I access the Support Portal.

Select the best answer(s):

3. The following information is available on the Support Portal:
 - a) IBM course offerings
 - b) BrassRing Quick Reference Guides (QRGs)
 - c) Self Study Courses
 - d) All of the above
 - e) None of the above

Chapter 2: Managing Reqs

Chapter Overview:

At most organizations, recruitment begins with the creation of a job requisition (req) form. The Reqs module within *BrassRing* helps your organization manage the entire lifecycle of a req, from creation and approval to posting to your company's web site and more. Using BrassRing, your req process is streamlined and efficient.

This chapter focuses on managing reqs, the typical first phase of the recruiting process.

Objectives:

At the end of this chapter you will be able to:

- Navigate through lists of reqs.
- Recognize the various lifecycle statuses of reqs.
- Access and complete a req form.
- Save an incomplete req form as a draft, to allow you to complete later.
- Approve or decline a req sent for online approval (optional feature).
- Review a req Addendum form (optional feature).
- Search for a req.
- Open a req.

Overview of Reqs

Navigating within BrassRing

To access reqs, click **Reqs** from the **Hiring Navigation icon**  (refer to Figure 2-1). From here you can add, search for, or view a list of reqs assigned to a certain req lifecycle status-such as Open or On Hold.

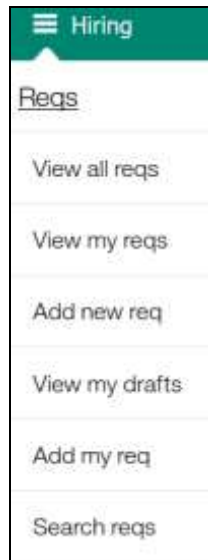




Figure 2- 1: The reqs menu

You may have access to view all reqs in BrassRing (View all reqs) or only those reqs that you are associated with (View my reqs). Reqs appearing within your My reqs option are those reqs that you created, were selected as the recruiter on the req form, were selected as a req team member on the req form, and/or were named as the Hiring Manager. Although many organizations do not need their hiring managers to log into BrassRing, as they use eLink technology to manage reqs and view resumes/CVs.

-  **An eLink is an e-mail message sent from *BrassRing* embedded with a hyperlink to a req, resume/CV and/or candidate form. More to come in Chapter 6: *Tracking Candidates*.**
-  **If your organization is not utilizing the online approval routing features of *BrassRing*, the req will skip the Pending status and automatically be assigned to the Approved lifecycle status after it has been created.**

Life Cycle of Reqs

In *BrassRing*, a req typically goes through at least four different stages. Here is a typical progression:

Pending → Approved → Open → Closed

A req can also be assigned to the stages of On Hold, Cancelled, Deleted, or Declined.

Below is a description for each stage of a req:

Pending req- one that has been created and is in the process of being approved online, as defined by your company's specific approval process.

Approved req- has received each and every required approval. When the final approval is granted, *BrassRing* automatically updates the status of the req from Pending to Approved and sends an e-mail to the recruiter, who may open (and post) the req.

Open req- is available for recruiting. The approved req is moved manually to the open status (typically by the recruiter) using a link within an e-mail they receive once the final approval has been granted. Once opened, *BrassRing* automatically generates a req folder used to track candidates for the job. The req can be posted by the recruiter to your corporate web site via a *Talent Gateway* or to a job board on the Internet. Lastly, when the req is opened, the time to fill clock begins counting.

Closed req- has been filled.

On Hold req- needed to be temporarily suspended. Doing so will pause the counting of days that the req is considered open. The req will also be unposted from any Talent Gateways it was previously posted to.

Cancelled req- will no longer be recruited for due to reasons such as budget constraints, headcount changes, or job level changes. Your organization defines when a req should be cancelled. Cancelling a req will unpost that req from any Talent Gateways it was previously posted to.

Deleted req- used infrequently, when a req was entered erroneously. Typically, only Super Users have the ability to delete or undelete a req. Deleted reqs are not truly deleted but instead moved to a Deleted status. They remain stored within *BrassRing*.

Declined req- turned down during the approval process. Req may have an accompanying Addendum form, appearing to the person declining, allowing them to indicate the reasons why they have declined.

 **From On hold, a req may be moved to the stages of Open, Closed, Cancelled, or Deleted.**

Initiating a Req

Now that we have some background information on navigating through the Reqs menu, we will discuss how a req is created.

BrassRing offers five methods to initiate and complete a req. Of the five ways, two take place within BrassRing, and three happen outside of BrassRing.

Select the way(s) in which your company is going to initiate reqs:

- A recruiter logs in to BrassRing to add a new req.

- A recruiter logs in to BrassRing and uses **eLink blank req** to send a blank job requisition form to a hiring manager, who then completes it.
- A hiring manager goes to your company's Intranet and accesses a blank req form by clicking a hyperlink.
- A hiring manager goes to your company's Intranet and requests that a blank req form be sent to his/her e-mail address via the **eLink blank req** functionality.
- Your company imports completed reqs from your HRIS into BrassRing.


■ **If you are creating a multi-language req, you may select/de-select checkboxes for each language to create the req in, and toggle between each hyperlinked language.**

■ **An eLink is an e-mail message sent from BrassRing embedded with a hyperlink to a req, resume/CV and/or candidate form. More to come in Chapter: *Tracking Candidates*.**

New Req

Below are steps for adding a req from within BrassRing.

Adding a Req

1. From the **Hiring Navigation icon** , click **Reqs * Add new req**. Your company may have multiple req templates to choose from. If so, choose the template you wish to complete and you will be taken to that particular form.
2. If you are using more than one language select the language(s) for the requisition.
3. Select **Add new**.
4. To access the list of **Job Codes** type the job title or job code into the job code field. Choose the job code that matches the position.
5. Using the text editor, customize the **Job description** field.
6. Select a **Recruiter** and a **Manager**. Make one selection for each.
7. Confirm the value appearing for the **Number of Positions** field.
8. Complete the remaining fields for the req.
9. Choose any **Req Team** members.
10. If applicable to your company, select the appropriate **Approval Routing** for your req.

11. **Notify Upon Approval Completion** - This field indicates who will receive an e-mail once all approvals were received for the req. Typically, the recruiter is selected here, as he/she is responsible for posting the req. The e-mail will include link to post the req.
12. Click **Save and continue>>**. This allows you to enter an e-mail message to (only) the first approver and (if desired) the Req team. To copy the Req team, click the **CC: req team** checkbox.

- 🚩 **During training, be sure to select only users who are part of the training as a Recruiter, Manager and Req Team Members.**
- 🚩 **Any field with a red asterisk (*) is required.**
- 🚩 **When adding a req, some fields may be read only, meaning they cannot be edited.**

Elements of the Req

The req form you complete not only includes standard fields, such as job title and location, but also has custom fields to fit your company's needs. Below we will discuss some of the fields on your req form.

Job Codes

In selecting a pre-defined job code, you are also selecting its associated job title and oftentimes its job description. In addition, your company may have chosen to associate other information with the Job code, such as a specific job grade. In short, when you select a Job code, some or all of the fields on your req form may populate with such pre-defined information. The process is referred to as Job Code Default Data (JCDD). See Figure 2-2 regarding the selection of a Job code.

- 🚩 **If you would like to select a different job code, click job code on the req form, and select another job code. Making a new selection from the req form may or may not update the pre-defined information, depending on your organization's configuration.**



Figure 2- 2: Selecting a job code

 **Click Edit req to make changes to a req form. Track any changes in the Req notes field.**

Job Description

The job description field allows the user to enter specific job details of the req. These details can be made available to the candidate on the Talent Gateway. If the field is associated with the job code, it will pre-populate based on the job code selection.

If your organization has enabled Embedded URL, you can embed URLs to videos in the job description field when adding or editing your req form. The video will then be available to your candidate from the job details page of the Talent Gateway. Candidates do not have to be logged into the Talent Gateway to watch the video.

To embed a video to a req:

1. Go to **Reqs * Add new Req * Select Req Form**.
2. After completing any fields prior to the job description field, enter the **job description** details, if they do not automatically pre-populate based on the job code selection through the JCDD (Job Code Default Data).
3. Position the cursor in the job description field where you want the video to display.
4. Click the **Embed URLs** hyperlink. The Embed URL dialog box displays.
5. Select **Video** from the drop-down list.
6. Enter the full URL format, and click **Preview**. The Video preview launches in the dialogue box.
7. If desired, adjust the video pixel size, width, and height.
8. Click **OK**. This will add the video merge token into the Job Description field. The candidate will review the video wherever the token is located.

 **BrassRing supports the following video sources: YouTube, Vimeo, and Matacafe.**

Recruiter and Manager

Select one recruiter and manager per req. Those selected will have access to the req from Reqs>My Reqs and will have similar privileges as the req creator and Req Team (discussed in more details below).

The individual selected as Manager typically will not have such privileges, as most companies do not allow their hiring managers to log-in to BrassRing. Most of their interaction with BrassRing occurs through eLinks directed to their e-mail. This will be discussed in greater detail in Chapter 5: Screening Candidates.

Number of Positions

This field will typically default to one, meaning one candidate can be hired for this position. Hiring that one person will change the 1 to 0.

If your company is using auto-countdown, you will be permitted to edit the number of positions field and enter the total number of candidates that will be hired for this position. *BrassRing* will automatically decrease the number of positions whenever a candidate is hired for this req until 0 is reached, at which point the req may be closed.



* No. of Positions 1

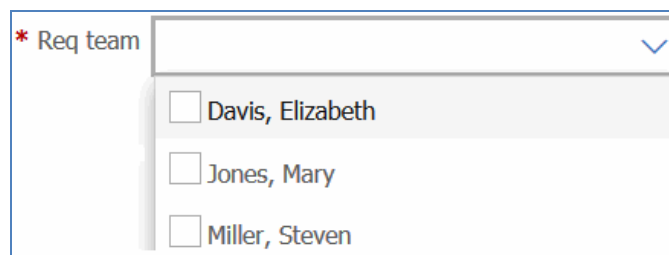
Figure 2- 3: Number of positions

Set Proximity Coordinates

The fields in the Set Proximity Coordinates section allow the recruiter to enter location information specific to the requisition. Candidates, in turn, will be able to search for positions within a certain distance of their location in the US and internationally on the Talent Gateways.

Req Team

Req team members are those individuals who might assist you in filling a req. It could be a colleague who covers the req while you are away from the office or perhaps an HR Generalist.



* Req team

- Davis, Elizabeth
- Jones, Mary
- Miller, Steven

Figure 2- 4: Req team

Req team members, req creators and those selected as the recruiter for a job req are given certain privileges. Typically, they are permitted to:

- Receive e-mails regarding a req, such as when it is opened or put on hold.
- Access and update HR statuses of candidates associated with the req.
- Search and locate those reqs for which they are team members.
- Edit/modify the req form.

- **In BrassRing, to select more than one person in a multi-select list, hold down CTRL (not Shift) while making selections.**

Turn off Autofiler Notification for this Req

Selecting this checkbox will prevent e-mail notifications from being sent to the members of the req should a candidate be auto-filed to the req folder to which they have applied. This option might be selected for reqs where a high volume of resumes/CVs are expected to be received. Deselecting this checkbox does not prevent candidates from being filed, but stops the confirmation e-mail message from being sent to members of the req (the recruiter or req team members).

- **Turning off autofiler notification on a req form does so for only that particular req, not any other reqs.**

Notify Upon Approval Completion

This is most often the recruiter. When all approvals have been submitted, the person selected in this field will receive an eLink indicating that the req has been approved, allowing the person selected to open and post the req.

Your Company's Fields

The req form has been customized for your organization. As a result, some fields may be familiar to you, while others may be new. You may also notice how the selection of one field impacts options in another field subsequently available as you complete the req form.

Approval Routing- Options

Note: If your company is not using BrassRing's online approval routing feature, please proceed to the Save Req as Draft section.

There are three possible options you might see when selecting req approvers:

Use...	When...
Bypass approval	An approval for this req is not necessary or required from this approval group (ex. CEO).
Non-system user	Used when an approver's name is not found in the drop-down list of approver names. This option allows you to type in the e-mail address of the intended approver.
Name in list	The approver is included in and selected from a list of names.

Figure 2- 5: An example of approval routing options

- **The options for each approver have been customized to best meet your company’s needs. Thus, you may not have all options for each approver.**

Completion of the Req Form

Once the requisition has been completed you can click the Save button at the bottom of the Req Form.

BrassRing assigns a unique req number for every req that is created, whether the req is opened or not. See Figure 2-6.

Req 370BR : Admin has been created.

To send a message with this req when routing it for approval, enter your message below.

Your message

CC: Req team

Route req for approval Save without routing for approval

Figure 2- 6: Routing the req for approval

Save Req as New

Save as new is a shortcut for creating a req by duplicating a req that is already in BrassRing. All information is copied including: job code, recruiter, manager, req team and approval routing. This copied information may be edited.

To save an existing req as new:

1. Select the req you want to duplicate and click **Save as new** from the list of Actions.
2. Edit any req form fields as necessary.
3. Click **Save and continue**. See Table 2-1 for saving options for reqs.

If approvals were:	Then your options are to:	or
All bypassed	Open req	Save req to approved reqs
Assigned to approvers	Route req for approval	Save without routing for approval (req assigned to Pending status)

Table 2- 1: Saving options for reqs

Save as Draft

Should you ever begin completing a req and wish to finish it at a later time, click the **Save as draft** button at the bottom of the req form.

Later, to access saved drafts for completion:


1. Go to Reqs * **View my drafts**, and select the draft req of your choice.
2. Click **Edit** from the Actions menu and make your updates.
3. Click **Save and continue** to route for approval, or save the req without routing.


- ❗ **To save a req as a draft, you must first complete the job title field.**
- ❗ **You cannot eLink a draft req to be completed by another individual.**
- ❗ **External users using the eLink req option to create a req cannot use the Save as a draft feature.**

Set/Edit My Req Defaults

BrassRing allows you to establish default req data as a template for yourself, thus saving time if you often create similar types of reqs.

To set a default req template for you:

1. Go to Hiring Navigation icon  , click **Reqs * Add my req * Set my req default**
2. From the Actions menu, click **Add new defaults**. A new window opens.
3. From **Select Req Form**, select **the req form for which you want to set defaults * Continue**.
4. Complete the fields of your choice for your default.
5. Click **Save and continue**. You will receive a confirmation message when the defaults have been saved.

The template is now available to use in the future. To create a requisition using your template, navigate to Hiring Navigation icon  , click **Reqs * Add my req** and then click the **req form** you would like to create.

- ❗ **Creating a req using your req defaults will result in your defaults overriding the fields that would normally be populated by Job Code Default Data.**

Routing and Approving/Declining Req eLinks

If your company is not using BrassRing's online approval routing feature, please proceed to Opening a Req.

Approval Routing Workflow

Using eLinks, the req one creates is sent via e-mail to your company's approvers. Req approvals are sent in sequential order- the first approver must approve the req before the second approver receives the eLink to approve the req, and so on.

- **The options for each approver have been customized to best meet your company's needs. Thus, you may not have all options for each approver.**

Approving or Declining a Req

Reviewing the Req eLink in Approval Routing

Req approvers receive an eLink to the req in their e-mail inboxes. To respond to the approval request:

1. Open the e-mail as you normally would. Click the link marked **View req details**. See Figure 2-7. Note: The link may be either embedded in the e-mail text, or available as an attachment.
2. Within the window that is launched after clicking the link, review the information on the req.
3. Type a **Message** to the next approver, if desired.
4. Click **Approve, Decline** or **Save Edits and Restart Approvals**. Note: If you are the first approver, the option to Approve & Re-Route does not display.

If declining the req and if your company is using an Addendum form, it will now appear in a new window. It contains options to indicate why the req is being declined.



Figure 2- 7: The req eLink

- 🌐 **If your company is not using the Req Decline feature, provide instructions to your approvers on how to process the req.**

Approving or Declining the Req eLink

The first approver has the option to Approve or Decline the req as is. Subsequent approvers have three options:

Approve

Decline

Save Edits and Restart Approvals


- If an approver is going to approve the req and wants to include a brief comment, the comment should be added to the Req notes field. This is the only req field that may be modified during approval routing which will not result in the req being re-routed back to the first approver.
- If an approver is declining the req, the req approval process is immediately halted. Your company may have an Addendum form that will automatically pop up to be completed, detailing why the req was declined. The form is attached to/available from the req form moving forward.
- If the approver chooses Approve and reroute, the req is sent through the approval process again starting at first approver. See Figure 2-8.

The screenshot shows a web form titled "Approve/Decline Req: 40BR Implementation Consultant". At the top, it says "Fields marked in asterisk (*) are required". The form is divided into two main sections. The first section, "Approval", contains a "Message" text area and three buttons: "Approve", "Decline", and "Save Edits and Restart Approvals". The second section, "Requisition Information", contains several fields: "Job Code" (000 Implementation Consultant), "Job Description" (Implementation Consultant Job Description), "External Job Title" (Implementation Consultant), "Internal Job Title" (Special Projects Project Consultant), and "Department" (Project/Operational Management). There is also a checkbox "Do you want to reroute this req?" with "No" selected.

Figure 2- 8: Approving or declining a req

Tracking Approval Routing

To track the approval process to determine who has yet to approve the req:

1. From the Hiring Navigation icon , click **Reqs * View my reqs * Pending** or **View all reqs* Pending**.
2. View the req by clicking on the link of the req number.

3. Scroll to the bottom of the req form to the **Approval routing** section. A date stamp appears next to the name of the person who has approved the req.
4. Click **Cancel** to close the window.

A few things to know about tracking the approval process:

- If a req has all the necessary approvals, it will automatically update from the status of Pending to the next req status of Approved.
- When blank space displays next to an approver's name under Date, it means he/she has not yet approved the req. This is the approver who is holding up the approval process.
- If an approval level was initially bypassed, the date the req was originally completed-and the date the approval was bypassed-will display.
- If a req is declined during the approval process, it will automatically update from the status of Pending to the status of Declined.

Approval routing		
Job title	User	Date
Senior Manager	Jones, Mary	10-Jan-2018
Regional Manager	Davis, Elizabeth	


Notify upon approval completion: Smith, John

Figure 2- 9: The approval routing bottleneck. Regional Manager, Elizabeth Davis, has yet to approve the req.

- 🚩 **When an approver modifies a req, these modifications replace the original information entered on the req.**
- 🚩 **Your company may have notification e-mails that are distributed when a req changes status, such as to Open or to Declined.**
- 🚩 **Req approvers using mobile devices have three ways to access the eLinked req:**
 1. The standard link **View Requisition Details**
 2. The actual http link.
 3. Copy the http link and paste it into the browser's address bar. **Note:** You must copy the entire http address, including any characters at the end, such as the = sign.

Reviewing a Req Addendum Form

Your company may be using a Req Addendum form for declined or cancelled reqs. To view the form:

1. From Hiring Navigation icon , click **Reqs * View my reqs * Declined** or **View all reqs* Declined**.
2. View the req by clicking on the req number, which is hyperlinked.
3. In the **Req history** tab, click **View addendum**.
4. Review the form. Click **Close** when finished.

 **Your Addendum form may have a unique name, such as Reason for Decline form. This form is still accessed via the View addendum form link.**

Req Routing Troubleshooting

Here are some troubleshooting tips and for routing of reqs:

To...	In BrassRing you should...
Stop the approval process	Update the status of the req to Cancelled. This will inactivate the eLinks sent to approvers.
Re-send the approval email to the approver it is pending with	From the list of Pending reqs, select the req * click Route for approval . A new eLink will be sent <i>only</i> to that approver who has stalled the process.
Manually approve the job req from within BrassRing	From the list of Pending reqs, select the req * Edit req . Scroll to the Approval routing section on the req form. Click the checkbox(es) next to the approval level(s) you wish to manually approve. Indicate why you took this action in the Req notes field. Save after making any changes to the req form.

Opening a Req

Once a req is approved, you need to open it so you can begin your recruiting efforts. Opening a req is a trigger for a few key events within *BrassRing*:

- The time to fill clock starts.
- The req folder appears. With the req folder, the tracking of candidates becomes possible, as it is within this folder that applicant flow is tracked.
- The req can be posted to *Talent Gateways*.

Before opening a req, keep the following in mind:

- The req must be in the Approved req status.
- Recruiters are typically responsible for opening and posting job reqs.
- You can only open reqs that you have added, or to which you have been assigned as a Recruiter or Req Team member.
- Super Users can also open reqs. This might happen if someone has left your organization. This ability to open reqs allows Super User to get the job posted and then reassign the req to a new recruiter.

Open a Req

There are two ways to open a req:

From within BrassRing:

1. Find the approved req you want to open and select it.
2. Click **Open req** from the **Actions** menu.

Refer to chapter 3 for additional information on how to post reqs.

From an eLink sent to you:

If your name was selected in the req form field **Notify upon approval completion**, an e-mail is sent to you when the final job req approval has been granted. This allows you to open a req in the following manner:

1. Open the e-mail received and click the link marked **Open the req**. See Figure 2-12. A window opens allowing you to post the job to your *Talent Gateways*.
2. At the bottom of the page, click **OK**. This opens the req in *BrassRing*.



Figure 2-12: Opening req from eLink

- **Your company may have opted for eLinks to open reqs. The links will be sent as attachments, rather than embedded in the text of the e-mail.**

Chapter Summary

- From the Reqs menu, you can add, search, view and post reqs.
- The typical lifecycle progression for a req is:
Pending → Approved → Open → Closed.
- There are five standard ways BrassRing provides to create a req.
- The req form is composed of standard and custom fields.
- To have complete access to a req, you must be the creator of the req, or selected as a Recruiter or Req Team member.
- Approvers receive reqs for approval via e-mail. Doing so updates BrassRing.
- Opening a req is a manual step taken once the req is approved. It is taken by the individual whose name was selected on the req form in the field labeled Notify upon approval completion.

Check Your Skills

Answer these True or False Questions:

1. Any req approver can make edits to the req form without having to re-route the req back through the approval process.
2. *BrassRing* automatically updates the status of a Pending req to the Open status when all approvals are submitted.

Select the best answer(s):

3. Which action(s) is not triggered when a req is opened:
 - a. The time to fill clock starts.
 - b. The req folder appears.
 - c. The tracking of candidates becomes possible.
 - d. Internet job boards automatically source candidates.
 - e. None of the above.
4. Privileges for members of Req teams typically include:
 - f. The ability to editing the req.
 - g. Receiving e-mails pertaining to the reqs lifecycle status.
 - h. The ability to update candidates within the req folder.
 - i. The ability to search for the req.
 - j. All of the above

Perform these hands-on exercises in *BrassRing*:

5. View the list of Pending reqs. How many are there?
6. View the list of Approved reqs. How many are there?
7. Save a req as new. Select your Training User Name as Recruiter, Manager and as a member of the Req Team. Bypass all approvals. Save this req to your approved reqs.
8. Save a req as new.
9. Open the req you created in #7. Click **Cancel** to prevent a positing on the Talent Gateways.
10. Search for an open req with your Training User Name as the Recruiter.

Chapter 3: Talent Gateways

Chapter Overview:

A *Talent Gateway* is a job site hosted by IBM which is dedicated to helping organizations simplify their job posting process and accelerate their online recruiting efforts.

Talent Gateways are typically linked to the careers section of your corporate Web site. This is referred to as an *External Talent Gateway*. Another might link to the employee career section of your Intranet. This is referred to as an *Internal Talent Gateway*. Another type of Talent Gateway may be used to help streamline your relationship with your recruitment agencies- the *Agency Manager*.

Open reqs may be posted to any, or all, of your company's Talent Gateways, depending on your unique hiring process.

When candidates provide their resume/CV information via a Talent Gateway, it is transmitted directly into *BrassRing* for immediate access and follow-up by recruitment.

This chapter focuses on Talent Gateways, the real-time recruiting tool for targeted candidate populations.

Objectives:

At the end of this chapter you will be able to:

- Post a job to a Talent Gateway.
- Assign questions to a Talent Gateway job posting.
- Access resumes/CVs submitted through a Talent Gateway.
- Remove a job posting from a Talent Gateway.

Overview of Talent Gateways


Types of Talent Gateways

There are different types of Talent Gateways, targeting a specific candidate audience. Check/add those that your company is using:

- External Talent Gateway
- Internal Talent Gateway
- Other: _____.

Elements of Talent Gateways

There are a few things you should know about *Talent Gateways*:

- Your company has made many decisions about your Talent Gateways: look and feel, verbiage, default settings and other features.
- When viewing the list of open reqs: an orange pushpin icon  appears, meaning the req is currently/about to be posted to a Talent Gateway. A grey pushpin means the posting has since expired or the req was manually unposted; while no pushpin icon appearing means the job was never posted.
- Pre-qualifying questions, defined by your company, may be available to be posted with each req for candidates to answer when submitting their information.
- When candidates provide their information through a Talent Gateway, they receive an immediate e-mail message confirming their submission.
- Resumes/CVs are tagged with: codes identifying: the Talent Gateway they applied from, the Req number, the Job code they applied to, and sometimes a specific Source showing the site the candidates came from.
- A posting to a Talent Gateway is automatically removed from the Web site to which it was posted when it expires or when the req is closed, cancelled, put on hold, or moved to a deleted status.
- Jobs will display on your Talent Gateway within 30 minutes of posting.
- There may be default information that displays in the Talent Gateway posting fields. Contact your Super Users with any questions regarding any such defaults.
- When re-posting a job, if your organization is using Gateway Questionnaires, those are presented with the req by default when the req is posting again.

- After a req is posted, if a change is made to a req field and that information should be updated on the Talent Gateway, make sure to repost the req.

■ Your company may be using an IBM partner for posting jobs to Internet job boards (job aggregator). When a job has been posted, the orange pushpin icon will display with an orange circle behind it.

Posting of Talent Gateways

When a req is opened, you are immediately prompted to post your req to a Talent Gateway, as seen in Figure 3-1.

The screenshot shows the 'Edit posting options' interface for a job posting. At the top, it says 'Posting 352BR : Trainer' with a 'Select job posting preview' button. Below this is the 'Talent Gateways' section, which contains a table with columns: Gateway site, Days until posted, Days to remain posted, Posted date, Removal date, Time, Zone, and Select Gateway Questionnaire. Two rows are visible: 'External Gateway' (checked) and 'Internal Talent Gateway' (unchecked). Below the table is a button 'Reset Gateway Questionnaire(s) to default'. Underneath is the 'Agency Managers' section with a table with columns: Agency Manager, Days until posted, Days to remain posted, Posted date, and Removal date. One row is visible: 'Agency Manager' (checked). At the bottom, there are buttons: 'Update all postings', 'Close', 'Cancel', 'Refresh', and 'Update newly selected/unselected postings only'.





Gateway site	Days until posted	Days to remain posted	Posted date	Removal date	Time	Zone	Select Gateway Questionnaire
<input checked="" type="checkbox"/> External Gateway	0	188	13-Oct-2016	03-May-2017	12:00 AM	Eastern Time (US & Canada)	None
<input type="checkbox"/> Internal Talent Gateway	0	185			12:00 AM	Eastern Time (US & Canada)	




Agency Manager	Days until posted	Days to remain posted	Posted date	Removal date
<input checked="" type="checkbox"/> Agency Manager	0	253	13-Oct-2016	18-Aug-2017

Figure 3- 1: Selecting Talent Gateways

To post a req to a Talent Gateway:

1. **Select** the checkbox(es) for the Talent Gateways you want your req posted.
2. **Days until posted** - select the number of calendar days you want to have passed until the req is posted to that Gateway. Your organization determines how many days will default here.
3. **Days to remain posted** -select the number of calendar days you want the req to stay posted on that Talent Gateway. Your organization determines how many days will default here.

