Kenexa Recruiter® BrassRing and Talent Gateway Solutions

Product Update Guide

Release 12.2
Revision 0

Kenexa
Recruiter® BrassRing 12.2

Release Date:
US: November 19, 2009
EU: November 25, 2009

Document Date:
November 13, 2009

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System

Browser/OS Support

Please see the "*Kenexa Recruiter BrassRing Supported Browsers*" PDF file, included in the PDF package with this document.

Language Support

As of Release 12.2, Talent Gateways are translated into Croatian and Serbian.
Please see the "*Kenexa Recruiter BrassRing Supported Languages*" PDF file, included in the PDF package with this document.

Recruiter Experience

Portal Page Enhancements

As part of the comprehensive user interface update, Release 12.2 introduces the second phase of the project.

Configuration Changes to Support Enhancements

- New client setting: New/Viewed tied to Req
- Changes to User Type Privileges
- Changes to User Type Panel Mapping Page
- Changes to Layout Templates
- New Panel: All Open Reqs panel
- Changes to Candidate Results Panel Type
- Candidate Results Panel Standard Configuration
- Changes to Administering Panel Configuration
- Changes to Fields Available for Configuration
- Changes to Administer Panel Configuration
- Changes to Fields Available for Configuration
- Changes to Panel Mapping
- Changes to Inactivation/Deletion of Fields

User Experience Enhancements

The description of these enhancements starts on page 18 in the "*User Experience*" section.

- "New" Designation is Req-Specific
- Changes to Export to Excel
- New workflows:
  - Req Management
  - Candidate Selection
  - Talent Pool Management
  - User Admin/Preference
- Editing Columns
- Quick Links
- Column Sorting for Req Panels
- Candidate Actions Menu Business Rules
- Export to Excel

All other functionality (including only exporting the current page) remains the same.

Date Available

This feature is available in R12.2 Build 0.

US:	November 19, 2009

EU: November 25, 2009

Cost

No additional cost.

How Do I Get this Feature?

Please contact your Kenexa consultant for help with the initial enablement of this feature. In addition, your Certified Workbench User must achieve Tier IV certification. After basic enablement, configuration is done in Workbench.

Benefits

You can perform most daily tasks within panels. There is less need to navigate to “classic” (interior) pages/grids.

Visible Changes

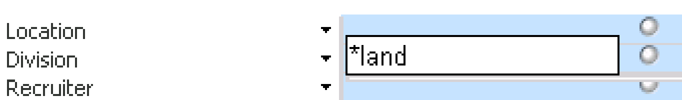
There are visible changes in this release. Please see the “*Kenexa Recruiter® BrassRing KRB Release 12.2 Visible Changes*” document for a detailed description.

Limitations and Known Issues

Wildcard searches don’t work as expected when the “User name differentiator” feature is turned on.

Users can perform wildcard searches within filters using asterisks (*).

However, when user name differentiation is turned ON for a client, if a user filtering by a name value removes the terminating asterisk to focus on names ending with the search string, no matches will be found because the names actually end with a phone number or user ID number.



Configuration

Change to Meaning of "New" Candidate Designation

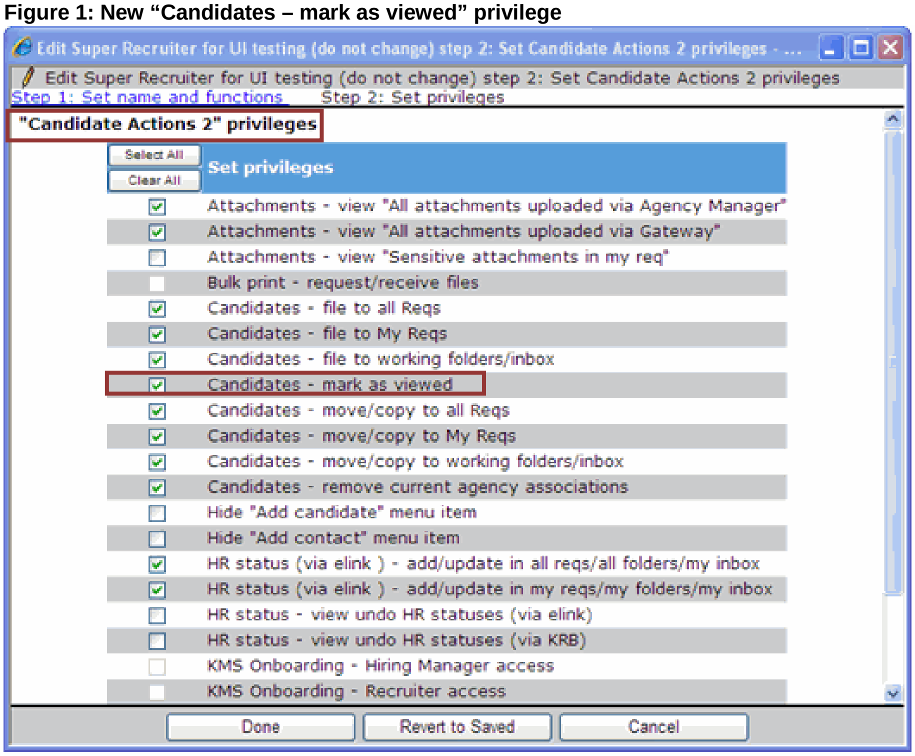
This is feature is controlled by the new client setting and affects only the new UI. Tracking on "viewed per folder" started on August 27, 2009: *All* candidates viewed before that date are "new."

The user type privilege **Candidates – Mark as Viewed** is linked to this setting.

Changes to User Type Privileges

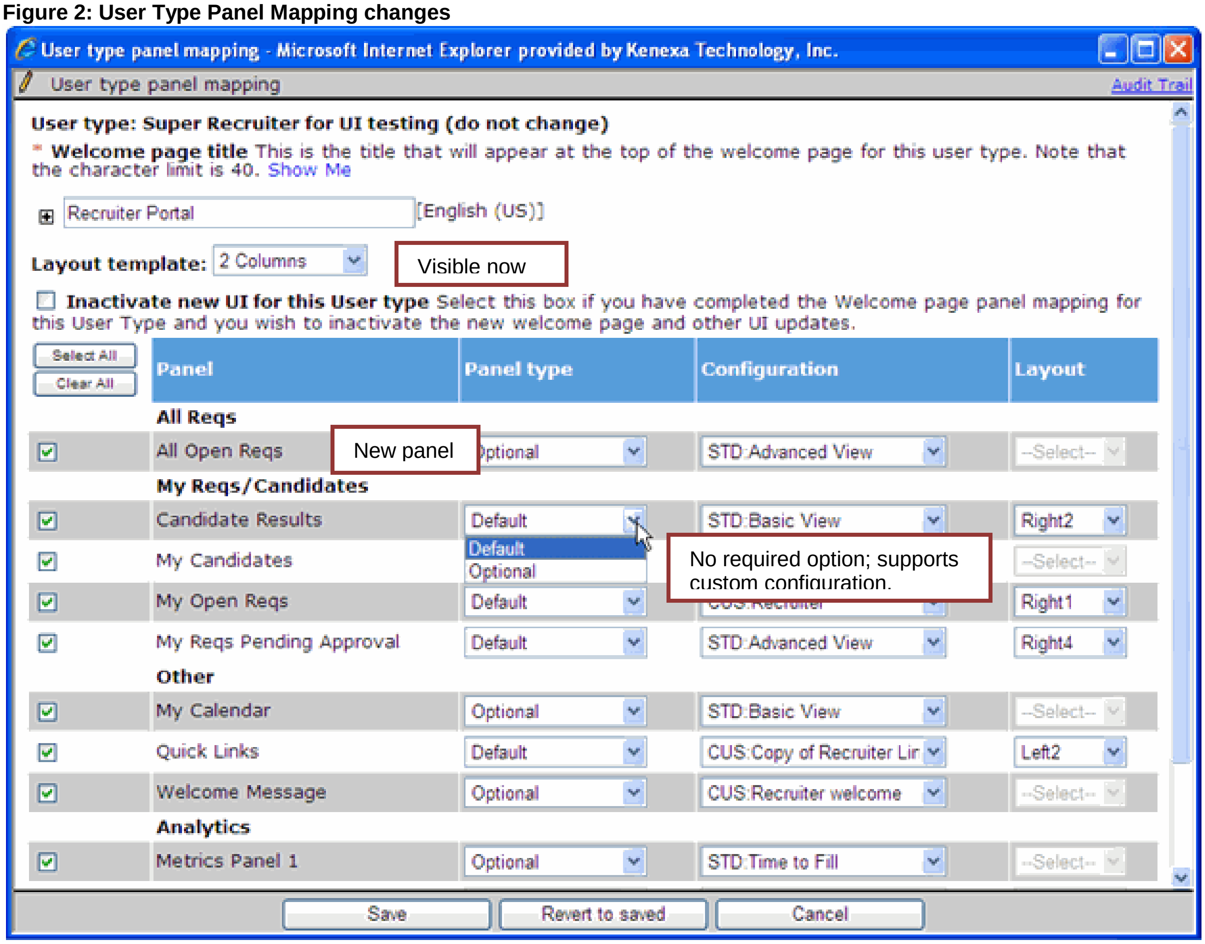
There is a new user type privilege, **Candidates – mark as viewed**:

Figure 1: New "Candidates – mark as viewed" privilege



Changes to the User Type Panel Mapping Page

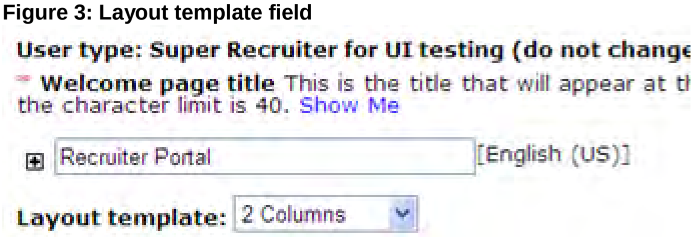
Figure 2: User Type Panel Mapping changes



Changes to Layout Templates

Layout templates are visible now.

Figure 3: Layout template field

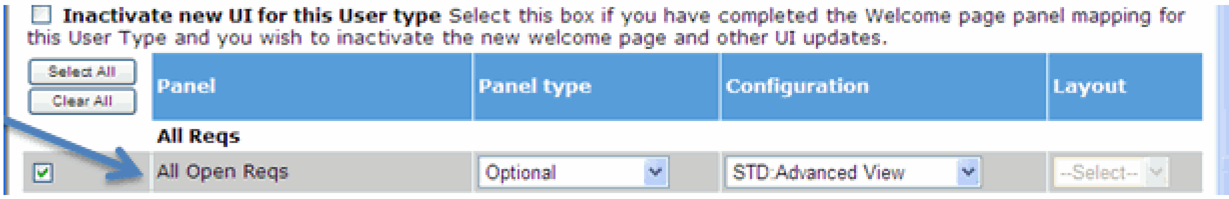


This enhancement:

- Allows better formatting for 1 column layouts (hourly portals).
- Defaults to 2 columns.
- If 1 column is selected, you must select all right or left side layout options.

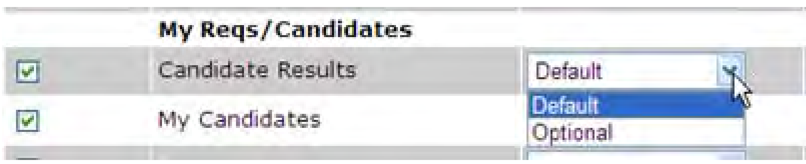
New Panel: All Open Reqs Panel

Figure 4



- Selectable if the user type has the privilege Reqs > All Reqs – View open
- Same Basic and Advanced View options as My Reqs
- All fields are the same as My Reqs

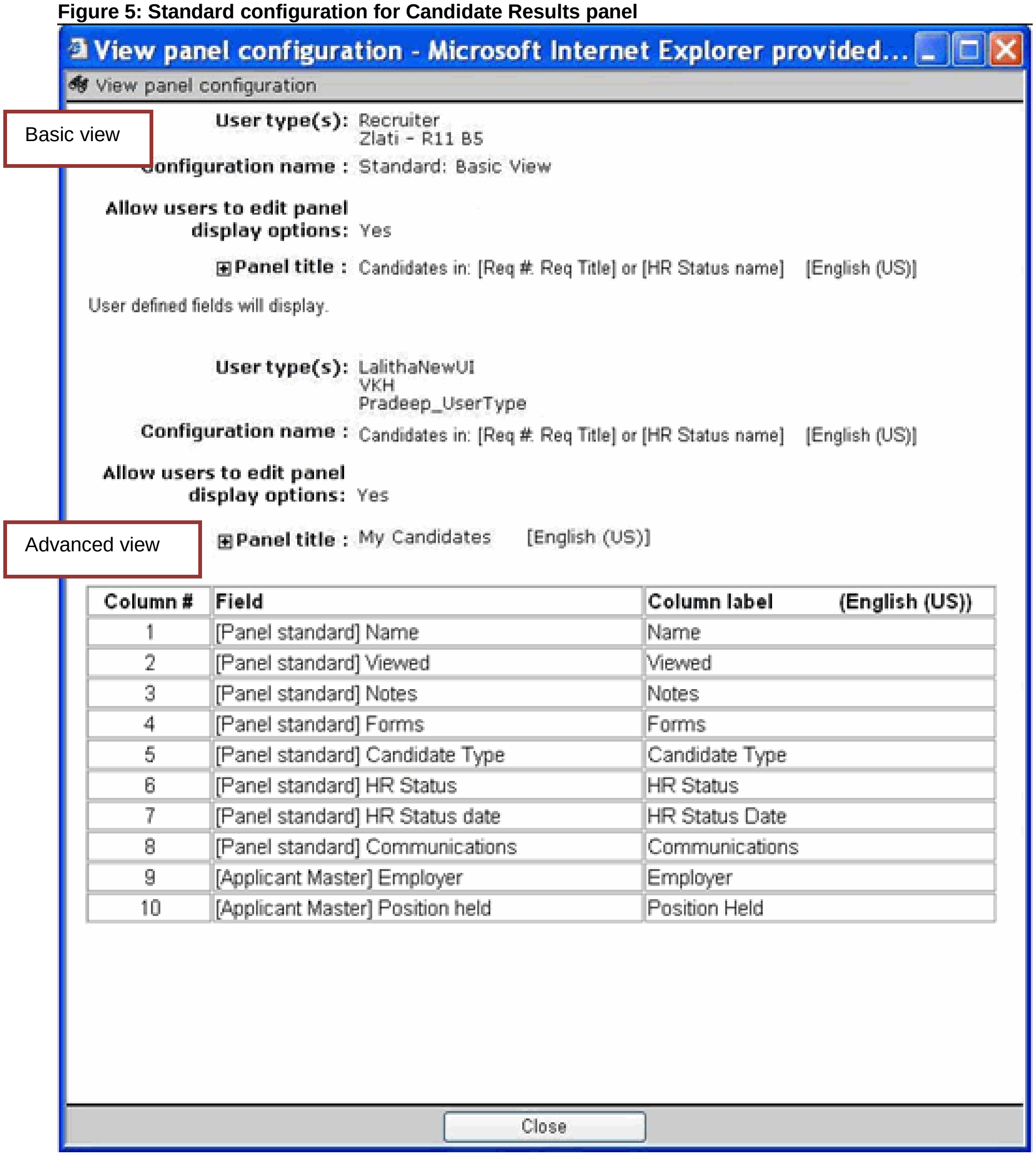
Changes to the Candidate Results Panel Type



- The option "Required" for this panel was removed since the end user can close the panel at any time and it will relaunch when needed
- If any active mapping have the option selected, it will be changed to "Default"
- Default will no longer show as minimized upon login but will still launch into mapped location when called

View Standard Configuration: Candidate Results Panel

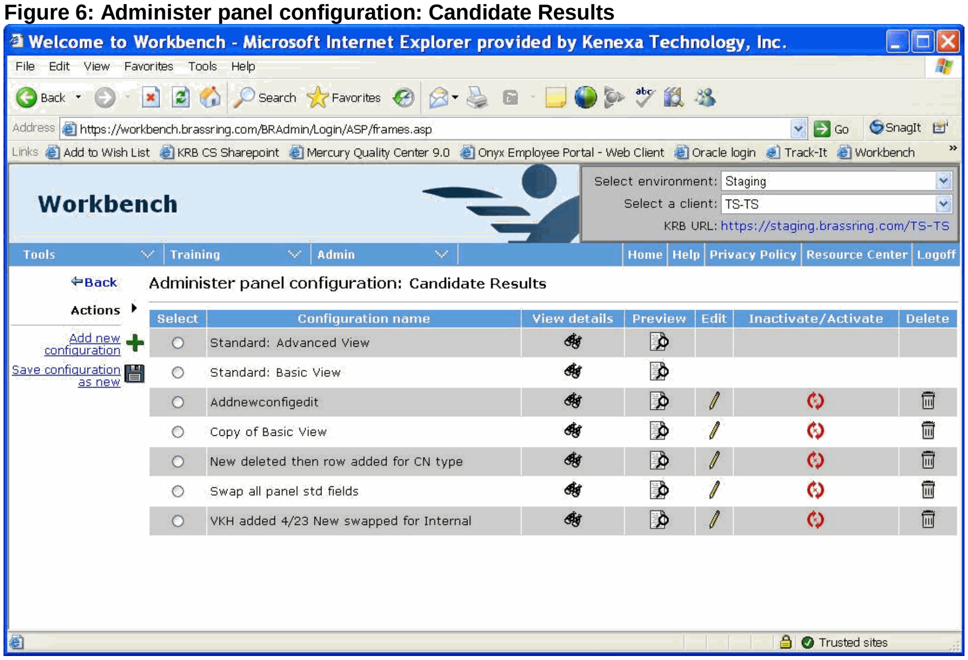
Figure 5: Standard configuration for Candidate Results panel



