

# Onboarding - Understanding Automations

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## What is an Automation?

An automation is a directed graph of decision points and actions that runs when a specific event happens (for example, the automatic sending of an email once a task has been completed by a candidate). You define the trigger (e.g., "when a task's status changes"), and the automation walks through the graph by evaluating conditions, taking actions, and pausing at time nodes, all within a single execution path.

The screenshot displays the configuration interface for an automation, divided into four main panels:

- Placement Events:** Contains fields for 'Automation Name' and 'Email Notification'. A description states: 'This sends an email when a placement is created'. It also includes a 'Status' dropdown and a checkbox for 'Run on new placement creation'.
- condition\_1:** A rule configuration panel. It shows a condition: 'Name does not contain Candidacy'. A note below states: 'This branch runs when Name does not contain "Candidacy" (case sensitive)'. There are options to 'Add condition' and 'Add group'.
- action\_2:** An action configuration panel titled 'Create Onboarding Link'. It includes fields for 'Onboarding Link Type', 'Placement', 'Assignee Type', 'Employee', 'Locale', and 'Redirect To'. It also has a section for 'Optional URLs to redirect the user to upon completion'.
- action\_1:** An action configuration panel titled 'Send Email'. It includes fields for 'Email service', 'Onboarded Email Service', 'Email template', 'Theme', 'Send email to', 'Email subject', and 'Email body'. The email body contains a template with variables like `{{ employee.first_name }}` and `{{ employee.last_name }}`.

Without automations, you would need to manually create tasks, send emails, and monitor expiration dates. With Automations, those events (conditional task creation, link generation, reminders, compliance workflows) run consistently every time that event occurs.

Automations can be accessed via the Onboarding Portal > Configuration > Automations.

**\*Note\*** You will need to be a member of the "Admins" User Group to create and manage Automations.

For more information on permissions, please see the article titled [Onboarding - User Groups and Permissions](#).

## Nodes of an Automation

Automations consist of four different nodes that decide what happens and when:

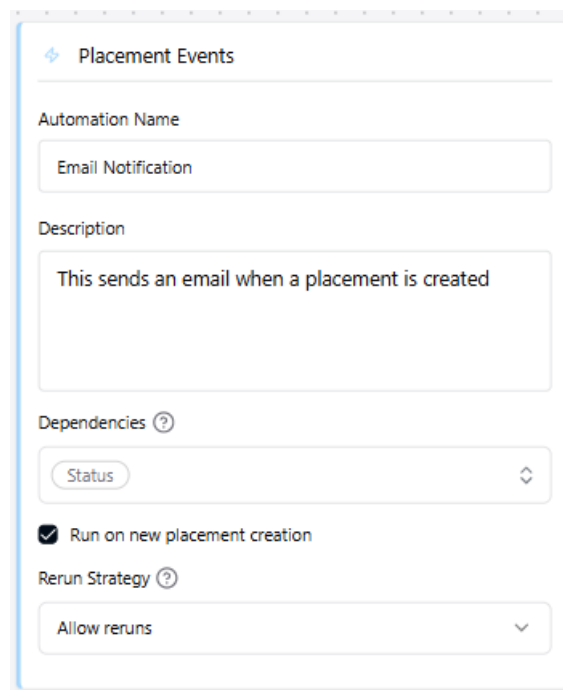
- Start (Trigger) Node
- Condition Node

- Action Node
- Time Node

## The Start (Trigger) Node

Every automation begins with a Start node. The Start node picks two things:

- Which entity to listen to (Entity Type)
  - Task: Includes "Status", "Next Action", "Due Date", and "Expiration Date"
  - Placement: Includes "Status"
- Which dependency change triggers the automation



Automations can also be triggered whenever a new record is created for that specific entity via the "Run on new record creation" checkbox:

### Trigger Settings

Automations continuously monitor changes to certain properties of an entity. Those properties are called "dependencies". Changes to one or more dependencies will trigger this automation.

#### Entity Type ?

Select entity type

☐ Run on new record creation

**\*Note\*** Always ensure the intended dependency is being selected. If you want an automation reacting to a task moving to a "Completed" status, choose "Status". If you choose the unintended dependency, "Due Date" for example, the automation will run every time the due date is edited, not when completion happens.

Trigger Settings

Automations continuously monitor changes to certain properties of an entity. Those properties are called "dependencies". Changes to one or more dependencies will trigger this automation.

Entity Type ?

Task

Dependencies ?

Select properties...

