IBM Kenexa Lead Manager

IBM Kenexa Lead Manager Release Notes

April 2017

Note

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This edition applies to the April, 2017 IBM Kenexa Lead Manager and to all subsequent releases and modifications until otherwise indicated in new editions.

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Contents

Introduction

This document presents changes, both visible and configurable, included in the April, 2017 release of IBM Kenexa® Lead Manager.

The objectives of this document are to:

- Present feature enhancements and usability and performance improvements that are introduced in this release.
- Document changes in system requirements, if applicable.

Visible Changes

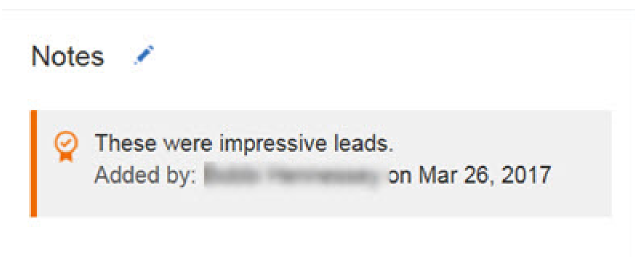
The current release of IBM Kenexa Lead Manager includes the following visible changes. Visible changes alter the appearance or performance of the product without requiring any configuration. The changes are immediately visible or available to users.

Add Notes Enhancements

Lead Manager now supports the ability to add **Notes** to multiple lead profiles simultaneously on the **Campaign Lead** grid, the **My Leads** grid, the **All Leads** grid, and the **Search results** grid.

Adding Notes to Multiple Leads

On the **Campaign Lead**, **My Leads**, **All Leads** grids, and **Search results** grid, Lead Manager users can now **Add notes** to multiple lead profiles simultaneously. Each added note displays the note content, who added the note, and the date the noted was added.

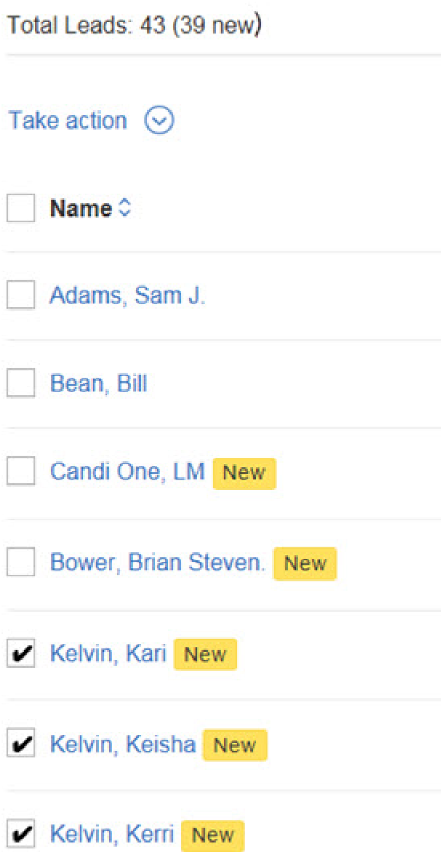


When a Lead Manager user adds notes to a lead's profile, the notes are added to any existing notes and all notes display in chronological order.

How to Add Notes to Multiple Lead Profiles

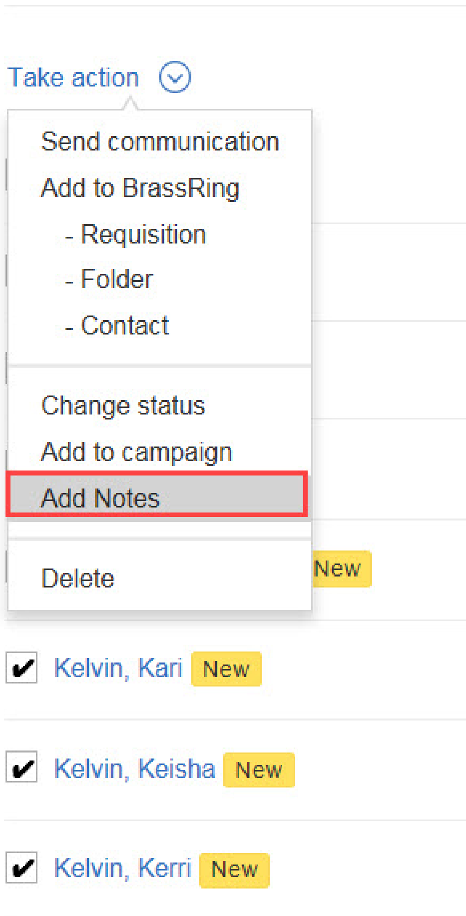
On the **Campaign Lead**, **My Leads**, **All Leads** grids, or the **Search results** grid, Lead Manager user:

- Selects the check box for multiple leads.

