



IBM Kenexa BrassRing on Cloud

Rules Automation Manager 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® BrassRing® on Cloud Rules Automation Manager Guide and to all subsequent releases and modifications until otherwise indication in new editions.

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Summary

This document contains material to guide a Workbench user on the creation and maintenance of Rules Automation Manager (RAM) triggers. RAM is very flexible and can solve, via automation, many business problems. It is important to take caution when creating, editing, and activating RAM triggers.

Customers with Power User access within Workbench can create RAM triggers in both Staging and Production environments, but can only activate them in Staging. To activate a Production RAM trigger, customers should reach out to their IBM representative. It is strongly recommended to test RAM triggers in your Staging environment first before creating and activating a RAM in the Production environment.

Terms

The following are common terms are used throughout this document.

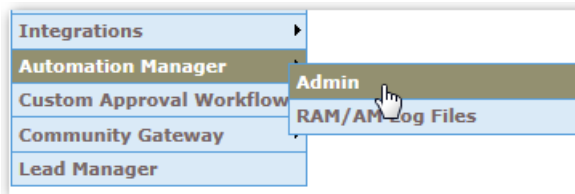
Term	Definition
Req in context	Meaning, the req that is associated with the trigger. For example, an HR status is updated for a candidate within a req. The req where this occurs is referred to as the <i>req in context</i> . Similarly, if a per req candidate form is added/updated for a candidate within a req the req where this occurs is referred to as the <i>req in context</i> .
Candidate in context	Meaning, the candidate that is associated with the trigger. For example, an HR status is updated for a candidate within a req. The candidate that this occurred for is referred to as the <i>candidate in context</i> .
Activate	To enable or turn-on your RAM trigger.
Inactivate	To disable or turn-off your RAM trigger.
Draft	RAM triggers will be placed in a draft status/mode each time they are created and/or edited.
Condition	Conditions evaluate data in the system to produce a true or false result.
Action	Actions perform automation in the system when the conditions are found to be true.
Rule	Rules are made of conditions and actions. The intention of creating rules is to allow for different logic to run in each rule, producing a different set of actions/results. Multiple rules can be configured per trigger.
Version	When editing a RAM trigger, versioning can be used. If a new version is created, the changes will only apply to reqs opened after the change was made active. This allows all candidates within a req to follow the same trigger logic.

Trigger Mechanism	Category that allows the Workbench user to define what triggers the RAM to run. Examples: HR Status and Candidate Form Insert.
Trigger Event	Defined by the Trigger Mechanism; the event will be the specific occurrence that dictates what will cause the trigger to run. Examples: Candidate Not Interested and Offer Form.
Trigger Delay	Define how the trigger is delayed and how long the delay will occur.

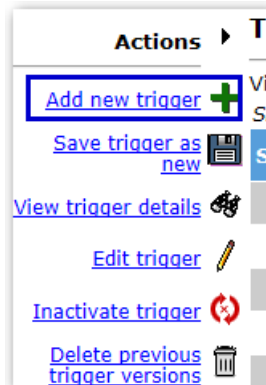
Creating and Activating a RAM Trigger

To create and activate a RAM trigger:

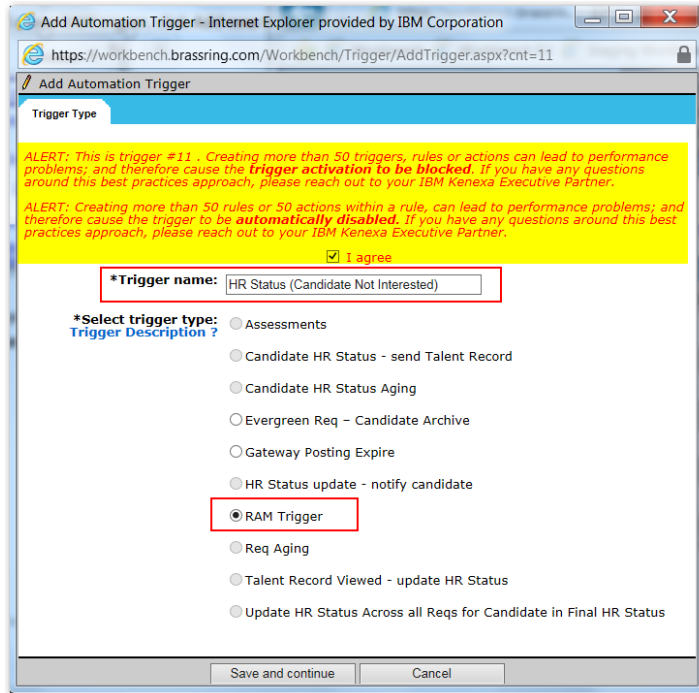
1. In Workbench > Tools > Automation Manager > Admin



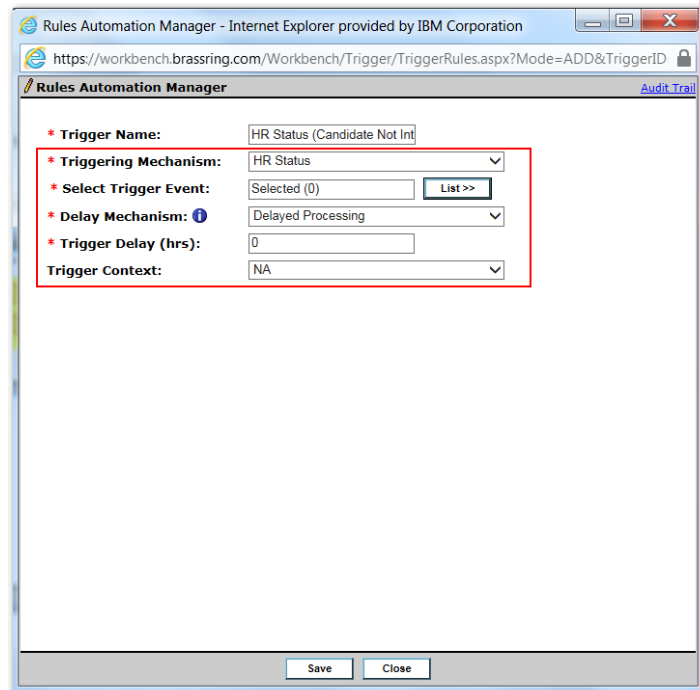
2. To add a new RAM trigger, click Add new trigger in the Actions list.



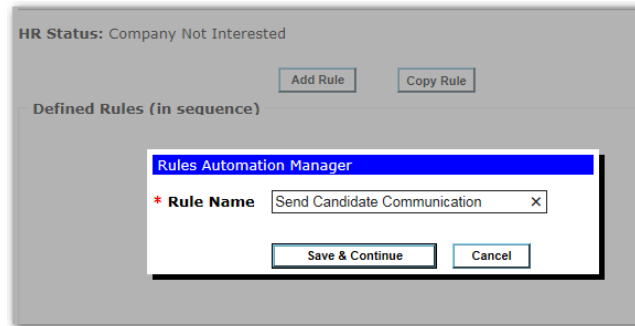
3. Name the RAM trigger. You may want to use a name that easily identifies the purpose of the trigger. Select RAM Trigger under the Select trigger type field. This will display a red alert message which will require you to click I agree. Click Save and Continue.



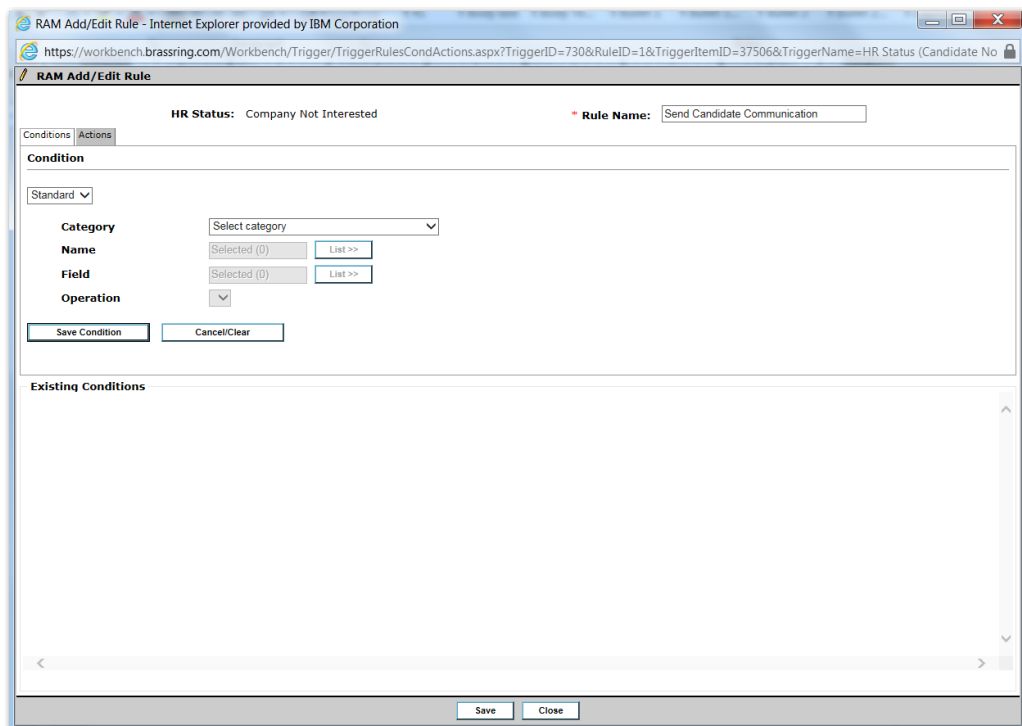
4. Fill out the Trigger Mechanism, Trigger Event, Delay Mechanism, Trigger Delay, and Trigger Context fields. (Additional information about these fields and options are included in this document.) Click Save.



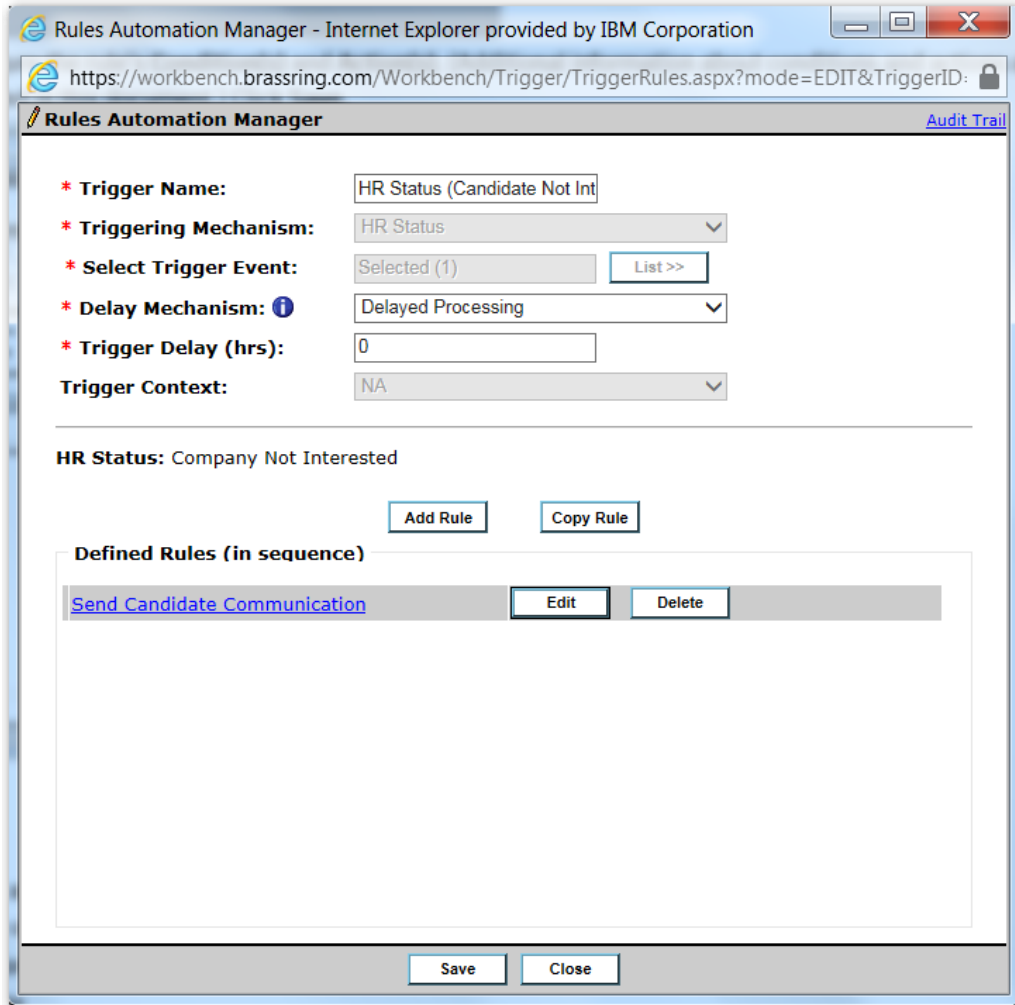
5. Click Add Rule. Name the rule and click Save & Continue. Here is an example of what the name of the Rule could consist of: Trigger Item (HR Status) – Condition (Candidate Type) – Action (Send Communication) as a result the Rule Title could be: Applied – Type = Internal – Send Thank You Email.



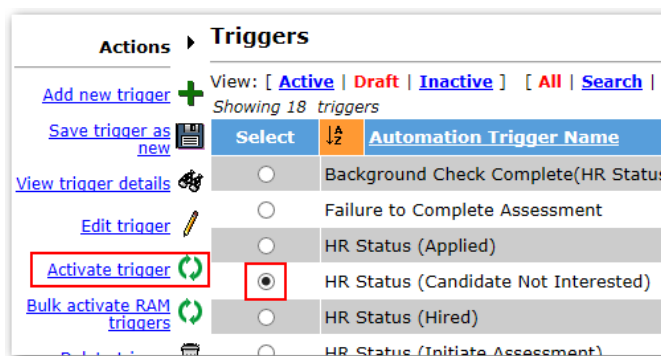
6. Configure the rule's Condition(s) and Action(s). (Additional information about conditions and actions are included in this document.) Click Save.



7. Additional Rules can be added if desired. Once all rules are added and sequenced appropriately, click Save.



- When created or edited, RAMs will be available in Draft status. Select the RAM trigger and click Activate trigger.



RAM Trigger Settings

Trigger Mechanism

You can consider the Trigger Mechanism as a Category that allows you to define what triggers the RAM to run.

There are many ways to trigger a RAM to run, such as through a candidate HR status update, various form actions, or req actions. The following list includes all available trigger mechanisms in RAM.



Note: Once one or more rules are created for the trigger, the Trigger Mechanism cannot be modified. In order to modify the trigger mechanism, you must delete all existing rules first.

Trigger Mechanism	Definition
Assessment Initiated	<p>When an assessment session is initiated. This can happen by:</p> <ul style="list-style-type: none"> • The candidate clicking on continue, via the Talent Gateway apply flow, after submitting to a job. • A BrassRing user clicking RUN assessment from within BrassRing. • A BrassRing user sending a communication/email to the candidate with a link to complete an assessment. <p>The trigger event field will allow you to pick one or more req templates. The Aging Delay Mechanism will be the only delay option available.</p>
Candidate Form Approval	When the candidate form is approved, the trigger will run.
Candidate Form Insert	When the candidate form is first created, the trigger will run.
Candidate Form Insert or Update	<ul style="list-style-type: none"> • When the candidate form is either first created OR updated at any time, the trigger will run. • This option cannot be used in conjunction with the individual form insert or form update for the same form.
Candidate Form Update	<ul style="list-style-type: none"> • When the candidate form is updated at any time, the trigger will run. • When using any form update, make sure that the form is not being updated too often. If multiple updates happen in a short period of time, use delay triggering to reduce the number of times the trigger runs. Example: If delay is setup to 1 day, multiple update during the same day will not trigger multiple triggers but only one per day.
Document Subsidiary Form Insert	When the document subsidiary form is first created, the trigger will run.
Document Subsidiary Form Insert or Update	<ul style="list-style-type: none"> • When the document subsidiary form is either first created OR updated at any time, the trigger will run.

	<ul style="list-style-type: none"> This option cannot be used in conjunction with the individual form insert or form update for the same form.
Document Subsidiary Form Update	When the document subsidiary form is updated at any time, the trigger will run.
HR Status	When the candidate gets updated to the selected HR status, the trigger will run.
HR Status Req Options	<ul style="list-style-type: none"> When one candidate gets updated to the HR status, the trigger runs and allows rules to be run on the entire req folder (all candidates within the req). This Trigger Mechanism should be used in conjunction with the Trigger Context of Run trigger across candidates. This is primarily used when dispositioning all candidates in a req when a candidate has been Hired. When using this trigger to disposition candidates, the client setting of RAM - Allow HR status update for closed reqs should be enabled. This ensures that all candidates meeting the condition(s) are dispositioned appropriately. Any HR status can be used for this trigger mechanism as well as the standard HR status trigger. RAM triggers using the HR Status trigger mechanism will always precede RAM triggers using the HR Status Req Options trigger mechanism. The req that triggered this is <u>excluded</u> from the Rules. To perform actions against the candidate that triggered it, utilize the HR Status trigger mechanism.
Job Post	<p>Triggers off of the action of Posting a job to the Talent Gateway.</p> <ul style="list-style-type: none"> The Trigger Event field displays all active req templates. Clients can select multiple req templates. The maximum number of req templates that can be selected is 10. The Delay Mechanism field allows the user to select from Delayed Triggering or Aging. Only req-based conditions and actions are available for this trigger mechanism. Batch posting is excluded.
Job Repost	Triggers whenever a req, from one of the configured templates, is reposted. "Reposted" is defined as posting a job to a BrassRing Talent Gateway after its removal date OR reposting a job to a BrassRing Talent

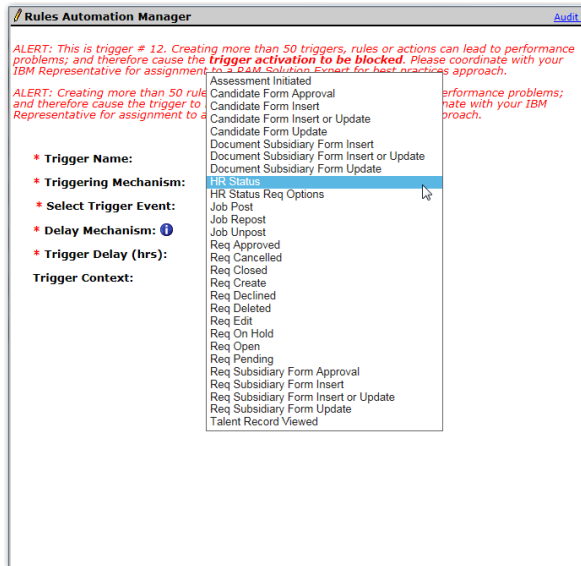
	<p>Gateway (that is select “Repost”) from the BrassRing Req Posting Options page.</p> <ul style="list-style-type: none"> • The Trigger Event field displays all active req templates. Clients can select multiple req templates. The maximum number of req templates that can be selected is 10. • The Delay Mechanism field allows the user to select from Delayed Triggering or Aging. • Only req-based conditions and actions are available for this trigger mechanism. • Batch posting is excluded.
Job Unpost	<ul style="list-style-type: none"> • When the job is unposted from any Talent Gateway (excluding external job boards), the trigger will run. • This is mainly to be used in conjunction with the Trigger Context of Run trigger across candidates, which has the effect of running the trigger for all candidates within the req. • If you want to target a specific Talent Gateway, then a Condition can be added to the Rule to determine whether the job is still posted on that specific Talent Gateway or not. • If the Trigger Context field is set to None, then only req data will be available for any Conditions and Actions within the trigger. • If the Trigger Context field is set to Run trigger across candidates, then all Condition and Action categories will be available. • When Trigger Delay is used, it will apply prior to unposting the job. 24 hour delay will run the trigger 24 hours before the unpost happens.
Lead Creation	<ul style="list-style-type: none"> • A sourcer files a lead to a campaign, and selects the status Lead added – notify sourcer. Based on this update, RAM sends a communication to the system user to inform them of the lead filed.
Lead Campaign Status	<ul style="list-style-type: none"> • A sourcer updates the lead to a specific Lead status. Based on this update, RAM sends communication to the system user or the sourcing team with details of Lead name, Campaign name, Previous Lead status, and Current Lead status.
Req Approved	<ul style="list-style-type: none"> • When a req is moved to the Approved status (meaning the final approver approves the req), the trigger will run. • This is mainly used to populate other req fields or send a communication.

	<ul style="list-style-type: none"> • If the Trigger Context field is set to None, then only req data will be available for Conditions and Actions within the trigger. • If the Trigger Context field is set to Run trigger across candidates, then all Condition and Action categories will be available.
Req Cancelled	<ul style="list-style-type: none"> • When a req is moved to a Cancelled status, the trigger will run. • This is mainly used to send a communication. • If the Trigger Context field is set to None, then only req data will be available for Conditions and Actions within the trigger. • If the Trigger Context field is set to Run trigger across candidates, then all Condition and Action categories will be available.
Req Closed	<ul style="list-style-type: none"> • When a req is moved to a Closed status, the trigger will run. • This is mainly used to send a communication. • If the Trigger Context field is set to None, then only req data is available for Conditions and Actions within the trigger. • If the Trigger Context field is set to Run trigger across candidates, then all Condition and Action categories will be available. • Note: Functionality is limited for what you can do with reqs and candidates when the req is in a closed status.
Req Create	<ul style="list-style-type: none"> • When a req is created and saved for the first time, the trigger will run. • This is mainly used to populate other req fields and/or to send a communication. • If the Trigger Context field is set to None, then only req data will be available for Conditions and Actions within the trigger. • If the Trigger Context field is set to Run trigger across candidates, then all Condition and Action categories are available.
Req Declined	<ul style="list-style-type: none"> • When a req is declined (meaning an approver declines approval and the req moves to a Declined status), the trigger will run. • This is mainly used to populate other req fields and/or to send a communication. • If the Trigger Context field is set to None, then only req data will be available for Conditions and Actions within the trigger.

	<ul style="list-style-type: none"> • If the Trigger Context field is set to Run trigger across candidates, then all Condition and Action categories will be available.
Req Deleted	<ul style="list-style-type: none"> • When a req is moved to the Deleted status, the trigger will run. • This is mainly used to send a communication. • If the Trigger Context field is set to None, then only req data will be available for Conditions and Actions within the trigger. • If the Trigger Context field is set to Run trigger across candidates, then all Condition and Action categories will be available.
Req Edit	<ul style="list-style-type: none"> • When a req is edited at any time, the trigger will run. • Req status updates are not considered an edit. • This trigger mechanism should be used with the condition field changes. Only changes made manually by users in BrassRing will be considered. • Updates completed thru integration will be ignored. If integrations are setup to update requisitions regularly, this trigger mechanism should not be used. • This is mainly used to populate other req fields and/or send a communication. • If the Trigger Context field is set to None, then only req data will be available for Conditions and Actions within the trigger. • If the Trigger Context field is set to Run trigger across candidates, then all Condition and Action categories will be available.
Req On Hold	<ul style="list-style-type: none"> • When a req is moved to an On Hold status, the trigger will run. • This is mainly used to send a communication. • If the Trigger Context field is set to None, then only req data will be available for Conditions and Actions within the trigger. • If the Trigger Context field is set to Run trigger across candidates, then all Condition and Action categories will be available.
Req Open	<ul style="list-style-type: none"> • When a req is moved to an Open status, the trigger will run. • This is mainly used to send a communication and/or used in req disbursement pull scenarios. • If the Trigger Context field is set to None, then only req data will be available for Conditions and Actions within the trigger.

	<ul style="list-style-type: none"> Do not select the Trigger Context field to Run trigger across candidates as there aren't any candidates when the trigger mechanism is req create, open, or approved.
Req Pending	When a req is moved to a Pending status, the trigger will run.
Req Subsidiary Form Approval	<ul style="list-style-type: none"> When a req sub form is approved, the trigger will run. If the Trigger Context field is set to None, then only req data will be available for Conditions and Actions within the trigger. If the Trigger Context field is set to Run trigger across candidates, then all Condition and Action categories will be available.
Req Subsidiary Form Insert	<ul style="list-style-type: none"> When a req sub form is first created, the trigger will run. If the Trigger Context field is set to None, then only req data will be available for Conditions and Actions within the trigger. If the Trigger Context field is set to Run trigger across candidates, then all Condition and Action categories will be available.
Req Subsidiary Form Insert or Update	<ul style="list-style-type: none"> When a req sub form is either first created OR updated at any time, the trigger will run. This option cannot be used in conjunction with the individual form insert or form update for the same form. If the Trigger Context field is set to None, then only req data will be available for Conditions and Actions within the trigger. If the Trigger Context field is set to Run trigger across candidates, then all Condition and Action categories will be available.
Req Subsidiary Form Update	<ul style="list-style-type: none"> When a req sub form is updated at any time, this trigger will run. If the Trigger Context field is set to None, then only req data will be available for Conditions and Actions within the trigger. If the Trigger Context field is set to Run trigger across candidates, then all Condition and Action categories will be available.
Talent Record Viewed	<p>Triggers each time a candidate's BrassRing Talent Record is viewed from within a req folder.</p> <ul style="list-style-type: none"> Trigger Event field displays all of the active req templates. Workbench Admins can select multiple req templates.

- The req must be in an Open or On hold status for the trigger to fire. This is an implicit check performed by RAM and does not require a condition to be built into the trigger.
- Delay Mechanisms that are supported by this trigger are: Delayed Triggering and Aging.



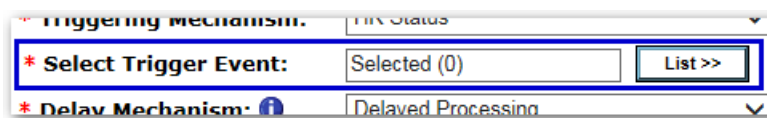
Trigger Event

The Trigger Event is defined by the selection of the Trigger Mechanism. The event will be the specific occurrence that dictates what will cause the trigger will run.




Notes:

- Only one RAM trigger is allowed per HR status and per Form (as long as the same combination of Delay Mechanism and Trigger Delay is not used). Different scenarios based on a single HR status or form should be handled within the rules themselves.
- Once one or more rules are created for the trigger, the Trigger Event cannot be modified. In order to modify the trigger mechanism, you must delete all existing rules first.



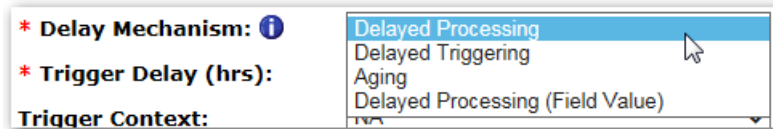
Delay Mechanism and Trigger Delay

The Delay Mechanism and Trigger Delay fields define how the trigger is delayed and how long the delay will occur.

 **Notes:** The delay selected/entered will be applied to the **entire** trigger and cannot be applied to only certain rules.

