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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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.

Notes
These were impressive leads.
Added by: on Mar 26, 2017

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

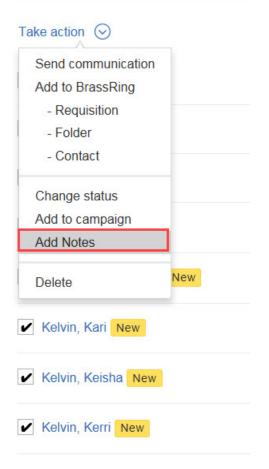
On the **Campaign Lead**, **My Leads**, **All Leads** grids, or the **Search results** grid, Lead Manager user:

• Selects the check box for multiple leads.

Total Leads: 43 (39 new)
Take action 📀
Name 🗘
Adams, Sam J.
Bean, Bill
Candi One, LM New
Bower, Brian Steven. New
Kelvin, Kari New
✓ Kelvin, Keisha New
Kelvin, Kerri New

• 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.

Add Notes

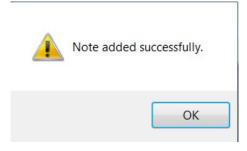
×

* Description:

These were impressive leads.

Add Cancel

- 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.

Notes	
Description:	
This lead has an interviewed scheduled.	
Add Cancel	
Y These were impressive leads.	×

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

Notes

Description:	
Type Description	
Add Cancel	
Y These were impressive leads.	×
Yhis lead has an interviewed scheduled.	×

• 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.

This lead has an interview scheduled. Added by: 0 on Mar 28, 2017

Added by: Mar 26, 2017

Add Notes - Bulk Parsing

Notes 💉

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.

lulk Parsing	
pload up to 200 resumes for a group of Leads in one go (max size of 10MB per file). You may assign them t	o one or more Campaigns at this time too.
Chag and drop a file or multiple files from your desktop, or use the file browser to upload resumes. Formats allowed doc, dock, pdf, lot, rff,	Sources Source(s) Select source BR Basic Talent Cathway X
Select Files 2 resumes to import [nemessay_roberts doc x.] [Resume_solveHartloid_2015.doc x.]	Campaigns *Add to Campagn 113BR - Computer Consultant Add Cancel
	Notes Places review these leads and determine which lead has the best quarter of the postion. Added by: Butter memory on Mar 31, 2017

- 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.

2 resumes have been submitted for upload. You will be notified at your email when the job is complete. You can find them under the My Leads tab on the home page or in the campaign they were assigned to. Some records may require additional review or modification before their submission is complete. These will be available for review later under Lead Manager > Review bulk parsing.

- 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**.

berta Hennessey 😔 NIOR TECHNICAL WRITER, AV	/ID TECHNOLOGY, INC 📝		
Overview 🙎		^	Public Lead. Make lead confidential.
Email: rahennessey@gmail.com 8 Tibbetts Avenue 978-835-4282 Darwers, Massachusetts United States	Email Opt In: Agrees View lead's contact history		Campaign 🖌
Social media:	Original Source: BR Basic Talent Gateway Latest Source:		Please review these leads and determine which lead has the best qu alifications for this position. Added by: on Mar 31, 2017

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!

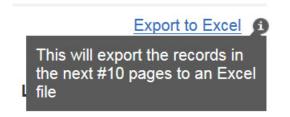
Export to Excel

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

My Campaigns	All Campaigns	My Leads	Unassigned Leads	
Take action 📀	Add new			Export to Excel

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).

Please select any additional fields you want included in the export. This export will include all data on the current page plus the next 9 pages. If additional data is required, proceed to the next set of data via pagination links and initiate the action again.



• 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.

ools	\sim	Training	\sim	Admin	~	
Actions	Task (Queue				
Refresh display	View: [All My] All Stat	us Types	 All Job Types 		
Suspend task	Showir	ng tasks 1 - 25 of	629 · Page: 1	2 3 4 5 26 Next	•	
Resume task						
Publish - any	+					
Publish - Event -	(

The Create New Publish Job - Step 1 page opens.