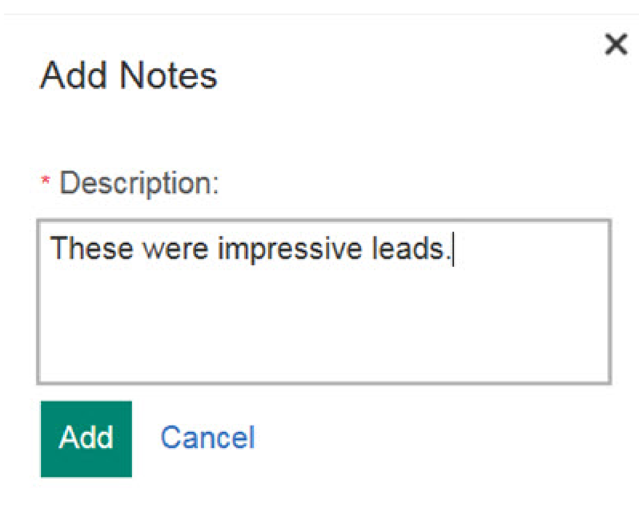


- Selects **Add Notes** from the **Take Action** menu.

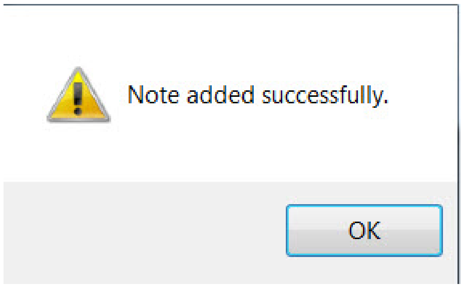
Action menu selection Add Notes is chosen to add notes to lead profiles.



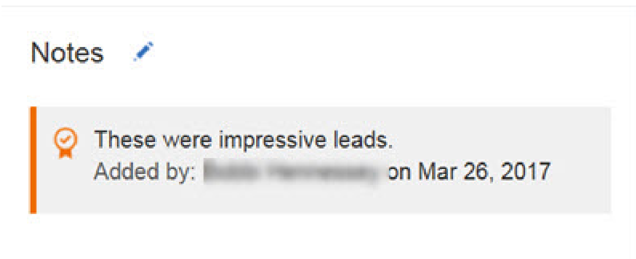
The **Add Notes** modal opens.



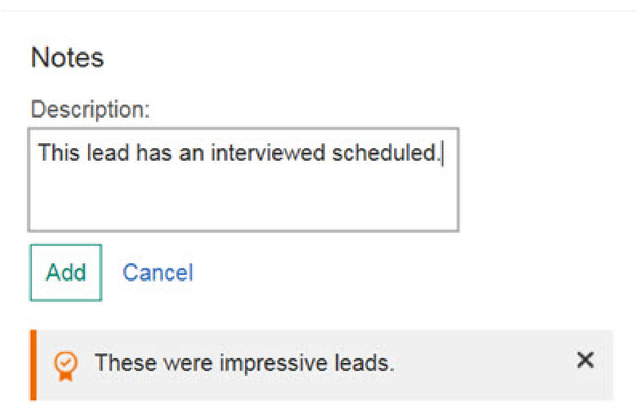
- Enters Note text into the **Description** text box.
- Selects **Add**. A confirmation modal displays.



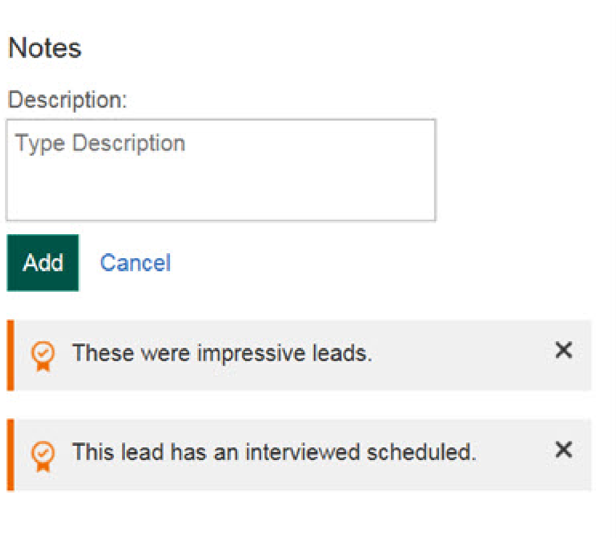
- Selects **OK**.
- Browses to one of the lead profiles to view the added note that displays the note content, the user's name who added the note, and the date the noted was added.



