IBM Kenexa Lead Manager

IBM Kenexa Lead Manager Release Notes

June 26, 2017

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Contents

Introduction

This document presents changes, both visible and configurable, included in the June 26, 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.

Apply URL - Enhancement

This release introduces an enhancement to the **Job Apply URLs** created from BrassRing requisitions. Previously, when a Lead Managers Campaign was created from a BrassRing requisition, **Job Apply URLs** were automatically added to the Campaign. The URLs would include all Talent Gateways that were configured with the **Add as job apply URL option to Posting Partners** setting enabled. **Job Apply URLs** was sent regardless of whether the job was posted to that gateway and whether the gateway was active. This enhancement ensures that only **Job Apply URLs** posted to **active**, **posted** jobs are sent to Lead Manager.

Note: Lead Manager users can edit only the labels for **Job Apply URLs** that are added manually in Lead Manager. The list of **Job Apply URLs** is pulled dynamically whenever a campaign's **Job Apply URLs** is viewed or edited, not just at the time of **Send Communication**.

Campaigns - Auto File Leads

Lead Manager users can now configure saved searches to run overnight and **Auto File** found leads to designated **active** campaigns. **Auto File** only adds **new** leads to the designated campaigns. When Lead Manager users configure search criteria for **Auto File**, they can specify the designated active campaign, the lead status for leads added to the campaign, and how many days the search should run.

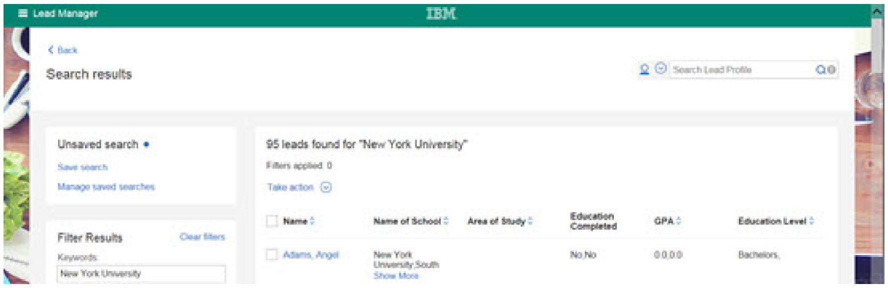
Note:

Search Results - Auto Fill New Leads to Campaigns

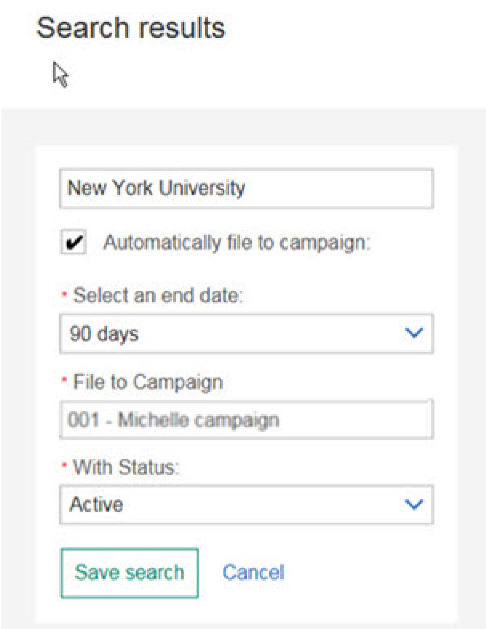
Using **Auto File** continually adds new leads to active campaigns and increases the pool of available leads. Lead Manager users can also **suspend** or **put on hold** campaigns to stop the **Auto File** feature.

This is one of many potential work flows using **Auto File**. A Lead Manager user finds that leads from one particular university always prove to become exceptional employees. Lead Manager user:

- Runs a search in Lead Manager for leads who attended New York University. Search results return 95 leads. User decides to create an **Auto File** search.