Column #	Field	Column label (English (US))
1	[Panel standard] Name	Name
2	[Panel standard] Viewed	Viewed
3	[Panel standard] Notes	Notes
4	[Panel standard] Forms	Forms
5	[Panel standard] Candidate Type	Candidate Type
6	[Panel standard] HR Status	HR Status
7	[Panel standard] HR Status date	HR Status Date
8	[Panel standard] Communications	Communications
9	[Applicant Master] Employer	Employer
10	[Applicant Master] Position held	Position Held

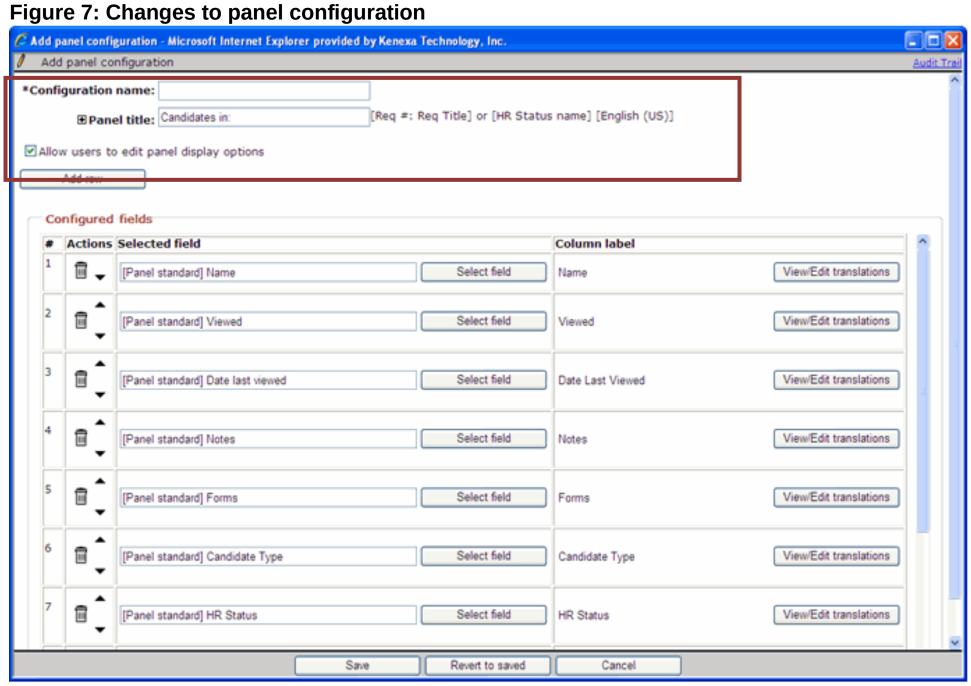
Changes to Administer Panel Configuration

Figure 6: Administer panel configuration: Candidate Results



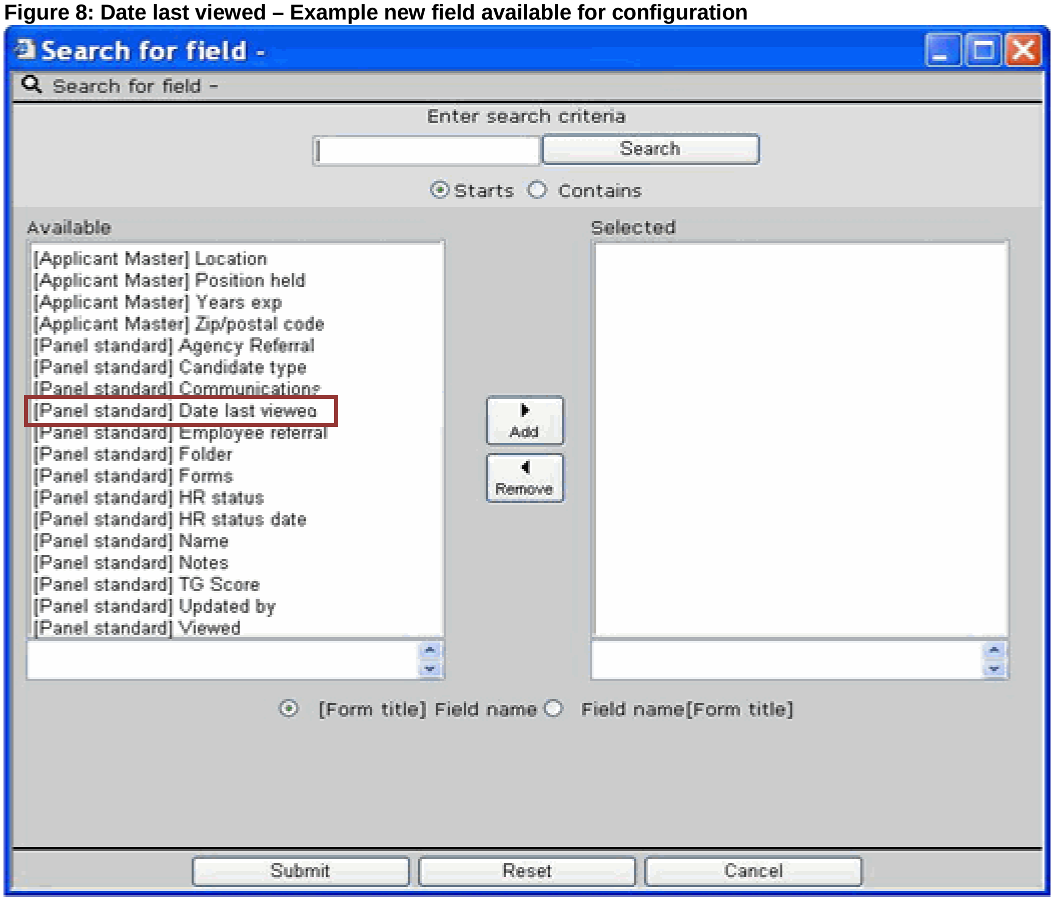
Your organization can customize the text that appears before Req # and Title at the top of the panel.
All panels with grids (and QL) now have this control to give the end user access to “Edit Columns” widget.

Figure 7: Changes to panel configuration



Changes to Fields Available for Configuration

Figure 8: Date last viewed – Example new field available for configuration



Available fields:

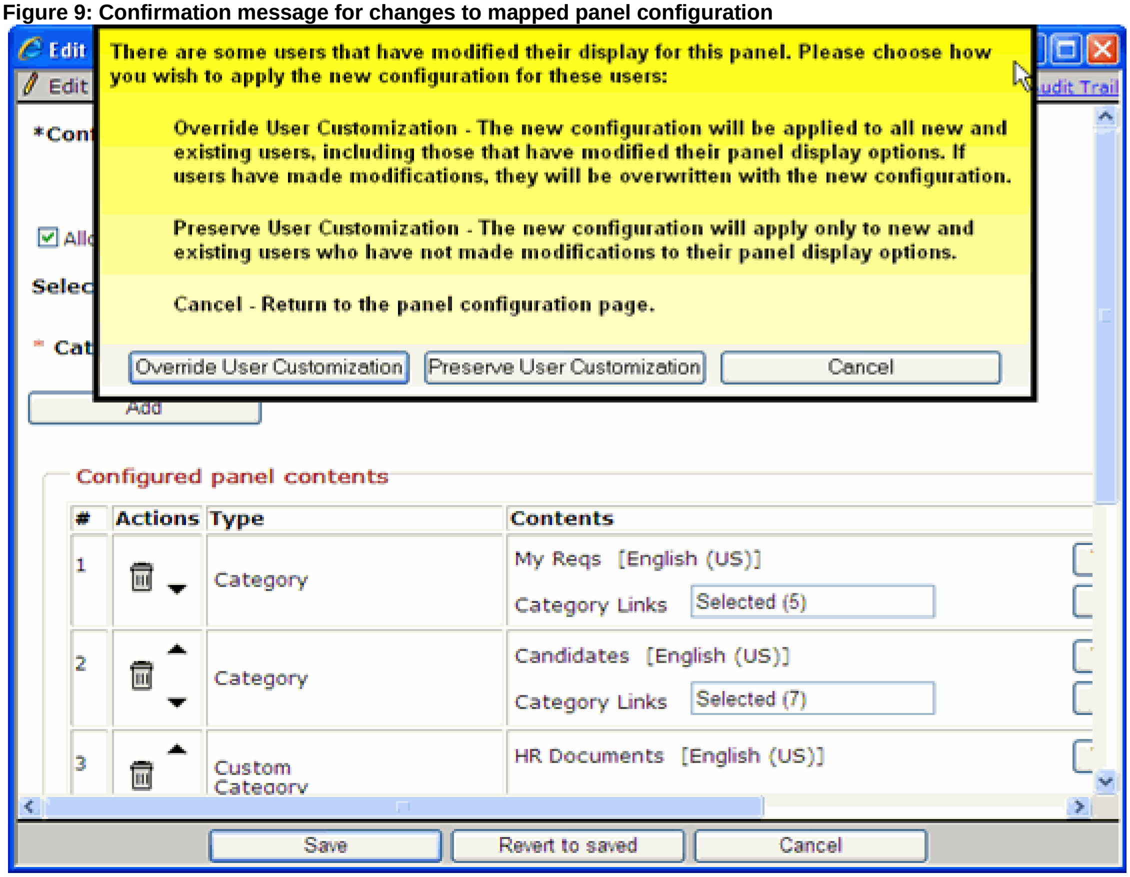
- Applicant Master fields
- Standard grid fields (Notes, Forms, Viewed, etc.)
- Candidate form fields that meet the following criteria:
- Designated as "outputable"
- Are of the following field types: date, email address, numeric, single select, radio button, text, and SSN which are not encrypted

Apply Changes Confirmation on Panel Configuration and User Type Panel Mapping Changes

With this release, KRB users can now change their configuration AND those changes are persistence to the next login. The Workbench Administrator can also make changes to these same configurations. Because of this, when changes are made in Workbench the user must decide how to apply those changes to existing users who have made adjustments to their portal page configuration.

When a Workbench user makes changes to an actively mapped panel configuration, validation will happen and the following confirmation may display:

Figure 9: Confirmation message for changes to mapped panel configuration



Panel Configuration Validation Logic

The following logic is then applied to determine if the confirmation will display:

1. Is the configuration mapped to at least one user type and is the mapping active?
   - If Yes - Go on to next validation
   - If no – Do not display confirmation pop up

2. Are the edits to any of the following areas: Add Row, Edit selected field, or Delete selected field, select/deselect of “Allow user to edit display options” or “Display only Reqs which the user themselves is the approver” ?
   - If Yes – Go on to the next validation
   - If No – Do not display the confirmation pop up

3. Has at least one user made modifications to the display options in KRB?
   - If Yes – Display the confirmation pop up
   - If No – Do not display the confirmation pop up

Override Options

Override User Customization – The configuration that has been saved will be sent to KRB and that configuration will be used for all existing users and new users going forward.

Preserve User Customization – The configuration that has been saved will be sent to KRB and will be applied only to users that have not made modifications to the panel column display.

Filter exception – Even if Override is selected for panel configuration changes, the user’s filter, if there is one, remains in place.

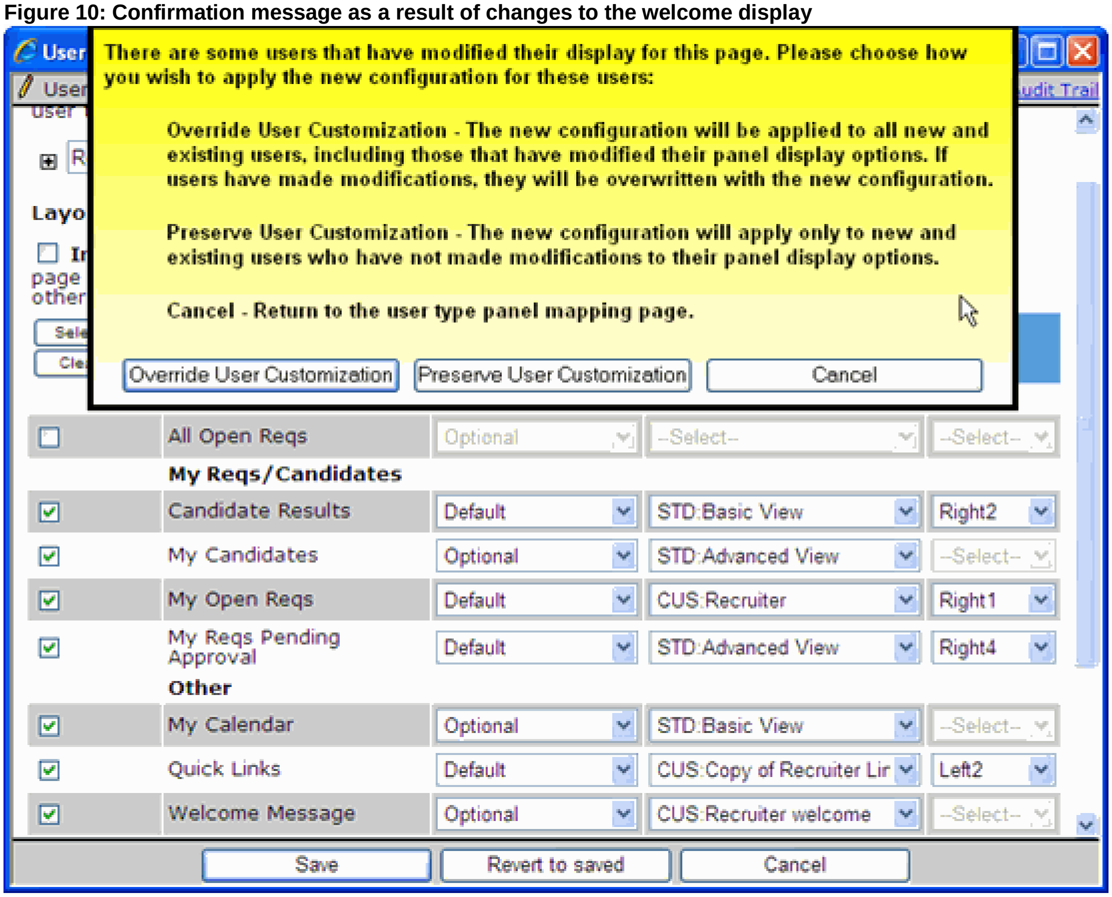
Changes to Panel Mapping

When changes are made to an existing User Type panel mapping, the system applies the following logic to determine whether to display the confirmation message or not:

Has at least one user modified the welcome display in KRB?

- If Yes – Display the confirmation pop up
- If No – Do not display the confirmation pop up

Figure 10: Confirmation message as a result of changes to the welcome display



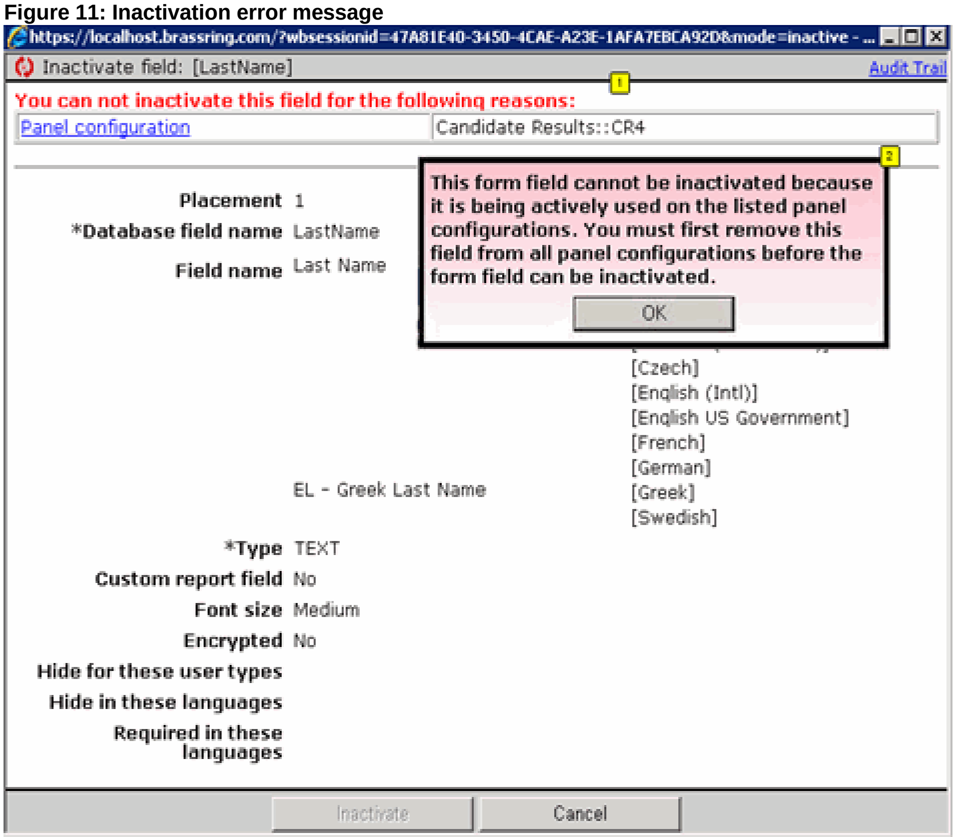
Overrides affect panel layout only. Individual panel configuration will not be changed unless a different configuration was selected as part of the change.