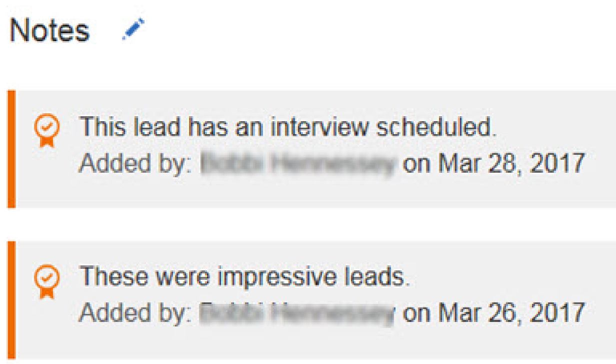
- Selects the pencil **edit** icon to add another note.



- Selects **Add**. The second note is added to the lead's profile.



- Select **Save** to save the lead Profile. The **Notes** redisplay and shows the note content, the user's name who added the note, and the date the noted was added.



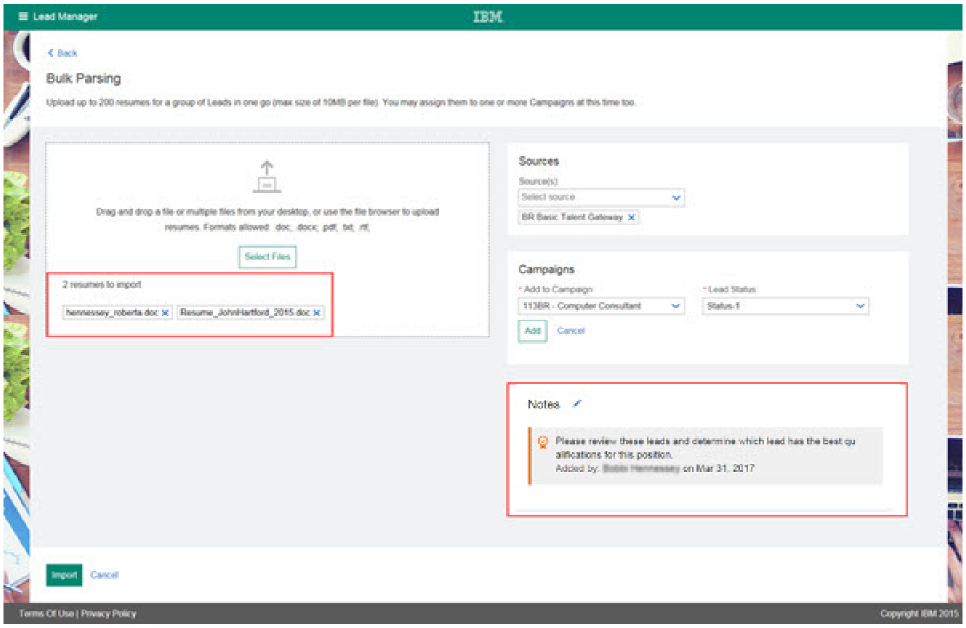
Add Notes - Bulk Parsing

Lead Manager users can now **Add Notes** during **Bulk Parsing**. When the **Add Notes** action is using during **Bulk Parsing**, the added note is added to all leads within that Bulk Parsing.

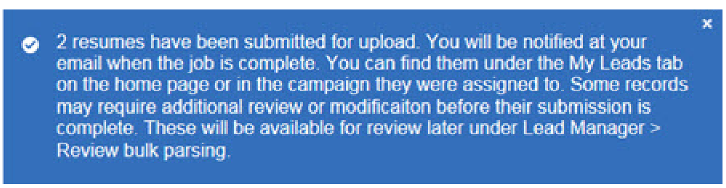
How to Add Notes to Bulk Parsing

Lead manager user browses to the main menu and selects:

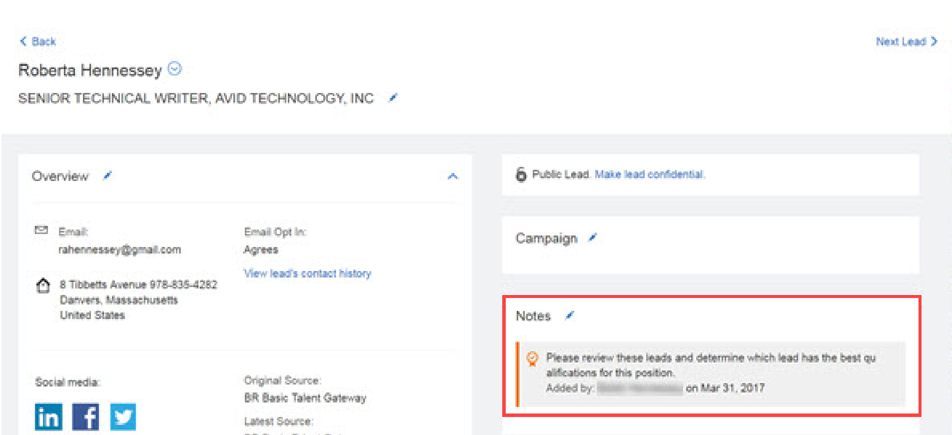
- **Add new** > **Bulk Parsing**.
- Selects resumes to upload and completes all **Bulk Parsing** fields.



