TalentLink Guide to Rule Engine V20.0

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Document Control

Document Control	Items Updated	Reason for change
V2	• Prerequisites: Point 10 • Process>How it Works: Point 8 and Point 9 (Wait information) and Point 11 new design for access to Edit mode • Selection Process Advanced Rules Templates; Candidate interview section for interviewers added. Feedback URL – custom hyperlink text. • Planned Enhancements section: The names of the communication templates have been updated. • More details in the Interview feedback reminders and Interview reminders template section.	Enhancements introduced with V20.0 release
V3	• Correction in the description Interview feedback reminders and Interview reminders template section. This is highlighted in red text.	Correction

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Contents

Rule Engine – Event based notifications in Selection Process and Job Approval Process

WHAT

Powered by our new Rule Engine, system administrators have the ability to create advanced rules for sending reminders and notifications to ensure your processes stay on time and people complete their required actions.

Advanced rules can be defined for your **Selection Processes** to send:
- User assignment reminders
- Candidate assignment reminders
- Interview reminders
- Reminders for step coordinator, recruiting team members, operational team members
- Notifications for unassigned candidates

Advanced rules can be defined for your **Job Approval Processes** to send:
- Approval reminders to approvers and to other concerned users
- User notifications when job is approved or rejected

To make life easier we have built pre-defined advanced rules templates that you can simply use and configure for each organisation (OBS).

WHY

These features give you confidence that TalentLink uses automation to speed up processes where necessary. For example, with advanced rules in **Selection Process**, you can ensure your candidates are moving through the recruitment process faster for a better candidate experience, user assignment feedback is received in a timely manner, interview attendance rate is increased, increased completion of process steps and you and your team are informed of any delays.
Similarly, with advanced rules in **Job Approval Process**, you can ensure your jobs can be approved faster and you and your team are notified of the outcome.

PREREQUISITES

To get started with creating rule-based notification you will need to create the communication templates and their associated content first.

Define communication templates

1   Navigate to **Communication Templates**

2   In the **Document Type**, you can see 2 new options dedicated to the Selection Process Advanced rules:

   ▪ **Selection process advanced rules templates**– use this option to create communication templates for users

   ▪ **Candidate advanced rules templates**– use this option to create communication templates for candidates
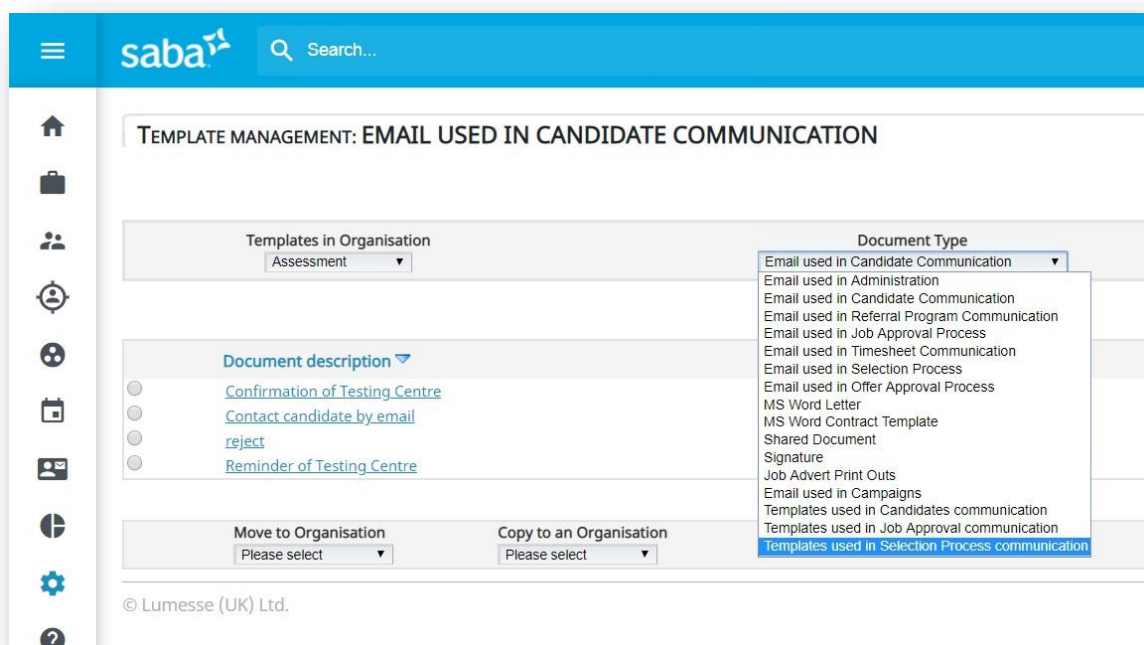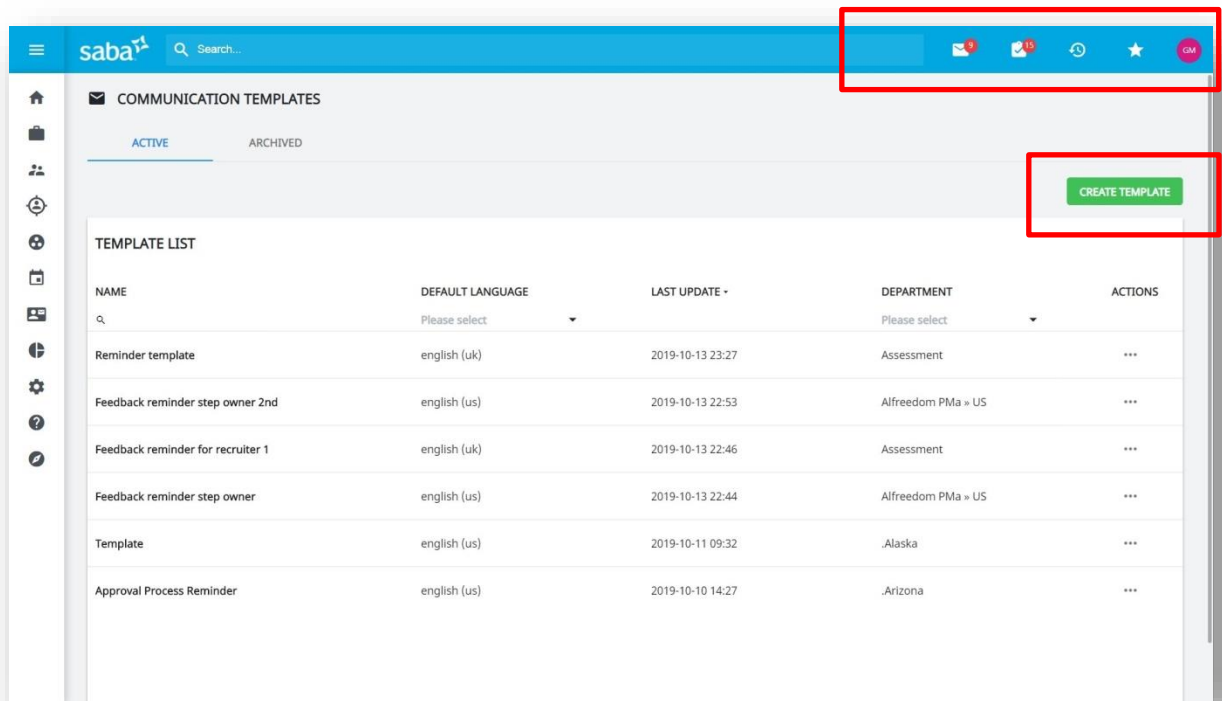

