IBM Kenexa Lead Manager

IBM Kenexa Lead Manager Release Notes

March 2017

Note

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This edition applies to the March, 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 March, 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.

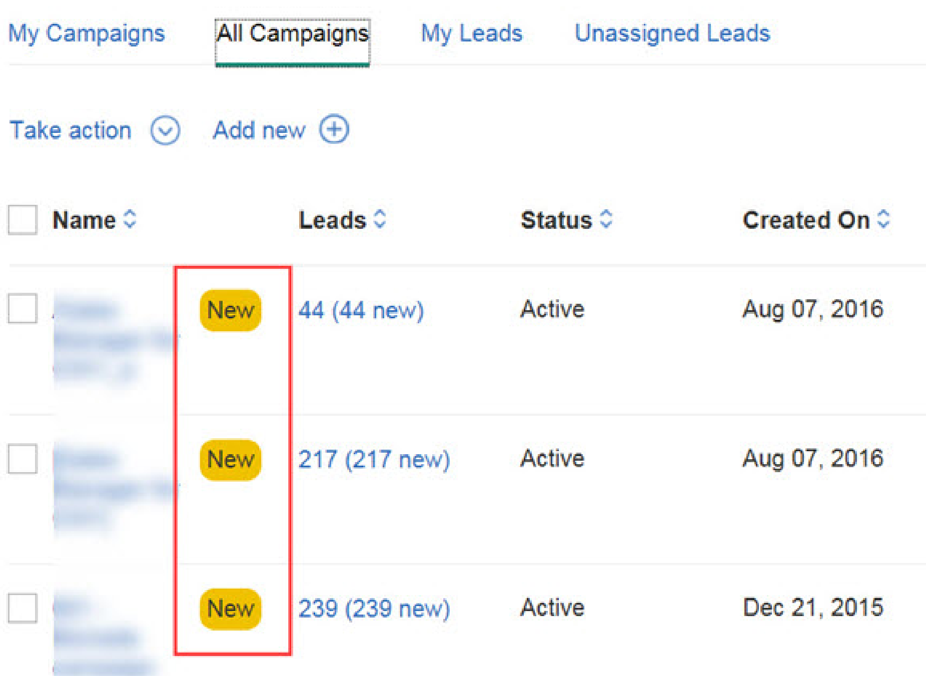
Visible Changes

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 Campaign Indicator

Lead Manager now supports a **New** Campaign indicator for campaigns a logged-in user has not previously viewed. The **New** campaign indicator displays on the Campaign Grid pages in the **My Campaigns** and **All Campaigns** tabs and on the Campaign Search Results page. If a logged-in user has the privilege to view a campaign and they have not logged into the campaign previously, the **New** campaign indicator displays.

New Campaign Indicator
: When the logged-in user views their Campaigns in the **My Campaigns** and **All Campaigns** grid, the **New** Campaign indicator displays next to the Campaigns the logged-in user has not yet viewed.



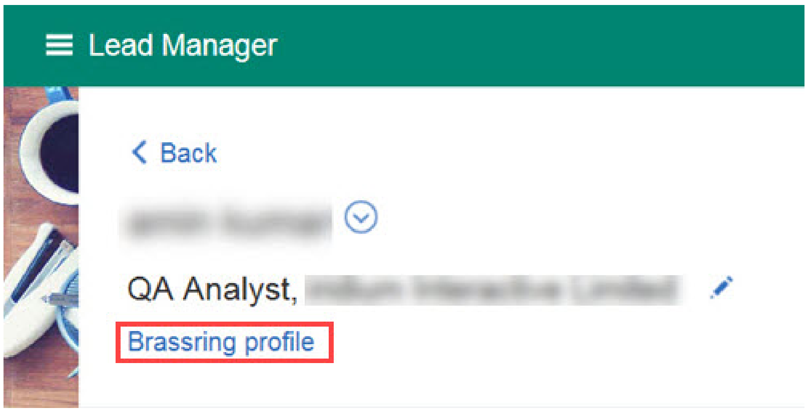
When the Lead Manager user selects a Campaign designated **New** and views the campaign, the **New** Campaign indicator is removed from that Campaign in the **My Campaigns**, **All Campaigns**, and on the Campaign Search Results page.

Viewing BrassRing Candidate HR Status in Lead Manager

Lead Manager users can now view a lead's BrassRing **HR Status** on the Lead Profile page in Lead Manager.