- Selects **Add Notes** to add a note to both of the leads' reports.
- Selects **Add**.
- Selects **Import**. The **Bulk Parsing** screen refreshes and displays the **Bulk Parsing** message that indicates the import is in process and that an email is sent when the parsing completes.



- Receives email **Bulk Parsing** is complete.
- Browses to **Review Bulk Parsing**. Completes the Bulk Review process.
- Browses to **My Leads**.
- Selects the newly imported lead to verify that the note added during **Bulk Parsing** is visible in **Notes**.



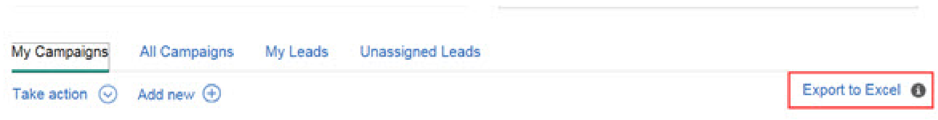
Export to Excel

The **Export to Excel** feature is now available on all **Campaign** grids. Lead Manager users can now export up to 10 pages of lead data with just one click!

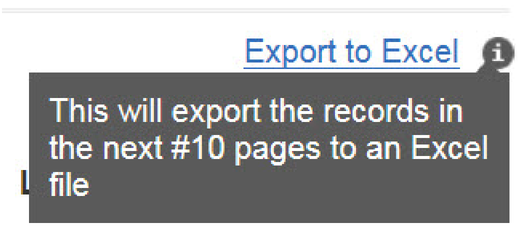
Export to Excel

Lead Manager users can now select **Export to Excel** on all Campaign grid pages. The **Export to Excel** feature exports the page that is shown plus the next nine pages.

When a Lead Manager user selects the **Export to Excel** information icon, a modal opens and



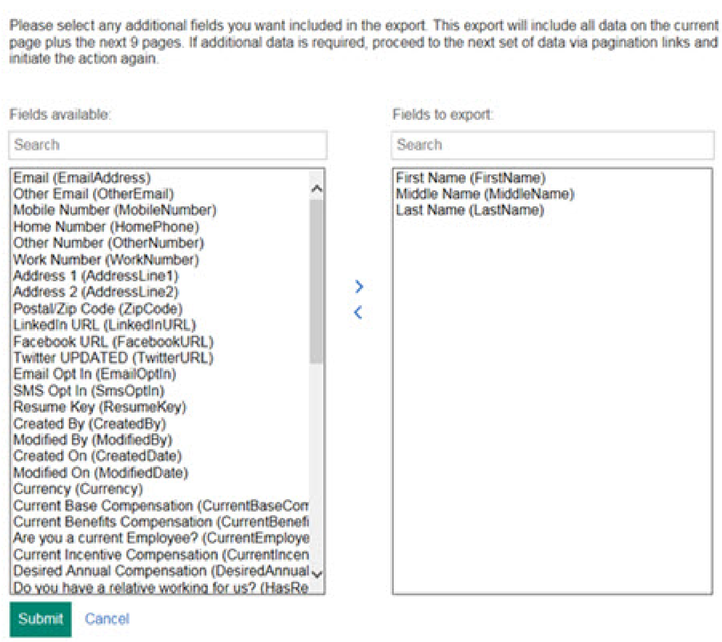
provides details about the export.



Using Export to Excel

A Lead Manager user:

- Selects **Export to Excel**. The **Add fields** modal opens. Users can add all active fields (excluding fields that are already shown on the grid).



- Selects additional fields and selects **Submit**.

When the export completes, an alert displays with the name of the **Exported file**. Lead Manager user can:

- Select **Save**, **Open**, or **Cancel**.

Note: If Lead Manager user want to export more pages, user can toggle to the next set (page 11, 21, 31) to continue the process. If Lead Manager users added additional fields for the first export, they must add the additional fields for each subsequent export.

Configurable Changes

The current release of IBM Kenexa Lead Manager including the following configurable features. Configurable features must be configured or turned on to be visible and available to users.

Lead Manager Publish

Workbench Tech Service users can now **Publish** Lead Manager staging environments to production. Please contact your IBM Kenexa representative to learn more about this **Publish** feature.