3   In the Document Type, you can see one new option dedicated to the Job Approval Process Advanced rules:

   Job approval advanced rules templates– use this option to create communication templates for users

4   Click on any of these 3 options to access the corresponding list of

communication templates.


5 Click on **CREATE TEMPLATE**

6 Define the **Template Name**, Template **Department** and **Default Language**.

7 Depending on the communication template type, you will be able to define

content in the Default Language of the communication template for each communication channel supported for that template:

- For **Candidate advanced rules templates** you can define content for the **Email** communication channel

- For **Selection process advanced rules templates** you can define content for the **Email** and **Internal Message** communication channels

- For **Job approval advanced rules templates** you can define content for the **Email** and **Internal Message** communication channels

8   Click on the Email icon to define the **Subject** and **Content** for the Email communication channel. Click on the Internal message icon to define the **Subject** and **Content** for the Internal message communication channel.
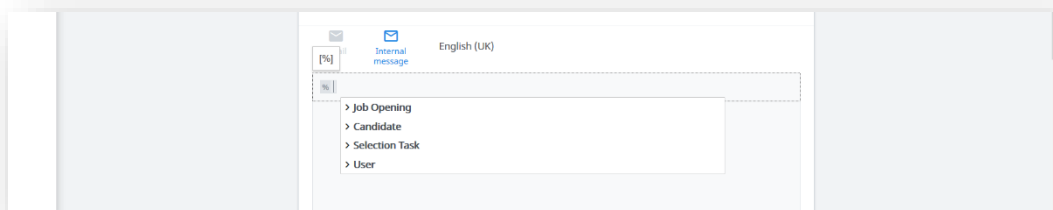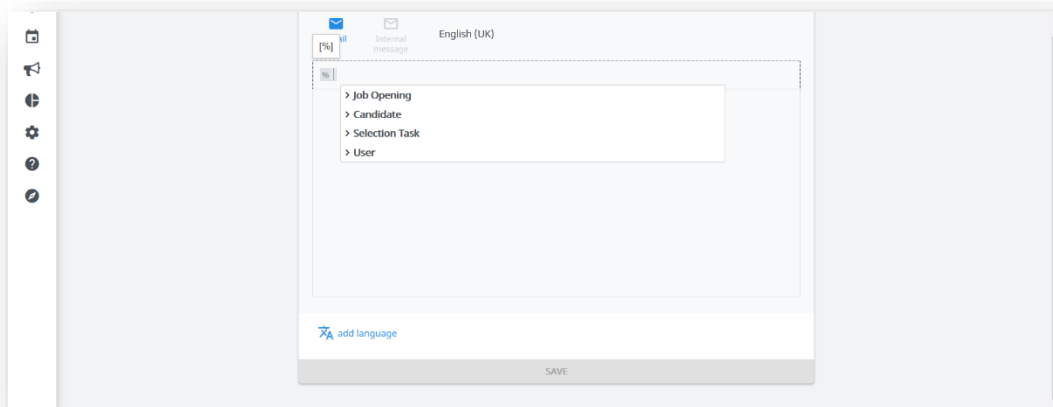

9   You can **add merge fields** to Subject and Content fields. User can click on the "Add merge field" icon or simply type "%" and the system will display the list of merge fields. The merge fields are displayed grouped under headings. Depending on the communication template type, you can use see different groups of merge fields. You can browse, or you can run a keyword search to

find a specific merge field.

10 For Candidate advanced rules templates and **Selection process advanced rules templates**, and only for the Email communication channel, you can add a new type of merge field to the Content fields. From the HTML editor controls, click links icon. Select the type Link type – Feedback report, define the custom hyperlink text and click Ok. A dedicated merge field is inserted in the Content field. **Note: When the email is sent to the candidates or users, the custom hyperlink text will be displayed to them and the link will open the**