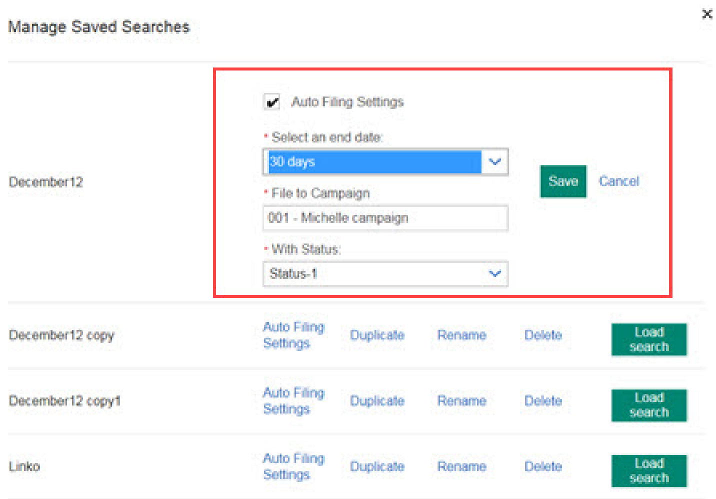


- Selects **Save search**. The saved search modal opens. Lead Manager user:
  - – Types in a new name for the **Auto File** search.
  - – Selects the check box for **Automatically file to campaign** to activate **Auto File**. The Save search modal expands and includes **Auto File** search options.



  - – Selects the duration of the search in days. The options are:
    - 30 days
    - 60 days
    - 90 days
    - 180 days
    - 365 days
  - – Types a name in the **Campaign** field. Auto complete suggests campaign names for **active** campaigns.
  - – Selects a lead status in the **With Status** field.
  - – Selects **Save search**.

The **Auto File** search runs for the allotted number of days and automatically files the leads into the designated campaign. The **Auto File** search is saved and Lead Manager users can access the search by selecting **Manage Saved Searches**.



- In the **Manage Saved Searches** modal users can select the following settings for searches that are configured with **Auto File Settings**.
  - **Auto File Settings** to edit saved search settings.
  - **Duplicate**
  - **Rename**
  - **Delete**
  - **Load Search**

Lead Manager Search - Is/Is Not Filters

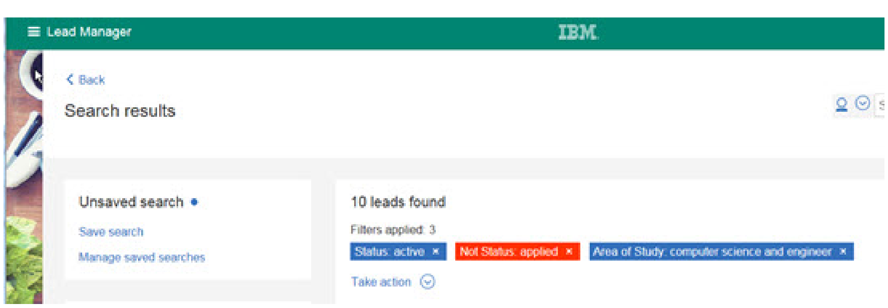
Lead Manager now supports a new search filter, **Is/Is Not** for searching leads and lead profiles. Lead Manager users can now include **(Is)** and exclude **(Is Not)** search filters simultaneously when they are searching leads and lead profiles within Lead Manager. Searches that use the **Is/Is Not** filters can be saved and duplicated.

