IBM Kenexa Lead Manager

IBM Kenexa Lead Manager Release Notes

February 2017

Note

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

This edition replaces XX99-9999-99.

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Contents

Introduction

This document presents changes, both visible and configurable, included in the February 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

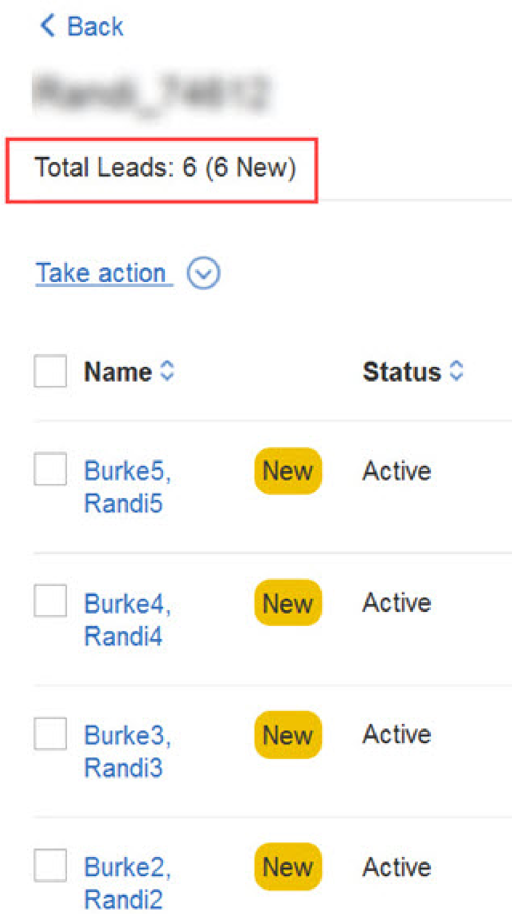
The current release of Lead Manager includes the following visible changes. Visible changes alter the appearance or performance of the product without requiring any configuration. The changes are immediately visible or available to users.

New Lead Indicator

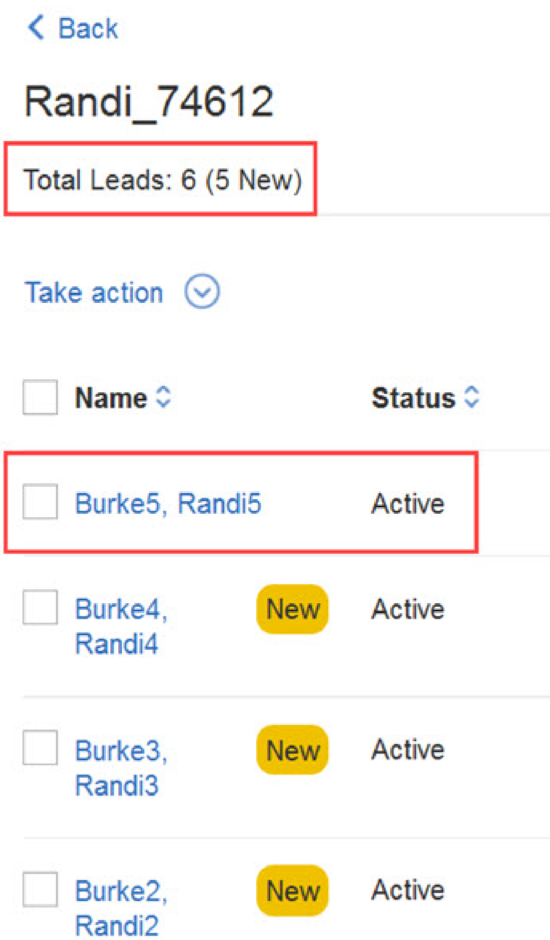
Lead Manager now supports a **New Lead** indicator on the Lead Listing page for leads who are new **within a campaign** for the logged-in user. The **New Lead** indicator represents all new leads that the Lead Manager user has not seen previously **within** that campaign. This release also introduces a **New Lead** count on the **My Campaigns** and **All Campaigns** pages.