4. If used by your organization, enter the **Time** and **Zone** you would like your req to be removed from that Talent Gateway on the date indicated in the **Removal Date** column. The Removal Date will automatically be populated based on the number of days selected in the Days to remain posted field.
5. If used by your organization, select the Gateway Questionnaire you would like to have the candidates complete when applying to the req in the **Select Gateway Questionnaire** field.
6. **Edit site options** - If you are using the **Edit site options** functionality proceed to Pre-Qualifying Questions. This option can be found by clicking the  next to the name of the Gateway.
7. **Repost** - Individually enabled for each Gateway site to which the requisition is currently posted. To repost the requisition, click the  next to the name of the Gateway site. Select **Repost** from the drop-down list. Examples of when you may use the Repost feature: update individual sites, move the req to the top of the site's job list, or extend a reqs posting on a site.
8. **Featured Job** - Individually enabled for each Gateway site. Enabling this feature places the requisition on the home screen of the Talent Gateway; thereby tagging the job as a **featured job**. To make a requisition a **featured job**, click the  next to the name of the Gateway site. Select **Featured Job** from the drop-down list. A  will appear next to the Gateway name once enabled.
9. **Update newly selected/unselected postings only** – Posts/removes the req only to/from newly-selected TGs and Agency Managers (after they were checked/unchecked) and resets the **Posted date** for those newly posted.
10. **Update all postings** – Select this button when you edit posting options and want to make them effective on all sites.
11. Click the **Close** button.


-  **A posting will go up on the Talent Gateway(s) at 12:01a.m. Eastern Time (if an option other than 0 for the Days until posted field is selected).**
-  **The Talent Gateway posting expires at 11:59 p.m. Eastern Time on the designated expiration date (i.e. Days to remain posted date). This is not applicable if the Time and Zone fields are being used or if your organization has changed the default time zone.**
-  **Your req will display on Talent Gateways within 30 minutes of posting the req.**

Pre-qualifying Questions

In addition to providing a means to post jobs to your company's web site and/or Intranet, Talent Gateways allow you to select pre-qualifying questions to ask candidates when they apply to your job.

Additionally, you may be able to score these questions so that individuals within your organization are notified immediately by e-mail when a candidate meets or exceeds a target score. Later, you may search for candidates based on their current Talent Gateway (TG) scores.

Your req and pre-qualifying questions will display on Talent Gateways within 30 minutes of posting the req.

1. From the posting screen, click on the arrow next to the Talent Gateway to which you want to add site questions. Select Edit Site Options to assign pre-qualifying questions. The **Gateway site questions** window appears. Figure 3-2.
2. Under **Available Questions**, you can use the filter icon  to access available questions, if the questions are grouped by job function. Select question(s) to ask your candidates when they submit their resumes/CVs. Drag and drop the question to the right side of the screen. To reorder questions, drag and drop the question to the appropriate location.
3. If available, enter a value in the **Score** field per question for **Required for HR Status Update**. If the question is essential for updating the candidate's HR Status, use this field in conjunction with with the HR Status Update **Meets/Exceeds Minimum and Question Required Score** and **Below Minimum or Question Required Score** settings.
4. The **Baseline Highest Possible Score** automatically populates as a result of what is added for #3 above.
5. If applicable, in the **Preferred Candidate** section, enter a value for **Target score** (optional step).
 - Select end users or non-system users as appropriate for **Notify the following users when a candidate meets or exceeds target** (optional step).
6. If applicable, enter a value for **Minimum Score** for HR Status Update (optional step).
 - Select an HR status from the **Question Required Score** field.
 - Select an HR status from the **Below Minimum OR Question Required Score** field.

Note: This setting will override the instafile HR status. Candidates will be updated to this selected HR status if they meet the **Minimum Score** and every **Required For HR Status Update score** that has been set at the question level selected. If a candidate meets the minimum score but does not meet all the question specific required scores, he/she will be classified as **Below Minimum**.

7. Click the Copy to Other Gateways button if you want to add the same questions and/or scoring to other Talent Gateways.

8. Click **Save**.
9. Click **OK**.
10. From the Posting Page (the page displaying the different Talent Gateways), finish indicating what Talent Gateways the req will be posted to.

Figure 3- 2: Adding additional Talent Gateway questions. Note the Add a question button at the top center of the page

- 🚩 To select more than one person in the **Notify the following users when a candidate meets or exceeds preferred candidate target field**, hold the **CTRL** key (not Shift) while clicking on names.
- 🌐 You may be able to search for candidates by their scores. If so, the **TG Score** will appear as an option when editing your **Search and Output** fields. You will learn more about how to do this in **Chapter 9: Searching for Candidates**.
- 🚩 If you un-cancel a req or remove a req from on hold, the previously attached **Gateway Questionnaire** is re-attached to the req when the req is re-posted. You can remove that **GQ** and select a different one if desired.
- 🚩 Your company may also have opted to use **Community Gateway** which enables you to post reqs to **Monster** or **CareerBuilder** without using a posting partner.

Posting a Req to the Internet

Your company may use *BrassRing* to help with the posting of req information to job boards on the Internet. If this is the case, you will notice an additional section in the window for **Other posting options**. This section will include any IBM partners (Job Board Aggregators) that your organization has chosen to contract with.

Their page will be launched when clicking the pencil  icon (Refer to Figure 3-4). Ask your Super User for information on using this capability.



Figure 3- 4: Posting to job boards

Job Posting Preview

After the req is opened, and you have decided which Talent Gateways you will post to, you may want to preview the job details as they would appear to a candidate. The job posting preview is available:

- On the Posting options screen
- On the req details screen (seen when you click the link of the req number)
- From a list of reqs, selecting Job Posting Preview from the Actions menu
- To see what the req would look like if posted on a Classic Talent Gateway

To eLink a Job Posting Preview from the Posting Options Screen:

1. From the **Posting options** screen, click the **Select job posting preview** button
2. Click the checkbox for the Talent Gateways your job will be posted to.
3. Click the **Send eLink** button. Address and enter a message, if desired
4. Click **Send**.

Though the job posting preview is not editable, users can copy and paste the job posting preview text or eLink the preview to a recipient.

Sending a Job req preview as an eLink creates a job req eLink history, available from the job req details page. This section will list: Sender name, Recipient name/e-mail, eLink sent (date), and eLink opened (latest viewed date).

Viewing Responses to Pre-Qualifying Questions

Candidates' responses to pre-qualifying questions are easily viewed in *BrassRing*:

1. While viewing the candidate's Talent Record, click the **Forms** tab.
2. View the form titled **Job Response Form**. The questions asked of the candidates and their responses display.

- **Because candidates can apply to more than one job, they will often have more than one Job Response form. To identify the responses the candidate gave to your job questions, find the Job Response form that shows your req number in its title.**
- **You can also choose to leave a job posted on a Talent Gateway while it is on hold.**

Removing a Posting

These are the ways to remove a job posting from a Talent Gateway:

- Set the expiration date at the time of posting the job.
- Close, cancel, delete, or put the job req on hold.
- Manually remove the posting.

To manually remove a posting:

1. Locate the req using **Search reqs** or **Quick search**.
2. Select the req
3. Click **Open req** from the **Actions** menu.
4. **Deselect the checkbox** for the sites from which you want your posting removed.
5. Click **Update all postings**.

Chapter Summary

- A Talent Gateway is a job site-hosting tool.
- *BrassRing* prompts you to post your req when it moves from the Approved to Open
- There are different types of *Talent Gateways*, each targeting a different candidate audience.
- Pre-qualifying questions can be asked of candidates when they submit their resumes/CVs for a job through a Talent Gateway.
- Pre-qualifying questions and the responses to those questions appear on the *Job Response* form. This form is appended to the candidate's resume/CV.
- You may access a preview of the details of a job posted to a Classic Talent Gateway and eLink it to others for review.
- You have immediate access to resumes/CVs submitted from a Talent Gateway via Candidates>Candidates in queue.
- A posting will automatically expire based on the status of the req or the date settings of the job posting.

Check Your Skills

Answer these True or False Questions:

1. When the field **Days until posting** is set to 0 days, the job is posted to the selected Talent Gateways within 30 minutes.
2. When a job is posted, the pushpin icon changes from gray to blue.
3. Candidate responses to pre-screening questions are attached as a form to the Talent Record called a Job Response form.

Select the best answer(s):

4. Pre-qualifying questions can be:
 - a. Chosen for each req.
 - b. Scored as candidates submit answers.
 - c. Attached as a form to the candidate's resume/CV.
 - d. All of the above
5. Which req lifecycle status(es) can automatically remove a job posting?
 - e. Hold
 - f. Closed
 - g. Deleted
 - h. Cancelled
 - i. All of the above

Chapter 4: Routing & Processing Resumes/CVs

Chapter Overview:

Your candidates are critical for the success of your recruiting campaigns. It is with this in mind that IBM undertakes the responsibility of processing your candidate's resumes/CVs with great speed and accuracy.

IBM also strives to be flexible and innovative in providing you and your candidates with numerous methods for submitting resumes/CVs. Your organization has decided which of these methods best support your recruiting efforts.

In this chapter, we will review the methods for submitting resumes/CVs, discuss best practices, and address the use of codes.

Objectives:

At the end of this chapter you will be able to:

- Identify different methods for submitting resumes/CVs.
- Add candidate information to BrassRing.
- Create a code string that can be used in advertising.

Overview of Resume/CV Routing

Candidate resumes/CVs can be loaded into BrassRing in one of three ways:

- Most often by the candidates themselves, through a Talent Gateway.
- By recruiters logged into BrassRing who use Add candidate from the Candidates menu.
- By recruiters logged into BrassRing who use Add contact from the Candidates menu.
- By an external system, sending candidate resumes/CVs and other information in through an integration.

Overview of Candidate Submission

Your candidates use Talent Gateways to seek and apply for jobs online: externally, via your company web site and internally via your intranet.

Elements of Candidate Submissions into BrassRing

Information about the candidate's experience with Talent Gateways:

- Candidates can provide resumes via upload.
- Resumes/CVs submitted via Talent Gateways appear within BrassRing within minutes, usually seconds. Candidates receive an immediate e-mail confirmation.
- Talent Gateways allow recruiters to ask pre-qualifying questions. The questions and responses to them are referred to as a Job Response Form, appended to the resume/CV and viewable by recruiters.
- Resumes/CVs are tagged with codes to capture the jobs applied to and the source that directed the candidate to apply.
- Your company may have opted to limit the number of jobs a candidate can apply to in a single submission within a Talent Gateway, per req, and within a specific period of time (month, year, specific number if days).
- Your candidates may be required to indicate consent to your company's data privacy policy.
- Your company may allow candidates to apply for a maximum of 10 jobs at one time.
- Your candidates may be permitted to set up a saved search that will inform them about jobs posted that matching their search criteria.
- Candidates may save jobs to a job cart for later to retrieve and apply.
- Your candidates may be permitted to send job descriptions to others by clicking Send to friend.

- Your company may have opted to allow candidates to check the status of their job submissions, or withdraw a submission. Employees who referred to as candidates, can also use this feature to check the status of their referral.

Supported file attachment types on the Talent Gateways are:

avi	mp3	rtf
bmp	mp4	swf
csv	mpeg	tif
doc, docx	mpg	wmv
gif	pdf	xls
Jpeg	ppt	xlsx
Mov	pptx	xml

Candidate’s Experience with Talent Gateways

When candidates access your company’s corporate web site, they are presented with a page that looks similar to Figure 4-1. This is the Candidate landing page.

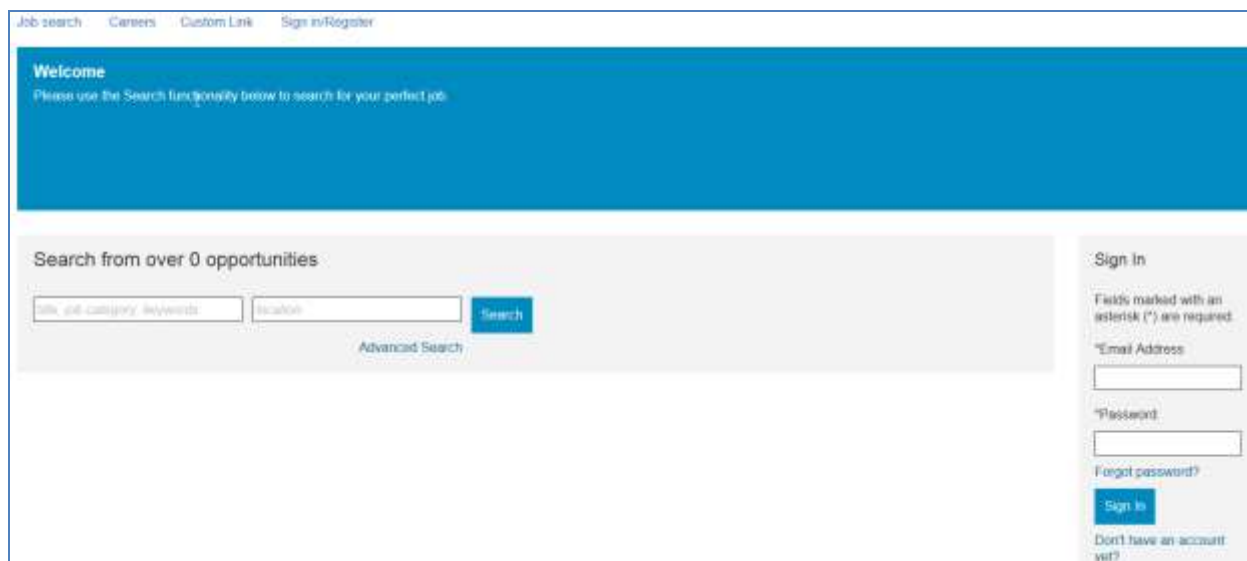
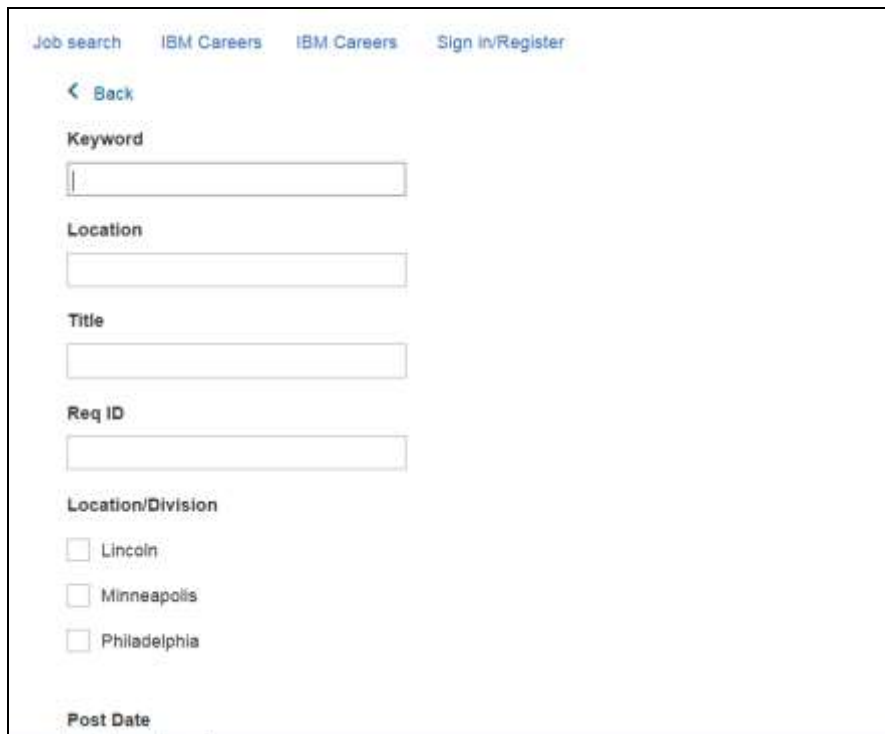


Figure 4- 1: Accessing Talent Gateways –the Candidate landing page

Searching for Available Jobs

Within *Talent Gateways*, candidates can complete an advanced search for positions they are interested in. These positions are the open reqs within *BrassRing* that were posted to the Talent Gateway by recruiters:



The screenshot displays a job search interface with the following elements:

- Navigation links: Job search, IBM Careers, IBM Careers, Sign in/Register
- Back button: < Back
- Keyword: Input field
- Location: Input field
- Title: Input field
- Req ID: Input field
- Location/Division: Radio button options for Lincoln, Minneapolis, and Philadelphia
- Post Date: Input field

Figure 4- 2: Searching for open jobs

Once search results display, candidates review the rows displaying job information, and view the job titles they are interested in. See figures 4-3 and 4-4.

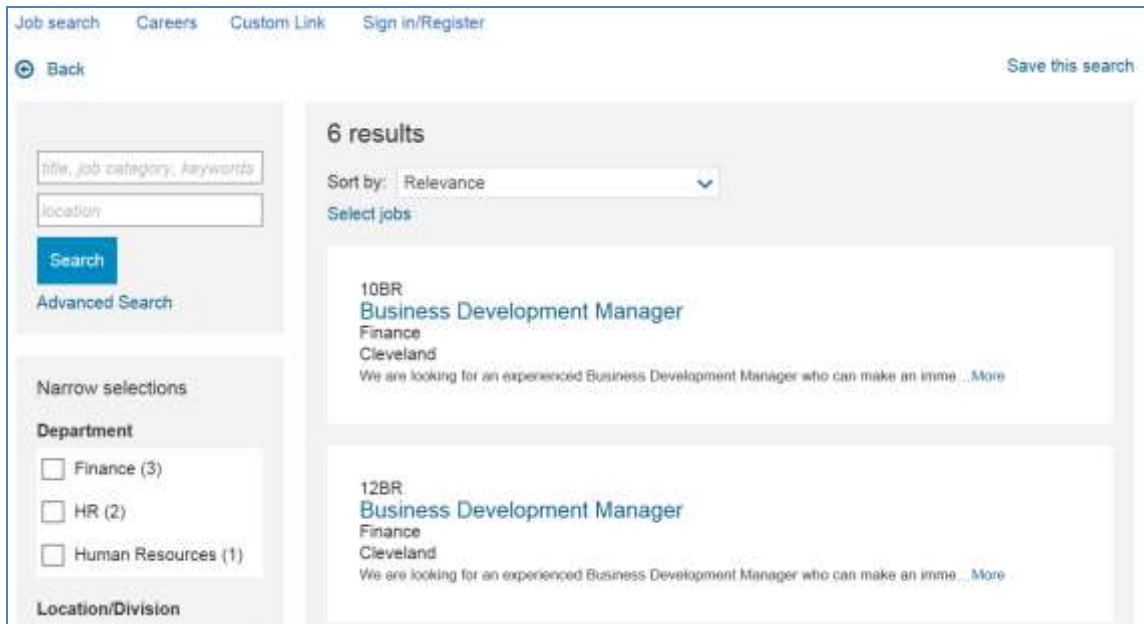


Figure 4- 3: Search results



Figure 4- 4: Viewing job details

Submitting a Resume/CV

When ready to apply, the candidate is prompted to create a log in and build an account. This enables the candidate to track submissions and maintain multiple versions of a resume/CV online. The candidate is asked to start the application and receives an approximate completion time (Figure 4-5). The candidate then enters a resume/CV. Candidates may choose to import their resumes/CVs (Figure 4-6) or enter their resumes/CVs by typing them.

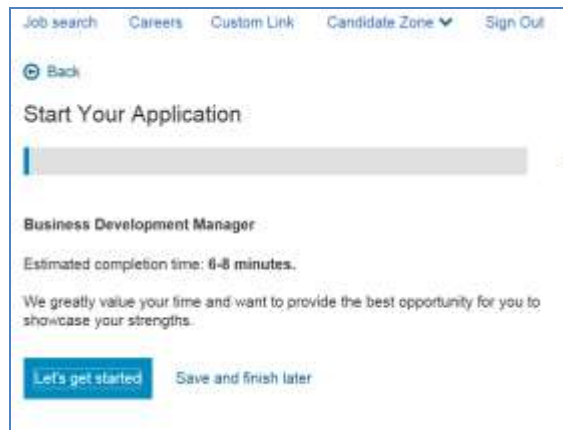


Figure 4- 5 : Start Your Application

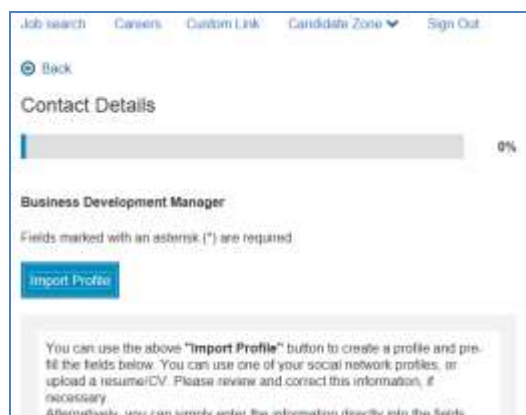


Figure 4- 6 : Import Profile

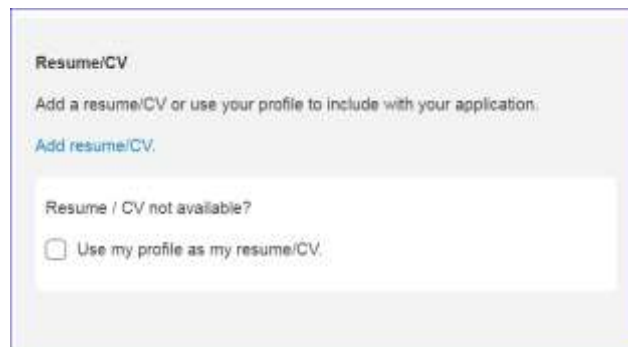


Figure 4- 7 : Upload Resume/CV

After uploading the resume/CV, the candidate confirms data extraction of resume/CV information, such as: First name, Last name, Position held, Employer, Educational Institute, Degree, etc. The maximum number of submissions allowed by a candidate on the Responsive Talent Gateway is limited now to 100. There is no time restriction on this. An error message is displayed when the candidate tries to submit after the number of submissions reaches 100.

Candidate Status Check

Candidates can check the status of their job submissions sent through a Talent Gateway. This feature is available under Candidate Zone > Dashboard > Applications > Submitted Applications. It allows the candidate to see where his/her application is within your organization’s applicant flow. Refer to Figure 4-8.

Elements of Candidate Status Check

- History pertaining to closed and cancelled reqs stops displaying after 6 months.
- The information contained within the Job submission status is updated every 24 hours
- HR Statuses assigned to candidates will be masked with the name of the HR Status Category, thus making the terminology more candidate-friendly.
- Candidates can only withdraw a submission to a job if their resume/CV is in that job’s req folder, the proper configurations are enabled, and the candidate is in a designated HR Status allowing them to withdraw.
- When a candidate withdraws their job bid, their HR status is updated automatically to a final status and remains in the requisition folder.
- When a candidate re-activates their job bid, their HR status is updated in BrassRing to the status prior to the withdrawal.

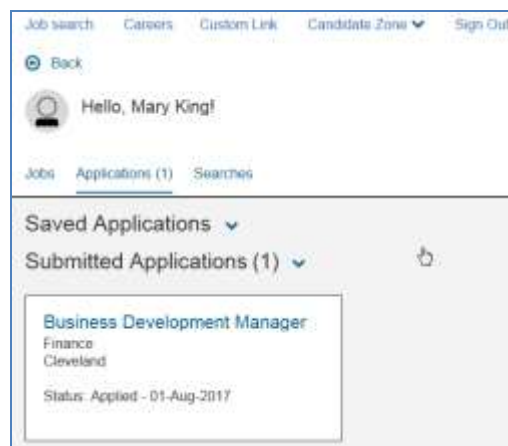


Figure 4- 8: Submitted Applications page



Figure 4- 9: Details of Submitted Applications for Job page

Overview of Recruiter Submission into BrassRing


Recruiters and other users of *BrassRing* have access to built-in methods for submitting candidates directly into *BrassRing*: Add candidate and Add contact.

Elements of Recruiter-based Submissions

- If you have an electronic copy of a resume/CV, or if you have a hard copy and are willing to type in the information, use **Add candidate**.
- If you have only contact information and want to quickly make a candidate record in BrassRing, use **Add contact**.
- Your organization may have opted to allow you to be able to associate codes, notes and the ability to review the new Talent Record for resume/CV data entered via **Add candidate** or **Add contact**.


Adding a Candidate

If you have a hard copy of a resume/CV and want to either upload, copy and paste it, or manually type in the information, use **Add candidate**. To add a candidate:

1. From the Hiring Navigation icon , click **Candidates * Add candidate**.
2. Upload, or copy and paste the candidate's resume/CV. You may also copy and paste the cover letter in the text area. Click **Continue** The extraction engine then populates the resume/CV information into appropriate fields.
3. Verify that the information was populated correctly, editing as needed.
4. Click **Continue**. Add any codes and notes to assign to this record, if desired.
5. Click **OK**.

Adding a Contact

When the only information you have for a candidate is contact data; such as a name, address or phone number, and you would like to add this candidate to *BrassRing*, use **Add contact**:

1. From the Hiring Navigation icon , click **Candidates * Add contact**.
2. Enter candidate's name, address, phone number(s) and e-mail.
3. Click **Continue**.

4. Add any additional codes and notes to assign to this record, if desired.
5. Click **OK**.

- **Before adding candidates to *BrassRing*, best practice is to first search the database to see if the candidate already exists. If a candidate already exists, *BrassRing* will automatically find the duplicate file and merge the information. This is discussed later in details.**
- **Be sure the spelling is correct for all candidate information.**

Duplicate Candidates

- When being loaded into *BrassRing*, resumes/CVs are automatically parsed into candidate contact fields and those fields are checked to determine if the candidate's information is already in the system. In this process, *BrassRing* compares the incoming candidate's first name and phone number, then the first name and e-mail address against all the other resumes/CVs currently in the system. (The contact fields used to check for duplicates can vary and is determined by your organization.)
- If there is a match of this information, the new resume/CV and other information, such as forms, HR Statuses, and notes are appended to the existing candidate file. This makes the previously submitted (older) resume/CV a duplicate.
- Duplicates can be accessed by clicking on the hyperlinked duplicate resume/CV file you wish to view. The most recently loaded is listed as the **Current** file. Any others are listed in reverse chronological order from 1 up to 10.
- If a candidate applies multiple times to the same req, the Talent Record always displays the most recent resume submitted to that req by default.