There are four types of Delay Mechanisms:

1. Delayed Processing
2. Delayed Triggering
3. Aging
4. Delayed Processing (Field Value)




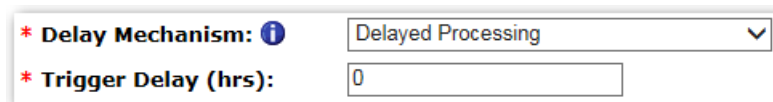
Delayed Processing

When the trigger event occurs (for example, a candidate’s HR Status is updated), if Delayed Processing has been selected, the RAM trigger will fire but then will be put on hold for the specified duration. After the delay has elapsed, the trigger will then run. At that time, the conditions are evaluated, and actions are performed if the conditions are met. If the delay is greater than or equal to 1 hour, Delayed Triggering or Aging should be used. Delayed Processing should only be used if there is no delay or if the delay is less than 1 hour. Delayed Processing triggers that have been fired cannot be stopped even if the trigger is inactivated. That is one of the reasons to use Delayed Triggering or Aging used instead.

Notes:

- The conditions are not evaluated and the actions are not taken until after the delay has occurred.
- Trigger Delay (hrs) value:
 - Will be the number of hours the trigger is delayed.
 - Decimal places are allowed. For example, if you want to delay the trigger 15 minutes, the value .25 should be entered.
 - **Maximum value allowed is 4560 (190 days).**

 *Trigger event occurs > trigger fires (looks at the mechanism and event) > delay elapses > trigger is executed - rules are run (without looking at the mechanism and event again)*




Delayed Triggering

When the trigger event occurs (for example, a candidate’s HR Status is updated), if Delayed Triggering has been selected, the RAM trigger will wait the time defined in the delay and then fire and run the trigger. Thus, the trigger will be fired and executed at the same time.

Notes:

- Trigger Delay (hrs) value:
 - Will be the number of hours the trigger is delayed.
 - Will accept only whole numeric values. Decimals are not accepted meaning that the minimum delay with Delayed Trigger is 1 hour.
- You may want to use this delay mechanism when you would like the system to check if the overall trigger event is the same as it was before the delay period.

 *Trigger event occurs > delay elapses > trigger fires (looks at mechanism and event) > trigger is executed - rules are run*

* Delay Mechanism: ⓘ	Delayed Triggering ▼
* Trigger Delay (hrs):	0

Aging

When the trigger event occurs (for example, a candidate’s HR Status is updated), if Aging has been selected, the RAM trigger will check if the HR Status is the same after the delay period has elapsed. If the status did not change, the trigger is fired and executed.

The Delay Mechanism of Aging is typically used for reminder triggers. Example: If candidate is still in pending assessment, after 3 days, sent a reminder notification.

Notes:

- Trigger Delay (hrs) value:
 - Will be the number of hours the trigger is delayed.
 - Will accept only whole numeric values. Decimals are not accepted meaning that the minimum delay with Delayed Trigger is 1 hour.
- It’s recommended to use Aging when you want to trigger actions based on a Requisition or HR Status ages.
- If a Req Status change or HR Status change has occurred and the trigger delay type is Aging, the RAM will check to see if that Req Status or HR Status is the same after the delay period has elapsed. If the status does not change, the trigger will be fired and executed.
- This Delay Mechanism is comparable to the old Candidate HR Status Aging and Req Aging Automation Manager triggers.

* Delay Mechanism: ⓘ	Aging ▼
* Trigger Delay (hrs):	1

Delayed Processing (Field Value)

When the trigger event occurs (for example, a candidate’s HR Status is updated), if Delayed Processing (Field Value) has been selected, the RAM trigger will fire but then will be put on hold for the specified duration. After the delay has elapsed (defined by the Delay Field selected in the trigger), the trigger will then run. At that time, the conditions are evaluated, and actions are performed if the conditions are met.

Notes:

- Delay Field value:
 - In this field, you can choose to delay the trigger based on a Candidate form field, a Req form field, or a Req sub form field.
 - Only Numeric or Single-Select field types can be used.
 - Field types that are not selectable: Query-select, radio, check box, text, text area, multi select, date, email address, label, SSN, and autofill.)



- Delayed Processing (Field Value) will function the same as the Delayed Processing type, that is the RAM trigger is fired and it will be processed after the delay has elapsed.
- This delay mechanism allows the client’s users to define the delay period. For example, if the client would like their BrassRing users to define how long they would like to delay a disposition email, they can select it from a single-select, or numeric field on the disposition candidate form.

The following table details which delay mechanisms are available for each Triggering Mechanism.

Triggering Mechanism	Delay Mechanisms Available
Assessment Initiated	Aging
Candidate Form Insert	Delayed Processing, Delayed Triggering
Candidate Form Approval	Delayed Processing
Candidate Form Update	Delayed Processing, Delayed Triggering
Candidate Form Insert or Update	Delayed Processing, Delayed Triggering
Document Subsidiary Form Insert	Delayed Processing
Document Subsidiary Form Update	Delayed Processing
Document Subsidiary Form Insert or Update	Delayed Processing
HR Status	Delayed Processing, Delayed Triggering, Aging, Delayed Processing (Field Value)
HR Status Req Options	Delayed Processing, Delayed Triggering, Aging, Delayed Processing (Field Value)
Job Post	Delayed Triggering, Aging
Job Repost	Delayed Triggering, Aging
Job Unpost	Delayed Processing
Req Create	Delayed Processing
Req Approved	Delayed Processing, Delayed Triggering, Aging
Req Open	Delayed Processing, Delayed Triggering, Aging
Req Edit	Delayed Processing
Req On Hold	Delayed Processing, Delayed Triggering, Aging
Req Declined	Delayed Processing, Delayed Triggering, Aging
Req Closed	Delayed Processing, Delayed Triggering, Aging

Req Deleted	Delayed Processing, Delayed Triggering, Aging
Req Cancelled	Delayed Processing, Delayed Triggering, Aging
Req Pending	Delayed Processing, Aging
Req Subsidiary Form Approval	Delayed Processing
Req Subsidiary Form Insert	Delayed Processing, Delayed Triggering
Req Subsidiary Form Insert or Update	Delayed Processing, Delayed Triggering
Req Subsidiary Form Update	Delayed Processing, Delayed Triggering
Talent Record Viewed	Delayed Triggering, Aging

Trigger Context

The Trigger Context extends the scope of the trigger. Once one or more rules are created for a trigger, the Trigger Context cannot be modified. To modify the Trigger Context, all rules must be deleted. There are four Trigger Context options.

1. None/NA

- This option means that a Trigger Context is either not available for the Trigger Mechanism used, or the scope of the trigger does not need to be expanded beyond the simple trigger mechanism that occurred.
- For example, if Req Edit is selected as the Trigger Mechanism, and the goal is simply to send a communication to the Manager on the req, then no additional Trigger Context is needed, since the conditions and actions only need req data. No candidate actions are needed.

Trigger Context:

Trigger Context:

2. Run Trigger Across Reqs

- This option is available to handle circumstances when a single per candidate or multiple per candidate form is selected as the Trigger Event. When these types of forms are selected, a req is not in context. Therefore, req related conditions and actions cannot be used.
- In the case where req data is still needed, this setting runs the trigger across all reqs that the candidate is filed to in order to get req context. This may result in multiple actions being taken and produce undesirable results.
- For example, when you configure an action to send communication when a single/candidate form is created and this setting is used, a communication is sent out for each req the candidate is in. If the candidate is currently in three reqs, then three communications are sent.
- In most cases, this setting should not be used. Furthermore, this setting is disabled if the Trigger Event is not a single per candidate or multiple per candidate form. If you use this context, make sure to setup a limit on the number of times a candidate can apply to reqs.

Trigger Context:

3. Run Trigger Across Candidates

- This option is available to handle triggers where the trigger should be run across all candidates within the req. A common example is dispositioning of all candidates all candidates in a req that haven't been dispositioned already, after a candidate has been hired. It is used in conjunction with the Trigger Mechanism of HR Status Req Options, Job Unpost, Req Create, Req Edit, and Req Subsidiary Form Approval/Insert/Update. If using evergreen reqs, make sure the trigger will not run on these reqs to avoid any negative impact on the system.

Trigger Context: Run trigger across candidates

4. Run Trigger to Pull Candidates

- This option is available only for the trigger mechanism of Req Open and is strictly used in Evergreen req scenarios to pull candidates from Evergreen reqs.
- RAM will only pull the first 1000 candidates found. These types of triggers should only be setup by IBM representative.

Trigger Context: Run trigger to pull candidates

Creating Rules

Rules are made of conditions and actions. The intention of creating rules is to allow for different logic to run in each rule, producing a different set of actions/results.

You should not add more than 50 rules or actions to any trigger. Doing so has the potential to cause performance problems, and therefore cause the trigger to be automatically disabled.

Click the Add Rule button to add a new rule to the trigger.

The screenshot shows the 'Rules Automation Manager' window. The configuration includes:

- Trigger Name:** HR Status (Hired)
- Triggering Mechanism:** HR Status
- Select Trigger Event:** Selected (1) with a 'List >>' button.
- Delay Mechanism:** Delayed Processing
- Trigger Delay (hrs):** 0
- Trigger Context:** NA

Below the configuration, the current trigger status is 'HR Status: Hired'. There are 'Add Rule' and 'Copy Rule' buttons. A section for 'Defined Rules (in sequence)' is currently empty. At the bottom, there are 'Save' and 'Close' buttons.

Existing configured rules are displayed by row in the Defined Rules section. Each rule can be edited (by clicking the Edit button) or deleted (by clicking the Delete button) if needed. The name of the rule is hyperlinked to allow the user to view the rule.



Sequencing Rules

Rules run in the sequence shown on the screen. Depending on the logic needed within the trigger, the sequencing may or may not be important. In most cases, however, the order is important to produce the business logic desired within the trigger. To change the order in which the rules run, use the black positioning arrows on the screen to move the rules up or down in the sequence.



Should a rule execute an EXIT action, such as an HR Status update, the entire trigger exits and no additional rules will run. [\(Additional information on EXIT actions can be found on page 34.\)](#) Keep this in mind while configuring and sequencing rules.

Conditions

A rule is composed of conditions and actions. Conditions evaluate data in the system to produce a true or false result. Actions perform automated tasks in the system when those conditions are true.

When clicking to add a rule or edit an existing rule, the following screen displays. The Conditions tab displays by default.

Category

To create a new condition, first select a Category. There are many condition categories to choose from. Selection of the category further refines additional selections needed to specify the condition. Keep in mind that the list of categories that are available may change depending on the Trigger Mechanism and Trigger Context selected for the trigger. In cases where there is no candidate in context, all candidate conditions will be hidden. In cases where there is no req in context, all req conditions will be hidden. The available categories and typical uses are as follows.

- Campaign Fields

Field	Notes	
Category	Campaign fields	
Name	n/a	
Field	List of Campaign fields appears.	
Operation	Available Operations for 'Date' options above: <ul style="list-style-type: none"> ▪ Equals ▪ Not Equals ▪ Greater Than ▪ Less Than ▪ Less Than (# days) ▪ Greater Than (# days) ▪ Is Blank ▪ Is Not Blank Available Operations for 'User' options above: <ul style="list-style-type: none"> • Equals • Not Equals • Is Blank Is Not Blank	Available Operations for Text, Text Area fields: <ul style="list-style-type: none"> • Contains • Not Contains • Equals • Not Equals • Is Blank • Is Not Blank Available Operations for Numeric fields: <ul style="list-style-type: none"> • Equals • Not Equals • Greater Than • Less Than • Is Blank • Is Not Blank
Value	Value section is dependent on the type of field and Operation selected.	

- Candidate Filing

Field	Notes
Category	Candidate Filing
Name	n/a
Field	Available Options: <ul style="list-style-type: none"> ▪ Date when filed to current req

	<ul style="list-style-type: none"> ▪ Date when filed to first req ▪ Date when filed to most recent req ▪ User who filed to current req ▪ User who filed to first req ▪ User who filed to most recent req 	
Operation	Available Operations for 'Date' options above: <ul style="list-style-type: none"> ▪ Equals ▪ Not Equals ▪ Greater Than ▪ Less Than ▪ Less Than (# days) ▪ Greater Than (# days) ▪ Is Blank ▪ Is Not Blank 	Available Operations for 'User' options above: <ul style="list-style-type: none"> • Equals • Not Equals • Is Blank • Is Not Blank
Value	User can Define a value (date format: MM/DD/YYYY) or use Compare value	

▪ Candidate forms

Field	Notes	
Category	Candidate forms	
Name	Includes a list of candidate forms.	
Field	Includes a list of fields on the candidate form selected above.	
Operation	Available Operations for Single-select, Multi-select, Check box, Radio button fields: <ul style="list-style-type: none"> • Equals • Not Equals • Is Blank • Is Not Blank Available Operations for Date fields: <ul style="list-style-type: none"> • Equals • Not Equals • Greater Than • Less Than • Less Than (# days) • Greater Than (# days) • Is Blank • Is Not Blank Available Operations for Email fields: <ul style="list-style-type: none"> • Contains • Not Contains • Is Blank • Is Not Blank 	Available Operations for Text, Text Area fields: <ul style="list-style-type: none"> • Contains • Not Contains • Equals • Not Equals • Is Blank • Is Not Blank Available Operations for Numeric fields: <ul style="list-style-type: none"> • Equals • Not Equals • Greater Than • Less Than • Is Blank • Is Not Blank Operations available for Autofill fields are dependent on the field type that is being used in the autofill. SSN and Label field types are not selectable in the Candidate form category.
Value	Value section is dependent on the type of field selected. (Select value(s), Compare value, Define value)	

○ Additional Notes:

- Allows the rule to evaluate information entered in candidate form fields.

▪ Candidate proximity

Field	Notes
Category	Candidate proximity
Name	n/a
Field	n/a
Operation	<ul style="list-style-type: none"> • Within • Not Within
Value	User can Define distance in Miles or Kilometers. (Example: Within 50 miles, then perform an action.)

- Additional Notes:
 - Evaluates the candidate’s proximity to the req.
 - Compares the candidate’s Zip/Postal Code or City (on their Talent Record) with the proximity defined on the Req (Zip/Postal Code or City).

▪ Candidate tier visible

Field	Notes
Category	Candidate tier visible
Name	n/a
Field	n/a
Operation	n/a
Value	Clicking the Select value(s) button presents two options Yes and No. (Example: Yes, the candidate is in a tier visible for a req, or No, the candidate is not in a tier visible for a req.)

- Additional Notes:
 - This condition category is hidden when the trigger does not have req context.

▪ Count # Candidates in HR status for this req

Field	Notes
Category	Count # Candidates in HR status for this req
Name	HR Statuses listed for selection (Multiple HR Statuses can be selected)
Field	n/a
Operation	<ul style="list-style-type: none"> • Equals • Not Equals • Greater Than • Less Than
Value	User can ‘Define value’ or use the ‘Compare value’ option.

- Additional Notes:
 - Gives a count of the number of candidates at the specified HR status at the time the trigger runs.
 - Uses the req that is in context for this event.
 - For example, if this req has less than 10 candidates at this status, then perform an action.

▪ Count # active reqs the candidate is in

Field	Notes
Category	Count # active reqs candidate is in
Name	n/a
Field	n/a
Operation	<ul style="list-style-type: none"> • Equals • Not Equals • Greater Than • Less Than
Value	User can ‘Define value’ or use the ‘Compare value’ option.

- Additional Notes:
 - Counts the number of reqs the candidate is in.
 - Does not include final statuses.

Document subsidiary form fields

Field	Notes	
Category	Document subsidiary form fields	
Name	Includes a list of doc sub forms.	
Field	Includes a list of fields on the doc sub form selected above.	
Operation	<p>Available Operations for Single-select, Multi-select, Check box, Radio button fields:</p> <ul style="list-style-type: none"> • Equals • Not Equals • Is Blank • Is Not Blank <p>Available Operations for Date fields:</p> <ul style="list-style-type: none"> • Equals • Not Equals • Greater Than • Less Than • Less Than (# days) • Greater Than (# days) • Is Blank • Is Not Blank <p>Available Operations for Email fields:</p> <ul style="list-style-type: none"> • Contains • Not Contains • Is Blank • Is Not Blank 	<p>Available Operations for Text, Text Area fields:</p> <ul style="list-style-type: none"> • Contains • Not Contains • Equals • Not Equals • Is Blank • Is Not Blank <p>Available Operations for Numeric fields:</p> <ul style="list-style-type: none"> • Equals • Not Equals • Greater Than • Less Than • Is Blank • Is Not Blank <p>Operations available for Autofill fields are dependent on the field type that is being used in the autofill. SSN and Label field types are not selectable in the Candidate form category.</p>
Value	Value section is dependent on the type of field selected. (Select value(s), Compare value, Define value)	

Additional Notes:

- Allows the rule to evaluate information entered in document subsidiary (doc sub) form fields.

Form existence

Field	Notes
Category	Form existence
Name	Includes a list of active candidate forms.
Field	n/a
Operation	<ul style="list-style-type: none"> • Is True • Is Not True
Value	n/a
Standard Form Existence	<p>Select the form multiples (in order to look an any version of the form in the req or across reqs:</p> <ul style="list-style-type: none"> - Match any form versions for this req - Match any form versions across reqs

Additional Notes:

- Evaluates whether a candidate form exists or does not exist on the candidate’s Talent Record.
- If the form selected is a single per candidate per req form, then the req in context is used to determine if this form exists for this req.

HR status

Field	Notes
Category	HR status
Name	n/a

Field	n/a
Operation	n/a
Value	User is allowed to select the HR status(es) to include in the condition.

- Additional Notes:
 - This can be used to determine if the candidate is presently at that status when the trigger runs. Example: Candidate is currently in the “Applied” status.

▪ Lead Campaign fields

Field	Notes	
Category	Lead Campaign fields	
Name	n/a	
Field	<ul style="list-style-type: none"> • Lead Campaign status • Lead filing date 	
Operation	Available Operations for Lead Campaign status: <ul style="list-style-type: none"> • Equals • Not Equals • Is Blank • Is Not Blank 	Available Operations for lead filing date: <ul style="list-style-type: none"> • Equals • Not Equals • Greater Than • Less Than • Less Than (# days) • Greater Than (# days) • Is Blank • Is Not Blank
Value	Value section is dependent on the type field and Operation selected.	

▪ Lead fields

Field	Notes
Category	Lead fields
Name	n/a
Field	Created On
Operation	<ul style="list-style-type: none"> • Equals • Not Equals • Greater Than • Less Than • Less Than (# days) • Greater Than (# days) • Is Blank • Is Not Blank
Value	Value section is dependent on the type field and Operation selected.

▪ Link to previous rules

Field	Notes
Category	Link to previous rules
Name	Lists other rules within the same trigger that precedes the rule you are creating/editing.
Field	n/a
Operation	<ul style="list-style-type: none"> • Is True • Is No True
Value	n/a

- Additional Notes:
 - You can only link to a previous rule for true or false.
 - If you reorder the rules, you need to make sure that conditions are changed.
 - Allows linking this rule to previous rule.

- Used in rule branching scenarios. Example: rule 2 only runs when rule 1 conditions are true.

- **Positions filled**

Field	Notes
Category	Positions filled
Name	n/a
Field	n/a
Operation	n/a
Value	n/a

- **Additional Notes:**

- This is only available when the trigger mechanism is HR Status Req Options.
 - When this condition is used, it determines if the positions for the req have been filled (# remaining positions = 0) when the candidate in context gets to the selected HR status. The condition takes into account the candidate in context.

- **Req form fields**

Field	Notes		
Category	Req form fields		
Name	Includes a list of all active req forms		
Field	Includes a list of fields on the req form selected above.		
Operation	<table border="0" style="width: 100%;"> <tr> <td style="width: 50%; vertical-align: top;"> <p>Available Operations for Single-select, Multi-select, Check box, Radio button fields:</p> <ul style="list-style-type: none"> • Equals • Not Equals • Is Blank • Is Not Blank <p>Available Operations for Date fields:</p> <ul style="list-style-type: none"> • Equals • Not Equals • Greater Than • Less Than • Less Than (# days) • Greater Than (# days) • Is Blank • Is Not Blank <p>Available Operations for Email fields:</p> <ul style="list-style-type: none"> • Contains • Not Contains • Is Blank • Is Not Blank </td> <td style="width: 50%; vertical-align: top;"> <p>Available Operations for Text, Text Area fields:</p> <ul style="list-style-type: none"> • Contains • Not Contains • Equals • Not Equals • Is Blank • Is Not Blank <p>Available Operations for Numeric fields:</p> <ul style="list-style-type: none"> • Equals • Not Equals • Greater Than • Less Than • Is Blank • Is Not Blank <p>Operations available for Autofill fields are dependent on the field type that is being used in the autofill. Label field types are not selectable in the Candidate form category.</p> </td> </tr> </table>	<p>Available Operations for Single-select, Multi-select, Check box, Radio button fields:</p> <ul style="list-style-type: none"> • Equals • Not Equals • Is Blank • Is Not Blank <p>Available Operations for Date fields:</p> <ul style="list-style-type: none"> • Equals • Not Equals • Greater Than • Less Than • Less Than (# days) • Greater Than (# days) • Is Blank • Is Not Blank <p>Available Operations for Email fields:</p> <ul style="list-style-type: none"> • Contains • Not Contains • Is Blank • Is Not Blank 	<p>Available Operations for Text, Text Area fields:</p> <ul style="list-style-type: none"> • Contains • Not Contains • Equals • Not Equals • Is Blank • Is Not Blank <p>Available Operations for Numeric fields:</p> <ul style="list-style-type: none"> • Equals • Not Equals • Greater Than • Less Than • Is Blank • Is Not Blank <p>Operations available for Autofill fields are dependent on the field type that is being used in the autofill. Label field types are not selectable in the Candidate form category.</p>
<p>Available Operations for Single-select, Multi-select, Check box, Radio button fields:</p> <ul style="list-style-type: none"> • Equals • Not Equals • Is Blank • Is Not Blank <p>Available Operations for Date fields:</p> <ul style="list-style-type: none"> • Equals • Not Equals • Greater Than • Less Than • Less Than (# days) • Greater Than (# days) • Is Blank • Is Not Blank <p>Available Operations for Email fields:</p> <ul style="list-style-type: none"> • Contains • Not Contains • Is Blank • Is Not Blank 	<p>Available Operations for Text, Text Area fields:</p> <ul style="list-style-type: none"> • Contains • Not Contains • Equals • Not Equals • Is Blank • Is Not Blank <p>Available Operations for Numeric fields:</p> <ul style="list-style-type: none"> • Equals • Not Equals • Greater Than • Less Than • Is Blank • Is Not Blank <p>Operations available for Autofill fields are dependent on the field type that is being used in the autofill. Label field types are not selectable in the Candidate form category.</p>		
Value	Value section is dependent on the type of field selected. (Select value(s), Compare value, Define value)		

- **Req form fields modified**

Field	Notes
Category	Req form fields modified
Name	n/a
Field	n/a
Operation	Has Changed
Value	Includes a list of req fields.

- Additional Notes:
 - This category allows the selection of req fields to identify whether those fields have changed.
 - Typically used with the trigger mechanism of Req Edit.
 - Available on other triggering mechanisms but with a restricted list of req fields.
 - When using the Send Communication action with this category, the checkbox (on the Send Communication action page), Include old and new values for req form fields modified, will be available.

▪ Req status

Field	Notes
Category	Req status
Name	n/a
Field	n/a
Operation	<ul style="list-style-type: none"> ▪ Equals ▪ Not Equals ▪ Is Blank ▪ Is Not Blank
Value	Includes a list of all req statuses except Pending and Deleted.

- Additional Notes:
 - This selection does not trigger the RAM to run. It only evaluates the req status based on some other event that has been triggered.
 - This category is only available when the trigger has a req in context.

▪ Req subsidiary form fields

Field	Notes	
Category	Req subsidiary form fields	
Name	Includes a list of all active req subsidiary forms	
Field	Includes a list of fields on the req subsidiary form selected above.	
Operation	Available Operations for Single-select, Multi-select, Check box, Radio button fields: <ul style="list-style-type: none"> • Equals • Not Equals • Is Blank • Is Not Blank Available Operations for Date fields: <ul style="list-style-type: none"> • Equals • Not Equals • Greater Than • Less Than • Less Than (# days) • Greater Than (# days) • Is Blank • Is Not Blank Available Operations for Email fields: <ul style="list-style-type: none"> • Contains • Not Contains • Is Blank • Is Not Blank 	Available Operations for Text, Text Area fields: <ul style="list-style-type: none"> • Contains • Not Contains • Equals • Not Equals • Is Blank • Is Not Blank Available Operations for Numeric fields: <ul style="list-style-type: none"> • Equals • Not Equals • Greater Than • Less Than • Is Blank • Is Not Blank Operations available for Autofill fields are dependent on the field type that is being used in the autofill. Label field types are not selectable in the Candidate form category.
Value	Value section is dependent on the type of field selected. (Select value(s), Compare value, Define value)	

▪ Req templates

Field	Notes
Category	Req templates
Name	n/a
Field	n/a
Operation	n/a
Value	Includes a list of all req templates/forms.

▪ Talent Gateways

Field	Notes
Category	Talent Gateways
Name	Includes a list of all Global Talent Gateways and Talent Gateways.
Field	<ul style="list-style-type: none"> ▪ Currently Posted ▪ Posted Date ▪ Removal Date
Operation	<p>Available Operations for “Currently Posted”:</p> <ul style="list-style-type: none"> ▪ Is True ▪ Is Not True <p>Available Operations for “Posted Date” and “Removal Date”:</p> <ul style="list-style-type: none"> ▪ Equals ▪ Not Equals ▪ Greater Than ▪ Less Than ▪ Less Than (# days) ▪ Greater Than (# days) ▪ Is Blank ▪ Is Not Blank
Value	No Value available when selecting “Currently Posted”. Selecting “Posted Date” or “Removal Date” allows the user to Define value, or Compare value.

○ Additional Notes:

- If selected, the system will evaluate data associated with req postings. For example, job is not posted.