Lead Manager Publish Staging to Production

Workbench Tech Service users can now publish Lead Manager **Staging** environments to Lead Manager **Production** environments. When Lead Manager configurations are published from **Staging** to **Production**, content configurations in **Production** change according to their existing configuration and availability status.

When publishing from **Staging** to **Production**, the following outline describes how publishing impacts fields, missing or available, in target production environments.

When Fields are Missing in Target

Lead and Campaign Fields (Standard Fields)

- Option Groups, Options, and Options Localization Data, are added if the Field has Option Configured.
- User Type(s) - - associated with the fields will be added if missing (this will add just the shell of the User Type, for full User Type publish use the existing publish elements for User Types).
- Field, Localization Data, and User Type Privileges are added.

Lead and Campaign Fields (Custom Fields)

- Option Groups, Options and Options Localization Data, will be added if the profile fields have Options Configured.
- User Type(s) - associated with the fields will be added if missing (this will add just the shell of the User Type, for full User Type publish use the existing publish elements for User Types).
- Field(s), Localization Data, and User Type Privileges will be added.

Campaign Profiles (Custom Fields only)

- Option Groups, Options, and Options Localization Data, will be added if the Field has Option Configured.
- User Type(s) - associated with the fields will be added if missing (this will add just the shell of the User Type, for full User Type publish use the existing publish elements for User Types).
- Field(s), Localization Data and User Type Privileges will be added.

Lead Profiles (Custom Fields only)

- Option Goups, Options and Options Localization Data, will be added if the Field has Option Configured.
- User Type(s) - associated with the fields will be added if missing (this will add just the shell of the User Type, for full User Type publish use the existing publish elements for User Types).
- Field(s), Localization Data and User Type Privileges will be added.

List Grids

- Option Groups, Options, and Options Localization Data, will be added if the Field has Option Configured.

- User Type(s) - associated with the grids will be added if missing (this will add just the shell of the User Type, for full User Type publish use the existing publish elements for User Types).
- Standard Field(s), Localization Data And User Type Privileges will be added.
- Custom Field(s), Localization Data And User Type Privileges will be added.
- Grid Data and User Type Privileges will be added.
- Grid Columns and Localization Data will be added.

When Fields are Available in Target

Lead and Campaign Fields (Standard Fields)

- Option Groups, Options, and Options Localization Data will be added/updated if the Field has Option Configured.
- User Type(s) - will be added when missing..
- Field and Localization Data will be added/updated.
- User Type Privileges no longer applicable will be deleted and new user types added.

Lead and Campaign Fields (custom fields)

- Option Groups, Options, and Options Localization Data will be added if the Fields has Option Configured.
- Field and Localization Data will be added/updated.
- User Type Privileges will be added or deleted.

Campaign Profiles (Custom Fields)

- Option Groups, Options, and Options Localization Data will be added/updated if Field(s) on the Campaign Profile(s) has Option Configured.
- Field and Localization Data will be added/updated.
- User Type Privileges will be added or deleted.

Lead Profiles

- Option Groups, Options, and Options Localization Data will be added if the Fields has Option Configured.
- Field and Localization Data will be added.
- User Type Privileges will be added/updated.

List Grids

- Option Groups, Options, and Options Localization Data, if List Grid Field(s) has Option Configured.
- Standard Field and Custom Field(s), Localization Data And User Type Privileges will be added/updated.
- Add/Update Custom Field(s), Localization Data And User Type Privileges.
- Grid Data and User Type Privileges will be added.
- Grid Columns and Localization Data will be added/updated.

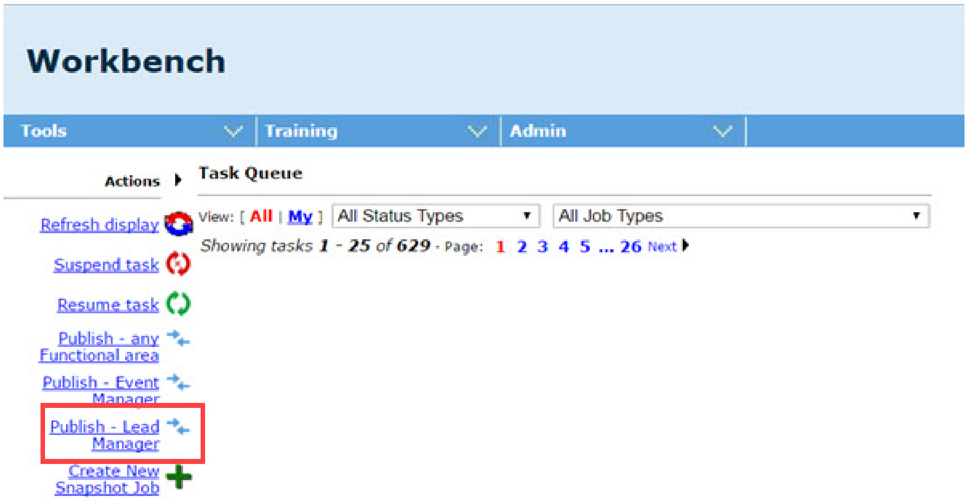
How do clients get this feature?