Search Filters Is and Is Not

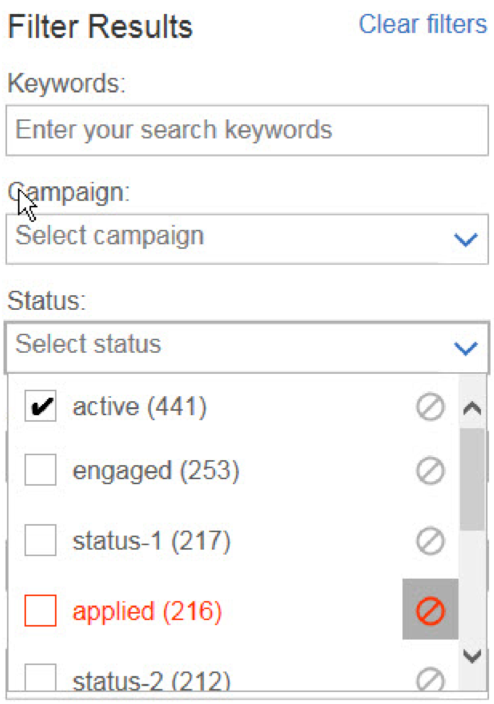
Lead Managers users can now combine an include **(Is)** and exclude **(Is Not)** filter when searching in Lead Manager. Combining filters help Lead Managers quickly locate leads. Each filter in the **Filter Results** has two options: a check box to mark the filter active **(Is)**and a selectable icon to mark the filter inactive **(Is Not)**. When the **(Is Not)** is selected, the icon turns red in **Filter Results** and on the Search Results page.

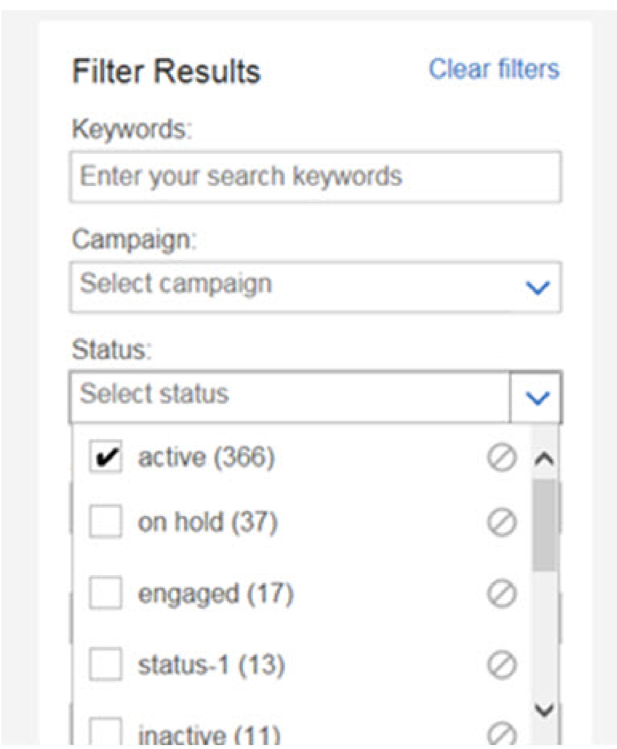
Note: The **(Is)** and **(Is Not)** cannot be used for the same filter.

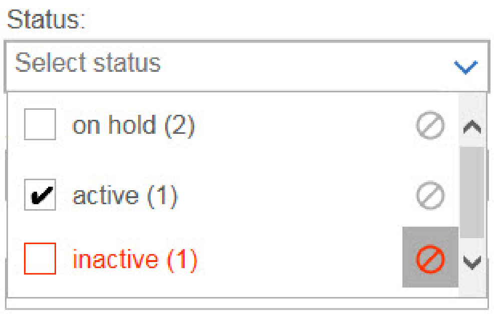
When a search criteria is marked **Is Not**, the filter search criteria is applied to the search and displays in red at the top of the search results page.



When a search criteria is marked **Is Not**, the filter is applied to a search criteria and is removed from the filter selections.