▪ Talent Record

Field	Notes		
Category	Talent Record		
Name	n/a		
Field	<table border="0" style="width: 100%;"> <tr> <td style="width: 50%; vertical-align: top;"> <p>Includes the below fields from the Applicant Master (fields found on the candidate profile):</p> <ul style="list-style-type: none"> ▪ Address 1 ▪ Address 2 ▪ Candidate Added On ▪ Candidate ref num ▪ Candidate Stacking Field ▪ Candidate type current type ▪ Candidate type previous ▪ City ▪ Country ▪ Date last loaded ▪ Degree ▪ Email </td> <td style="width: 50%; vertical-align: top;"> <ul style="list-style-type: none"> ▪ Educational institute ▪ Employer ▪ Fax number ▪ Field of study ▪ First name ▪ First name pronunciation key ▪ Location ▪ Middle name ▪ Other phone ▪ Position held ▪ Work phone ▪ Years Experience ▪ Zip/postal code </td> </tr> </table>	<p>Includes the below fields from the Applicant Master (fields found on the candidate profile):</p> <ul style="list-style-type: none"> ▪ Address 1 ▪ Address 2 ▪ Candidate Added On ▪ Candidate ref num ▪ Candidate Stacking Field ▪ Candidate type current type ▪ Candidate type previous ▪ City ▪ Country ▪ Date last loaded ▪ Degree ▪ Email 	<ul style="list-style-type: none"> ▪ Educational institute ▪ Employer ▪ Fax number ▪ Field of study ▪ First name ▪ First name pronunciation key ▪ Location ▪ Middle name ▪ Other phone ▪ Position held ▪ Work phone ▪ Years Experience ▪ Zip/postal code
<p>Includes the below fields from the Applicant Master (fields found on the candidate profile):</p> <ul style="list-style-type: none"> ▪ Address 1 ▪ Address 2 ▪ Candidate Added On ▪ Candidate ref num ▪ Candidate Stacking Field ▪ Candidate type current type ▪ Candidate type previous ▪ City ▪ Country ▪ Date last loaded ▪ Degree ▪ Email 	<ul style="list-style-type: none"> ▪ Educational institute ▪ Employer ▪ Fax number ▪ Field of study ▪ First name ▪ First name pronunciation key ▪ Location ▪ Middle name ▪ Other phone ▪ Position held ▪ Work phone ▪ Years Experience ▪ Zip/postal code 		
Operation	Option section is dependent on the type of field selected.		
Value	Value section is dependent on the type of field selected. (Select value(s), Compare value, Define value)		

Name

The Name selection is presented when the category is selected (if applicable). Please reference the tables in the Category section above to see if a name will be available for the Category selected.

The screenshot shows a form with two rows. The first row is labeled 'Category' and has a dropdown menu with 'Candidate forms' selected. The second row is labeled 'Name' and has a text box containing 'Selected (0)' and a button labeled 'List >>'.

Field

The Field selection is presented when the Name is selected (if applicable). Please reference the tables in the Category section above to see if a field will be available for the Category selected.

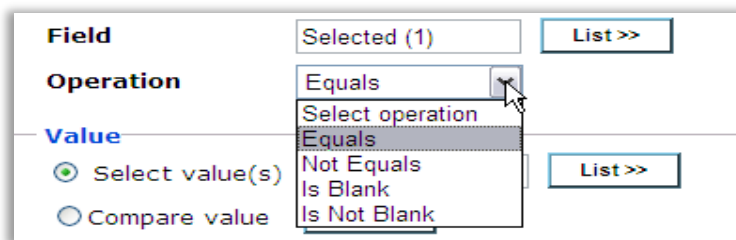
The screenshot shows a form with three rows. The first row is labeled 'Category' and has a dropdown menu with 'Candidate forms' selected. The second row is labeled 'Name' and has a text box containing 'Selected (1)' and a button labeled 'List >>'. The third row is labeled 'Field' and has a text box containing 'Selected (0)' and a button labeled 'List >>'.

Operation

The Operation selection is presented when the Field is selected (if applicable). Operations determine how to evaluate the field or category selected. The available operations are dependent on the field type selected. The following is a list of operations based on field type.

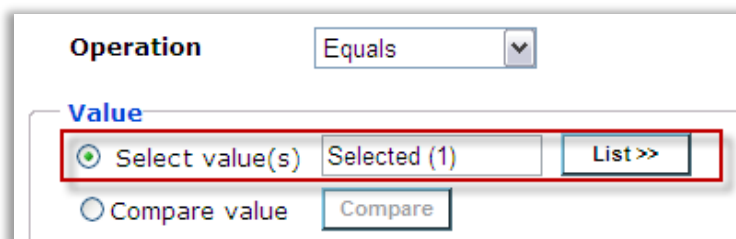
- Single select, Multi select, Query select, Radio button, Checkbox fields
 - Equals
 - Not Equals
 - Is Blank
 - Is Not Blank
- Date
 - Equals
 - Not Equals
 - Greater Than
 - Less Than
 - Is Blank
 - Is Not Blank
 - Greater Than (# days)
 - Using this operation takes the Define Value input for this condition and adds it to today's date, producing Date X. The date field selected (say Date Y) here is then compared to Date X. If Date Y is greater than Date X, then this condition is true.
 - Negative values can be input into the Define Value box.
 - Within scenario – use Greater Than (# days) with negative value.

- Less Than (# days)
 - Using this operation takes the Define Value input for this condition and adds it to today’s date, producing Date X. The date field selected (say Date Y) here is then compared to Date X. If Date Y is less than Date X, then this condition is true.
 - Negative values can be input into the Define Value box.
 - Not Within scenario – use Less Than (# days) with negative value.
 - If date on the form being considered is an actual expiration date – use Less Than (# days) with 0.
- Numeric
 - Equals
 - Not Equals
 - Greater Than
 - Less Than
 - Is Blank
 - Is Not Blank
- Text
 - Contains
 - Not Contains
 - Is Blank
 - Is Not Blank
 - Equals
 - Not Equals



Select Values

When the field or category selected has a finite list of options to choose from (that is single select), then the Select value(s) option is available. This allows selection of the specific value to evaluate. It is evaluated based on the operation selected.



Compare value

When the field or category selected is available to be compared, then the Compare value option is shown in addition to the Select value(s) option. This allows comparing this field to another field. When you use this option, it allows selecting the second field to be used in the comparison. The comparison logic uses the Operation defined.

- Date and Numeric field types can only be compared to fields of the same type. All other field types can be interchanged for comparisons amongst each other.
- If comparing a text field with an options list (that is Single-select), then the comparison uses the Code of the options list to compare. It does not compare the Description.
- Multi-selects are always treated as an OR scenario when performing the comparison logic. For example, if a text field is selected, and the comparison is to a multi-select field with 2 options (Option A and Option B) selected, then the condition evaluates whether the text matches either Option A OR Option B.
- Example: an internal candidate selects a question about their current division. A comparison can be used to determine if the answer matches the req division field.

Define value

When the field does not have a finite list of options to choose from (a text field) the Define value option is available. Text entered into this text box is evaluated based on the Operation defined.

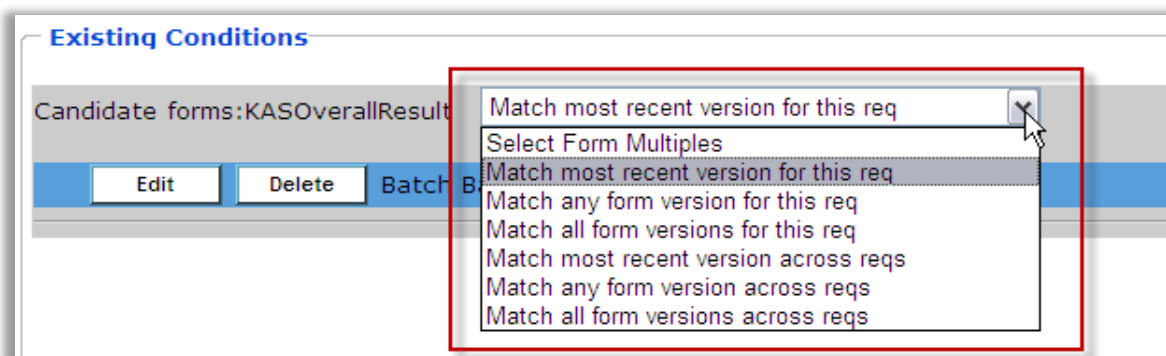
For example, the assessment form banding field is of type text. It has been selected with an operation of “Contains”. The Define value text entered here is “Pass”. When this condition runs, it looks up the band field to see if the value has the text “Pass” in it.

Use a semi-colon to separate multiple contains statements within the same condition.

Multiple Form Instances

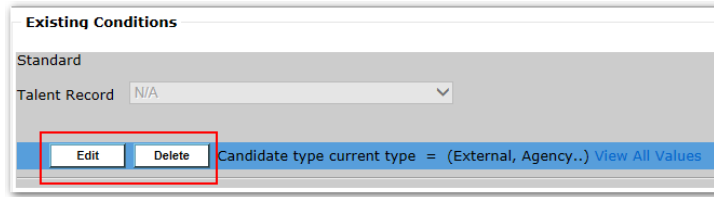
When you select a multiple per candidate, multiple per candidate per req, or multiple per req form (req sub form), you must specify which form version to use, since more than one may be on file for the candidate or req. In addition, you can add logic for the form to apply the condition scenario across reqs in the case of candidate forms. The following options are available for each form type.

- Single per candidate
 - Not applicable
- Multiple per candidate
 - Match most recent version
 - Match any form version
 - Match all form versions
- Single per candidate per req
 - Match form version for this req
 - Match most recent version across reqs
 - Match any form version across reqs
 - Match all form versions across reqs
- Multiple per candidate per req
 - Match most recent version for this req
 - Match any form version for this req
 - Match all form versions for this req
 - Match most recent version across reqs
 - Match any form version across reqs
 - Match all form versions across reqs
- Multiple per req (Req subsidiary form)
 - Match most recent version
 - Match any form version
 - Match all form versions



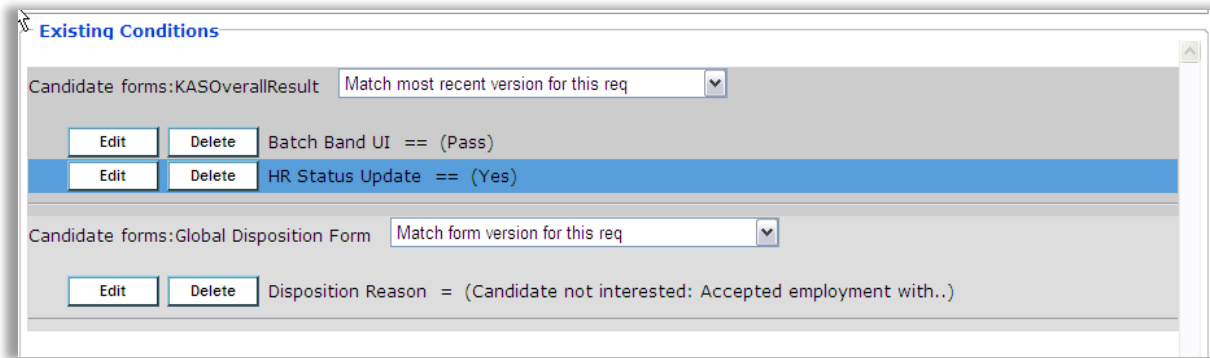
Existing Conditions

Once you save a condition, it displays in the existing conditions section at the bottom of the rule screen. To edit the existing condition, click Edit for the specific condition. To delete the existing condition, click Delete for the specific condition.



When more than one condition exists in a rule, the conditions are bound together using AND logic. For example, condition 1 has field X equal to Yes. Condition 2 has field Y equal to Yes. In order for the overall rule conditions to be true (and subsequently take action) field X and field Y both need to be Yes. You can achieve OR statements by creating another rule with a different set of conditions, or by utilizing the Link to existing rule condition where branching of rules can occur.

Multiple existing conditions that are using different fields on the same form are grouped together, and thus evaluated together for multiple form instances.

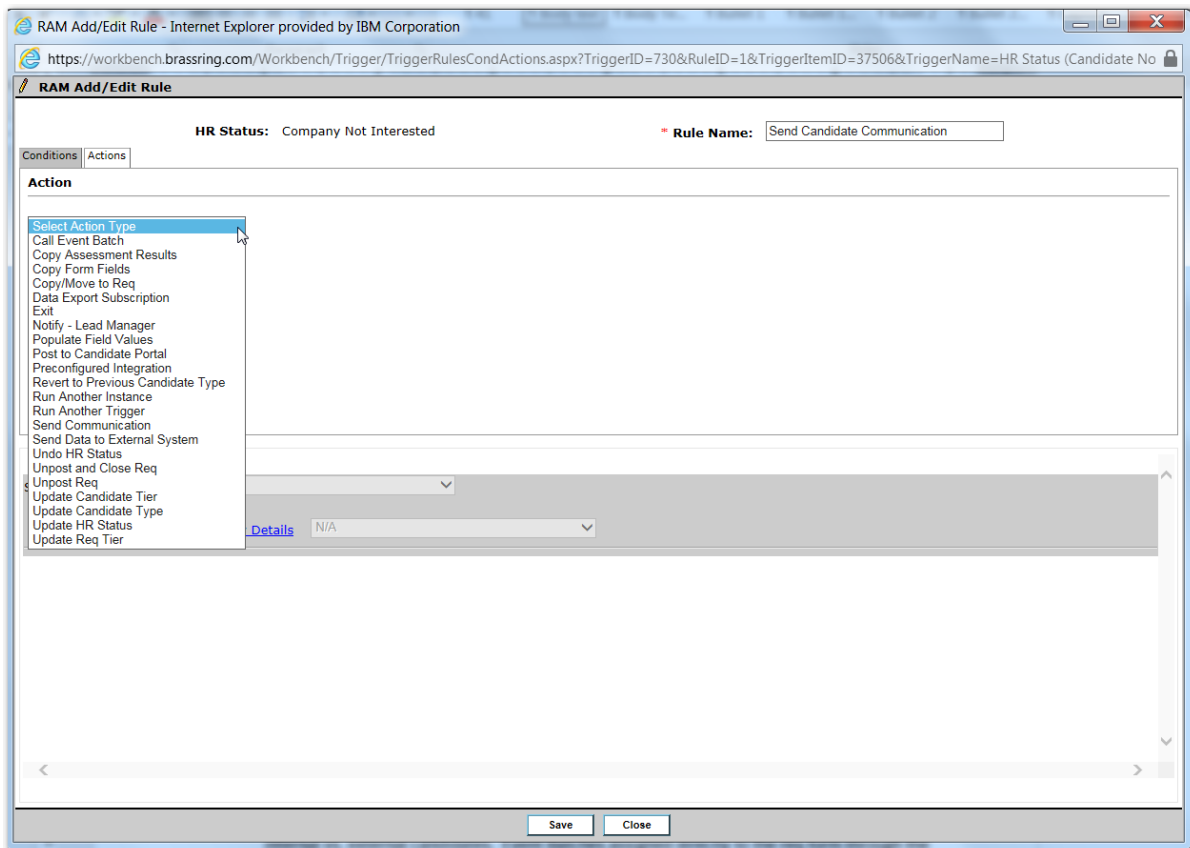


Actions

A rule is composed of conditions and actions. Conditions evaluate data in the system to produce a true/false result. Actions perform automation in the system when those conditions are true.

When you click Add Rule or Edit for an existing rule, the following screen displays. Clicking the dropdown allows you to select the action that will occur if the conditions for this rule are found to be true. This list will be dependent on the Triggering Mechanism and Trigger Context that is selected for the RAM trigger.

Individual actions are described in the following section.



Action Type

To create a new action, first select an action type. Selection of the type presents additional selections needed to specify the action. The available categories and general use are as follows. Keep in mind that the list of categories may change depending on the Trigger Mechanism and Trigger Context selected. In cases where there is no candidate in context, all candidate actions are hidden. In cases where there is no req in context, all req actions are hidden.

Action Type	Notes
Call Event Batch	<ul style="list-style-type: none"> The Call Event Batch action allows users to trigger an event invitation to be sent to candidates who meet the business rule conditions. The Event Batch configured in Event Manager and selected on the req determines: <ul style="list-style-type: none"> What invitation message is sent to the candidate To what event or events the candidate is invited Other settings around automated confirmation messages, automated reminder messages, invitation expiration, etc. The Event Batch is assigned to reqs through both req postings as well as a custom field on the req form. Event Batches assigned to req postings (on the posting options page) apply to candidates who apply to those req postings

	<p>directly. This allows clients to configure different event batches for internal vs. external candidates.</p> <ul style="list-style-type: none"> • Event Batches assigned directly to the req form through the custom req field apply to candidates who are moved, copied, or filed to the req outside of a Talent Gateway. • Example workflow: Joe Candidate applies to Req 123BR through a Talent Gateway. That req posting for 123BR is assigned to an event batch configured to trigger an invitation to Phone Screen events when candidates are assigned to the HR Status called Initial Screen. A RAM Trigger is configured for the HR Status called Initial Screen with a business rule containing the action to Call Event Batch. If Joe Candidate is set to the HR Status of Initial Screen within Req 123BR, then he automatically receives an invitation to register for a Phone Screen event. With that invitation, Joe Candidate can self-schedule for a Phone Screen event either through the Event Manager page on the Talent Gateway or through a link provided in the invitation message itself.
Copy Assessment Results	<ul style="list-style-type: none"> • This action copies any valid, required assessment results into the requisition in context. • The system automatically copies a candidate's existing, valid assessment results into any receiving reqs with all subsequent submissions.
Copy Form Fields	<ul style="list-style-type: none"> • If you need to copy Multiple fields from one form to another form (e.g. taking a snapshot of a form), create the fields on the destination form using the exact field names. You can then use the action instead of having to create an action for each individual field. That will copy all the fields common to both forms from the source form into the destination form.
Copy/Move to Req	<ul style="list-style-type: none"> • Also includes initial filing to req. • Supports automated functionality for what is available manually today • Used for Evergreen req scenarios - see additional sections below for more information.
Data Export Subscription	<ul style="list-style-type: none"> • This action will trigger an existing subscription. When the trigger initiates, it runs the data export subscription and calls the candidate export subscription based on the import/export for the client.
Exit	<ul style="list-style-type: none"> • When performed, this action causes the trigger to exit, and it also skips the running of any subsequent rules.
Notify – Lead Manager	<ul style="list-style-type: none"> • Notifies Lead Manager to either add a campaign, add a lead, or notify of a status change. Refer to Lead Manager documentation for further details.
Populate Field Values	<ul style="list-style-type: none"> • Automates the form create and update process • Can specify which value(s) to insert or update on forms • Req form fields, candidate form fields, req subsidiary form fields, and Talent record fields are supported • Talent record selection contains Candidate type, which can be updated.

	<ul style="list-style-type: none"> • Auto-fill fields on forms need to be explicitly added within the action in order for them to appear on the form. Select the auto-fill field, and click Save Action. No value selection is necessary in this case. • Support for dynamically populating fields based on other fields is allowed by utilizing the Use existing field selection where a source field can be specified. This is also allowed for auto-fill fields, where it overrides the standard auto-fill configuration. • If the destination is an option field, you need to make sure that the destination field has the same Options at the Code level than the source field. Otherwise, the type of the field should match between source and destination except if the destination is a text. In that case any source field type should work. • Also with fields that have constraints like date type, make sure that the constraint for the destination field allows dates in the past as the date from the source will most likely be an older date. • Constraints on the destination should at least allow the constraint on the source like a length constrain of the destination should allow at least the same length that the source field. • You should never use an autofill field as a source but rather use the source of the autofill. • If the destination field is autofill, you should add autofill field into the RAM configuration. Otherwise, the field wouldn't be auto-filled just because they are autofill. In this case you don't have to select a source for a destination autofill. • See additional section below for more information.
<p>Post Form to Candidate Portal</p>	<ul style="list-style-type: none"> • This action posts candidate forms to the Candidate Portal when a candidate’s HR status reaches the pre-defined HR status (selected for the Trigger Event).
<p>Preconfigured Integration</p>	<ul style="list-style-type: none"> • This action is used to configure the mappings for WOTC & Social source. • WOTC Templates display only when client setting of “Work Opportunity Tax Credit Integration” is Yes. • Social Source template displays only when client setting of “Integration Candidate Relationship Management (CRM)” is used with FADV selected. • Once the template is selected, the fields needing to be mapped for that vendor are displayed under the ‘Map Template Fields’. • No field mapping needed for BrassRing Candidate Relationship Manager.
<p>Revert to Previous Candidate Type</p>	<ul style="list-style-type: none"> • This action will revert the candidate type to its previous candidate type.
<p>Run Another Instance</p>	<p>(Run another trigger instance)</p> <ul style="list-style-type: none"> • This action is placed after ‘Update HR Status’ in a rule and this is a final action in a rule, the trigger exits once all actions in the rule are processed. • This action can be configured only once per rule. Once a ‘Run another instance’ action is saved, the user does not see this action category in the drop-down in the same rule. • The user can choose only one option between “Use existing date/numeric field” and “Select run frequency”.

Run Another Trigger	<ul style="list-style-type: none"> • This action is placed after 'Run another instance' in a rule and this is a final action in a rule, the trigger exits once this action is processed. • This action can be configured only once per rule. Once a 'Run another trigger' action is saved, the user does not see this action category in the drop-down in the same rule. • This new action is visible only for the following combinations: <ul style="list-style-type: none"> ○ Req based triggers (except Req Edit) with context 'Across Candidates' ○ Candidate based triggers with context 'Across Reqs' ○ HR Status
Send Communication	<ul style="list-style-type: none"> • Allows automated communication to be sent • Selection of language and email template occurs based on the user's BrassRing user ID. If the user's email address is the only available information, the system identifies the user's language (if it exists in the system). If the user's language information is not available on the user's BrassRing profile, then the communication is sent in the client's default language. • Selection of recipient list occurs. Recipients available are active users and the list is based on whether the candidate and/or req is in context. For example, a Req Edit trigger mechanism with a Trigger Context of None means the candidate is not in context. Therefore, the talent record email address is not listed as a recipient. • A checkbox is available to "Include old and new values..." for req form fields modified. This is used with the Condition of Req form fields modified. When checked, it appends the fields selected in the condition at the bottom of the email communication. Note: only fields contained within the condition are evaluated. And if the fields selected in the condition have not changed, they are not included in the email communication.
Send Data to External System	<ul style="list-style-type: none"> • Sends data to and receives data from an external system. The action is setup by the PSE team.
Undo HR Status	<ul style="list-style-type: none"> • Performs an Undo of the HR status for the candidate, returning candidate to the previous status • Behaves the same as an Undo in the BrassRing user interface
Unpost and Close Req	<ul style="list-style-type: none"> • This action allows unposting and subsequently closing of the req. • Selecting this action category unposts the req from all gateways and job boards as well as closes the req. No other selections are necessary with this category. • Standard prerequisites for closing the req apply here. • When you use this action, it is recommended to disable the auto-close user interface popup on the HR status.
Unpost Req	<ul style="list-style-type: none"> • This action allows only unposting the req. • Selecting this action category unposts the req from all gateways and job boards. No other selections are necessary with this category.
Update Candidate Tier	<ul style="list-style-type: none"> • This action updates the candidate tier. • Automates the same action that can be performed in the BrassRing UI for updating a candidate's tier. Usually, this is done in exception scenarios. • It is hidden if there is no req context for the trigger.

	<ul style="list-style-type: none"> • If the selected tier is not part of the req template when the trigger runs, the action does not complete.
Update Candidate Type	<ul style="list-style-type: none"> •
Update HR Status	<ul style="list-style-type: none"> • Updates the candidate’s HR status • Can disobey closed tracking logic rules if client setting is turned on for “Disobey Closed Tracking Logic in RAM”. Otherwise, the HR status updates only if it is an available next step in the configured workflow. • Additional options include the following checkboxes. Please note that no checkbox is required. If you want to update for the req in context, do not check any of the following checkboxes. <ul style="list-style-type: none"> ○ Only update in other reqs (all active req templates) – checking the box for this option means that this HR status update action occurs only in other reqs and not the req in context. Scenarios include the ability to update the candidate’s status in one req, and then reflect that same status update in all other reqs they presently reside in. For example, a candidate is updated to “Hire” in one req (this acts as the trigger mechanism). The candidate is then moved to a status called “Hired in other req” in other reqs (this is the rule action with only this checkbox setting checked). This option does not update candidates if they are in a final HR status. This option updates across all req templates. ○ Only update in other reqs (this req template) – checking the box for this option means that this HR status update action occurs only in other reqs and not the req in context. Scenarios include the ability to update the candidate’s status in one req, and then reflect that same status update in all other reqs they presently reside in. For example, a candidate is updated to “Hire” in one req (this acts as the trigger mechanism). The candidate is then moved to a status called “Hired in other req” in other reqs (this is the rule action with only this checkbox setting checked). This option does not update candidates if they are in a final HR status. This option updates across all reqs that have the same req template as the req in context. ○ Update across all active reqs in all req templates – checking the box for this option means that this HR status update action occurs in both this req and other reqs. Scenarios include the ability to disposition a candidate in one req, and reflect that same disposition status in other reqs. For example, a candidate has failed a drug screen and is updated to “Failed Drug Screen” final status. The candidate is moved to this status for all reqs. This option updates across all req templates. ○ Update across all active reqs in this req template – checking the box for this option means that this HR status update action occurs in both this req and other reqs. Scenarios include the ability to disposition a candidate in one req, and reflect that same disposition status in other reqs. For example, a candidate has failed

	<p>a drug screen and is updated to “Failed Drug Screen” final status. The candidate is moved to this status for all reqs. This option updates across all reqs that have the same req template as the req in context.</p>
<p>Update Req Tier</p>	<ul style="list-style-type: none"> • This action updates the currently visible req tier. • Automates the same action that can be performed in the BrassRing UI for updating the visible req tier. Usually, this is done in exception scenarios. • It is hidden if there is no req context for the trigger.

Populate Field Values Action Type

Populate Field Values: Define Value

When using the Populate field values action, the Define value option will be available for date, numeric, text, and text area field types. Enter a value that will then update the field on the form.

When selecting a date field, you complete the Define value or select from the list of options for Use existing field. The value of [Today] can be entered for Define value, and when the trigger runs and the action is performed, it has the effect of filling in the current date at run time. The option Extend/Reduce field value by (days) allows you to either extend or reduce by days the date that was entered in Define value or Use existing field. Example: If a candidate takes an assessment and the results for the assessments last for 90 days, then you would enter 90 days for Extend/Reduce field value by (days) as it would populate the date 90 days in the future.

The screenshot shows the configuration interface for the 'Populate Field Values' action. At the top, the action name is 'Populate Field Values'. Below this, the 'Category' is set to 'Candidate forms'. The 'Name' and 'Field' sections each show 'Selected (1)' with a 'List >>' button. In the 'Value' section, there are three radio button options: 'Populate field value in candidate locale' (unchecked), 'Define value' (checked and highlighted with a red box), and 'Use existing field' (unchecked). The 'Use existing field' option has a 'Select' button. The 'Concatenate fields' option is also unchecked and has a 'Selected (0)' label and a 'List >>' button. At the bottom of the configuration area are 'Save Action' and 'Cancel/Clear' buttons. Below the configuration area is a section for 'Existing Actions'.

Populate Field Values: Select Value(s)

When using the Populate field values action, the Select value(s) option is available for all finite selection lists (that is Single-select, Multi-select). Select a value or values, which will then update the field on the form.

