

Advanced Rules Management

Overview

Powered by the TalentLink Rule Engine, we now 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

Advanced rules can be defined for your Job Posting Processes to send:

- Notification of a job going live or closing on myjobscotland

Advanced rules can be defined for your Offer/Hiring Processes to send:

- Offer approval reminders and confirmation of approval notifications
- Offer acceptance reminders for candidates
- Offer decision notifications (acceptance/decline)
- New hire notifications

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

Benefits

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.

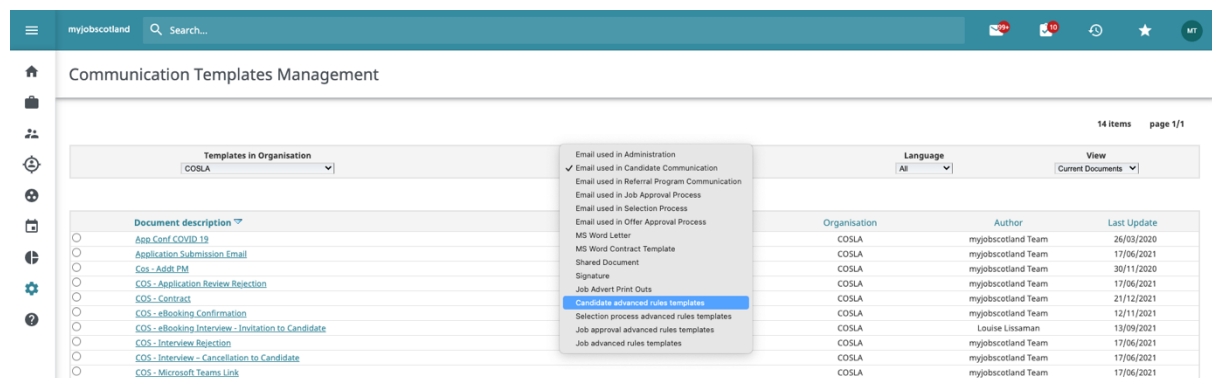
Similarly, with advanced rules in Job Approval Process, you can ensure your jobs can be approved faster and you and your team are notified of the outcome. Jobs notifications allow automation of notifications to recruitment panels when a job becomes live or closes on myjobscotland, replacing manual processes which may currently be followed.

Prerequisites

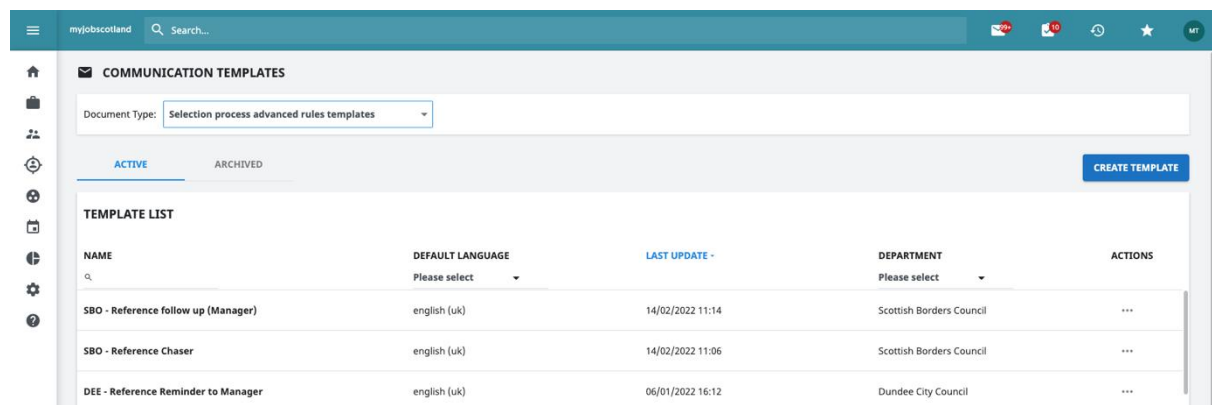
The myjobscotland team will build the rule for you but to get started with creating rule-based notification you will need to create the communication templates and their associated content first.