Rivers, Kate Actions

378BR: Trainer - TR

Address 1: 2 Somerset Road
 Location: Boston, Massachusetts 01757
 Home phone: 555-473-0510
 Email: k.rivers@brassring.com

Candidate Type: Internal
 HR Status: Hired - Send to Onboard
 HR status date: 16-Dec-2016
 HR status updated by: Roundtree, Terry

Viewed (this req): N/A
 Last viewed (global): 20-Dec-2016
 Last viewed (global) by: Dunne, Jon
 Original date loaded: 15-Oct-2012

Notes: Add/View
 Forms: Add/View
 Communications: Send/View
 Attachments: Add/View

Profile

Contact Details **Resume** Cover letter Experience Education

Resumes: 29-Aug-2016 06:26:38

Kate Rivers
 2 Somerset Road,
 Boston, Ma. 01757
 (555) 473-0510
 k.rivers@brassring.com

SUMMARY OF QUALIFICATIONS:

[View Submission History](#)

Rivers, Kate - Submission History

Resume	Submission Date	Codes
Current	29-Aug-2016 06:26:38	AD03,367BR,00123
Duplicate 1	16-Aug-2016 06:43:34	US-HR-02,3448R,00123
Duplicate 2	14-Jul-2016 06:24:35	
Duplicate 3	14-Jul-2016 06:12:56	

Figure 4- 10: Duplicate resume/CV

- There are 15 duplicate stacking algorithms available. During implementation, your company selected one as the most appropriate.
- When eLinking or forwarding a Talent Record from Search results, a Working folder, My Inbox, or My Candidates, the most recent resume/CV is sent by default unless you opt to select a different duplicate to send.
- While BrassRing will display duplicates from the first up through the 10th duplicate. It allows for any req-specific duplicates to take precedent over any non-req-specific submissions. This means that if the 11th resumes/CV submission was made for a req you are currently working on, that 11th resume/CV would appear as part of the 10 listed within the Talent Record.

Stacking Duplicate Talent Records

The automatic duplicate check that BrassRing runs when resumes/CVs are uploaded into the system is highly accurate. However, there may be an occasion when you come across two talent records that were not stacked for the same candidate. The stack duplicates feature allows you to manually stack all of the information (with the exception of one of the two Overview sections) and merges it with the talent record that is selected as the current (i.e., most recently submitted) resume/CV.

Once you successfully completed the process of manually stacking duplicate candidates, you cannot ‘un-stack’ them.

To Stack Duplicate Talent Records

1. From a list of candidates, select the two candidates that are duplicates.
2. Click **Stack duplicate** from the Actions menu. A new window opens with the two overviews for the selected candidates. Refer to Figure 4-11.
3. Decide which record should be the current active record. (You may need to view both Talent Records in which case you will need to start over.)
4. Click Record 1 : 2 or Record 2 : 2 in order to review the two records you are considering stacking.
5. Click **Keep this candidate** to indicate the overview screen you wish to retain. This merges all of the other two Talent Record’s information, with the exception of the Overview screen you opted not to keep.
6. Click **OK** to confirm that you want to proceed with this action.

Stack duplicate candidates

Candidate overview
Record 1:2 | Record 2:2

Contact information

Name: Rivers, Kate
Address: 2 Somerset Road
Boston, Massachusetts 01757
United States
Phone: 555-473-0510
E-mail: k.rivers@brassring.com **URL:**

Experience summary

Employer	Position	Start year	End year
RAYTHEON	SOFTWARE ENGINEER	1999	2016
WANG LABORATORIES	SENIOR SYSTEMS PROGRAMMER	1996	1999

Education summary

Educational institute	Area of study	Degree	Grad year
School/Institution 1	COMPUTER SCIENCE	MASTERS	

Keep this candidate **Cancel**

Figure 4-11: Stacking duplicate resumes/CVs

Instafile

Autofile runs every 24 hours, but Instafile works in real-time manner, instantly filing (within seconds) a candidate based on their candidate type to the req folder to which they have applied. Like the Autofile, Instafile is not saved by any one user. Rather it is already turned on and runs for your entire organization. If Instafile identifies candidates who have applied to a specific req, it will not only file the candidates, but will also send an e-mail notification of each candidate filed to that req.

Instafile accelerates the filing of candidates submitted through Talent Gateways and/or Agency Manager to your organization's requisitions, but like any resume/CV loaded into BrassRing, up to two hours may pass prior to the candidate data being fully searchable.

Candidates in Queue & Referrals in Queue

Available from the Candidates menu, *Candidates in queue* and *Referrals in queue* allow you to access resumes/CVs entered via a Talent Gateway, Add contact or Add candidate. Refer to Figure 4-12. Resumes/CVs can remain in this holding bin for up to 2 hours, after which time they are indexed and all of their extracted data becomes fully searchable via Candidates>Search.

- **Your organization may have set Instafile to automatically assign one of your starting HR statuses, such as Initial Screen, to candidates filed to the req folder when they apply. This feature can be set to accommodate companies with multiple req templates.**

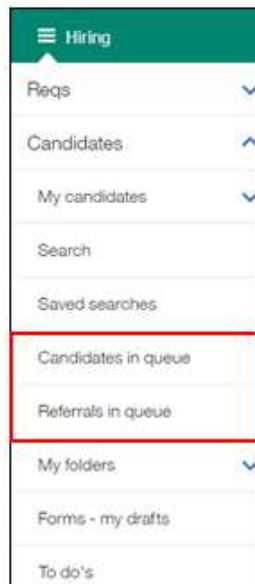


Figure 4-12: Candidates in queue & Referrals in queue

Using Codes to Track Resumes/CVs

Codes are the means in which your organization is able to track how many responses you received for an ad or job posting, or the number of candidates hired from each of the sources you use. They are stored and maintained within tables found in *BrassRing*.

Elements of Codes

- Codes facilitate searching, allowing you to search for candidates who, for example, have responded to your specific req.
- When a code attached to a candidate's record becomes inactivated, it appears with a strikethrough. For example: ~~NHJB~~.
- Super Users must enter new codes into BrassRing prior to their use in advertising.
- If your company is using Talent Gateways, codes are being captured automatically.

Elements of Codes

There are three standard types of codes:

Code	Description	Example
Job Code	Identifies the Job title	HRM01 for HR Manager
Source code	Identifies where resume/CV specifically came from	MNSTR for Monster.com
Req code	Identifies the req; generated when the req is created	152BR

In addition to these standard codes, your company may have created other codes for additional tracking purposes. Examples of additional codes are: Business Unit, Division, Recruiter, and School.

The Code String

Placing together multiple codes with a forward slash (delimiter) creates a codes string:

HRM01,MNSTR,152BR

This code string would indicate the candidate is applying for the HR Manager position submitted through Monster.com for requisition number 152BR.

Chapter Summary

- Resumes/CVs can be entered into BrassRing by candidates and recruiters.
- Autofiler places resumes/CVs into the req folder to which the candidate applied every 24 hours.
- Instafiler places resumes/CVs into the req folder to which the candidate applied within seconds of the resume/CV being submitted.
- Resumes/CVs are entered immediately through a Talent Gateway, Add candidate, or Add contact.
- When BrassRing matches a candidate's contact information with an existing one, the new resume/CV is appended to the existing candidate file. This causes the previously submitted resume/CV to become a duplicate.
- IBM extracts up to 20 pieces of information from each resume/CV.
- There are three standard types of codes: Source, Job and Req. Your company may capture other codes as well.
- Codes provide the ability to effectively track resumes/CVs.

Check Your Skills

Answer these True or False Questions:

1. Candidates can use Add candidate to submit their resume/CV information.
2. Resumes/CVs cannot be entered into BrassRing manually?
3. It is best practice to have a new code entered into BrassRing prior to advertising.
4. Candidates should not send cover letters since IBM does not process them.

Answer the following short answer questions::

5. What should you do when you receive a resume/CV via e-mail and you want to get the information into BrassRing immediately?

6. What should you do if you want to post a job using an advertising source that is not listed in the Source code list?

Chapter 5: Screening Candidates

Chapter Overview:

Once qualified candidates have been identified for your position, you can then move the candidates through your company's defined hiring process. Typically, this is performed within the req folder.

The first phase of candidate tracking involves screening the qualified candidates you may have sourced. Screening candidates entails reviewing resumes/CVs, speaking with candidates, and documenting your conversations, all of which *BrassRing* facilitates.

Objectives:

At the end of this chapter you will be able to:

- View candidates in the req folder
- View resumes/CVs.
- Add a note to a candidate's Talent Record.
- Initiate the HR status on candidates to track through your organization's unique hiring process.

Overview of Output Grid

To start the screening process, you will review your candidates in the req folder, as seen in Figure 5-1. From here you view the resumes/CVs and begin the decision making process of whether to move the candidate(s) to the next stage (i.e. phone screen, interview, etc.).



Candidates in: 367BR									
Showing 6 of 6									
Actions									
<input type="checkbox"/>	Name	Viewed	Date Last Viewed	Notes	Forms	Candidate Type	HR Status	HR Status Date	Communications
<input type="checkbox"/>	Thaler, Chris		08-Sep-2016			External	0-Filed	30-Aug-2016	
<input type="checkbox"/>	Godwin, Gary					External	0-Filed	30-Aug-2016	
<input type="checkbox"/>	Gray, George					External	0-Filed	30-Aug-2016	
<input type="checkbox"/>	Jones, Brian					External	0-Filed	30-Aug-2016	
<input type="checkbox"/>	Rivers, Mike					External	0-Filed	30-Aug-2016	
<input type="checkbox"/>	Smith, Jeff					External	0-Filed	30-Aug-2016	

Figure 5- 1: Candidates in Req

Output Grid Management

Column headings that reside in a grid and display candidates (or reqs) are output fields. Your organization opted for certain output fields to appear as defaults in *BrassRing*.

Output fields are based on the information that is fielded from resumes/CVs, providing you with a quick look at a candidate's most recent information, such as specific contact, employment or education information.

Elements of Output Fields and the Output Grid

- The candidate's name, whether or not you viewed the candidate, if he/she is an Agency referral (if applicable to your company); Notes, Forms, and HR status icons; most recent Candidate type and Last codes are standard output fields. Resume/CV info (e.g. Position held, Employer, Educational institute) can also display as output fields.
- To move between pages of results, click the desired numeric group of results from the Show results menu, or use the > - sign at the bottom of the page.
- You can modify the output grid to use only those fields that are most helpful to you. Modification options for the output grid include: dragging and dropping, freeze/unfreezing, resizing, and hiding/showing output fields.




- The req and candidate output grids allow for 3 of your grid selections to be used for multi-sorting-used in succession for sorting columns.
- The Codes field displays the most recent code (e.g. source and job) information for candidates, and is assigned each time a candidate applies through a Talent Gateway. Based on your user type, you may click on the hyperlinked string of codes to access a candidate's code history.
- You can sort the results by clicking any of the column headings once for ascending order (123/abc) and once again for descending order (321/cba).

You can export candidate and req grids to a Microsoft Excel spreadsheet. The content exported to the Excel spreadsheet depends on the size of the results set:

- **If the results set is 50 rows or fewer, the entire results set is exported to the Excel spreadsheet. You have to export each page in a separate action.**

To Stack Duplicate Talent Records

The column headings on the search results page can be modified using these steps:

1. Select the **Table Display** icon  .
2. In the **Available Columns** list, highlight the fields to add to the output criteria and click  to move them to the **Selected Columns** window. Highlight and click  to return them to the **Available Columns** list.
3. To reorder fields within the **Selected Columns** list, click on the field then drag and drop the field to the appropriate position.
4. Click **Submit**.

Additional Output Grid Management Options

In addition to editing output fields, *BrassRing* offers additional manipulation of candidate and req output grids, supporting: drag and drop placement, column resizing, hide or show standard columns, and advanced sorting.


- Click the drop-down arrow in the column header and select **Pin Left or Pin Right** to pin a column all the way to the Left or Right side of the output grid.

- Un-Pin by clicking the drop-down in the column header and selecting **Unpin**.
- Re-size columns by clicking on the column border and sliding the mouse to the right or left. Hide columns by resizing the column small enough that it does not display (similar to MS Excel).
- Re-order columns by clicking on the selected column dragging and dropping where desired (similar to MS Excel).
- Alphabetize the options in a column by clicking the column name. A ▲ will indicate the column is sorted A-Z and ▼ will indicate the column is sorted Z-A.

Advanced Sorting

The output grid reveals two buttons: Filters and Advanced Sorting options. These allow you to configure quick filter list options by HR status and/or Candidate type columns. Sort options allow you to configure multi-sort columns and column sort defaults.

To edit the Sort options:

1. From the display of search results, click the **Advanced Sorting** icon .
2. Select up to three different criteria for sorting the output grid display, using the radio button to indicate Ascending (the default) or Descending order.
3. **Sort by:** Select the 1st criterion to sort the output grid by. The column selected for the first sort is applied to the entire output grid.
4. **Then by:** Select the 2nd criterion to sort the output grid by. The column selected here is the second sort applied to the entire output grid.
5. **Then by:** Select the 3rd criterion to sort the output grid by. The column selected here is the third sort applied to the entire output grid.
6. Next, choose **Apply Sort**.

Viewing a Talent Record

To view a Talent Record, click the link of the candidate's name. Talent Records provide access to all pertinent candidate info: notes, forms, HR Status, eLink history, interview schedules, communication history, and resumes/CVs. (Figure 5-2).

Rivers, Kate Access

12489; CAT - Assistant HR Mgr
 Address: 12 Somers Road
 Location: Boston, Massachusetts 02117
 Home phone: 331-473-0310
 Email: k.rivers@brassring.com

Candidate Type: Internal
 HR Status: 0-Filed
 HR status date: 28-May-2018
 HR status updated by: Jackson, Allen

Viewed (this req): N/A
 Last viewed (global): 28-Jul-2017
 Last viewed (global) by: Akins, Claudia
 Original date loaded: 19-Oct-2012

Notes: Add/View
 Forms: Add/View
 Communications: Send/View
 Attachments: Add/View

Employer: RAYTHEON
 Position held: SOFTWARE ENGINEER

Profile

Contact Details **Resume** Cover Letter Experience Education

Resume: 28-Aug-2016 06:26:38 View Submission History

Kate Rivers
 12 Somers Road,
 Boston, MA 02117
 (331) 473-0310
 k.rivers@brassring.com

SUMMARY OF QUALIFICATIONS:

Activity

Action Log **Forms** Attachments Notes HR Status Communications eLink Agency

Action	Date	Action By	Details	Name/Type	From	To	Folder
HR Status - Updated	24-Jul-2017 12:20:02	Money, Linda		Current Status		0-Filed	Working Folder Transfer Example
HR Status - Updated	24-Jul-2017 12:20:02	Money, Linda		Current Status		0-Filed	My Sample Training Folder

Figure 5- 2: A Talent Record

Prepare for Bulk Print

You have the option to print specific areas of a single Talent Record via Bulk Print:

1. From within a Talent Record, go to the Actions menu and select **Prepare For Bulk Print**. This launches the Prepare for Bulk Print screen.
2. Select the checkboxes to indicate which parts of the Talent Record you wish to print and click **Send**.
3. The user who initiates the bulk print will receive an email with a link to view or print the information.

■ If a resume/CV being viewed displays duplicates, and is being viewed within a req folder, any req-specific duplicates (submissions made more than once for the same req) will be displayed on the Submission History screen which is accessible by clicking the *View Submission History* button located in the Profile section of the Talent Record.

Viewing Multiple Resumes/CVs

1. From the list of candidates, select all candidates of interest.
2. From the **Actions** menu, click **View**. *BrassRing* displays the first candidate's information. To move from this candidate to one of the other records, click the drop-down arrow next to the candidate's name of the resume/CV that is currently being viewed. A list of the other selected candidates will appear in a drop-down list. (See Figure 5-3).

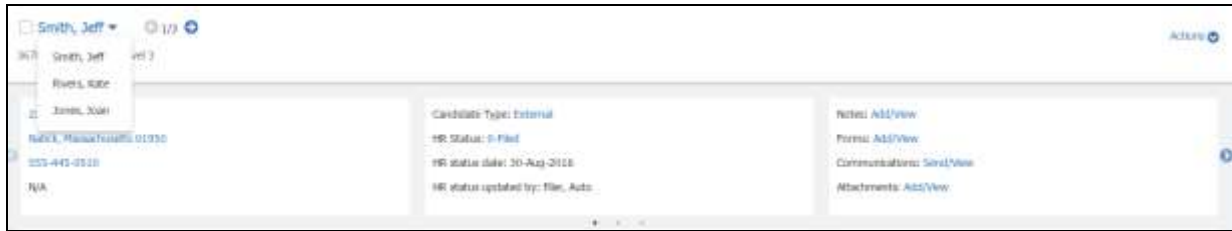


Figure 5- 3: Viewing multiple resumes/CVs

Speed Browse


Speed browse allows the user in *BrassRing* to review information for multiple candidates side-by-side. You can change the **showing** number of candidates to five resumes at once.

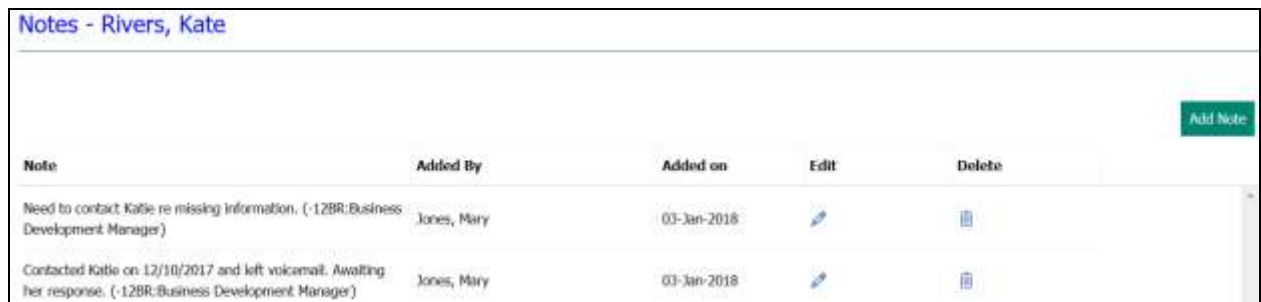
1. From the list of candidates, select all candidates of interest within a candidates result panel (e.g. Candidates in: 49BR: Administrative Assistant or My Candidates)
2. Click **Speed Browse** in the Actions menu.
3. BrassRing will display the first 5 candidates selected. Use the arrow to go to additional candidates.
4. You can also take action on these candidates by checking the box next to the candidates' name and selecting the appropriate option from the Actions menu.

Candidate Notes

In *BrassRing*, document your conversations and e-mail dialogues with candidates, managers and others by adding notes. Notes can also be used to set reminders for future actions you need to take, such as calling a candidate to arrange an interview.

Elements of Notes

- Notes are discoverable and remain with the Talent Record as it travels to various folders and people.
- Notes can be designated as public or private. Notes specified as My notes are private- only you and your Super Users can view these.
- The notes icon  appears when candidates have notes attached to their Talent Records.
- You can add a Reminder date to your note. This will automatically place a reminder in your To do's (found in the Candidates menu).
- When adding a note to a candidate record from a req folder, that req number will appear in the note.

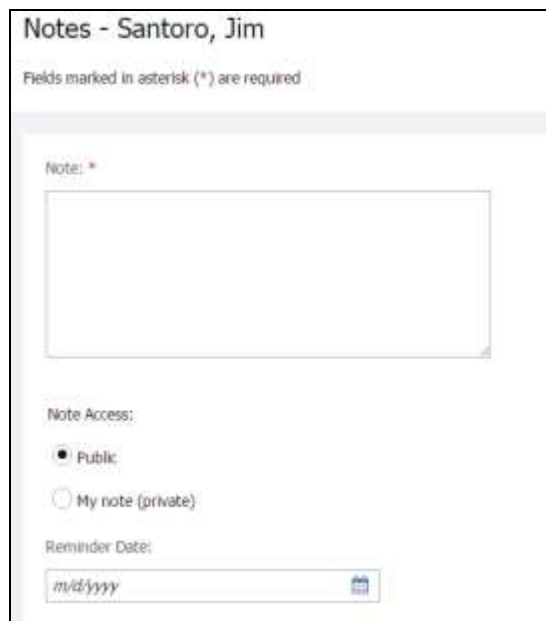


Note	Added By	Added on	Edit	Delete
Need to contact Katie re missing information. (-12BR:Business Development Manager)	Jones, Mary	03-Jan-2018		
Contacted Katie on 12/10/2017 and left voicemail. Awaiting her response. (-12BR:Business Development Manager)	Jones, Mary	03-Jan-2018		

Figure 5- 4: A Candidate Note

Adding Notes

1. Click the **Note** icon, using either the or the .
2. Click **Add note**. You may type notes from discussions, copy and paste e-mails, etc. into the message box. See Figure 5-5.
3. (Optional step) To add a reminder, click the calendar icon next to the Reminder date field.
4. (If available) If you want to be the only one who can see this note, click **My note (private)**.
5. Click **Save**. A confirmation message appears. Click **OK**.



Notes - Santoro, Jim

Fields marked in asterisk (*) are required

Note: *

Note Access:

Public

My note (private)

Reminder Date:

m/d/yyyy

Figure 5- 5: Adding a note

To gain the most benefit, designate notes as Public. Remember to include only information in the candidate record that is appropriate.

To do's

Your list of To do's in *BrassRing* enables you to keep track of tasks you need to accomplish.

To view your To do's:

1. Click Candidates * To do's.
2. Click the **Notes** icon to read the details of the reminder you set.
3. After completing the reminder task, click the Mark completed icon. Completed tasks can be accessed later via the link at the top of the To do's window (Completed to do's).

Actions	Status	Name	Viewed	Errors	Notes	HR Status	Candidate Type	Recycle Date	Added On	Mark completed
Mark completed Close Add	Select all	Candidate Search					Subtotal	10-Mar-2012	10-Mar-2012	Mark completed

Figure 5- 6: To do's

Initiating HR Status

The HR status describes where a candidate is in the hiring process. Visible within *BrassRing*, the HR status is also a significant communication tool upon which reporting metrics are based.

Companies usually identify each step or phase in their process and create an HR status to reflect each one.

Some examples of an initial HR status include:

- Applied
- HR review

HR Status History

The HR Status History is extremely helpful because it allows the user to see the other folders the candidate is residing in, the current HR status the candidate is on in that particular folder, the date the candidate was moved to the HR status, and the user who moved the candidate to that HR status (it will also identify if the system moved the user to the HR status). This information is beneficial if you are interested in pursuing the candidate.

The HR Status History column and its icon in the output grid are significant. If an icon displays in the column, it shows the Req ID for the req, other than the current req, with the most recent status update.

- A Yellow icon indicates the candidate is most recently updated for that other req.
- A Red icon indicates the candidate was most recently updated to a start or intermediate HR Status for that other req. (Neither the initial HR Status nor the final HR Status.)
- A Gray icon indicates the candidate was most recently updated to the final HR Status for that other req. By clicking on the hyperlinked number, a screen displays identifying the HR

Status History for that candidate. Recruiters can also toggle between the Current status and Status history views on this page (Figure 5-8).

Name	Viewed	Date Last Viewed	Notes	HR Status History
Donner, Charlie		26-May-2016		358BR
Lang, Tom		07-Dec-2017		335BR
Price, Kathy		07-Dec-2017		116BR

Figure 5- 7: HR Status History column

HR status date	Folder	Req ID	Req/Folder	Updated by	HR status (click to update)	Prior status
29-Aug-2017		795	Core System Engineer - BrassRing	Manager, Automation ()	Recruiter Review	Applied
12-Jul-2017		335	Sales Rep	Support (ntrumble), BrassRing ()	Hired	Pre-Hire Activities

Figure 5- 8: HR Status History Page

BrassRing displays the HR status in one of two ways: 1) in sequential order, so that you take a candidate through a defined progression of steps; or 2) in a complete list of all statuses, so that you can choose the most appropriate step and move between steps. Most organizations use option 1, as it facilitates more effective reporting on applicant flow.

Elements of HR Status

The following are important considerations regarding HR statuses:

- Designating an HR status is done from within a folder or as a candidate is being filed to a folder.
- The same candidate can move simultaneously through different hiring cycles within different folders, as the candidate may have applied to many jobs.
- Any member of a req or working folder can update the HR status of a candidate filed to that folder.
- It is possible to undo an HR status and go back to the previous HR status.
- If undoing an HR status will move a candidate to an HR status your assigned user type is prevented from seeing, you will see the following message: An undo HR status action will not allow you to view this candidate. You can close the message at this point. This prevents you from removing the candidate from your view.

- To view historical status information about a candidate, open the candidate's profile and go to the HR status tab.
- Your company may have associated a *BrassRing* form with an HR status. For example, when you update a candidate to Phone screen, the Phone screen form might pop-up for you to complete in a new window.
- With the consistent, timely use of HR statuses, accurate reports can be generated.
- If enabled for your user type, when you update the HR status on a candidate, the candidate can be accessed from Candidates>My Candidates.
- Based on your User Type, you may or may not be able to view candidates assigned to certain HR statuses in req folders.
- Your company may have opted for a feature that states when specific HR statuses are assigned within a req folder, candidates are automatically sent an e-mail message.

Initiating HR Status

To initiate or update the HR status for a candidate:

1. From a list of candidates, click the link for the chosen candidate that is under the column **HR status**. The **Update status** screen displays the status options for the candidate.
2. Click the appropriate **HR status**.
3. Click **Save** to save the new status and close the screen.
4. By clicking **Advanced Options** you can change the **Action date** which defaults to the current date, but a past or future date may be assigned. The **Action date** identifies the day the candidate was moved to the HR Status, it does not physically update the HR Status.
5. If available, the field **Notify users working with this candidate** triggers a mass e-mail to any BrassRing users who, like you, have that same candidate in an active folder of their own.

The new Status, Action date, and Date updated will display in the folder in which the candidate is filed. Refer to Figure 5-8 for an example of updating HR status.

- **Your company has determined the HR statuses to be used within your organization. Therefore, if your organization is using multiple req templates, the initial/default HR status of 0-Filed may have been replaced by another option.**
- **The Action date is the date that the HR status was assigned. This date can be set to a past, present or future date. The day that the HR status is updated is also recorded within BrassRing.**

Update HR Status - Smith, Jeff

Fields marked in red text (*) are required

Current HR status

HR Status: 0-Filed

Updated by: HRM, Auto

User: MTRM-Administrator level 3

Update HR Status *

Select an HR Status: [Dropdown]

Action Date: 1/2/2018 [Calendar]

Notify users working with this candidate

Figure 5- 7: Updating HR status

Update and Add Next

To process a candidate through several status levels at one time, you may use **Update and add next**. This processes the current update and refreshes the screen so you can immediately select the next HR status. To use update and add next:

1. From a list of candidates, click the link for the chosen candidate under the column **HR status**. The **Update status** screen displays the status options for the candidate.
2. Click Advanced Options.
3. The **Action** Date may be adjusted to display the date the candidate went through/will go through that particular phase of your hiring process.
4. If available, the field **Notify users working with this candidate** triggers a mass e-mail to any BrassRing users who have that same candidate in an active folder of their own.
5. Click **Update and add next**. The screen refreshes and allows you to move the candidate to the next HR status of your choice.
6. When you finish assigning the last HR status you wanted to assign, click the **Update** HR Status button to close the window and return to the candidates listed within your req folder.

■ If your organization opted to restrict your ability to view candidates assigned to specific HR statuses, you may still update candidates in a req to that HR status, but upon your browser refreshing, they will not appear in the req folder.

Chapter Summary

- The Output fields that display can be changed.
- You can document your conversations and e-mail dialogues by adding notes.
- Notes are discoverable.
- The HR status icon allows the user to see the other folders the candidate is residing in, the current HR status of a candidate in a particular folder, the date the candidate was moved to the HR status and the user who moved them to that HR status (it will also identify if the system moved the user to the HR status).
- The HR status describes where a candidate is in the hiring process.

Check Your Skills

Answer these True or False Questions:

1. The checkmark appears in a list of candidates after you have viewed the Talent Record.
2. The HR Status icon allows you to view the other folders in which the candidate is currently residing.
3. When you set a reminder date on a note, a reminder is added to the to-do's list.
4. You can post-date an Action date while updating the HR status.