The screenshot shows the 'Action' configuration window for 'Populate Field Values'. The 'Category' is set to 'Candidate forms'. The 'Name' and 'Field' sections each show 'Selected (1)' with a 'List >>' button. In the 'Value' section, the 'Select value(s)' radio button is selected and highlighted with a red box, with a 'List >>' button next to it. Other options include 'Populate field value in candidate locale' (unchecked), 'Use existing field' (unselected), and 'Concatenate fields' (Selected (0) with a 'List >>' button). At the bottom, there are 'Save Action' and 'Cancel/Clear' buttons, and an 'Existing Actions' section.

Populate field values - Use Existing Field

The Populate Field Values, use existing field is available for dynamically auto-filling fields. The source field to copy from can be set up as an action, effectively allowing for a field to have more than one source (achieved by setting up multiple rules). For example:

- Field A is a text field. Rule 1 is setup with a specific condition and then an action for populate Field A with the value from Field B.
- Rule 2 is setup with a different condition, and then an action for populate Field A with the value from Field C. This allows Field A to be populated based on some criteria.

When using the standard auto-fill field configuration (outside of the RAM), simply save the action after selecting the field. This option should NOT be used. This radio button should only be used when overwriting the standard auto-fill source setup. Or configuring a non-auto-fill field to be treated as one in the RAM as in the example above.

The screenshot shows the 'Action' configuration window for 'Populate Field Values'. The 'Category' is set to 'Candidate forms'. The 'Name' and 'Field' sections each show 'Selected (1)' with a 'List >>' button. In the 'Value' section, the 'Use existing field' radio button is selected and highlighted with a red box, with a 'Select' button next to it. Other options include 'Populate field value in candidate locale' (unchecked), 'Define value' (unselected), and 'Concatenate fields' (Selected (0) with a 'List >>' button). At the bottom, there are 'Save Action' and 'Cancel/Clear' buttons, and an 'Existing Actions' section.

Populate Field Values: Concatenate Fields

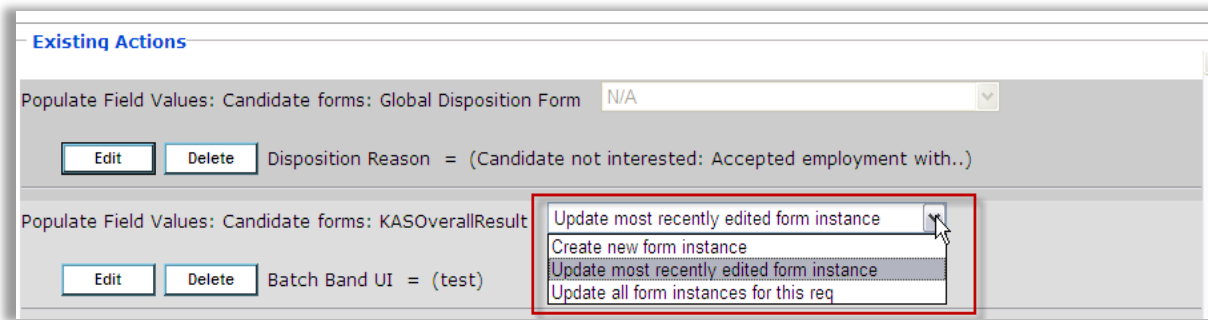
The Populate Field Values, concatenate fields is available for text and text area field types. This option allows the selection of one or more fields to be concatenated and then inserted in the text or text area form field. The following are additional concatenate field rules.

- The order of the fields selected and shown in the Selected side of the dialog box determines the order of the concatenation.
- If a field is blank when concatenating (meaning the field on the form is blank, or the form does not exist), text of “NA” is put in its place.
- Each field value is separated by a pipe symbol (|).
- If the sum of the character lengths of the fields selected are greater than the text or text area fields being populated (the destination field), then all characters past the destination field limit are truncated.
- For field types that have both Code and Description, the Description is used in the concatenation.
- Do not select encrypted fields for concatenation since they are not encrypted in the destination/concatenated field.
- SSN field types cannot be used in concatenation.
- Multi-select and checkbox fields are not available for selection.
- Date field types are reformatted as YYYY-MM-DD and include timestamp where applicable.

Populate Field Values: Multiple Form Instances


When an action for populating field values on a multiple per candidate or multiple per candidate per req form is saved, you must also specify how to handle the multiple versions. The following selections are available based on form type.

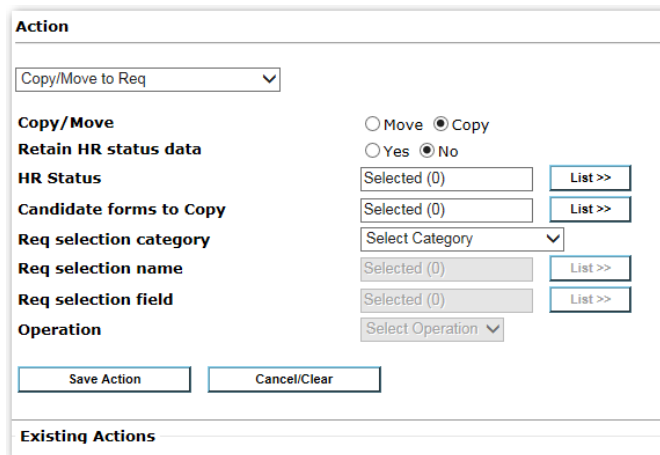
- Single per candidate and Single per candidate per req
 - If the form is one of these types, it will either update the form (if one is already present) or create a new form (if not already present).
- Multiple per candidate
 - Create new form instance
 - Update most recently edited form instance
 - Update all form instances
- Multiple per candidate per req
 - Create new form instance
 - Update most recently edited form instance
 - Update all form instances for this req



Copy/Move to Req

The Copy/Move to req action has many configuration options available for getting candidates from one req to another. The following selections are available within the Copy/Move action.

 Review the Evergreen Push and Evergreen Pull examples at the end of this document for additional information.



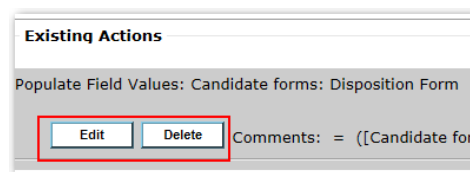
- Copy/Move
 - Copy: This copies the candidate from a source req into the target req (keeping the candidate in both reqs). Copy also files to a target req if there is no source req.
 - Move: This moves the candidate from a source req into the target req (removing the candidate from the source req and filing them into the target req). Move also files to a target req if there is no source req.
- Retain HR status data
 - Yes: This retains the HR status history in the source req, with association to the new target req.
 - No: This does not retain HR status history information.
- HR Status
 - This selection defines the starting HR status for the candidate after being put into the target req.
- Candidate forms to copy

- Before adding any forms to be copied, you must first ask yourself if these forms need to be duplicated. If the form needs to stay identical across req(s), that means you did not use the correct form type. Using a per candidate form will prevent creating duplicate forms.
- Make sure you are not adding a form that will trigger another RAM to run.
- This selection defines what PER REQ forms to copy with the candidate into the target req. When copied, the forms become associated with the target req.
- Auto-fill field values pulling from a req field are replaced with the destination req field values.
- If the candidate already exists in the target req, no forms are copied.
- If the candidate does not exist in the target req, but still has forms on file for the target req:
 - If the candidate form is a single per candidate per req form, the form is not copied.
 - If the candidate form is a multiple per candidate per req form, a new instance is created.
- If the candidate does not exist in the target req & no candidate forms exist, the forms are copied to the target req.
- For multiple per candidate per req forms, all instances are copied.
- Example: Assessment forms are multiple per candidate per req. Candidates complete the assessment in an evergreen req. However, when the candidates are copied into a target (hiring) req, the assessment information needs to be output on the grid. In order to accomplish this, the assessment form must be copied and associated to the target (hiring) req.
- Req selection category
 - Like conditions, this category acts as a filter to identify the field that will be used to build criteria defining when a candidate should be copied/moved.
 - Options include: Candidate forms, Req form fields, Req Status, Req subsidiary form fields, Req templates.
- Req selection name
 - This field is used to identify the form in which you would like to build your filter off of (similar to conditions).
- Req selection field
 - This field is used to identify the field in which you would like to build your filter off of (similar to conditions).
 - This is the field is used to get either the Req ID or get all reqs matching a field value.
- Operation
 - Select “Use Field Value” if you are looking to copy or move a candidate into a req where the field identified in the “Req selection field” contains a req ID.
 - Example: An exception scenario allows Hiring Managers to file candidates to reqs outside of the standard application process. However, this is only allowed after approval. A candidate form is setup with an approval process. The form is multiple per candidate. The hiring manager finds the candidates, then adds the exception form. The exception form contains a field Y which captures the req ID that the candidate needs to be filed into. The hiring manager types in the req ID into that field Y, then routes it for approval. A RAM trigger is set up based on form approval, with an action of copy/move. The Req selection field has field Y as the field selected. Therefore, when the RAM runs, it looks up the req ID on the exception form, field Y, and then files the candidate to that req.
 - All other operations function as they traditionally do under the conditions section.

- The list of operations will be determined based on the field type selected in the “Req selection field”.
- Define Value
 - Like conditions, this is the value that is used to filter for Evergreen reqs that match the typed in value.
- Select Value
 - Like conditions, this is the value that is used to filter for Evergreen reqs that match the selected value.
- Compare value
 - When using the Evergreen push scenario (see example towards the end of this document):
 - For candidate form field comparisons with req fields, select the req field to compare to the candidate form field.

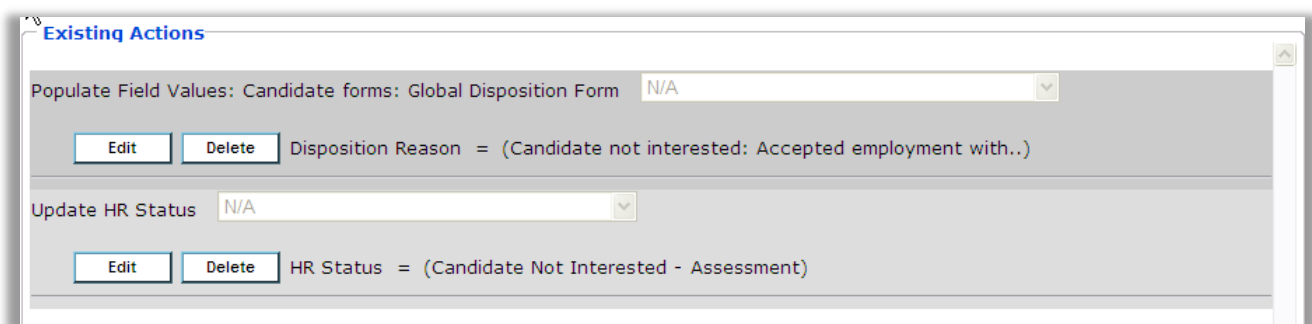
Existing Actions

Once an action has been saved, it is added to the Existing Actions section at the bottom of the rule page. To edit the existing action, simply click on the Edit button for the specific action. To delete the existing action, click on the Delete button for the specific action.



Multiple actions can be defined for a given rule. For example, an HR status can be updated and a disposition form can be filled out with a certain value corresponding to the HR status.


Multiple existing actions that are populating different fields on the same form are grouped together and thus populated together for multiple form instances.



Activating RAM Triggers

By default, RAM triggers are placed in a draft status during initial creation. This allows configuration to occur periodically before testing. RAM triggers are also placed in draft after clicking to edit an active trigger. These triggers should be activated once all changes are completed.

Once a trigger is ready for use, it must be activated. Select the trigger and click the Activate trigger menu option. Once activated, the trigger is live.

 Customers with Power User access within Workbench can create RAM triggers in both Staging and Production environments, but can only activate them in Staging. To activate a Production RAM trigger, customers should reach out to their IBM representative.

Actions > Triggers

View: [Active | Draft | Inactive] [All | Search | Advanced Search]
Showing 17 triggers

Select	Automation Trigger Name	Trigger type	Trigger Mechanism: Event
<input type="radio"/>	Background Check Complete(HR Status)	RAM Trigger	HR Status: Background Check Complete
<input type="radio"/>	Failure to Complete Assessment	RAM Trigger	Assessment Initiated: Standard Req_Std Approval
<input checked="" type="radio"/>	HR Status (Applied)	RAM Trigger	HR Status: Applied
<input type="radio"/>	HR Status (Candidate Not Interested)	RAM Trigger	HR Status: Company Not Interested
<input type="radio"/>	HR Status (Hired)	RAM Trigger	HR Status: Hired
<input type="radio"/>	HR Status (Initiate Assessment)	RAM Trigger	HR Status: Initiate Assessment
<input type="radio"/>	HR Status (Manually Filed)	RAM Trigger	HR Status: Manually Filed
<input type="radio"/>	HR Status (Offer Extended)	RAM Trigger	HR Status: Offer Extended
<input type="radio"/>	HR Status Req Options (Hired)	RAM Trigger	HR Status Req Options: Hired
<input type="radio"/>	Req Aging (Pending)	RAM Trigger	ReqPending: Standard Req_Std Approval
<input type="radio"/>	Req approved Status Aging 2	RAM Trigger	Req Approved: Standard Req_Std Approval
<input type="radio"/>	Req approved Status Aging 3	RAM Trigger	Req Approved: Standard Req_Std Approval

If you would like to activate multiple triggers at once, select the Bulk activate RAM triggers action. This will display an additional window that will allow you to select which triggers you would like to activate. Select Activate once all triggers are selected.

Actions > Triggers

View: [Active | Draft | Inactive] [All | Search | Advanced Search]
Showing 17 triggers

Select	Automation Trigger Name	Trigger type	Trigger Mechanism: Event
<input type="radio"/>	Background Check Complete(HR Status)	RAM Trigger	HR Status: Background Check Complete
<input type="radio"/>	Failure to Complete Assessment	RAM Trigger	Assessment Initiated: Standard Req_Std Approval
<input checked="" type="radio"/>	HR Status (Applied)	RAM Trigger	HR Status: Applied
<input type="radio"/>	HR Status (Candidate Not Interested)	RAM Trigger	HR Status: Company Not Interested
<input type="radio"/>	HR Status (Hired)	RAM Trigger	HR Status: Hired
<input type="radio"/>	HR Status (Initiate Assessment)	RAM Trigger	HR Status: Initiate Assessment
<input type="radio"/>	HR Status (Manually Filed)	RAM Trigger	HR Status: Manually Filed
<input type="radio"/>	HR Status (Offer Extended)	RAM Trigger	HR Status: Offer Extended
<input type="radio"/>	HR Status Req Options (Hired)	RAM Trigger	HR Status Req Options: Hired
<input type="radio"/>	Req Aging (Pending)	RAM Trigger	ReqPending: Standard Req_Std Approval
<input type="radio"/>	Req approved Status Aging 2	RAM Trigger	Req Approved: Standard Req_Std Approval
<input type="radio"/>	Req approved Status Aging 3	RAM Trigger	Req Approved: Standard Req_Std Approval

Bulk activate RAM triggers

Select trigger(s) to Activate: Selected (2)

Select All	Trigger Name	Date created	Created By
<input checked="" type="checkbox"/>	[Draft] HR Status (Hired)	31 Jul 2017	Trumble, Niki
<input checked="" type="checkbox"/>	[Draft] HR Status (Candidate Not Interested)	04 Dec 2017	Trumble, Niki


Editing Active Triggers

If edits are needed for an existing trigger, select the appropriate trigger and click Edit trigger.


Actions ▶ **Triggers**

View: [Active | Draft | Inactive] [All | Search | Advanced Search]
Showing 15 triggers

Select	Automation Trigger Name	Trigger type	Trigger Mechanism: Event
<input type="radio"/>	Approval Reminder	Req Aging	
<input type="radio"/>	Candidate Form Insert (Social Referral Form)	RAM Trigger	Candidate Form Insert: Employee_Referral_PR
<input type="radio"/>	Candidate HR Status of Offer Greater than 5 days	Candidate HR Status Aging	
<input type="radio"/>	Communication to Recruiter upon App Completion	RAM Trigger	Candidate Form Insert or Update: Application Form
<input type="radio"/>	Evergreen Req - Candidate Archive	Evergreen Req - Candidate Archive	
<input type="radio"/>	Gateway Posting Expiration	Gateway Posting Expire	
<input checked="" type="radio"/>	HR Status (First Interview)	RAM Trigger	HR Status: First Interview
<input type="radio"/>	HR Status (Hiring Manager Review)	RAM Trigger	HR Status: Hiring Manager Review
<input type="radio"/>	Job Post	RAM Trigger	Job Post: Candidate Tiering Req Form, Evergreen Req Approval

 **Note:** Take caution when making modifications to active triggers.

When you click Edit trigger for any trigger that does not have versioning, or when this is the first time you are editing the trigger, an option is presented to either use versioning or make the change immediate once activated again.

 **Note:** Make the selection carefully as this will greatly affect how the RAM trigger functions moving forward.

Workbench

Tools Training Admin

Actions ▶ **Triggers**

View: [Active | Draft | Inactive] [All | Search | Advanced Search]
Showing 15 triggers

Select	Automation Trigger Name	Trigger type	Trigger Mechanism: Event
<input type="radio"/>	Approval Reminder	Req Aging	
<input type="radio"/>	Candidate Form Insert (Social Referral Form)	RAM Trigger	Candidate Form Insert: Employee_Referral_PR
<input type="radio"/>	Candidate HR Status of Offer Greater than 5 days	Candidate HR Status Aging	
<input type="radio"/>	Communication to Recruiter upon App Completion	RAM Trigger	Candidate Form Insert or Update: Application Form
<input type="radio"/>	Evergreen Req - Candidate Archive	Evergreen Req - Candidate Archive	
<input type="radio"/>	Gateway Posting Expiration	Gateway Posting Expire	
<input checked="" type="radio"/>	HR Status (First Interview)	RAM Trigger	HR Status: First Interview
<input type="radio"/>	HR Status (Hiring Manager Review)	RAM Trigger	HR Status: Hiring Manager Review
<input type="radio"/>	Job Post	RAM Trigger	Job Post: Candidate Tiering Req Form, Evergreen Req Form, Standard Req_S Approval


Editing this trigger will put the trigger into Draft status. Trigger events that come in during the time this trigger is in Draft status will be held until the trigger is activated again. If you want to continue, please select from the two options below. Otherwise, you can cancel.

1. Create a new version of the trigger which will only apply the changes to new reqs once activated again (Recommended).
2. Make changes immediately across all reqs once activated again.








- Create new version and apply changes to new reqs:
 - This option is rarely used. Most users will use the option of “Make changes to existing version and apply changes across all reqs”.
 - Versioning for RAM triggers
 - Selecting this option will apply the changes you are about to make only to reqs opened after the change was made active. This allows all candidates within a req to follow the same trigger logic. While saving the changes in the new version, you must specify a different trigger name. It is recommended to append “v2”, “v3”, etc. onto the name. Once activated, only one trigger is seen under this new name.
 - Once a trigger has initially been selected for versioning, it only allows any additional changes to use versioning as well.

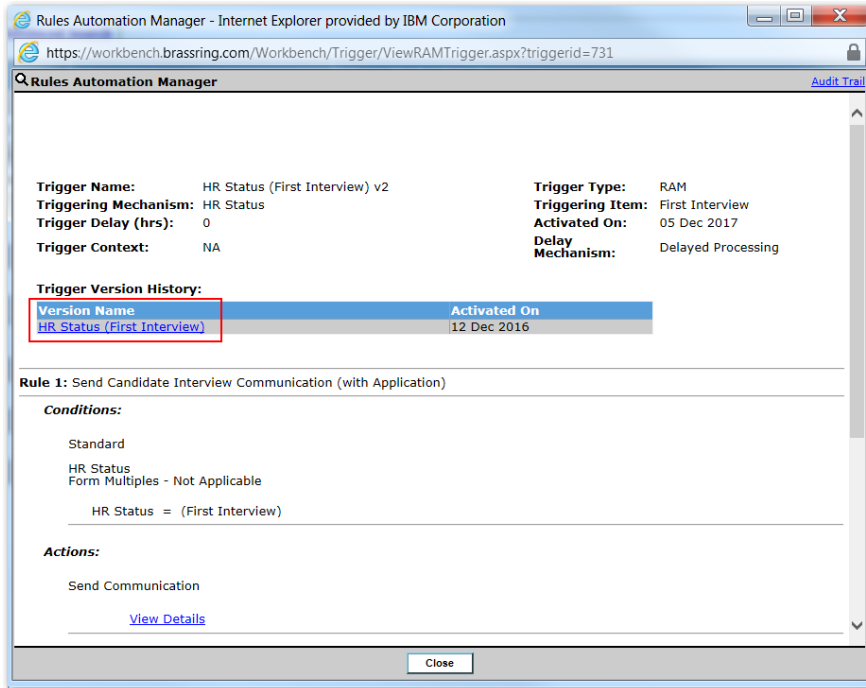
- If you no longer want to use versioning for a RAM trigger, you can use the action “Delete previous trigger versions”.
- Make changes to existing version and apply changes across all reqs:
 - Does not create versioning for RAM triggers
 - Selecting this option will make the change immediately (upon activation) across all reqs. The new trigger logic takes effect immediately, therefore you may see a mixture of trigger logic for candidates within a req.

In either scenario above, the trigger is put into draft status while the changes are being made. Once edits are finished, you must activate the trigger again.

 Note: While the trigger is in draft status, all trigger events that occur during the time the trigger has been put into draft status are held until the trigger is made active again (up to 2 weeks). Once made active again, the events that occurred during the time the trigger was in draft status are processed. After 2 weeks any events during the draft period will be ignored. Also, triggers should not stay in draft mode in production for a long period of time since all testing must be completed in staging.

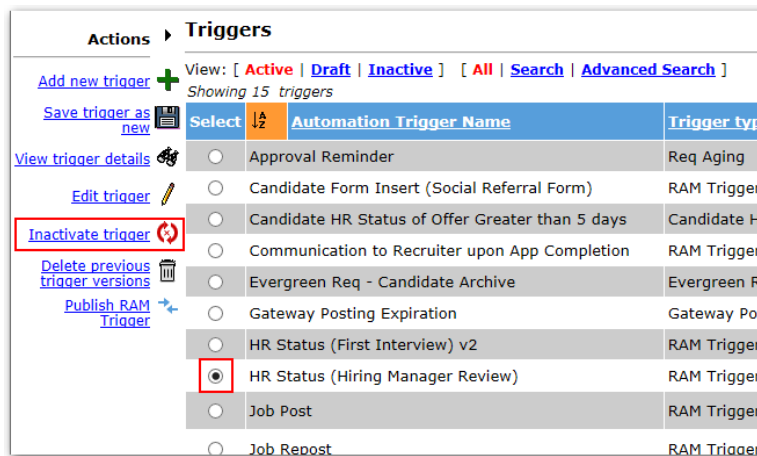
View different versions by using the View trigger details menu option. Links are available for all previous versions.

Actions		Triggers		
Add new trigger 		View: [Active Draft Inactive] [All Search Advanced Search]		
Save trigger as new 		Showing 15 triggers		
View trigger details 		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit trigger 		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inactivate trigger 		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delete previous trigger versions 		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Publish RAM Trigger 		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Inactivating Triggers

If the trigger is no longer needed, it can be made inactive by selecting the trigger and Inactivate trigger.



- When a trigger is made inactive, triggering events are no longer processed or held.
- A trigger can be made active again once it has been inactivated. However, it is treated as if this is the first time the trigger has been made active. (All trigger events that occur during the time the trigger has been in an inactive status not held until the trigger is made active again.)
- Only active triggers can be moved to the inactivate status. If you would like to make a trigger inactive that is in draft, you must first activate that trigger, then choose to inactivate it.
- If an HR status or form is still selected for a trigger that is inactive, it is not available for selection as a trigger event.

Deleting Triggers

If a trigger was created in error or was a trigger that will never be needed or used again, it can be deleted. This option is available only for triggers in Draft status. Select the trigger and click the Delete trigger action.

- Deleting an active trigger requires you to edit the active trigger first so it is put into a draft status. It can then be deleted from the draft status list.



Note: It is recommended to inactivate triggers rather than deleting.

Actions		Triggers	
Add new trigger	View: [Active Draft Inactive] [All Search Advanced Search]		
Save trigger as new	View trigger details	Select	Automation Trigger Name
Edit trigger	Activate trigger	<input type="radio"/>	Background Check Complete(HR Status)
Bulk activate RAM triggers	Delete trigger	<input checked="" type="radio"/>	Failure to Complete Assessment
Publish RAM Trigger		<input type="radio"/>	HR Status (Applied)
		<input type="radio"/>	HR Status (Candidate Not Interested)
		<input type="radio"/>	HR Status (Hired)
		<input type="radio"/>	HR Status (Initiate Assessment)
		<input type="radio"/>	HR Status (Manually Filed)
		<input type="radio"/>	HR Status (Offer Extended)
		<input type="radio"/>	HR Status Req Options (Hired)
		<input type="radio"/>	Req Aging (Pending)
		<input type="radio"/>	Req approved Status Aging 2

Deleting Previous Trigger Versions

This option allows you to delete all previous trigger versions.

- Available for triggers in Active and Inactive statuses.
- Any new trigger events will use the configuration as defined in the most recent trigger version from then on.
- When such triggers are edited the next time, the user is presented with the option to use versioning or continue without using versioning.
- For Active triggers, no events are missed when the delete versioning is processed.

Workbench

Tools Training Admin

Actions Triggers

View: [Active | Draft | Inactive] [All | Search | Advanced Search]
Showing 15 triggers

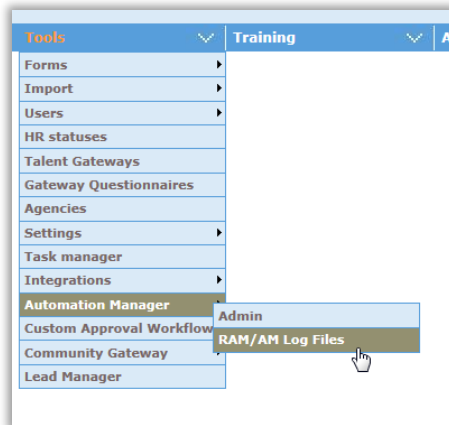
Select	Automation Trigger Name	Trigger type	Trigger Mechanism: Event
<input type="radio"/>	Approval Reminder	Req Aging	
<input type="radio"/>	Candidate Form Insert (Social Referral Form)	RAM Trigger	Candidate Form Insert: Employee_Referral_PP
<input type="radio"/>	Candidate HR Status of Offer Greater than 5 days	Candidate HR Status Aging	
<input type="radio"/>	Communication to Recruiter upon App Completion	RAM Trigger	Candidate Form Insert or Update: Application
<input type="radio"/>	Evergreen Req - Candidate Archive	Evergreen Req - Candidate Archive	
<input type="radio"/>	Gateway Posting Expiration	Gateway Posting Expire	
<input checked="" type="radio"/>	HR Status (First Interview) v2	RAM Trigger	HR Status: First Interview
<input type="radio"/>	HR Status (Hiring Manager Review)	RAM Trigger	HR Status: Hiring Manager Review
<input type="radio"/>	Job Post	RAM Trigger	Job Post: Candidate Tiering Req Form, Evergr Approval

Warning: Please confirm that you wish to delete all previous trigger versions. This means any new triggers events will use the configuration as defined in the most recent trigger version from now on. This action cannot be undone.