Changes to Inactivation/Deletion of Fields

Workbench will now not allow inactivation and delete actions in the following areas if the field is tied to an active panel configuration:

- Candidate form fields
- Custom req fields
- HR Status

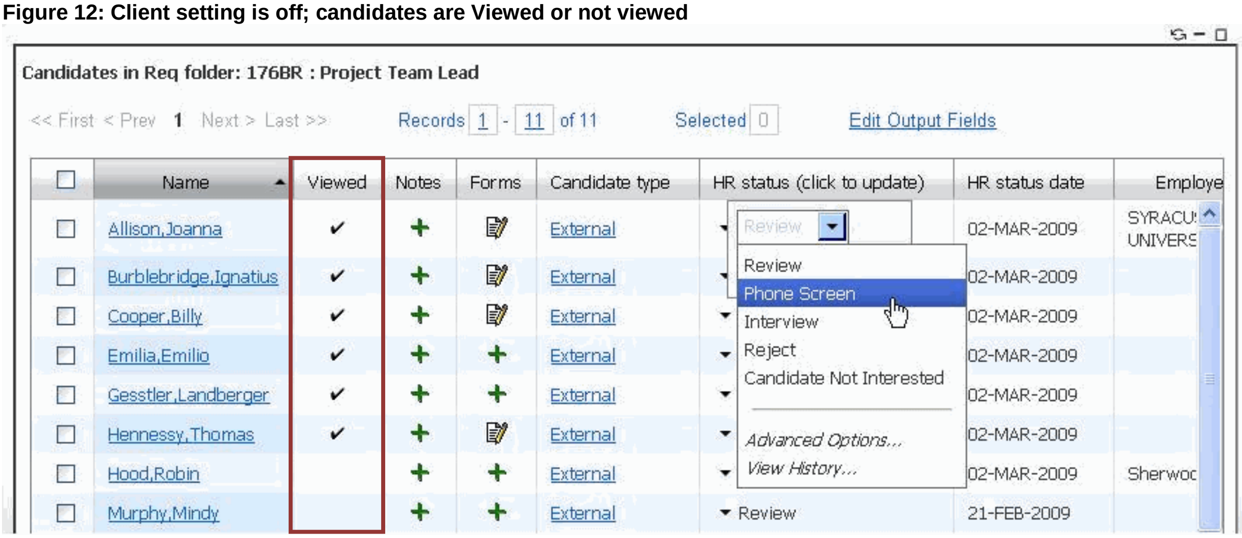
Figure 11: Inactivation error message



User Experience

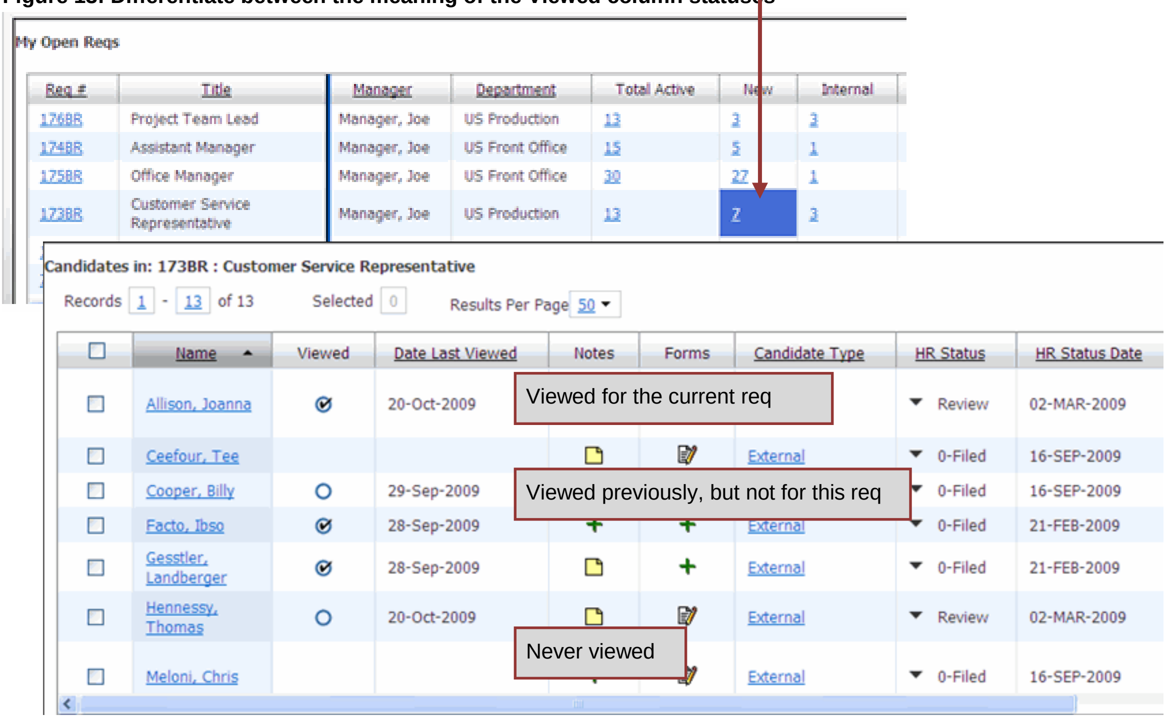
“New” Designation is Req-Specific

Figure 12: Client setting is off; candidates are Viewed or not viewed



If the **New/Viewed tied to Req** client setting is turned on, the “New” count is specific to a requisition.

Figure 13: Differentiate between the meaning of the Viewed column statuses



Users with the **Candidates – mark as viewed** privilege (**Tools > Users > User types > Edit type permissions > Candidate Actions 2**) can mark the candidate as having been viewed for this requisition if they have opened the candidate's Talent record previously, either in **Search Results** or for another requisition.

Business Rules

When the setting is turned on for the client, the not viewed candidates per req will appear starting with the date 12.1 Build 1 went into production (8/27/09) going forward. Candidates viewed prior to the change will be considered "New" for all reqs in which they are filed.

If a candidate is viewed from within a Req/working folder/inbox on the classic pages, this will also be tracked in the new UI, i.e. that candidate will no longer be considered "New" for that req on the My Open Reqs panel or in the Candidate results.

If a candidate is viewed from within the search results on the classic page, this will be considered not specific to a req/folder, and therefore will be "New" for any Reqs in which they are filed.

Date Last Viewed is not tied to the new setting. The **Date Last Viewed** is always the date the candidate was last viewed for any req/folder/inbox/search results. For candidates last viewed prior to August 27, 2009 – this date is the date that the TR was first opened.

The following are scenarios that could occur due to the change in how "New" is tracked using the new setting "tie new to req":

Scenario 1: Candidate has NOT been viewed by the user AT ALL prior to or after August 27, 2009.

- No viewed check mark in classic or new UI. Counted as "New" for all folders in which they are filed

Scenario 2: Candidate HAS BEEN viewed in conjunction with Req folder 123BR PRIOR to August 27, 2009 but HAS NOT been viewed in Req folder 126 BR which he/she was filed to after August 27, 2009.

- All classic pages: ✔ New UI for both folders – no icon; New
- Date last viewed would exist (as the date the candidate was first viewed)

Scenario 3: Candidate HAS BEEN viewed in conjunction with folders prior to August 27, 2009 AND has been viewed in conjunction with 123BR AFTER August 27, 2009.

- All classic pages: ✔ New UI for 123BR: 

Changes to Export to Excel

The following items are changes from classic export to excel functionality and are effective for new UI only.

- If specific candidates are selected, only those will be exported
- Notes and Forms columns will contain the words "Yes" if 1 or more notes or forms exists or the word "No" if none exist
- The "Viewed" column will contain "No" if the user has not viewed the candidate and "Yes"

All other functionality (including exporting only the current page) remains the same.

Req Management

Column Sorting for Req Panels

Certain columns in the My Open Reqs and the My Reqs Pending Approval panels will be sortable on click, indicated by the underlined title. The following rules will apply to which columns can be sorted:

- **Custom Req fields:** All field types EXCEPT: **Number** and **Date**
- **Standard Req fields:** Only the following: **Title**, **Manager**, **Recruiter**, **Department**, **Location/Division**, **Add Type**, **Req Type**, **College**, and **Job Code**
- **Panel Standard Fields:** Only the following: **Date opened**, **Date created**, **Next approver**

All Open Req **does not currently support sorting for any columns. Filtering Requisitions**
A new menu at the top right of the My Open Reqs and My Reqs Pending Approval panels will allow users to filter the results by eight standard fields.

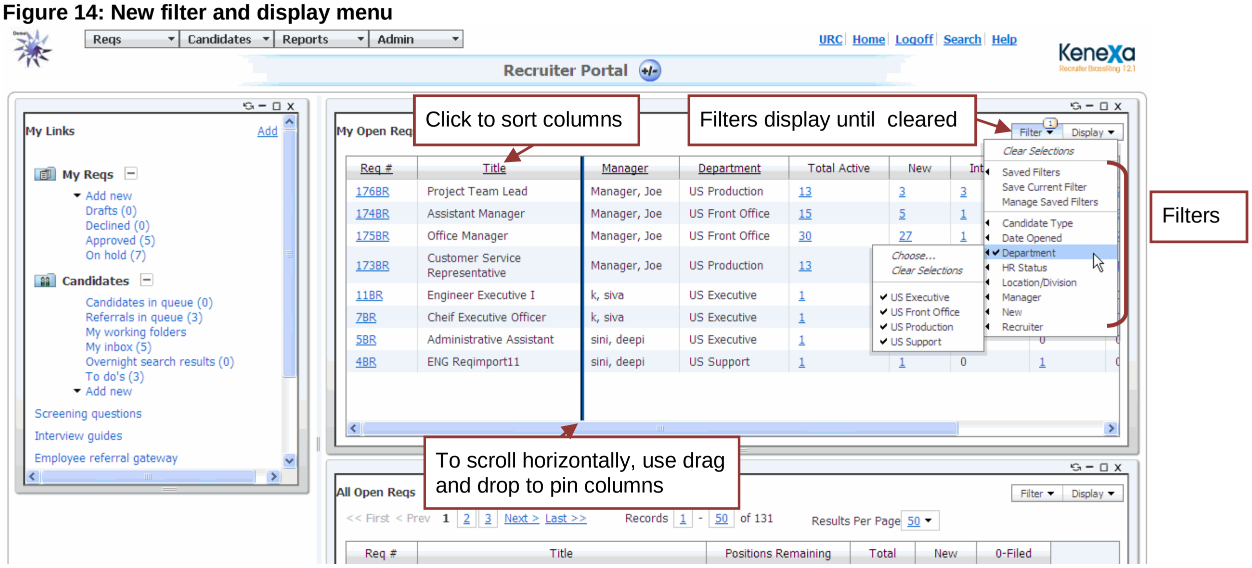
- Filter by: Candidate Type, Date Opened, Department, Location/Division, Manager, Recruiter, New, HR Status
- Candidate Results filter by HR Status and Candidate Type
- Filters remain in place (for future logins), with visual indication of the number of fields being filtered by, until the user clears the filter.
- Users can save any number of filters and manage their saved filters.

Pinning Columns for Horizontal Scrolling

The left-most column of the My Open Reqs, All Open Reqs and My Reqs Pending Approval panels will be pinned in place automatically so that it remains in view on horizontal scroll. Both the selection row and next column will be pinned for the Candidate Results panel. The pinned columns are delineated by a dark blue vertical line.

The user can drag the blue line to include any column to adjust which columns remain pinned. Any changes to pinned columns will remain to the next login.

Figure 14: New filter and display menu

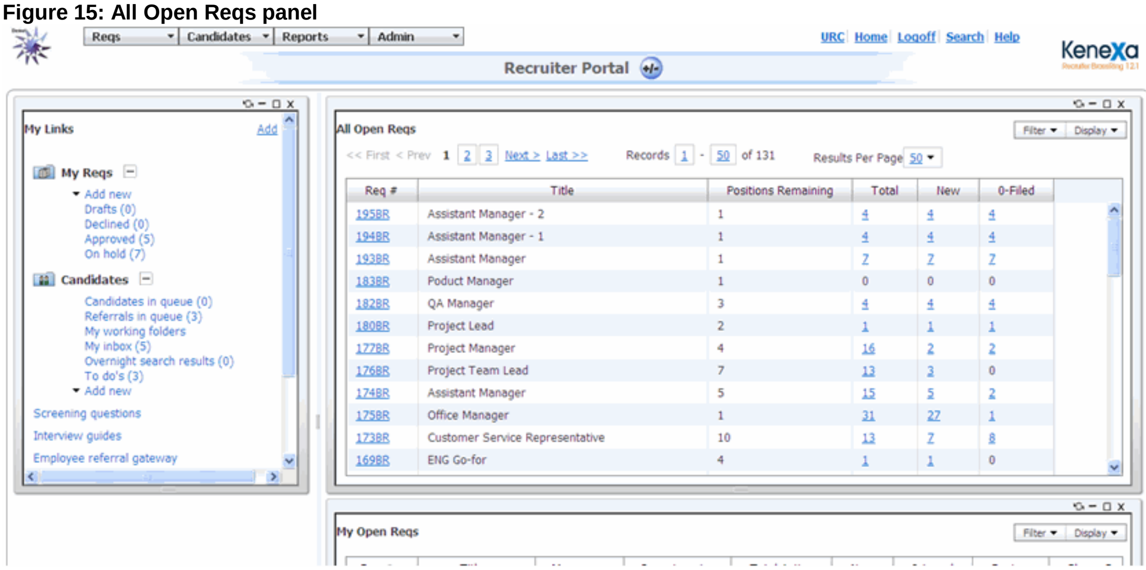


New Panel: All Open Reqs

The All Open Reqs panel is new in R12.2. It:

- Supports the 8 standard filters
- Displays the most recently created 1,000 reqs

Figure 15: All Open Reqs panel

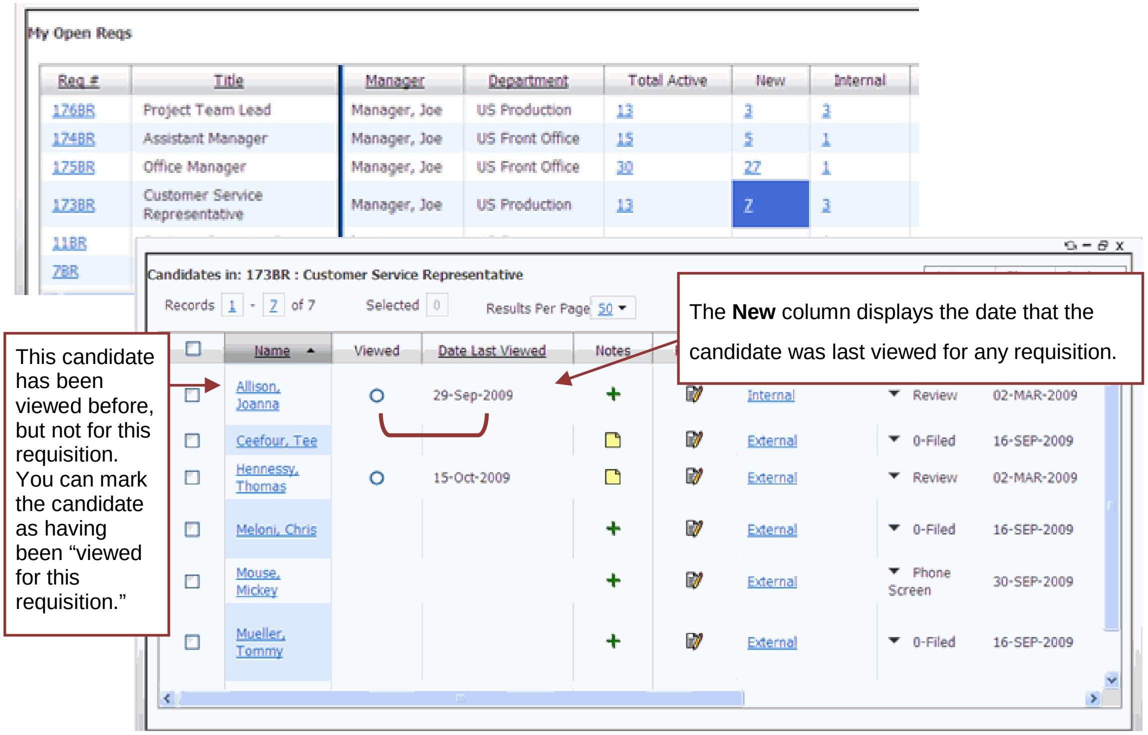


Candidate Selection

If the **New/Viewed tied to Req** setting is turned on (**Admin > Manage Clients > Edit Client Settings**), the "New" count is specific to a requisition. Users with the **Candidates – mark as viewed** privilege (**Tools > Users > User types > Edit type permissions > Candidate Actions**

2) can mark the candidate as having been viewed for this requisition if they have opened the candidate's Talent record previously, either in **Search Results** or for another req.

Figure 16: Differentiate between candidates viewed ever (for any req) and candidates viewed for this req



Candidate Results Panel – Panel Menu

A new menu bar with three items will display in the top right of this panel. The Actions menu:

- Displays the most-used actions are available for selection.
- Allows user to select multiple candidates for actions and updates.
- Users can add the same Note or Form to multiple candidates at once.

Once an action is selected, the resulting pop-up screen has not been changed.