What do you want to do?	
Publish configurations from [QA] QELeadManager site to another site (Push)	
Publish configurations from another site into [QA] QELeadManager site (Pull)	

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

Create new Publish job - Step 1		
What do you want to do?		
Publish configurations from [QA] QELeadManager site	e to another site (Push)	
Publish configurations from <i>another</i> site into [QA] QEL	LeadManager site (Pull)	
Publish source: [QA] QELeadManager	Publish target:Select	
4		
	Next >> Cancel	

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

Publish source:	[QA] QELeadManager		
Publish target:	[QA] Pet Project Y		
* Job Name:			
* Publish Functional Area(s):			
SOURCE	Active Sources		
	Selected(0)	List>	
LEAD STATUSES	Active Statuses		
	Selected(0)	List>	
OPTION GROUPS AND OPTIONS	Active Groups		
	Selected(0)	List>	
STANDARD FIELDS	Campaign Fields		
	Lead Fields		
	Selected(0)	List>	
CUSTOM FIELDS	Active Campaign Fiel	ds	
	Active Lead Fields		
	Selected(0)	List>	
PROFILE CONFIGURATION	Active Custom Camp	aign Profiles	
	Active Custom Lead	Profiles	
	Selected(0)	List>	
GRID CONFIGURATION	Active Campaign Gri	ds	
	Active Lead Grids		
	Selected(0)	List>	

- 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

ob nan	ne: B5	Job created by: Randi Burke		
ource:	QA [QELeadManager]	Target: QA [QELeadManager2		
ifferen	ce report run date: 2/21/2017 12:42:13 PM			
unctio	nal areas reported on: CUSTOM FIELDS			
	Functional Area	Difference Report Results		
•	CUSTOM FIELDS - Lead Manager Form Types(1)	Differences(0)		
	CUSTOM FIELDS - Option Group(1)	Differences(0)		
	CUSTOM FIELDS - Options And Translation(11)	Differences(0)		
۰	CUSTOM FIELDS - **[LIGHT PUBLISH]** Only 'Missing' User Types are added with default Privileges. PUBLISH USER TYPES IN DETAIL USING KRB PUBLISH MODULE.(1)	Differences(0)		
-	CUSTOM FIELDS - Custom Fields, Translation And Privileges(1)	Differences(1)		
	[CAMPAIGN] [FORM - Campaign Custom Form] Littleton site	Different		

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.

My Campaigns	All Campaigns	My Leads	Unassigned Leads			
Take action 💿	Add new 💿					Export to Excel
Total leads: 2						
Name 0	Course	e of Study	GPA	Most current employer	Position title	Useful Information
i Hermony R	derfa			AVID TECHNOLOGY, INC	SENIOR TECHNICAL WRITER	
D Hartberg, John				Enterasys Networks, Salem NH	Senior Technical Writer	

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

Actions >	Grid Configuration					
Add Lead Listing	Mex [Active Inactive]					
Listing	Listing grid name	Listing type	Administer configuration	Inactivate/Activate	Delete	
	Build/Text	Lead		0	8	

display in the Configure Lead Listing Grid modal.

		Lead Grid Name	and the			
#		Selected field			Custom column la	bel
1		Lead Name				
2	Down	[STD] EducationAreaOfSt	uc •	Column Label:	Course of Study	English
3	Up Down	[STD] EducationGPA	٠	Column Label:	GPA	English
4	Up Down	[STD] EmploymentCompa	an •	E Column Label:	Most current employer	English
5	Up Down	[STD] EmploymentJobTiti	e *	E Column Label:	Position title	English
6	Up Down	Useful Information	•	E Column Label:		English
7	Up Down	Select field	٣	E Column Label:		English
8	Up Down	Select field	•	E Column Label:		English
9	Up Down	Select field	•	E Column Label:		English
10	Up	Select field	٠	E Column Label:		English
		Apply this configuration to other User Types:	System HR Co	ter (randi lead) n Admin (SA-Lead-G ordinator (Lead Grid Manager (SA-Lead-	Test One)	

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

		Lead Grid Name
#		Selected field
1		Lead Name
2	Down	[STD] EducationAreaOfStuc •
		Select field
		[STD] AddressLine2
3	Up	[STD] AreaOfinterest
	Down	[STD] City
		[STD] CityId
4	Up	[STD] Country
	Down	[STD] Countryld
		[STD] CreatedBy
5	Up	[STD] CreatedDate
	Down	[STD] Currency
		[STD] CurrentBaseCompensation
6	Up	[STD] CurrentEmployee
	Down	[STD] CurrentIncentiveCompensation
		[STD] DesiredAnnualCompensation
7	Up	[STD] EducationAreaOfStudy

• 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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