New Lead Indicator

When Lead Manager users view lists of leads within a Campaign, a **New Lead** indicator displays next to the lead's name if the user has not viewed the lead's profile for that specific campaign. The **Total Leads** count displays on the **My Campaigns** and **All Campaigns** pages. The **Total Leads** count shows the total lead count and the new leads count. In the following example, the count for both total leads and new leads is 6.



When the Lead Manager user selects the new lead and views that lead's profile, the lead indicator is removed from the lead's name and the **Total Leads** count for new leads changes to reflect that the lead is no longer considered new. In other words, lead count for new leads decreases by one. If a lead is filed to multiple campaigns, a **New Lead** indicator displays next to the lead's name in each campaign until the profile is viewed within the campaign. For example, if John Smith is filed to Campaign A and Campaign B, when a user views the profile for John Smith in Campaign A, the **New Lead** indicator still appears next to John's name in Campaign B until the user views the profile in Campaign B.



Lead Manager Search - Lead Name Enhancement

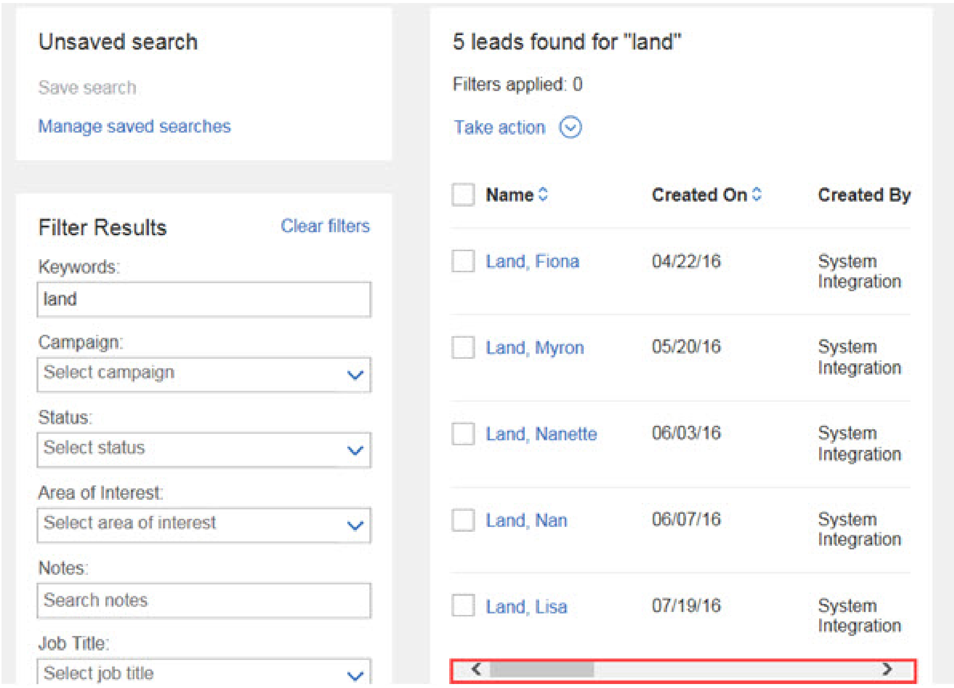
Lead Manager **Lead Name** search now supports a 2-character search. Formerly, if a Lead Manager user entered fewer than 3 characters in **Lead Name** search, a modal displayed requesting the user enter at least 3 characters into the search box.

Lead Name 2-character search
: Lead Manager users can now enter 2 characters when they use the **Lead Name** search.

Search Results Page Enhancement

The **Lead** and **Lead name** search results page now has a scroll bar.

Search Results Page - Scroll bar
: On the Lead Manager **Lead** and **Lead name** search results pages, a new scroll bar provides a scroll bar for access to leads for all responsive pages.