Complete the following hands-on exercises:

4. Access a list of candidates in an open req.
5. View the Talent Record of two candidates who are in the open req found in the last step.
6. Initiate the HR status for one of the candidates.
7. Add a note to the other candidate.

Chapter 6: Tracking Candidates

Chapter Overview:

BrassRing facilitates an efficient, online staffing process and centralizes communication between members of your staffing organization to both hiring managers and candidates. This is a key to helping you move candidates through the hiring pipeline efficiently. Two features that accomplish this are forms and eLinks.

You learned in Chapter 5 about screening candidates; now we will look at how to manage the tracking of candidates through your hiring process within *BrassRing*.

Objectives:

At the end of this chapter you will be able to:

- Access and complete a form.
- eLink a resume/CV along with a form.
- Review and respond to an eLink.
- eLink a blank form by itself to be completed by the recipient.
- Send e-mail and letter correspondence

BrassRing Forms

You can add/complete and view your company's completed forms within BrassRing. Forms are used to capture and store all types of information related to your hiring process. Examples of forms companies typically use include Phone screen, Interview evaluation, and Offer form. Similar to req forms, candidate forms are available in different language options.

Here is an example of a form:

The screenshot shows a web form titled "Add Form" for a "Candidate Form: Interview Evaluation - Foder, cts". A note indicates that fields marked with an asterisk (*) are required. The form contains the following fields: "Requisition ID" with the value "36788", "Job Title" with the value "Administrative level 1", "Date of Interview" with the value "mm/yyyy", "Interviewer 1", "Interviewer 2", and "Communication Skills" with a dropdown menu showing "Choose...". At the bottom, there are three buttons: "Submit", "Clear", and "Cancel".


Figure 6- 1: A form

Elements of Forms

- Depending on your user type, you may or may not be able to view, update and/or delete certain forms.
- When an asterisk displays adjacent to a field on a form, the field is required.
- There may be some fields on your forms that are encrypted. This means that the information provided on that form is secure. Users with access to view or update a form with encrypted fields can view the decrypted value for the field.
- You can also send a form for someone else to complete. The action is called **eLink blank form**.

Accessing Forms

Forms can be accessed in a few different ways:

1. While viewing a candidate's Talent Record, via the Forms tab.
2. By clicking the forms icon  while viewing a req folder's candidates.
3. While viewing candidate search results.
4. While viewing an eLink.

Adding Forms

To add a form:


1. From a list of candidates, click the **forms** icon  .
2. Select the form to add from the drop-down menu.
3. Click the button marked **Add**. See Figure 6-2.
4. Complete all required fields (*) and any appropriate optional fields, then click **Submit**.




Figure 6- 2: Accessing and adding forms

Sending a Blank Forms

You may use eLinks to send a blank form to someone to complete, such as to hiring manager to complete an interview form.


To send only a form to be completed (not the form along with the resume/CV):

1. From a list of candidates, click the **forms icon**  .
2. Select the form to send from the drop-down menu.

3. Click **eLink blank form**. See Figure 6-3.
4. Address the eLink as follows:

If receipt is a ...	Then
User of BrassRing	Select the name from the System users list.
Not a User of BrassRing	Type the complete e-mail address in the box provided for E-mail address.

5. Type a message to the recipient.
6. Click **Send**. A confirmation message appears.

- **Completed forms can also be eLinked to be viewed only. At the top of the Send eLink window, use the toggle labeled eLink form to: Select View.**
- **If applicable, when viewing a list of forms, select the history icon  to display a PDF list of versions of the form along with dates and names of users that saved the form.**
- **Your company may have opted to use eLink Form Approval which allows you to route completed forms for approval. Requests for approval are sent to all recipients simultaneously via eLink.**

eLinking Candidates

Another step in the tracking process facilitated by *BrassRing* is getting information about screened candidates quickly without having to rely on getting paper documents into the hands of hiring managers for their review and comment. We accomplish this within *BrassRing* by using eLinks.

What is an eLink?

You can use eLinks to send resumes/CVs and/or forms to hiring managers via e-mail. Without logging on to *BrassRing*, hiring managers may be able to perform actions such as:

- View resumes/CVs sent to them.
- Complete a blank form that was sent to them.
- Review an already completed form that was sent to them.
- Send comments back to the sender via e-mail.

- Review any file attachments that may have been included, such as the PDF of the candidate’s resume/CV.
- Suggest or update the candidate’s next HR Status.



Figure 6- 3: eLink as it appears using e-mail

Your company may have opted to have eLinks be sent as attachments, rather than embedded in the text of the e-mail, as we see in Figure 6-3.

When the recipient clicks on the link, the eLink launches. See Figure 6-4.



Figure 6-4: The candidate resume/CV eLink

Elements of an eLink

- When eLinking a candidate from within the req folder, the resume/CV (and, if the candidate uploaded their resume/CV when initially applying, the PDF version of that resume/CV) corresponding to the specific req submission is sent by default.
- BrassRing automatically records in eLink history the recipient’s name and the date the eLink was sent, viewed by the recipient and responded to by the recipient.

- The recipient's response may also be automatically recorded in the eLink history section of the candidate's Talent Record; if your company has activated this feature.
- The sender of the eLink will receive confirmation of receipt e-mail as well as an e-mail with the recipient's response to the eLink (once the recipient responds).
- If sent by the BrassRing user, notes are visible based on the User type settings of the recipient (Quick Start User type).

 **You can send an eLink while viewing a resume/CV anywhere within BrassRing.**

 **Both you and the eLink recipient should have the pop-up blocker off to view PDFs.**

Sending an eLink

To send an eLink:

1. From a list of candidates, select the checkboxes for those candidates you wish to send via eLink.
2. Click Send **eLink** via the **Actions** menu.
3. Address the eLink as follows:

If receipt is a...	Then
User of BrassRing	Select the name in the system users list.
Not a user of BrassRing	Type the complete e-mail address in the e-mail address field.

4. The **Subject** field contains default information, but it can be changed.
5. In the **Your message** field, you can add a message which will be viewed by the eLink recipient of the eLink and located in the body of the e-mail.
6. The **Forms to complete** field includes blank forms that must be filled out by the recipient of the eLink. If you include forms to complete, you will likely want to check the field to **Notify me when these forms have been submitted**. This insures you will be sent a confirmation message via your e-mail once the form(s) have been completed and thus returned to *BrassRing*
7. The **Forms to view** field includes a list of completed forms that are assigned to each candidate — the forms are for viewing only, not editing.

8. Decide if you want to **Include HR status** and click that checkbox if you do. This shows the recipient all the folders the candidate you are sending is filed to, what their HR status is within those folders, and which recruiter is assigned to them. If your company is using the feature, the recipients will also be able to update or suggest the next HR status(es) of the candidates you are sending.
9. If you would like to include Notes, Associated Document sub Forms, or Req Information, put a check mark in the applicable boxes.
10. Click **Send**.

The screenshot shows a web form for sending an eLink. It has the following sections:

- Email address:** A text input field with a placeholder and a note "Separate with a comma".
- cc:** A list of email addresses.
- BCC:** A list of email addresses.
- Content:**
 - Subject:** A text input field containing "eLink ID: 323BR: Financial Accountant: Ashley Royal".
 - Your message:** A large text area for the email body.
 - Forms to complete:** A dropdown menu.
 - Notify me when these forms have been submitted

Figure 6- 5: Sending an eLink

- **If your company opted to enable the eLink Cc/Bcc feature, then you may copy or blind carbon copy recipients when sending eLinks. Copied recipients receive an e-mail containing a summary of the original eLink details (e.g. who received it, what forms were attached, etc.).**
- **If an eLink has been sent from search results, My Candidates, the Inbox or Working folders, the most recent resume/CV is sent, unless the sender explicitly selected a different duplicate to send.**

Reviewing eLinks

To review and respond to an eLink:

1. Open the e-mail message. Click the link composed of the candidate's name (and any additional information, such as title and employer). This launches the eLink in your Web browser.

2. Click the **Overview**, **Text resume/CV**, **PDF resume/CV**, **Forms**, **Notes** or **HR Status** tabs to access the information the sender included.
3. To complete a blank form or view a completed form, click **Forms**. Refer to Figure 6-6. Click the **form name** to either view or complete the form(s) sent. When you complete a form, the information is automatically updated in *BrassRing*.
4. When you have finished reviewing the eLink, either close the window as you normally would, or click **Respond** to send comments back to the sender via e-mail.

Forms to view				
Last action date	Form	Last edited by	Date added	Added by
15-Sep-2013	Deposit Form 12345 Administrative Assistant	Lon Moore	15-Sep-2013	Lon Moore

Forms to complete					
Last action date	Form	Last edited by	Date added	Added by	Form completed
There are no forms to complete.					

Figure 6- 6: Reviewing the Forms section of an eLink

- **If your company opted to enable the PDF to be the default when an eLink recipient opens an eLink, that image would display, as opposed to the text version of the resume or the overview of the resume data. In addition, the PDF will only display where the most recent resume/CV was submitted using the Upload option.**

Responding to eLinks

To respond to an eLink:

1. Click the link in your e-mail to open the eLink. Click the button marked Respond located in the top right of the window.
2. If available, suggest the next step from the Request drop-down menu. See Figure 6-7. The selection made here will not update the HR status in BrassRing, as this is the recruiter's role within BrassRing.
3. To add a message, type it in the Note text field and, if available and when appropriate, check the Save this text as a note option to add the text as a note in the candidate's Talent Record.
4. Click Send.

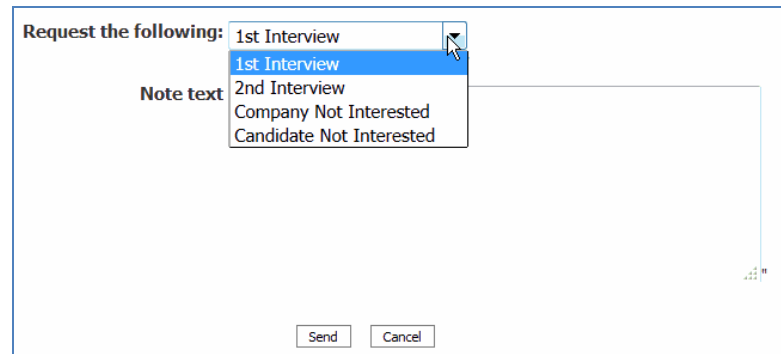


Figure 6-7: Responding to an eLink – replace screenshot

- ▶ **If an eLink has been sent from search results, My Candidates, the Inbox or Working folders, the most recent resume/CV is sent, unless the sender explicitly selected a different duplicate to send instead.**
- ▶ **When a recipient selects an option in Request the following, the sender will receive an e-mail with that information. The candidate's HR status is not updated.**
- ▶ **Your company may be capturing hiring manager's comments in the eLink history section of the Talent Record.**

Sending Communication

The Communications module provides you with the ability to send correspondence to candidates directly from within *BrassRing*. You can send an e-mail template, generate and print a letter using MS Word, or submit a letter for batch processing by a colleague or yourself later.

Elements of Communication

The following are important details regarding Communications:

- The e-mail, document and letter templates have been defined by Super Users at your company.
- Blurbs are pieces of frequently used text created by Super Users that can be inserted into an e-mail message.
- BrassRing forms and links to job details posted to a Talent Gateway can be sent as part of the e-mail templates the Super User maintains.
- E-mail, Documents, and Letters can be sent to up to 200 candidates simultaneously. Each e-mail recipient receives an individual e-mail.

- Letters are created by merging an MS Word™ document with information provided on BrassRing forms and candidate profiles.
- Documents are created with MS Word™ or Text Editor and pull information provided on BrassRing forms and candidate profiles.
- View a candidate's Correspondence history by clicking the tab marked **Communications** within a Talent Record.
- You can either generate a letter to print it yourself to send or direct it to a folder for batch processing later.
- E-mails can be personalized before they are sent. Letters can be personalized after they are merged into MS Word.
- Documents can be personalized before they are saved to PDF, on a candidate's Talent Record, and either e-mailed to a candidate or posted on the Candidate Zone/Portal.
- Offer letters can be set by Super Users so that they are visible only to req team members.

Sending a Communication Template

BrassRing allows you to easily send e-mail to candidates by selecting an e-mail template. These templates contain embedded greetings, merge tokens, Talent Gateway job links, forms and attachments for messages you frequently send to candidates, such as a Thank You after interviewing.

To send an e-mail:

1. Select a candidate from the list and click **Send communication** via the Actions menu.
2. Select the appropriate template from the **Communication template** field and click the button marked **Go** to the right of the drop-down. Refer to Figure 6-8.
3. The e-mail template appears. Confirm and/or complete the **From** and **Subject** lines, as well as the e-mail's **Message Body** text. Use the text editor and spell check options to assist you. Refer to Figure 6-10.
4. Select any attachments you may wish to upload and include with your e-mail. Any attachments you are able to upload to the e-mail are available in the **Upload attachments from Talent Record** field on the bottom right of the e-mail template. Refer to Figure 6-11. Select the attachment(s) you would like to attach and select the **Upload** button. The selected attachment(s) will appear in the box below the upload button.
5. To upload multiple attachments as a zip file. Go to the **Upload attachments** section of the page and click **Select Multiple Attachments**. On the Select Files to Upload window, select

Browse and go to the directory that contains the files you want to attach. Right-click to open the **Select** menu, select **Send to > Compressed (zipped) folder**. The .zip file is saved in the same directory, where you can rename it. Select **Open**. The file path name is added to the browse field in the Select Files to Upload window. Select **Upload**. The .zip file is added to the attachments grid.

6. Select a Super User defined **Blurb** of text or **Link to job(s) on Talent Gateway** to insert into your message.
7. Under **Candidate and Merge Information**, the applicants you selected display. If an e-mail address does not exist on the candidate's Talent Record you will see the default e-mail address of communication-archive@brassring.com. This address automatically adds the communication you are sending to the candidate's Message Archive section within the Responsive Talent Gateway Candidate Zone.
8. Click **Preview** if you wish to review your e-mail prior to sending.
9. Click **Send**.

Figure 6-8: Selecting E-mail template

- A candidate's e-mail address will populate only if one was provided by the candidate while filling out their contact information. If no resume was provided, you will see communication-archive@brassring.com instead.
- You know a form is included in the E-mail template if the checkbox **Notify me when this form is submitted** appears.
- Your company may have configured an e-mail communication to be automatically sent, with or without a form, to a candidate once a candidate has been filed to a req folder.
- When a user sends a communication on a requisition that is available in multiple languages, a new page is displayed in which the user can select the language of the communication.

Figure 6- 9: Sending an e-mail

Figure 6- 10: Adding an attachment to an e-mail

When sending an e-mail template to multiple candidates, each candidate receives an individual e-mail and is not copied on the others' correspondence.

- Should you decide not to use an e-mail template when communicating with the candidate, you may select the **Send candidate ad-hoc e-mail** option from the **Actions** menu to create your own e-mail. A copy of the e-mail is stored on the Candidate Talent Record under the **Communication Tab**.

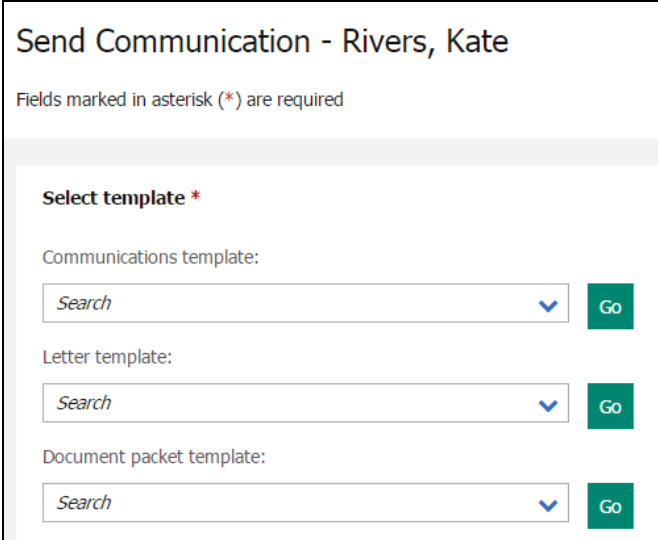
Sending a Letter

Sending letters is similar to sending E-mail templates with one exception. With Letters, information entered on BrassRing forms merges with pre-formatted document in MS Word™.

To generate and print a letter to send:

1. Select a candidate(s) from a list of candidates.
2. Click **Send communication** via the **Actions** menu.
3. Select the appropriate **Letter template**. See Figure 6-12.
4. Click **Go**. The **Send communication** screen appears.
5. If there are fields missing that need to merge into MS Word, click link of the number if missing fields, then click the **Edit/Add icon**. Refer to Figure 6-13.
6. Complete the missing fields.
7. Click **Continue**.
8. (Please read the note to the right regarding your pop-up blocker)To print the letter immediately, select **Generate Letter now *** OK. Refer to Figure 6-14 for a preview.

🔴 **Contact your Super Users/System Administrators to make comments or suggestions about E-mail or Letter templates.**



The screenshot shows a web form titled "Send Communication - Rivers, Kate". Below the title, it states "Fields marked in asterisk (*) are required". The form contains three sections for selecting templates, each with a search input field and a "Go" button:

- Select template ***
 - Communications template: Search [dropdown] Go
 - Letter template: Search [dropdown] Go
 - Document packet template: Search [dropdown] Go

Figure 6- 12: Selecting a letter template

The table below represents the form(s) and form field(s) used in this communication. If multiple instances of the same form exist, the most recently added or edited version of the form has been pre-selected for you. Each "Missing merge field(s)" number displays the number of fields missing from the form. However, these fields are not required to complete this communication. Clicking a numbered link displays a list of the optional missing form fields. To update any missing optional merge fields below, add or edit the appropriate form(s).

	Select form	Form title	Date/time edited	Edited by	Missing merge field(s)	Edit/Add
Kate Rivers	<input type="radio"/>	View overview	06-Jan-2014	Smith, Mary	0	<input checked="" type="checkbox"/>
	<input checked="" type="radio"/>	Requisition-374BR:eLearning Consultant	13-Sep-2016	Smith, Mary	0	<input checked="" type="checkbox"/>

Figure 6- 13: Missing mail merge fields

- **If your pop-up blocker is on, it will prevent MS Word from launching when you click Generate letter now. To override the pop-up blocker, hold the Ctrl key down until you see MS Word launch and you see the letter appear.**
- **Should you see a numeric value under the column heading marked Missing merge field(s), it means a field(s) deemed required for the letter to be generated by a Super User is missing. To determine what the field is, click the numeric value under Missing merge field(s), then use the Add icon found under Edit/Add to insert the missing value.**
- **Your organization can elect to restrict access to offer letter attachments to only members of the Req team, meaning: they can see, attach, and send the offer letter as an attachment via e-mail to the candidate and subsequently view the offer letter on the candidate’s Talent Record. Non-req team members see the attachment as an inactive link.**


Print or save for batch processing

Select 'Generate letter now' to open the merged letter in Microsoft Word or 'Save for batch processing' to hold letters for batch print at a later date.

Generate letter now Save for batch processing

Figure 6- 14: Sending a letter

It is also possible to send a candidate’s Letter for batch processing, using the option **Save for batch processing** in step 8 on the previous page. With this option, there is usually someone identified in the organization who processes these letters on a regular basis.

- You could also choose to **Save for batch processing**. Typically, someone is identified within the organization to manage batch processing.
- Navigate to batched letters from the **Hiring Navigation icon** , click **Admin * Communications * Batch Letters**.

Document Template

Document Templates allow users to create a 'read only' pdf version of a document. Once the document is created it is stored in the candidate's Talent Record under the Attachments section. The document can then be attached to an e-mail communication and sent to the candidate, printed off, or posted to the candidate zone/portal.

Create a document for candidate

If your organization has implemented this feature, you can create documents for candidates directly from the Talent Record Actions menu for candidates who are filed to req folders.

1. From within a req folder, select the candidate from a list of candidates.
2. Click **Create Document** via the **Actions** menu. See Figure 6-15.
3. Select a document template from the list and click **Go**.
4. The Create document page displays.
5. Enter a unique name for the document in the **Document name field**. Your administrator may have included a pre-populated document name when creating the template so this step may not be necessary. This field is required.
6. Resolve discrepancies in the **Candidate and merge information** section, if any. See Figure 6-16.
7. Click **Preview** to see what your document will look like when printed. Click the X in the top right corner to close the preview window.
8. Click **Save as PDF** to create a PDF version of the document. See Figure 6-16.
9. Click **Close** to close the Create document confirmation message window.
10. Back on the candidate output grid, click the hyperlinked name of the candidate for whom you created the document to open the candidate's Talent Record.
11. Click the **Attachments tab** to see the document you created that is stored on the attachments grid.

From there you can:

- See information about the document.

- Click the document to view it.
- Select a category for the document.
- Delete the document.

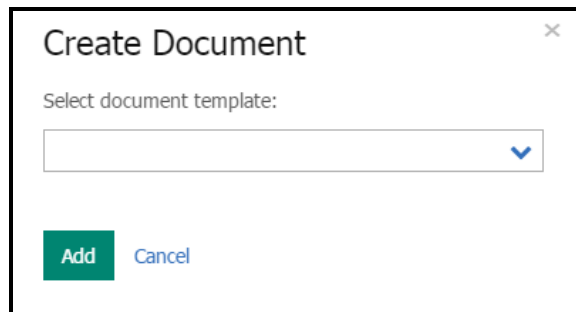


Figure 6- 15: Selecting a document template

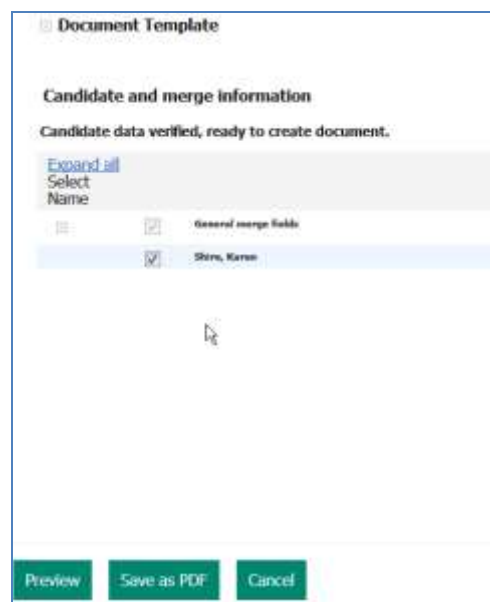


Figure 6- 16: Viewing Candidate Merge Information / Saving a document template as a PDF

Attaching the document to an E-mail Template

Once the document is created and saved it is stored as an attachment and available in the candidate's Talent Record. The document can be attached to an e-mail template and sent to the candidate.

Note: Since the document is a pdf read only file, the candidate is not able to edit the document.

To send an e-mail template with the document attached:

Follow steps 1-8 under the section **Sending an e-mail template**.

Candidate Zone/Portal

The candidate zone/portal provides a secure offer process and location where candidates can retrieve, review, and respond to offer documents. The following steps explain the process:

- When an offer letter is ready, the BrassRing user can post the document out to the Candidate Zone/Portal, and send the candidate an e-mail.
- The designated candidate who receives the e-mail (with an eLink to the secure Candidate Zone/Portal), can log into the Candidate Zone/Portal with the same login credentials (username and password) used to apply to the position. If the candidate did not create a profile or did not apply directly through the Talent Gateway, your organization may have elected to allow candidates to login with other criteria. For example, their email address may be their username and their zip code may be their password.
- The Candidate Zone/Portal stores a link to the PDF version of the Offer Letter and to the corresponding response form to record the acceptance or decline of the offer.
- The Candidate Zone/Portal can also be used to display candidate forms to the candidate for completion, and other attachments specific to your organization's hiring process.

Note: Your organization may use an Offer Form that is triggered when a specific HR status is assigned. This form could include fields used as merged fields on the Offer Document.

Posting an Offer Document

To create a document template (Offer), review the previous section entitled **Create a document for a candidate** for detailed instructions. Once the document template (Offer) is successfully saved, you can immediately post it to the Candidate Zone/Portal.

1. For the question **Want to post this Document and/or Item(s) to the Candidate Zone**, click the Go button. See Figure 6-17.
2. On the **Post to Candidate Zone** screen, select the checkbox for the document template (Offer) you created.
3. Optional – you can add a removal date when posting the document template to the Candidate Zone/Portal. You can also include additional attachments or candidate forms if necessary.
4. Click the **Post to Candidate Zone** button. See Figure 6-18.
5. An alert message appears that asks if you wish to continue. Click OK.
6. On the **Post to Candidate Zone** Confirmation page, please review the section for: Unsuccessful Candidate Zone/Portal Postings and TG Candidate Profile Errors. See Figure 6-19.
7. Optional – The Update HR status for successful candidate(s) link allows you to update the HR Status of the candidate.
8. Select a communications template to be sent to the candidate, and click Go.
9. The communication template appears for your review. Make any necessary changes.

- 10. Click Send.
- 11. On the send confirmation page, click OK.

The candidate will now receive a notification that the offer was posted on the candidate zone/portal for review and either accept or decline.

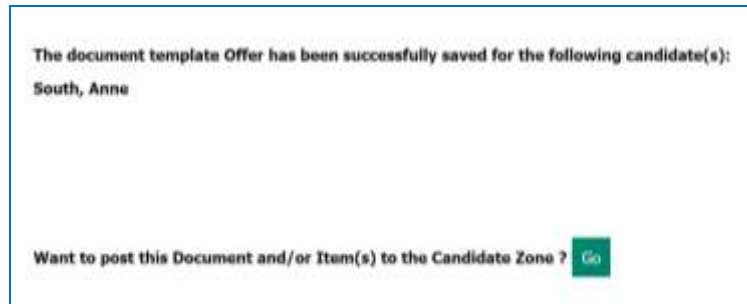


Figure 6- 17: Post this Document and/or Item(s) to Candidate Zone

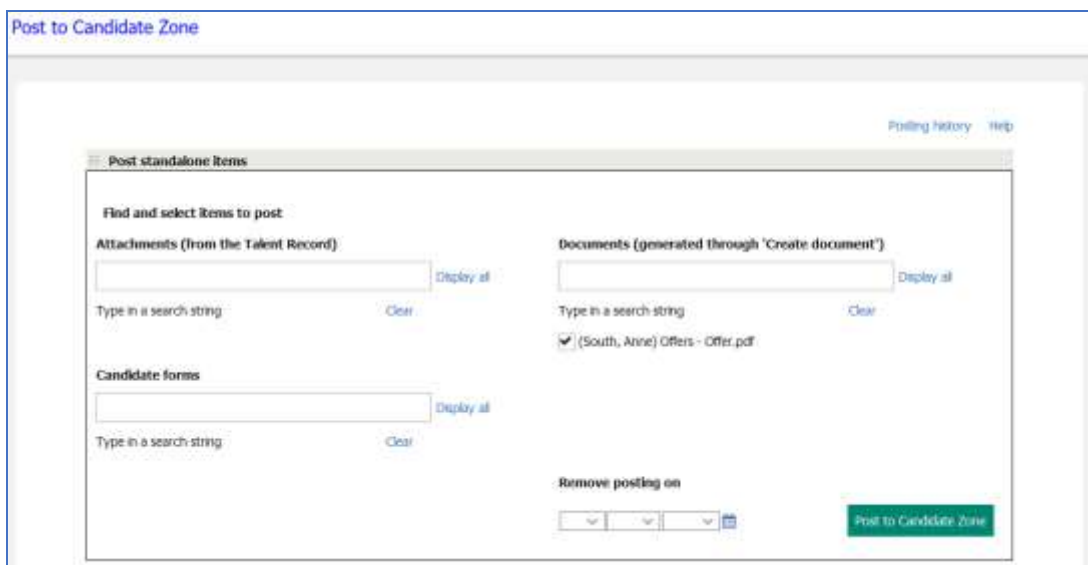


Figure 6- 18: Select items to post



Figure 6- 19: Post to Candidate Zone Confirmation

Posting an Offer Document Packet

The following steps allow you to post the offer document packet to the Candidate Zone/Portal:

1. Select the checkbox for the candidate who should receive the Offer document
2. Click **Send Communication** in the Actions menu.
3. Select the **Offer document** from the **Document Packet Template** and click **Go**.
4. Add the name of the document in the **Subject** field. Your administrator may have included a pre-populated subject when creating the template so this step may not be necessary.
5. Make any changes necessary to the **Instructions text**.
6. From the **Upload attachments from Talent Record** window, select the Offer Document and click the **Add** button to move the document to the **Selected documents** window.
See Figure 6-20.
7. Click the **Post to Candidate Zone** button. See Figure 6-21.
8. Once you click the **Post to Candidate Zone** button, the offer document (which is a PDF file) is posted to the Candidate Zone/Portal and available to the candidate.
Note: The Offer document is also available on the Action Log of the Candidate Talent Record.
9. If applicable, a screen will appear allowing you to send a communication template to the candidate. Select the appropriate communication template to send the candidate.
See Figure 6-22.