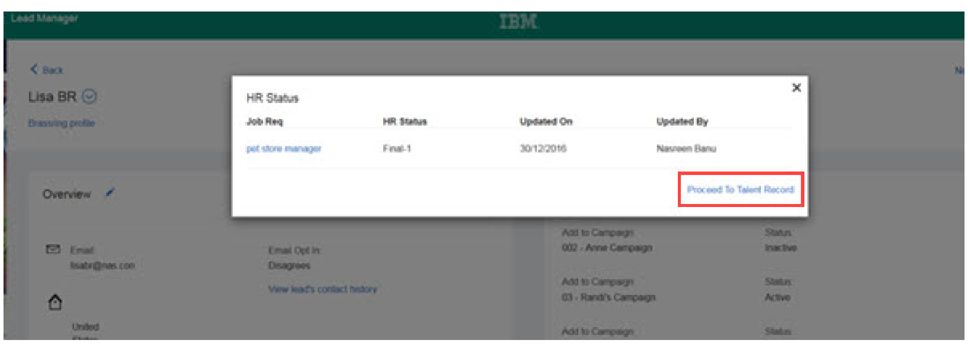
Lead Profile Page - BrassRing HR Status

Lead Manager users can now view a lead's BrassRing **HR Status** on the Lead Profile page. On the Lead Profile page, user selects the **BrassRing profile** link.
The **HR Status** modal opens and displays the HR Status modal that displays the HR Statuses in

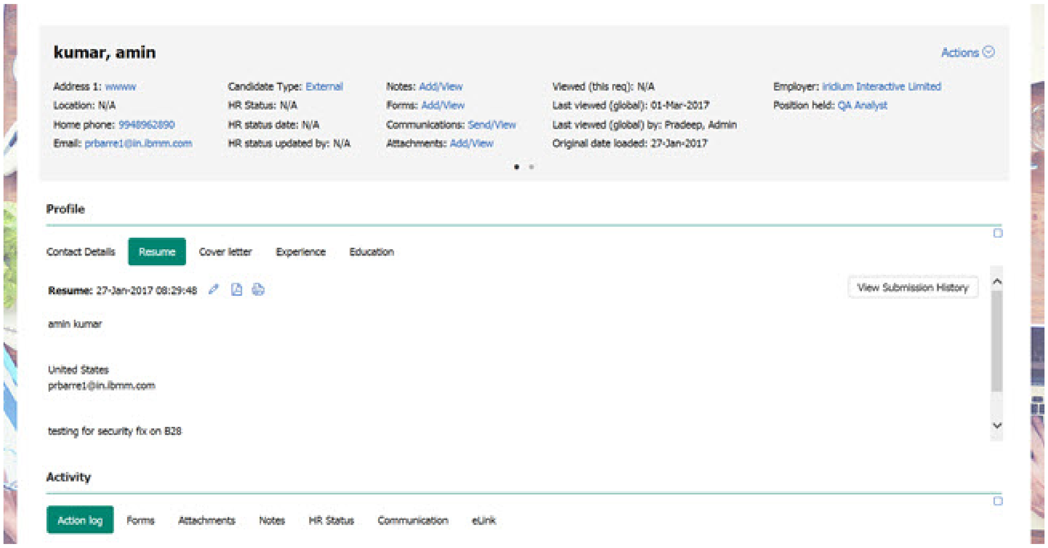


descending date order. For each HR status, the following BrassRing fields display:

- **Requisition title**
- **Current HR Status**
- **Updated on (date)**
- **Updated By**



Lead Manager user selects **Proceed to Talent Record** to be redirected to the full Talent Record.