feedback report form that was initially assigned to them to complete.
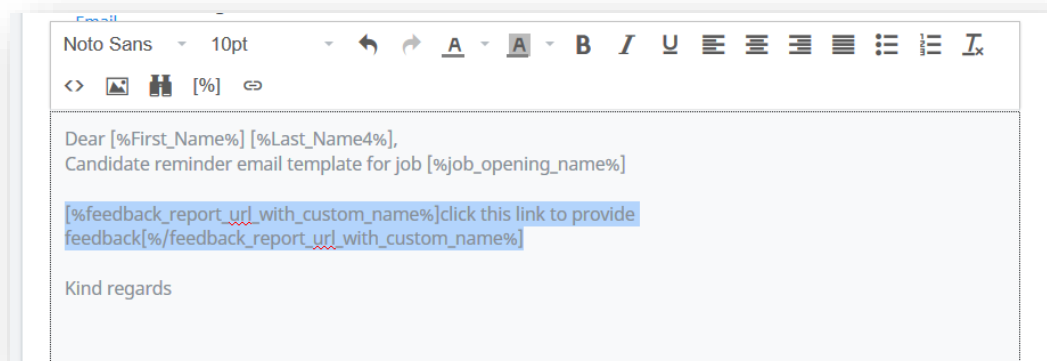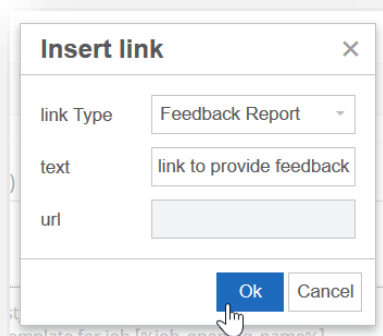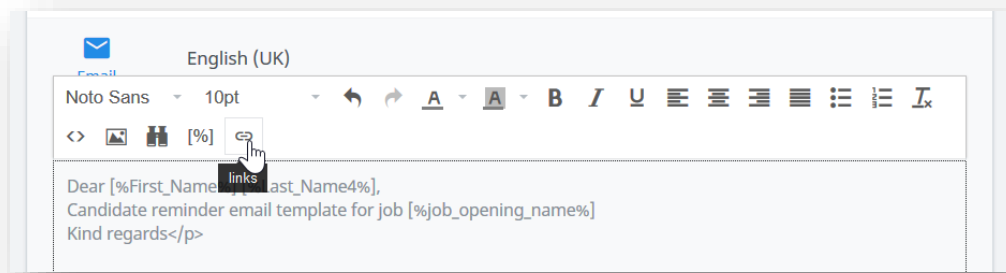
11 Click on **add language** to define different content per language. Considering the user/candidate preferred communication language, if the communication template has content defined in their language, they will receive this content, otherwise they will receive the content defined for the default template language.
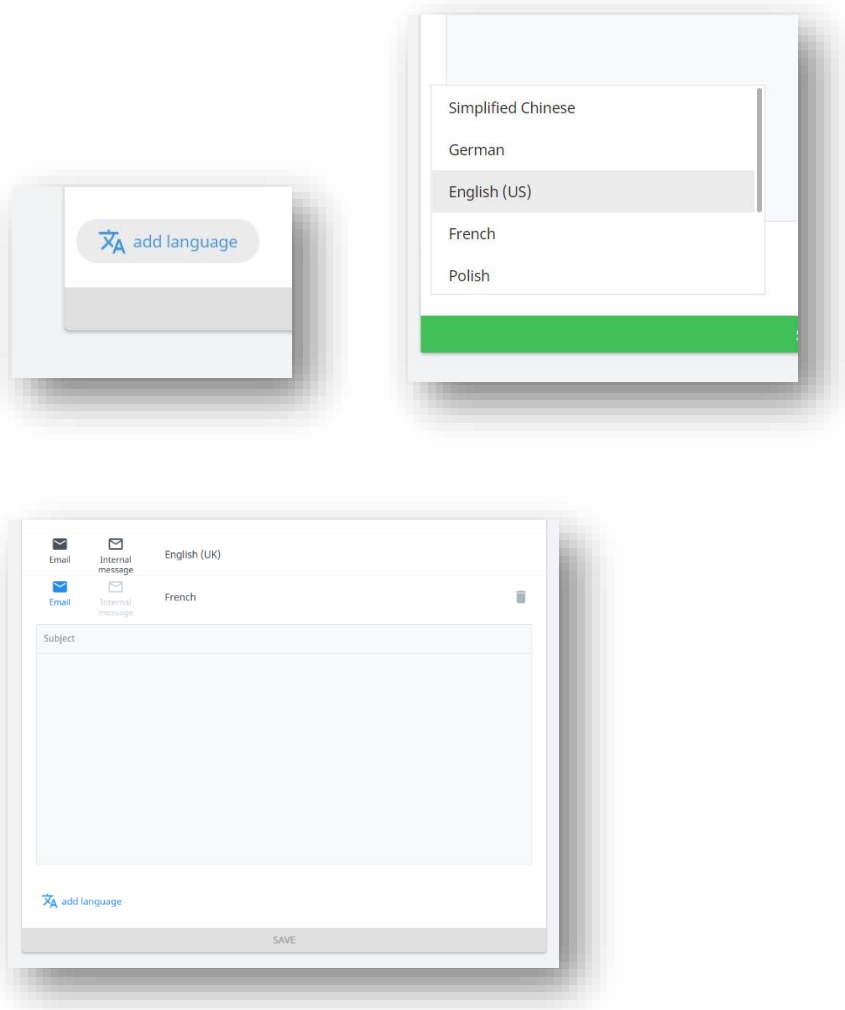
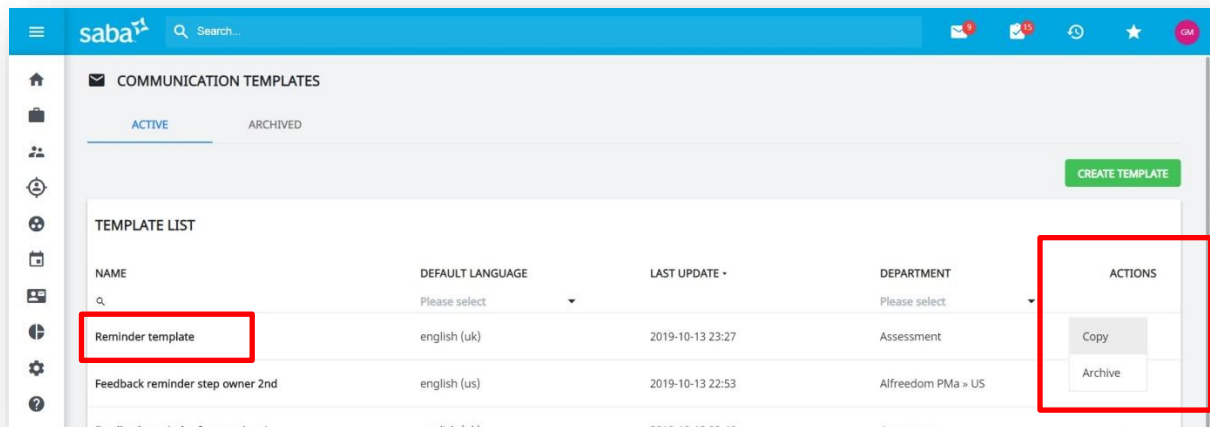**12** When done, click on the **SAVE**.