Candidate Actions Menu Business Rules

Adding forms to multiple candidates:

- If form is of type "per req", all candidates must be in the same req folder (e.g. from My Candidates)
- If form type is of single per candidate or per req and a candidate already has an instance, message will display at confirmation that was not added for that specific candidate

Send communication and Create document:

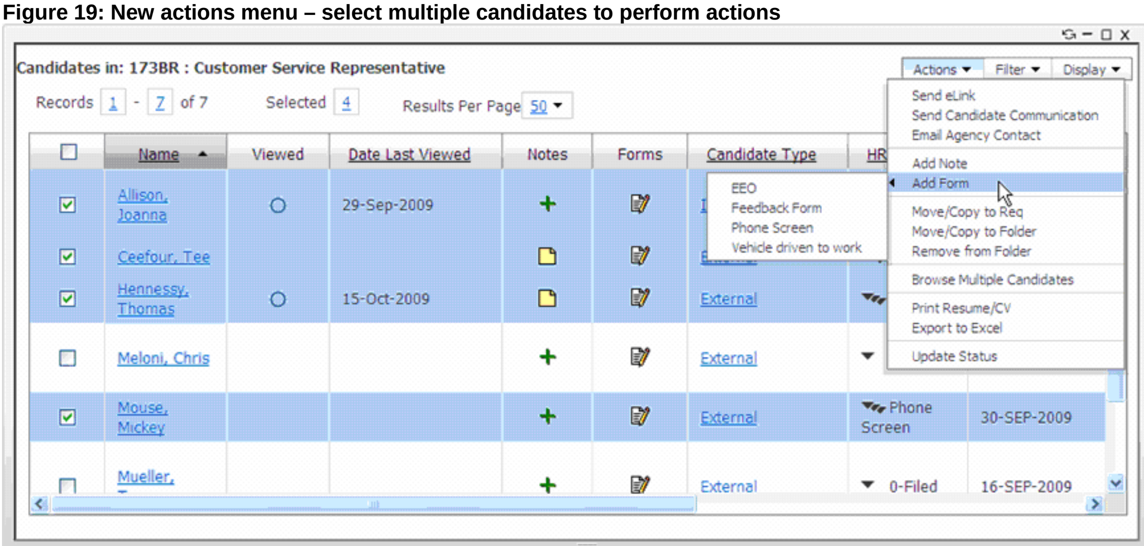
- Templates contain Req fields cannot be added from My Candidates

Export to Excel

The following items are changes from interior pages export to excel functionality and are effective for new UI only:

- If specific candidates are selected, only those will be exported.
- Notes and Forms columns will contain the words "Yes" if 1 or more notes or forms exists or the word "No" if none exist.
  - The "Viewed" column contains "No" if the user has not viewed the candidate and "Yes."

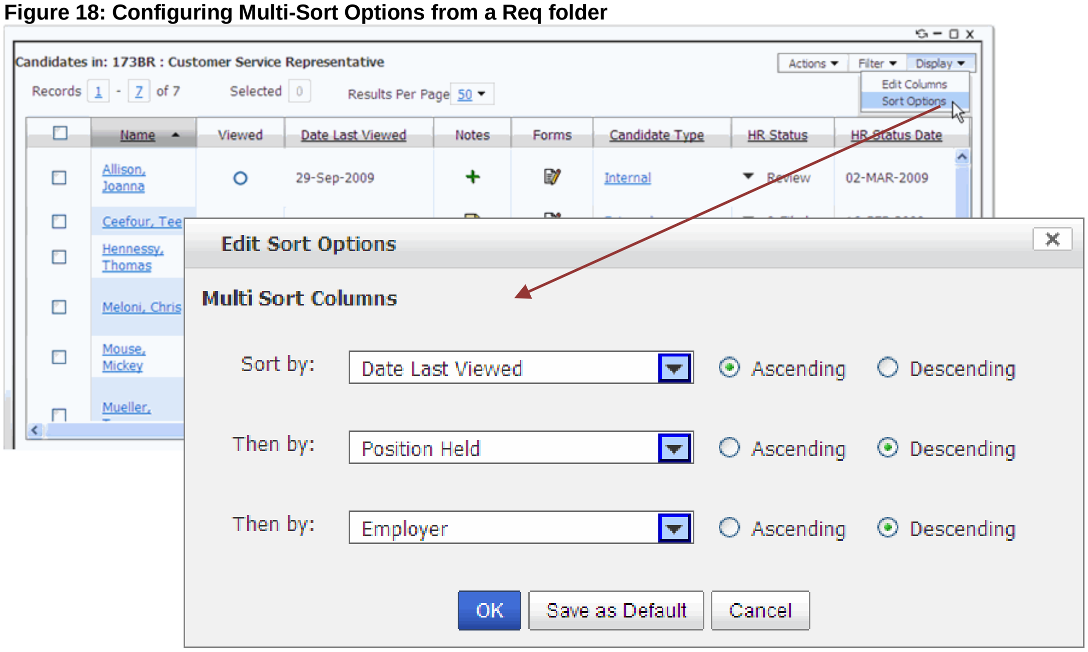
Figure 19: New actions menu – select multiple candidates to perform actions



Multi-Level Column Sorting

Three levels of sorting can be selected from the Display menu. This is similar to the multi-level sort that is supported in the KRB interior candidate grid pages.Figure 17: Configuring Multi-Sort Options from a Req folder.

Figure 18: Configuring Multi-Sort Options from a Req folder



Talent Pool Management

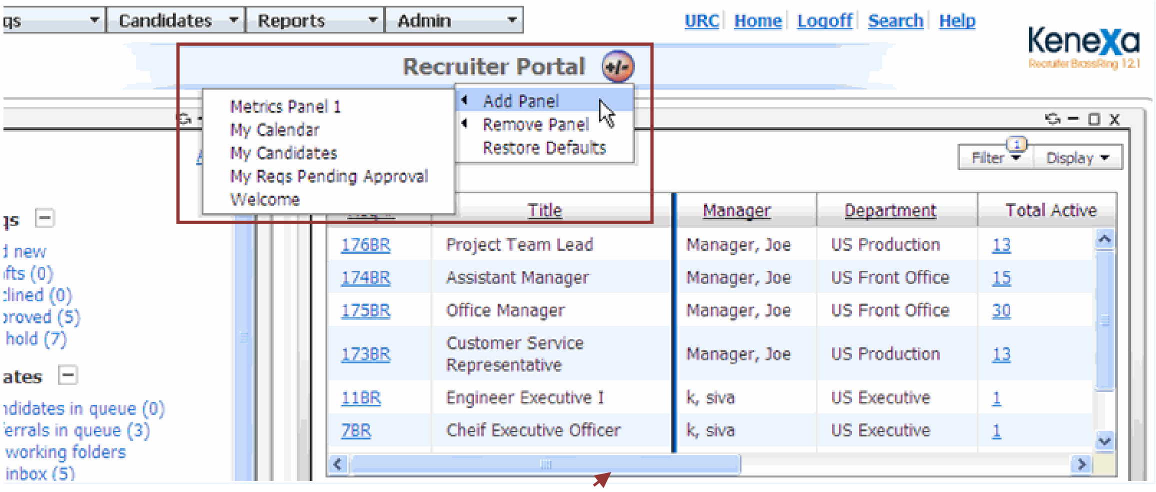
Users can select multiple candidates to perform one of 14 actions.

User/Admin Preferences

If a user type has panels that are configured with the Panel Type of **Optional** or **Default** in Workbench, then the following visible change will appear for that user:

- Panels that are NOT of the panel type **Required** will have a close icon ( ) in the top right of the panel border. This allows the user to remove the panel (with a confirmation).
- The add/remove panel icon that launches the panel administration menu will display in the title bar. From the panel administration menu the user can:
  - Add panels (of the type **Optional** or **Default)** that are not currently on the Welcome page.
  - Remove panels (of the type **Optional** or **Default)** that are currently displayed on the Welcome page.
  - Restore the page to the default layout that currently is set up in Workbench.

Figure 19: Add Panel menu item

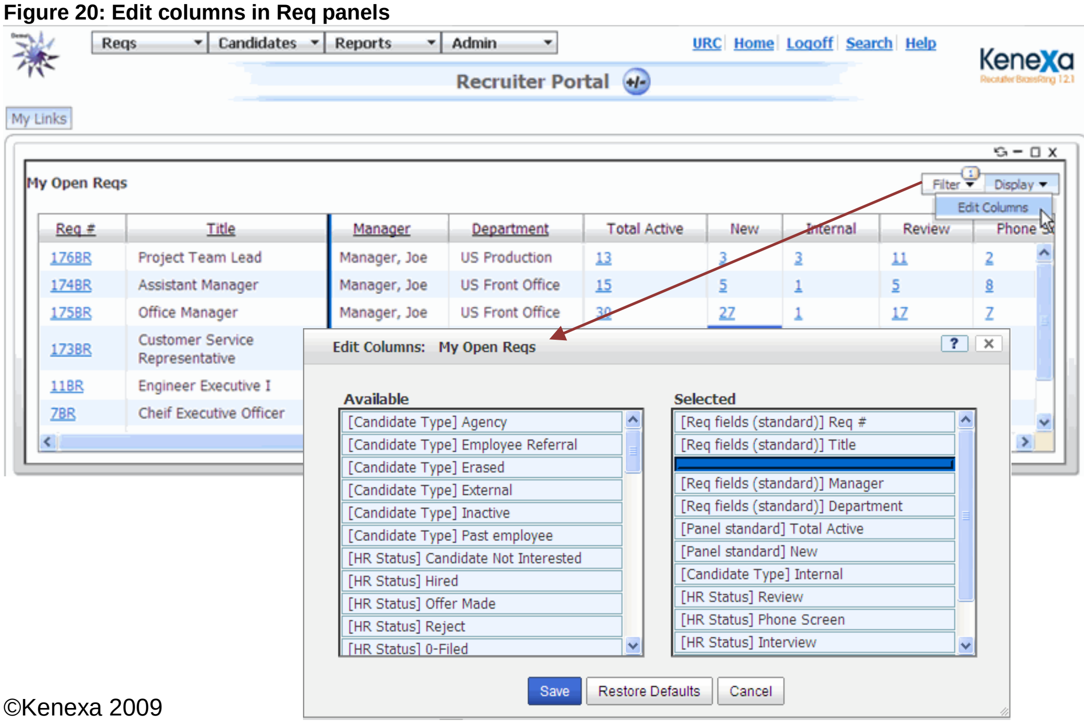


Editing Columns

Based on the Workbench panel configuration setting (**Tools > Settings > Panel configuration > Administer configuration — Allow users to edit panel display options** must be checked for the panel), users can edit columns in req panels.

- The user can search for a field as well as drag and drop it to appear in the desired order.
- Users can also drag and drop columns in the grid to change the order.
- A new field will appear in the Available column for the Candidate Results panel called **[Panel standard] Date Last Viewed**. This will display the last date that the Talent Record was viewed by the user. If the Talent Record has been viewed before 8/27/09 but not after, then the date that is displays will be the date the Talent Record was first opened.

Figure 20: Edit columns in Req panels

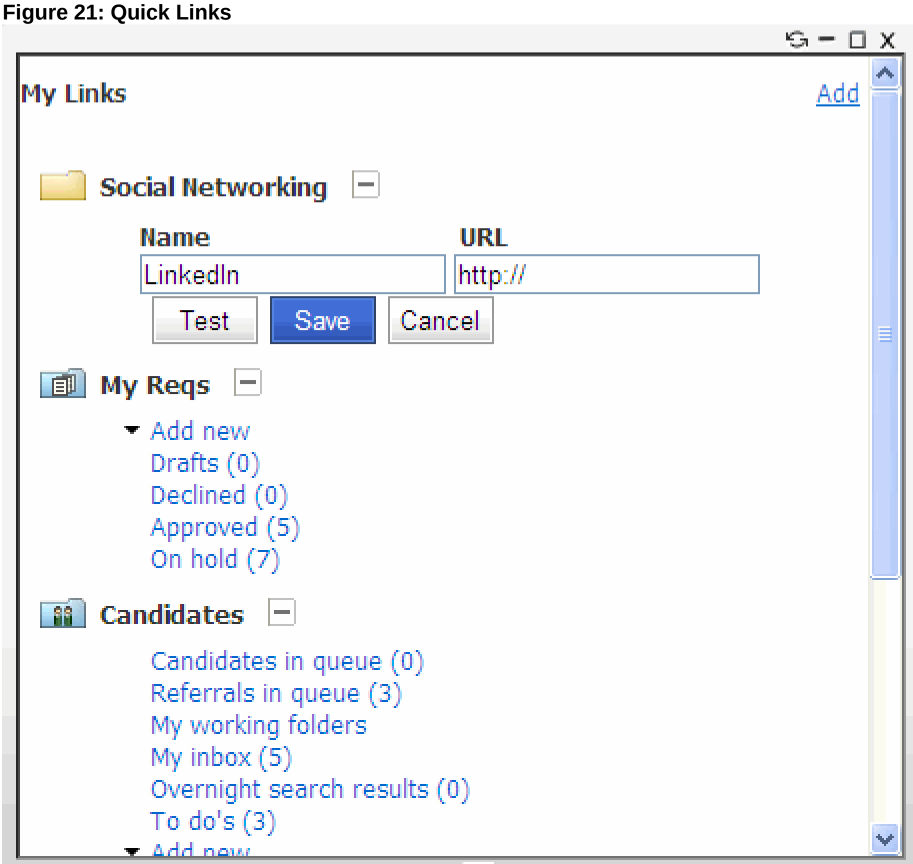


Quick Links

Based on the Workbench panel configuration setting (**Tools > Settings > Panel configuration > Administer configuration — Allow users to add/remove links and categories** must be checked for the **Quick Links** panel), users can:

- Add custom folders and external links
- Add/remove quick link categories and links
- Right click on folder and links for additional options of "Rename" and "Remove"

Figure 21: Quick Links



KRB Analytics Enhancements

Seven new Configurable Metric Panels are available in release 12.2 for greater insight into the recruiting processes. They include:

- Requisition Age
- Requisition Status
- Pipeline Cycle Time
- Hire Analysis
- Offer Success Rate
- Source Comparison
- Pipeline Conversion Rate

These additional metrics round out the analytics capabilities provided by the five previously released – Time-To-Fill, Requisition Activity, Pipeline Volume, Source Yield, and EEO Pipeline. To make these metrics available to your users, your organization must first implement the New UI in consultation with your Kenexa consultant (if it has not done so already), followed by the Metric Panels.

Date Available

This feature is available in R12.2 Build 0.

US: November 19, 2009

EU: November 25, 2009

Cost

Additional license fees apply.

How Do I Get this Feature?

The Configurable Metrics Panels are available as part of KRB Analytics. The customer must elect to use the new KRB UI to have access to these metric panels.

Business Analytics and Custom Analytics are additional parts of KRB Analytics that have not changed for release 12.2. They are handled on a case by case basis and tailored for the specific customer environment.

Benefits

KRB customers can analyze HR data captured throughout the hiring process.

Visible Changes

If KRB Analytics are already in use in your account, additional configuration tabs will be available in the KRB Workbench. Once configured for users, the additional metrics will be available for display on metric panels in the new user interface.

Limitations and Known Issues

For R12.2:

- You can enable only one metrics panel container for this release. However, users can display any configured metric in the panel simply by selecting it from a drop-down list.
- Metrics Panels are not fully localized. In a future release, titles and panel text fields comply with the KRB localization format and support all KRB languages.
- The dynamic dropdown list of X-axis options is not available on the metrics panel. Clicking on the changeover button ( ) cycles through the X-axis choices.

Configuration

With this release, customers can configure the following metrics:

- Requisition Age
- Requisition Status
- Pipeline Cycle Time
- Hire Analysis
- Offer Success Rate
- Source Comparison
- Pipeline Conversion Rate

These new metrics are in addition to the metrics already available as of release 12.1

- Time-To-Fill
- Requisition Activity
- Pipeline Volume
- Source Yield
- EEO Pipeline

Important: The steps listed below assume that your organization is already using the *New UI*, and that panels have been configured for it.

Your Kenexa consultant performs initial enablement steps for KRB Analytics. Your Tier IV Certified Workbench User performs these steps in Workbench:

1. **Kenexa or Certified Workbench Users:** Enable metrics panel privileges for KRB user types according to their roles.
2. **Kenexa or Certified Workbench User (Tier 4):** For each user type, map the metric panels that members of that user type can view in the New UI.

Your Kenexa consultant must arrange with Kenexa Engineering to have your Analytics data set generated once these steps are complete. Engineering will notify your consultant once the file is in place and the Metric Panels are ready to use.