Configurable Changes

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

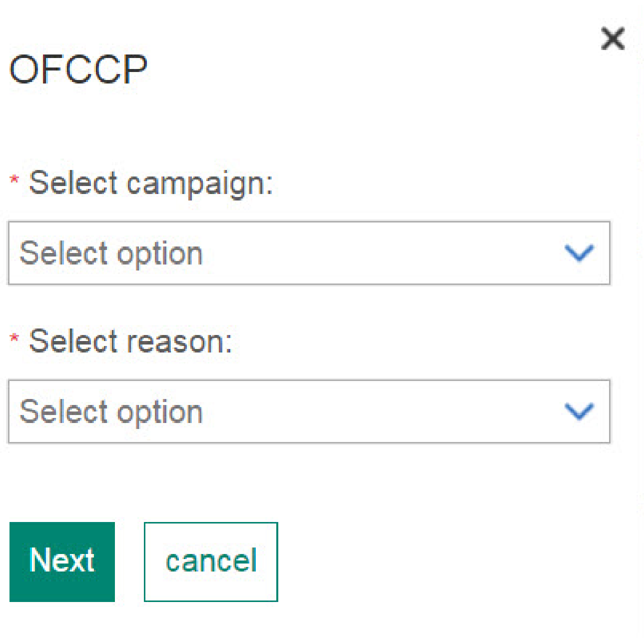
Office of the Federal Contract Compliance (OFCCP)

Lead Manager now supports OFCCP compliance for **Lead** searches. When Lead Manager users search for candidates by using **Lead Profile** or **Lead Name**search, they must now select a campaign or a reason for their search. Search campaign and reason criteria are tracked for the event and is stored for clients.

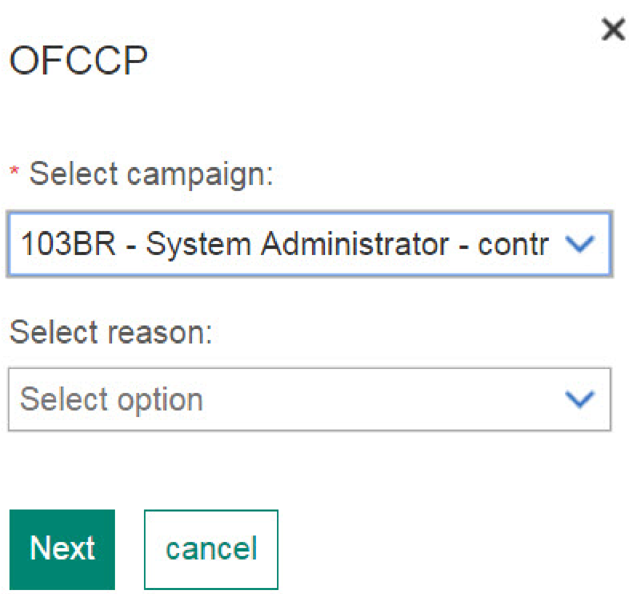
OFCCP

When the OFCCP compliance feature is configured, Lead Managers who activate **Lead** or **Lead name** searches must select either a **Campaign** or a **Reason** for their **Lead Profile** searches. Lead Manager users logs in to **Lead Manager** and:

- Selects **Lead** or **Lead name** in the search box and selects the search icon. The OFCCP modal opens.



- Selects an option for a **Campaign** or a **Reason.**



- Selects **Next**. The search results page opens.

How do clients get this feature?

The Lead Manager OFCCP search is supported by a BrassRing® Workbench setting and a **Search require reason (OFCCP)** user type privilege.

About this task

This feature requires a Lead Manager Workbench configuration and a new user type privilege.

Procedure

Workbench Setting

1. In **Workbench**, browse to **Lead Manager** > **Tools** > **Manage Search Reasons**.
2. Select **Add new search reason** or select **Edit** to edit an existing reason.
3. Select **Save**.