Workbench Tech Services users configure the **Publish** feature in BrassRing® Workbench.

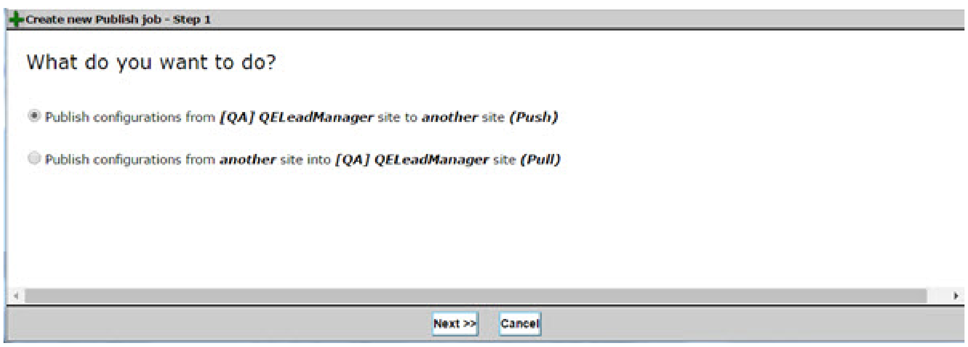
Configuring Publish

In Workbench, Workbench Tech Services users:

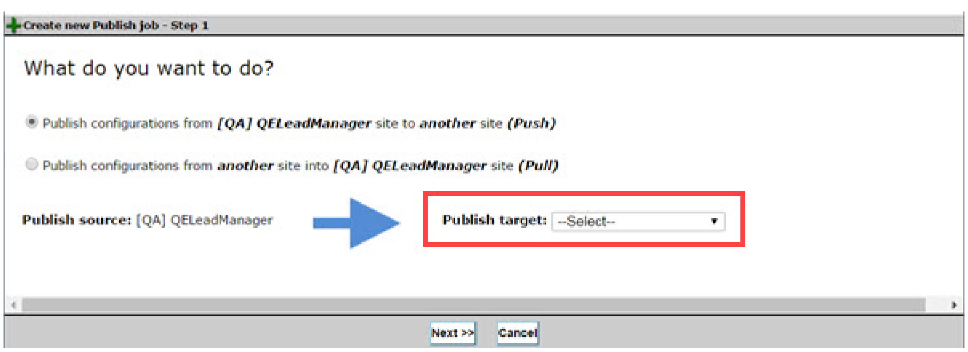
- Browse to **Tools** > **Task Manager** to open the Task queue page.
- Selects **Publish - Lead Manager**.



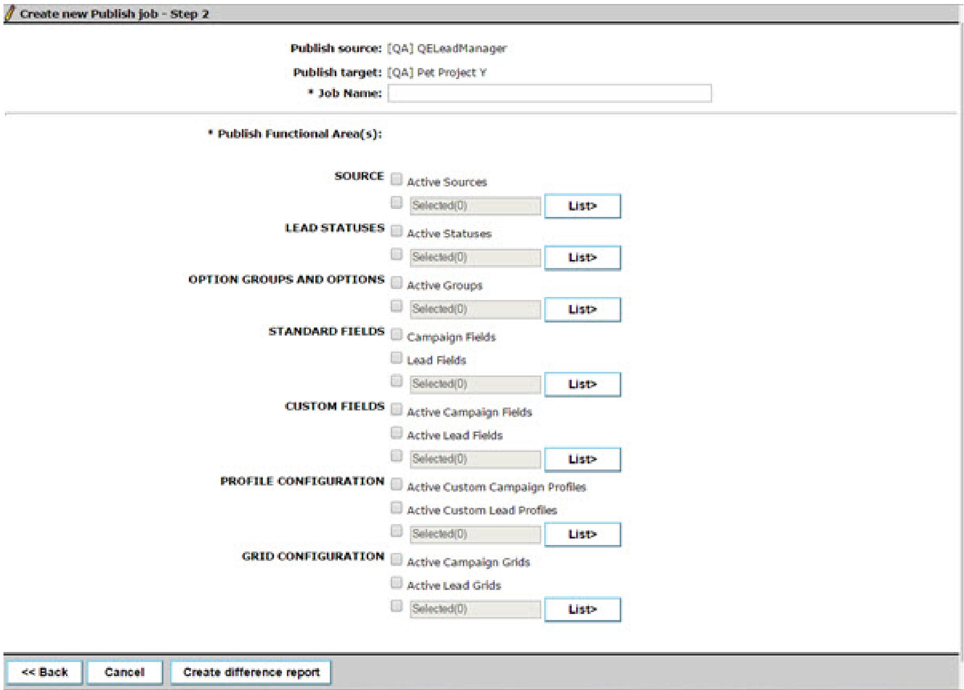
The **Create New Publish Job - Step 1** page opens.