OK Cancel

RAM Log

The Rules Automation Manager (RAM) log allows Workbench users to troubleshoot and review RAM activity within the system. This is found under Tools > Automation Manager > RAM Logs.



Notes:

- RAM log information is stored for 6 months.
- When using the RAM log to troubleshoot, it is helpful to take a screenshot of your RAM trigger (rules, conditions, actions), or have the RAM trigger open in a separate browser window, in order to easily compare the results to the configuration. The RAM log is not always easy to read or intuitive, so being able to view the configuration at the same time can be very beneficial.

Who has access?

- Tier 5
- Power User
- Tech Services
- Helpdesk
- Super User

Most Frequent Searches

- Searching by one or more triggers with one or more statuses to research a specific trigger issue.
- Searching for a specific candidate and using a window of time that covers the candidate’s recent HR Status history.
 - By not specifying a requisition, you will get all triggers that ran on that candidate.
- Searching by a specific requisition, for triggers that are requisition specific (not candidate specific).
 - Entering a “0” for the candidate reference number will speed up the search by limiting it to only triggers that don’t have candidate in their context.

Retrieve RAM/AM Log Files

Trigger information

Trigger name Select Trigger

Status

Error while processing
 Error writing log files
 Unexpected error(s) after processing
 Unexpected error(s) before processing
 Error calling Webservice

Candidate information

First name


Last name

Candidate reference number

Req information

Auto Req ID

Start date End date

 **Note:** At least one search field must be entered to run a search

Searching by One or More Triggers

A specific search can be run to view all activity for a specific RAM trigger, or triggers. In addition, to help troubleshooting, you can also specify the status of the trigger in question.

The screenshot shows the 'Retrieve RAM/AM Log Files' form. The 'Trigger information' section is highlighted with a red border. It contains a 'Trigger name' field with a 'Select Trigger' button and a 'Status' dropdown menu. The dropdown menu is open, showing options: 'Error while processing', 'Error writing log files', 'Unexpected error(s) after processing', 'Unexpected error(s) before processing', and 'Error calling Webservice'. Below this, the 'Candidate information' section has fields for 'First name', 'Last name', and 'Candidate reference number'. The 'Req information' section has an 'Auto Req ID' field. At the bottom, there are 'Search' and 'Clear' buttons, with the 'Search' button also highlighted by a red box.

Searching a Specific Candidate

A specific candidate can be searched to provide a list of all RAM triggers that have run for the candidate. Searching is available by First Name, Last Name, or Candidate Reference Number. In addition, a given time period can be used to more easily target specific triggers.

This screenshot is identical to the one above, showing the 'Retrieve RAM/AM Log Files' form. In this view, the 'Candidate information' section is highlighted with a red border. This section includes input fields for 'First name', 'Last name', and 'Candidate reference number'. The 'Trigger information' section and the 'Search' button at the bottom are also visible.

Searching a Specific Requisition

A specific req can be searched to provide a list of all RAM triggers that have run for that requisition. Searching is available by Auto Req ID (example: 123BR). In addition, a given time period can be used to more easily target specific triggers.

Retrieve RAM/AM Log Files

Trigger information

Trigger name: Select Trigger

Status:
Error while processing
Error writing log files
Unexpected error(s) after processing
Unexpected error(s) before processing
Error calling Webservice

Candidate information

First name:

Last name:

Candidate reference number:

Req information

Auto Req ID:

Search Clear

Trigger Results

Results are shown in a grid, sorted by the most recent trigger run time. Results display in the grid for the last 6 months for RAM triggers. AM triggers do not have logs. Other columns can be sorted in order to drill down on a specific trigger instance.

RAM/AM Search Log Results									
Showing Candidate Search Results 1 - 25 of 100 - Page: 1 2 3 4 Next									
Select	View Raw Log	Candidate name	Candidate reference#	Trigger name	Req Info	Trigger run time	Execution status		
<input type="checkbox"/>		Michael Williams	20170801	Active Applicant	2017-12-08	2017-12-08 14:01:16.330	Success with exit action(s)		
<input type="checkbox"/>		David Taylor	20170801	Candidate Checklist Review	2017-12-08	2017-12-08 14:01:04.730	Success with no action		
<input type="checkbox"/>		Isaura Marshall Brown	20170801	1st Interview Scheduled	2017-12-08	2017-12-08 13:59:06.433	Success with exit action(s)		
<input type="checkbox"/>		Michael Williams	20170801	Active Candidate 2	2017-12-08	2017-12-08 13:58:07.270	Success with exit action(s)		
<input type="checkbox"/>		Michael Williams	20170801	L Candidate Checklist Review	2017-12-08	2017-12-08 13:57:15.297	Success with no action		
<input type="checkbox"/>		Michael Williams	20170801	Candidate Checklist Review	2017-12-08	2017-12-08 13:57:14.280	Success with no action		
<input type="checkbox"/>		Quiana Marshall Brown	20170801	Active Applicant	2017-12-08	2017-12-08 13:54:19.237	Success with exit action(s)		
<input type="checkbox"/>		James Lee	20170801	Active Applicant	2017-12-08	2017-12-08 13:54:18.283	Success with exit action(s)		
<input type="checkbox"/>		Michael Williams	20170801	Active Candidate	2017-12-08	2017-12-08 13:54:14.703	Success with other action(s)		
<input type="checkbox"/>		Michael Williams	20170801	Candidate Checklist Review	2017-12-08	2017-12-08 13:53:17.977	Success with no action		

View Raw Log

Selecting the View Raw Log icon for a given trigger instance displays more specific details of what occurred with that trigger when it ran.

Reading the Raw Log

- Each log will start with "Start trigger ...". This line indicates the trigger number, the Client ID, and when the trigger ran (not when it was triggered). (Time is in EST.)
- Clicking on the light blue hyperlink will display the trigger delay, delay mechanism, and trigger mechanism.
- This line depends on the type of trigger, but in this example, it shows the Candidate Reference Number and Req IDs (both 'custom' and BR/standard).
 - The log will then display 2 lines for each rule:
 - The first one for the rule will be green if all the conditions are true or dark blue if at least one condition is not true.

- The second line will also be green when the rule is true and the action was taken. Clicking on that link will extend and display all actions taken. (Each action can also be extended to see, for example, email address used in the Send Communication action.)
- 4. This rule is the first rule in the trigger, indicated by the (1), and shows a green link for both lines, meaning all conditions were true and an action was carried out.
- 5. This rule shows a dark blue color for the first link because at least one condition was found to be not true. The second link for the rule is not hyperlinked because no actions were carried out.

Start trigger 92 for client [REDACTED] at 2017.10.02 18:32:57:5460 1

[Trigger:Applied Production \(Real!\)1 \(92\) started.](#) 2

TriggerWorkflowDataID:28194843

TriggerType:10

TriggerDelay:0

DelayMechanism:processing

TriggerMechanism:HRStatus

Context Candidate:([REDACTED]) reqid:[REDACTED] optional:[REDACTED]BR 3

[Processing Rule:\[REDACTED\] Export\(1\)](#) 4

[Processing Rule:\[REDACTED\] Export\(1\): All Conditions are True \(Actions\)](#)

[Processing Rule:Send email \(Corp office and SCC\)\(2\)](#) 5

[Processing Rule:Send email \(Corp office and SCC\)\(2\): All Conditions are False](#)

Clicking on the first “Processing Rule...” link will display a line for each condition.

- **Green** means the condition is true.
- **Orange** means the condition was not true.

Start trigger 98 for client [REDACTED] at 2017.10.02 13:57:07:8793

[Trigger:HR Status = Not Qualified \(98\) started.](#)

Context Candidate:([REDACTED]) reqid:[REDACTED] optional:[REDACTED]BR

[Processing Rule:Send Communication\(1\)](#)

Condition ReqForm is False:Check Fields: 1 Instance : [REDACTED] : Current

Condition HRStatus is True:Check Fields: 2 Instance : HRStatus Scope : Current

[Processing Rule:Send Communication\(1\): All Conditions are False](#)

Clicking on the condition will also give more detail. For example:

- **First Condition:** Looking for the Department field on the Corporate Hiring req form to = Office (Code is: Corporate).
 - The field is found (1) on the req form
 - The field on the req equals (EQ) = Franchise and the RAM is comparing it to the condition’s option.
 - Therefore, the condition is NOT TRUE
- **Second Condition:** Looking for the current HR Status to = Not Qualified (40851).
 - The HR Status is found (1)
 - The HR Status equals (EQ) = 40851

- Therefore, the condition is TRUE
- Tip: Find the HR Status ID by doing a ‘view source’ on the HR Status page of Workbench.

```

<td align="left" valign="middle" nowrap="" colspan="1">
  <a class="linkClass" href="#" onclick="
    viewstatus('view', 'Not Qualified', '40851');" title="Click to View HR Status details">Not Qualified</a>
</td>
<td align="left" valign="middle" nowrap="" colspan="1">Final</td>

```

Processing Rule:Send Communication(1)

Condition ReqForm is False:Check Fields: 1 Instance : [redacted] : Current

Field : Department
 DateSet:
 Instance: [redacted] Corporate Hiring (686) Field:Department (7883) Value:Franchise
 # of fields found = 1
 Form: 686 index: 0
 Field: Department
 EQ franchise with : corporate
 # of Matches : 0
 Form Instance 0 result is False
 0 Instance Forms 1

Condition HRStatus is True:Check Fields: 2 Instance : HRStatus Scope : Current

Field : HRStatus
 DateSet:
 Instance: (348846) Field: (0) Value:40851
 # of fields found = 1
 Form: 348846 index: 0
 Field: HRStatus
 EQ 40851 with : 40851
 # of Matches : 1
 Form Instance 0 result is True

Processing Rule:Send Communication(1): All Conditions are False

The second “Processing Rule...” link will be available if all conditions are true.

By clicking on the link to expand the action section, you can view what actions were successfully taken. In this example, the action was to Send the Candidate Rejection communication template to the candidate.

Processing Rule:Send Communication - All Stores(3)

Processing Rule:Send Communication - All Stores(3): All Conditions are True (Actions)

Action:Notification

Sending communicationCandidate Rejection - Store to : [redacted]@gmail.com

Action:Notification start 2017.10.02 13:57:07:8973 End 2017.10.02 13:57:08:2233

ProcessRules status: Success with other action(s)

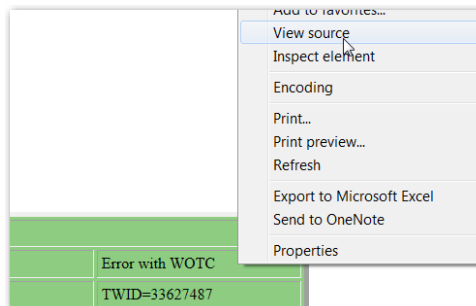
The log will always terminate with “End trigger...” and the green grid, such as the one below. This includes the date and time when the trigger finished running.

End trigger 98 for client [REDACTED] at 2017.10.02 13:57:08:2233

Client	[REDACTED]	ClientId= [REDACTED]	Success with other action(s)
Trigger	HR Status = Not Qualified	TriggerID=98	TWID=28149448
Mechanism	HR Status	MechanismValue	40851
DelayMechanism	Processing	Context	None
Candidate	[REDACTED]	Resumekey= [REDACTED]	
Requisition	[REDACTED]	ReqID= [REDACTED]	FolderID= [REDACTED]
Environment	prod-dbc18-40.prod.brassring.com\entdb_40	36_40	ENCOM-31

This grid should always be included in tickets/PMRs sent to the GSC as it clearly identifies the client/environment/trigger/candidate/requisition data.

When working with integration RAMs (RAMs configured to perform web service operations), you can view the XML sent to the vendor by right clicking on the grid > View source. This will provide you with even more log data.



```

tion>AHQ WOTC Testing -
S3</position><hourlyrate>43.27</hourlyrate><locationid>003E8C</locationid></req></applicant></wotc_cs></tem
:wotcXml></tem:ProcessWOTCRequest></soapenv:Body></soapenv:Envelope></h5>
set header SOAPAction : "http://tempuri.org/IWOTCCS/ProcessWOTCRequest"
CheckWebServiceCallResponseStatus error: wotc_cs/applicant/hire/jobofferdate has wrong value, please send
correct value
<h4> CheckWebServiceCallResponseStatus found an error in the WebService call response. Response Error:
wotc_cs/applicant/hire/jobofferdate has wrong value, please send correct value</h4>
<h5>Action:WebService start 2017.08.15 13:03:12:0113 End 2017.08.15 13:03:13:6650</h5>
ProcessRules no retry status: Error with WOTC
</div>

```

- Find the section corresponding to the XML request and response (these are embedded within an <h5> tag on the left side).
- For both the request and response XML, two versions are shown. The second one is the actual XML with data values present sent to the external system (values are of course based on the mapping provided).

Multiple Start and End Trigger Sections

If the trigger ran multiple times the “Start trigger...” and “End trigger...” would be repeated each time the trigger ran in chronological order.

- The last run will be found at the end of the log.
- Example shows that the trigger ran twice on 3/31 and then again on 5/06:


```

Start trigger 299 for client 11724 at 2016.03.31 05:19:07:7204
Trigger:SPC --CF (299) started.
Context Candidate:(457700) reqid:0 optional:NoReq
Processing Rule:Test(1)
Processing Rule:Test(1) No Conditions (Actions)
End trigger 299 for client 11724 at 2016.03.31 05:19:16:5533
Start trigger 299 for client 11724 at 2016.05.06 04:53:39:8812
Trigger:SPC --CF (299) started.
TriggerWorkflowDataID:15515
TriggerType:10
TriggerMechanism:CandidateFormInsertUpdate
Context Candidate:(457700) reqid:0 optional:NoReq
Processing Rule:Test(1)
Processing Rule:Test(1) No Conditions (Actions)
End trigger 299 for client 11724 at 2016.05.06 04:53:41:6114

```

“Truncate to the most recent” Message

Sometimes you will see a message at the top of the log that reads “Log has been truncate to the most recent 250 000”. This usually indicates a very complex trigger that has been run multiple times as there are too many rules/conditions/actions or the pull trigger is misconfigured. If this happens, create a PMR. Most likely, your trigger is not set-up correctly which can have a negative impact on the system. Only the most recent ran log will be available.

Always start from the bottom.

Conditions

The color coding (green for true vs orange for false) for the conditions should be enough to identify the condition that was true or not AT THE TIME the trigger ran.

If a condition is true now but was not true at the time the trigger ran it is most likely due to a change that happened after the trigger ran, such as a HR Status update, a form update, or a change to the trigger rather than a bug in RAM.



Note: Pay attention to the RAM trigger’s start/end date/time stamp and compare that to date/time stamps viewable in BrassRing to see if the actions took place after the RAM trigger ran.

Example shown: RAM checking a field that doesn’t exist.

Trigger:HR Status Update - 1st Interview (936) started.

Context Candidate:(22028147) reqid:2242832 optional:380732BR

Processing Rule:Non-Compete - Send email(1)

Condition CandidateForm is False:Check Fields: 1 Instance : Talent-Gateway Scope : Current

Field : non_compete

DateSet: Empty

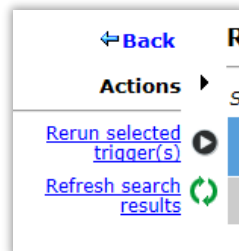
Count of fields found = 0

“**DataSet: Empty**” means that there was no value found for the field “non compete”. Either the form or the field on the form does not exist at the time the trigger ran. If the field exists on the form, make sure it is the field on the same req template included in the trigger.

RAM Log Actions

Two actions are available after running the RAM log.

1. **Rerun selected trigger(s):** Allows the user to select a specific instance and rerun the trigger. This is typically used if a change has been made in BrassRing and the user wants the RAM trigger to be rerun without having to undo and redo a status, remove/add a form, etc.
2. **Refresh search results:** Allows the user to get the most up to date list of RAM triggers that were run. Used most often when you are waiting for a RAM to run or when you have been on this page for an extended time and would like the most recent list.



RAM Log Statuses

Currently the RAM log has 25 statuses, broken down into 4 categories:

1. Success
2. Error
3. Warning
4. Pending

Error Statuses

Error statuses indicate that there is an issue with the configuration, data, specific workflow, or a system issue.

- When one of these errors occurs, the client should check if the error is specific to a trigger, candidate, requisition or any combination.

- The RAM log can be used to isolate where the error is occurring.
- If the error only happens for a specific candidate, you should compare with other candidate(s) that didn't result in the error. Compare the candidate's Talent record, HR status, and any forms used by the trigger.
- If the RAM trigger results in an error status that requires a PMR, please allow engineering time to review and provide more detailed information before providing the status back to the client.

Category	Description	Action / Next Step
Error	Error while processing	Unexpected error. Please create a PMR
Error	Error writing log files	Problem while saving log. very uncommon. Please create a PMR
Error	Unexpected error(s) after processing	Very uncommon. Please create a PMR
Error	Unexpected error(s) before processing	Very uncommon. Please create a PMR
Error	Error calling Webservice	Error calling an external Webservice. This is typically on the client/vendor side. The client/vendor will need to make sure their Webservice is up and running.
Error	Error after all retries	Final error after all 6 automatic retries have failed.
Error	Error setting HRstatus	Error trying to update an HR Status. Make sure this update is possible according to client set-up and requisition status. Check Client Settings "RAM - Allow HR status update for closed reqs" or "ByPass ClosedLogic when Updating HRStatus in RAM".
Error	Error sending communication	Unexpected Error while creating the communication. Try to send the same communication from BrassRing manually. Common errors are: missing token, incorrect communication template. If it is not a data issue, create a PMR.
Error	Error with WOTC	May be caused by an incorrectly configured WOTC trigger. Make sure that the fields are mapped correctly in the pre-configuration. If the error occurs to just few candidates then review the data on the candidate form that the trigger used for this specific candidate.
Error	Error with form Insert/Update	Make sure that the constraint on various fields allows copying and old form and that there were no old options that have since been inactivated. The date field must allow dates from previous years, otherwise copying from previous years will fail.
Error	Copy Form failed	Make sure that the constraint on various fields allows coping an old form and that there were no old options that have since been inactivated. The date field must allow dates from previous years, otherwise copying from previous years will fail.
Error	Candidate does not exist	
Error	Export Error	Make sure the export is setup correctly and works outside RAM.
Error	Invalid Delay	If the delay comes from a form field, make sure that the field as a valid value.

- Errors will usually be found at the end of the log after clicking on the last rule link.
- Not all errors are user friendly.
- When an error is received from another application, RAM will display that error. This example error is due to server misconfiguration.

Start trigger 90 for client [REDACTED] at 2016.05.25 11:14:16:6939**Trigger:RAM - eLinkTR token (90) started.****Context Candidate:([REDACTED]) reqid:5077 optional:474BR****Processing Rule:Rule 1(1)****Processing Rule:Rule 1(1) No Conditions (Actions)****Action:Notification**

Sending communicationBR045: eLink Talent Record token + all checked to : [REDACTED]@us.ibm.com

Send communication Failed for BR045: eLink Talent Record token + all checked to : [REDACTED]@us.ibm.com ignore Exception
 System.Exception: KEY/VALUE NOT FOUND. While retrieving configuration value for BrLogs --->
 System.NullReferenceException: Object reference not set to an instance of an object. at
 Brassring.Utilities.ConfigurationManager.AppSettings.GetKeyValue(String AppKey) in
 C:\KRBEnterpriseUtilities\EnterpriseUtilities-DEV\SourceCode\CommonComponents\Brassring.Utilities3.5

Pending Statuses

Pending Statuses are intermediate statuses, not final statuses. They should be ignored by client except if:

- The trigger, which doesn't have a delay, has been "in progress" for more than 2 hours. A PMR should be created.
- Suddenly the status is "Pending retry after error(s)" start to show for multiple. (A common issue is when the trigger contains a client integration and that integration no longer works.) A PMR should be created after the client has verified the issue is not on their side.

Category	Description	Action / Next Step
Pending	Pending retry after error(s)	Error occurred, automatic retry is pending. No action needs to be taken. The RAM will automatically retry after 1 minute, 1 hour, 6 hours, 24 hours and 48 hours. The last attempt will occur after 79 hours and 1 minute from the initial time the trigger ran.
Pending	Pending(not queued yet)	
Pending	In progress	Specific to delay processing where the trigger has a delay and will show this status until the delay is reached and the trigger runs. This is not available with other delay triggers. Another possibility is the trigger is being delayed because of backlog. (Rare)

Warning Statuses

Warning statuses are expected errors based on client configuration/set-up. Clients should review them during Staging testing and add necessary conditions or make necessary configuration changes to prevent them.

Category	Description	Action / Next Step
Warning	WOTC warning (candidate already hired)	WOTC expected error "candidate already hired" .
Warning	Warning setting HRStatus	Error that will occur if the tracking logic does not allow the update or Req close ("Bypass closed requisition check" client setting is not enabled).
Warning	Warning sending communication	Error while sending the communication. The communication was created successfully but the sending feature is failing. Review the RAM log, this could be caused by an invalid or missing email.

Warning	Export Warning	Make sure the export is setup correctly and works outside RAM
---------	----------------	---

Success Statuses

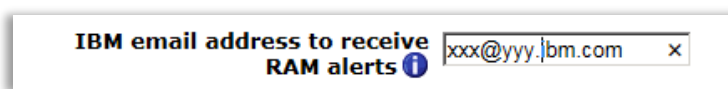
These are the statuses you want to see!

Category	Description	Action / Next Step
Success	Success with other action(s)	At least one action was taken and it was not a final action such as HR Status update, exit, run another trigger or instance.
Success	Success with exit action(s)	One of the following actions (HR Status update, exit, run another trigger or instance) were taken.
Success	Success with no action	No rule was true so no action was taken. If this happens often it could be due to the use of an incorrect trigger mechanism.
Success	Duplicate Trigger Skipped	Multiple events have triggered the same trigger multiple times for the same candidate/requisition. Only ONE will be processed and the others would be skipped. This is usually due to misconfiguration. For example, using across candidate or requisition trigger contexts. If this happens often please create a PMR. Make sure that multiple triggers are running parallel that take the same action. A lot of skipped triggers indicate issue with the design of the trigger.

- Most triggers should complete with either “Success with exit action(s)” or “Success with other actions”.
- If the client has a lot of triggers with the status of “Success with no action” or “Duplicate Trigger Skipped”, these triggers should be reviewed. They create unnecessary workload and could delay other triggers. It could also be due to incorrectly configured conditions.

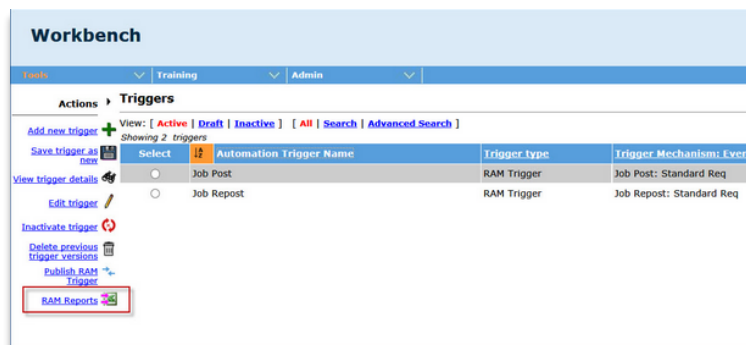
RAM Alerts

You can add your IBM contact email so he/she will receive any alerts triggered by RAM.

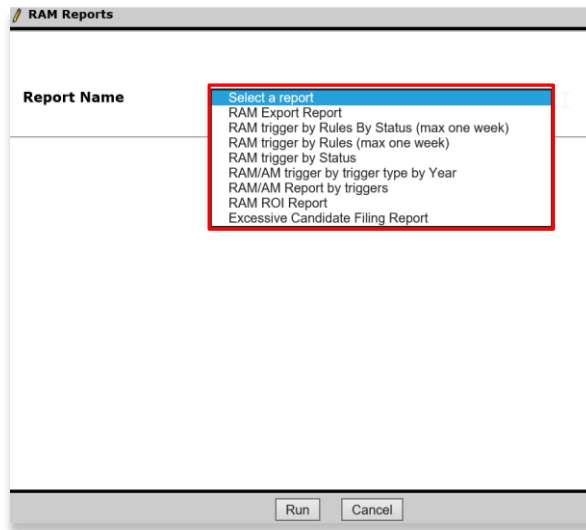


RAM Reports

RAM reports are available for the Workbench Administrator to run from **Workbench > Tools > Automation Manager > RAM Reports**.



Select a specific report from the drop-down menu for Report Name. The reports' parameters change based on the selected report.



After completing the appropriate parameters, select **Run**. The report runs and when completed displays the following:

Your RAM report has been added to the task manager.

You can now view and download the from **Tools > Task Manager**.

The complete list of reports available and details of each report are as follows:

1. RAM trigger by Rules by Status (max one week) – This report is useful to analyze the performance of RAM triggers that have run in the previous week. It is used to identify triggers that use the most resources. The fields included in the report are:
 - Client
 - Trigger Name
 - Last Rule Number
 - Number of Triggers
 - Total in seconds

2. RAM trigger by Rules (max one week) – This report is useful to analyze the rules that have been processed in the previous week. It is used to identify rules that are never true to edit or remove those rules. It can only run based on the last week. The fields included on the report are:
 - Client
 - Trigger Name
 - Last Rule Number
 - Last run Date

3. RAM trigger by Status – This report groups triggers by their statuses and is used to identify common trigger errors. The fields included on the report are:
 - Client
 - Trigger Name
 - Trigger Status
 - Trigger Type
 - Number of Triggers
 - Last run Date
4. RAM/AM trigger by trigger type per Year – This report outputs the historical data, per trigger type, per year. It is used to retrieve details on RAM/AM usage. The fields included on the report are:
 - Client
 - Trigger Name
 - Number of Triggers
 - Year
5. RAM/AM Report by triggers – This report outputs the volume of usage of RAM/AM triggers. It is used to identify RAM triggers with high or low volume, or triggers that are never used. The fields included on this report are:
 - Client
 - Trigger Name
 - Trigger Type
 - Number of Triggers
 - Last run Date

Take the following actions on triggers included in this report:

- *High Volume triggers* – Review and optimize these triggers.
- *Low Volume triggers* – Possibly inactivate or combine the triggers with other triggers to reduce the number of triggers.
- *Triggers never used* – Should be inactivated

6. RAM ROI Report – This report describes the number of triggers and rules that are processed within a set time period, up to a maximum of one year. To run this report, the time period and parameters must be configured. The report can be configured to include information about a trigger, candidate information, requisition information, or a combination of the three.