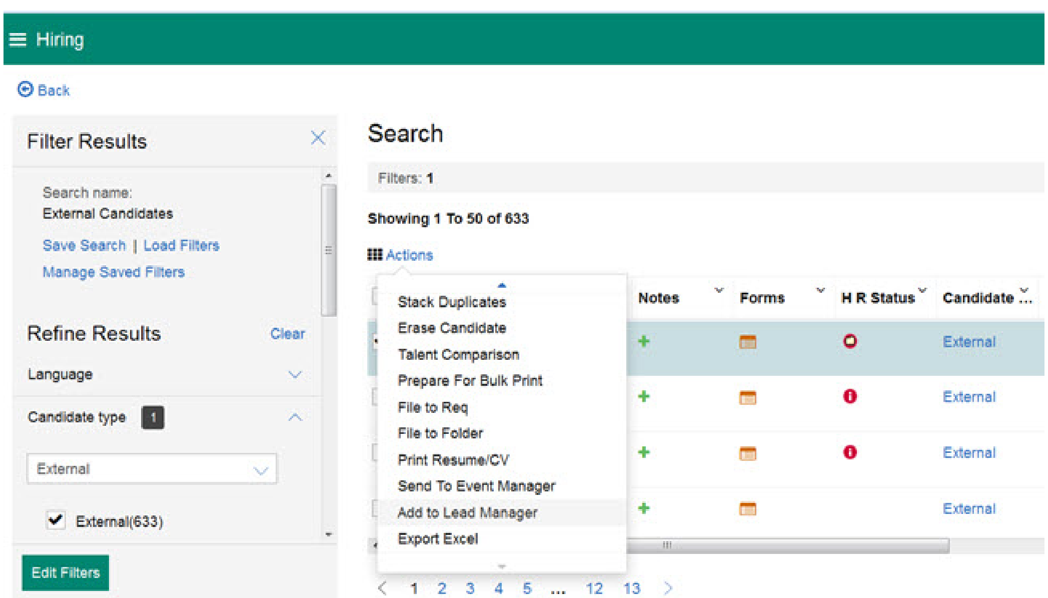
Add Leads to Lead Manager Enhancement

The **Add Leads to Lead Manager** workflow has been enhanced. Lead Manager users can now assign multiple BrassRing® leads to campaigns and statuses in one step from the new UI Candidate Search Results page, the **Action** menu in the lead's new UI Talent Record page, and from the ribbon in the BrassRing Classic Talent Record. This now matches the flow from the new UI grid and classic panels.

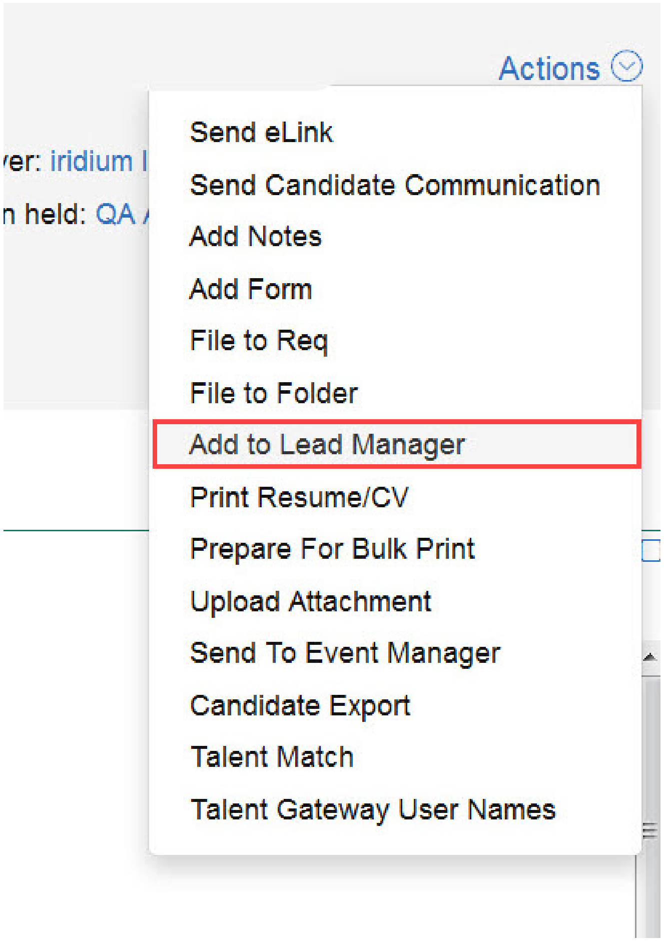
Add Leads to Lead Manager Enhancement

Lead Manager user:

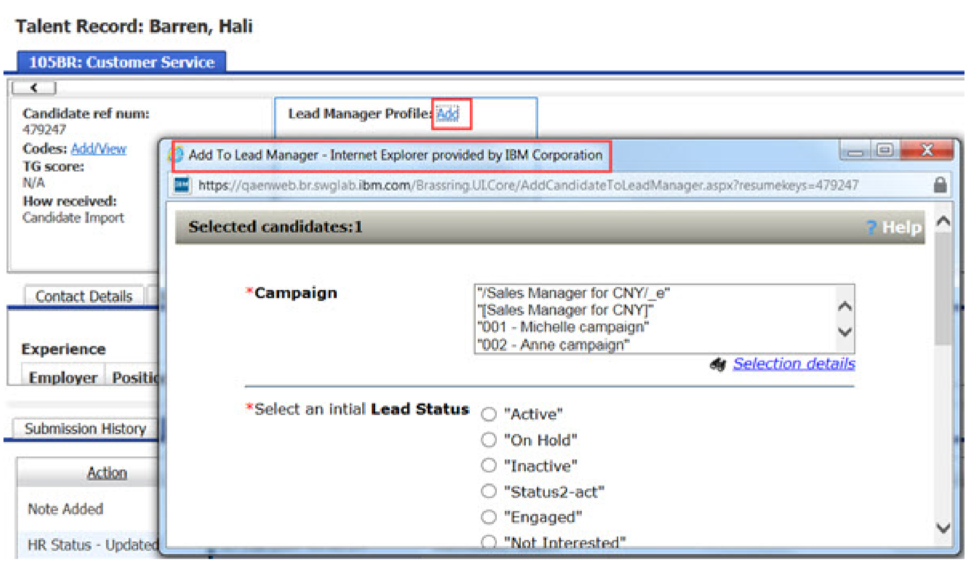
- Selects the check box next to a lead's name on the new UI Candidate Search Results page.
- Selects the **Actions** menu and then selects **Add to Lead Manager**, **OR**



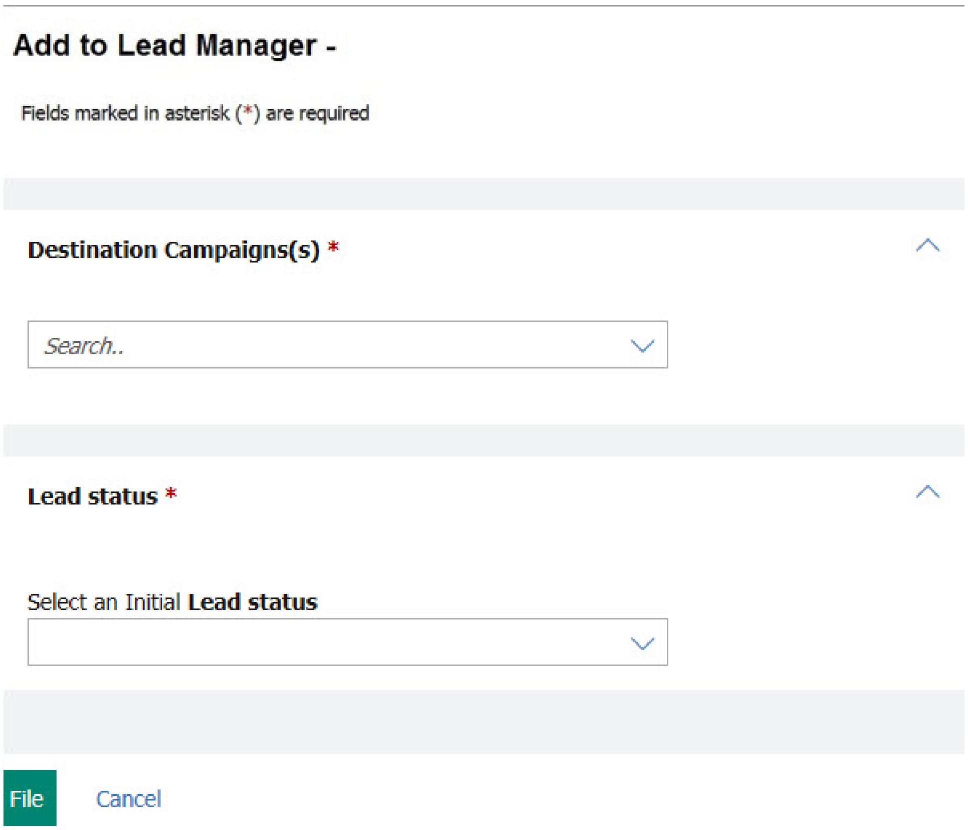
- Browses to the lead's new UI Talent Record.
- Selects the **Actions** menu and then selects **Add to Lead Manager**, **OR**



- Browses to the lead's Talent Record in BrassRing (classic).
- Selects **Add to Lead Manager** from the Talent Record ribbon.