Q

Status

Next Action

Due Date

Expiration Date

Create

## The Condition Node

TheCondition node is an optional branching path within the graph. You write a rule using the same Rule Builder as Policies. If the rule is true, the automation takes one path; if false, it takes another.

Conditions let you send different emails to different people or create a task only if a placement is in a certain state. For more complex automations, conditions can be chained together.

condition\_1

Rules

OR

Any of the following must be true

Name

does not contain

Candidacy

Aa

+ Add condition

+ Add group

This branch runs when Name does not contain "Candidacy" (case-sensitive).

## The Action Node

The Action node simply does the action it is configured to execute including the sending of an email, the creation of a task, the generation of a link, etc.

 action\_1


Send Email


Email service

Onboarded Email Service


Email template \*

Onboarded - Content


Theme ?

No theme


Send email to

Employee


Email subject ?

New Onboarded Notification


Email body ?


Paragraph















Hi {{ employee.first\_name }} {{ employee.last\_name }},  
Please complete the forms in the onboarding link below.  
[Onboarding Link](#)  
Thank you,  
**Your Onboarding Team**

Dynamic Template Data

+ Add Template Field

The following actions can be configured via automations:

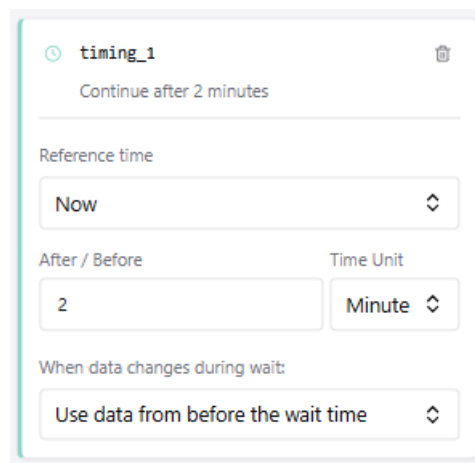
- Send Email
- HTTP Request
- Create Task
- Create Compliance Requirement
- Assign Task
- Create Onboarding Link
- Set Task Expiration

**\*Note\*** The "Set Task Expiration" action may require additional setup before becoming available as an option when creating an automation. Please contact TempWorks Support for more information.

Actions are where the automation gets work done. The output of one action (the link created by Create Onboarding Link) can become a variable that a later action uses. A single automation might create a task and then send an email with a link to that task's form.

## The Time Node

The Time node pauses the execution of the automation. When the automation reaches this node, execution stops and waits until the time condition is met.

The image shows a configuration window for a 'timing\_1' node. At the top, it says 'Continue after 2 minutes'. Below this, there's a 'Reference time' section with a dropdown menu currently set to 'Now'. Underneath, there are two input fields: 'After / Before' with the value '2', and 'Time Unit' with a dropdown set to 'Minute'. At the bottom, there's a section 'When data changes during wait:' with a dropdown menu set to 'Use data from before the wait time'.

The following time baselines can be configured via automations:

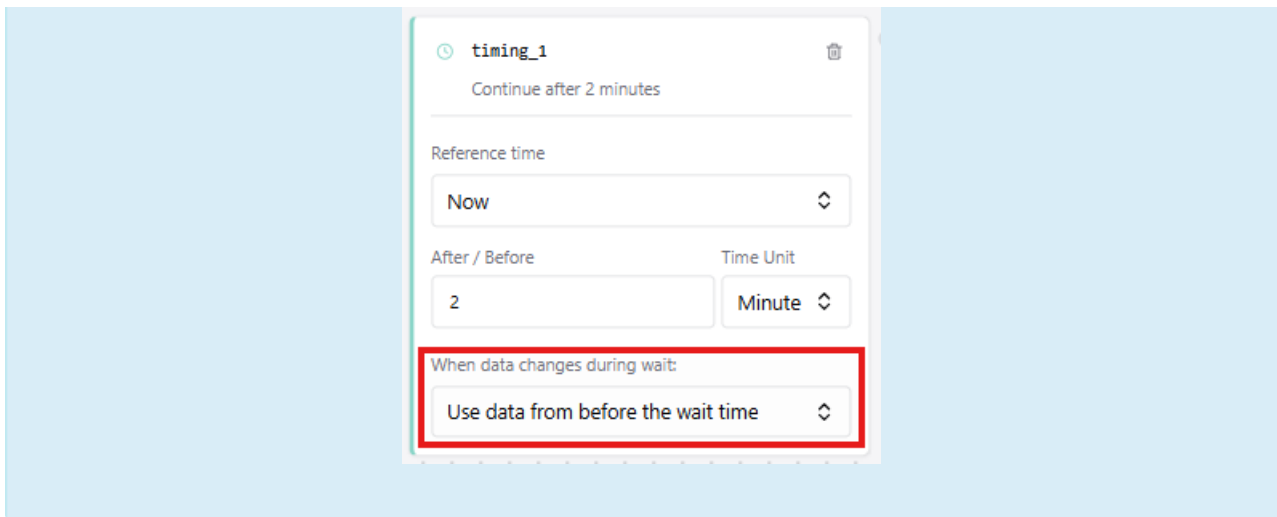
- **Now:** An offset from right now. "Wait 2 hours from this moment."
- **Task Expiration:** An offset from a task's expiration date. "Wait 3 days before the task expires."
- **Task Due Date:** An offset from a task's due date. "Wait 1 day before the task is due."