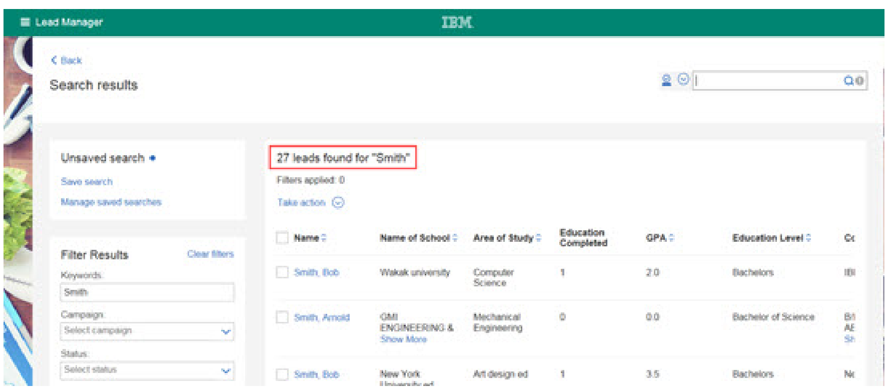


Using the Search Filters Is and Is Not

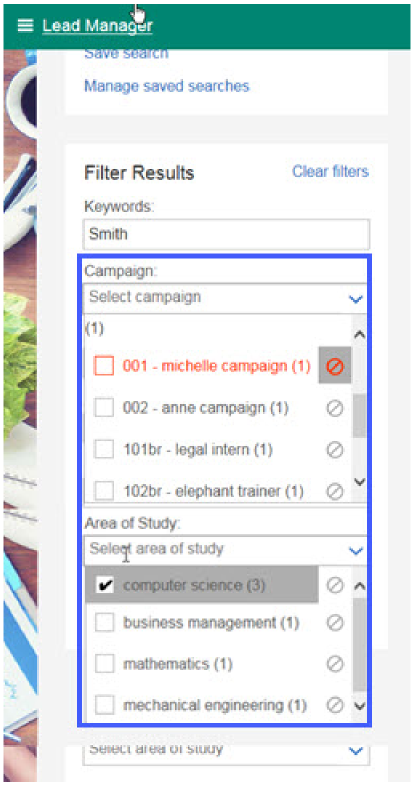
A Lead Manager user is assigned to an existing campaign. The user remembers seeing a lead whose name is **Smith** who majored in **computer science** and was an **active** lead. The Lead Manager user wants to find this lead quickly to see if the lead is a good fit. The user also wants to make sure that the lead is not already in the **existing campaign**.

Lead Manager user:

- Logs in to Lead Manager and enters **Smith** into the search field and selects the **Search** icon. On the Search results page, the search results return 27 leads.

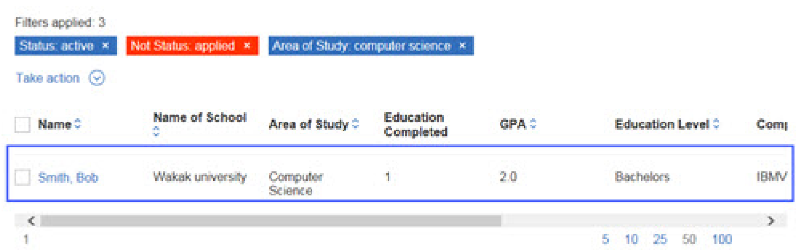


- Opens the **Status** filter and selects the check box for **Active** and the **Is Not** icon for the **Campaign**. Scrolls to the **Area of Study** filter and selects the check box for **Computer Science**.



The search criteria search filters display at the top of the search results section and the search runs. Active search filters that are designated **Is** display in **blue** and inactive search filters **Is Not** display in **red** on the Search Results page.

- The Search Results page displays the found lead. The Lead Manager user was able to quickly find the lead by using the new search filter options.