Define communication templates

1. Navigate to Communication Templates
2. In the Document Type, you can see 4 new options dedicated to the Selection Process Advanced rules:
 - **Selection process advanced rules templates** – Use this option to create communication templates for users i.e. recruiting manager/referee reminders linked to the selection process steps.
 - **Candidate advanced rules templates** – Use this option to create communication templates for candidates.
 - **Job Approval advanced Rules Templates** – Use this option to create communication for users relating to the job approval process
 - **Job advanced Rule Templates** – Use this option to create communications for users pertaining to the job creation or posting



3. Click any of these options to access the corresponding list of communication templates.



4. To create a new template for your Organisations click **CREATE TEMPLATE**.

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COMMUNICATION TEMPLATE (SELECTION PROCESS ADVANCED RULES TEMPLATES)

Template Name required
 mjs - Reference Reminder Example

Department required
 COSLA

Default Language required
 English (UK)

Description
 This template will be send after 5, 10 and 15 days to chase an incomplete reference request

Priority Normal Sensitivity Normal

Send as required
 System sender

Email Internal message English (UK)

[+add language](#)

CANCEL SAVE

5. Define the **Template Name**, **Template Department** and **Default Language**.
6. Depending on the communication template type, you will be able to define content of the communication template for each communication channel supported for that template:
 - a. For Candidate advanced rules templates, you can define content for the Email communication channel.
 - b. For Selection process advanced rules templates, you can define content for the Email and Internal Message communication channels.
 - c. For Job approval advanced rules templates, you can define content for the Email and Internal Message communication channels.
7. Add a **Description** as a reminder of the purpose of the communication.
8. Assign a **Priority** and **Sensitivity**.
9. In the **Send as** field, you can keep the default as System sender.
10. Click the Email icon to define the Subject and Content for the Email communication channel. Click the Internal message icon to define the Subject and Content for the Internal message communication channel.

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[add language](#)

CANCEL SAVE

11. 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.

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Description
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Priority Normal Sensitivity Normal

Send as required
System sender

Email Internal message English (UK)

[%]

Content

- > Application
- > Candidate
- > Job Content
- > Selection Process
- > Interview participant
- > User Data
- > Lead Interviewer
- > Service Team Member

12. For **Selection Process** advanced rules (with corresponding templates in Document Type>**Candidate Advanced Rules** and **Selection Process advanced rules** templates) users can add **merge fields** that will resolve with answers to questions from **Forms & Questionnaires**.

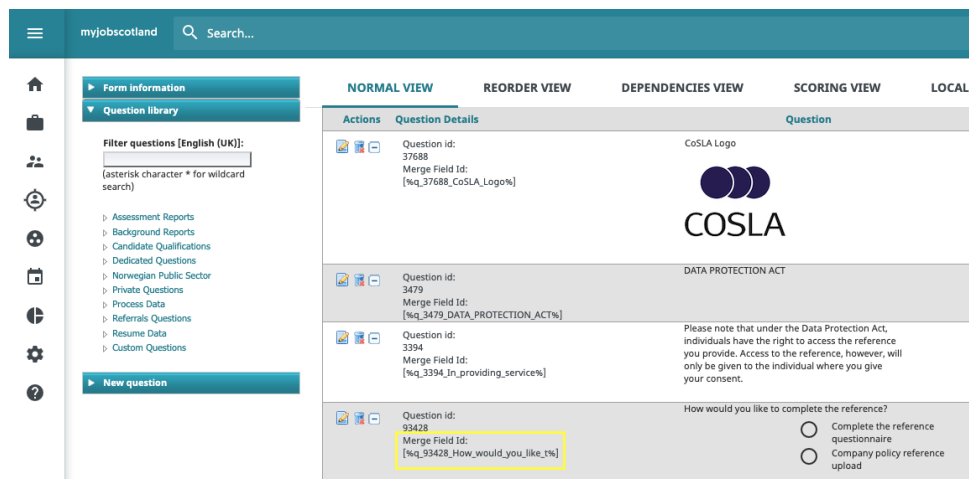
How it works:

Question-based merge fields

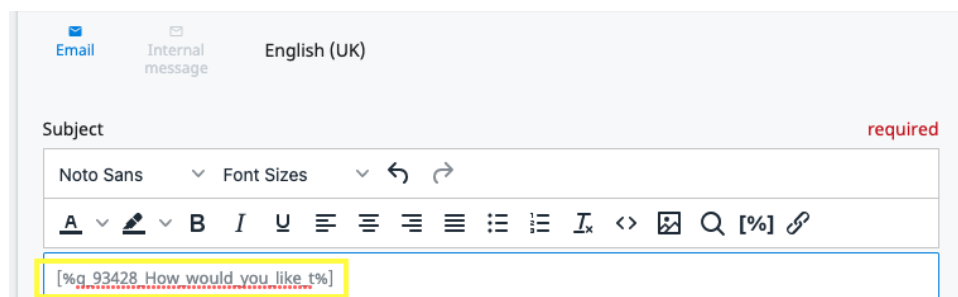
- First you will need to identify the merge field, therefore navigate to "Forms & Questionnaires" and pick the form from which the values should be use in the communication template (Candidate advanced rules templates and Selection process advanced rules templates).
- Beside each question in any TalentLink online form there is an "+" icon to view the merge field code for that question: Clicking the "+" icon expands to reveal the question merge field information:

The screenshot shows the TalentLink interface for managing forms and questionnaires. The top navigation bar includes the 'myjobscotland' logo and a search bar. The left sidebar contains a home icon, a briefcase icon, a user icon, a question icon, a gear icon, and a question mark icon. The main content area is divided into two sections: 'Form information' and 'Question library'. The 'Question library' section has a filter for 'English (UK)' and a list of question categories: Assessment Reports, Background Reports, Candidate Qualifications, Dedicated Questions, Norwegian Public Sector, Private Questions, Process Data, Referrals Questions, Resume Data, and Custom Questions. The 'Question' section is currently selected, showing a list of questions. The first question is 'CoSLA Logo'. The second question is 'DATA PROTECTION ACT'. The third question is 'Please note that under the Data Protection Act, individuals have the right to access the reference you provide. Access to the reference, however, will only be given to the individual where you give your consent.' The fourth question is 'How would you like to complete the reference?'. This question has two radio button options: 'Complete the reference questionnaire' and 'Company policy reference upload'. The '+' icon next to this question is highlighted with a yellow box, indicating that clicking it will reveal the merge field information for this question.

For example, for the question "How would you like to complete the reference" in the example, the merge field identifier will be [%q_93428_How_would_you_like_t%].

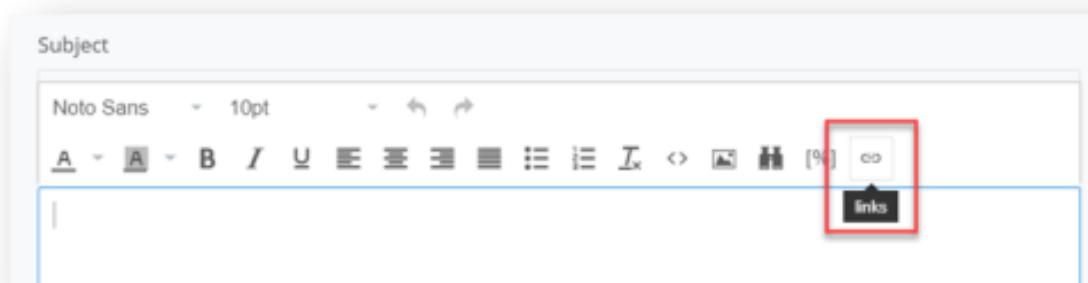


- c. Copy the merge field identifier, then paste it to a new or existing communication template (**Candidate advanced rules templates** and **Selection process advanced rules templates**)



When a Selection Process Advanced Rule is using a communication template with question merge field, when the system sends the reminders and notifications for this rule, the question merge field will be replaced with the most recent answer to this question.

13. For **Candidate advanced rules templates** and **Selection process advanced rules templates**, and only for the Email communication channel, you can add a merge field related to system links to the Content fields. From the HTML editor controls, click the links icon.



Select the type of **Link type** you wish to use; Standard, Feedback Report, Accept Interview/Decline Interview, Questionnaire.

ADD LINK ✕

Link type required

Standard ▼

- Standard
- Feedback Report
- Accept Interview
- Decline Interview

CANCEL ADD

Define the custom hyperlink text and click **ADD**. A dedicated merge field is inserted in the Content field.