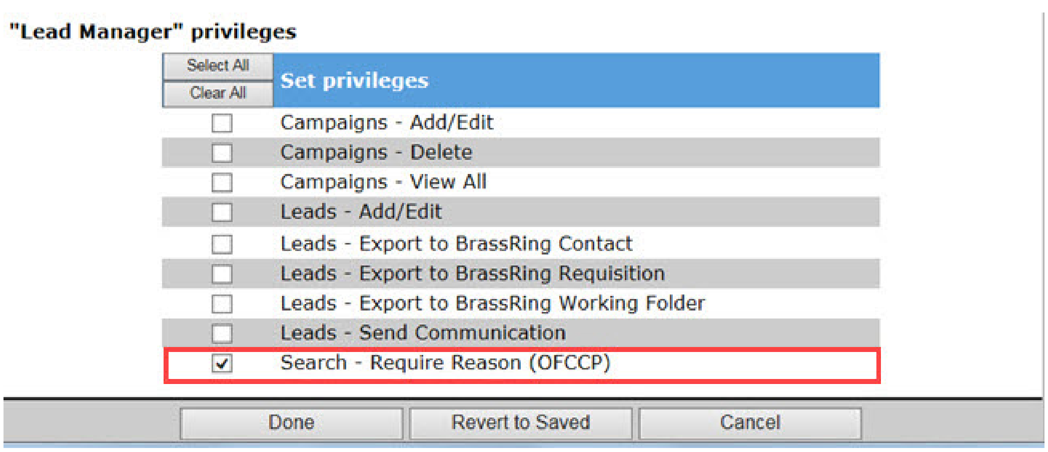
Configuring Search Reasons

4. Browse to **Tools** > **Users** > **Manage Search Reason**.
5. Select **Add New Search Reason**. The Configure Search Reason modal opens.

6. Enter a search reason in the **Description** text box.
7. Select **Save**.

User Type Privilege

8. Browse to **Tools** > **Users** > **User Types** > **Edit Type Permission** > for your user.
9. Select the pencil icon for **Lead Manager**.
10. Select the check box for **Search - Require Reason (OFCCP)**.



11. Select **Done**.
12. Select **Save**.

Synchronizing Lead Custom Fields with IMC

Lead Manager now supports the synchronization of **Lead Profile** custom fields with IBM Marketing Cloud (IMC). This feature is in addition to the current support of standard fields. Clients can now ask custom questions on landing pages and view the lead's answers in Lead Manager.

Lead Manager and IMC Custom Fields Synchronization.

Lead Manager Administrators can now configure custom lead fields to synchronize with IBM

Marketing Cloud. When Lead Manager Administrators create new custom lead fields in BrassRing Workbench, they can now use a new attribute **Synchronize with Marketing Cloud** to synchronize custom lead fields.

The following custom Lead fields are supported:

- **Text**Text
- **Single-select**
- **Multi-select**
- **Numeric**
- **Date**
- **Check box**
- **Radio button**

Text area custom fields and custom fields that require the user of relational tables such as Campaign/Status, Work History, Education are not supported.

How do clients get this feature?

Lead Manager feature, **Synchronizing Lead Custom Fields with IMC** Synchronizing Lead Custom Fields with IMC feature is supported by a BrassRing Workbench **Administer Lead Fields** attribute. Feature configuration requires the configuration of custom fields in BrassRing Workbench and in IBM Marketing Cloud.