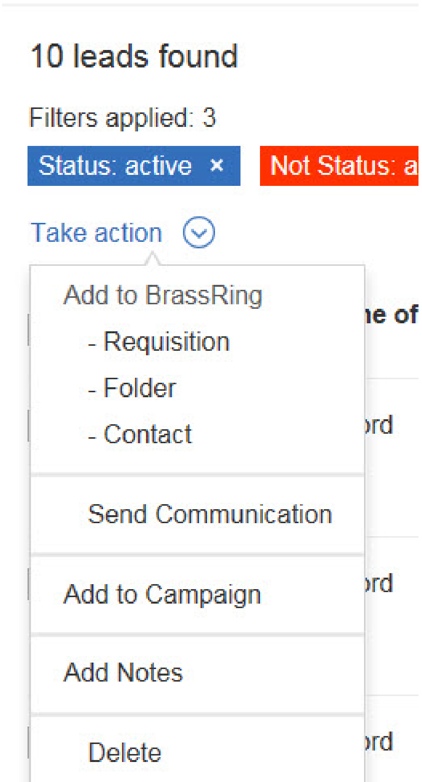


Take Actions - Enhancement

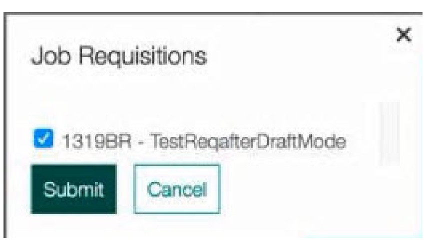
When Lead Manager users select the **Take Actions** menu and add leads to either requisitions or folders, the system now responds with either a success or not available message. The response message is available on the Lead Profile, Lead Grid, Search Results, and Lead Listing pages.

Take Action Menu

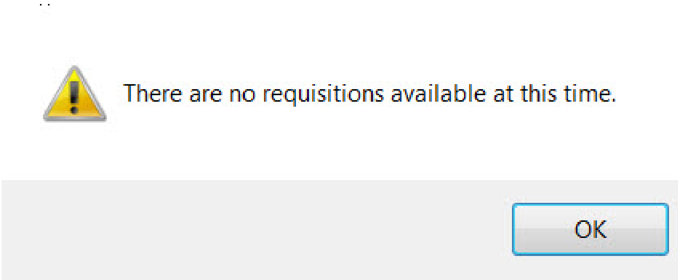
The **Take Actions** menu now gives Lead Manager users a more interactive experience. If a Lead Manager user selects a lead and then adds that lead to either **Requisition** or **Folder**, the system now responds to the user's requests.

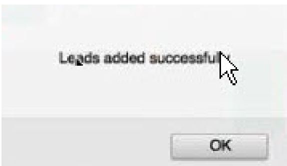


The following example shows a requisition workflow, but the workflow is the same for folders. For example, if a lead is added to a requisition that is available, the system displays a modal. Lead Manager user can then select **Submit**. If the submission is successful, the system again



responds with another modal that informs the Lead Manager user the submission was successful. And, if the requisition is not available, the modal displays this message:





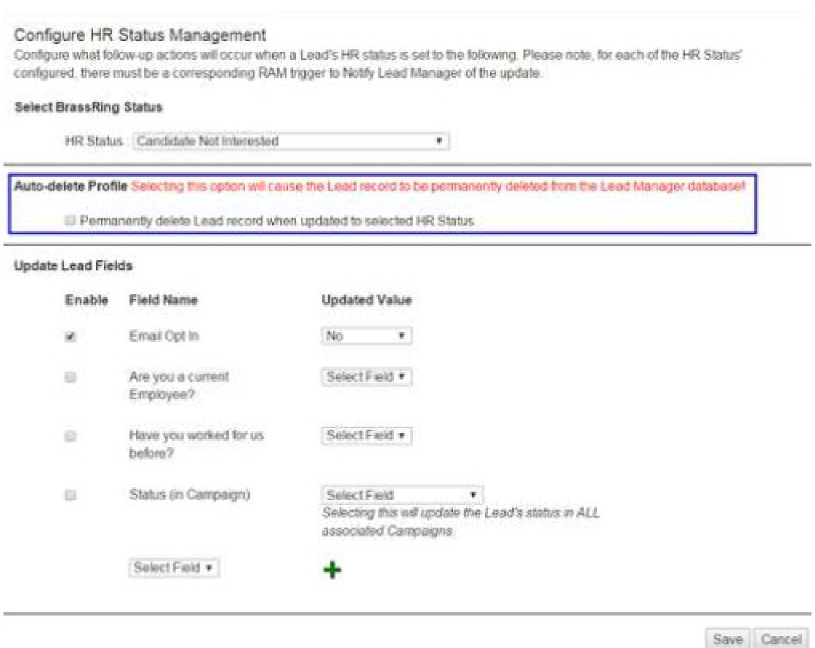
Configurable Changes

The current release of IBM Kenexa Lead Manager includes the following configurable changes.