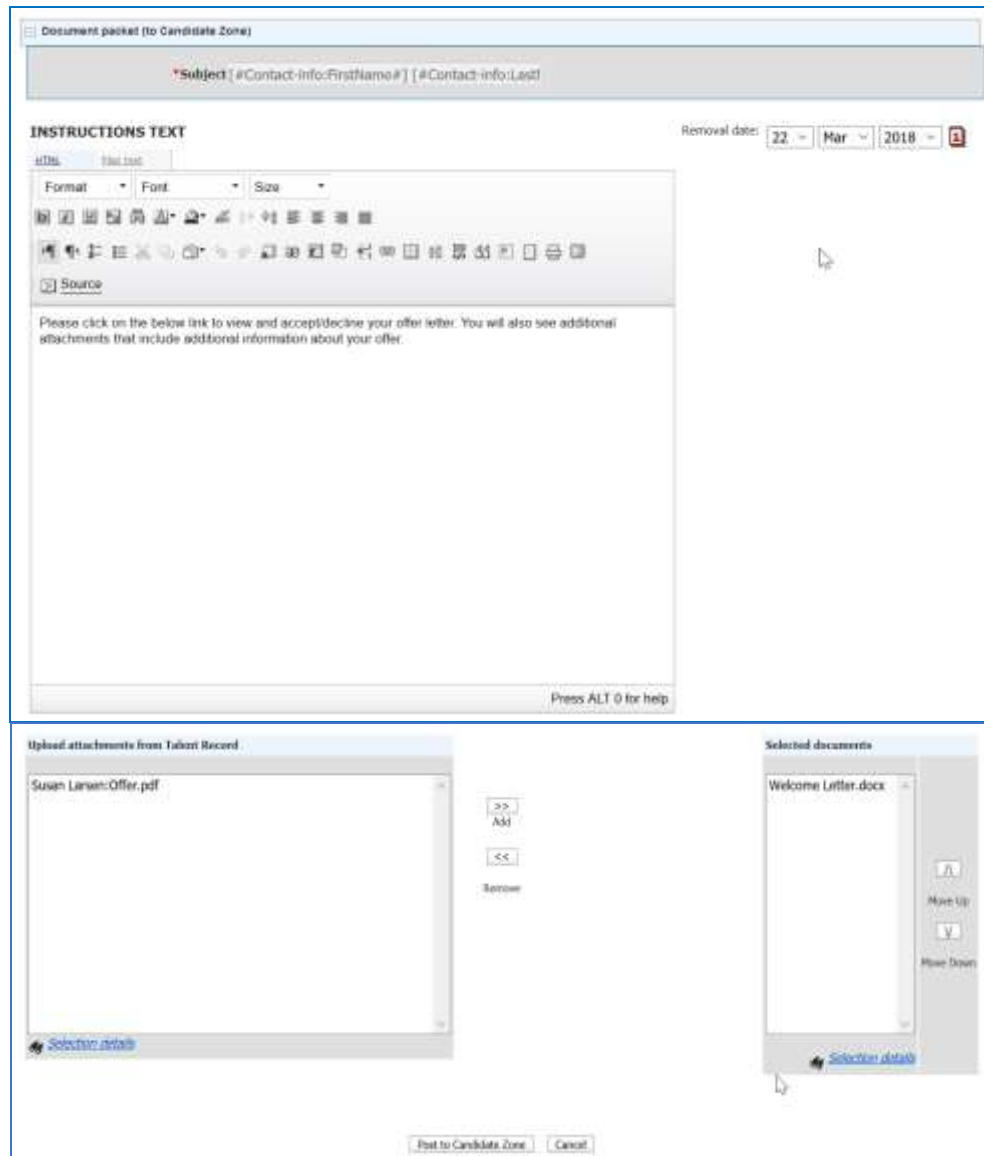


Figure 6- 20: Offer Document from the Document Packet Template

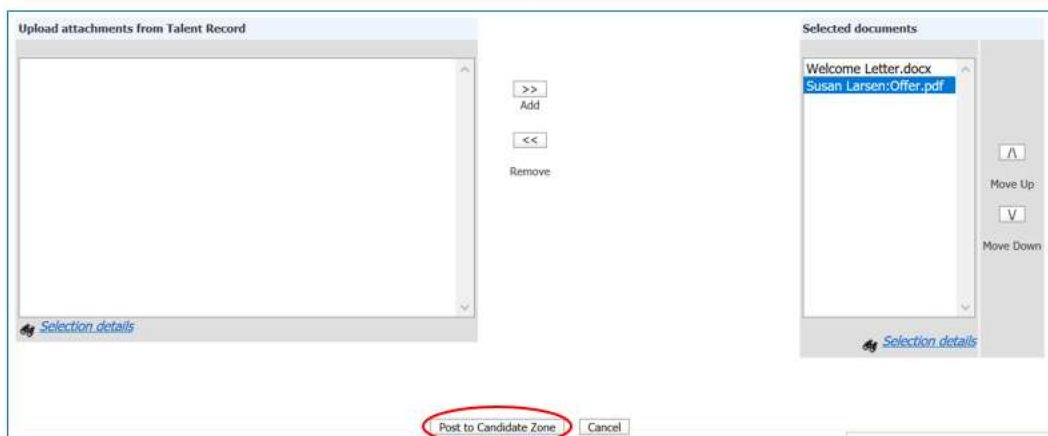


Figure 6- 21: Post the Document to the Candidate Zone



Figure 6- 22: Select Communication Template

Send the Communication to the Candidate

When you are ready to send the Offer e-mail, navigate to the Req folder and select the candidate(s) to whom you are extending the offer and click the **Send Communication** in the Actions menu.

1. Select the e-mail template to be used for the e-mail communication that lets the candidate(s) know about the extended offer and where to access it.
Note: You may want to add the **Candidate Zone** merge token which allows the candidate to click a link on the e-mail to access the offer in the candidate portal of the Talent Gateway.
2. Once the candidate receives the e-mail, he/she can either click on the link or log-into his/her profile on the Talent Gateway to view and accept or decline the offer. See Figures 6-23 and 6-24.

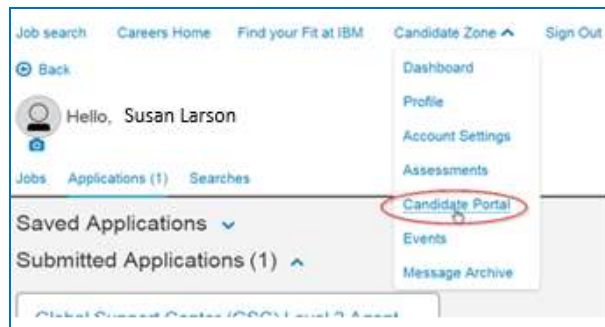


Figure 6- 23: Access the Candidate Portal from the Talent Gateway

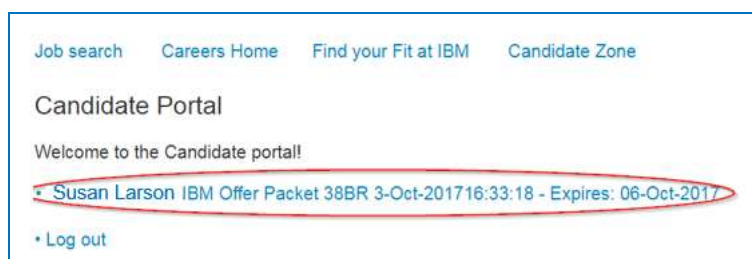


Figure 6- 24: View the Offer to either accept or decline

Chapter Summary

- *BrassRing* forms are used to capture and store all types of information.
- Depending on your user type, you may or may not be able to add, view, edit and/or delete forms.
- eLinks allow you to send resumes/CVs and forms to hiring managers via e-mail.
- The sender of an eLink will receive a confirmation e-mail as well as an e-mail with the recipient's response, if the recipient responds.
- When an eLink is responded to, the sender receives the information via their e-mail.
- It is possible to eLink a blank form by itself, without the resume/CV.
- E-mail templates can be sent to multiple candidates at the same time; the e-mail is sent to the candidate as an individual e-mail.
- The history of Communications sent to candidates is readily accessible by accessing the candidate's Talent Record.

Check Your Skills

Answer these True or False Questions:

1. You can send a form via eLink without the resume/CV.
2. A form can automatically pop up when an associated HR status is assigned.
3. You can tell if a hiring manager has opened an eLink.
4. You can only eLink one resume/CV at a time.

Answer the following short answer questions:

5. What information is automatically added to eLink History when sending eLinks? Hint: It is located in the candidate's Talent Record.

Complete the following hands-on exercises:

6. Add a form to a candidate in one of your folders.
7. Send an eLink to your own e-mail address.
8. Check the eLink history for the candidate you eLinked to confirm the e-mail address.
9. File two candidates in a working folder to one of your req folders.

Chapter 7: Closing the Hiring Cycle

Chapter Overview:

To help streamline your workflow, *BrassRing* can automatically close a req for you and prompt you to complete the applicant tracking for the candidates within the req folder.

There may also be forms for you to complete, such as a disposition form, or other final steps determined by your company's specific hiring process.

In this chapter we will review the steps to close the hiring cycle by updating candidates' HR statuses and closing the req.

Objectives:

At the end of this chapter you will be able to:

- Take candidates through the hiring cycle.
- Close a req.

Continuing the Hiring Cycle

Companies create HR statuses to indicate where a candidate is in the hiring process. Best practice is to update the HR status for each candidate in a req folder to a final disposition. Basically, this means that you either hired the candidate for the req, or you are no longer interested in the candidate. The HR status should reflect this.

Examples of continuing/intermediate HR statuses include:

- 1st interview
- 2nd interview
- Offer extended
- Background check

Final Disposition

Updating the statuses of your candidates is important for two reasons. By keeping your candidates' HR statuses up-to-date, others can easily access this information and decide whether to pursue a candidate you are no longer considering. Also, many of the *BrassRing* reports your organization may run are based on HR status. Keeping this information current is a key to maximizing the usefulness and validity of these reports. Statuses are also used to determine which HR Status Category is shown to a candidate when they are reviewing their job submissions on the Responsive Talent Gateways. Keeping the statuses up to date will ensure your candidates are informed of where they are in the hiring cycle.

Typical examples of final dispositions companies use include:

- Not Interested – Candidate
- Not Interested – (Company Name)
- Offer Declined
- Offer Accepted
- Hired

Most companies opt to have the Candidate type for a hired candidate automatically change from External to Internal. Once you have extended an offer, and it is accepted by the candidate you are hiring, you should assign a final HR Status to the candidate and close the req.

📌 **To ensure accurate reporting, be sure to update all candidates in req folders to a final status.**

📌 ***BrassRing* shows the most recent date Hired was assigned for employee referral candidates who originally worked for your company, left your company, and were rehired.**

Closing a Req

In *BrassRing*, there are two ways to close a req: automatically with Auto-close, or manually by the user.

Auto-Close

Your company may have decided to have *BrassRing* help streamline the updating of candidates' final dispositions and the closing of reqs by using Auto-close. Once all positions have been filled for a req, *BrassRing* will automatically close the req for you.

However, if all candidates in the req folder are not at a final status, *BrassRing* prompts you to first disposition those candidates prior to closing the req.

Keep in mind the following when using Auto-close:


- Your organization may be using more than one final status to trigger BrassRing to Auto-close a req.
- When updating remaining candidates to their final statuses, a Disposition form will likely appear. Completing it will attach the same form (and the reason for not hiring) to each of the remaining candidates in the req folder. Yet, the reasons for not hiring specific candidates might be different for each.
- To fill out Disposition forms independently for each candidate, either add any necessary forms to candidate Talent Records before beginning the Auto-close process, or use the checkboxes to deselect those candidates for whom the HR status and the reason does not apply.
- Auto-close will refresh the page allowing you to update the remaining candidates to a different HR status and add a Disposition form with different reasons for not hiring them. Repeat this process until all candidates are at a final disposition status and have their disposition form associated with them.
- *BrassRing* prompts you to take each candidate to a final status, skipping any intermediate HR statuses and forms within the hiring process, which may impact reporting.
- If choosing to stop Auto-close in order to first complete forms, you will need to update all other statuses, and close the req manually.
- Once a req is closed, HR status cannot be changed for the candidates in that req folder. To update or change candidate status, you will need to re-open the req. This can be done by re-opening the req from your list of closed reqs.
- When a req is closed, it will automatically be removed from any Talent Gateways.

Typically, only Super Users can remove candidates from Req folders.

Closing a Req Yourself

If your company is not using Auto-close, or you need to close a req separately from Auto-close, you can close reqs yourself provided you are designated as req creator, Recruiter, or Req team member.

To close a req yourself:

1. From Hiring Navigation icon , click **Reqs * View My reqs * Open**.
2. Select the req to close.
3. Click **Close** from the Actions list. A new window appears. See Figure 7-1. If you click Yes, BrassRing removes the Talent Gateway postings.

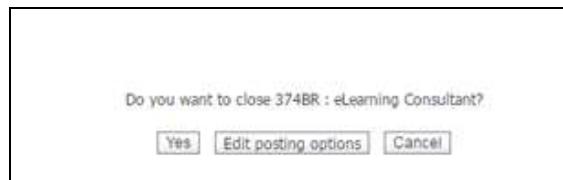


Figure 7- 1: Closing a req

Canceling a Req

Instead of closing a req, it may be more appropriate to cancel a req. For example, if your organization has a change of headcount or the budget for the position is withheld. Canceling a req is a more accurate option in such cases.

To Cancel a Req

1. Select the req to cancel.
2. Click **Cancel** from the Actions list. A new window appears. See Figure 7-2. If you click Yes, BrassRing removes the Talent Gateway postings.

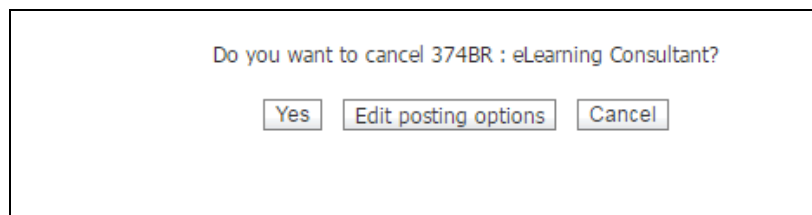


Figure 7- 2: Canceling a req

Chapter Summary

- A req can be closed automatically by *BrassRing* using Auto-close, or manually by the user.
- Best practice is to update all candidates in a req folder to a final status and complete the disposition form.
- Your company may have opted to have a candidate's Candidate type update to Internal when the candidate is hired.
- Auto-close prompts you to update the HR statuses of all your candidates and then closes the req for you. This removes the postings from your Talent Gateways.

Check Your Skills

Answer these True or False Questions:

1. Updating all candidates to a final status helps you build accurate reports.
2. It is best to wait until after the req is closed to complete forms for candidates.
3. Once a req is closed, it can never be re-opened.

Perform the following hands-on exercises:

4. Move one of your candidates through your HR cycle to a status of No Interest. You can cancel out of any forms that may pop-up
5. Next, move another candidate through your HR cycle to a hired status. You can cancel out of any forms that may pop-up. If using Auto-close, walk through the process of closing the req.
6. Undo the final status for the person you Hired as if that person did not actually show up for the first day of work.
7. Close a req manually.

Chapter 8: Getting Organized

Chapter Overview:

Folders in *BrassRing* are similar to the folders in your desk drawer or the electronic folders in your e-mail program. Earlier, we learned that there are permanent **req folders** for each job req, allowing you to track candidates through your applicant flow.

You can add a second type of folder, known as **working folders**, to help organize potential candidates and build talent pipelines when you are sourcing.

Unlike other folders you might use today, *BrassRing* folders can easily be shared in order to streamline communications and tracking within your organization.

In this chapter, we will focus on organizing your candidates through the use of folders in *BrassRing*.

Objectives:

At the end of this chapter you will be able to:

- Identify the three different folder types.
- Navigate to your open req folders.
- Add a working folder.
- Inactivate a working folder.
- Edit a working folder.
- Delete a working folder.

Overview of Folders

Have you ever considered that your ideal candidate may have applied to another position at your company, and his/her information is resting in a folder on someone else's desk?

BrassRing provides you access to your company's entire candidate pool, using Search, found in the Candidates menu. The folders in *BrassRing* allow you to set aside a copy of those candidates sourced from the pool that you want to track and organize for your positions.

Benefits of Organizing with Folders

- Req folders provide a permanent place to track candidates for compliance and reporting purposes. Req folders cannot be deleted.
- Working folders are commonly used to build talent pools. They allow you to track past, current and potential candidates. They can be deleted, though any resumes within them remain in BrassRing, and your organization's candidate pool.
- Team membership with working folders allows you to collaborate on your recruiting efforts across distances and teams within your organization without having to e-mail or print resumes/CVs in order to share them.

Understanding Folder Types

There are three types of folders in *BrassRing*:

- Req folders
- Inbox folder
- Working folders

Req Folders


A req folder is automatically created by *BrassRing* for each req once it hits the Open req stage. You never have to manually add a req folder.

There are a few things that you should know about req folders:

- The req folder includes the name and position title of the req form.
- Candidates may appear in multiple req folders, as they may have applied to multiple positions.

- The tracking of candidates' HR status through your company's applicant flow is performed from within req folders.
- Most companies have defined business rules that state when candidates must be tracked to the req folder.
- Candidates within a req folder are typically not removed from them, though they might be copied to another folder.
- Typically, only your Super Users can remove candidates from req folders.
- When a req is closed, the folder can be viewed from the Reqs menu.

To access your open req folders:

1. From the Hiring Navigation icon , click **Reqs * View My Reqs * Open**. See Figure 8-1.
2. The list of open reqs of which you are a member displays.
3. Under the Total column click the hyperlinked number to view the folder contents. The New column indicates any new candidates you have not yet screened.



Auto req ID	Title	Positions Remaining	Total	New	0-Filed
37188	CAP-Administrator	1	N/A	N/A	0
36988	eLearning Consultant	1	N/A	N/A	0
36888	Director	1	N/A	N/A	0
36788	Administrator level 3	1	6	4	5
36688	Admin Assistant I	1	6	6	5

Figure 8- 1: My open reqs

Inbox Folder

BrassRing users can add working folders whenever they like, as a result, the Inbox is used infrequently. It provides you with a place to file a resume/CV if you have not created a working folder already and simply wish to set the resume/CV aside.

The Inbox can also be used to route resumes/CVs to other *BrassRing* users without having to e-mail or print them for those recipients.

Working Folders

You add, inactivate, and delete your working folders as needed to organize candidates (build talent pipelines). You can create a working folder to share with others, or for your own personal use.


There are a few things that you should know about working folders:

- The tracking of candidates' HR status through your company's applicant flow is performed only from within req folders, not working folders. However it is possible to update a candidate's HR status through a working folder, it is not recommended.
- Once a candidate is filed to a working folder and their status is updated, the candidate cannot be removed without the candidate being moved to a disposition status. (Error that will display: Unable to remove candidate(s). Candidates with an HR status must be dispositioned to a final status before they can be removed.)
- Only the owner of a working folder can edit, inactivate, or delete it.
- Your list of working folders will display the folder owner's name and the number of candidates within the folder.
- You can add team members to, or remove them from, a working folder you own.
- You can manually file or move a maximum of 100 candidates to a working folder at one time from candidate search results.

Apply Your Knowledge

When might you move candidates from working folders to req folders?

To access your working folders:

1. From the Hiring Navigation icon , click Candidates * My folders * Working. See Figure 8-2.
2. The list of the working folders that you have created and of which you are a team member will display. See Figure 8-3.
3. Click the hyperlinked number under **Total Candidates** to view the folders contents.

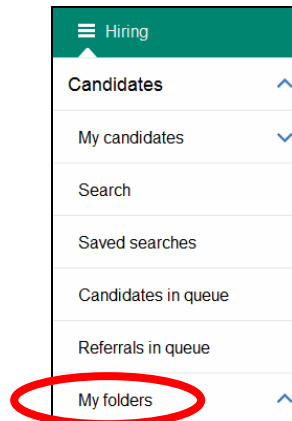


Figure 8- 2: Accessing folders

Working Folders

Showing 1 of 1

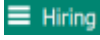
Actions:

<input type="checkbox"/>	Folder Name	Folder Owner	Folder Type	Total Candidates	Date Created
<input type="checkbox"/>	Potential Future HR Analyst	Jones, Mary	Team	0	08-Dec-2017

Figure 8- 3: Working folders

Adding Working Folders

To add a working folder:

1. From the Hiring Navigation icon , click Candidates * My folders * Add new.
2. Enter the folder name. If the folder will only be used by you, proceed to step 5.
3. From the User(s) with access drop-down window, select the appropriate user(s). You will see their names appear as selected users with a check mark.
4. Click Submit to save the additional team members.

Add Folder

Fields marked in asterisk (*) are required

Folder Name *

User(s) with access

Jones, Mary


Figure 8- 4: Add a working folder

- **Folders will be visible to all team members. Be sure to name folders in a manner that everyone will understand.**
- 🌐 **The option at the bottom of the List window lets you order the list either by first name or last name.**
- 🌐 **If you created a working folder, you are able to add or remove team members. If you are assigned as a member of a folder someone else created, you can remove yourself from that team.**

Editing Working Folders

You might edit a working folder's name or add/remove team members.

To edit a working folder:

1. From the Hiring Navigation icon , click **Candidates * My folders * Working**.
2. Select the Working Folder you would like to edit.
3. Click on the **Actions** menu. See Figure 8-5.
4. Select **Edit**.
5. Click **Save > OK**.

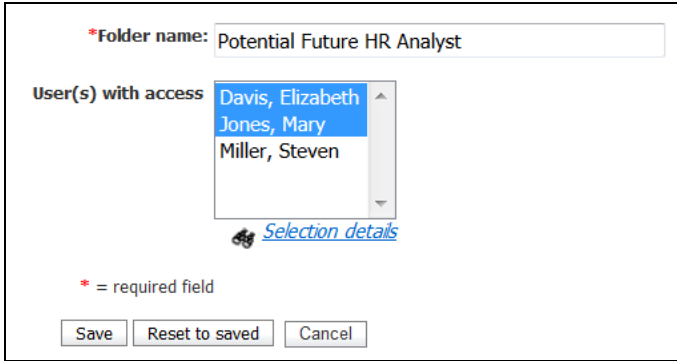



Figure 8- 5: Editing a working folder

Inactivating Folders

Inactivate a working folder to remove it from your active folders list. To inactivate a folder:

1. From the Hiring Navigation icon , click **Candidates * My folders * Working**.
2. Select the folder(s) to inactivate.

3. Click on the **Actions** menu.
4. Click **Deactivate**, click OK.

Consider inactivating a folder when a req is filled yet the folder contains qualified candidates you might want to retrieve at a later time.

To access an inactive folder: From the **Hiring menu**, click **Candidates * My folders * Inactive**. Your inactive working folders will display.

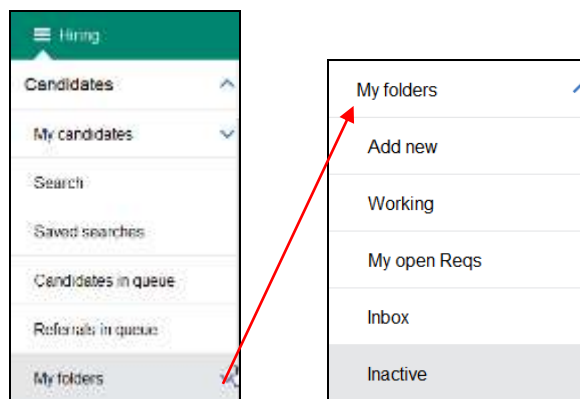



Figure 8- 6: Accessing an inactive folder

Inactivating Folders

You can also choose to delete working folders that you created, though this does not delete the resumes/CVs within it.

Deleting the working folder is only possible if: all candidates in the folder have an HR status of 0-Filed or (if your company allows the tracking of HR statuses within a working folder) the resumes/CVs been assigned a final candidate status such as (company name) not interested.

To delete a working folder:

1. From the Hiring Navigation icon , select **Candidates * My folders * Working**.
2. Click the **Actions** menu. The **Folder delete** screen displays a message informing you of any implications of deleting this folder. Refer to Figure 8-7.
3. Click **OK**.

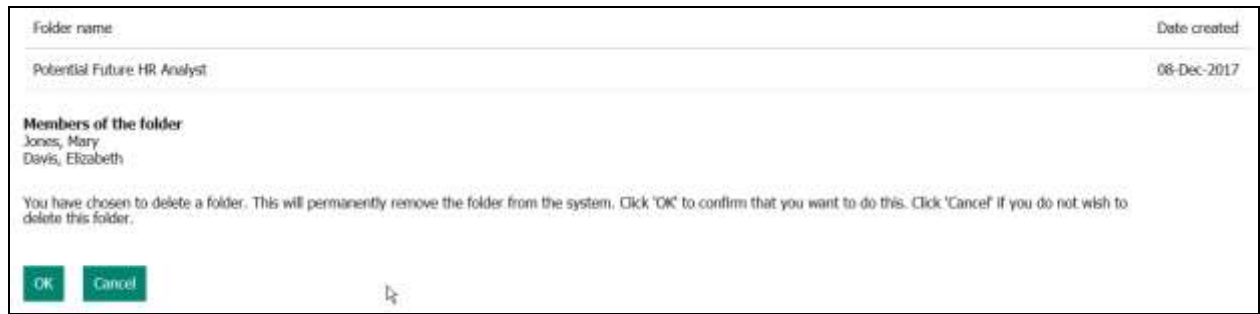


Figure 8- 7: Folder delete screen

Chapter Summary

- Req folders are created automatically for each req when that req's lifecycle status is Open.
- In Candidates>Folders>My open reqs, you will see all the open reqs to which you have access.
- Working folders can be added to develop talent pools.
- Candidates can be filed to multiple req folders as they may have applied for and thus be considered for multiple positions.
- A working folder's owner can edit the name and team members for that working folder.
- The owner of a working folder can delete it if all candidates are assigned a 0-Filed status or (if your company allows applicant tracking in a working folder) a final HR status, such as (Company name) not interested.
- Moving a candidate to a folder does not prevent that candidate from being visible to other individuals or being returned in a search.