Metrics Panel Configuration

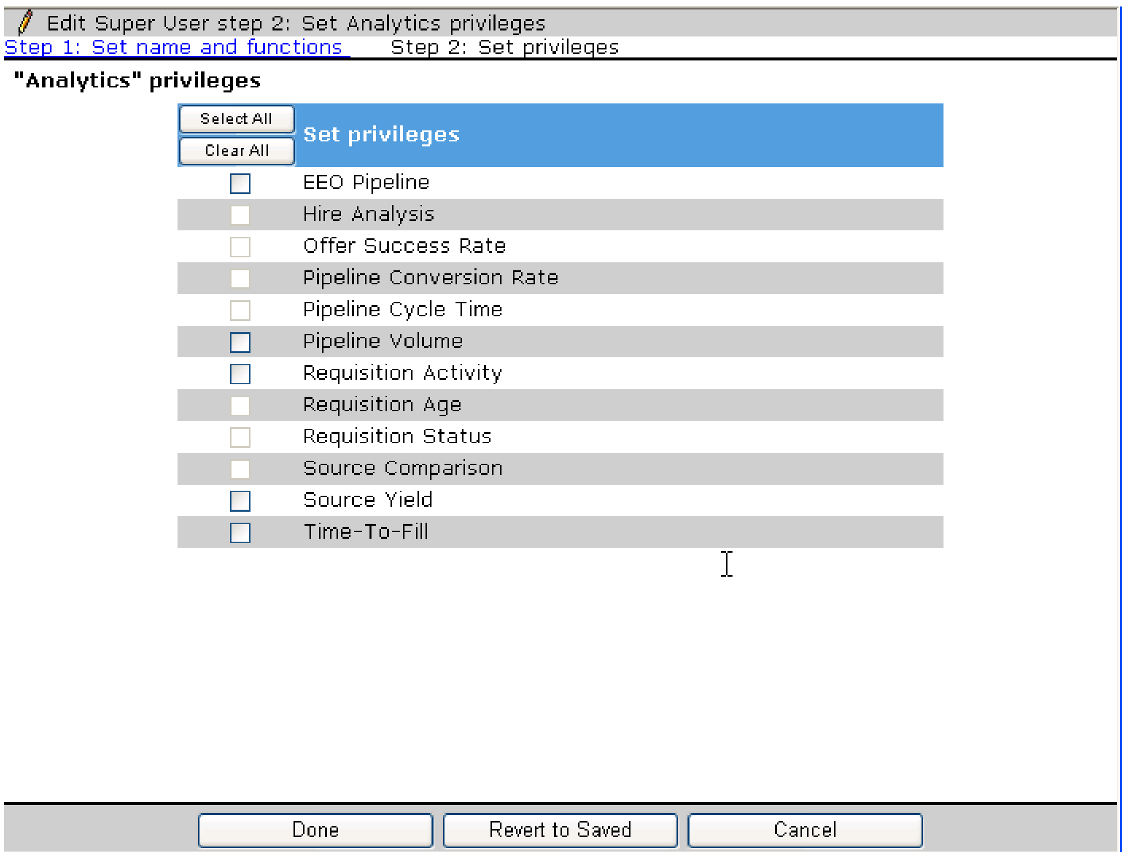
Your Kenexa consultant can configure metrics panels for the following new Standard Reports (in addition to previously-released reports for Time-To-Fill, Requisition Activity, Pipeline Volume, Source Yield, and EEO Pipeline):

- Requisition Age
- Requisition Status
- Pipeline Cycle Time
- Hire Analysis
- Offer Success Rate
- Source Comparison
- Pipeline Conversion Rate

Kenexa or Certified Workbench User: Enabling the Metrics Panel Privileges by User Type

In this step, you configure panel availability by user type after the metrics panels are configured, activated, and saved.

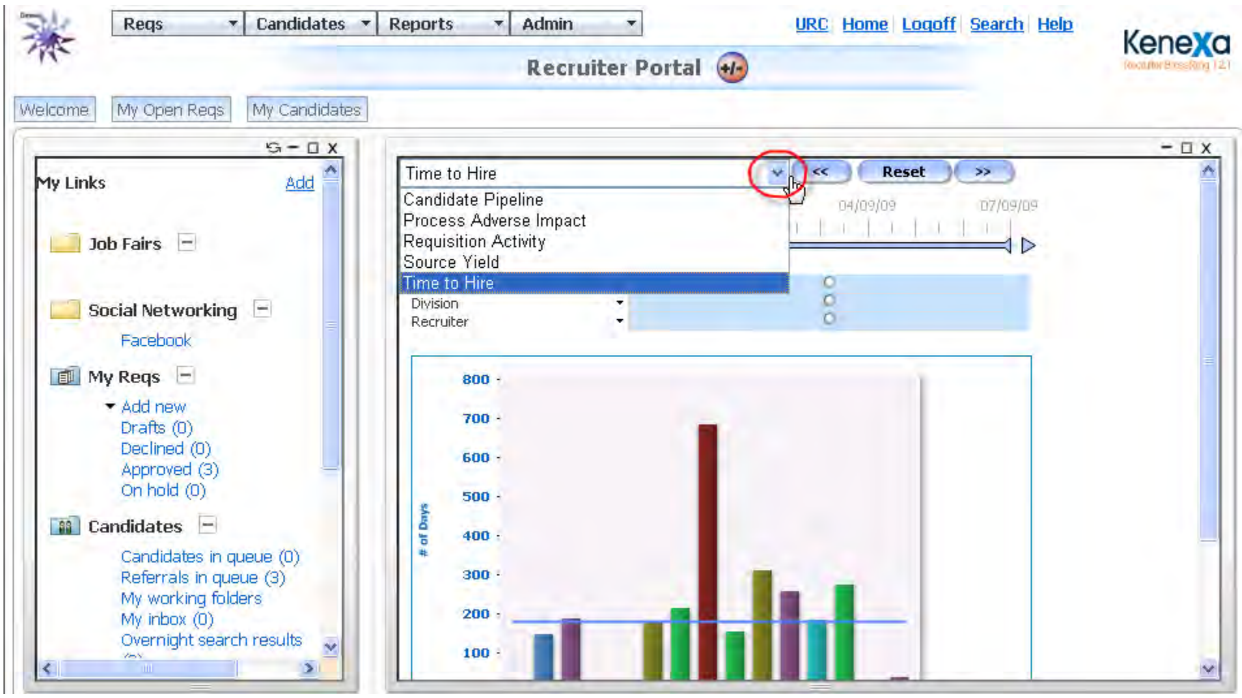
1. Select **Tools > Users > User Types.**
2. Select the user type, click the **Edit type permissions** icon, then click the **Set privileges** icon for **Analytics**.



3. On the **Analytics privileges** screen, select the configured metrics to which you are granting access. (Metrics that have not been configured have disabled checkboxes.)
4. Click **Done**.

KRB User Experience

Once the new metrics have been configured in Workbench, they are available for selection on the new UI's Welcome page by KRB users with privileges to view them. They simply select the metric of interest from the list at the top of the metric panel.



See the next several pages for information about each new metrics panel available in R12.2.

Requisition Age Metric Panel

Requisition Age is the average age (in days) for all open requisitions that are open during the selected time period, where age is calculated by taking:
Total days a requisition has been **open** minus the days **on hold**.

Requisition Age Metric panel elements

Panel Element	Description
Chart Title	Requisition Age
Chart Type	Bar chart
Y-Axis Units/Label	Avg Number of Days Open
X-Axis Groups	Recruiter, Hiring Manager, plus three configurable filter fields
X-Axis Sort	Chronologically
Filters	Date / Day only (single date) plus three common configurable filter fields

Requisition Age Calculation Example

Based on the events listed in the *Events* table below, when the user selects the dates listed in the corresponding Data table, the system calculates the Average Requisition Age for each day.

How Requisition Age Metrics are Generated

Events

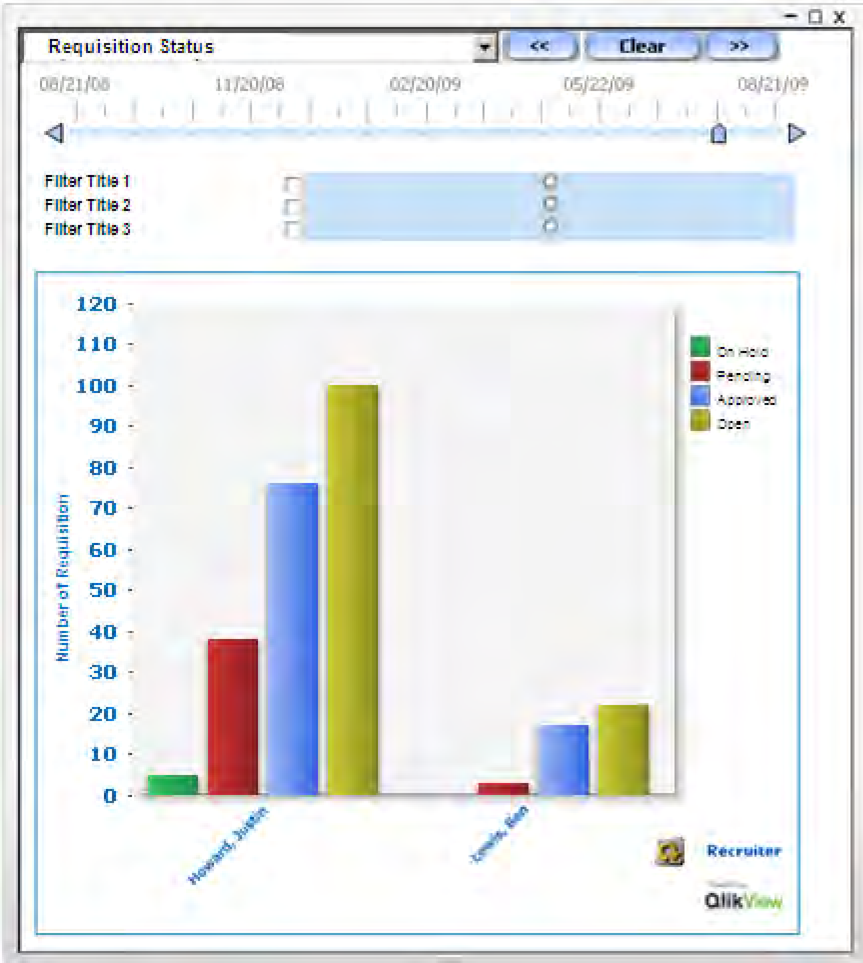
ReqID	Date	Status	
R001	1-Aug	Open	
R001	5- Aug	Closed	
R002	1- Aug	Open	
R002	6- Aug	Hold	
R002	7 Aug	Open	
R003	6-Aug	Open	

Data

Date	R001	R002	R003	Average Age
4-Aug	3	3	-	3
5-Aug	-	4	-	4
6-Aug	-	5	-	5
7-Aug	-	5	1	3
8-Aug	-	6	2	4

Requisition Status Metric Panel

The Requisition Status metric is a count of requisitions that are in specific Req Statuses on the selected day.



Requisition Status Metric panel elements

Panel Element	Description
Chart Title	Requisition Status
Chart Type	Grouped Bar chart
Y-Axis Units/Label	Number of Requisitions
X-Axis Groups	Recruiter, Hiring Manager, plus three configurable filter fields
X-Axis Sort	Alphabetically
Filters	Date / Day only (single date) plus three common configurable filter fields

Pipeline Cycle Time Metric Panel

Pipeline Cycle Time is the average number of days that candidates have spent in selected non-final HR Statuses. It includes only those candidates who are assigned to requisition folders and who have entered and exited the status during the selected time period. The system uses the same HR Statuses as the Pipeline Volume metric for the non-final statuses and ignores pre-defined system "final" statuses.

Pipeline Cycle Time Metric panel elements

Panel Element	Description
Chart Title	Pipeline Cycle Time
Chart Type	Bar chart
Y-Axis Units/Label	Avg Number of Days Candidates in HR Status
X-Axis Groups	HR Status
X-Axis Sort	Load Order

Panel Element	**Description**
Filters	Date Range (slider plus three common configurable filter fields

Pipeline Cycle Time Calculation Example

The events listed in the *Events* table below generate the corresponding data in the *Data* table. The system counts a candidate in the corresponding HR Status only if InDate and OutDate both occur on or within the selected filter date range. Any HR Status considered a "final" status.

How Pipeline Cycle Time Metric is Generated

Events

CanID	HR Status	In Date	Out Date	Days in Status
C001	1st Interview	1-Aug	6-Aug	5
C001	2nd Interview	6- Aug	12-Aug	6
C001	Initiate Checks	16- Aug	21-Aug	5
C001	Offer Extended	24- Aug	27-Aug	3
C001	Offer Accepted	27 Aug	28-Aug	1
C002	1st Interview	10-Aug	12-Aug	2
C002	2nd Interview	12-Aug	20-Aug	8
C002	Initiate Checks	25-Aug	1-Sep	7
C002	Offer Extended	10-Sep	13-Sep	3
C002	Offer Accepted	13-Sep	14-Sep	1

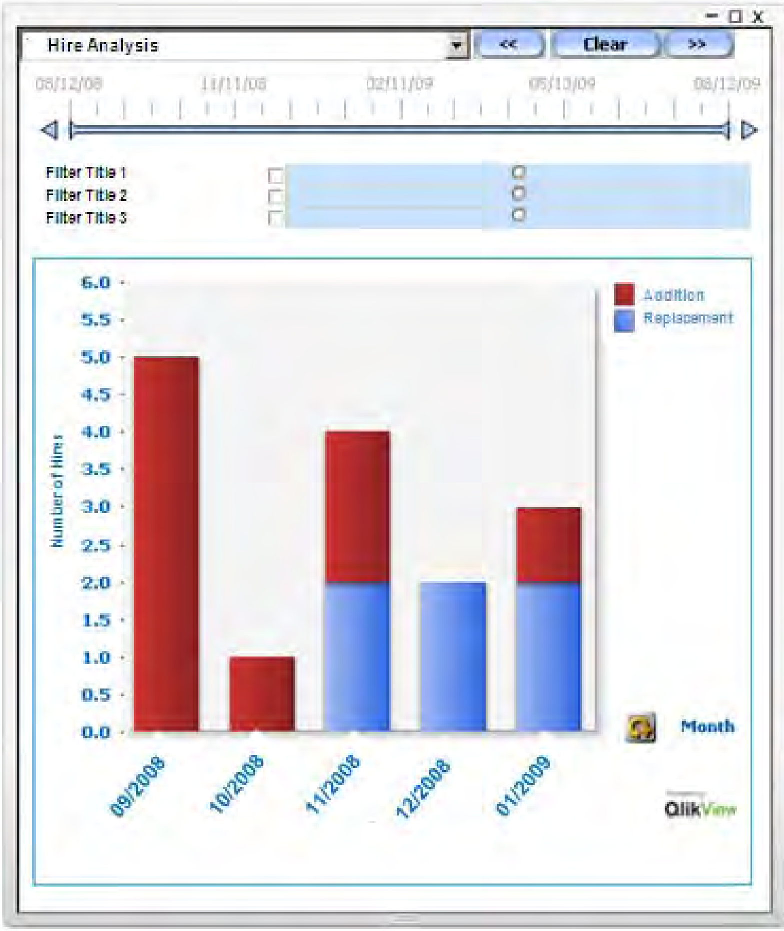
Data

	C001	C002	Average Days
1st Interview	5	2	3.5
2nd Interview	6	8	7
Initiate Checks	5	7	6
Offer Extended	3	3	3
Offer Accepted	1	1	1

Final statuses have no "out date" so cannot qualify for the date criteria. Thus, for example, if Offer Accepted were a "final" status, no calculation would be done for it.

Hire Analysis Metric Panel

The Hire Analysis metric is a count of hires in the selected date range, grouped by Addition or Replacement. This metric uses the same Hired Status as the Time-to-Fill metric, and uses the Position field of selected requisitions to determine if the req was a replacement or addition.



Hire Analysis Metric panel elements

Panel Element	Description
Chart Title	Hire Analysis
Chart Type	Stacked Bar chart
Y-Axis Units/Label	Number of Hires
X-Axis Groups	Recruiter, Hiring Manager, Month, plus three configurable filter fields
X-Axis Sort	Chronologically or alphabetically
Filters	Date Range (slider) plus three common configurable filter fields

Offer Success Rate Metric Panel

The Offer Success Rate metric is a count of offers accepted compared to offers declined in the selected date range (based on HR action date).

Your Analytics administrator selects the appropriate HR Statuses representing an accepted or declined offer.

Offer Success Rate Metric panel elements

Panel Element	Description
Chart Title	Offer Success Rate
Chart Type	Grouped Bar chart with trend lines
Y-Axis Units/Label	Number of Offers
X-Axis Groups	Recruiter, Hiring Manager, plus three configurable filter fields
X-Axis Sort	Chronologically or alphabetically
Filters	Date Range (slider) plus three common configurable filter fields

Source Comparison Metric Panel

The Source Comparison counts candidate hires and non-hires from each source during the selected period. The hires data is a count of the candidates who reached the HR Status of Hired (same Hired status as the Time-to-Fill metric).

Sources, the same as those used for the Source Yield metric, are selected by the Analytics administrator in Workbench. The top 10-15 sources are displayed in the legend. To view the next group of sources, click **Others**.

Source Comparison Metric panel elements

Panel Element	Description
Chart Title	Source Comparison
Chart Type	Grouped Bar chart
Y-Axis Units/Label	Count
X-Axis Groups	Source
X-Axis Sort	Descending values
Filters	Date Range (slider) plus three common configurable filter fields

Pipeline Conversion Rate Metric Panel

The Pipeline Conversion Rate metric shows the number of candidates who have moved out of an HR Status to a positive disposition status compared to the number who have moved out to a negative disposition status. A high number of candidates moving to a positive disposition from any status means candidates are not being screened out at that step. A lower number means more candidates are being screened out at that step.

The system uses the same HR Statuses as the Pipeline Volume metric, with "negative disposition" statuses as designated by your Analytics administrator in Workbench. The metric includes only those candidates who are assigned to requisition folders.

Pipeline Conversion Rate Metric panel elements

Panel Element	Description
Chart Title	Pipeline Conversion Rate
Chart Type	Bar chart
Y-Axis Units/Label	Count
X-Axis Groups	HR Status
X-Axis Sort	Load Order
Filters	Date Range (slider) plus three common configurable filter fields

Block Update to HR Status when Forms are Missing

Customers can block the ability for KRB users to update a candidate to one or more designated HR statuses if the specified candidate form(s) are missing. KRB displays an error message so that users know what forms are missing.

Date Available

This feature is available for use in R12 Build 1.

US: August 27, 2009

EU: September 2, 2009

Cost

There is no cost associated with this feature.

How Do I Get this Feature?

Please contact your Kenexa consultant for assistance with this feature.

