­IBM BrassRing on Cloud

**BrassRing Admin Quick Reference Guide**

This Quick Reference Guide is provided without branding and can be edited by your organization as needed.

## Manage Email Templates

1. Select **Menu > Admin > Communications** **> Add communications template.**



1. Insert an email **template** **name** and **body**.
	1. Insert **merge fields** by selecting the **variable group** by using the pull-down menu, selecting the **merge field**, and selecting **Add**.
	2. Insert a **link to a Talent Gateway** by selecting a **Talent Gateway Type**, selecting the **Talent Gateway**, and selecting **Add**.
	3. Insert a **form to complete** or view by selecting a Form and selecting **Add** in the appropriate section.
	4. Insert a **link to a form** to complete or view by selecting a Form and selecting **Add URL** in the appropriate section.
	5. To add **eLinks to the Talent Record**, check Add Talent Record eLinks, and select **the sections** as needed. When sending communication with the [#elink:Talent Record#] token, the template attributes *Send to: Other recipients* is selected by default and the *Send to: Candidates* option is disabled.
	6. Insert a **blurb** by selecting a Blurb and selecting **Add**. Preview the blurb text by selecting **the blurb** and selecting **View text**.
	7. To add **attachments**, select **Choose Files**, select **the files** on your computer, and select **Upload**.
2. Select the **authorized users**, **active status**, and **manual/auto** options.
3. Select **Yes** for **Save Copy of Correspondence**.
4. Select **Save**.

## Manage Document Templates

1. Select **Menu > Admin > Communications > Add document template.**



1. Insert a **template name**.
2. Insert a **pre-configured document name** (optional).
3. Insert the **document content**.
	1. Insert **merge fields** by selecting the **variable group** by using the pull-down menu, selecting the **merge field**, and selecting **Add**.
	2. Select the **paper size**, and **margins**.
	3. Insert a **blurb** by selecting a Blurb and selecting **Add**. Preview the blurb text by selecting **the blurb** and selecting **View text**.
	4. To add **attachments**, select **Choose Files**, select **the files** on your computer, and select **Upload**.
4. Select the **authorized users**, and **active status**.
5. Select **Save**.

## Manage Document Packet Templates

1. Select **Menu > Admin > Communications > Add document packet template.**
2. Insert a **template** **name**.
3. Insert the **instruction text** of the document packet template.
4. Select the **days** **to** **remain** **posted**. The document packet template automatically unposts on the last day.
5. If needed **Upload attachments** from your desktop to be included in the document packet template.



1. Select **Org Groups** authorized to use and administer the Document packet template



1. Select **Yes** to activate the document packet template.
2. Select **Save.**

## Manage Letter Templates

1. Select **Menu > Admin > Communications > Add letter template.**
2. Insert a **letter template name**.
3. Select **List>>** next to Merge Fields.
4. Select the Merge fields to include in the Letter template by selecting **List** and selecting the **Merge fields**.
5. Select the data is **required** or **optional** for merge fields for this letter to be created.
6. Select **Launch MS Word** to open a Word doc. Then click **Preview Merge Format**. A new window opens with merge tokens selected.
7. Create the letter in **MS Word**. Add the merge tokens by copying the characters in the Document Reference column and pasting them into the Word doc.



1. Save the document to your computer.
2. In BrassRing, select **Browse** and upload the Word doc as a letter template
3. Select **Org Groups** authorized to send and the **Users authorized to administer** this letter.
4. Select **Yes** to activate the Letter
5. Select **Yes** or **No** to require Letter creation from within a req folder.
6. Select **Yes** or **No** to determine whether a copy of the correspondence is saved.
7. Select **Save**.

## Administer Codes

1. Select **Menu > Admin > Admin+ > Codes**.
2. Selectthe **administer codes list icon** () for the code to edit.
3. To add a new code, select **+ Add new code**, enter the code information, and select **Save**. Required fields are marked with a red asterisk.
4. To edit information for an existing code, select **the edit pencil icon** () for that code, edit the information and select **Save**.
5. To deactivate a code, select **the code** and select the **Deactivate icon (****)**.

## Administer Lists

1. Select **Menu >Admin >Admin+ > Lists.**
2. Select the **administer this list icon** () for the list to edit.
3. To add a new option, select **+ Add new option**, enter the option code and description, and select **Save.**
4. To edit an option, select **the edit pencil icon** () for that option, edit the information, and select **Save**.
5. To deactivate an option, select **the option** and select the **Deactivate icon (****)**.
6. Select **Export code list to MS Excel** to export the list to Microsoft Excel.

## Stack Duplicate Resumes or CVs

There might be an occasion where duplicate resumes are not automatically stacked by the system duplicate check. BrassRing Administrators can manually stack two duplicate profiles. This process **cannot** be undone.

Stacking a candidate creates a previous version of the resume with all action history. The previous versions can be viewed on the resume tab of the candidate’s talent record.

1. Select **the candidate** with the possible duplicate resume and select **Actions > Stack Duplicate**.
2. The candidate overview appears for the first record. Toggle between the two records by using the links.



1. If you determine that both records belong to the same candidate, decide which record to show as current and which is the duplicate.
2. Select **Keep this candidate** for the record to keep and select **OK**.
3. Selectthe **candidate’s name** to open the Talent Record and select **View Submission History**.
4. The duplicate resume or CV can be viewed by selecting the link in the duplicates section of the submission history.



## Send Mass Email

Sending a Mass email is used to communicate with all active system users. The email is not specific to user types or groups.

1. Select **Menu > Admin > Admin+ > Mass e-mail to users.**
2. Insert a **message subject** and **body.**
3. Select **Send**.

## Audits

**Notes Audit** is used to review public and personal notes (My Notes) that have been added to candidates.

**Attachments Audit**: is used to monitor the attachments that your users have added to BrassRing or your candidates have uploaded on Talent Gateways.

**Login Failure Audit**: is used to identify all failed login attempts to BrassRing by user name. It checks whether the name was valid and provides the date, time, and IP address of the attempt.

1. To run an audit, select **Menu > Admin > Admin +**.
2. Select the **type of audit** to run; **Attachments audit**, **Notes audit**, or **Login failure audit**.
3. Enter **the report parameters** and the **sort options** for the report.
4. Select **Run**.

## Running Standard Reports

Standard reports are categorized into five categories:

* + Billing reconciliation reports
	+ System reports
	+ Hire/Req reports
	+ Dashboard reports
	+ Talent Gateway Reports
1. To run standard reports, select **Menu > Reports > Standard reports.**
2. Select the **run icon** () for the report to be run.
3. The *filter* page opens. Insert any **additional criteria** for the report. Additional criteria can help narrow activities based on a specific date range, specific divisions or locations, or by specific members of the hiring team.
4. Insert the **report criteria** in the *filter* fields.
5. Insert a **report schedule** if needed. The report is emailed to any recipients based on the schedule.
6. Select **an output format**.
7. Select **Generate report now.**
8. Select any **Sorting/Grouping options** to organize the report as needed.