Check Your Skills

Answer these True or False Questions:

1. You have to add your own req folders.
2. Candidates can reside in two folders at the same time.
3. If a req is deleted, you can no longer access the req folder.

Select the best answer(s):

4. Only the owner of the working folder can:
 - a. Edit the folder
 - b. Inactivate the folder
 - c. Delete the folder
 - d. All of the above
 - e. None of the above
5. My open reqs...
 - a. Is a folder that can be deleted.
 - b. Provides access to all reqs in BrassRing.
 - c. Provides access to each of your open reqs.
 - d. All of the above.

Perform these hands-on exercises in BrassRing:

6. Add a working folder and title it Sales Prospects.
7. Edit the folder and add the person sitting next to you as a member of the team. Remember to pick his/her training user name.
8. Inactivate the working folder you created in #6. Then reactivate the folder.

Chapter 9: Searching for Candidates

Chapter Overview:

We have learned about the different types of folders available within BrassRing. We now have a better understanding of the value of Working Folders and with our req posted on the Talent Gateways (this was covered in Chapter 3), we are now more organized.

Candidates who apply to a req and are automatically filed to a req folder can be included in searches in *BrassRing* to identify candidates with the right skills and experience for future jobs, thus allowing for the development of talent pools/pipelines. These resumes can be filed to working folders for future reference.

In this chapter, we will learn about searching your *BrassRing* candidate pool.

Objectives:

At the end of this chapter you will be able to:

- Search for candidates with specific qualifications.
- Use Boolean searching.
- Edit your search page.

Quick Search

The Quick Search functionality within *BrassRing*, allows you to search for reqs based on: job title, a portion of the job title, req number, a portion of the req number, or access a candidate record associated with a specific requisition.

Quick Search is located on the top-right side of the Home Page of BrassRing and other internal pages.

From the Quick Search feature, select what you would like to search for: Candidates, Reqs or Candidates in Req. Type in the Candidate's name, Req ID or Job Title based on what you have selected for your search criteria.

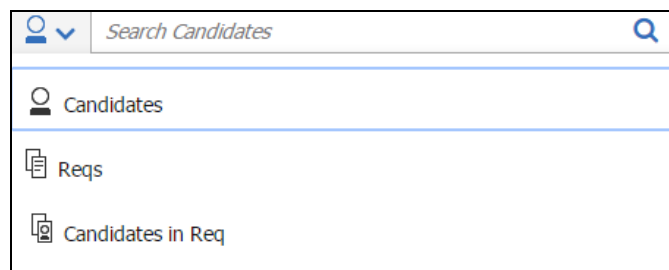


Figure 9- 1: Quick Search

- **Candidate Quick Search: You may use the Boolean search terms AND, OR, and NOT when conducting a candidate quick search.**
- **The Boolean search term of AND will be used by default between terms entered into this field if no Boolean search term is used.**
- **The use of double quotations (“”) is acceptable in this quick search field. Double quotations should be used when users are looking for an exact phrase within a candidate’s resume.**

When the result is returned (see Figure 9-2), you will be able to take certain actions on this candidate such as create candidate forms or add notes.

Name	Notes	Forms	Agency referral	Candidate type	Employer	Position held	Location	Date last loaded	Codes
Smith, Jeff				External	WANG	SENIOR SOFTWARE...	HA	29-Aug-2016	00123.367BRADK

Figure 9- 2: Quick Search Results

In Name Search

When using Quick Search, you have the option to exclusively search by candidate name. Instead of running a search on all candidates with a certain name in their resume (In Resume option), it allows the user to perform a partial or full name search. Entering a name in the quick search field and selecting the Enter key on your keyboard will now default to the In Name option. See Figure 9-3.

Name	Viewed	Notes	Forms	Agency ref...	Candidate...	HR status ...	HR status ...	Updated by	Folder	Employer	Position h...	Location
Byers, Kobe					Internal					RAYTHEON	SOFTWARE ENGINEER	MA
Donner, Ilver					Internal					SANDHILLS PUBLISHING	CONTENT EDITOR	NE

Figure 9- 3: In Name Quick Search

- The In Name Quick Search does not support Boolean searches.**
- It also does not display the OFCCP requirements, if enabled.**

Overview of Candidate Search Screen

From the **Candidates > Search** page, you can choose the candidate pool you wish to target, build searches to mine those targeted candidate pools, and perform saved searches. See figure 9-4.

Elements of Search

Here is a summary of the search capabilities of *BrassRing*:

- **Candidate pool:** When conducting a search in BrassRing, you are searching through resumes/CVs that were sent to your company. When candidates submitted their resumes/CVs through your Talent Gateways, a copy is filed to the req folder, and a copy is placed in the candidate pool.
- **Search fields:** These allow you to select specific criteria to use, narrowing or broadening your search results.

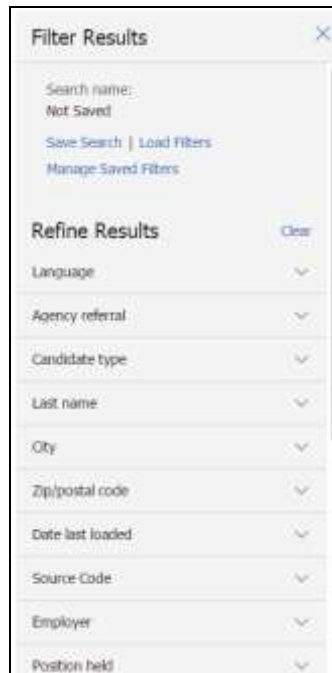


Figure 9- 4: Search page

Elements of Search Fields

Do the searchable fields in Figure 9-4 look familiar? These are some of the fields that we discussed in *Chapter 4: Resume/CV Routing and Processing*. Recall that the benefit of having information fielded from each resume/CV is that you can search for matches to that piece of information. For instance, enter **Director** in the Positions held field and you will find candidates listing Director as one of the job titles on their resume/CV.

Here is some additional information to keep in mind when searching:

- Searching in BrassRing is neither case-sensitive nor accent-sensitive.
- You can search on fielded information, active or inactive codes, and form fields designated by your company as searchable.
- A candidate's resume/CV can be searched for specific terms by entering that term into the Quick field followed by *in Resume*. Example: If you are searching for candidates with experience in analytics, enter in the Quick Search field: *analytics*. The word string '*in Resume*' automatically appears next to '*analytics*'.

Running a Search

When running a search, you can search by Candidate types. Candidate types allow you to further filter your searches for targeting specific candidate populations.

Candidate Types

Candidate types provide you with the ability to associate candidates with their appropriate population (e.g. employees versus non-employees). The use of Candidate types also helps manage your company's employees' base of skills, enabling quick identification and redeployment of internal talent.

In *BrassRing*, candidates are categorized into one of four standard candidate types:

- External
- Internal
- Former employee
- Inactive
- Agency (if enabled)

The candidate type is determined by the Talent Gateway the resume/CV is entered into *BrassRing*. Non-employees are External candidates. Employees are Internal candidates. Automation triggers can also be used to automatically assign the correct candidate type based on specific conditions.

Your user type determines which candidate type(s) you are able to search. Here is a preview of the Candidate types as they are displayed in Search:

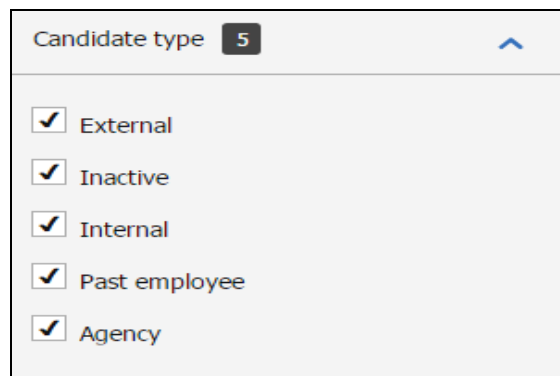


Figure 9- 5: Selecting Candidate types

- **Depending on your user type, it may be possible to update a candidate type manually within *BrassRing*.**
- **Your company may have opted for additional customized candidate types, for example Referral.**

Initiating a Search

As you define your search criteria, BrassRing updates the search results with information entered. Shown in Figure 9-6.

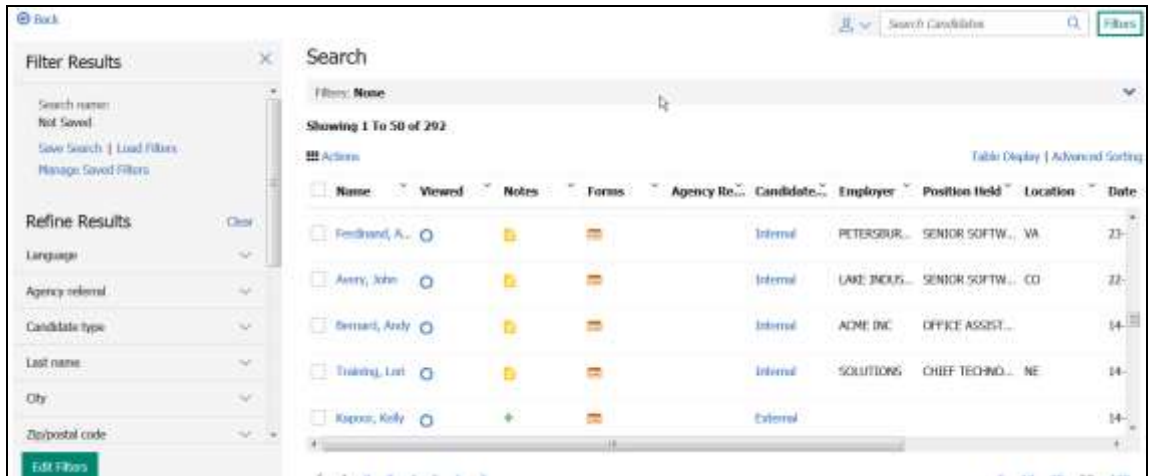


Figure 9- 6: Running a search

The Refine Results section on the left of your Search screen already provides you results for those Search fields with options. Example: When you click on the drop-down window for Candidate Type, the list of options shows the number of candidates who have been assigned to the different candidate types in brackets (see Figure 9-7).

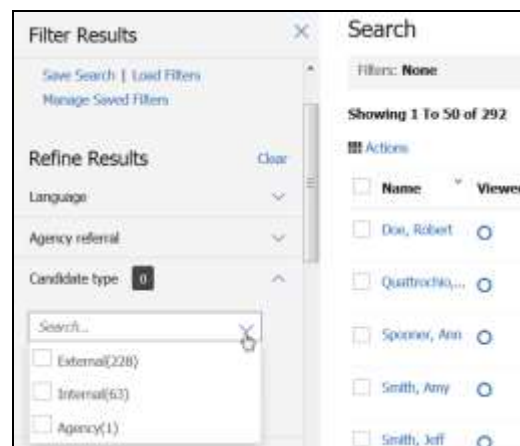


Figure 9- 7: Refine Results

- 🌐 **The filters section displayed on the left allows for continuous access to the search criteria by using the Edit Filter button.**
- 🌐 **Filters can display up to 25 options. If the number of options are more than 25, the following message is displayed: Showing first 25 options. Enter more characters to filter further.**
- 🌐 **Some filters allow you to search with the terms: contains, ends with, or starts with to narrow down the search results. Example: Employer.**

The filters added to a Search will appear above the search results output grid. Refer to Figure 9-8. You can remove filters individually by clicking on the **X** next to the filter name or clear all filters by clicking on **Clear Current Filter**.

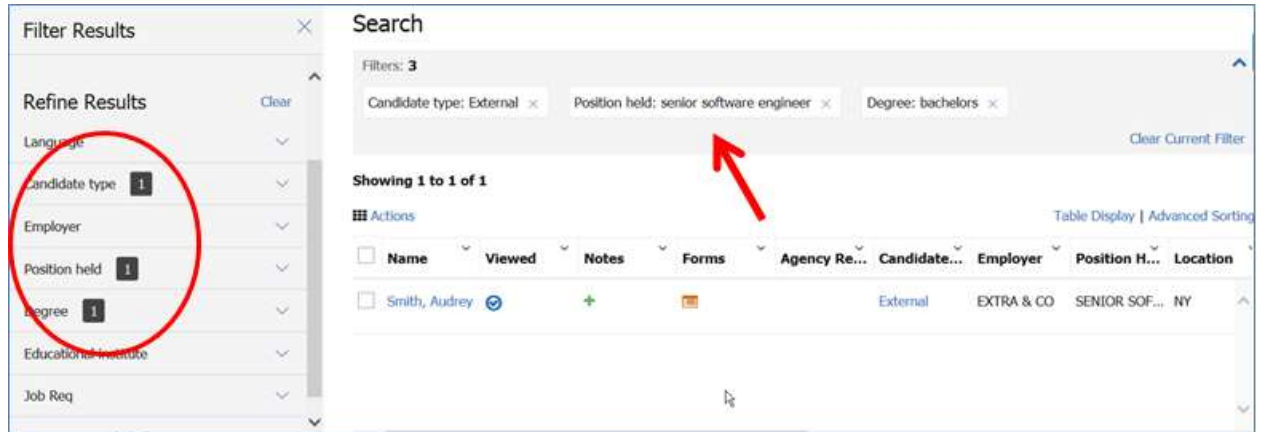



Figure 9- 8: Current Filters

Saving a Search

Searches you frequently perform can be saved which allows you to save the search criteria and run the saved search at a later time.

To save a search:

1. From the Hiring Navigation icon , select **Candidates > Search**.
2. Add your search criteria.
3. Click the **Saved Search** button. Enter the name of the Search in the **Saved Search window**. Refer to Figure 9-9 and 9-10.
4. Click the **Submit** button.

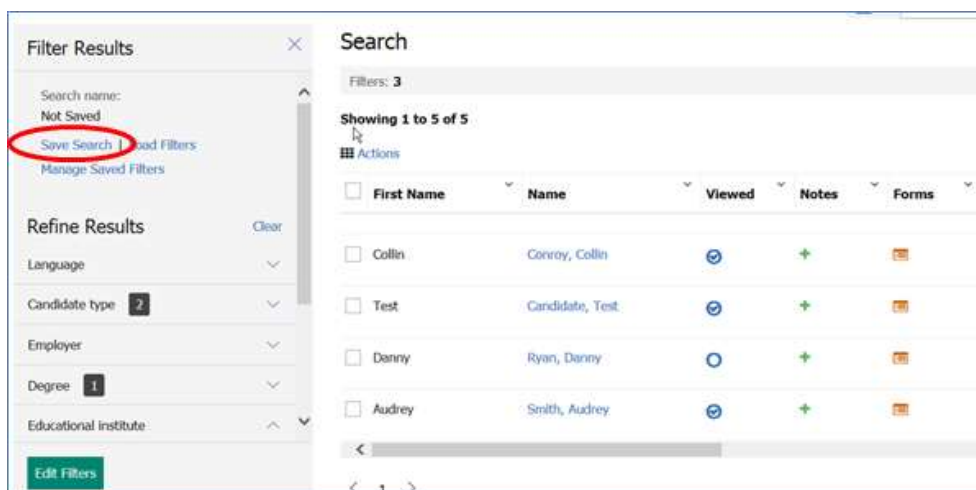


Figure 9- 9: Save Search

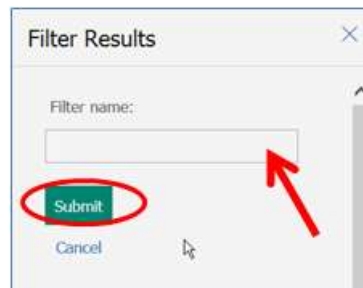





Figure 9- 10: Enter Saved Search Name

Manage Saved Filters

Searches you frequently perform can be saved which allows you to save the search criteria and run the After you saved a search/filter, **Managed Saved Filters** allows you to rename or delete the Saved Filter(s).

To access **Managed Saved Filters**:

1. From the Hiring Navigation icon , select **Candidates > Search**.
2. Click **Managed Saved Filters** from the Filter Results section.
3. The **Manage Saved Filters** screen lists all saved searches/filters. Refer to Figure 9-11.
 - a. Click the edit icon  to Rename the filter/saved search.
 - b. Click the delete icon  to Delete the filter/saved search.
4. Click **Done**.

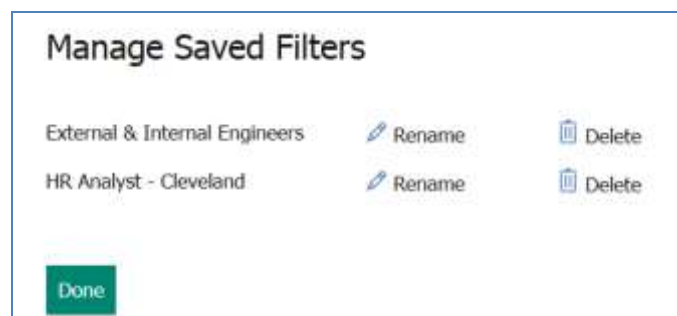



Figure 9- 11: Manage Saved Filters

Edit Filters (Edit Saved Search)

Searches you saved can be edited by adding filters, removing filters, and/or selecting different filter values.

To edit filters:

1. From the Hiring Navigation icon , select **Candidates > Search**.
2. Select **Load Filters**. The **Load Filters** screen appears which provides you with a list of all searches you saved.
3. Click the radio button for the saved search to edit. Refer to Figure 9-12.
4. Click the **Done** button.
5. Once all changes to the filters are made, click the **Saved Search**, and add a name for the new Saved Search.
6. Click the **Submit** button.

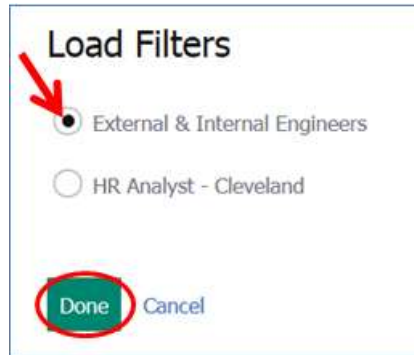


Figure 9- 12: Load Filters: Select Saved Search

Boolean Searching

BrassRing supports searching using Boolean terms to create strings of words and phrases. In *BrassRing*, there are three basic Boolean terms: **AND**, **OR**, and **NOT** (**and NOT** is also accepted). Each one has a slightly different role in searching, described below. They are case-sensitive and must be capitalized in a Boolean search. Boolean searches can only be used with Quick Searches.

Using AND

Using **AND** narrows the number of search results you will see. For example, adding to the Quick Search field **UNIX AND NT in Resume** (where *in Resume* automatically appears) will include in the search results only resumes/CVs that contain both the words UNIX and NT. If the resume/CV contains only the word 'UNIX', it will not be considered a match (likewise, if it contains only the word 'NT'). The resume/CV has to contain both words to be included in the search results. Refer to Figure 9-13. AND is the default Boolean operator when using the quick search field.

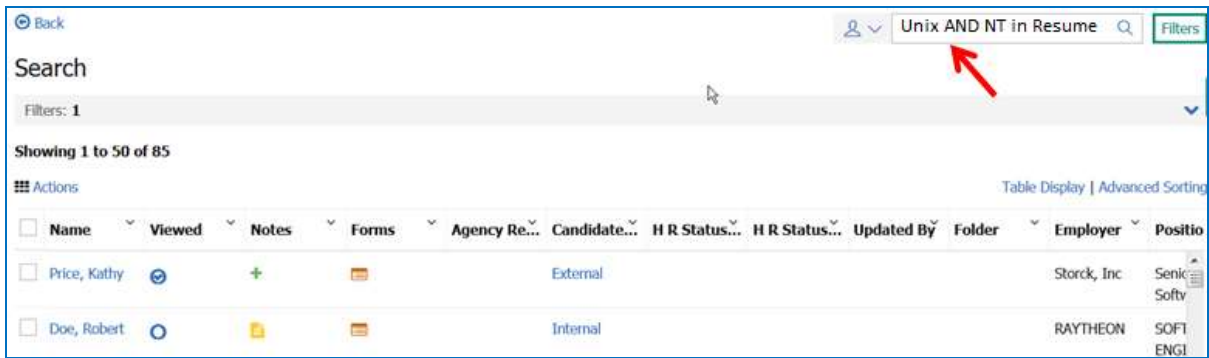


Figure 9- 13: Search Using Boolean Search Term: AND

Using OR

Whereas AND narrows a search, **OR** broadens it by returning resumes/CVs that have **either** word you specify. For instance, a Quick Search for **UNIX OR NT in Resume** will return all the resumes/CVs that contain either the word 'UNIX' or those that contain the word 'NT'. Refer to Figure 9-14.

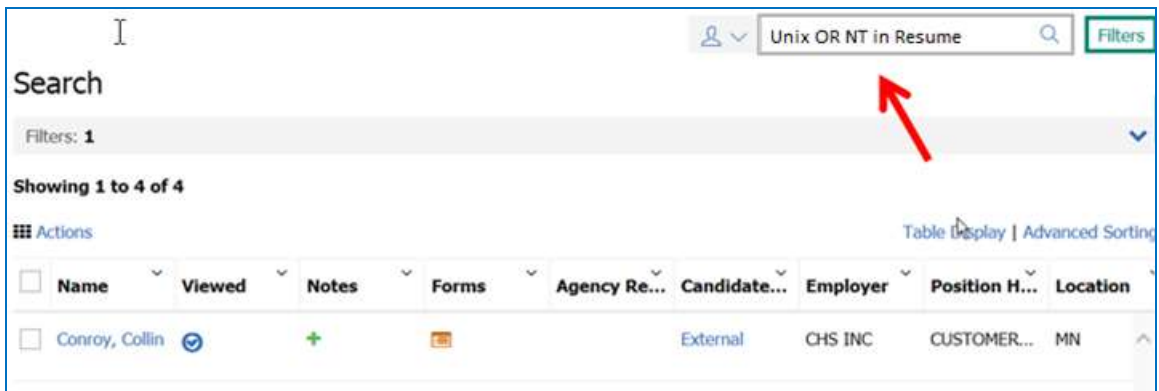


Figure 9- 14: Search Using Boolean Search Term: OR

Using NOT

The third Boolean term is NOT, and it allows you to exclude resumes/CVs with certain words from your Quick Search. Specifying **UNIX NOT NT** would return all resumes/CVs that contain the word 'UNIX' - except those that also contain the word 'NT' Refer to Figure 9-15.

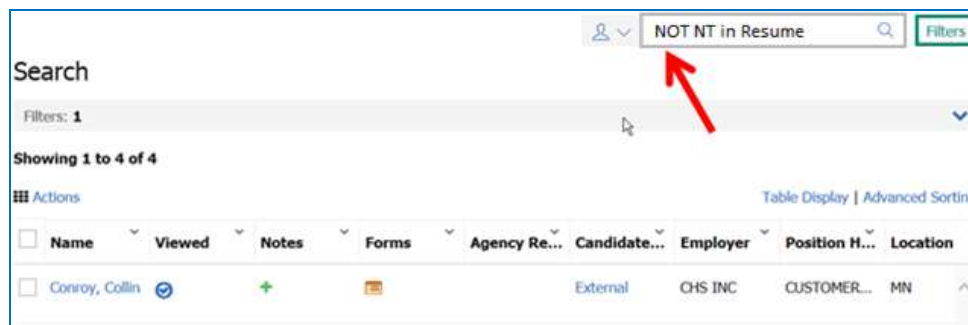


Figure 9- 15: Search Using Boolean Search Term: NOT

- **Keep in mind that the more times you use AND, the narrower your search gets, and the fewer resumes/CVs your search results will include.**
- **Be careful when using NOT as you may exclude resumes/CVs you do not intend to exclude.**

Filing to Folders

At this point, we have created a working folder, conducted candidate searches and found resumes/CVs. As candidate searching is used primarily to help develop talent pools, most organizations file search results to working folders, not req folders. This is due to the fact that applicant flow is tracked only within req folders.

Filing to Working Folders

Now that you understand how to run searches in *BrassRing*, you can file candidates into your working folder and begin building your Talent Pipelines.

To file candidates to a working folder from the search results page:

1. From the search results page, select the candidate(s) by clicking the check box(es) next to their name.
2. Click the **Actions** menu and select **File to Folder**
3. In the Destination section, select the folder(s) to send the candidate(s) to. (Hold the Ctrl key to select more than one folder). Refer to Figure 9-16 for a preview.
4. If your process dictates, select an HR status from the **Select an initial HR status** drop-down window, and an **Action date**. If you do not select an HR status, the default will be 0-Filed. The **Action date** will default to today's date.
5. Click **File**. At this time you can choose to send an eLink of the candidates filed to the working folder by clicking Send eLink or simply click OK to close the confirmation window.

- **If you do not select a status when filing to a folder, *BrassRing* will automatically update your candidate to 0-Filed. This simply means that the candidate has no HR status within your applicant flow (0), and that they are merely Filed to a folder.**
- **Up to 100 candidates can be filed or moved to a folder at one time.**

Figure 9-16: Filing to working folders from candidate search results

Filing to Req Folders

Depending on your company's process, you may be able to file candidates directly to a req folder. This is likely not the case.

- **Note:** If you manually file a candidate to a req folder, you risk not being compliant, as the candidate you filed may not have expressed interest in the req.

To file candidates to a req from the search results page:

1. From a list of candidates, select the candidate(s) to be filed by clicking the check boxes next to their name.
2. Click **Actions** menu and select **File to Req**.

In the **Destination** section, select the req folder(s) to send the candidate(s) to. Refer to Figure 9-17 for a preview.

3. Select an **Initial HR status**, and an **Action date**, if desired. If you do not select an HR status, the default will be 0-Filed or the status your organization has defined for manually filed candidates.

4. Decide if you want to e-mail all users who have this candidate active in one of their folders. This will send an e-mail to each person who has that same candidate in a working or req folder they own, letting them know you filed a candidate to a req.
5. Click **File**. If you have tried to file a candidate to a req with no remaining positions, *BrassRing* lets you know this in a message and the candidate is not filed.

File to Req - 2 candidates

Fields marked in asterisk (*) are required

Destination req *

Search...

HR Status

Select an initial HR status:

0-Filed

Action Date:

9/8/2016

E-mail all users with this candidate active

Figure 9-17: Filing to a req folder

Attaching Candidates to Reqs

In the previous section, we discussed how candidates found through a Candidate Search can be filed into a Working Folder. This filing of candidates to a Working Folder is the creation of a Talent Pipeline. A req may open in the near future, but you do not have any promising candidates who have applied for the job. By referring back to your Working Folder, you are able to attach some of the candidates in the Working Folder to the req folder.

From Working Folder to Req Folder

In an effort to be compliant, best practice is to permit candidates to learn about open jobs and express interest by applying to them through your Talent Gateways. In Chapter 3, we discussed how Talent Gateways allow organizations to ask pre-qualifying questions of their candidates, and to have them complete certain forms while applying. Those individuals whose resumes/CVs have been filed to a working folder can be sent an e-mail communication, alerting them that an open job to which they might be interested has been posted. This would allow them to apply, and thus express interest.

The steps below illustrate the functionality which allows resumes/CVs to be moved, or copied, from a working folder to a req folder. It is strongly recommended that you consult your administrator and be certain you are following your designated hiring process and best practices defined by your organization.