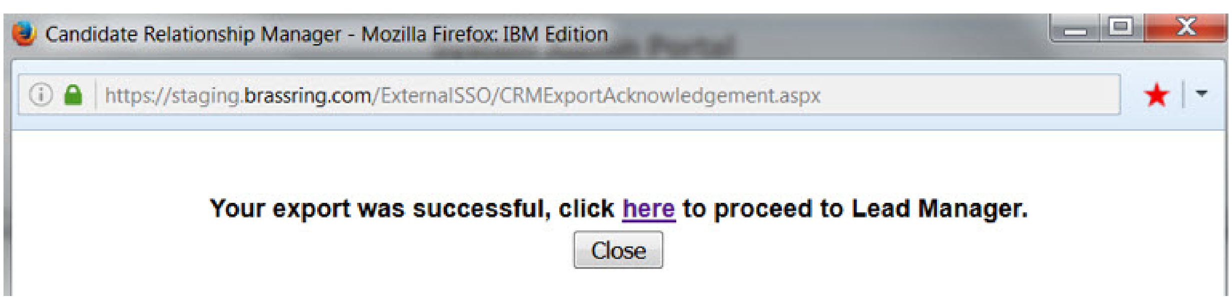


- Selecting **Add to Lead Manager** in any of these locations opens the **Add to Lead Manager** prompt.



- Selects the destination **Campaign** and the **Lead Status**. If multiple leads are selected, all leads are assigned the same initial **Lead Status**.

  Note: You must enter a Campaign name to activate the **Destination Campaign** drop-down Campaign list.
- Selects **File**. If a single candidate was exported, the Lead Manager user is redirected to their Lead Manager profile in **Edit** mode. If multiple candidates were exported, the Confirmation page opens.



About Add Leads to Lead Manager Workflow

Before you add leads to Lead Manager, keep in mind the following considerations.

- You can select one or more leads for export. When you select multiple leads, those leads are exported to the same selected campaign.
- Users can assign candidates only to Campaigns they have privileges to access.
- If only one lead is selected, after export the Lead Manager user lands on the **Lead edit profile** page.

- If a lead exists in a campaign, they are associated with the additionally selected campaigns. The original campaign association is not over written by the new campaign association, and the new campaign is added to their record.
- If a lead exists in a campaign, their existing status is not be overwritten by the selected (export) status.

Lead Manager Import Enhancement

The **Lead Import** template that is used for **Excel Upload** now supports a **Notes** column in the Excel spread sheet. After import, the **Note** displays on the Lead's profile with a creation date equal to the upload date and the user's name who uploaded the file.

Note: When you upload and use the **Notes** column, the upload always **adds** a new note to the Lead record. This import does not update and existing notes.

Note: When you upload and use the **Notes** column, the upload always **adds** a new note to the Lead Record. This import does not update any existing **Notes**.

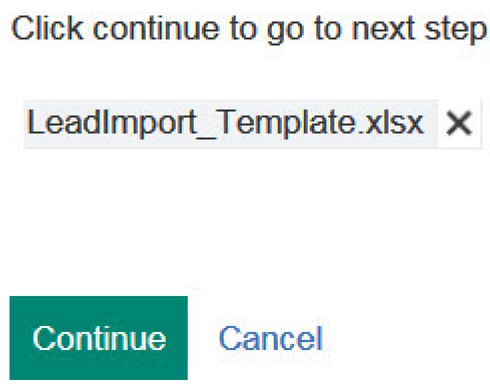
Lead Import Template Enhancement

During **Bulk Parsing** or **Excel Upload** Lead Manager user:

- Selects **Download Template** to download the template.
- Opens the downloaded template. Lead Manager selects the **Instruction** tab to read the instruction for including the **Notes** column and then adds the **Notes** column on the **Lead Details** tab.

	A	B	C	D
124	**Company5ZipCode**		Numeric	Update cell format to text to ensure leading zero's are not truncated
125	**Company5StartDate**		Text	Enter date in following format mm/dd/yyyy
126	**Company5EndDate**		Text	Enter date in following format mm/dd/yyyy
127	**Company5JobDuties**		Text	Enter job responsibilities
128	**Notes**		Text	Enter notes for Lead. These will be date stamped with the date of upload and associated with the user initiating the upload
129				

- Selects **Save** to save the changes to the template.
- Selects **Upload**. The Import Leads page refreshes and displays the uploaded template.



- Selects **Continue**. The upload process begins and the system checks the file for any data validation issues. The Import Leads page displays the uploaded file summary.
- Receives an email when the file import completes.
- Browses to any records associated with the lead to view the added **Notes** section. The content in the **Notes** section includes the user who uploaded the content and the date of upload.

Data Insight Tool - Custom Field Support

DIT now supports custom Lead Manager fields.

DIT - Custom Field Support
    Lead Manager users can now add custom fields for DIT reports.

Configurable Changes

The current release of IBM Kenexa Lead Manager does not include any configurable features. Configurable features must be configured or turned on to be visible and available to users.

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