ADD LINK ✕

Link type required

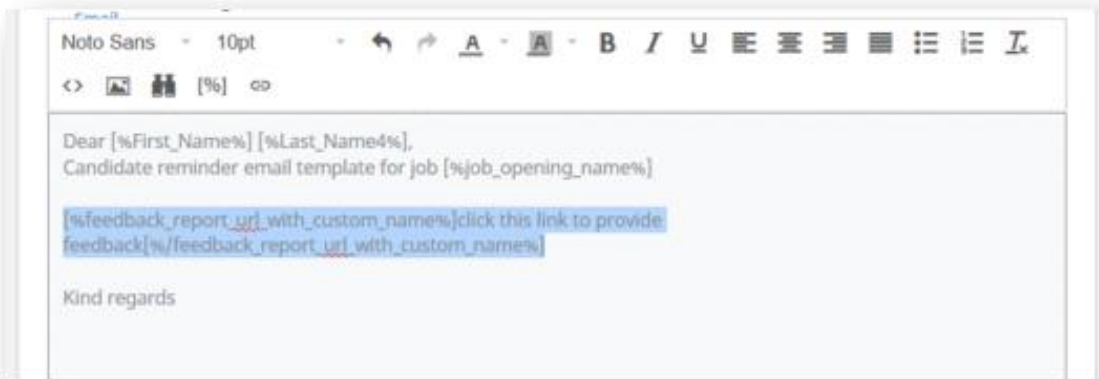
Feedback Report ▼

Display text

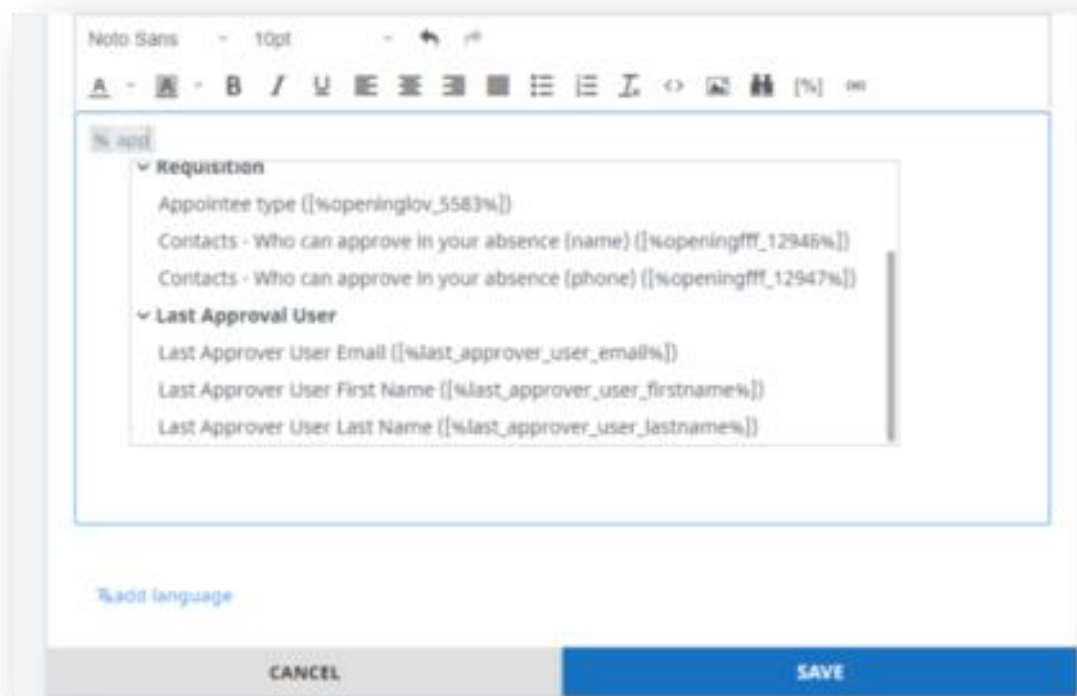
link to provide feedback

CANCEL ADD

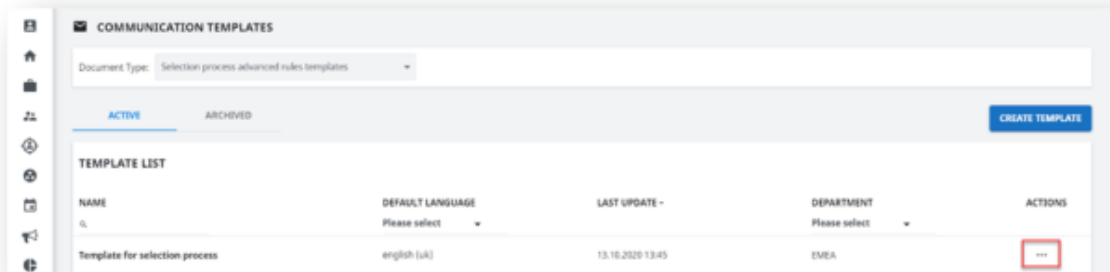
Note: In the case of Feedback Report when the email is sent to the candidates or users, the custom hyperlink text will be displayed to them and the link will open the feedback report form that was initially assigned to them to complete.



14. **For Job Approval templates** a merge field called Last Approver User is available. These merge fields allow the details of the last approver who performed an action to be applied in the template. They include: Last Approver User Email, Last Approver User First Name and Last Approver User Last Name.
- When a job is rejected then those merge fields will be replaced with first name, last name and email address of the person that rejected the job.
 - When a job is approved than those merge fields will be replaced with first name, last name and email address of the last person that approved the job.



17. When finished, click **SAVE**.
18. The new template appears in the list of templates.
19. You can click the template name to edit it.
20. In the templates list, for each template you have an action menu with options to **Archive** the template and to **Copy** the template.



Once your templates have been built contact myjobssupport@cosla.gov.uk to create the rule, specifying the frequency required;

e.g. If the reference is not completed after 5 days send template “provide template name” to the referee

Wait a further 5 days and send template “provide template name” to the referee

Wait a further 3 days and send template “provide template name” to the Hiring Manager 1