Auto Delete Leads

Lead Manager Administrators can now permanently delete leads from **Lead Manager** and from **Watson Campaign Automation (formerly known as IBM Marketing Cloud)**. This release introduces a new Lead Manager configuration option **Permanently delete lead record when updated to selected HR Status**. When this configuration is paired with a RAM trigger, when the BrassRing candidate reaches the configured status, their record is permanently deleted from **Lead Manager**, **WCA**, and the LeadID is removed from the **BrassRing** record.

Auto Deleting Lead Manager Leads



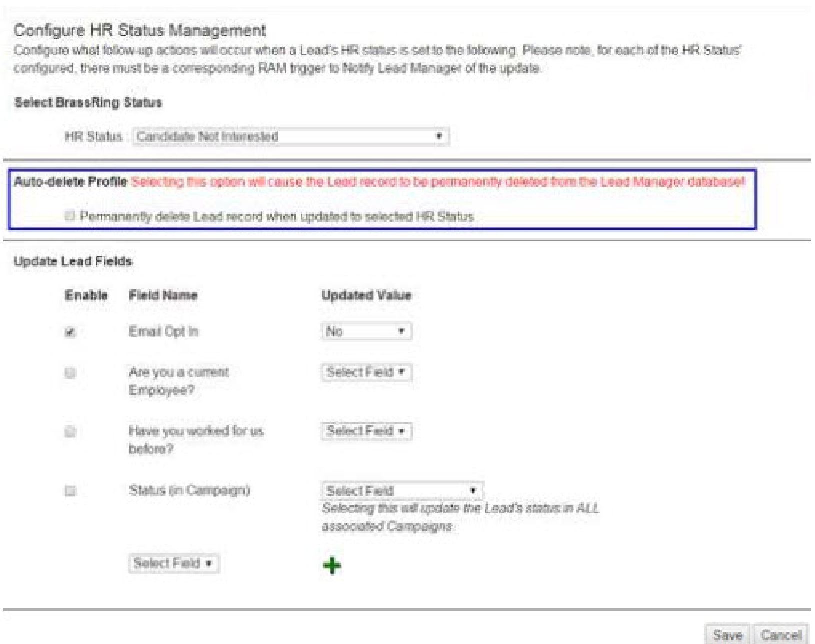
How do clients get this feature?

Lead Manager Administrators can configure the **Permanently delete lead record when updated to selected HR Status**and a RAM trigger to permanently delete leads from **Lead Manager** and from **IBM Marketing Cloud**.

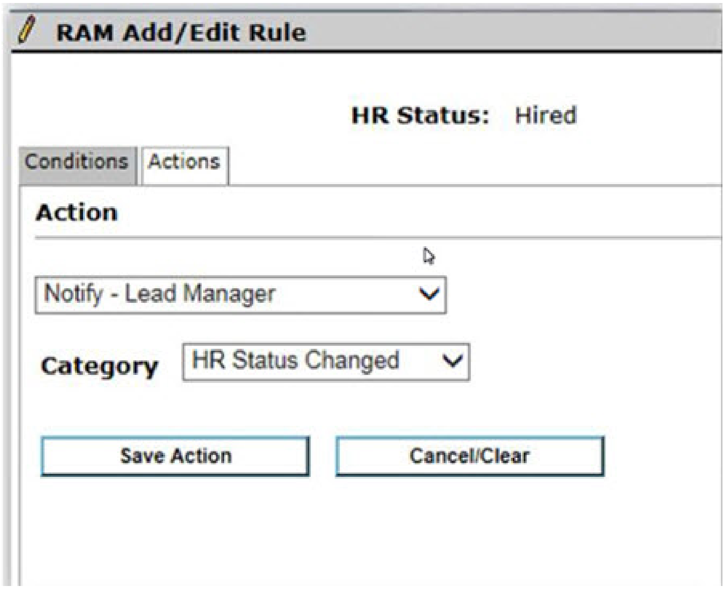
Permanently delete lead record when updated to selected HR Status

In BrassRing Workbench, Lead Manager Administrator:

- Browses to **Tools** > **Lead Manager** > **HR Status Management** > **Administer Configuration**. The **Configure HR Status Management** modal opens.
- Selects the check box for **Permanently delete lead record when updated to selected HR Status**.