13 The new template appears in the list of templates.

14 You can click on the template name to **edit** it.

**15** In the templates list, for each template you have an action menu with options to

Archive the template and to **Copy** the template.
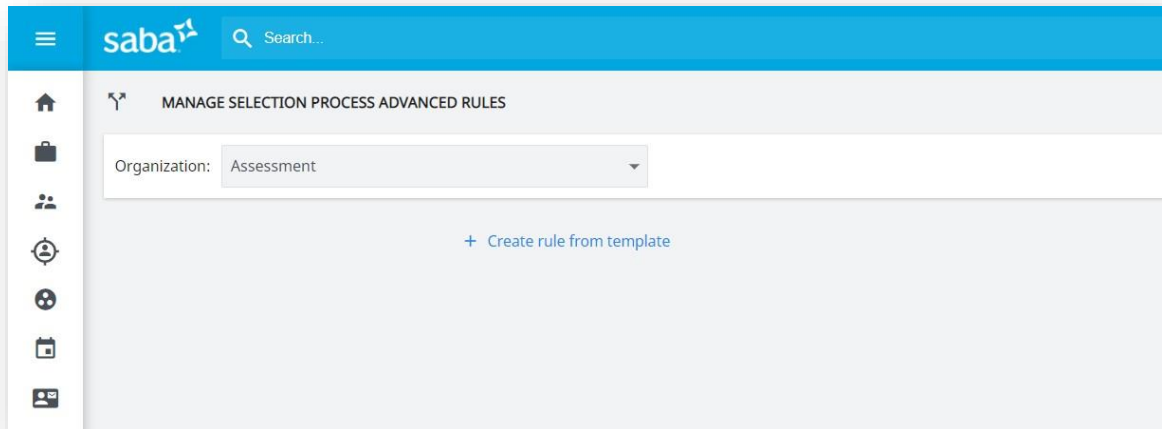

HOW IT WORKS

Manage advanced rules for Selection Process per Organisation

1 Navigate to **System Administration** and select an **Organisation**

2 Then click on **Process Management**

3 In the **Selection Process** area, there is a new link **Manage Advanced Rules**
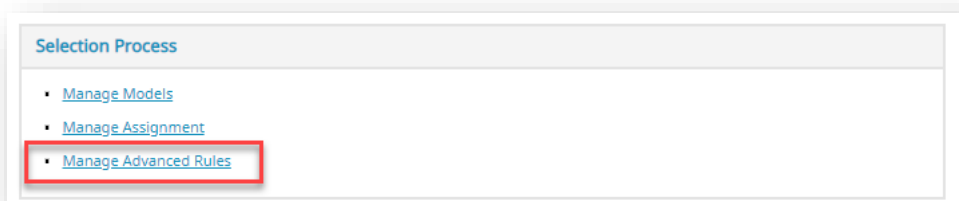
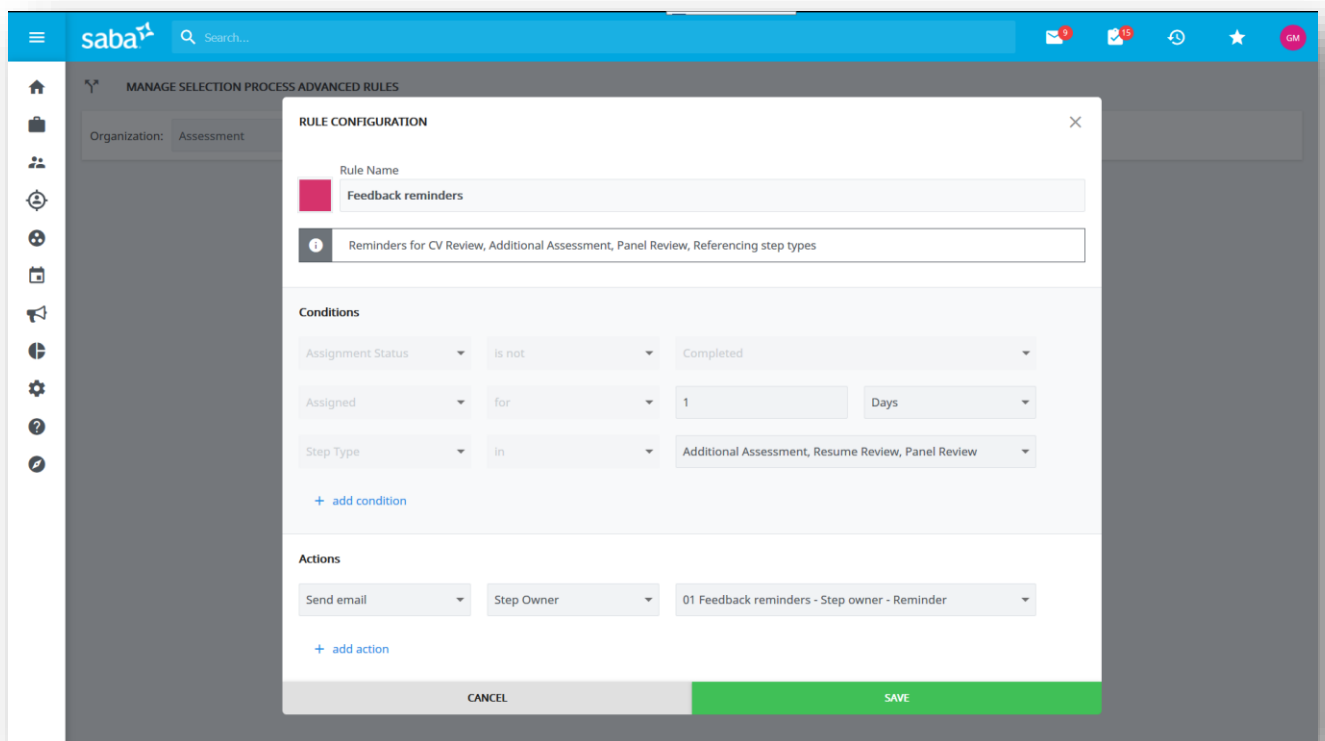**4** Click this link to access new page **MANAGE SELECTION PROCESS ADVANCED**