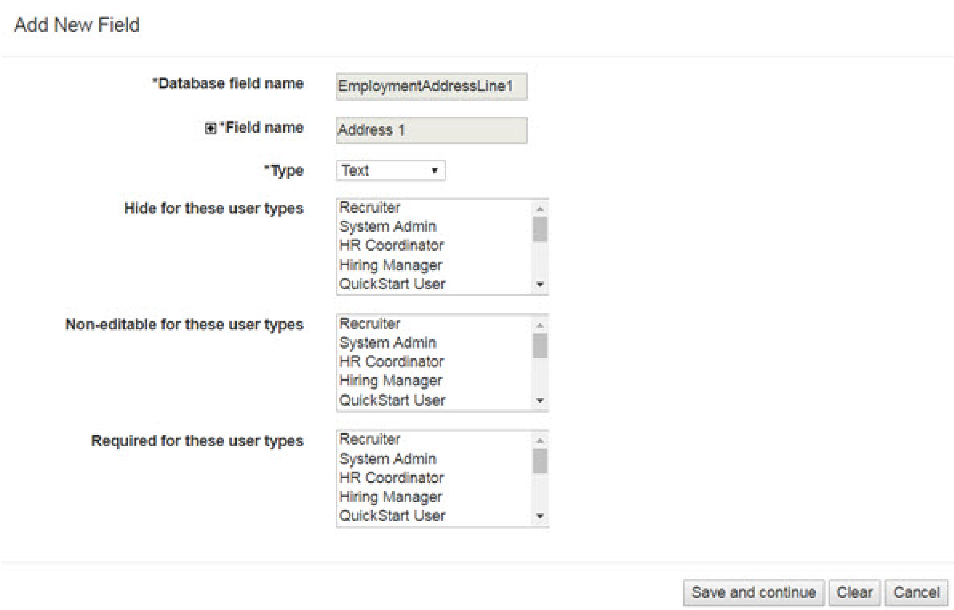
For standard fields that are already set to synchronize, in the Administer Lead Fields page, the **Sync with Marketing Cloud** column displays a **Yes** value and on the Define Field Attributes modal the check box for **Synchronize with Marketing Cloud** displays as checked and disabled. Unsupported fields display with the check box for **Synchronize with Marketing Cloud** unchecked and disabled.

Note: When you add custom fields, you must meet the following requirements:

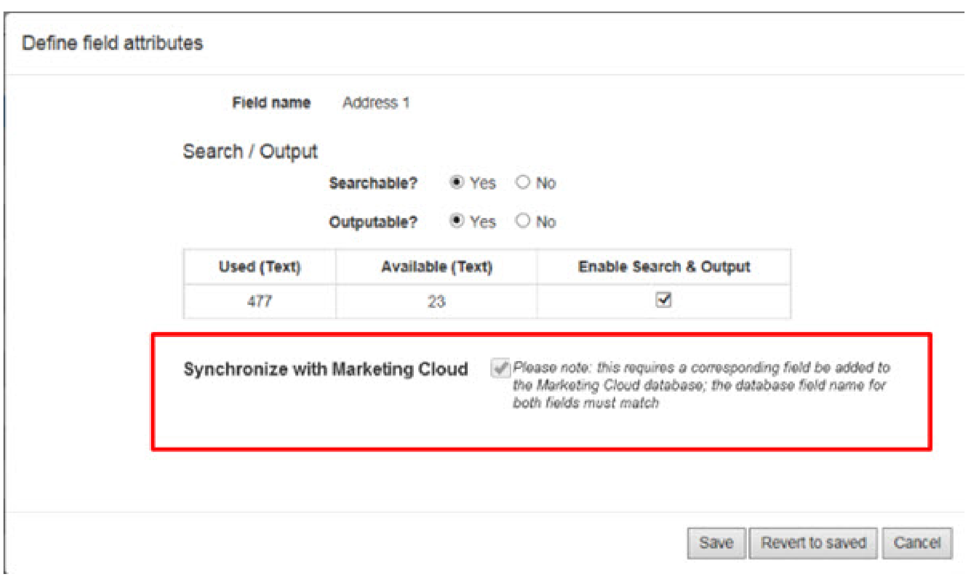
- Each new custom field must have a corresponding field in the IMC and the field names in IMC must be an exact match with the database field name in Workbench. Names are case-sensitive.
- Fields with options must include matching options. The options in IMC must match the option code that is found in Workbench. A custom label can be created on landing pages for a more user-friendly description if needed.

