

Rules Automation Manager Triggers

WB > Tools > Automation Manager > Admin

There are several triggers that can be set up for assessments through Rules Automation Manager (RAM). Automation Manager can no longer be used to create assessment triggers.

- Invite candidate to take assessment when they reach a designated HR status
- Send candidate an assessment reminder email if they have not completed ALL assessment within a specified amount of time.
- Automatically update a candidate’s HR status if they have not completed all assessments within a specified amount of time.
- Update HR status based on assessment result
- Update HR status based on batch assessment results
- Copy existing, valid, assessment results into requisitions

Send Assessment Invitation

The below RAM trigger is an example of a simple trigger that sends an invitation to take an assessment to the candidate when they hit a designated HR Status. Additional conditions can be added to limit the candidate pool that is invited to take the assessment. This method is typically used when assessments are not initiated at the time of job submission, but rather later on in the recruitment process.

Trigger Name:	HR Status (Initiate Assessment)	Trigger Type:	RAM
Triggering Mechanism:	HR Status	Triggering Item:	Initiate Assessment
Trigger Delay (hrs):	0	Activated On:	Not Yet Activated
Trigger Context:	NA	Delay Mechanism:	Delayed Processing

Rule 1: Send Assessment Invite

Conditions: No conditions available

Actions:

- Send Communication

[View Details](#)

The following tokens can be added to communication templates depending on what URL you would like to include in the email.

The screenshot displays the 'MESSAGE BODY' configuration window. On the left, there is a rich text editor with a 'Source' view showing the following tokens: `#{RequisitionCus.AssessmentBatch1#}`, `#{RequisitionCus.AssessmentBatch2#}`, `#{RequisitionCus.AssessmentBatch3#}`, `#{RequisitionCus.AssessmentBatch4#}`, `#{RequisitionCus.AssessmentBatch5#}`, `#{RequisitionCus.AssessmentBatch6#}`, and `#{RequisitionCus.AttachAssessments#}`. On the right, the 'Merge fields' panel is open, showing a list of fields: 'Req custom fields', 'AssessmentBatch1', 'AssessmentBatch2', 'AssessmentBatch3', 'AssessmentBatch4', 'AssessmentBatch5', and 'AssessmentBatch6'. Below this list are options to 'Add', 'Add numeric field with formatting', 'Add date field with formatting', and 'Add additional user information'. At the bottom, there is a section for 'Link to job(s) on Gateway' with a 'Select a Gateway' dropdown menu.

Send Assessment Reminder

The below RAM trigger is an example of a simple trigger that sends an assessment reminder if the candidate hasn't taken the assessment within 72 hours of the assessment being initiated. Additional conditions and/or actions can be added to limit the candidate pool or to update the candidate's status if they failed to take the assessment in this timeframe.

Trigger Name:	Send Assessment Reminder	Trigger Type:	RAM
Triggering Mechanism:	Assessment Initiated	Triggering Item:	Standard Req_Std Approval
Trigger Delay (hrs):	72	Activated On:	Not Yet Activated
Trigger Context:	NA	Delay Mechanism:	Aging

Rule 1: Send assessment reminder to candidate

Conditions:

Standard
Form existence
Form Multiples - Not Applicable
KASOverallResult is False (yes)

Actions:

Send Communication
[View Details](#)

Update HR Status for Failure to Complete Assessments

The below RAM trigger is an example of a simple trigger that updates the candidate's HR status if they have not taken the assessment within the defined period of time. Additional conditions and/or actions can be added to limit the candidate pool that this occurs for or additional actions that can take place.

Trigger Name:	Failure to Complete Assessment	Trigger Type:	RAM
Triggering Mechanism:	Assessment Initiated	Triggering Item:	Standard Req_Std Approval
Trigger Delay (hrs):	96	Activated On:	Not Yet Activated
Trigger Context:	NA	Delay Mechanism:	Aging

Rule 1: Update HR Status for Failure to Complete Assessments

Conditions:

Standard
Form existence
Form Multiples - Not Applicable
KASOverallResult is False (yes)

Actions:

Send Communication
[View Details](#)

Update HR Status
HR Status = (Company Not Interested)

Copy Assessment Results When Submitted to Req

There are a variety of scenarios that this RAM trigger will assist with. The system will search for any assessments that are required for the receiving requisition and copy them, saving the recruiter the extra step of sending an assessment request:

- Candidate Search > File to Req:
- Req Folder > Move/Copy
- Application flow where assessments are not requested at the time of applying, but it's desired to view existing results within the receiving req; should they exist.
- RAM > Move/Copy candidate
- Candidate Import

Trigger Name: HR Status (Manually Filed)
Triggering Mechanism: HR Status
Trigger Delay (hrs): 0
Trigger Context: NA

Trigger Type: RAM
Triggering Item: Manually Filed
Activated On: Not Yet Activated
Delay Mechanism: Delayed Processing

Rule 1: Copy Assessment Results

Conditions: *No conditions available*

Actions:

Copy Assessment Results

Copy Assessment Results