RULES

5   In case you choose the wrong Organisation, you can use to the Organisation filter to correct yourself

6   Click on **Create rule from template** and choose one of the pre-defined rule templates (see below chapter with details for each selection process rule template) – on hover over, you can see the rule description to help you choose

the one you need.
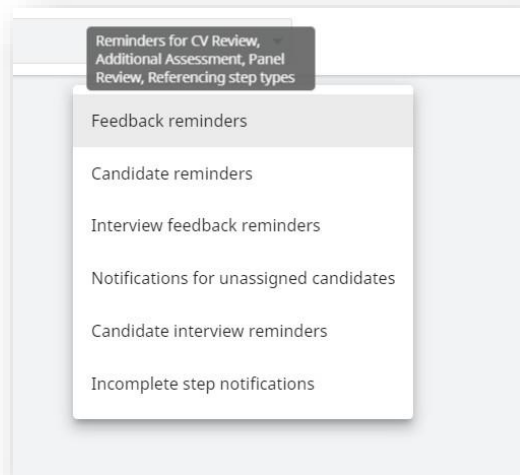
7 The rule creation form is displayed, the **rule colour** and **rule name** are pre-filled from the rule template and you can change them. The **rule description** is visible to provide details even after you've personalised the rule name.

Best practice tip: The colours are designed to group your rules for easy

identification.

8 In the **Conditions section**, the conditions are pre-set based on the template you've selected but you can configure them.

- **Step Type**: All Selection Process Advanced rules except "Notifications for unassigned candidates" contain the **Step Type** condition. When you create a rule and you select one or more step types, all steps from all selection processes from the Organisation that have one of the selected step types will inherit this rule. AdHoc added steps that have one of the selected step types will inherit this rule as well.

- **Step Name**: All Selection Process Advanced rules except "Notifications for unassigned candidates" contain also the **Step Name** condition. You will be able to see step names that are available in the last version of the active selection processes (not disabled). Next to the step name, you can see the Selection Process name and version. When you create a rule and you select one or more steps, only the selected steps will inherit this rule. When you create a rule and you select to exclude one or more steps, all steps from all selection processes from the Organisation that have one of the selected step types AND that are not in the excluded step list will inherit this rule. AdHoc added steps cannot be selected here.

- **Time based conditions** can be configured, you can enter time units and choose the time period from the following list: hours, days, weeks, weekdays (Mon-Fri).

Best practice tip: You can keep your Selection Process Advanced rules simple by only defining Step Type condition, and do not define any **Step Name** condition.

9 In the **Action sections** you can define the actions you want to be performed when the conditions are met. Up to 10 actions can be defined. The following action types are available:

- **Send an Email**: for this action you need to configure the communication template that will be used for sending the email and who are the recipients. The **Email** content configured in the communication template will be sent. Depending on the rule template used (and sometimes on the selected step

type), one or more recipients can be chosen from:

- Step Owner (user in charge of completing the step, and depending on the step, this is known as Assignee, Step Owner, Lead Interviewer, Panel Lead)

- Panelist (every panelist will receive a separate email)

- Referee (every referee will receive a separate email)

- Interviewer (every interviewer will receive a separate email)

- Candidate

- Step Coordinator

- Recruiting team members

- Operational Team members

ⓘ By default, the emails will be sent from standard TalentLink domain ('company_name.recruitmail.com' or 'company_name.sandbox.recruitmail.com' in the case of sandbox slices). If you want to send emails from TalentLink using your own domain (by using Simple Email Service - provided by Amazon), please initiate the custom mail domain configuration & verification procedure by sending to Account Management or via Customer Portal (as a work request) the list of domains which can be used by TalentLink email services

- **Send Internal message**: for this action you need to configure the communication template that will be used for sending the internal message and who are the recipients. The **Internal message** content configured in the communication template will be sent. Depending on the rule template used (and sometimes on the selected step type), one or more recipients can be chosen from the above list except for Candidate.

ⓘ The reminders and notifications will be received in Messages area in Top bar panel.