To Move or Copy a resume/CV to a req folder from a working folder:

1. From a list of candidates, select the candidate(s) to be moved (or copied) from the working folder to the req folder. Click Move/copy to req.
2. Select either the **Move** or **Copy** option. See Figure 9-18.
3. Highlight the Req to which the candidate will be filed.
4. Select either **Move** (the candidate will be completely removed from the working folder you are in now) or **Copy** (the candidate will remain in both the working folder you are in now, but a copy will be made and placed in the req folder).
5. Select whether or not you wish to **Retain the HR status data** in the new req folder. Meaning that if the candidate(s) you are moving to the req have an HR status assigned to them within the folder they are currently in, they will retain (and display) that same HR status in the folder they are being placed in. If you select **Do not retain any HR status data** the candidates will appear in the new req folder with a 0-Filed HR status.
6. If available, **Notify users working with this candidate** triggers a mass e-mail to any BrassRing users who, like you, have that same candidate in an active folder of their own.
7. Click either the Move or Copy button, depending upon the choice made in Step 2. Click OK.

■ **Your company may have opted for *BrassRing* to automatically file, every 24 hours, candidates who directly apply for a specific req to that req folder. This is called Auto-File. Your company may have opted instead to use Instafile. This automatically files candidates immediately to the req folder to which they applied. Check below if either option applies to you.**

- **My company uses Auto-File.**
- **My company uses Instafile.**

Move/Copy to Req - Santoro, Jim

Fields marked in asterisk (*) are required

Destination req *

Search...

HR Status

Retain the HR status data (including history) of all candidates in this folder when entered into the destination req.

Do not retain any HR status data for these candidates from this folder in the destination req.

E-mail all users with this candidate active

Candidate forms to copy

Move Copy Cancel

Figure 9-18: Moving or copying candidates from a working folder to req folder

From the req folder, you continue to update the HR statuses for candidates as they progress through the hiring process.

Eventually, someone in your folder will be at a hired stage and all other candidates are no longer being considered for the req and are assigned to a final HR Status. The final status may be similar to Company Not Interested or Candidate Not Interested. This was discussed in greater detail in Chapter 7.

- Part of being compliant is that candidates express interest in a particular job. It is because of this that such a process would state that ideal candidates filed to a working folder who were sourced need to be contacted. This lets them know to go online and apply for particular jobs.

Chapter Summary

- You can search on fielded information, codes, and fields from forms designated as searchable.
- Quick Search supports the use of Boolean searching.
- Using AND narrows searches, OR broadens searches, and NOT excludes resumes/CVs from searches.
- Candidate types allow you to filter your search for a specific candidate population.

Check Your Skills

Answer these True or False Questions:

1. You can use Boolean searching in the Quick Search field.
2. Using Boolean search term AND narrows your search.
3. Using Boolean search term OR broadens your search.
4. Searching in *BrassRing* is case sensitive.
5. **Managed Saved Filters** allows you to rename or delete your saved filter/search.
6. You click **Save search** to change search fields.
7. You can search for resumes/CVs entered through Talent Gateways as soon as they are submitted.

Perform these hands-on exercises in BrassRing:

8. Run a search for your typical candidate traits.
9. Remove two search fields and add three new ones.

Appendix A: Standard Reports

Appendix Overview:

BrassRing Standard reports are designed to help you accurately track and report on talent relationship activities as well as reduce cost-per-hire and time-per-hire.

These reports streamline the reporting process while providing you with robust, usable data.

Objectives:

At the end of this appendix you will be able to:

- Identify standard report options available in *BrassRing*
- Run a standard report

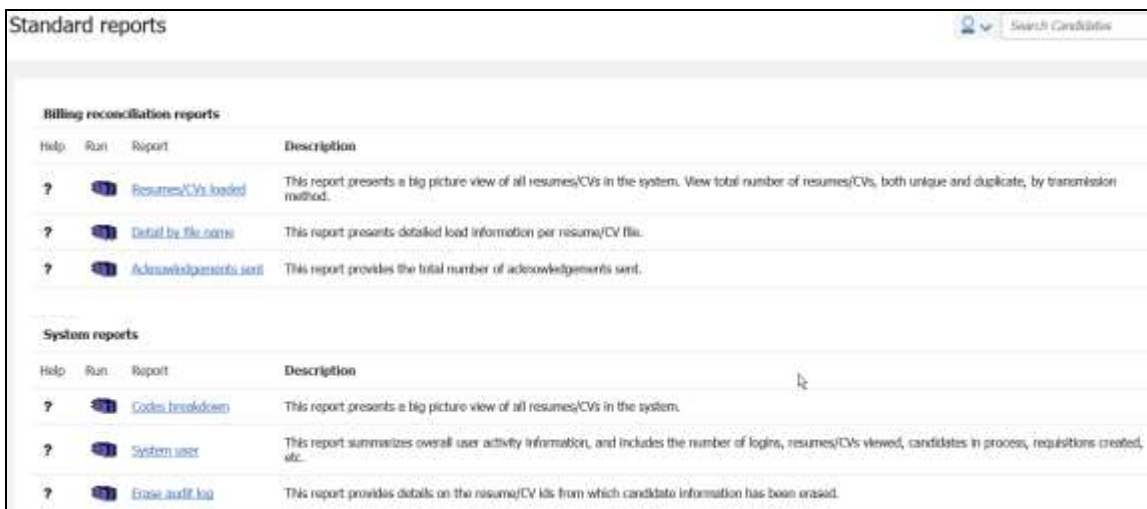
BrassRing Standard Reports

BrassRing Standard reports are always selected from the Reports menu page. Access to data collected through specific reports is based on both your user type and the organizational group to which you are assigned, both of which are maintained by your Super User.

The Reports menu page provides descriptions for each report and allows you to specify a reporting preference.

To access the Reports menu page:

From the **Hiring Navigation icon** , click **Reports * Standard Reports**. Then select an individual report from the drop-down menu.









Billing reconciliation reports			
Help	Run	Report	Description
?		Resumes/CVs loaded	This report presents a big picture view of all resumes/CVs in the system. View total number of resumes/CVs, both unique and duplicate, by transmission method.
?		Detail by file name	This report presents detailed load information per resume/CV file.
?		Acknowledgements sent	This report provides the total number of acknowledgements sent.
System reports			
Help	Run	Report	Description
?		Codes breakdown	This report presents a big picture view of all resumes/CVs in the system.
?		System user	This report summarizes overall user activity information, and includes the number of logins, resumes/CVs viewed, candidates in process, requisitions created, etc.
?		Erased user log	This report provides details on the resume/CV IDs from which candidate information has been erased.

Figure A- 1: BrassRing Standard reports page

- **Your company may have also opted to configure the Diversity Breakdown Report which is formatted to be printed for submission to EEOC.**

Categories of BrassRing Standard Reports

This appendix covers only the types of *BrassRing* Standard reports that most typical users can access. These reports fall into the categories of:

- Hire/Req reports
- TRM dashboard reports

The Data Insight tool (DIT) is a reports option which is detailed via an online, self-study course on the **Support Portal > IBM Kenexa Talent Suite > Training > Product Documentation and ELearnings > Talent Suite – Data Insight Tool.**


Elements of BrassRing Standard Reports

Keep the following considerations in mind as you access *BrassRing* Standard reports:

- The Reporting database is replicated daily in the early morning. Therefore, Standard Report results most likely reflect the previous day's data. The Data Insight Tool is replicated three times per day (12:00 am, 8:00 am, and 4:00 pm EST). Depending on when you run the report, results may not reflect the previous 8 hours of activity within the system.
- All of the reports have the same look, feel, and functionality.
- Filter options enable you to select the specific information you want displayed in your report. Filter options are available for all BrassRing Standard reports.
- BrassRing Standard reports display in a browser window with the report results displayed in the frame of the format that you select for output.
- If you do not have privileges to view a particular req field-derived output field, the data in that output column is replaced with the * character, and the associated sorting/grouping options in Adobe Acrobat are removed.
- If you can see only **My reqs** in BrassRing, as opposed to **All reqs**, then your reports will pull data taken only from your reqs.
- If you only see certain candidate types (Internal, External, Past Employee, Agency, etc.) when searching for candidates, then reports you run that include candidate data based on candidate type will likewise only provide access to those candidate types.

Running BrassRing Standard Reports

To view a *BrassRing* Standard report:

1. From the **Hiring Navigation icon** , click **Reports * Standard reports**.
2. Click on the **Name** of the report you would like to run.
3. Select the filters to apply to the report and an output format.
4. Run the report.
5. When you receive the report results, use the **Sorting and Grouping** options on the left side menu within Adobe Acrobat to display the results.

Here is an example of typical filter options:

Figure A- 2: Report filter options

- 🕒 To schedule a report, follow the same steps for running a report except click **Schedule report** button and then define the frequency, recurrence as well as the distribution list for the report.
- 📌 Your organization has made many decisions regarding the data that is used to both run, as well as display in results of, the following reports: **HR Action Activity, New Hire, Open req activity, Req status summary, Diversity hires, and Time to Fill.**

Title	Date opened	No. of positions	Positions remaining	Candidates in req. folder	Candidates in req. status	Candidates in intermediate status	Cost
HR Admin Assistant	2-Jul-2010	1	0	33	1	2	
Total Reqs		Positions	Remaining	Candidates	Start status	Intermediate status	
		1	1	0	33	1	2

Title	Date opened	No. of positions	Positions remaining	Candidates in req. folder	Candidates in req. status	Candidates in intermediate status	Cost
AutoClass_TEST Analyst	2-Jul-2010	1	0	5	1	2	
Total Reqs		Positions	Remaining	Candidates	Start status	Intermediate status	
		1	1	0	5	1	2

Figure A- 3: Sorting and grouping options

Hire/Req Report

Hire/Req reports display information about the status of hires and reqs.

Hire/Req reports include:

- New hire report
- Open req activity report
- Req status summary report
- Req history report
- Cost per hire report

- **Click on Help in the top toolbar for more information about the specifics of the report you've run.**
- **You will find descriptions for all Standard reports in *BrassRing* using the online help for each, noted with a bold question mark on the left side of the Standard reports page.**

Open Req Activity Report

This report provides information on any req with open status as of the date specified (cumulative total). Information can be sorted and grouped by location, department, manager, etc., and viewed as a text report or pie chart.

Uses of the Open req activity report include:

- Monitor and analyze open req activity as of a specific date. For example, monitor and analyze by recruiter, by location or by department.
- Identify trends and bottlenecks within the hiring process.

Open req activity

Sorted by AutoReqId

AutoReqId: 15485R

Job Title	Date started	No. of positions	Positions remaining	Candidates in req. status	Candidates in req. status	Candidates in intermediate status	Candidates in final status	Division	Location	Manager	Recorder
Office Manager - Executive Assistant	10-Jun-2018	1	1	4	0	0	0	Finance	Monaca Island, NE	Tuesday, Daniela	Tuesday, Daniela
Total Req		Positions	Remaining	Candidates	Start status	Intermediate status	Final status				
		1	1	4	0	0	0				

AutoReqId: 17245R

Job Title	Date started	No. of positions	Positions remaining	Candidates in req. status	Candidates in req. status	Candidates in intermediate status	Candidates in final status	Division	Location	Manager	Recorder
Internet Recruiting Specialist	4-Aug-2018	1	1	1	0	0	0	Finance	San Francisco	Internet, Mike	Internet, Mike
Total Req		Positions	Remaining	Candidates	Start status	Intermediate status	Final status				
		1	1	1	0	0	0				

AutoReqId: 17365R

Job Title	Date started	No. of positions	Positions remaining	Candidates in req. status	Candidates in req. status	Candidates in intermediate status	Candidates in final status	Division	Location	Manager	Recorder
HR Generalist	4-Aug-2018	1	1	2	0	0	0	Finance		Internet, Mike	Internet, Mike
Total Req		Positions	Remaining	Candidates	Start status	Intermediate status	Final status				
		1	1	2	0	0	0				

AutoReqId: 17465R

Figure A- 4: Open req activity report

- When users select Current as the date range filter for Open Req Activity, the report returns data for all reqs in the open status as of the last reporting server refresh, which takes place every 24 hours (12AM and 3AM ET (GMT/UTC-5 hours)). In the report output, the column “As of <current date>” is populated with Today’s date in the report output.

TRM Dashboard Reports (Talent Relationship Management)

TRM dashboard reports provide key metrics to help drive budget and resource allocation decisions and act as a guide for promoting change within your organization. Typically these reports are intended for use by HR executives.

The types of TRM dashboard reports available include:

- Diversity hires report
- Source yield report
- Talent pipeline report
- eLink responsiveness report
- Time to fill report
- Req ageing report

Talent Pipeline Report

This report provides a global view of all HR statuses in the system as of one day prior. It is designed as a pipeline report, so only those candidates considered to be either beginning (e.g., Phone Screen, 1st Interview) or mid-cycle (e.g., 2nd Interview, Offer Made) in the HR cycle are included. Note that

candidates moved to a final status are no longer considered to be in the pipeline and therefore are not included in this report. Information can be viewed in a text format or as a bar chart.

Uses of the Talent pipeline report include:

- Analyze overall hiring process flow.
- Analyze hiring process flow per recruiter, manager, department, location, etc.

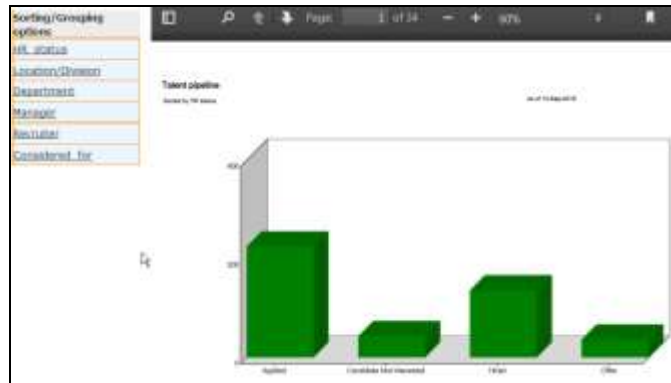


Figure A- 5: Page 1 of a Talent pipeline report

Reports Queue

You can administer all scheduled reports from the Reports Queue.

You can also track progress and download the reports generated from the Reports queue in the Reports Module of BrassRing.

If the report has been generated, a link to download the report will be available from the Reports queue.


All reports will be delivered via e-mail to the requestor in the format selected on the filter page. Users who have the ability to run a report have the ability to request report delivery. Users with authorized access to the Reports queue can see all reports that have been generated over the last 14 days, and can download and review those reports from this location.

Reports in the Reports queue will be of one of the following statuses:


- Scheduled
- Running
- Suspended
- Completed
- Failed

Once at the status of completed, the report can be downloaded from the Reports queue.


To suspend and restart a report

1. Navigate to the **Hiring Navigation icon**  , click **Reports * Reports queue**.
2. The Reports queue window pops up.
3. By default, you are viewing your reports. If you wish to view all reports, click on the All reports link at the top of the screen.
4. Select the radio button of the report you wish to suspend, and click either Suspend scheduled report or Restart scheduled report in the Actions menu on the left of the screen.
5. The report's status changes to the option you selected in #4.

To remove a scheduled report

1. Navigate to the **Hiring Navigation icon**  , click **Reports * Reports queue**.
2. The Reports queue window pops up.
3. By default, you are viewing your reports. If you wish to view all reports, click on the All reports link at the top of the screen.
4. Select the radio button of the report you wish to remove, and click the Remove scheduled report link in the Actions menu.
5. A popup window asks if you are sure you want to remove the report. To confirm the removal, click the OK button.
6. The report is removed from the queue.

To edit a scheduled report's schedule

1. Navigate to the **Hiring Navigation icon**  , click **Reports * Reports queue**.
2. The Reports queue window pops up.
3. By default, you are viewing your reports. If you wish to view all reports, click on the All reports link at the top of the screen.
4. Select the radio button of the scheduled report whose schedule you wish to edit, and click the Edit report schedule link in the Actions menu.
5. The report's scheduled information appears in a popup window. Make any desired changes to the schedule and click Save.

Voided status for reports in the Reports queue

Reports in the Reports queue can have a status of Voided. A report schedule is voided when a standard report filter field that is set to a specific value (not All) is replaced by a customized filter field, rendering the filter criteria for the scheduled report invalid.

You can view details of the voided schedule for up to fourteen days following the report configuration change and then it is deleted from the queue. You cannot edit report schedules with a status of Voided. You must create a new report schedule using the replacement custom report filter(s).

Chapter Summary

- All BrassRing Standard reports follow the same basic procedure to execute.
- To display information about hires or reqs, run a Hire/Req report.
- The Talent pipeline report shows the details of candidates in your company's pipeline.
- The Data Insight tool is a reports option which is detailed via an online, self-study course on the **Support Portal > IBM Kenexa Talent Suite > Training > Product Documentation and ELearnings > Talent Suite – Data Insight Tool.**

Appendix B: Data Insight Tool

Appendix Overview:

Welcome to the Data Insight Tool (DIT). As a DIT user, depending on your user role, you can take the following actions:

- Create report templates for your own use and store them in your template library.
- Create categories for classifying and organizing your templates.
- Attach Excel macros to templates to format results.
- Run ad hoc reports on the spot using your templates.
- Schedule your templates and send the results automatically to users included in a distribution list.
- Send your templates to other system users.
- Change your templates at any time.
- Download your jobs from within the Data Insight Tool or via eLinks.

Objectives:

At the end of this appendix you will be able to:

- Run a report through Data Insight Tool
- Schedule a report

BrassRing Data Insight Tool (DIT)

The Data Insight Tool (DIT) allows users to create their own reports to run as adhoc or scheduled reports by using DIT templates which store the selected fields for the report as well as filter and filter criteria.

To access the DIT:

From the **Hiring Navigation icon** , click **Reports * Data Insight Tool * Manage Templates**.

It is important to remember:

- The DIT refreshes three times per day (12:00 am, 8:00 am, 4:00 pm EST).
- When scheduling a DIT report, users can select one of the three refreshes. This is an estimate timestamp as delivery depends on current system-wide DIT usage.
 - If you have a time sensitive report, we recommend scheduling your report for the 8:00 am or 4:00 pm EST timestamp. (As the first refresh typically is the most heavily selected by clients.)
- Scheduled reports take top priority in the queue and then ad hoc reports.
- We recommend being mindful of the amount of data you are reporting on. The more data in a report, the more time will be required by the DIT to produce the report. Please use filters and consider running multiple reports if minimize run time.

Creating New Templates

You can create a new template, or you can copy an existing template.

The steps for creating a new template are:

- Enter template name
- Working with output fields
- Select filters and filter criteria
- Review and Save the template

Enter the Template Name

To create the Template Identity

1. Enter the **Template Name (required)**.
2. The checkbox for **Hide inactive items in Template Workshop** is selected by default. Unselecting this checkbox will allow you to filter your report on inactive field options (optional). Once the template is saved this checkbox is locked down and you cannot change it. If you would like to filter based on an inactive option, you must create a new report template.
3. Select a **Default Time Zone** (optional).
4. Enter a template **Description** (optional).
5. Select the **Report Type**.
 - **Default:** Generates reports with current functionality; only reqs with at least one associated candidate will be returned.

- **Requisition:** Returns all req rows regardless of whether candidates are attached to a req or not.
 - **Working Folder:** Returns all folder rows regardless of whether there are any candidates in the folder.
6. Select the **Template Output**. Delimited by:
 - **Tab** – Default for Character Encoding is Unicode.
 - **Comma** – Select Character Encoding of Unicode or ANSI.
 7. Select the **Template Output** field **Exclude HTML tags from text fields and headers** (optional). This will automatically remove any HTML tags in your report output.
 8. If applicable, select the checkbox for **Make this template public** which allows others to run this report.
 9. Click **Next >**.
 10. Select **Filters** and **Filter Criteria** and **Output Fields** (in any order).

Hiring Navigation icon  > Reports > Data Insight Tool > Manage templates > My Template Library > Create New Template > Template Identity > Template Workshop

Working with Output Fields

Use the **Output Selection Tool** to select the output fields for this template. These output fields become your report columns.

Elements of Output Fields

- You must select at least 1 output field.
- You can select a maximum of 75 fields.

You cannot select the same field twice.

- You can add one or several fields at a time.
- The order in which you select the fields in the Output Selection Tool will be the order they show up in the Worksheet.

Selecting Output Fields

To select output fields:

1. Select the **Output Worksheet** to display it in the foreground over the **Filters Worksheet**.
2. The **Output Selection Tool** appears above the worksheet.
3. In the **Output Selection Tool**, click the plus sign for each functional area containing the fields you want to select as report columns.
 - Using the Search option in the upper right corner of the window can be helpful if you are not sure which functional area the field resides under.
4. Select the check box for each field that will be an output column.
5. Click **Add to Worksheet**.
6. The field is added to the first column in the worksheet.

7. The names of the selected output fields are the column titles for your report. Enter a new name for individual column titles below the **Default Name** for a column if desired.

Output Language

- Insight displays one record in the output in your language (the language associated with your profile).
- If the retrieved data does not exist in your language, Insight displays it in your organization's base language.
- If the retrieved data does not exist in your organization's base language, Insight displays it in the requisition's base language (if a req is referenced in the filter selections).

Renaming an Output Field

You can rename an output field. The new name displays as the column title in the report output, replacing the default name. Important: Your edits to the template are not saved until you proceed to the **Template Summary** page and click **Save**.

To rename an output field:

1. Click in the **New Name** cell below the output field to be renamed.
2. The **New Name** cell becomes active.
3. Enter the new name for the output field.
4. Click outside of the cell to save the new name in the **Output Worksheet**.

Restoring the Default Name

To restore the default name:

1. Click the undo icon next to **New Name** text.
2. Click **Remove** to confirm the removal of the new name.
3. The system removes the new name and restores the default name for the output field.

Changing the Column Order

To change the order of the output columns on the report output:

1. Click **Reorder Columns**.
2. The change column order window opens.
3. Select the output column to be moved up or down.
4. Click the **Up** or **Down** arrow to move the column into the desired position.
 - Clicking **Up** moves the output column to the left in the worksheet.
 - Clicking **Down** moves the column to the right in the worksheet.
5. Click **Save** when you are finished reordering the output columns.
6. The system updates the **Output Worksheet**. The column(s) are in their new position.

When you are finished selecting, renaming, and reordering output columns, continue to the next step:

1. Select filters and filter criteria
OR
2. Click **Next >** to review the template summary.

Important: Your edits to the template are not saved until you proceed to the **Template Summary** page and click **Save**.

Selecting Filters and Filter Criteria

Elements of Selecting Filters

Standard BrassRing filters and fields are grouped by functional area in the selection tool. Custom filters and fields are listed in alphabetical (123/abc) order.

- You do not have to select any filters; filters are not required.
- You can add 1 or several filters at the same time.
- You can select a maximum of 10 filters; you cannot select all filters.
- You can select a filter once only.
- You cannot use encrypted fields as filters; you can select them as output fields.
- The order in which you select the fields in the Filter Selection Tool will be the order they show up in the Worksheet.

To select template filters:


1. Click the plus sign beside each functional area to display the list of filters
2. Select up to 10 filters in total. You can select one at a time or several at once.
3. Click **Add to Worksheet**.

Elements of Selecting Filter Criteria

Each filter belongs to a functional area in BrassRing and has a set of criteria associated with it.

- You must select a criterion or criteria for each filter added to the worksheet, with the exception of My Reqs and My Working Folders.
- You can select filter criteria that are of the following field types: Text field, Numeric value, Date, Date and Time, Multi-select List, Yes / No Boolean, and Status.
- You can select a maximum of 50 criteria for each filter.
- Using the Search option in the upper right corner of the window can be helpful if you are not sure which functional area the field resides under.

To select filter criteria:

1. Click the green arrow  to the left of the filter in the filters worksheet.
2. Select filter criteria for the filter. The selection method depends on the filter's data type, as shown in the table below.

How Filters are Applied

Insight does not apply language rules when the query is executed at runtime.

When you select more than one filter, Insight applies the logical operator AND to those filters.

If you select more than one option as filter criteria for a specific filter, Insight applies the logical operator OR to the filter criteria for a specific filter.

Reviewing and Saving Templates

The **Template Summary** page displays all of the attributes for the template you created.

1. Review the summary.
2. If necessary, go back and edit the template.
3. Select an option to save the template:

Save Template in Library - The template is added to the template library in the **Default Category** section. You can run it later as an ad hoc job, or schedule it later to run as a scheduled job. **Note:** Public templates are automatically stored in the **Public Templates** category in all applicable Template Libraries. You cannot move them to a different category.

Save Template in library, and launch Schedule Wizard - The template is saved and the Schedule Wizard opens.

Save template in library, and run now - This is an Ad Hoc job. The template is saved and the system starts to generate the report.

Saving a Template to the Library

To save the report template to the Template Library:

1. On the **Template Summary** page, click **Save template in library**.
2. Standard (private) templates are added to the Template Library in the **Default Category** section. Their run mode is Not Scheduled.
3. You can move the template to another category. (You might have to create the category first.)
4. The template wizard closes.

You can run it now (this is an ad hoc job) or schedule it now or later.

Note: Public templates are automatically stored in **Public Template** category in all applicable template libraries. You cannot move them to a different category.

Saving the Template and Scheduling the Report

To save the report template and schedule the report to run in the future:

1. On the **Template Summary** page, click **Save template in library, and launch Schedule Wizard**.
2. The schedule wizard appears.
3. Follow the steps in the Scheduling Jobs section.

Saving the Template and Running It Now

To save the report template and run the report now as an ad hoc job:

1. On the **Template Summary** page, click **Save template in library, and run now**.
2. The Data Insight Tool runs the report immediately as an ad hoc job using the template you created.
3. Follow the steps for downloading ad hoc jobs.

Working with Categories

Every DIT template must have a category. When you create a template, its category is the **Default Category**. You can create your own categories to classify your templates. There is no limit to the number of templates you can place in a category.

Default Categories for Templates

The Data Insight Tool's default categories are:

- **Default Category:** By default, all of your private templates are stored in this category until you create your own categories and move your templates to them.
- **Public Templates:** Public templates are always stored in this category and you cannot move them.
- **Received Templates:** Templates sent to you by other users are stored in this category. You can move them to another category.

You cannot delete or rename default categories.

Custom Categories

You can create custom categories for classifying your templates.

- Each category must have a unique name within your library.
- You can create up to 97 categories for a total of 100 (97 custom plus 3 default categories).
- The Template Library displays 15 categories per page.
- You can create categories before you make any templates, but you cannot open the category until it has templates in it.
- Custom categories are listed in alphabetical (123/abc) order.
- You cannot sort categories. (You can sort templates.)
- You cannot search for categories. (You can search for templates.)

Creating New Categories

Hiring Navigation icon  > Reports > Data Insight Tool > Manage templates > My Template Library > Create New Category

To create a new category:

1. Click **Create New Category** in your template library.
2. Enter the name of the category.
3. Save the category.

Moving Templates to Categories

By default, all templates are stored in the category Default Category. You must create at least one category before you can move a template out of the Default Category.

To move a template to a different category:

1. In your template library, find and select the template you want to move to a different category.
2. Click **Move**.
3. In the dialog box, select the new category from the list.
4. Click **Move**.
5. The template is moved to the new category in your template library.

Viewing Categories

To open a category and view its content, click the + sign of the closed category.

Renaming Categories

You can rename your categories. You cannot rename the default categories.

To rename your category:

1. Select the category.
2. Click **Rename**.
3. Enter the new name.
4. Click **Save**.
5. The category name is updated in the Templates Library.

Deleting Categories

You cannot delete default categories.

You cannot delete a category that contains templates. You must move the templates within that category to another category before deleting it.