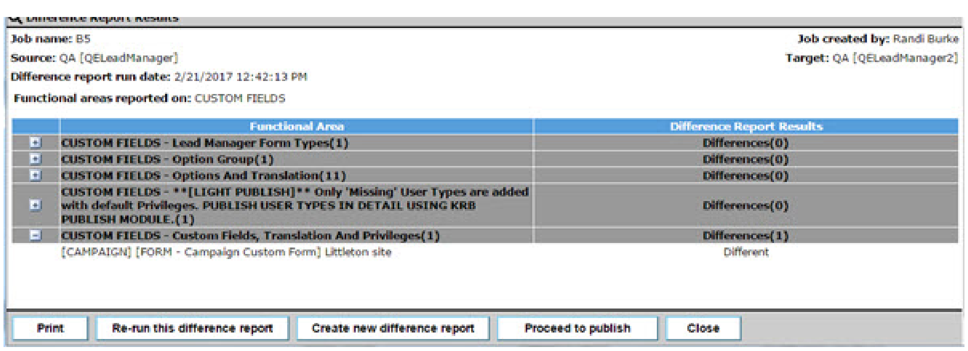
- Selects **Publish configuration from Staging to Production (Push)**.
- Selects **Next**. The **Create New Publish Job - Step 1** page refreshes and displays the selection.



- Selects their production environment in the drop-down menu for **Publish target**.
- Selects **Next**. The **Create New Job Publish job - Step 2** modal opens.



- Enters a **Job name** to identify this publishing instance.
- Selects either **Active** or **List** to open the selections list for each of the publishing areas:
  - **Source**
  - **Lead statuses**
  - **Options Groups and Options**
  - **Standard Fields**
  - **Custom Fields**
  - **Profile Configuration**
  - **Grid Configuration**
- Selects **Create Difference Reports**. The **Difference Report** generates.
- Browses to Task Queue page and selects the radio button for their Publish Job and selects the binocular icon to view the **Difference Report**. The **Difference Report** opens.
  Lead Manager Administrator can select the **plus** for each section in to view the publishing



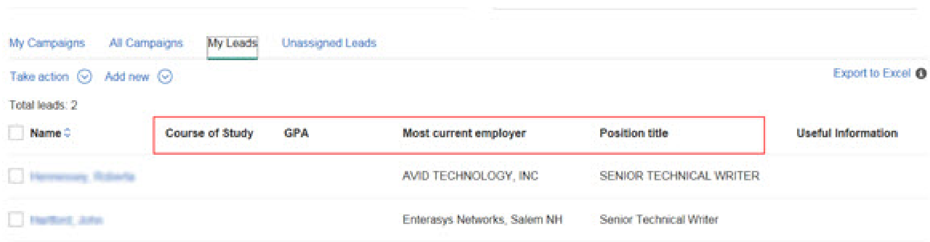
  content for that selection.
- Selects the **Proceed to Publish**. Alternatively, Lead Manager Administrator can select **Print**, **Re-run this difference report**, **Create new difference report**, or **Close**. The Lead Manager publishing process continues. When the publish completes, the **Status** for the publish changes to **complete** on the Task Queue page.

Display Education and Work History

BrassRing Workbench Administrators can now configure **Education** and **Work History** lead fields to display on **Lead** grids.

Education and Work History Lead Fields

Workbench Administrators can now configure **Education** and **Work History** fields to display on lead grids and assign those fields custom labels.



Note: If a lead profile does not contain information for the selected **Education** or **Work History** field, no content displays for the selected field on the **Lead Profile Grid**. The most recent **Education** or **Work History** data displays on the grid.

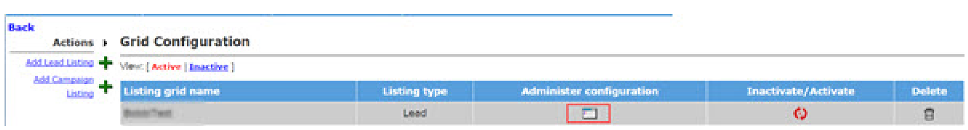
How do clients get this feature?