- **Wait**: for this action you need to configure the period of time the system will need to wait before executing the next action(s). You can enter time units and choose the time period from the following list: hours, days, weeks, weekdays (Mon-Fri).
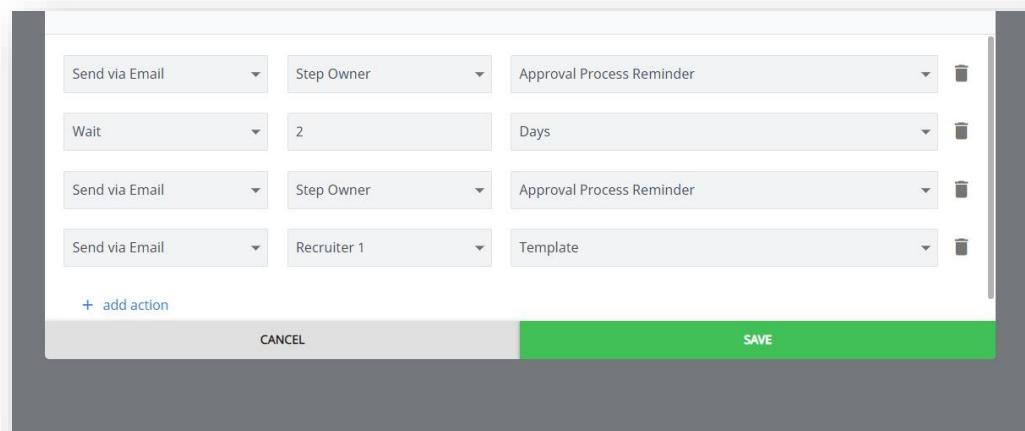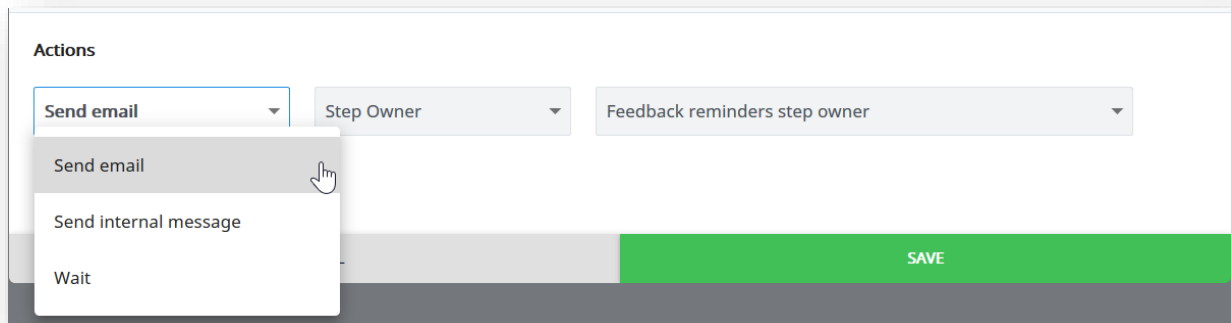
Best practice tip: You can setup several series of reminders and notifications using **Wait** action. Example:

- Setup rule to send the first reminder 7 days after a selection step is started to the responsible user

- Then setup a Wait action with 2 weekdays (Mon-Fri) delay

- Then send a second reminder to the responsible user and also to the Recruiter 1 of the job

- Then setup a Wait action with a 2 days delay

- Then send a 3rd reminder to the responsible user and also to the whole the recruiting team of the job

10 When done, click **SAVE** button to add the rule. The latest rule will be added on

the top. The rule is added disabled.
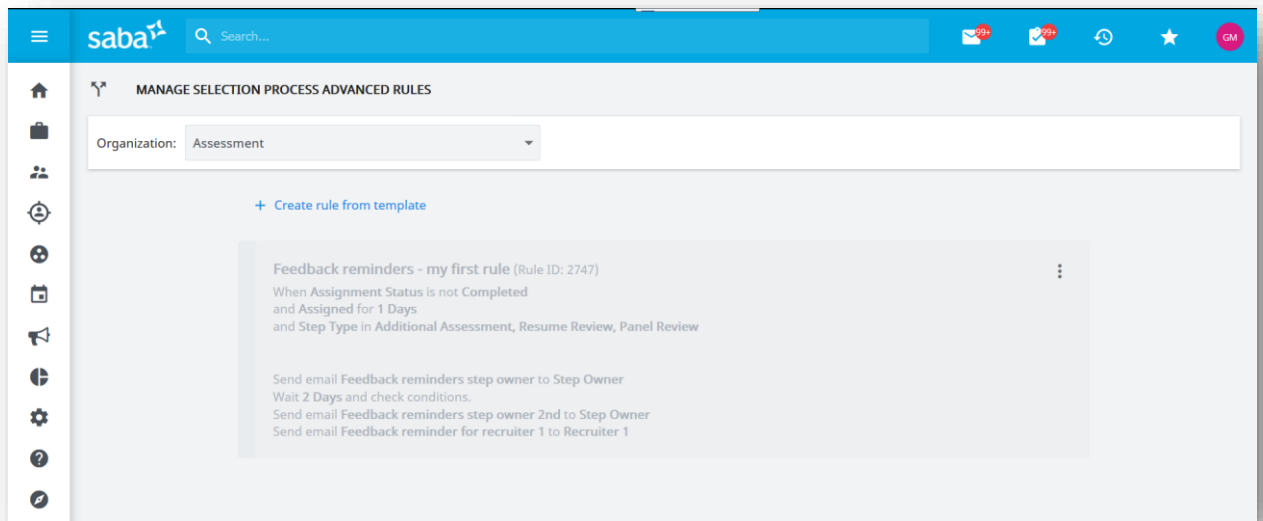
11 The rule card has an action menu with options to **Enable this rule**, **Edit** rule and **Delete** rule.

12 In case you want to **edit the rule**, click on the rule card or on the **Edit** action from the action menu.

13 The rule form opens, and you can edit it, click **SAVE** when done

14 Once you are ready with the rule, click on **Enable this rule**.

15 When a rule is enabled, only the newly started selection steps will consider this rule. The date when rule was enabled is displayed in the rule card.

ⓘ   When a notification is sent by the system, a log entry is added in the Candidate history.