Adding Lead Custom Fields

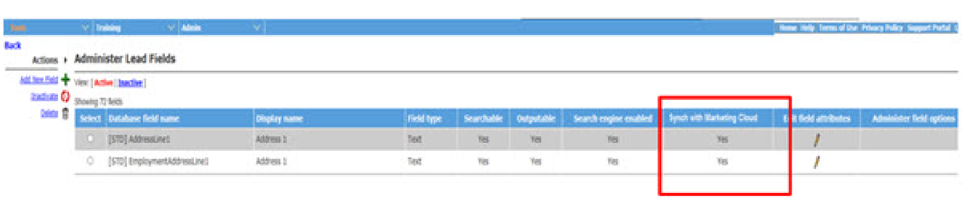
- In **Workbench**, browse to **Lead Manager** > **Administer Lead Fields**.
- Select **Add new field** or edit an existing field. The Add New Field page opens.



- Complete all attributes for the new custom field.
- Select **Save and continue**. The **Define field attributes** page opens.



- Complete all required fields and select the check box for **Synchronize with Marketing Cloud**.
- Select **Save**. The Administer Lead Fields page displays a **Yes** in the **Synch with Marketing Cloud** column for the newly created and synchronized custom field.



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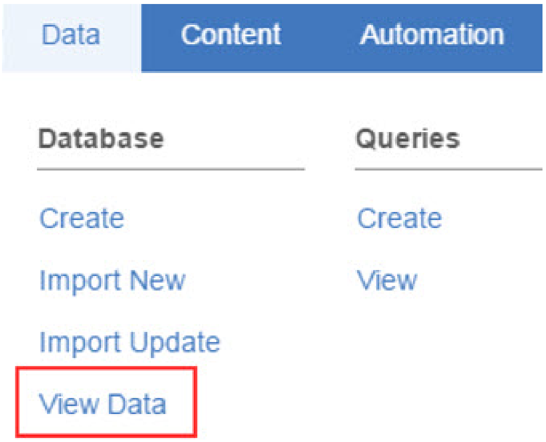
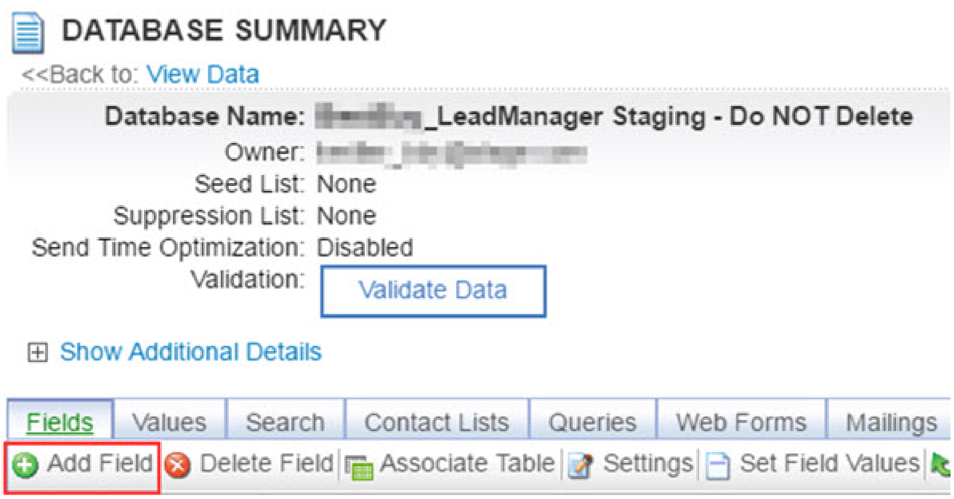
Configuring Fields in IBM Marketing Cloud