The display of **Education** and **Work History** fields on Lead grids is controlled by the BrassRing Workbench **Administer Lead Fields** action. This configuration requires Workbench Administrators to Administer (add) **Leads** fields and then to configure the **Lead Listing Grid** to include the **Education** and **Work History** Lead Fields.

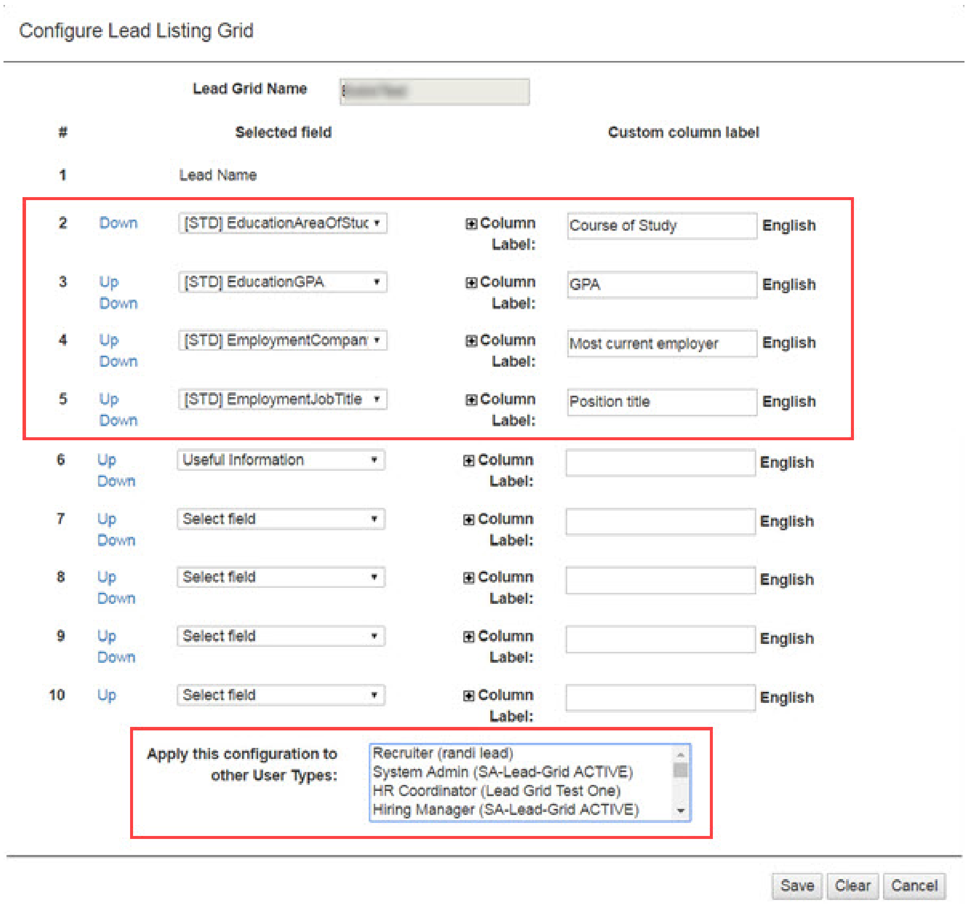
Configuring Lead Listing Grids

In BrassRing Workbench, Workbench Administrator:

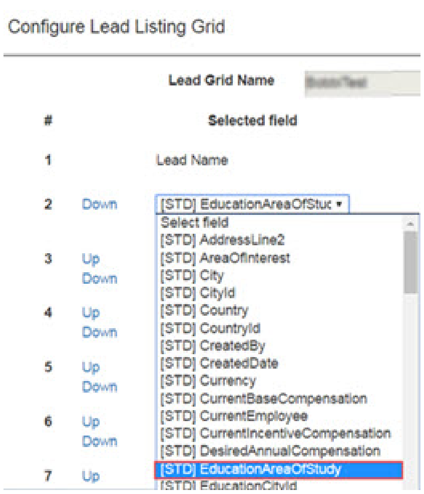
- Browses to **Tools** > **Lead Manager**. The Lead Manager page opens.
- Selects **Configure Listing Grids**. The Grid Configuration page opens.
- Selects **Administer** configuration icon for your **Lead listing**.
  The Configure Lead Listing Grid modal opens. The **Education** and **Work History** fields now



display in the **Configure Lead Listing Grid** modal.



- Selects **Education** and **Work History** fields by selecting the down arrow in each lead field.



- Inputs **Custom Label** text for each **Education** and **Work History** field.

  Note: Workbench Administrator must repeat this process for each **Education** and **Work History** field they want added to the **Lead Listing Grid**.
- Selects other user types who can view this **Lead Listing Grid** in the **Apply this configuration to other User Types** section.
- Selects **Save**.

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