The RAM ROI fields in the report are:

- Trigger Name
- Trigger (Active)
- Trigger processed
- Rules
- Rules processed
- Time saved (seconds)
- Time saved (Days)
- Time saved (weeks/Business Working Days)
- Full-Time Employee Time Saved

- 7. Excessive Candidate Filing Report – This report provides a list and information of candidates who applied for more than a normal number of requisitions. These candidates applied to too many requisitions and increase the utilization of system resources like RAM, Forms, etc., and may bring down the system performance.

The fields on the report are:

- o Trigger Name
- o Trigger Status
- o Candidate First Name
- o Candidate Last Name
- o Candidate Reference Number
- o Auto Req ID
- o Start Date
- o End Date

- 8. Further RAM reports can be run by IBM team members to analyze client’s RAM triggers, and factor into RAM ROI calculations. These reports are not available for clients to run as they require an IBM email address on the Workbench user profile.

Currently Available RAM Reports

Report ID	Report Name
report#1	Triggers Usage past day
report#2	RAM Trigger Performance past 48 hours
report#3	Trigger by Rules past 48 hours
report#4	Triggers Errors past week
report#5	Most inefficient Trigger past 48 hours
report#6	Trigger with most Errors past 48 hours
report#7	Trigger with most Retry past 48 hours
report#8	Worst Trigger/Candidate/Req past day
report#9	Worst Candidate/Req past day
report#10	Worst Trigger/Candidate past day
report#11	RAM/AM Triggers past month
report#12	Triggers past week (excel)
report#13	Error/Warning past month(excel)
report#14	RAM/AM Historic (excel)
report#15	RAM Trigger Details (excel)
report#16	Serious Error month (excel)
report#17	Trigger by status (excel)

Tools > Automation Manager > RAM/AM Log Files

Enter:

1. Your First Name (as it appears in your WB profile) into the “First Name” field .
2. Your Last Name (as it appears in your WB profile) into the “Last Name” field.
3. The report you’d like to receive in the “Auto Req ID” field.

Retrieve RAM/AM Log Files

Trigger information

Trigger name

Status ^

Error while processing
Error writing log files
Unexpected error(s) after processing
Unexpected error(s) before processing
Error calling Webservice

Candidate information

First name

Last name

Candidate reference number

Req information

Auto Req ID

Start date End date

Example of the report received via email:

RAM/AM Triggers past month For ClientID 10001
AutomationManager to: niki.trumble

From: AutomationManager@brassring.com
To: niki.trumble@brassring.com

RAM/AM Triggers past month 10/3/2017 12:29:14 AM

ClientName	TriggerName	TriggerType	Number of Instance
	Applied_Production (Real!)1	RAM Trigger	61156
	RAM--Populate Consent Forms	RAM Trigger	53344
	RAM--Send Notification to Req Team at Review Applicant	RAM Trigger	44581
	Update Consents On Apply	RAM Trigger	42346
	HR Status = Pending Assessment_Production	RAM Trigger	30898
	Assessment Complete	RAM Trigger	30841
	WOTC Eligibility	RAM Trigger	22226
	BG Results Completed_Production 2(Real!)1_Production (Real!)1	RAM Trigger	20728

Notes/Best Practices

Trigger Frequency

RAM triggers run every minute. However, this is largely based on load at the time. Results will vary. Large number of triggers will decrease the frequencies on how often triggers run.

HR Status Action Selections

Any HR status can be selected for actions. If selecting an HR status that does not follow the Closed tracking logic, then the action fails (that is candidate is not updated). You can also choose to disobey Closed tracking logic in the RAM.

This is a client setting called RAM Disobey Closed Tracking Logic. When turned on, this allows the candidate to get updated to the HR status even when the HR status is outside of the Closed tracking logic setup.

Req Edit and Req Form Fields Modified

When you use the trigger for Req Edit followed by rules with conditions evaluating Req Form Fields Modified, configure a trigger delay of at least 30 minutes. This allows enough time for the data to be processed in order to evaluate both the old and new values.

Req and Candidate Context

The list of conditions and actions available is driven based on the trigger mechanism, trigger event, and trigger context. Sometimes, req or candidate information cannot be used since the above configured items do not have req or candidate context. As an example, the Talent-Gateway form is a multiple per candidate form not tied to a req. When using this form as the trigger, req conditions and actions are not allowed since the req is not in context. In addition, actions such as updating an HR status are not allowed, since the HR status update occurs within a req. The trigger context attribute can be used to get around this, but it may produce undesired results.

Not Equals Operation with Req Form Fields

When using the Not Equals operation with req form fields, it is important to also create a second condition to check the req template. This ensures that the Not Equals operation is evaluated correctly even when the trigger is run in the context of another req template. With 'not equal' on an optional field, you need to make sure that the field exists before checking that its value is different to another value.

Sample structure:

Rule 1

Condition for req template = A

Condition for req form fields: req template A: field X != Test

Action to send communication

Rule 2

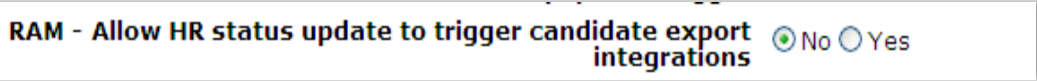
Condition for req template = B

Condition for req form fields: req template B: field X != Test

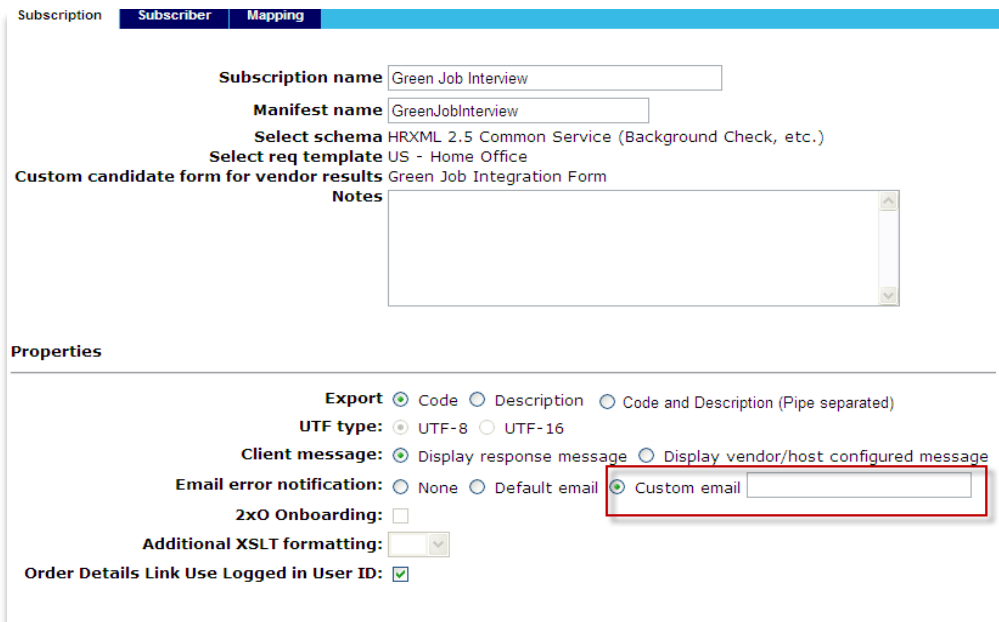
Action to send communication

Utilizing RAM to Trigger Candidate Export Integrations

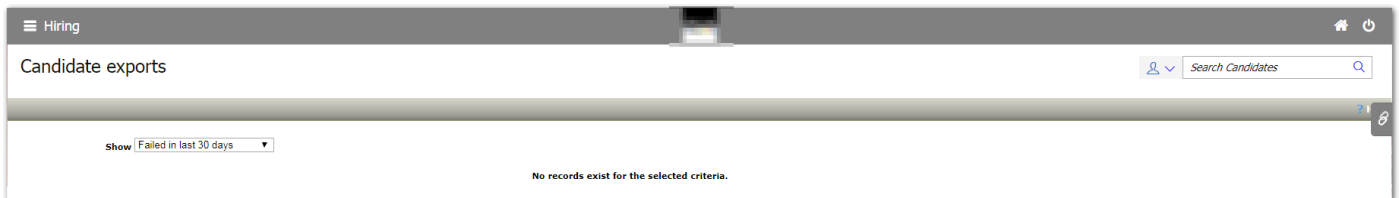
The RAM can be utilized to trigger candidate export integrations (that is New hires to HRIS, background checks, Onboard, etc.). In order to allow this, the client setting of RAM – Allow HR status update to trigger candidate export integrations must be selected as Yes. When selected, any HR status update by the RAM causes candidate exports defined for that same HR status to run. Please keep in mind that this setting is enabled for any new clients.



Error handling when using this is limited. Since the user is not involved in updating the HR status (and thus does not receive a success or failure message), there is currently only one way to report errors. Within the candidate export subscription, a static email address can be provided. All errors are sent to that email address. In addition, the emails may require a subsequent help desk ticket to determine which req and candidate the error is for (since the email only contains a transaction ID).



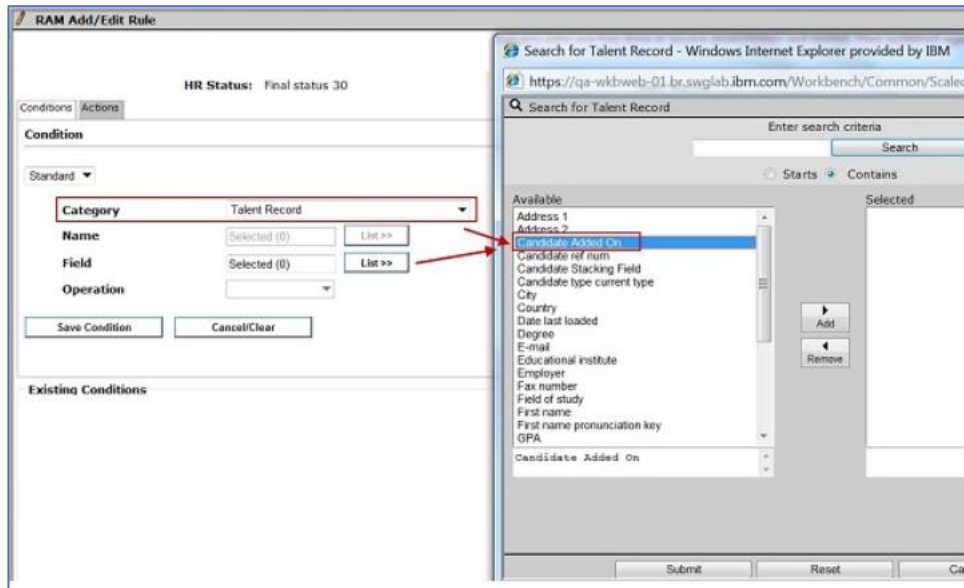
As an alternative, BrassRing users can access candidate export errors by going to Hiring > Admin > Admin+ > Candidate exports.



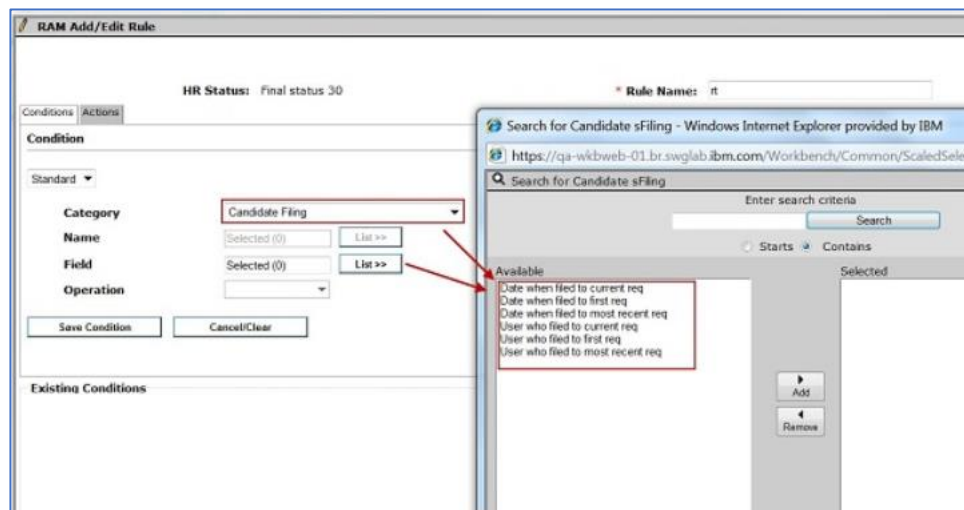
Social Referral RAM Triggers

The Social Referral RAM triggers may use the following conditions to look at when the candidate/referral was submitted. Rules Automation Manager (RAM) log allows Workbench users to troubleshoot and review RAM activity within the system.

- Candidate Added On: This condition can be used to look at when the candidate was added into BrassRing. The option is found under the Talent Record category.



- Candidate Filing: This condition can be used to look at when the candidate was filed into the BrassRing req folder. The category has 6 options to select from:
 1. Date when filed to current req
 2. Date when filed to first req
 3. Date when filed to most recent req
 4. User who filed to current req
 5. User who filed to first req
 6. User who filed to most recent req



- The Candidate Filing category is NOT be visible for the following trigger mechanisms: Req Create; Req Edit; Req Open; Req Approved; Req Declined; Req Deleted; Req Cancelled; Req On Hold; Req Pending; Req Closed; Req Subsidiary Form Approval; Req Subsidiary Form Insert; Req Subsidiary Form Insert or Update; Req Subsidiary Form Update.

The Referral candidate form can be sent using an elink in Edit mode only through RAM (though it's a multiple per candidate/multiple per candidate per req form type). This is driven by a Form level setting

called Send existing form in Edit mode. For this, the Trigger mechanism should be on the same candidate form.

Example RAMs

RAM trigger configuration from vary client by client based on process needs. Listed below are example scenarios of when you may want to consider using a specific RAM configuration.

Additional RAM triggers can be built based on client specific need, such as additional internal communications, updates to the fields on the Social Referral form based on other actions being taken, and update communications out to the employee.

Initial Ownership Established (Per Candidate)

- Rules 1 and 2 in this RAM trigger are bypassed for any candidate that has never been submitted by an employee. For candidates that have previously been referred by an employee, Rules 1 and 2 run to check if the same or different referrer has submitted the referred candidate.
- To create a RAM trigger to set the initial ownership per candidate you need to create a new Candidate Form (form type = multiple per candidate) with three fields. IBM recommends to name this form Employee_Referral_RAM_assist. The 3 fields should be:
 1. Employee ID
 2. Owns Referral (with two field options: Yes and No)
 3. Referral Expiration Date
- Triggering Mechanism: Candidate Form Insert
- Triggering Event: Employee_Referral_PC
- Delay Mechanism: Delayed Processing
- Trigger Delay (hrs): 0
- Trigger Context: None
- Rule 1:
 - Rule Name: Check for Other Owner.
 - Conditions:
 - Candidate forms:Employee_Referral_RAM_assist
 - Form Multiples - match most recent version
 - Owns Referral = (Yes)
 - Referral Expiration Date >DD (0)
 - Candidate forms:Employee_Referral_PC
 - Form Multiple - match most recent version
 - Employee ID != (Candidate forms.Employee_Referral_RAM_assist.EmployeeID)
 - Actions:
 - Populate Field Values: Candidate forms: Employee_Referral_PC
 - Form multiples - Update most recently edited form instance
 - Owns Referral = (No)
 - Form Multiples – Not applicable
- Rule 2:
 - Rule Name: Employee Owns Referral Rights.
 - Conditions:
 - Candidate forms:Employee_Referral_RAM_assist

- Form Multiples - match most recent version
 - Owns Referral = (Yes)
 - Referral Expiration Date >DD (0)
 - Candidate forms:Employee_Referral_PC
 - Form Multiple - match most recent version
 - Employee ID != (Candidate forms.Employee_Referral_RAM_assist.EmployeeID)
 - Actions:
 - Populate Field Values: Candidate forms: Employee_Referral_PC
 - Form multiples - Update most recently edited form instance
 - Owns Referral = (Yes)
 - Form Multiples – Not applicable
- Rule 3:
 - Rule Name: Setting Initial Referral Ownership.
 - Conditions: No conditions available
 - Actions:
 - Populate Field Values: Candidate forms: Employee_Referral_PC
 - Form multiples - Update most recently edited form instance
 - Owns Referral = (Yes)
 - Form Multiples – Not applicable
 - Populate Field Values: Candidate forms: Employee_Referral_RAM_assist
 - Form Multiples – Create new form instance
 - Employee ID = (Candidate forms.Employee_Referral_PC.Employee ID)
 - For Multiples – Use current form instance
 - Populate Field Values: Candidate forms: Employee_Referral_RAM_assist
 - Form Multiples – Update most recently edited form instance
 - Owns Referral – (Yes)
 - Form Multiple – Not Applicable
 - Populate Field Values: Candidate forms: Employee_Referral_RAM_assist
 - Form Multiples – Update most recently edited form instance
 - Referral Expiration Date = (Candidate forms.Employee_Referral_PC.Employee Ownership Expiration date)
 - Form Multiples – Use most recent form instance

Frequently Asked Questions

Question	Answer
What is the RAM trigger run frequency?	RAM triggers run every minute. However, this is will depend on the load on the system at the time. Results will vary.

How does the Update HR Status action work?	Any HR status can be selected for a HR Status Update action. If there is a need to update a candidate to an HR status that does not follow the Closed tracking logic, then the client setting “ByPass ClosedLogic when Updating HRStatus in RAM” will need to be enabled or the action will fail.
What is a good practice for RAMs that evaluate modified req form fields?	When you use the trigger mechanism of Req Edit followed by rules with conditions evaluating Req form fields that may have been modified, configure a trigger delay of at least 30 minutes. This allows enough time for the data to be processed in order to evaluate both the old and new values.
How do the Req and candidate context work?	The list of conditions and actions available are driven based on the trigger mechanism, trigger event, and trigger context. Sometimes req or candidate information cannot be used since the above configured items do not have req or candidate context. As an example, a multiple per candidate form not tied to a req. When using this form as the trigger, req conditions and actions are not allowed since the req is not in context. In addition, actions such as updating an HR status are not allowed, since the HR status update occurs within a req. The trigger context attribute can be used to get around this, but it may produce undesired results.
What is a good practice when using the Not Equals Operation with req form fields?	When using the Not Equals operation with req form fields, it is important to also create a second condition to check the req template. This ensures that the Not Equals operation is evaluated correctly even when the trigger is run in the context of another req template.
How can I edit the Triggering Event once the RAM is created?	Once Rules are created for the RAM the triggering mechanism cannot be edited. There are three choices: (1) Delete the entire trigger and create a new one, making sure to update the Triggering Event accordingly. (2) Delete all of the Rules, update the Triggering Event and re-add the Rules. (3) Create a new trigger and copy the rule from the old trigger before deleting the old trigger.
How can I delete a RAM trigger?	RAM triggers can only be deleted in draft mode. If the RAM has been inactivated, it has to be re-activated and then edited (to put it into draft mode). Then it can be deleted.
What if I have actions that involve form fields and are dependent on each other? Should I add them to the same rule?	Do not put actions that are dependent on each other involving form fields in the same rule. Example: Action - Update form field X to value Blue. Send communication notice to candidate where field X is a

	<p>criterion for a blurb in that communication. The form may not get updated in time to pull the correct value needed for the blurb if both are actions are in the same rule. You can't arrange the order of operations in a rule.</p> <p>Solution: Have the form update in a rule then send the communication in next rule.</p>
<p>I have attached a candidate form to a communication that is sent via a RAM trigger, but when I receive the email, the link to the form is not present. How can I fix this?</p>	<p>The Candidate Form attribute called "Send Form in Edit Mode" must be enabled. This will allow a candidate form link to be visible/clickable within your communication.</p>
<p>My RAM is failing to update the candidate's status in my Closed Reqs, what can help resolve this?</p>	<p>If you are attempting to update a candidate's status (via a RAM) in a req that is Closed, the client setting "RAM-Allow HR Status update for closed reqs" must be enabled first. This client setting will allow your RAM to update the candidate's status even through the req is in a closed status. (Please reach out to your IBM representative to enable this client setting.)</p>
<p>My RAM is failing to update the candidate's status in my Cancelled Reqs, what can help resolve this?</p>	<p>If you are attempting to update a candidate's status (via a RAM) in a req that is Cancelled, the client settings "RAM-Allow HR status update to trigger candidate export integrations" and "RAM – Allow HR Status update for closed reqs" must be enabled first. This client setting will allow your RAM to update the candidate's status even through the req is in a cancelled status. (Please reach out to your IBM representative to enable this client setting.)</p>
<p>I've created a RAM that will update my candidate to the HR status that kicks off my Background Check process. It's updating the candidate's status but not sending them to my Background Check vendor via the integration, what can help resolve this?</p>	<p>If you are attempting to update a candidate's HR Status (via a RAM) to something that would send the candidate in an integration over to your Background Check vendor, you will need the client setting "RAM-Allow HR status update to trigger candidate export integrations" enabled first. This client setting will allow RAM to update the HR status and kick off the integration. (Please reach out to your IBM representative to enable this client setting.)</p>
<p>I have inactivated/deleted a RAM trigger but my users/candidates are reporting that they are still receiving the communications and/or seeing the effects of the trigger in the BrassRing system. What is happening and how can I resolve it?</p>	<p>This is most likely being caused by a RAM trigger that had a delay configured for delay processing only. RAM triggers with delay triggering or aging will not be affected. If the RAM was triggered (but not executed) prior to inactivation/deletion, the trigger rules will still be read and the actions will still be carried out after the delay has elapsed. This will occur despite the RAM inactivation/deletion. Solution: PRIOR to inactivation/deletion, create a new first rule with no condition and an Exit Action as the action. This will stop the trigger from reading any of the subsequent rules. If</p>

	<p>the trigger has been deleted prior to adding the exit rule, submit a support ticket requesting engineering to activate the trigger again. If, when the trigger is activated again, the rules appear to be missing and there is no option to add rules, request IBM’s engineering team to use a different trigger with the exit rule to define the rules for the deleted trigger. To avoid such an issue, we recommend the use of the “Delay Triggering” and “Aging” Delay Mechanisms instead of Delay Processing.</p>
<p>Condition with date: What does the date > DD (90) mean?</p>	<p>The Date will be compared with the current date when the trigger runs +90 days. The condition will be true if the Date is more (greater) than 3 months (90 days) in the future.</p>
<p>Condition with date: What does date < DD (-90) mean?</p>	<p>The Date will be compared with the current date when the trigger runs -90 days. The condition will be true if the date is older (less) than 3 months (90 days) in the past.</p>
<p>I added a new rule and the new rule has not processed?</p>	<p>Two possible explanations: (1) Trigger status is “success with exit action” – meaning that an action that terminated/exited the trigger (such as an HR Status Update) was taken before the new rule. To resolve this, reorder the rules so the rule that has the exit action falls after other rules that you would like to run. (2) A new version of the trigger was created and, by design, older reqs will still use the older version of the trigger. To resolve this, delete the older version of the trigger so the new trigger version will be used for all reqs.</p>
<p>What is the minimum delay for a trigger?</p>	<p>Delay Processing supports delays between 0.1 hour (6 minutes) and 190 days. Delays below 0.1 hour will be ignored. If you use a delay of 0.1 hours, please take into consideration system delays and/or system maintenance. Therefore, we recommend delays of at least 1 hour. Delay Triggering or Aging supports delays of 1 hour or more (no limit).</p>
<p>On the “Update HR Status” action, what is the difference between the top two options (“Only update in other reqs (all active req templates)” and “Only update in other reqs (this req template)”) and the bottom two options (“Update across all active reqs in all req templates” and “Update across all active reqs in this req template”)?</p>	<p>The top two options (“Only update in other reqs (all active req templates)” and “Only update in other reqs (this req template)”) will only update the HR Status but will not trigger another RAM based on that HR status (if there is one set up). The bottom two options (“Update across all active reqs in all req templates” and “Update across all active reqs in this req template”) will update the HR status and will trigger another RAM based on that HR status (if there is one set up).</p>

<p>Can I select more than one HR Status as the Triggering Event for a single trigger?</p>	<p>Yes, you can select multiple HR statuses when building a RAM trigger. It is recommended that you add conditions to the various rules to look for the specific status when the rule runs. This can help reduce the number of triggers your organization may have to create.</p>
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Skipping rule to filter Candidate – if found in RAM log – means that there is no condition setup to filter candidates based on the open requisition. Usually, condition such as proximity will allow to filter candidates based on the req location. This usually indicates issues with trigger configuration or misuse of the pull trigger. The result could have significant performance impact. Example: If the trigger doesn't pull it's either because no evergreen req match the open req or no valid candidate in the selected evergreen req.

Common RAM Examples

Automated Disposition Emails

RAM can be used to automate the sending of disposition emails to candidates who are moved to a disposition status by a BrassRing user. The example would send a pre-defined email template to a candidate, 24 hours after he/she was moved into a “Company Not Interested” HR Status. There is also a condition included that states that the candidate must have a current candidate type of External, Agency, or Employee Referral. If the candidate is one of these candidate types and is still in the Company Not Interested HR Status after 24 hours, the email will be sent to the candidate.

Trigger Name:	Candidate Disposition Communication	Trigger Type:	RAM
Triggering Mechanism:	HR Status	Triggering Item:	Company Not Interested
Trigger Delay (hrs):	24	Activated On:	Not Yet Activated
Trigger Context:	NA	Delay Mechanism:	Aging

Rule 1: Company Note Interested - External - Send Disposition Communication

Conditions:

- Standard
- Talent Record Form Multiples - Not Applicable
- Candidate type current type = (External, Agency)

Actions:

- Send Communication

[View Details](#)

Send Communication	
Locale	Template
English - United States	Disposition Notification (External Candidate)
Recipients	
[Talent record]:E-mail	
Include old and new values for req form fields modified	
No	

How to Read/Create this RAM

- **Trigger Name:** Displays the name of this trigger. The name can be used when troubleshooting in the RAM logs and submitting support tickets. There is no required format however we recommend that you keep a consistent naming convention and always make sure your Staging and Production RAM trigger names match.
- **Triggering Mechanism:** Select “HR Status”. This will be the overall mechanism to trigger the RAM.
- **Triggering Item:** HR Status of “Company Not Interested. This is the actual HR status that triggers this RAM. Your organization may have a different HR Status for the dispositioning of candidates. If you do not see your HR Status in the list, it means that you are already using the HR Status for another trigger. In this case, you will want to add a rule to the other trigger to accomplish the goal.
- **Delay Mechanism:** Select “Delayed Triggering”. This option waits for the delay time to elapse after the event has occurred and then fires the trigger. Thus, the trigger will be fired and executed at the same time. (Trigger event happens > delay elapses > trigger fires > trigger is executed - rules are run.) Delays are optional.
- **Trigger Delay (hrs)** = We have a 24-hour delay built into our example trigger. This means that 24 hours following the HR status update by the BrassRing end user the RAM will run and will send the disposition email if the conditions are met. Your organization may choose to implement a shorter or longer delay depending on process. Delays are optional.