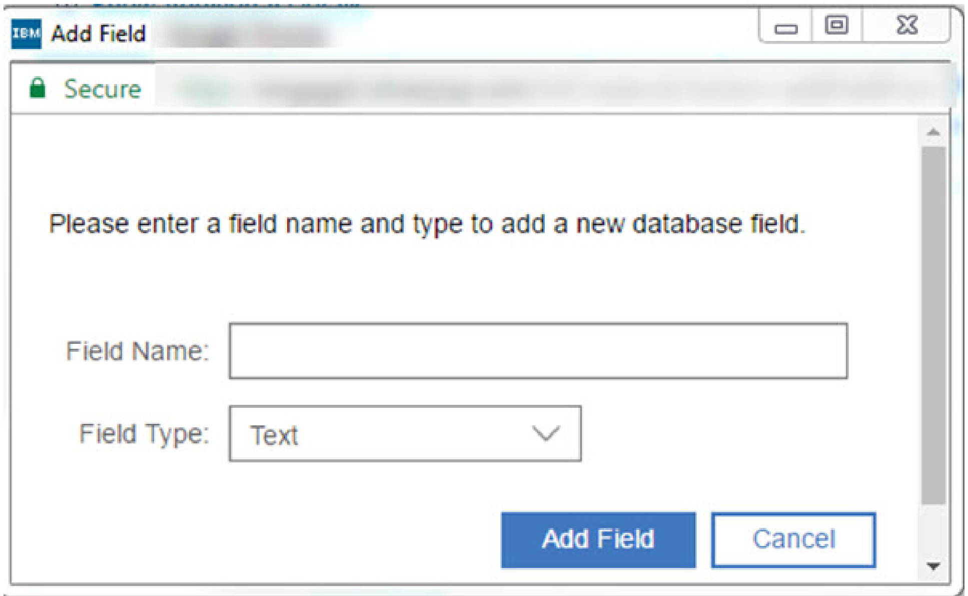
Use these steps to configure custom fields in IBM Marketing Cloud.

- In **IBM Marketing Cloud**, browse **Home** > **Data** > and select **View Data**.



- Select the database name for Your Lead Manager to view the database.
- Select **Add Field**.
  The **Add Field** page opens.



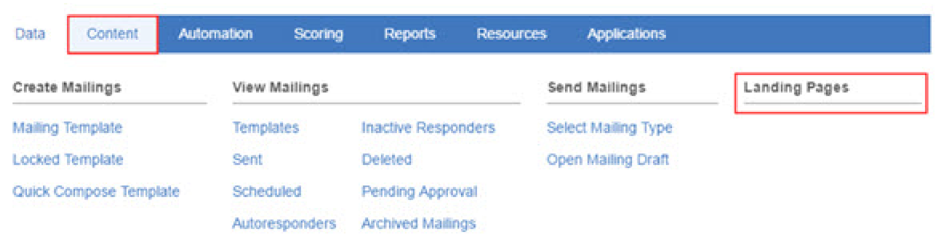


- Enter the **Field name**. The Field name must exactly match the BrassRing Workbench database field name, and be of the same field type as the field in Brassring Workbench. If the field is a selection list, you must enter the options to match the option list from BrassRing Workbench. You must also enter the option code from Workbench.
- Select **Add Field** when complete.