When the timer ends, execution of the automation resumes.

**\*Note\*** By default, the automation re-evaluates conditions and fact-based action parameters when the timer fires.

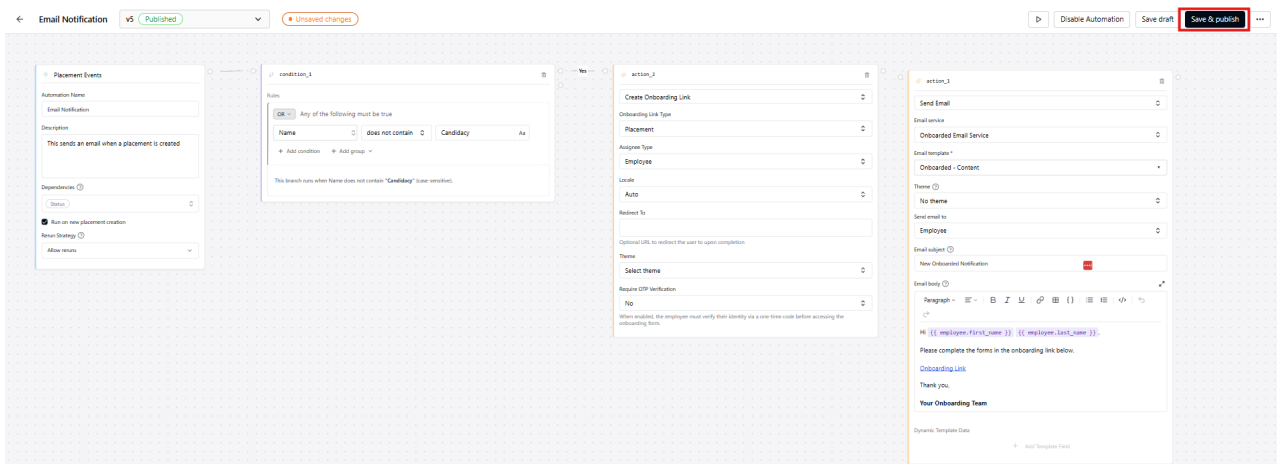
This matters in the event data has changed during the wait (a placement has moved to a new state), re-calculating picks up that change.

If you select "Use data from before the wait time" within the "When data changes during wait" dropdown, the automation uses the same facts (employee data, placement data) it had when it paused:



## Publishing Automations

When you're ready to activate an automation, select "Save & Publish" at the top right. The status changes to Published and the automation runs on every trigger match.



After publishing, you can continue editing the automation. Your edits auto-save while the live configuration continues to run on every trigger match. Select "Save & Publish" to apply your changes.

## Rerun Strategy

Rerun Strategy controls what happens when the trigger fires multiple times.

The Rerun Strategy can be configured either when initially creating an automation or within the Start "Trigger" Node.

You can select from the following options:

- **Allow Reruns:** Every trigger fires the automation independently. If the trigger fires twice, the automation runs twice, even if the first run is still in progress.
- **Do Not Allow Reruns:** The trigger only fires the automation if no other execution is currently active. Subsequent triggers are ignored.
- **Allow Reruns and Cancel Previous Runs:** A new trigger cancels any in-progress execution and starts fresh.

The screenshot shows the configuration for an automation named "Email Notification" triggered by "Placement Events". The description is "This sends an email when a placement is created". The dependencies are set to "Status". The checkbox "Run on new placement creation" is checked. The "Rerun Strategy" dropdown is open, showing four options: "Allow reruns", "Allow reruns and cancel previous runs", "Allow reruns" (which is selected and has a checkmark), and "Do not allow reruns".

## Related Articles