Business Need

Many clients require certain information to be on file for a candidate prior to moving them forward in the hiring process (for example, an application, background screening, or assessments) and into an HR Status that will trigger a candidate export. (If that required information is not on file, the receiving system will reject the exported data.) With this enhancement, the system will check that the required forms are there before allowing the data export to take place. If the required forms are not present, the update to the HR status that triggers the export is blocked.

Benefits

This enhancement improves the accuracy of candidate data.

How It Worked Before

If your organization chooses not to turn on this feature, KRB users or the system can update HR statuses as they did in the past.

Visible Changes

There are no visible changes associated with this project.

Limitations and Known Issues

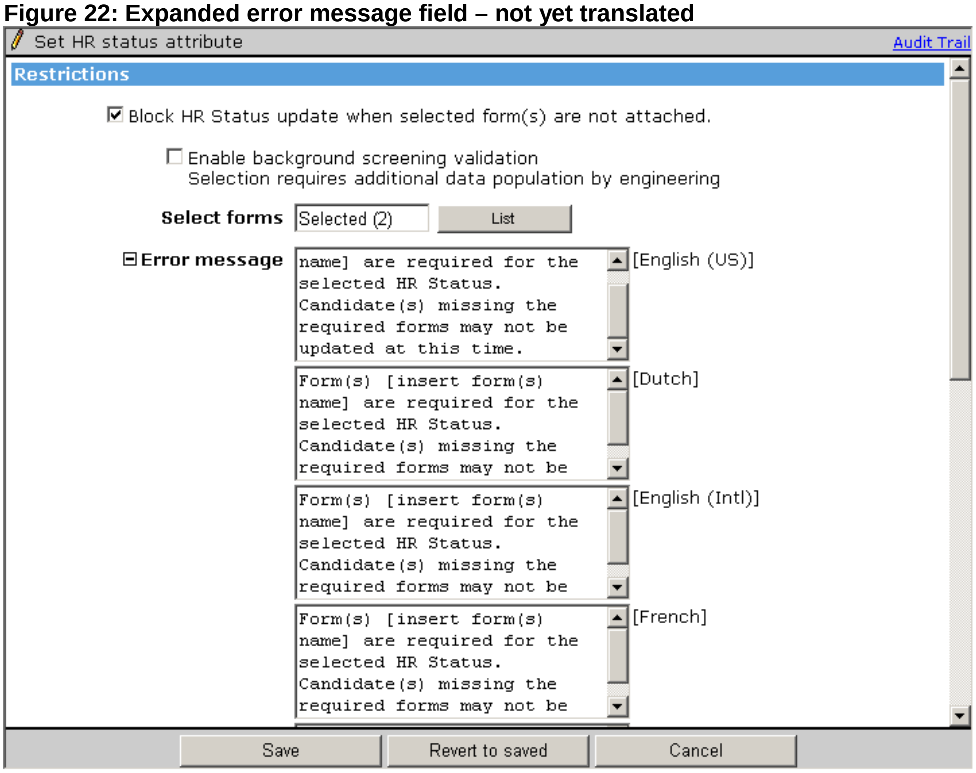
This enhancement does not provide field-level validation.

Configuration

Once this feature is enabled and configured, your organization can create a custom error message, along with translations, to be displayed when forms are missing. The default error message text is for all applicable languages.

– You can enter a customized error message of up to 1000 characters.
– This field does not support HTML.
– If you delete the default text for any reason and do not enter a customized message, the default message is restored and displays to users.

Figure 22: Expanded error message field – not yet translated



Click **Save** when you are finished. Workbench updates the HR status attributes and error message text (if applicable).

User Experience

KRB users who are updating to an HR status with the “Block update” attribute enabled will see some changes when updating statuses for one or multiple candidates. These changes are present in both the new UI and classic KRB.

Updating a Single Candidate

Figure 23: Click to update HR status for one candidate

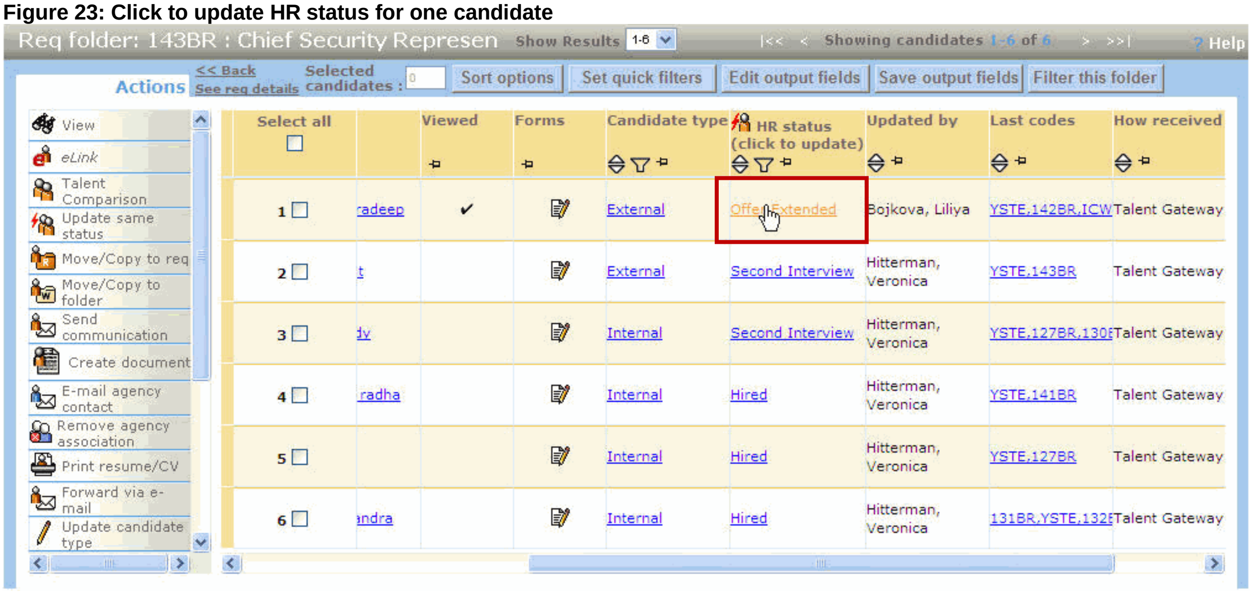


Figure 24: Click to update HR status from the Talent Record

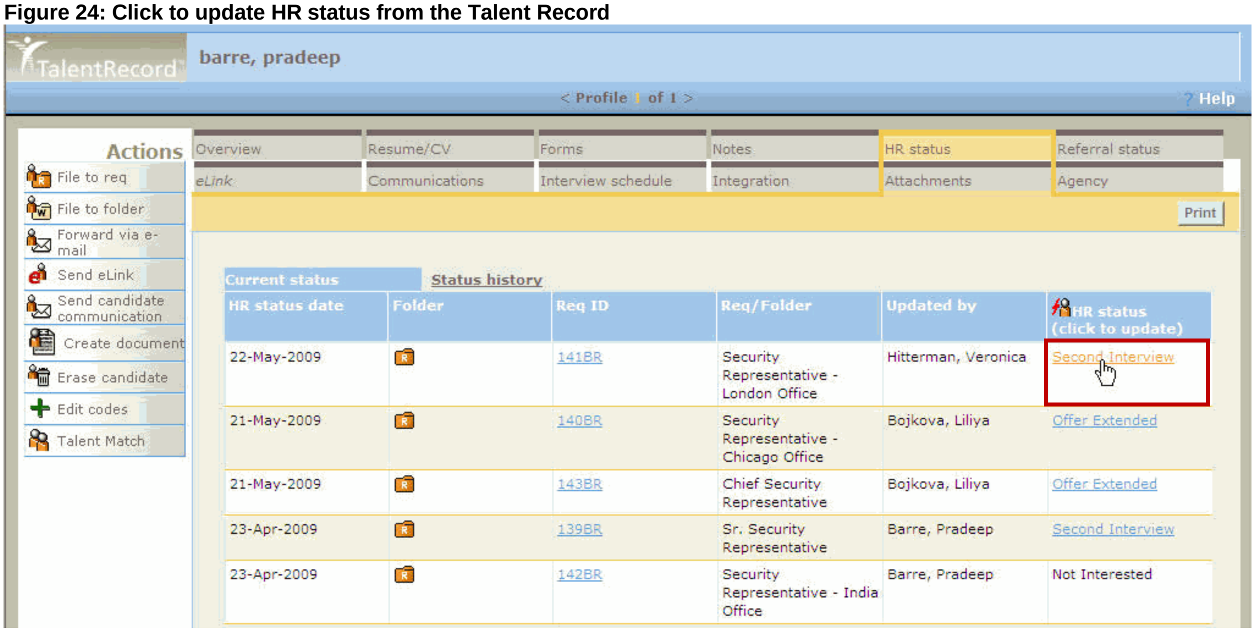
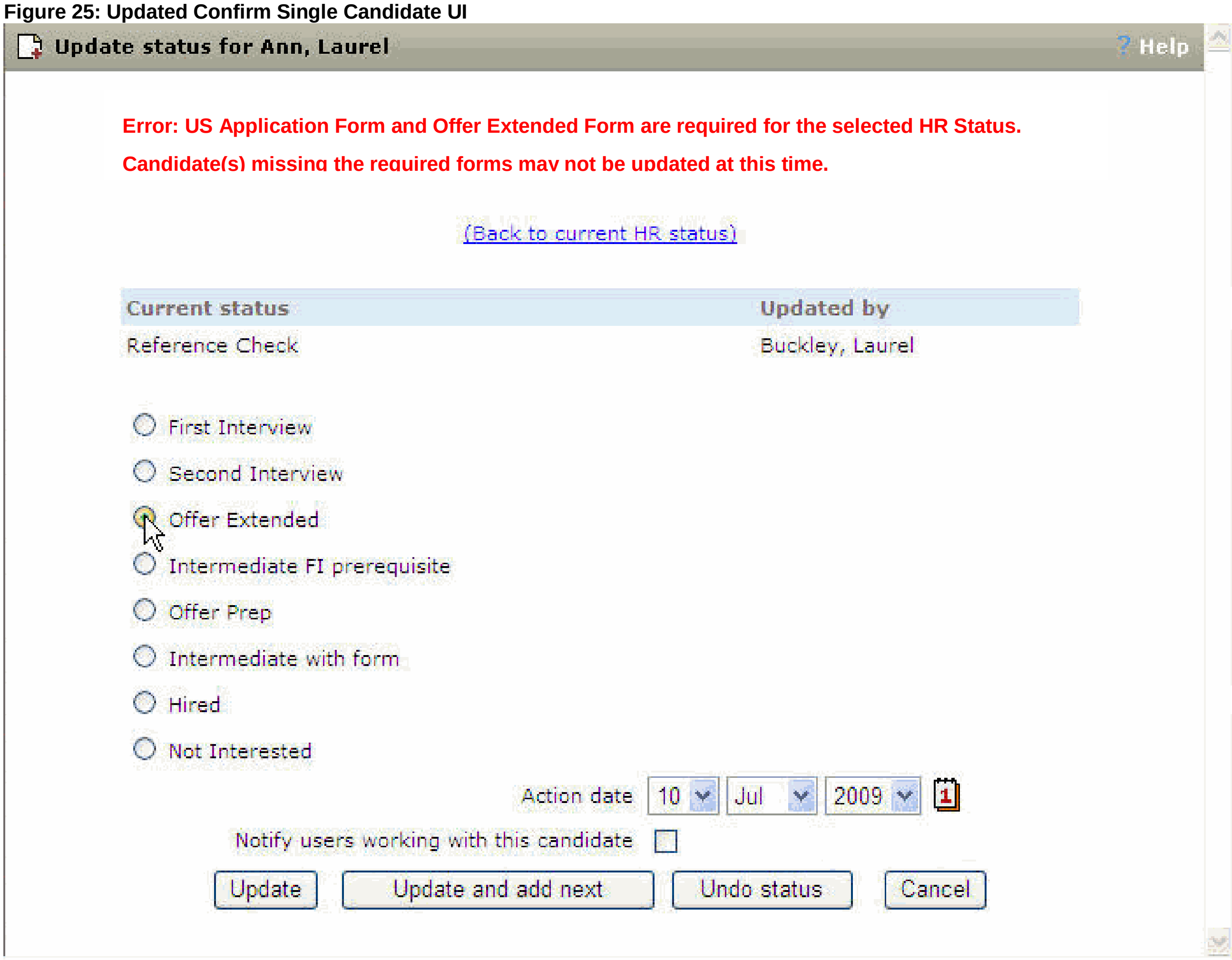


Figure 25: Updated Confirm Single Candidate UI



Updating Statuses for One Candidate

The rules below apply everywhere that KRB users can update the HR status for single candidates.

When you click **Update** or **Update and add next** the **Update same status** window displays with the selected candidates. The system checks that:

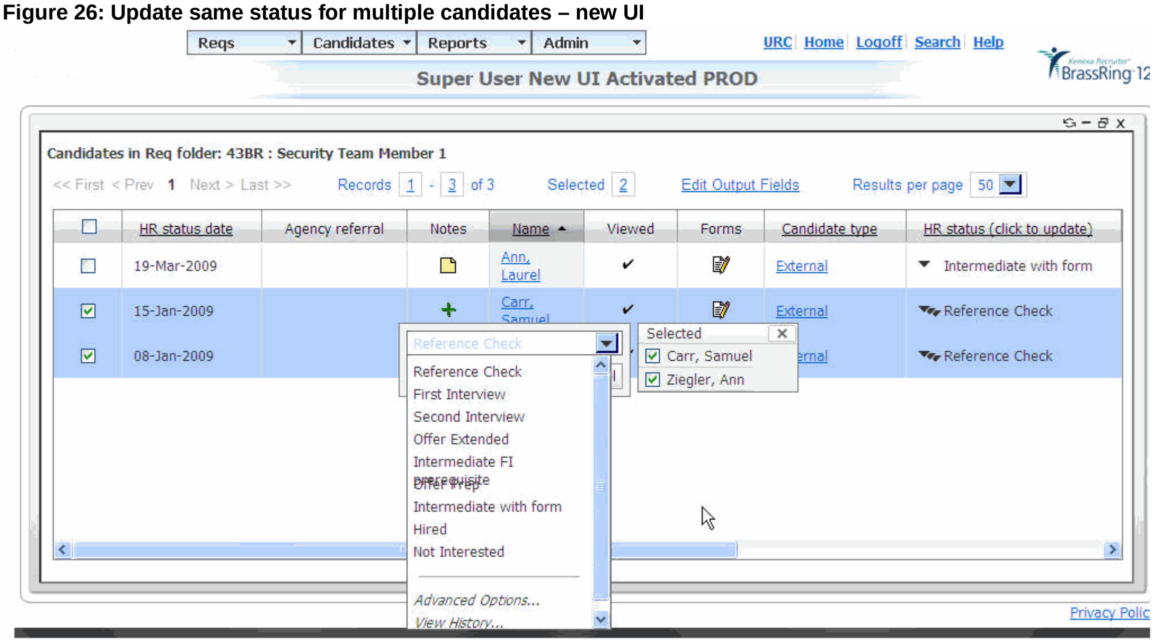
1. The selected HR status is associated with a Candidate Export. If it is, the system blocks the action and displays the following error message to the user. "*This HR Status is associated with a candidate export process and may only be used during a single candidate update.*"
2. The required forms (according to the HR status setup) are attached.