Rule 1: Name the first Rule. We have named ours “External Candidate Disposition Communication”. The name can be used when troubleshooting in the RAM logs and submitting support tickets. (Multiple rules can be configured with different conditions to take different actions).

Conditions: If these conditions are met the RAM will run the action. Our only condition is that the candidate must have a current candidate type of External OR Agency OR Employee Referral. We do this because that communication can be standardized/automated and it allows our BrassRing users to send a customized message to our Internal candidates. To do this select Talent Record > Candidate Type > Equals External, Agency, Employee Referral.

Actions: Our Send Communication action allows you to select who gets the communication/email. In this case we will select the candidate Talent Record Email so the system will send the disposition email to the candidate’s contact email address.

Automated Disposition of Candidates (once a candidate is hired) and Unposting/Closing of the Requisition

A RAM can be configured to disposition all candidates (not yet in a final disposition status), add a disposition form, and send a disposition email when a candidate is Hired to a requisition. The same RAM can also unpost and close the requisition. Note: For this RAM to work properly, the client setting “ByPass ClosedLogic when Updating HRStatus in RAM” must be enabled. Please reach out to your IBM representative to have this enabled if it is not already.

Trigger Name:	HR Status (Hired)	Trigger Type:	RAM
Triggering Mechanism:	HR Status Req Options	Triggering Item:	Hired
Trigger Delay (hrs):	1	Activated On:	Not Yet Activated
Trigger Context:	Run trigger across candidates	Delay Mechanism:	Delayed Triggering

Rule 1: Unpost and Close Req

Conditions: No conditions available

Actions:

- Unpost and Close Req
- Unpost and Close Req

Rule 2: Disposition Remaining Candidates and Send Dispo Comm

Conditions:

- Standard
- HR Status
- Form Multiples - Not Applicable
- HR Status = (0-filed, 1st Interview..) [View All Values](#)

Actions:

- Send Communication
 - [View Details](#)
- Populate Field Values: Candidate forms: Disposition Form
- Form Multiples - Not Applicable
 - Disposition Reason = (More qualified candidate hired)
 - Form Multiples - Not Applicable
- Update HR Status
 - HR Status = (Company Not Interested)

How to Read/Create this RAM

- **Trigger Name:** Displays the name of this trigger. The name can be used when troubleshooting in the RAM logs and submitting support tickets. There is no required format however we recommend that you keep a consistent naming convention and always make sure your Staging and Production RAM trigger names match.
- **Triggering Mechanism:** Select “HR Status Req Options”. The status update triggers the RAM and when req options is selected as the mechanism it allows the RAM to run the trigger across candidates in the req.
- **Triggering item:** HR Status of “Hired”. This is the actual HR status that triggers this RAM. Your organization may have a different HR Status for the final ‘hiring’ status for the candidates. If you do not see your HR Status in the list, it means that you are already using the HR Status for another trigger.
- **Trigger delay(hrs):** We have a 10 minute (.10 hrs) delay built into our example trigger. This means that 10 minutes after the candidate is moved to the HR status of Hired update by the BrassRing end user the RAM will run and will take the action(s) if the conditions are met. Your organization may choose to implement a shorter or longer delay depending on process. Delays are optional.

Rule 1: We have named ours “Unpost and Close Req”. The name can be used when troubleshooting in the RAM logs and submitting support tickets. (Multiple rules can be configured with different conditions to take different actions).
Condition: No condition has been configured for this Rule. (Having a condition is not always necessary.)
Action: Select the “Unpost and Close Req” action. (The RAM will close and unpost the req that the candidate is Hired for.)

Rule 2: We have named ours “Disposition Remaining Candidates and Send Disposition Communication”. The name can be used when troubleshooting in the RAM logs and submitting support tickets.
Condition: Select the HR Statuses that are considered your non-final/intermediate statuses. The RAM will look and take action only on candidates that are currently in these statuses. Additional conditions can be added as necessary.

Actions:

- Select “Send Communication”. In this case we will select the candidate Talent Record Email so the system will send the disposition email to the candidate’s contact email address.
- If your organization uses disposition forms, you can have the RAM trigger create/populate the disposition form. Select the name of the Disposition form and the field(s) you would like to populate. In this case, our form is called Disposition Form and we are populating the field of Disposition Category with the value of “Company Not Interested”.
- Select “Update HR Status”. In this case we will update all non-hired candidates (still in an intermediate status) to a status of “Company Not Interested”.

Candidate Accepts/Declines Offer

A RAM can be configured to notify the Recruiter, Manager, or other BrassRing users when a candidate accepts or declines and Offer made through our candidate portal. This RAM can also update the candidate’s HR status appropriately.

Trigger Name:	Offer Response	Trigger Type:	RAM
Triggering Mechanism:	Document Subsidiary Form Insert or Update	Triggering Item:	Offer_Response_Form
Trigger Delay (hrs):	0	Activated On:	19 May 2016
Trigger Context:	NA	Delay Mechanism:	Delayed Processing

Rule 1: Offer Accepted

Conditions:

Document subsidiary forms:Offer_Response_Form
Form Multiples - Match most recent version for this req

Employment Offer Decision: = (I accept this offer of employment)

Actions:

Send Communication

[View Details](#)

Update HR Status

HR Status = (Offer Accepted)

Rule 2: Offer Declined

Conditions:

Document subsidiary forms:Offer_Response_Form
Form Multiples - Match most recent version for this req

Employment Offer Decision: = (I decline this offer of employment)

Actions:

Send Communication

[View Details](#)

Update HR Status

HR Status = (Offer Declined)

How to Create/Read this RAM

- **Trigger Name:** Displays the name of this trigger. The name can be used when troubleshooting in the RAM logs and submitting support tickets. There is no required format however we recommend that you keep a consistent naming convention and always make sure your Staging and Production RAM trigger names match.
- **Triggering Mechanism:** Select “Document Subsidiary Form Insert or Update”. The insert or update of the selected doc sub form will trigger the RAM to run.
- **Triggering item:** Select the appropriate Document Subsidiary form. In our case it is called Offer Response Form. (This is the actual form that will trigger the RAM. Your organization may have named the doc sub form differently).
- **Trigger delay (hrs):** We will not have a delay associated with this trigger. (Delays are optional).

Rule 1: We have named ours “Offer Accepted”. The name can be used when troubleshooting in the RAM logs and submitting support tickets. (Multiple rules can be configured with different conditions to take different actions).

Condition: For this condition we will select the “Offer Response” doc sub form and select the Employment Offer Decision of “I accept this offer of employment”. (When the candidate accepts the offer, the condition is met and the trigger will run the actions.)

Actions:

- Select “Send Notification” to the Recruiter that the candidate has accepted the offer.
- Select “Update HR Status”. In this case we will update this candidate to a status of “Offer Accepted”.

Rule 2: We have named ours “Offer Declined”. The name can be used when troubleshooting in the RAM logs and submitting support tickets. (Multiple rules can be configured with different conditions to take different actions).

Condition: For this condition we will select the “Offer Response” doc sub form and select the Employment Offer Decision of “I decline this offer of employment”. (When the candidate declines the offer, the condition is met and the trigger will run the actions.)

Actions:

- Select “Send Notification” to the Recruiter that the candidate has declined the offer.
- Select “Update HR Status”. In this case we will update this candidate to a status of “Offer Declined”.

Assessment/Background/Interview Result Update

One common example is where the client would like to update the HR status of the candidate based on results of an assessment, background check, or interview. If the result is captured on a form, this is an easy trigger to set up and execute. For Background check, make sure that results are not sent back over and over for the same candidate or req. If this is the case, then use the delay triggering to limit the number of time it will trigger a RAM to run.

Trigger mechanism: Candidate form insert or update

Trigger event: Background check results form (or other applicable form)

Rule 1

Conditions	Actions
Results form, Overall results field = Pass Req template = US salary <i>Match form version for this req</i>	Update HR status to Passed Background Check

Note: For assessment you should only use the KAS Overhall form and not the KAS Assessment form.

Rule 2

Conditions	Actions
Result form, overall results field = Fail Req template = US salary <i>Match form version for this req</i>	Update HR status to Failed Background Check

Eligibility Check

Another common example among retail and high-volume clients is where the client would like to conduct a series of eligibility checks prior to the candidate getting into the req. If they fail one of these checks, they are automatically dispositioned, resulting in an applicant pool which consists of candidates who are all eligible. All eligibility checks that are not req specific should be completed on the evergreen req and non-eligible candidates should be dispositioned.

Trigger mechanism: HR status

Trigger event: Pending eligibility check status

NOTE: This status would usually be hidden from recruiters and hiring managers.

Rule 1

Conditions	Actions
Disposition form reason = Failed drug screen Disposition form date greater than -365 days (means date is within 365 days of today) Candidate type = External <i>Match any form version across reqs</i>	Update HR status to Failed Eligibility

Rule 2

Conditions	Actions
Disposition form reason = Failed background check Disposition form date greater than -365 days (means date is within 365 days of today) Candidate type = External <i>Match any form version across reqs</i>	Update HR status to Failed Eligibility

Rule 3

Conditions	Actions
Disposition form reason = Failed interview Disposition form date greater than -365 days (means date is within 365 days of today) Candidate type = External <i>Match any form version across reqs</i>	Update HR status to Failed Eligibility

Rule 4

Conditions	Actions
Internal eligibility form = Previous poor performance Candidate type = Internal <i>Match any form version across reqs</i>	Update HR status to Internal Failed Eligibility


Rule 5

Conditions	Actions
None	Update HR status to Passed Eligibility <i>NOTE: This status would usually be visible to recruiters and hiring managers</i>

Evergreen Pull Candidates

When using the evergreen pull candidate feature you cannot use standard reqs and must use a specific evergreen req. A common evergreen pull example is where the client would like to open a hiring req (store and position specific) when a hire is actually needed. In order to get qualified candidates more quickly into the hiring req, it pulls candidates that are sitting in existing evergreen reqs. Candidates are usually matched based on location preferences and position type preferences. Those candidates that meet the criteria are pulled into the hiring req, and would be considered hireable for the newly opened job. Identification of the candidates is done by 3 layers of conditions. You should also setup an archive to candidates get dispositioned after a certain time. Otherwise the number of candidates will continue to increase in the evergreen req which could result in performance issues.

This trigger is very complex to setup; therefore, please consult with your IBM representative before starting any work on the trigger.



Note: RAM will only pull the first 1,000 candidates.

1. Filtering for evergreen reqs to identify the starting set of evergreen reqs to look at
2. Matching those evergreen reqs to the hiring req based on req field value comparisons
3. Matching values input by the candidate (on candidate form fields) to the req field values of hiring reqs

The RAM can automate this entire process.

- Trigger mechanism: Req open
- Trigger event: Stores req template
- Trigger context: Run trigger to pull candidates

Note: A drop down in the top left of the conditions tab is critical for this trigger. It has options for Standard and Evergreen. This selection allows defining whether the condition being added is tied to evaluating evergreen reqs or evaluating the hiring (target) req – aka the req in context. This is provided since conditions are needed for both evergreen and hiring reqs. Appropriate selection is indicated in the conditions grid below.

After the conditions are evaluated for this type of trigger, if there are more than 1000 candidates, then only the first 1000 are chosen based on Date filed to folder.

Rule 1

Conditions	Actions
Top left drop down is Evergreen: Evergreen req field is Yes	Copy/Move
Top left drop down is Standard: Req field "Pull candidates" is Yes	Copy/move: select appropriately
Top left drop down is Evergreen: Evergreen req field "Location" compared to hiring req field "Location"	Retain HR status selection: select appropriately
Top left drop down is Standard: Candidate form field "Position Type" compared to hiring req field "Position Type"	HR status: select HR status candidate should go to in destination req
	Candidate forms to copy: select per req forms to copy into destination req
	Note: No selection necessary for req selection category, name, and field since the req that triggered the RAM is the destination req for the copy/move.

Do not use Evergreen trigger if a candidate is eligible. If the candidate failed the assessment, the candidate should not be part of the req. They should be dispositioned. You should only keep in the Evergreen Req those candidates who passed the Assessment.

Evergreen Push Candidates

If there is a need for a push trigger, make sure that reqs are closed as soon as they are filled. Otherwise, push triggers will continue to file candidates to these reqs which will result in performance issues over time. A common evergreen push example is where the client would like to push candidates to open hiring reqs (store and position specific) as they apply to evergreen reqs. This has the effect of the candidate applying to one or more broader evergreen reqs, and then immediately getting copied or moved into matching hiring reqs that are open at the time the candidate applies. Candidates are usually matched based on location preferences and position type preferences. Identification of the req(s) to copy or move the candidate to is evaluated by 2 layers of conditions.

1. Matching values input by the candidate (on candidate form fields) to req field values of any open hiring reqs
2. Matching values on evergreen req fields to field values on any open hiring reqs

The RAM can automate this entire process.

- Trigger mechanism: HR status
- Trigger event: Eligible for Evergreen
- Trigger context: NA

Note: For candidate form comparisons, left side should select the req field to compare; right side of the comparison is the candidate form field.

You can save multiple action-conditions to apply more than one filter for identifying the hiring req(s) to copy/move the candidate to. The logic uses AND (same as in condition setup).

For subsequent action-conditions (more than 1), the copy/move, retain HR status data, HR status, and candidate forms to copy selections are disabled. These settings as configured in the first action-condition are used. When editing any action-condition, changing one of these settings changes it for all action-conditions within that rule. A move to req action and an HR status update are not be allowed within the same rule.

Rule 1

Conditions	Actions
<p>Add conditions where necessary to only run the trigger if the candidate meets certain criteria (that is Candidate eligible = Yes) (Note: If push happens after eligibility then this condition is not required)</p>	<p>Copy/Move</p> <p>Copy/move: select appropriately</p> <p>Retain HR status selection: select appropriately</p> <p>HR status: select HR status candidate should go to in destination req</p> <p>Candidate forms to copy: select per req forms to copy into destination req</p> <p>Req selection category, name, field, operation, and value: select appropriate filtering to identify hiring req(s)</p>

Automation Manager (AM) Trigger Conversions

Over the last year, Automation Manager triggers have been retired as RAM triggers can be built to replace them. RAM triggers offer multiple benefits over AM triggers such as log details, email alerts, retry logic, and better proactive monitoring. The information below shows how you can create a RAM trigger comparable to what was previously available in Automation Manager.

Each section includes the following information:

- The name of the retired Automation Manager Trigger.
- A screenshot example of what the Automation Manager Trigger used to look like.
- An example of how to create a RAM Trigger comparable to the retired Automation Manager Trigger.
- A screenshot of the example RAM Trigger.
- A summary of how to read the RAM Trigger.
- Examples of additional conditions to add to the RAM Trigger.

AM Trigger: Update HR Status Across all Reqs for Candidate in Final Status

AM Trigger Definition: This Automation Manager trigger used to automatically update a candidate(s) to a designated final status across all Open or On Hold requisitions they were filed to, once they are updated to a Hired status. This ensured that all impacted req team members working with the candidate realize they should no longer be considered for a position. The trigger would run on an hourly basis. Notifications would also be sent to configured recipients when the trigger updates any candidate(s) they are working with.

AM Trigger Screenshot Example:

The screenshot shows the 'Configure Notification' tab with the following configuration:

- Set candidate criteria required to activate trigger**
 - *Set trigger for selected HR Status: Selected (1) [Select >>] (Typically this is the Hired status)
 - *Select Candidate Types: All, Select Candidate type [Selected (0) Select >>]
- Trigger will apply to Reqs with matching criteria**
 - *Set trigger for Req Templates: All, Select templates
 - Candidate Tiering Req Form
 - Evergreen Req Form
 - Standard Req Form (Smart Approval)
 - Standard Req Form (Standard Approval)
 - Set trigger for Req field: Selected (0) [Select >>]
 - Select field options: Selected (0) [Select >>]
- Update candidate(s) to selected HR Status**
 - *Select HR Status: Selected (1) [Select >>] (Typically this is a non-hired final status)

Buttons: Save, Cancel

The screenshot shows the 'Configure Notification' tab with the following configuration:

- * Select notification template:**

Language	Template	
<input checked="" type="checkbox"/> *English - United States	[Auto] Candidate Hired for Other Req	[Preview]
<input type="checkbox"/> Spanish - Spain	None	[Preview]
<input type="checkbox"/> Spanish - Spain (informal)	None	[Preview]
- * Select recipients**
 - Candidate Recruiter Hiring Manager
 - Req Team Approvers
 - Select system users: [Selected (0) Select >>]
 - Users selected in form fields ? [Selected (0) Select >>]

Creating a RAM Trigger comparable to this Automation Manager Trigger Type:

Triggering Mechanism	HR Status Req Options
Triggering Event	Hired (or another Final 'hired' Status)
Delay Mechanism	Delay Triggering
Trigger Delay (hrs)	1
Trigger Context	Run trigger across reqs

<p>Rule 1</p>	<p><i>This rule will update the candidate that was hired to a final/disposition status across the other reqs they applied to. (Checking if the candidate is in a start/intermediate status for the other reqs, and checking if the req is in an Open status.)</i></p> <p>Conditions:</p> <ul style="list-style-type: none"> - HR Status = select all start/intermediate statuses - Req Status = Open <p>Actions:</p> <ul style="list-style-type: none"> - Send Communication to the Req team (AM forced a communication to be sent – RAM has the flexibility to not send.) - Update HR Status to your designated HR Status (for example: “Hired to Another Req”). Select “Update across all active reqs in all req templates”.
<p>Rule 2</p>	<p><i>This rule will update the candidate that was hired to a final/disposition status across the other reqs they applied to. (Checking if the candidate is in a start/intermediate status for the other reqs, and checking if the req is in an On Hold status.)</i></p> <p>Conditions:</p> <ul style="list-style-type: none"> - HR Status = select all start/intermediate statuses - Req Status = On Hold <p>Actions:</p> <ul style="list-style-type: none"> - Send Communication to the Req team • (AM forced a communication to be sent – RAM has the flexibility to not send.) - Update HR Status to your designated HR Status (for example: “Hired to Another Req”). Select “Update across all active reqs in all req templates”.

RAM Story (Example):

In the example RAM, a candidate has applied to req A, req B, and req C. The candidate is moved to a Hired status for req A. This candidate is still active in the recruitment process for the other reqs (still in intermediate statuses). Once the candidate is moved to a Hired status for req A, RAM will run and review the candidate against Rule 1. If the candidate is in one of the defined intermediate HR statuses for req B or C, and the Req Status is Open, the RAM will send a communication to the req team for reqs B and/or C, and then update the candidate’s HR status to “Hired to Another Req”. If the candidate did not meet the conditions for Rule 1, Rule 2 will run. If the candidate is in one of the defined intermediate HR statuses for req B or C, and the Req Status is On Hold, the RAM will send a communication to the req team for reqs B and/or C, and then update the candidate’s HR status to “Hired to Another Req”.

RAM Screenshot Example:

Rules Automation Manager

Trigger Name:	HR Status (Hired)	Trigger Type:	RAM
Triggering Mechanism:	HR Status Req Options	Triggering Item:	Hired
Trigger Delay (hrs):	1	Activated On:	26 Jan 2017
Trigger Context:	Run trigger across reqs	Delay Mechanism:	Delayed Triggering

Rule 1: Dispo Hired Candidate Across Open Reqs

Conditions:

Standard
HR Status
Form Multiples - Not Applicable
HR Status = (0-filed, Additional Interviews...) [View All Values](#)

Standard
Req status
Form Multiples - Not Applicable
Req status = (Open, Open...) [View All Values](#)

Actions:

Send Communication
[View Details](#)

Update HR Status
HR Status = (Hired to Another Req) Update across all active reqs in all req templates

Rule 2: Dispo Hired Candidate Across On Hold Reqs

Conditions:

Standard
HR Status
Form Multiples - Not Applicable
HR Status = (0-filed, Additional Interviews...) [View All Values](#)

Standard
Req status
Form Multiples - Not Applicable
Req status = (Open, Open...) [View All Values](#)

Actions:

Send Communication
[View Details](#)

Update HR Status
HR Status = (Hired to Another Req) Update across all active reqs in all req templates

Additional conditions/actions that can be added to the Rule(s) of your RAM:

- Checking for a specific Candidate Type.
- Checking for the req to be created with a specific Req Template.
- Checking for specific req form field options to be selected.
- Checking for specific candidate form field options to be selected.
- Send a communication to the candidate for the other reqs they are dispositioned against.
- Populate a disposition form on the candidate's Talent Record.

AM Trigger: Candidate HR Status – send Talent Record

AM Trigger Definition: This notification trigger used to send a candidate's Talent Record to designated internal user(s) based on a change to a configured HR Status. The trigger used existing eLink functionality and was configured to include forms to view or complete. This trigger ran daily at regular intervals throughout the day, at least once/hour.

AM Trigger Screenshot Example:

The screenshot shows the 'Configure Notification' tab with the following configuration options:

- *Select HR Status:** A dropdown menu showing 'Selected (1)' and a 'Select >>' button.
- *Select Candidate Types:** Radio buttons for 'All' (selected) and 'Select Candidate type'. Below is a dropdown menu showing 'Selected (0)' and a 'Select >>' button.
- *Set trigger for Req Templates:** Radio buttons for 'All' (selected) and 'Select templates'. Below is a dropdown menu listing: Evergreen Req, Executive Req, Global Req, Retail Req, and US Req Form.

At the bottom of the window are 'Save' and 'Cancel' buttons.

The screenshot shows the 'Configure Notification' tab with the following configuration options:

- * Select notification template:** A table with columns 'Language' and 'Template'. The first row is selected: English - United States and Hiring Manager Feedback Form. A 'Preview' button is to the right.
- * Select recipients:** Checkboxes for Candidate, Recruiter, Hiring Manager, Req Team, and Approvers. 'Hiring Manager' is checked. Below is a 'Select system users' dropdown showing 'Selected (0)' and a 'Select >>' button. There is also a checkbox for 'Users selected in form fields' with a 'Select >>' button.
- Include HR Status:** A checkbox that is currently unchecked.
- Include forms to complete:** A dropdown menu listing: Addendum, Authorization to Hire, Background Check Request, Background Check Form, and 503 Disability Self-ID.
- Include forms to view:** A dropdown menu listing: Addendum, Authorization to Hire, Background Check Request, Background Check Form, and 503 Disability Self-ID.
- Notify recruiter when forms have been submitted:** A checkbox that is currently unchecked.

At the bottom of the window are 'Save' and 'Cancel' buttons.

Creating a Communication Template that will be used in the RAM Trigger (Example below):

Select the forms, do not add tokens into the body of the message.

*Template name [Auto] Talent Record for Review

To e-mail address Add

E-mail subject line Candidate's Talent Record for Your Review

Return e-mail address (optional)

Added by: Support (shaley), BrassRing ()
 Added on: 03-Mar-2016
 Last edited by: Support (ntrumble), BrassRing ()
 Edited on: 27-Jan-2017

*MESSAGE BODY

Top/Bottom margin: None
 Left/Right margin: None

HTML Plain text

Format Font Size

Source

Hello [#RequisitionStd_Manager#]

A candidate that you may be interested in, [#Contact1-info_FirstName#] [#Contact1-info_LastName#], has applied to your open requisition [#RequisitionStd_AutoReqId#] [#RequisitionStd_Title#]. Click on the candidate's name below to view their resume and other information s/he provided. When you complete your review of the candidate, please provide your feedback on the Hiring Manager Feedback form.

[\[#eLinks_TalentRecord#\]](#)

Sincerely,

Merge fields

Select variable group

<< Add

<< Add numeric field with formatting

<< Add date field with formatting

<< Add additional user information

Link to job(s) on Gateway

Select a Gateway

<< Add

[#RequisitionStd_Recruiter#]

Insert blurb

Upload attachments

Choose Files No file chosen Upload

File	File size	Delete
No attached files		

Include forms to complete

- Hire Form
- HireVue Video Interviewing Res
- Hiring Manager Feedback Form**
- Internal Gateway Questionnaire
- Interview Builder Results
- Interview Evaluation Form

<< Add

<< Add URL

Include forms to view

- Disposition Form
- EEO Form
- Event Manager Candidate Info
- Event Manager Result Form
- External Gateway Questionnaire
- Hire Form

<< Add

<< Add URL

Add Talent Record eLinks

- Include notes
- Include HR status
- Include attachments
- Include Doc sub forms

Org groups authorized to send this template:

Retail Standard

Org groups authorized to administer this template:

Retail Standard

Active template

Yes No

Template type

E-mail

Agency

Yes No

Sending method

Manual Send

Auto Send

Auto and Manual Send

Save copy of correspondence

Yes No

* = required field

Save Revert To Saved Cancel

Creating a RAM Trigger comparable to this Automation Manager Trigger Type:

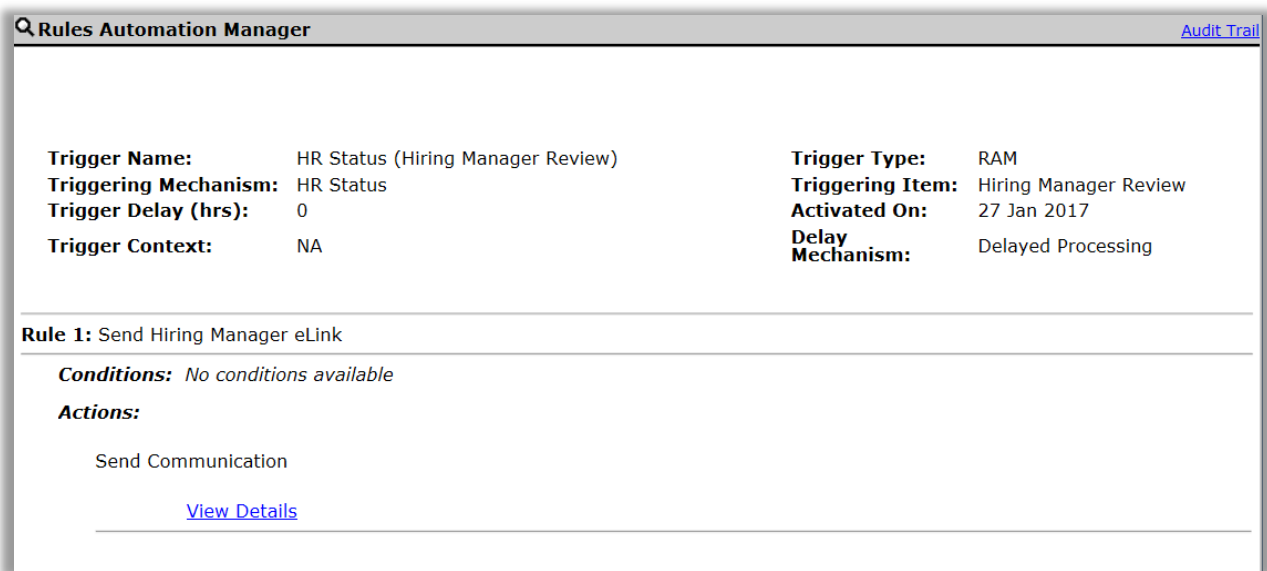
Triggering Mechanism	HR Status
Triggering Event	Hiring Manager Review (or another HR Status that will kick off the email, including the Talent Record of the candidate)
Delay Mechanism	Delayed Processing
Trigger Delay (hrs)	0
Trigger Context	NA
Rule 1	<i>This rule will send an email to the user of your choice. The email will contain a link to the</i>

	<p><i>candidate’s Talent Record and any forms you’ve indicated to complete/view.</i></p> <p>Conditions: None</p> <p>Actions:</p> <ul style="list-style-type: none"> - Send Communication to the user of your choice
--	---

RAM Story (Example):

In the RAM example, the desired action is to send a candidate’s Talent Record to the Hiring Manager when they are moved to “Hiring Manager Review”, so the Manager can review the candidate’s information and provide feedback. Once the candidate is moved to a “Hiring Manager Review” HR status, Rule 1 runs. Since there are no conditions, the action is taken to send an email to the Hiring Manager selected on the req.