ⓘ   When you disable a rule, the selection processes stop using this rule. When you enable the rule again, only the newly started selection steps will consider this rule.
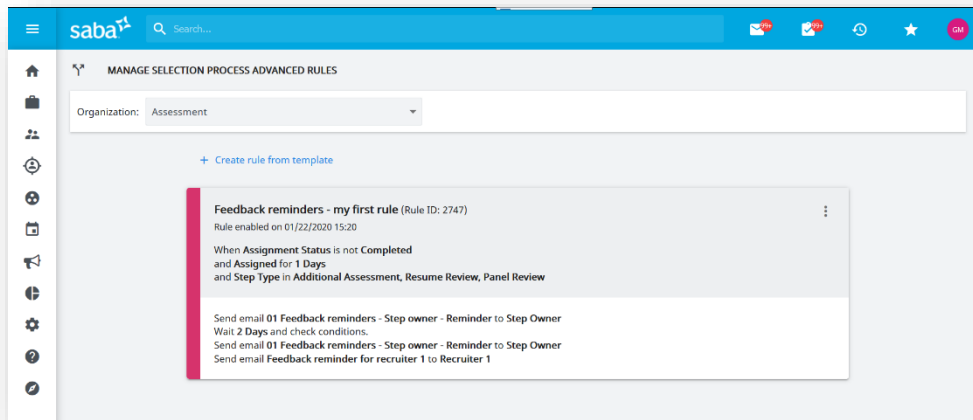

ⓘ If you want to edit the rule, you need to disable it first.

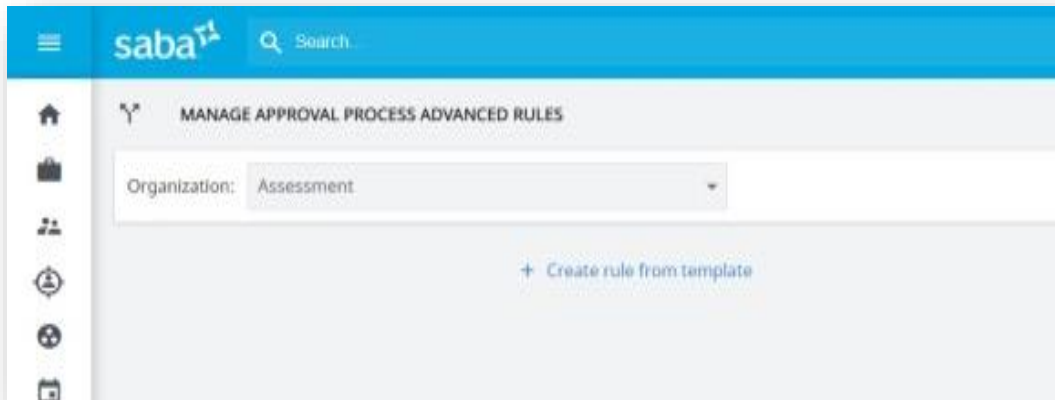**Manage advanced rules for Job Approval Process per Organisation**

In the same way as you manage advanced rules for Selection Process, you can manage advanced rules for Job Approval Process.

1   Navigate to **System Administration** and select an **Organisation**

2   Then click on **Process Management**

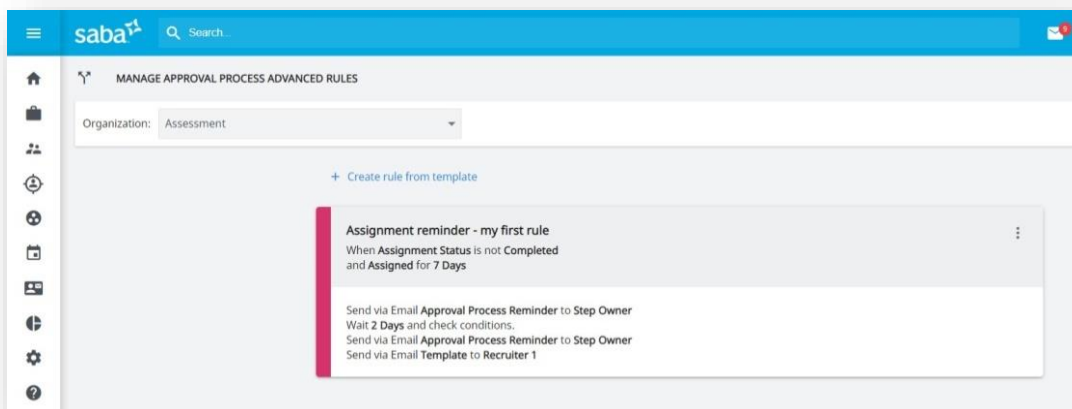3   In the **Job Approval Process** area, there is a new link **Manage Advanced Rules**
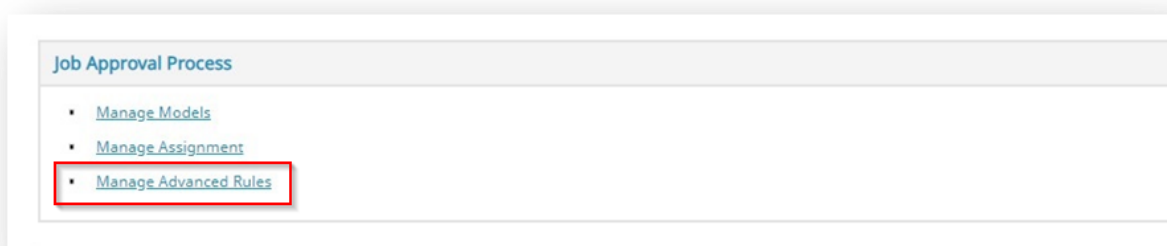
4   Click this link to access new page **MANAGE JOB APPROVAL PROCESS**

ADVANCED RULES

Then follow the same steps as for Selection Process Advanced rules (see below chapter with details for each job approval process rule template).

ⓘ   When a notification is sent by the system, a log entry is added in the job approval history.