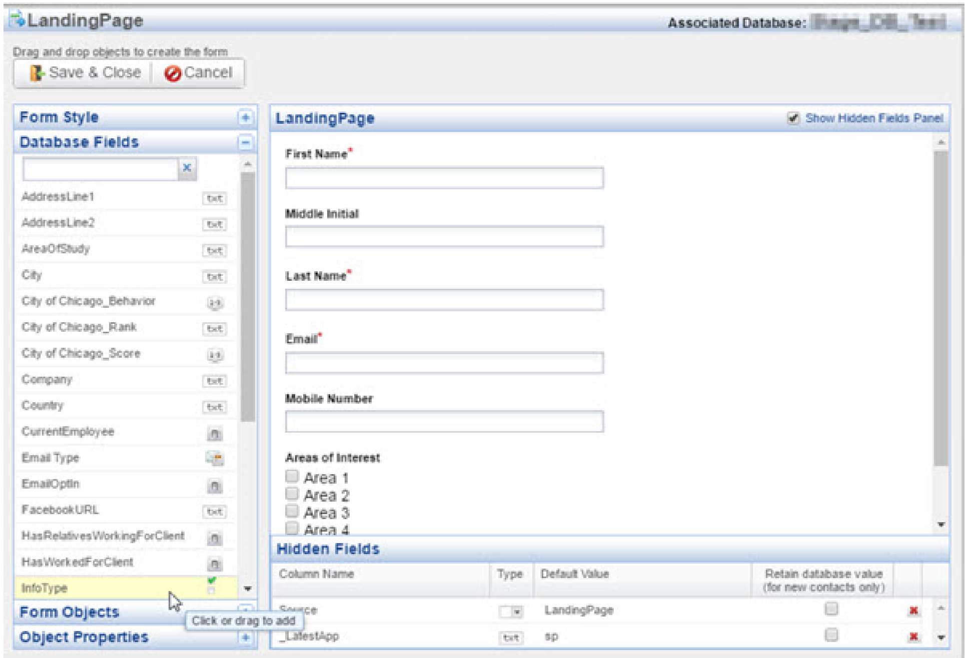
Add fields to IMC Landing Page

When you have added the fields and any applicable field options, you now need to add the field to the landing pages where you want to collect the data.

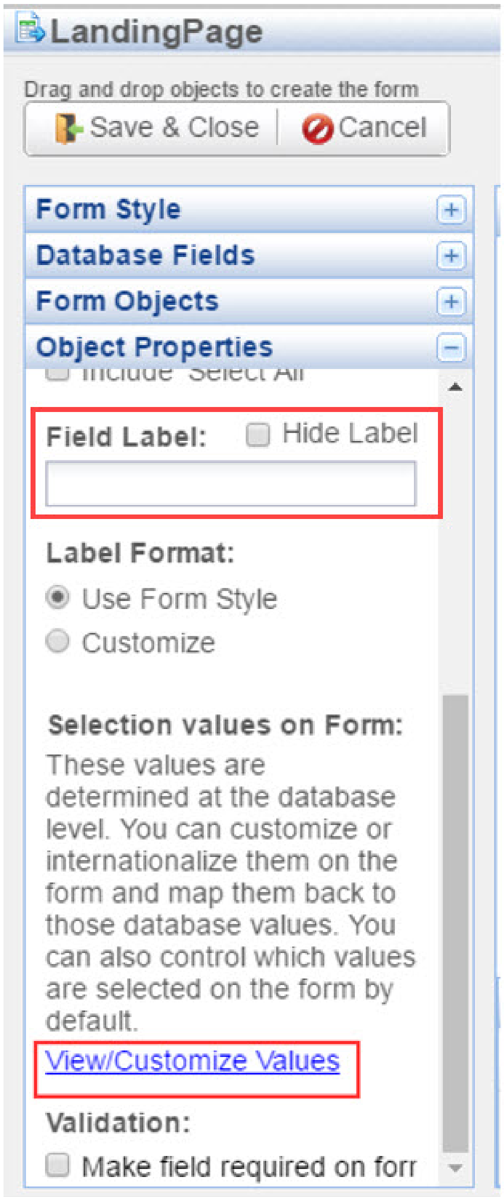
- In **IBM Marketing Cloud** browse **Content** > **Landing Page** .
  In the shared folder:



- Select the **Landing Page** name for the site where you want to add the custom field.
- Select the **Manage Site** > **Form** and then select **Data Collection** form.
- Locate the **New Field** in the list of database field and drop the new field into the appropriate location on the form.



- Select the **Field name** from the Landing Page area to customize the field label. You can also add option descriptions.



- **Save** the landing page and browse to **Preview it** > **Publish** to make the changes available to leads.

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