   If a candidate does not have the required forms, the candidate is de-selected and displayed in red and KRB displays the following error message: "*Form(s) [form(s) name] are required for the selected HR Status. Candidate(s) missing the required forms may not be updated at this time.*"

Updating Statuses for Multiple Candidates

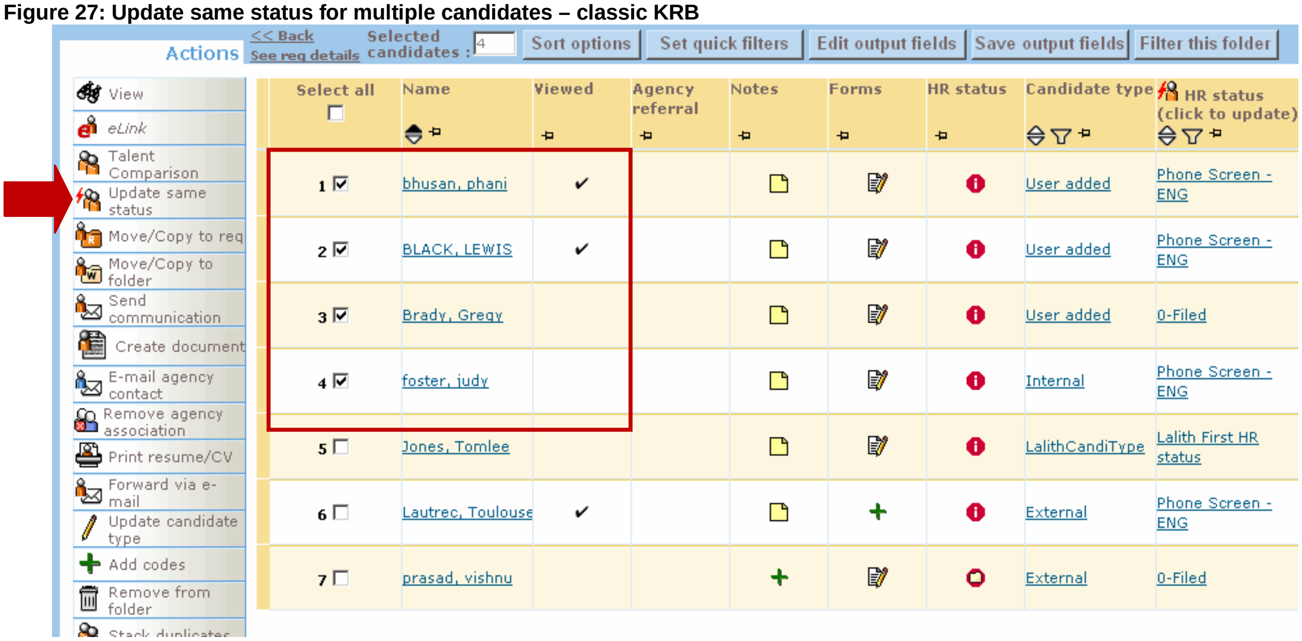
In the new UI, users see the following:

Figure 26: Update same status for multiple candidates – new UI



In classic KRB, users see the following:

Figure 27: Update same status for multiple candidates – classic KRB

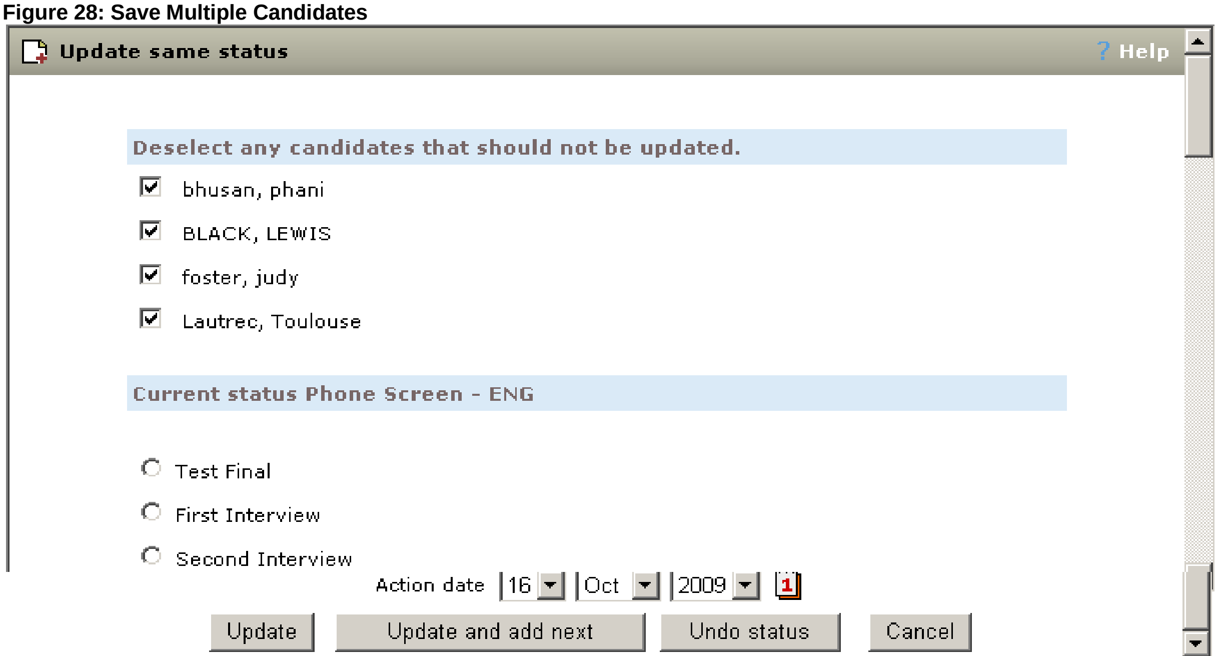


Both in the new UI and in Classic KRB, users can select multiple candidates with a matching HR status and select an action to update all to a new HR status. This is existing functionality.

If the HR status attribute is set for this HR status, the following rules apply when working on this screen:

– If the KRB user is taking action outside the req folder, the system blocks the update of the HR status if a single per candidate form is required.
– If single/candidate/req form is required, KRB users can perform the update within a Req folder only.

Figure 28: Save Multiple Candidates



Saving Multiple Candidates

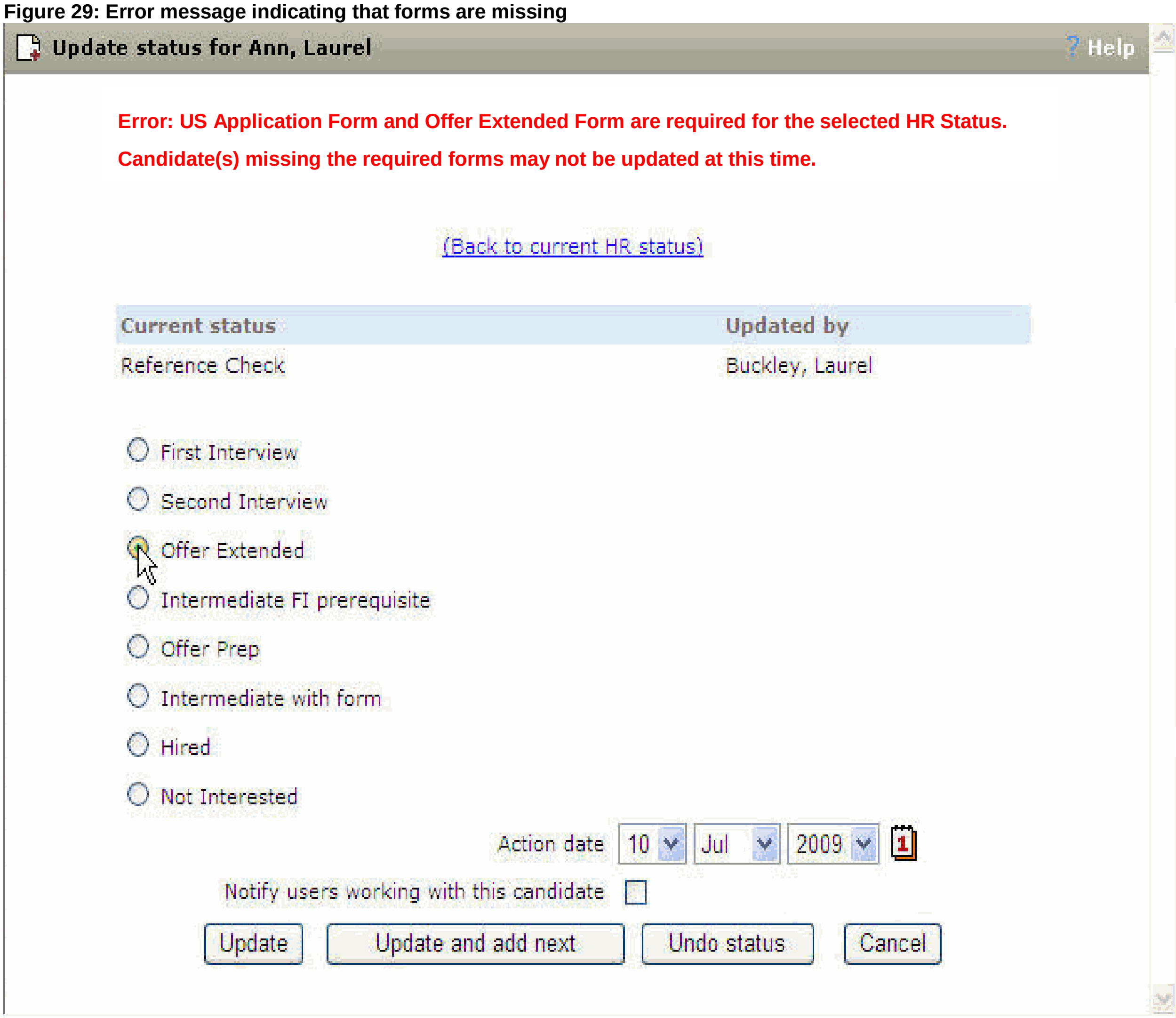
The rules below apply everywhere that KRB users can update multiple HR statuses.

When you click **Update** or **Update and add next** the **Update same status** window displays with the selected candidates. The system checks that:

1. The selected HR status is associated with a Candidate Export. If it is, the system blocks the action and displays the following error message to the user. "*This HR Status is associated with a candidate export process and may only be used during a single candidate update.*"
2. The required forms (according to the HR status setup) are attached.

   If a candidate does not have the required forms, the candidate is de-selected and displayed in red and KRB displays the following error message: "*Form(s) [insert form(s) name] are* *required for the selected HR Status. Candidate(s) missing the required forms may not be updated at this time.*"

Figure 29: Error message indicating that forms are missing



Block eLinks to Non-System Users

Your organization can elect to hide by user type the option to send an eLink to non-system users whether they are the main recipients (To:) and, in some cases, the secondary recipients (Cc: and Bcc:) of the eLink by enabling the new **Communications** user type setting, **Hide communications /elinks for non-system users**. When this setting is turned on for a user type, the options (To, Cc, and Bcc) to send eLinks to non-system users are hidden.

When the setting is enabled, it affects the following pages:

- eLink candidate
- eLink forms
- Request interview
- Schedule interview

The **To non-system user** text box is removed in the following cases:

- When eLinking candidates:
  - When you eLink a talent record from the **Actions** menu in the candidate listing page in a req folder
  - When you send an eLink from a talent record
  - When you send an eLink from the eLink tab of the talent record

- When you are eLinking forms from the **Forms** tab of the talent record:
  - When you click the **eLink blank form** button
  - When you click the **eLink** icon in the eLink form column

- When requesting or scheduling an interview
  - When you click the **Send interview request** button on the **Interview schedule** tab of the talent record.
  - When you click the **Schedule interview** button on the **Interview schedule** tab of the talent record.

- When the client setting Elink Cc/Bcc is set to Yes AND the user type privilege Hide communication/eLink for non-system users is checked.

Note: This enhancement does not affect Single Sign On (SSO) workflow. If your organization has Single Sign On enabled, the system follows the SSO guidelines for non-system users.

Date Available

This feature is available for use in R12.1 Build 3.

US: October 8, 2009
EU: October 14, 2009

Cost

No additional cost.

How Do I Get this Feature?

Please contact your Kenexa consultant for assistance with this feature.

Benefits

Your organization can restrict by user type the sending of eLinks to system users only. For example, you might want to allow your Recruiters and Hiring Managers to send eLinks to non-system users, but stop other user types from sending eLinks to non-system users.

How It Worked Before

Users could send eLinks to non-system users in a variety of scenarios.

Visible Changes

None.

Limitations and Known Issues

The following eLink functionality is not included in this enhancement:

- The **Send communication** action sends e-mails and letters to candidates (not system users).
- The **Forward via e-mail** action sends eLinks only to non-system users.
- Assessments are sent to candidates (non-system users)
- The candidate **Search** e-mail section is for candidates (non-system users).
- eLinking blank reqs are not part of this project.

Configuration

There is a new user type privilege in the **Communications** group called **Hide communication/eLinks to non-system users**.

eLink Cc/ Bcc setting

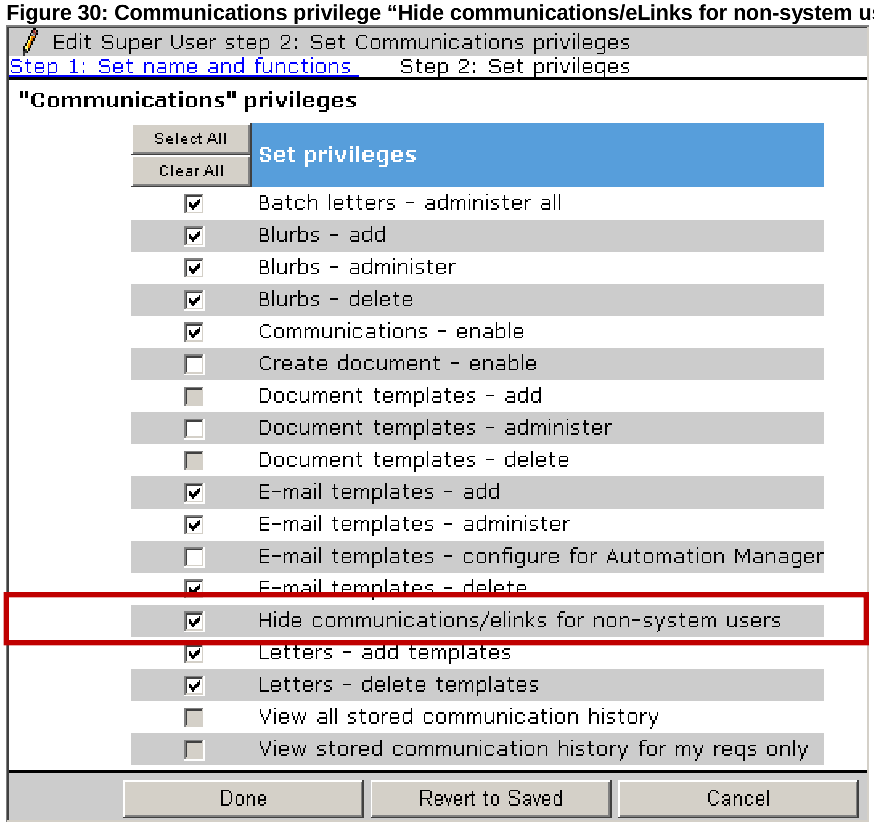
To display **Cc:** or **Bcc:** address boxes, the client setting **eLink Cc/Bcc** must be set to **Yes**.

When this privilege is enabled, the system does not display the following text boxes when sending an eLink communication:

- To: Non-system User, in all the cases listed

AND, if the client setting eLink Cc/Bcc is turned (set to **Yes**), and the new user privilege **Hide communication/elink** is enabled, **the user privilege over rides the client setting** such that the e-mail address text box does NOT display for non-system users for cc or bcc.

Figure 30: Communications privilege "Hide communications/eLinks for non-system users"



User Experience

This new user type privilege affects the following types of candidate communications:

Table 1: eLink actions affected by new user type privilege

Location	Actions
Action Menu	eLink candidate
Forms tab	eLink blank form
Forms tab	eLink icon - View/Edit/Add completed form approval
eLink tab	Send eLink – eLink candidate
Interview schedule tab	Send interview request
Interview schedule tab	Schedule interview

eLinking a Candidate's Talent Record and Forms from a Req or Working Folder

There are multiple paths for eLinking a candidate's talent record and candidate forms from a Req folder or Working folder. Here are two examples:

eLinking a Selected Candidate in a Req folder from the Actions Menu

1. Navigate to Req folder with Open reqs. (**Reqs > View My Reqs | View All Reqs > Open >** Click the desired Req folder.)
2. Select a candidate.
3. Click **eLink** in the **Actions** menu.
4. The **eLink candidate window** opens.
5. If the new setting is turned on, it displays address boxes for system users only.

eLinking from the eLink Tab of the Candidate's Talent Record

1. Navigate to a Req folder with Open reqs. (**Reqs > View My Reqs | View All Reqs > Open >** Click the desired Req folder.)
2. Click a candidate's name to open the Talent Record.
3. Select the **eLink** tab.
4. Click **Send eLink**.
5. The **eLink candidate** window opens.
6. If the new setting is turned on, it displays address boxes for system users only.

Figure 31: eLink candidate send page when Hide communications/elinks for non-system users privilege is not enabled

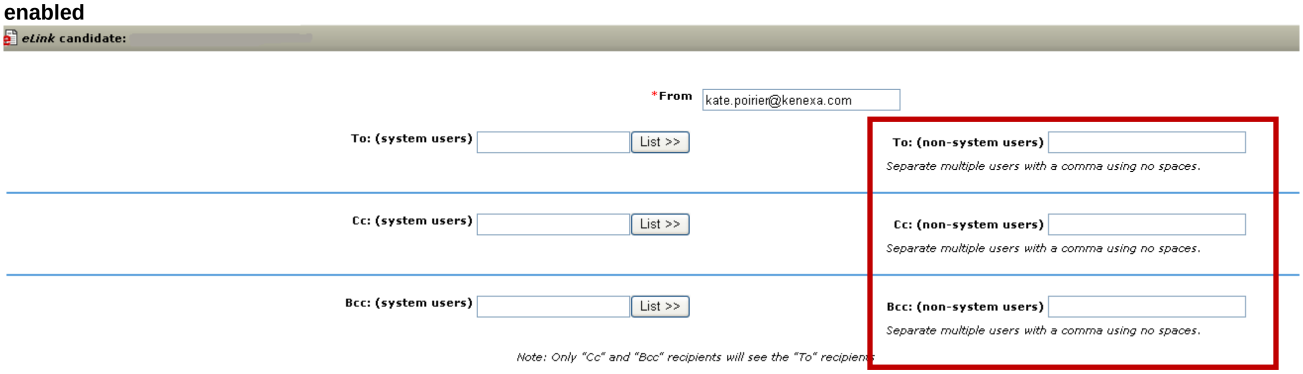
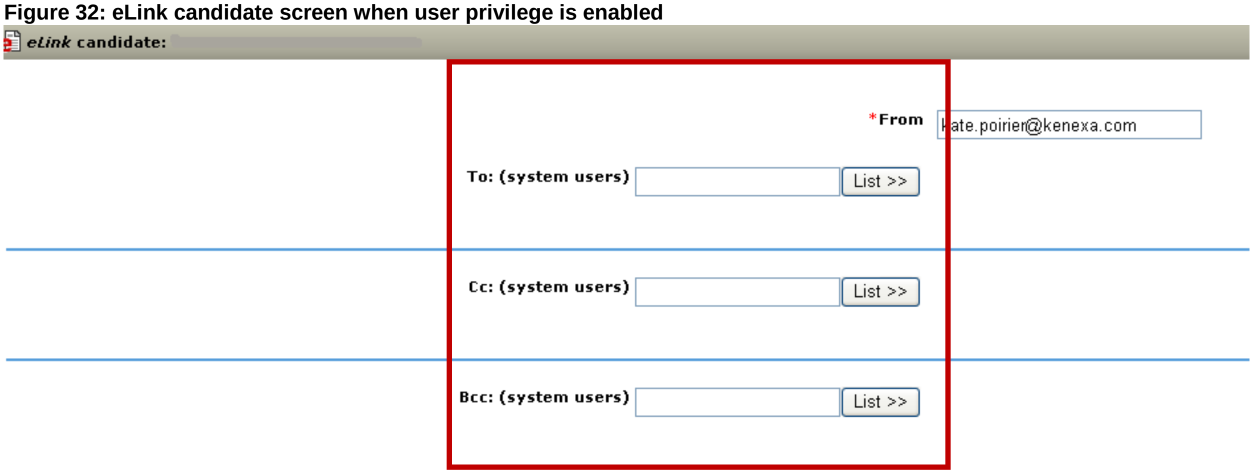


Figure 32: eLink candidate screen when user privilege is enabled



eLink History

When the new user type privilege is enabled, the **eLink history** contains e-mail addresses only for system users in the **Recipient e-mail** column of **Candidate eLink history** and **Form eLink history**.

eLinking Form Approvals from the Talent Record

1. Navigate to a Req folder with Open reqs. (**Reqs > View My Reqs | View All Reqs > Open >** Click the desired Req folder.)
2. Click a candidate's name to open the Talent Record.
3. Select the **Forms** tab.
4. Click **eLink form**.
5. The eLink **form to view/edit and approve** option displays.
6. The **eLink candidate** window opens.
7. If the new setting is turned on, it displays address boxes for system users only.