RAM Screenshot (Example):



Additional conditions/actions that can be added to the Rule(s) of your RAM:

- Checking for a specific Candidate Type.
- Checking for the req to be created with a specific Req Template.
- Another RAM trigger to notify the Recruiter when the form(s) are completed.

AM Trigger: HR Status Update – Notify Candidate

AM Trigger Definition: This notification trigger sent the candidate an e-mail message based on changes to their HR Status within a req folder. This trigger’s notification was configured within the BrassRing communications template module with all existing e-mail merge fields available. This trigger ran daily at regular intervals throughout the day, at least once/hour.

AM Trigger Screenshot Example:

The screenshot shows the 'Configure Notification' tab with the following settings:

- *Select HR Status:** Selected (1) [Select >>]
- *Select Candidate Types:** All, Select Candidate type. Selected (0) [Select >>]
- *Set trigger for Req Templates:** All, Select templates. A list box contains 'Corporate' and 'Retail'.
- Form Field:** Selected (0) [Select >>]
- Field Options:** Selected (0) [Select >>]

Buttons at the bottom: Save, Cancel.

The screenshot shows the 'Configure Notification' tab with the following settings:

- * Select notification template:** A table with columns 'Language' and 'Template'. The first row is checked: *English - United States | Newhire. A 'Preview' button is to the right.
- * Select recipients:**
 - Candidate, Recruiter, Hiring Manager
 - Req Team, Approvers
 - Select system users: Selected (1) [Select >>]
 - Users selected in form fields ? Selected (0) [Select >>]

Buttons at the bottom: Save, Cancel.

Creating a RAM Trigger comparable to this Automation Manager Trigger Type:

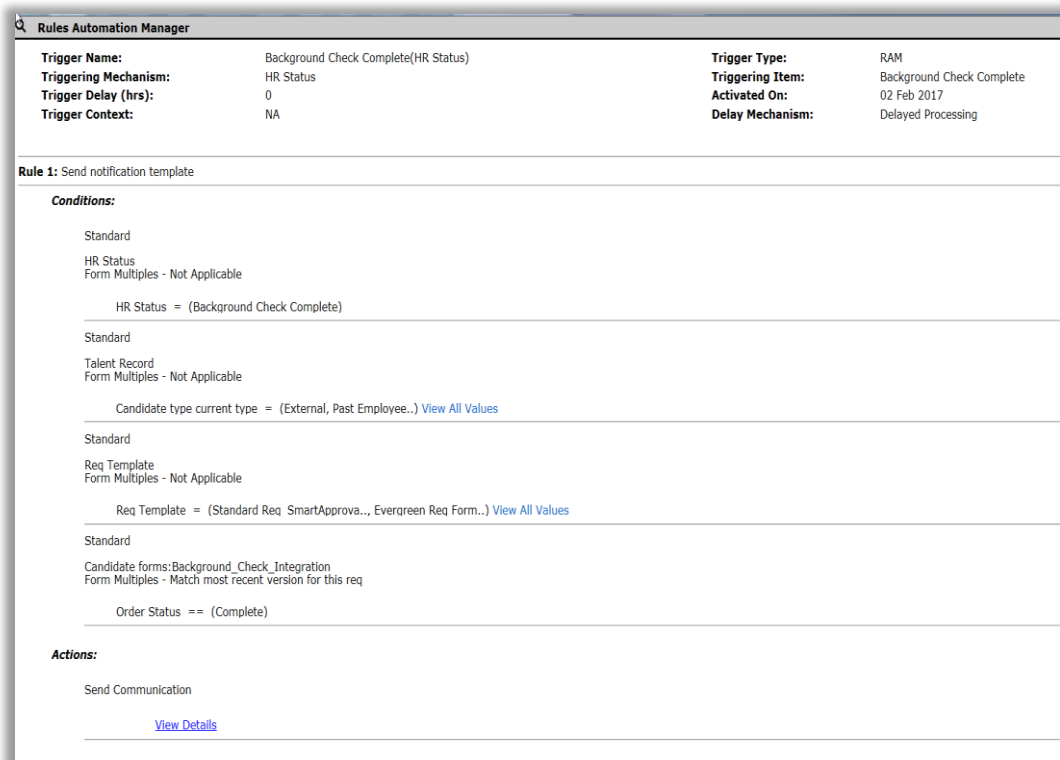
Triggering Mechanism	HR Status
Triggering Event	Background Check Complete
Delay Mechanism	Delay Triggering
Trigger Delay (hrs)	1 (values in 1 hour increments can be used) to add a delay in the trigger running
Trigger Context	NA
Rule 1	<i>This rule will send a notification email to the selected users informing that the background check is complete when the HR status is updated to Background check complete.</i>

	<p>Conditions:</p> <ul style="list-style-type: none"> - HR Status = select desired HR status/in this case Background Check complete - Candidate Type = select the applicable candidate types for the trigger condition logic - Req template = select the applicable req templates for the trigger condition logic - Form field Value = select the applicable form field value for the trigger condition logic <p>Actions:</p> <ul style="list-style-type: none"> - Send Communication to the selected recipient(s)
--	--

RAM Story (Example):

In the RAM example, the desired action is to send an email to a defined user when they are moved to “Background Check Complete”, so the user is informed of the status change and can take additional actions in external systems if necessary. Once the candidate is moved to a “Background Check Complete” HR status, Rule 1 runs. If the candidate is in the defined HR Status, has the defined candidate type, has been moved to this status on a req created with a specific req template, and has specific field data filled out, the Rule will complete the action. The RAM’s action will send out a communication to a defined user that the Background Check has been completed.

RAM Screenshot (Example):



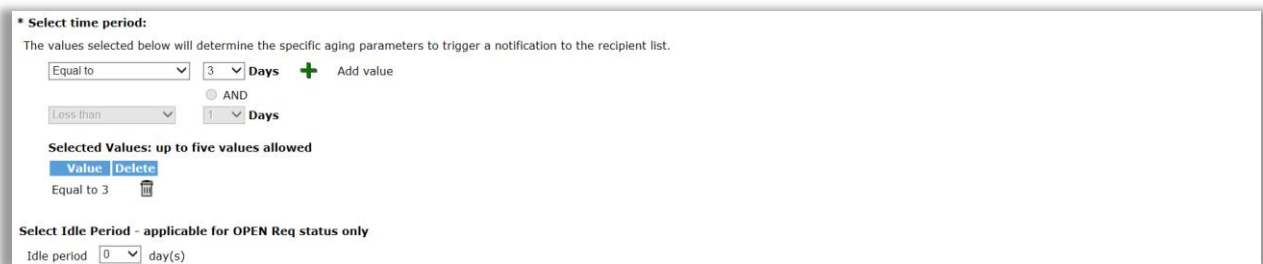
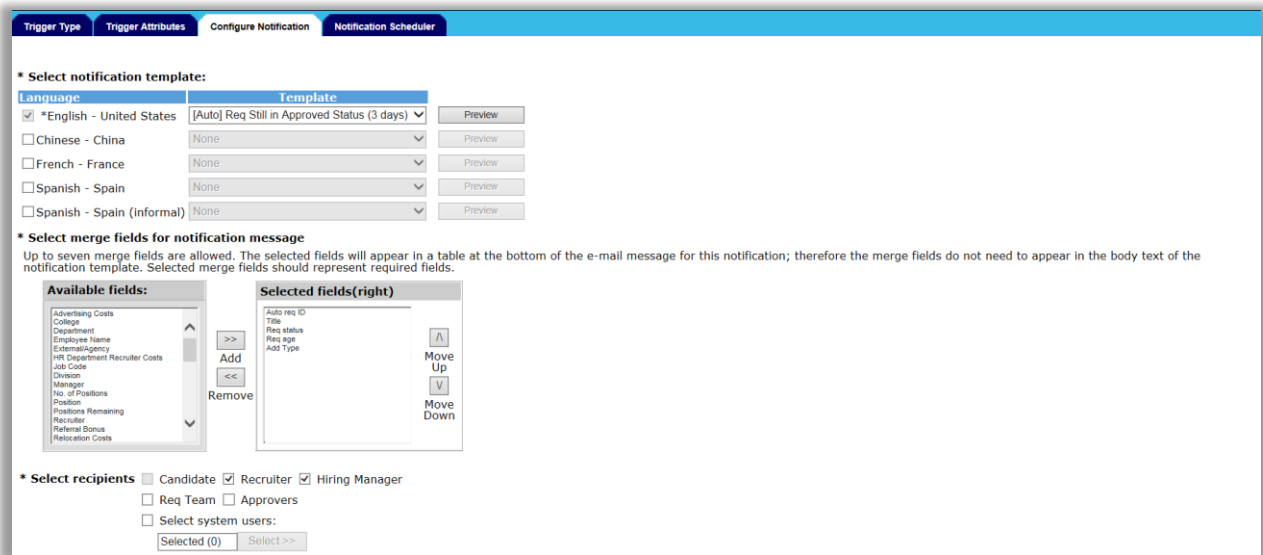
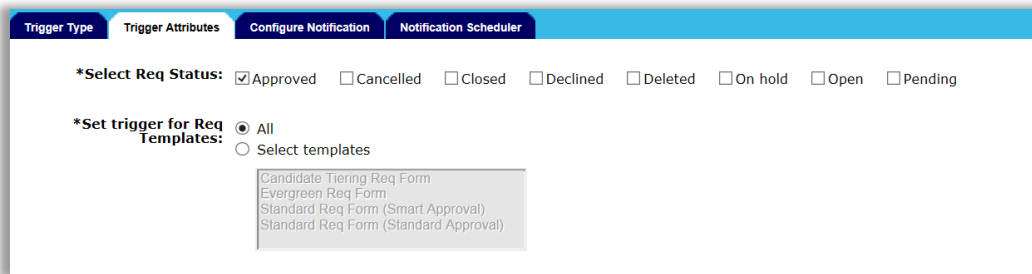
Additional conditions/actions that can be added to the Rule(s) of your RAM:

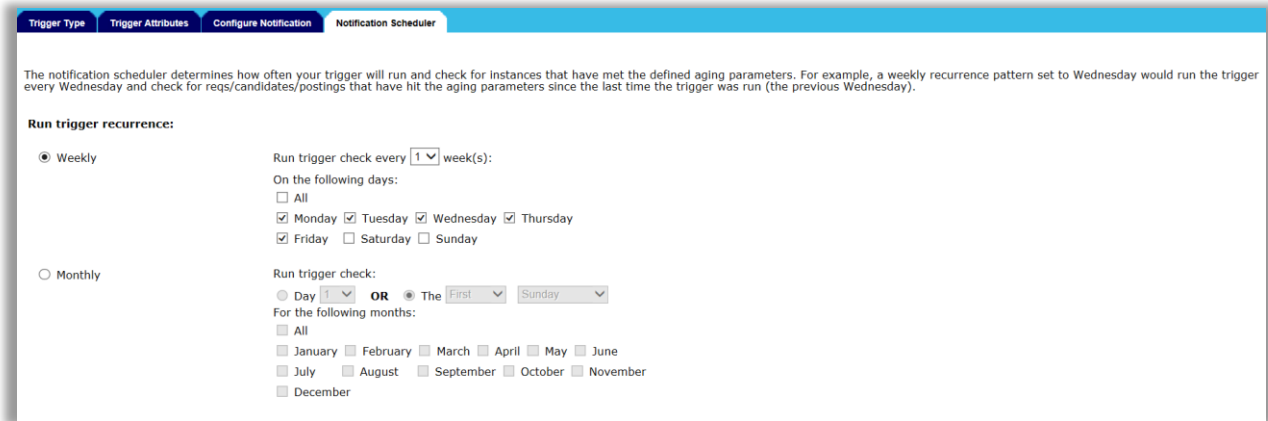
- Checking for specific req form field options to be selected.
- Checking for specific candidate form field options to be selected.
- Populate another candidate form on the candidate’s Talent Record.

AM Trigger: Req Aging

AM Trigger Definition: This notification trigger sent the designated internal user(s) an e-mail message to notify them of requisitions that were over the designated time period(s). The merge fields for this trigger were configured within Automation Manager and appeared in an HTML table below the configured communication template’s message. The trigger could be configured for various aging periods and could be configured for time periods outside the normal requisition age. This trigger ran once daily sending notices at 6:00 AM EST.

AM Trigger Screenshot Example:





Creating a RAM Trigger comparable to this Automation Manager Trigger Type:

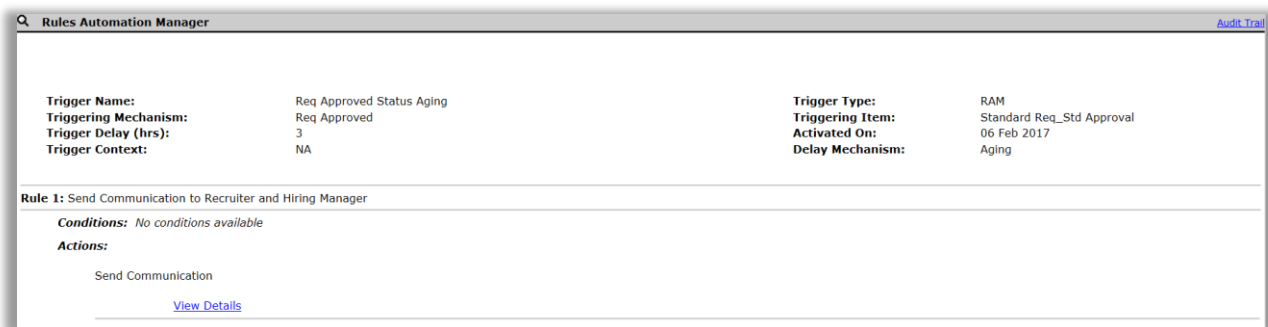
<p>Triggering Mechanism</p>	<p>Req Approved Note: You can only select one req status per trigger, each status desired to be used must be configured in a separate RAM. (Optional Req Statuses to build a trigger off of: Req Approved, Req Cancelled, Req Closed, Req Create, Req Declined, Req Deleted, Req Edit, Req on Hold, Req Open.) Req Pending is not currently available.</p>
<p>Triggering Event</p>	<p>Select the desired req template. Note: You can only select one req template per RAM trigger. For each req template you must configure a separate RAM trigger.</p>
<p>Delay Mechanism</p>	<p>Aging 'Aging' will be used to check for req status aging. If a req status change has occurred & the trigger delay type is 'Aging', RAM will check if the req status is the same after the delay period has expired. If the status is still the same, the trigger is fired & executed. With this new delay mechanism, multiple triggers can be setup using the same trigger event, but different value for 'Trigger delay (hrs)'. Example: Req status change has occurred & the RAM trigger has been configured for Trigger delay type as 'Aging' with trigger delay of 48 hours. In this case, RAM will check after 48 hours if the Req status is still the same, the trigger will be fired & executed.</p>
<p>Trigger Delay (hrs)</p>	<p>Enter the delay timeframe, in hours. Note: Only positive, whole numbers may be used. Currently, RAM does not allow a range of days like Automation Manager did. If you would like to</p>

	set up a 'range' of days, multiple RAM triggers will be required.
Trigger Context	NA
Rule 1	<p><i>This rule will send a notification email to the selected users informing that the Req status has <u>not</u> changed</i></p> <p>Conditions: none</p> <p>Actions:</p> <ul style="list-style-type: none"> - Send Communication - Select the desired recipient(s) of the communication.

RAM Story (Example):

In the RAM example, a communication will be sent out after the req (created with a defined req form) has been in an Approved status for 3 days. After the req has passed through the approval process, and the final approval is completed, the req moves to an Approved status. The RAM trigger waits the allotted 3-day delay. After the 3-day delay, the RAM will check to see if the req is still in an Approved status. If so, the RAM will send a communication to the Recruiter and Hiring Manager listed on the req. This communication will be a reminder for them to log into BrassRing to Open and post their req.

RAM Screenshot (Example):



Additional conditions/actions that can be added to the Rule(s) of your RAM:

- Checking for specific req form field options to be selected.
- Link to Existing Rules
- Check for Req Status
- Populate field Values(Req Subsidiary form)
- Run another instance
- Exit

AM Trigger: Candidate HR Status Aging

AM Trigger Definition: This notification trigger sent the designated internal user(s) an e-mail message to notify them of candidates sitting idle in a starting or intermediate HR status. The merge fields for this trigger were configured within Automation Manager and appeared in an HTML table below the configured e-mail template's message. The trigger was able to be configured for various aging period, applies to candidates in req folders for Open or On Hold requisitions and ran once daily sending notices at 6:00 AM EST.

AM Trigger Screenshot Example:

Trigger Type | **Trigger Attributes** | **Configure Notification** | **Notification Scheduler**

***Select Req Status:** On hold Open

***Select HR Status:** All
 Select HR Status
 Selected (1) | Select >>

***Select Candidate Types:** All
 Select Candidate type
 Selected (0) | Select >>

***Set trigger for Req Templates:** All
 Select templates
 Candidate Tiering Req Form
 Evergreen Req Form
 Standard Req Form (Smart Approval)
 Standard Req Form (Standard Approval)

Trigger Type | **Trigger Attributes** | **Configure Notification** | **Notification Scheduler**

*** Select notification template:**

Language	Template	Preview
<input checked="" type="checkbox"/> *English - United States	[Auto] Candidate in HR Status >X Days	Preview
<input type="checkbox"/> Chinese - China	None	Preview
<input type="checkbox"/> French - France	None	Preview
<input type="checkbox"/> Spanish - Spain	None	Preview
<input type="checkbox"/> Spanish - Spain (Informal)	None	Preview

*** Select merge fields for notification message**
 Up to seven merge fields are allowed. The selected fields will appear in a table at the bottom of the e-mail message for this notification; therefore the merge fields do not need to appear in the body text of the notification template. Selected merge fields should represent required fields.

Available fields:	Selected fields(right)
Add Type Advertising Costs College Department Employee Name External Agency HR Department Recruiter Costs Job Code Division Manager No. of Positions Position Positions Remaining Recruiter Referral Bonus	FirstName LastName Auto req ID Title HR status HR status age

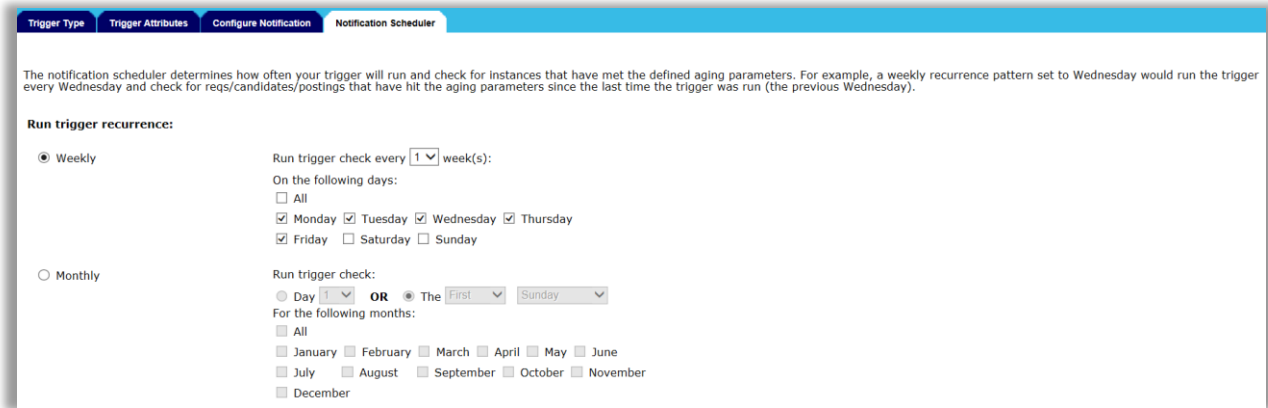
*** Select recipients** Candidate Recruiter Hiring Manager
 Req Team Approvers
 Select system users:
 Selected (0) | Select >>
 Users selected in form fields ?
 Selected (0) | Select >>

*** Select time period:**
 The values selected below will determine the specific aging parameters to trigger a notification to the recipient list.

Equal to | 1 Days + Add value
 AND
 Less than | 1 Days

Selected Values: up to five values allowed

Value	Delete
Greater than or equal to 5 AND less than or equal to 10	Delete



Creating a RAM Trigger comparable to this Automation Manager Trigger Type:

Triggering Mechanism	HR Status
Triggering Event	Select the desired HR Status
Delay Mechanism	<p>Aging</p> <p>'Aging' will be used to check for HR status aging. If an HR status change has occurred & the trigger delay type is 'Aging', RAM will check to see if the HR status is the same after the delay period has expired. If the status is still the same, the trigger is fired & executed. With this new delay mechanism, multiple triggers can be setup using the same trigger event, but a different value for 'Trigger delay (hrs)' is required.</p> <p>Example: HR Status change has occurred & the RAM trigger has been configured with the Trigger delay type 'Aging', with trigger delay of 48 hours. In this case, RAM will check after 48 hours and if the HR status is still the same the trigger will be fired & executed.</p>
Trigger Delay (hrs)	<p>Enter the delay timeframe, in hours.</p> <p>Note: Only positive, whole numbers may be used.</p>
Trigger Context	NA
Rule 1	<p><i>This rule will send a notification email to the selected users informing that the HR status has <u>not</u> changed</i></p> <p>Conditions: None</p> <p>Actions:</p> <p>Send Communication - Select the desired recipient(s) of the communication.</p>

RAM Story (Example):

In the RAM example, a communication will be sent out after the candidate has been in an “Offer Extended” HR status for 3 days. After the candidate is moved to an “Offer Extended” HR status, the RAM trigger waits the allotted 3-day delay. When the 3-day delay has passed, the RAM will check to see if the candidate is still in an Offer Extended status. If so, the RAM will send a communication to the Recruiter and Hiring Manager listed on the req. This communication will be a reminder for them to reach out to the candidate about the pending offer.

RAM Screenshot (Example):

Trigger Name:	HR Status (Offer Extended)	Trigger Type:	RAM
Triggering Mechanism:	HR Status	Triggering Item:	Offer Extended
Trigger Delay (hrs):	72	Activated On:	Not Yet Activated
Trigger Context:	NA	Delay Mechanism:	Aging

Rule 1: Send communication to Req Team

Conditions: No conditions available

Actions:

- Send Communication

[View Details](#)

AM Trigger: Talent Record Viewed – update HR Status

AM Trigger Definition: This automation trigger updates a candidate’s HR Status to a designated start status when the Talent Record is viewed/opened. This trigger runs daily at regular intervals throughout the day, at least once/hour and applies to requisitions are Open or On Hold.

AM Trigger Screenshot Example:

Trigger Type
Trigger Attributes
Trigger Actions

***Select Candidate Types:**

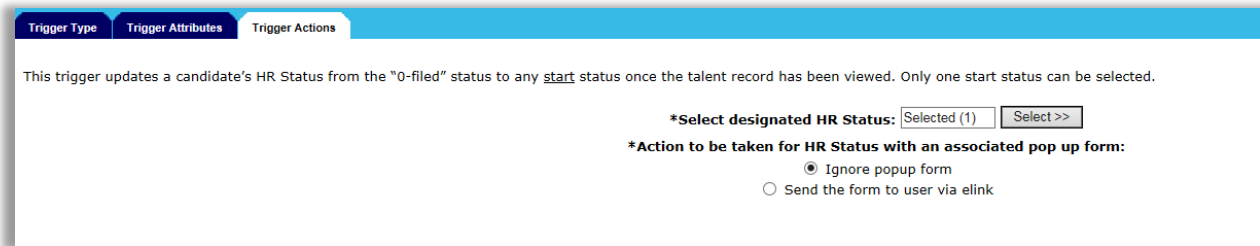
All
 Select Candidate type

Selected (0)
Select >>

***Set trigger for Req Templates:**

All
 Select templates

Candidate Tiering Req Form
 Evergreen Req Form
 Standard Req Form (Smart Approval)
 Standard Req Form (Standard Approval)



Creating a RAM Trigger comparable to this Automation Manager Trigger Type:

Triggering Mechanism	Talent Record Viewed
Triggering Event	Select the desired req template(s)
Delay Mechanism	Delayed Triggering
Trigger Delay (hrs)	Enter the delay timeframe, in hours. Note: Only positive, whole numbers may be used and the minimum delay is 1 hour.
Trigger Context	NA
Rule 1	<p><i>This rule will update the candidate to a designated HR Status.</i></p> <p>Conditions: None</p> <p>Actions:</p> <p>Update HR Status – Update the candidate to a designated HR Status. It is recommended to update the candidate to a Start of Intermediate status.</p> <p>Notes:</p> <p>The Automation Manager trigger only had the capability of updating candidates from 0-filed to a Start status. RAM allows you to update the candidate from Start statuses other than 0-filed.</p> <p>If the client setting “ByPass ClosedLogic when Updating HRStatus in RAM” is enabled, it is strongly recommended to review the workflow and process. This RAM trigger may update candidates to a status that is not desired.</p>

RAM Story (Example):

In the RAM example, the candidate is filed into the req at the start status (defined on the req template level). The Recruiter opens their req folder in BrassRing. (The req was created with a req template selected in the RAM trigger (Triggering Event field)). The Recruiter then clicks on the candidate’s name in BrassRing to open the Talent Record. 1-hour after the Recruiter has opened the Talent Record, the RAM trigger runs and the candidate is updated to a Recruiter Reviewed HR status.

RAM Screenshot (Example):

Trigger Name:	Talent Record Viewed	Trigger Type:	RAM
Triggering Mechanism:	Talent Record Viewed	Triggering Item:	Standard Req_Std Approval
Trigger Delay (hrs):	1	Activated On:	08 May 2017
Trigger Context:	NA	Delay Mechanism:	Delayed Triggering

Rule 1: Update HR Status

Conditions: *No conditions available*

Actions:

Update HR Status

HR Status = (Recruiter Review)

Additional conditions/actions that can be added to the Rule(s) of your RAM:

- Condition to look at only candidates in a specific candidate type.
- Populate field values on a candidate form.

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