- Selects **Save**.
- Browses to **Tools** > **Automation Manager** > **Admin**.
- Adds a RAM trigger with the triggering mechanism of **HR Status** and an Action to **Notify - Lead Manager** when the **HR Status Changed**. When the trigger reaches the configured **HR Status** the trigger sends the notification to lead manager.
-



- When Lead Manager receives the notification, the lead is deleted from **Lead Manager** and from **WCA**.

New User Privilege - Leads - Delete Campaign

Lead Manager Administrators can now restrict the ability to delete Campaign history from the Lead Profile. The delete action is now restricted to users with the user privilege **Leads - Delete Campaigns**. Previously, all Lead Manager users could delete campaign history from a lead profile.

How do clients get this feature?

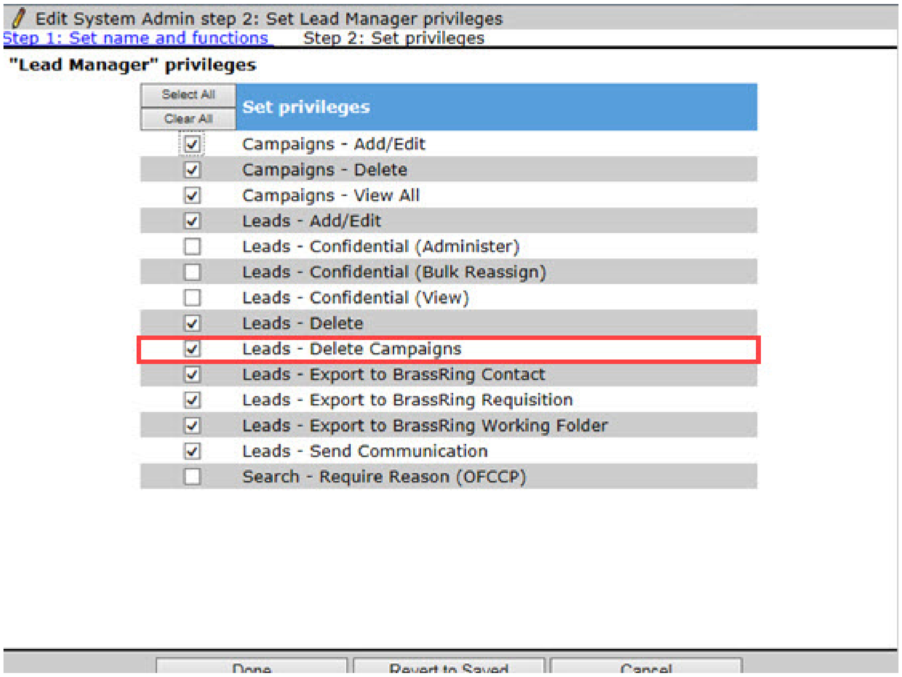
Lead Manager Administrators can now configure the user privilege **Leads - Delete Campaigns** to restrict the ability for Lead Manager users to delete a Leads campaign history.

Note: All existing clients' User Types have been updated to automatically include this privilege so that existing user's experience is not disrupted. Clients will need to update User Types that should NOT have the ability to delete a Lead's Campaign History.

Delete Campaign

In BrassRing Workbench, Lead Manager Administrator:

- Browses to **Tools** > **Users** > **User Types** > **Edit Type Privileges** > > **Lead Manager**. The **Lead Manager** privileges modal opens.
- Selects the check box for **Leads - Delete Campaigns**.



- Selects **Done**.
- Selects **Save**.

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