Selection Process Advanced Rules templates

Colour	Rule name	Rule description	When to use it
■	**Feedback reminders**	Reminders for CV Review, Additional Assessment, Panel Review, Referencing	You can setup this advanced rule when you want to remind the assigned users to provide their feedback (Step Owner, Panellist, Referee) and at the same time keeping informed the Recruiting Team /

		step types	Operational Team about the delayed feedback.
	Interview feedback reminders	Reminders for Interview and Session step types	You can setup this advanced rule when you want to remind the assigned users to provider their feedback (Step Owner, Interviewer) and at the same time keeping informed the Recruiting Team / Operational Team about the delayed feedback. The time delays are based on the interview end date and not from the assignment date as for the other rules. **Note: For interview steps, we are supporting this type of rule for interviews created with Interview Scheduling tool (including Smart calendar).** **However, interviews created with Interview Scheduler (interview slots defined per job) is not yet supported**.
	Candidate reminders	Reminders for Additional Information from Candidates and External System step types	You can setup this advanced rule when you want to remind the candidate to provider their feedback and at the same time keeping informed the Recruiting Team / Operational Team about the delayed feedback.
	Interview reminders	Reminders for candidates and interviewers before the interview and session	You can setup this advanced rule when you want to remind the candidate and interviewers the interview date & time to increase interview attendance rate. The time delays are based on the interview start date and not from the assignment date as for the other rules. You can decide to send reminders depending on the interview status (Confirmed, Invited, Pending).

			Note: For interview steps, we are supporting this type of rule for interviews created with Interview Scheduling tool (including Smart calendar). **However, interviews created with Interview Scheduler (interview slots defined per job) is not yet supported.**
🟩	**Notifications for unassigned candidates**	Notifications about candidates who have no step assigned	You can setup this advanced rule when you want to inform the Recruiting Team / Operational Team very quickly when last step of the candidate is completed, and he/she is unassigned.
🟧	**Incomplete step notifications**	Notifications when step is not completed	You can setup this advanced rule when you want to inform the Step coordinator / Recruiting Team / Operational Team about the step delays separately from the reminders you send to the users assigned to perform the step.

Best practice tip for Feedback reminders and Interview feedback reminders: In the communication template you prepare for assigned users reminders you can add:

- **Feedback Report URL [%feedback_report_url%]** merge field and **Feedback Report URL with custom hyperlink text [%feedback_report_url_with_custom_name%]** merge field to quickly provide the link to the assigned user to complete his assignment. When the link is clicked, if your company is using Candidate Review Tool, the user will automatically access the Candidate Review Tool where he can find all the information to perform his assignment. If your company is not using the Candidate Review tool, the user will automatically access the feedback report form that was assigned to him to complete.

- **Selection task assignment date [%selection_task_assignment_date%]** merge field to remind assigned user when he received the assignment.

Best practice tip for Candidate reminders: In the communication template you prepare for

the candidate reminders, you can add

- **Feedback Report URL [%feedback_report_url%]** merge field and **Feedback Report URL with custom hyperlink text [%feedback_report_url_with_custom_name%]** to quickly provide the link to the candidate to complete his assignment. When the link is clicked, the candidate will automatically access the feedback report form that was assigned to him to complete.

- **Selection task assignment date [%selection_task_assignment_date%]** merge field to remind candidate when he received the assignment.

Job Approval Process Advanced Rules templates

Colour	Rule name	Rule description	When to use it
■	**Assignment reminder**	Reminders for approvers	You can setup this advanced rule when you want to remind the assigned approvers to provider their approval and at the same time keeping informed the Recruiting Team / Operational Team about the delayed approval.
■	**Approval notification**	Notifications when job is approved	You can setup this advanced rule when you want to inform the Recruiting Team / Operational Team very quickly when job is approved.
■	**Coordinators notifications**	Notifications when step is not completed	You can setup this advanced rule when you want to inform the Recruiting Team / Operational Team about the approval step delays separately from the reminders you send to the approvers.
■	**Approval rejected notification**	Notifications when job approval is rejected	You can setup this advanced rule when you want to inform the Recruiting Team / Operational Team very quickly when job

			is rejected.

Best practice tip for Assignment reminders: In the communication template you prepare for assigned approvers reminders, you can add:

- **Job Approval URL [%job_approval_url%]** merge field to quickly provide the link to the assigned approver to complete his assignment.

- **Approval step assignment date [%approval_step_assignment_date%]** merge field to remind the assigned approver when he received the assignment.

Planned enhancements

- Ability to define the sender in the communication templates

This functionality will be available on your sandbox account with TalentLink Release 20.0. The feature will then be activated on the live account with TalentLink Release 20.1.

Ability to define the sender in the communication templates

HOW IT WORKS

1. There is a new option available when creating or editing a communication template **Send as**. By default, the value for this field is **System sender**.

2. If you want to define the sender, select **Custom sender**.

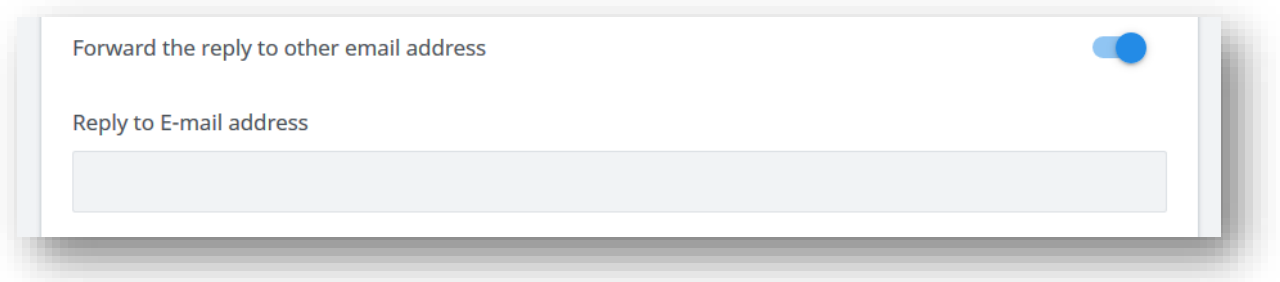3. For the sender email address, type first the user name. If you already have defined verified custom domains in TalentLink, they will appear in the list and you can select

one of them. If no verified custom domains are defined, we will provide a default one which is a sub-domain specific to your slice. If you want to add your custom verified domain(s), please contact Support team.

4. You can also provide a **Display Name** for the sender.

5. If you want to have the replies forwarded to an email address, switch on **Forward the reply to other email address**. Fill in the email address (username@domain).

6. When the communication template is saved, all emails that are sent using this communication template will have be sent using the configured sender information.