Hiring Navigation icon  **> Reports > Data Insight Tool > Manage templates > My Template Library**

Security

Template Security

- The Data Insight Tool maintains the candidate and req form- and field-level security for form fields configured in BrassRing.
- Only Data Insight Tool administrators can create Public Templates. Regardless of who runs these templates, the system applies the security rules of the user who created the template.
- When a user sends a template to another user, the sent template is a separate entity. The system applies the security rules of the user running the template.
- User Role security is applied at template run time. This means you can see all filters, filter criteria, and output fields when creating the template and your actual user role restrictions are applied when the template is run.

Form and Field Level Security

In the course of creating several different types of forms in Workbench, form creators add fields to those forms and select security settings for them. These fields are found on Candidate forms, Req forms, Req status change addendum forms, and Req Subsidiary forms.

Data Insight Tool users may be able to see and select filters, filter criteria, and output fields for their report templates, but the **Hide for these user types settings** in BrassRing determine what data they can see in output columns when the report is actually run. If a specific field is hidden for your BrassRing user type, you will see asterisks in the output columns.

If a candidate form is hidden for your user type in BrassRing, you can still select filters from it in the Data Insight Tool but no filtering is done. All the data are returned but there are asterisks * in every column.

Supported Characters

All fields (except numeric fields) accept the following characters in any order:


- Alphabet
- Numbers
- Unicode
- Special characters, excluding the following:
 - The asterisk *, colon :, question mark ?, back slash \, vertical bar |, slash /, and ampersand &
 - HTML tags (for example, "<" and ">")
 - Script or programming code
 - If you start or end a character string with spaces, the Data Insight Tool removes the spaces. For example, if you entered the character string as New Hires Template, it will be saved as New Hires Template.

Naming Template and Categories

- Template names are not case-sensitive.
- For template names, user roles, and categories, the system treats accented characters (á, ã, ü, and so forth) as new instances.

For example, if a user creates a category called My Resume and later changes it to My resumé, the system accepts the change without error. After that, if the user creates another category called My resume, the Data Insight Tool accepts it because the accented and unaccented "e" is recognized as different characters by the system.

Grid Display

- By default, grid contents are displayed in ascending  (123/abc) order.
- You cannot edit items in the grid directly.

Working with Public Templates

If you are a Data Insight Tool administrative user, you can create and edit public templates and make them available by user role to other Data Insight Tool users.

Note: Data Insight Tool administrators can complete this task. Non-administrative users do not see the **Make this template public** check box.

Creating Public Templates

To create a public template:

1. In the **Template Identity** window, select the check box for **Make this template public**.
2. The **Public Template** area expands.
3. Select the check boxes for the user role(s) that will be granted access to this template. Give access to:
 - a. **Admins only** (the default)
 - b. **Admins and these User Roles:** If you select this option, the list of user roles in the multi-select box displays. No user roles are selected by default.

Editing Public Templates


If you are a Data Insight Administrator, you can edit public template.

Rules for Editing Public Templates

- You can edit the name, description, filters, filter criteria, and/or output fields of a public template.
- Edits to a public template affect all instances of that template.
- Rules for adding filters, filter criteria, and output fields are the same as the rules for creating new templates. **Note:** If you wish to add filter(s) to a template, you must delete existing filter(s) if the current template has 10 filters.
- If you rename the template, schedules associated with the previous name are transferred to the renamed version.

- If you edit a template without renaming it, existing schedules for that template remain in force.
- If you make a template non-public OR if you limit access to administrative users only, the associated schedules are suspended for 60 days, after which the system deletes them.
- If you are an Insight administrator and you change a public template that you did not create to a non-public template, you can select only the **Save to Library** option when saving the template.

To edit a public template:

1. From the **Navigation Hiring icon**  , select **Reports * Data Insight Tool * Manage Templates**.
2. Find the public template you want to edit in the Public Templates category in the Template Library.
3. Click **Edit Template** in the left navigation panel.
4. The template wizard opens.
5. Edit the template as described in the Editing Templates section. See Rules for Editing Public Templates for additional information.
6. When you reach the **Template Summary**, the Data Insight Tool displays the following message: “To avoid confusion, notify affected users about changes to this template.”
7. Click **Save**. Your changes to the template are not permanent until you save the template.
8. The template changes are saved to the database and to the template library. If the template is still public, all instances are updated.

Suspended Schedule for Public Templates

If a Data Insight Tool administrator makes a template non-public or limits access to administrative users only, the associated schedules are suspended for 60 days, after which the system deletes them.

Data Insight Tool displays the following message: “To avoid confusion, notify affected users about changes to this template.”

Working with Macros

You can format the results of your private templates by attaching Microsoft Excel 2007 macros which have already been created and saved in an .xlsm file.

Note: Users must create macros using Excel 2007. However, users can download and open templates with an attached macro to a machine with Excel 2003.

Topics in this Section:


- Suggested Macro Workflow
- Attaching Macros to Templates
- Replacing Macros
- Removing Macros

Suspended Macro Workflow

Important: You can attach Excel 2007 macros only (not macros created in an earlier version of Excel). The macro file must have an extension of .xlsm.

Note: Insight users who have Microsoft Excel 2003 installed on their machines can download and use templates with attached macros created in Excel 2007. There may be a minor loss of fidelity as a result of the conversion to the earlier version of Excel.

The suggested workflow for creating and attaching macros to templates is:

1. Create the template.
2. Run your template job (either ad hoc or by scheduling it).
3. Download and open the .csv file containing the job results.
4. Review the output in the .csv file.
5. Determine the required macro(s) to be added in an Excel 2007 spreadsheet.
6. Create the macro(s) in Excel 2007.
7. Save the Excel 2007 file as an .xlsm file on your hard drive, noting where you saved it.
8. From the **Navigation Hiring icon** , select **Data Insight Tool * Manage templates**.
9. Select the template to which you want to attach the macro (.xlsm) file (the template you created in Step 1).
10. Click **Attach/Replace Macro** in the left navigation panel.
11. Follow the procedure for attaching or replacing a macro as necessary.

Attaching Macros to Templates

To attach a macro for the first time, or replace an existing macro:

1. In the template library, find and select the template to which you want to attach a macro.
2. Click **Attach / Replace Macro** in the left navigation panel.
3. In the pop-up window, click **Browse** to navigate to the location where you saved the macro file and select it. The file can contain data in addition to the macro formula. **Note:** Macro files have the extension .xlsm.
4. Click **Attach**.
5. Insight attaches only the macro(s) within the macro file to the template and not any data within the macro file.
6. The template name is annotated with the name of the macro file in the **Template Name [macro]** column; for example: Talent Pipeline **[talentPipelineQtr.xlsm]**.

Macros and Public Templates

To replace an attached macro:

1. In the Template Library, select the template for which you want to replace the attached macro.
2. Click **Attach / Replace Macro** in the left navigation panel.

3. In the pop-up window, click **Browse** to navigate to the location where you saved the replacement macro file and select it. **Note:** Macro files have the extension .xlsm.
4. Click **Attach**.
5. Insight attaches only the macro(s) within the macro file to the template and not any data within the macro file.
6. The template name is annotated with the name of the macro file in the **Template Name [macro]** column; for example: Talent Pipeline [**talentPipelineQtr.xlsm**].

Removing Macros

IMPORTANT: You can remove macros from public templates only if you are an administrative user.

When you remove a macro from a public or private template:

- The macro is removed from all scheduled and ad hoc job results that will run in the future.
- The macro is not removed from scheduled and ad hoc job results that have already run when the macro was attached.
- The macro is not removed from a scheduled or ad hoc job that is currently running.

To remove a macro:

1. In your **My Template Library**, select the template for which you want to remove the macro.
2. Click **Remove Macro** in the left navigation panel.
3. Click **Remove** in the confirmation message window to complete the removal.
4. The macro is removed from the template, and the macro file annotation to the template name is removed in the **Template Name [macro]** column; for example: Talent Pipeline [**talentPipelineQtr.xlsm**] becomes Talent Pipeline.

Using Excel Macros Format Results

You can format the results of your private templates by attaching Microsoft Excel 2007 macros which have already been created and saved in an .xlsm file. Administrative users can attach macros to Public Templates.

Deleting Templates

Only Data Insight Tool administrative users can delete Public Templates.

IMPORTANT: Administrative users who delete a public template should notify users on the distribution list.

Effect on Schedule of Deleting Templates

When you delete a template, all associated schedules are deleted. This applies to both public and private templates.

To delete a template:

1. On your **My Template Library** tab, find the template you want to delete and select it.
2. Click **Delete Template**.
3. Click **Delete** to confirm the action in the message window.
4. The template is removed from your template library. Schedules for this template are removed from your scheduled jobs.

Scheduling Jobs

You can run templates on a schedule of your own choice through your Template Library.

Number of Active Schedules Allowed

- A private template cannot have more than 1 active schedule.
- A public template cannot have more than 1 active schedule per user.

To set up template schedules:

1. Configure the run frequency.
2. Configure the distribution list.
3. Configure e-mail notification content.
4. Review and saving the schedule.

Configuring the Run Frequency

To schedule the report template to run in the future once or repeatedly:

1. Configure the **Frequency** setting.
2. Click **Next >** to configure the distribution list for the report results.

The earliest a scheduled report can run is on the next day. **Note:** If you want to run the report now, go to your **My Ad Hoc Jobs** tab and run the template as an ad hoc job.

Frequency Settings

How often?	<ul style="list-style-type: none"> • Once • Daily
-------------------	---

	<ul style="list-style-type: none"> • Weekly • Monthly • Bi-weekly (every two weeks/26 per year) • Semi-monthly (2 per month) • Run every [number of] days. (For example, Run every 10 days.)
Run daily on the following days	<ul style="list-style-type: none"> • Every day • Every weekday
Date Range	<ul style="list-style-type: none"> • Select a start date • Select an end date: <ul style="list-style-type: none"> - No end date (the default) - Specific end date (optional) • Select a data timestamp
Data Timestamp	<ul style="list-style-type: none"> • Select a data timestamp for your report

Configuring the Distribution List

To configure the distribution list for the report output:

1. Add system users on the **System Users** tab. You can:
 - Find and select the system user's name(s) you want to add in the **System Users** list box. The distribution lists 50 names at a time.
 - Select a maximum of 200 system user recipients.
 - You can enter up to 70 characters in lowercase, uppercase, or mixed case.
 - You can use the wildcards * (asterisk) and % (percent) to search.
2. Click the double right arrows >> to add them to the **Distribution List** box.
3. Add recipients on the **Non-System Users** tab, if applicable.
4. Enter the non-system user's e-mail address in the **E-mail Address** box. Make sure you use the correct syntax: username@domain.com, for example.
5. Click the double right arrows >> to add it to the **Distribution List**.
6. If necessary, repeat the previous step until you have finished adding non-system users' e-mail addresses.

Note: Users are listed in the distribution list in the order in which you added them.
7. Click **Next** >.

Configuring E-mail Notification Content

The Data Insight Tool sends the default notification e-mail to all recipients specified in the Distribution List when the report run results are available for download. You can change the default notification e-mail message if desired.

System User / Non-system User Notifications: E-mails (subject and message) are in your local language, unless you customize the content.

Reviewing and Saving the Schedule

1. Review the schedule summary. Click **< Back** to go back to an earlier screen to make changes if necessary.
2. Click **Save** to save the schedule to your **My Scheduled Jobs** library.

Downloading Job Results

After Insight completes a scheduled job, it sends a notification e-mail to the distribution list. After completing an ad hoc job, it sends a notification e-mail to you.

You can download and view job results for your own templates (including public templates to which you have access) from your **My Scheduled Jobs** tab and your **My Ad Hoc Jobs** tab.

For **Completed** jobs, click the template name to start downloading job results from either the scheduled jobs tab or the ad hoc jobs tab.

Understanding Job Results

Job results are sorted by **Last Run Date** in order from most recent to furthest back in time, with blank entries listed last.

Jobs can have the following statuses:

- Paused
- Completed
- System Error, Contact Help Desk
- Running

If there is more than one result for the same template, the most recent result is selected by default.

The format of the output filename is:


First (First 20 characters of the template name)_(Day and Month)_(Hour and Minute).csv

Example: *Headcount_06Jun_2315.csv*

Note: You can also download eLinked job results from within your e-mail.

Downloading Scheduled Job Results

To download scheduled job results from the **My Scheduled Jobs** tab:

1. From the **Navigation Hiring icon**  , select **Reports * Data Insight Tool * Manage templates**.
2. Select the **My Scheduled Jobs** tab.
3. Find the scheduled job whose run is completed using the **Search** function if necessary.
4. Click the hyperlink to view the report.
5. Select the download file format and whether to open or save the file.

Downloading eLinked Job Results

System users and non-system users included in the distribution list for the template schedule receive an e-mail notification when the scheduled job is ready. Users have access to the eLinked results for **14 days** after the run is completed. The date of run completion is counted as Day #1.

After the system runs the scheduled job, it sends the eLink to the distribution list with the results of the scheduled job run.

To download scheduled job results in e-mail:

1. Open the e-mail.
2. Click the eLink to start the download.
3. Select the download file format and whether to open or save the file.

Selecting File Format and Output

To select the file format and output:

1. If no macro file is attached, the download choices are:
 - a. **.csv in a ZIP file** (for large jobs)
 - b. **.csv**

If a macro is attached, the download file format is **.xlsm**.

2. Click **Download**.
3. The **File Download** dialog opens.
4. You can click **Open** or **Save**. If you click **Open**, you have the following options:
 - a. **Download in .csv in a ZIP file** (preferable for larger files)
 - b. **Download in .csv**
 - c. If a macro is attached, the download file format is **.xlsm**.

If you click **Save**, a typical **Save As** dialog box opens from which you can save the file.

Download Jobs with Attached Macros

Data Insight Tool users who have Microsoft Excel 2003 installed on their machines can download and use templates with attached macros created in Excel 2007. There may be a minor loss of fidelity as a result of the conversion to the earlier version of Excel.

Managing Schedules and Jobs


You can edit, pause, resume, and cancel scheduled jobs.

Editing Schedule Jobs

When you edit template schedules, the changes take effect immediately.

- You can edit paused schedules.
- You cannot edit schedules in the status, Running.

To edit a schedule:

1. From the **Navigation Hiring icon** , select **Reports * Data Insight Tool * Manage Templates**.
2. Select the **My Scheduled Jobs** tab.
3. Find and select the template whose schedule you want to edit and click **Edit Schedule**.
4. The schedule wizard opens.
5. Configure the job schedule for the template.

Pausing Scheduled Jobs

- You can resume running templates that are in the **Paused** status with active schedules (the schedules have not expired).
- If you want to resume a paused schedule but the schedule has expired, you can edit the schedule.
- When you resume a paused schedule, the start date is **Next Run Date** as of the current date + 1.

To resume a paused schedule:

1. On your scheduled jobs tab, find the scheduled job whose schedule is in the **Paused** status.
2. Select the radio button for the paused schedule.
3. Click **Resume**.
 - a. If you click **Resume** and the schedule is expired, the system prompts you to edit or cancel the schedule.
 - b. If you are resuming a job based on a public template to which you no longer have access, the system tells you how to clear it from your queue.
4. The system resumes the selected schedule.

It changes the schedule status to **Scheduled** on your scheduled jobs tab.

Expired Results

If you click **Resume** and the schedule has expired, the system prompts you to edit or cancel the schedule.

Canceling Scheduled Jobs

You can cancel scheduled jobs in any status by removing them from the scheduled jobs tab.

If you cancel a scheduled template, recipients of the e-mailed results can access existing results by clicking the eLink in the e-mail for up to **14 days** following the scheduled template run. However, users cannot access the report through your scheduled jobs tab.

To cancel a scheduled job:

1. Select the schedule on your scheduled jobs tab.
2. Click **Cancel**.
3. Click **Yes** to confirm that you want to cancel the schedule.

The Data Insight Tool deletes the schedule and changes the run status on the **My Template Library** tab to Not scheduled.

Suspending Schedules for Public Templates

If an Insight administrator makes a template non-public or limits access to administrative users only, the associated schedules are suspended for 60 days, after which the system deletes them. When you or an Insight administrator edits a template and reach the **Template Summary**, the Data Insight Tool displays the following message: "To avoid confusion, notify affected users about changes to this template."

Working with Jobs

This section describes general rules of behavior for scheduled and ad hoc jobs.

Searching for Jobs

You cannot search for scheduled or ad hoc jobs. (You can search for templates).

E-mail Notifications

After completing an ad hoc job, the system sends a notification e-mail to you. After completing a scheduled job, the system sends the notification e-mail to you and anyone you have added to the distribution list. (This is the notification e-mail you configured when creating the template schedule.)

All messages are sent from DataInsightTool@Brassring.com.

System Error, Contact Help Desk

If the scheduled or ad hoc job is unsuccessful, the job is listed as "System Error. Contact Help Desk." on the **My Scheduled Jobs** or the **My Ad Hoc Jobs** tab. Jobs with this status are not removed.

Job Expiration

Completed jobs (both scheduled and ad hoc) are automatically removed **14 days** after the **Last Run Date**. The job is still listed on your **My Scheduled Jobs** or **My Ad Hoc Jobs** tab, but the template name link becomes plain text.

Next Run Date

Once a job has finished running, Insight displays a **Next Run Date** only for scheduled jobs with the following statuses: **Scheduled**; **System Error**, **Contact Help Desk**; and **Running**. Paused jobs do not display the **Next Run Date** until the job is resumed and finished.

Deactivated Users

Schedules and Deactivated Users: If a user is deactivated, the schedules for that user are suspended for 60 days and then deleted.

Job Results and Deactivated Users: If a user is deactivated, the user will still be able to receive results from other users. The user remains on the distribution list until the owner of the schedule removes that e-mail address.

Appendix C: Scheduling Interviews

Appendix Overview:

BrassRing facilitates interview scheduling with hiring managers. All interviews are tracked in the candidate's Talent Record within BrassRing.

Objectives:

At the end of this appendix you will be able to:

- Send an Interview request.
- Send e-mail and letter correspondence.

Scheduling Interviews

Scheduling, an optional module within *BrassRing* that your company may have opted to use as part of your hiring process, assists you with scheduling interviews and communicating with hiring managers about them.

Elements of Scheduling

The following are considerations regarding Scheduling:

- Interview requests are intended to be sent internally, via e-mail, using eLink technology.
- Because BrassRing is a web-based product, there is no full integration with your company's e-mail program. However, clients may choose to implement the Outlook plug-in to perform some interview scheduling actions from within BrassRing.
- Once an interview request has been confirmed, interview schedules can be sent via e-mail to candidates as well as interviewers.
- *BrassRing* tracks the time it takes to schedule interviews.
- The statuses for Interview Requests are called: Pending, Accepted, Declined, Cancelled, and Expired.
- **Send interview request** allows you to see if the potential interviewer is willing to accept the scheduling of an interview.
- **Schedule interview** means the interview details have been arranged off-line, and allows the recipient to download the interview date and time into Microsoft Outlook (only). The scheduler cannot see the Outlook calendar and thus the potential interviewer's availability from within *BrassRing*.
- You cannot schedule an interview within two hours of the time you're creating the interview request.

Sending an Interview Request

To send an Interview request:

1. From a list of candidates, click the candidate's name to open the Talent Record.
2. Once the Talent Record appears, click the **Actions** button located in the upper right corner of the Talent Record. From the menu that appears click **Send Interview Request** or **Schedule interview**.
The Send interview request form appears.
3. To address the e-mail, select a user from the **To: (system users)** field or complete the **To: (non-system users)** field.
4. Enter the details for your request.
5. Click **Send**.

From the confirmation screen that appears, click **OK** if you are finished, or **Next** if you have another interview to schedule. Refer to Figure C-2 for a preview of an Interview request.

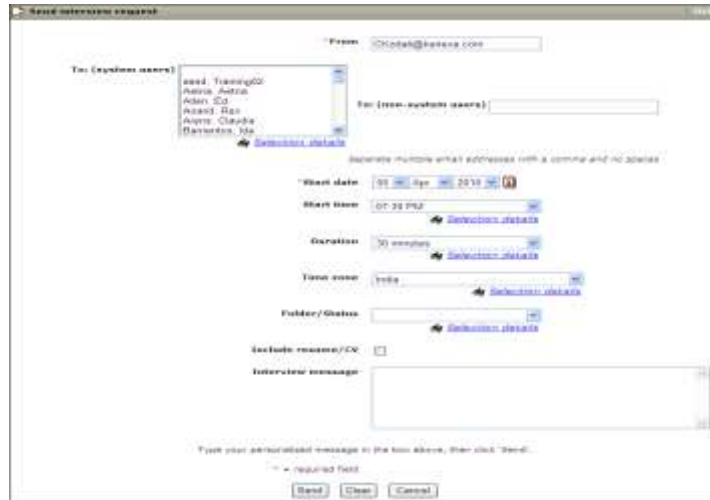


Figure C-1: Sending an Interview request

Interview requests can only be addressed to one person per request.

Responding to Interview Requests

Interviewers receive the Interview requests in their e-mail inboxes. Interviewers have the option of accepting or declining interview requests.

To respond to an Interview request:

1. Open the e-mail message, view the details of the interview and the resume/CV, if included.
2. Click the **Accept/Decline** link in the e-mail.
3. Enter a reply message, if applicable.
4. Click either **Accept interview** or **Decline interview**.
5. The action is confirmed and you have the opportunity to view your calendar, if desired.



Figure C-2: Interview request

When an interviewer responds to an Interview request, an e-mail is sent to the requester, including the Reply message, and the status of the Interview request is updated in *BrassRing*.

- **The Reply message is sent to the requester and is not recorded in *BrassRing*, it is sent back to the Sender's e-mail In-box**

Checking Interview Schedules

You can go into BrassRing any time and check on interview schedule for your active candidates, both confirmed appointments and requested. You can also check the Master schedule.

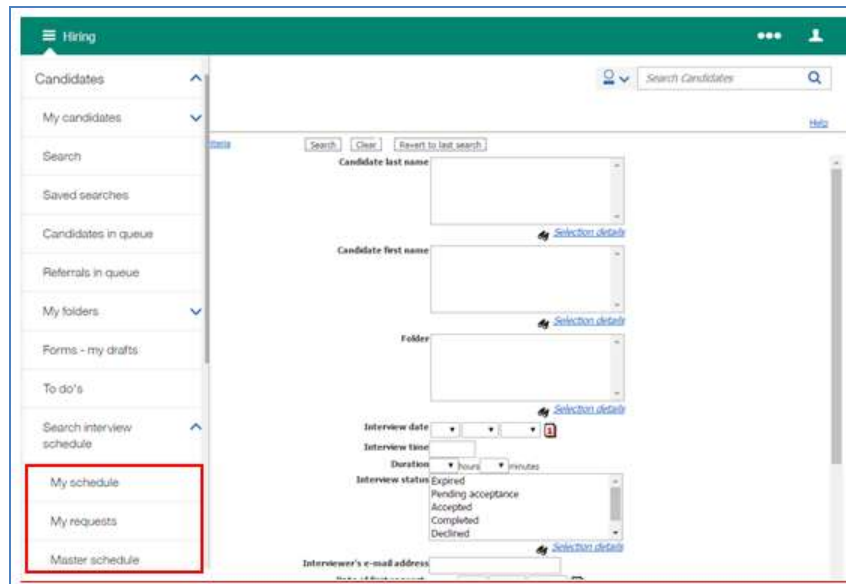


Figure C-3: Checking Interview Schedules

To check your requested interview schedule:

From **Hiring Navigation icon** , click **Candidates**, then select **Search interview schedule**, then select **My schedule**.

To check your confirmed interview schedule:

From **Hiring Navigation icon** , click **Candidates**, then select **Search interview schedule**, then select **My requests**.

To check your master interview schedule:

From **Hiring Navigation icon** , click **Candidates**, then select **Search interview schedule**, then select **Master schedule**.

Appendix D: Managing Talent Comparison Profiles

Appendix Overview:

A means of reviewing the upper slate of candidates you are considering is to run a Talent Comparison Summary. This allows you to compare information on up to five candidates in your folder. You can save criteria for up to 25 Talent comparison profiles, which you run at any time moving forward.

Objectives:

At the end of this appendix you will be able to:

- Run a Talent Comparison Summary.
- Add a Talent Comparison Profile.

Talent Comparison Summary

Run a Talent Comparison Summary

To run a Talent Comparison Summary:

1. From within a folder, select a minimum of two candidates to run the talent comparison summary.
2. Select **Talent Comparison** from the **Actions** menu. This launches the **Talent comparison profile administration** window.
3. Click the **Run** link for the **Talent comparison summary** you want to run.
4. The **Talent Comparison Summary** appears.
5. Select **email report** to share the summary with system users or non-system users (if applicable).
6. Select **Export to MS Excel** to save the report on your computer.

Adding a Talent Comparison Profile

In order to run a Talent Comparison summary, a Talent Comparison Profile must first be added.

To add a Talent Comparison Profile:

1. From within a folder, select a minimum of two candidates.
2. Select **Talent Comparison** from the **Actions** menu. This launches the **Talent comparison profile administration** window.
3. Click **Add new** via the **Actions** menu. This launches the **Add talent comparison profile** window.
4. In the **Profile name** field, enter a unique name for the profile.
5. Select up to ten fields in the **Available fields** list and click the **Add >>** button to move them to the **Selected fields** list. To select more than one field at once, press down the Ctrl key while selecting each field.
6. In the **Selected fields** list, use the up and down arrows to change the order of selected fields. The order in which fields appear in the box is the order in which they will appear in the report output.
7. Click **Save and run** to both save the profile and run the Talent comparison summary report now, using this profile. The data displays in a separate window. Click **Save** if you wish to

save the profile but not run it. The Talent comparison profile admin grid lists your newly-saved profile. See Figure D-1.

Select	Profile name	Run	View criteria	Edit profile	Delete
<input type="radio"/>	Comparing Educational History	Run			

Figure D- 1: Talent comparison profile page

- From the Actions menu>Talent comparison, the Talent comparison profile administration page, allows you to add, save as new, edit and delete your profiles.
- You may use Save as new to facilitate the creation of new Talent Comparison Summary profiles. Similar to saving a req as new, this action allows you to copy all the data from an existing profile, but be able to make any updates you like. Navigate to the Actions menu within a folder>Talent comparison profile administration>Save as new.
- Your company selected those form fields that you have available as comparison criteria within the Available fields list.

Check Your Skills Answer Key

Chapter 1

Getting Started

1. F
2. F
3. D

Chapter 2

Managing Reqs

1. F
2. F
3. D
4. E

Chapter 3

Talent Gateways

1. T
2. F
3. T
4. D
5. E

Chapter 4

Resume/CV Routing & Processing

1. F
2. F
3. T
4. F
5. You could either e-mail the resume/CV to your dedicated e-mail address, enter it through Add candidate, Add contact in *BrassRing*, or enter it through a Gateway if your company has them and if this is in alignment with your company's process.
6. Contact your Super User/System Administrator or other designated person, so they can create a source code for you.

Chapter 5

Screening Candidates

1. T
2. T
3. T
4. T

Chapter 6

Tracking Applicants

1. T
2. T
3. T
4. F
5. The date the eLink was sent, the sender of the eLink & the recipient of the eLink.

Chapter 7**Closing the Hiring Cycle**

1. T
2. F
3. F

Chapter 8**Getting Organized**

1. F
2. T
3. F
4. D
5. C

Chapter 9**Searching for Candidates**

1. T
2. T
3. T
4. F
5. T
6. F
7. F

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