Figure 33: eLink form to view/edit/approve window, new user privilege not enabled

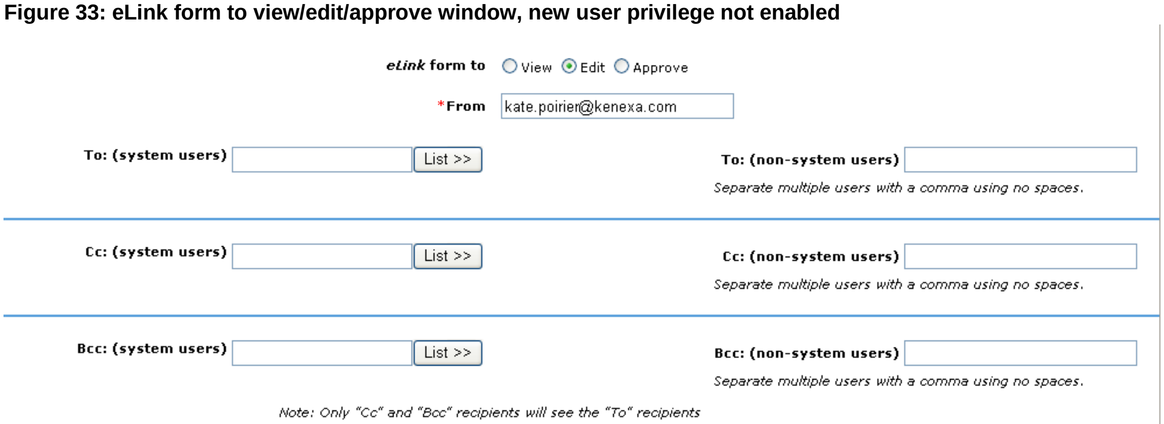
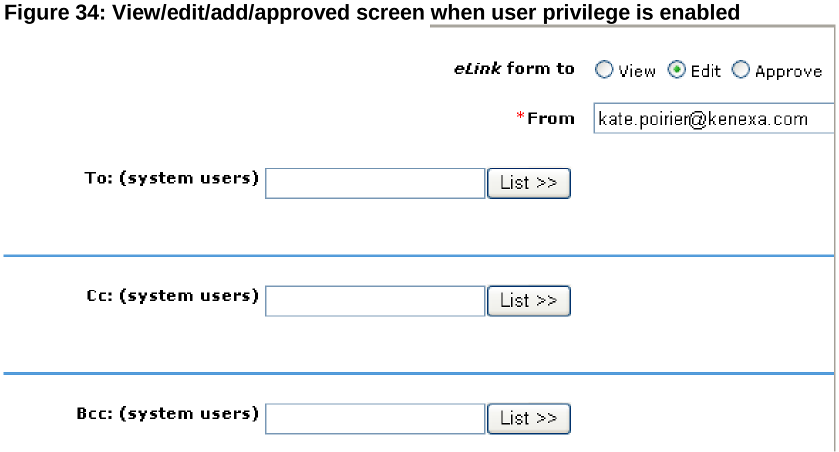


Figure 34: View/edit/add/approved screen when user privilege is enabled



Request Interview from the Req Folder or Working Folder

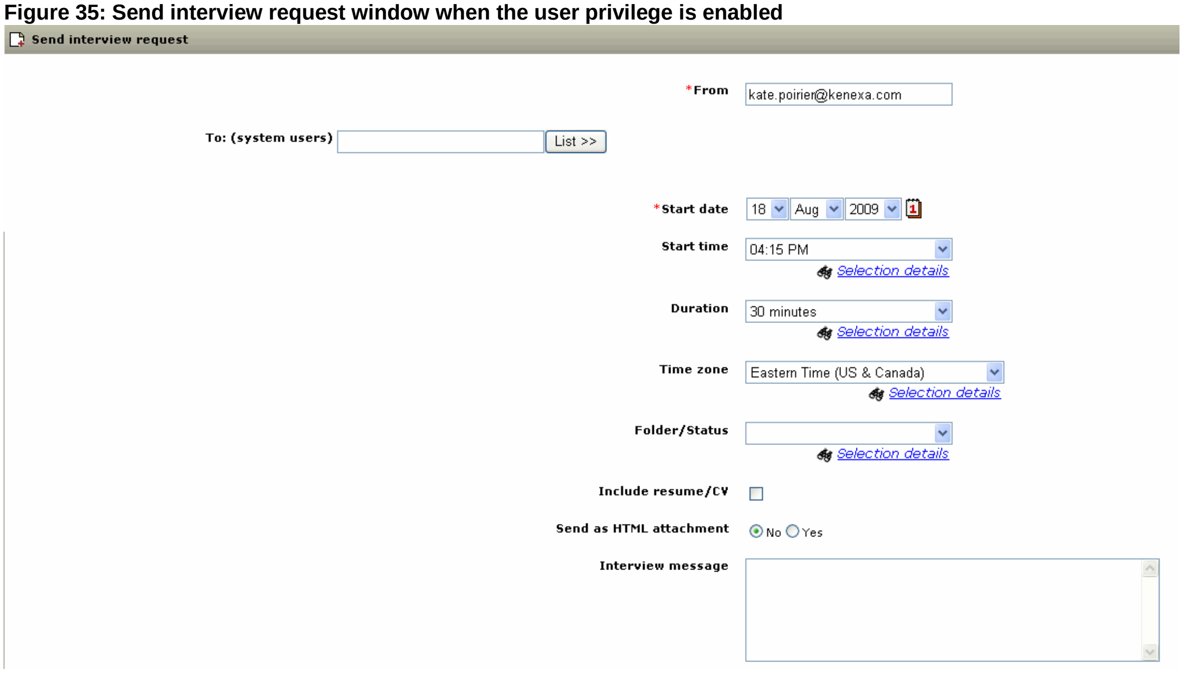
1. Navigate to a Req folder with Open reqs. (**Reqs > View My Reqs | View All Reqs > Open >** Click the desired Req folder.)
2. Click a candidate's name to open the Talent Record.
3. Select the **Interview schedule** tab.
4. Click the **Select interview request** button.
5. The **Send interview request** window displays without the "**To non-system user**" textbox.

Schedule Interview from the Req Folder or Working Folder

1. Navigate to a Req folder with Open reqs. (**Reqs > View My Reqs | View All Reqs > Open >** Click the desired Req folder.)
2. Click a candidate's name to open the Talent Record.
3. Select the **Schedule interview** tab.
4. Click the **Schedule interview request** button.
5. The **Schedule interview** window displays without the "**To non-system user**" textbox.

Note: The **Send interview request** window and **Schedule interview** window are identical.

Figure 35: Send interview request window when the user privilege is enabled



Interaction between eLink Cc/Bcc Setting and the Hide … eLinks Setting

To display **Cc:** or **Bcc:** address boxes, the client setting **eLink Cc/Bcc** must be set to **Yes**.

Combination #1

When

eLink Cc/Bcc = **No**

AND

Hide communication/eLinks to non-system users = **No**

You see the **To** address box for system users and non-system users.

Figure 36: Combination #1

Combination #2

When

eLink Cc/Bcc = **Yes**

AND

Hide communication/eLinks to non-system users = **No**:

You see **To**, **Cc**, and **Bcc** address boxes for system users and non-system users.

Figure 37: Combination #2

Combination #3

When

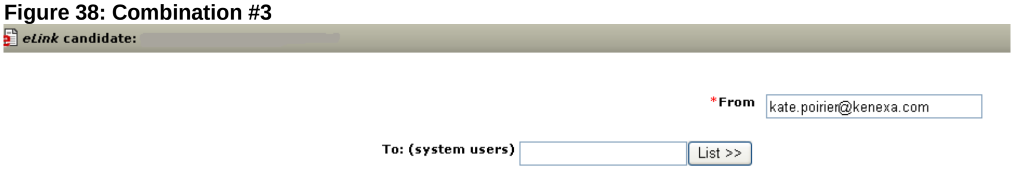
eLink Cc/Bcc = **No**

AND

Hide communication/eLinks to non-system users = **Yes**:

You see only the **To** address box for system users.

Figure 38: Combination #3



Combination #4

When

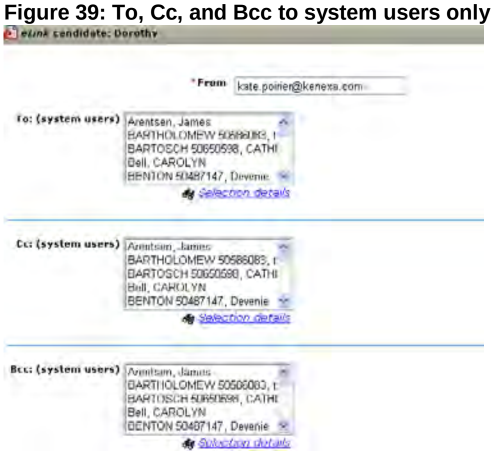
eLink Cc/Bcc = **Yes**

AND

Hide communication/eLinks to non-system users = **Yes**:

You see the **To** address box for system users only. The new user type privilege overrides the client setting; accordingly, you see “system users, “cc: system users” and “bcc: system users” only, as shown in the screen capture below.

Figure 39: To, Cc, and Bcc to system users only



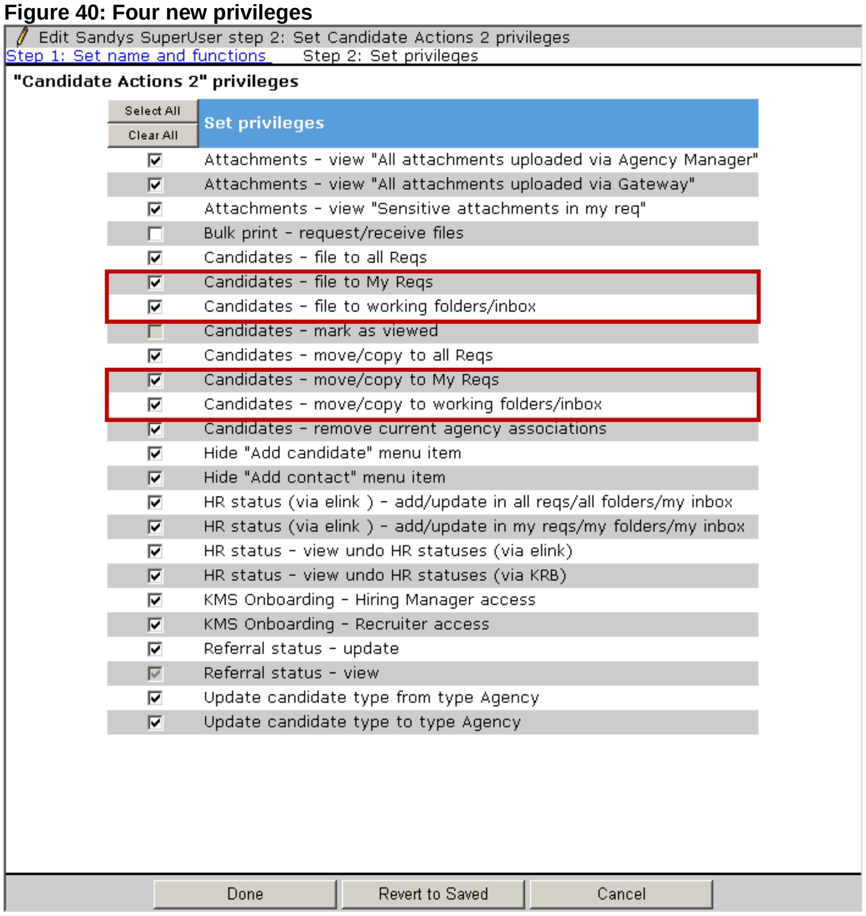
Separate Privileges for Req and Working Folders

The candidate actions privilege for filing candidates to My Reqs and working folders/inbox (**Candidate – file**) has been split into two privileges. The Candidate Actions privilege for moving/copying candidate to My Reqs and working folders/inbox (**Candidate – move/copy**) has been split into two privileges. The new privileges are on the "Candidate Actions 2" privileges page in Workbench. Table 2 lists the updated privileges.

Table 2: Four new privileges on the Candidate Actions 2 page

Previous Privileges	New Privileges
Candidate – file	Candidate – file to My Reqs
	Candidate – file to working folders/inbox
Candidate – move/copy	Candidate – move/copy to My Reqs
	Candidate – move/copy to working folders/inbox

Figure 40: Four new privileges



Date Available

This feature is available for use in R12 Build 1.

US: August 27, 2009

EU: September 2, 2009

Cost

There is no additional cost associated with this feature.

How Do I Get this Feature?

KRB user types who had the Candidate – file and/or Candidate – move/copy privileges before this enhancement maintain their ability to file to both My Reqs and working folders/inbox and/or move/copy to My Reqs and working folders/inbox.

Your Kenexa Consultant or Certified Workbench User can assign the new privileges differentially to different user types as desired in Workbench.

Benefits

Clients can better control the actions that user types are able to take. The privileges will be relocated so that they are together and can be easily seen if a user type has these privileges enabled or not.

How It Worked Before

KRB users with one or both of the privileges as they existed before could file and/or move/copy to both My Reqs and working folders/inbox. Clients could not restrict users to either My Reqs or working folders/inbox.

In KRB, when that user type privilege was enabled for a KRB user's user type, the user could see Move/Copy to Req and Move/Copy to folder in the Actions menu on Req pages.

When viewing the talent record associated with a requisition, the Actions menu displayed File to req and File to folder.

Visible Changes

There are visible changes associated with this feature in Workbench. All of the new privileges are listed the "Candidate Actions 2" privileges page. The previous privileges were listed both on the "Candidate Actions" and "Candidate Actions 2" privileges pages.

Migration and New Client Creation

For all existing user profiles, both new File and Move/Copy privileges are enabled automatically if users had the privileges enabled before the enhancement.

When a new client is created standard user types have the following settings for these privileges by default:

Hiring Manager

- Candidate – file to My Reqs: remain checked
- Candidate – file to working folders/inbox: set to checked
- Candidate – move/copy to My Reqs: remain checked
- Candidate – move/copy to working folders/inbox: set to checked

HR Staff

- Candidate – file to My Reqs is checked
- Candidate – file to working folders/inbox is checked
- Candidate – move/copy to My Reqs is checked
- Candidate – move/copy to working folders/inbox: set to checked

QuickStart User

- Candidate – file to My Reqs is un-checked
- Candidate – file to working folders/inbox is un-checked
- Candidate – move/copy to My Reqs is un-checked
- Candidate – move/copy to working folders/inbox is un-checked

HR Executive

- Candidate – file to My Reqs is un-checked
- Candidate – file to working folders/inbox is un-checked
- Candidate – move/copy to My Reqs is un-checked
- Candidate – move/copy to working folders/inbox is un-checked

Super User

- Candidate – file to My Reqs is checked
- Candidate – file to working folders/inbox is checked
- Candidate – move/copy to My Reqs is checked
- Candidate – move/copy to working folders/inbox is checked

Score Multiple Questions in One Window

With this enhancement, Recruiters working on the **Edit site questions** page can click the new **Multiple scoring** button, score multiple questions on one page, and save the results. The **Multiple scoring** button is translated to all languages in which the requisition has been created. All Talent Gateway questions and their options are listed on the **Edit site questions** page.

Access to the **Multiple scoring** button and page is controlled by a new user type privilege in the Talent Gateway functional area, **Questions – multiple questions scoring**. This privilege is active for use only if the **Questions – edit questions and scoring privilege** is enabled for a given user type.

Date Available

This feature is available for use in R12.1 Build 2.

US: September 17, 2009

EU: September 23, 2009

Cost

No additional cost.

How Do I Get this Feature?

Your Kenexa consultant or Certified Workbench user must enable the Talent Gateway user type privilege **Questions – multiple questions scoring** for those user type(s) that should have access to this functionality.

Benefits

Recruiters can quickly score multiple questions on one page and save the data.

How It Worked Before

KRB users had to score and save each question individually.

Visible Changes

Self-service Workbench: Visible change in the Talent Gateway user type privileges.

KRB: No visible changes without configuration.

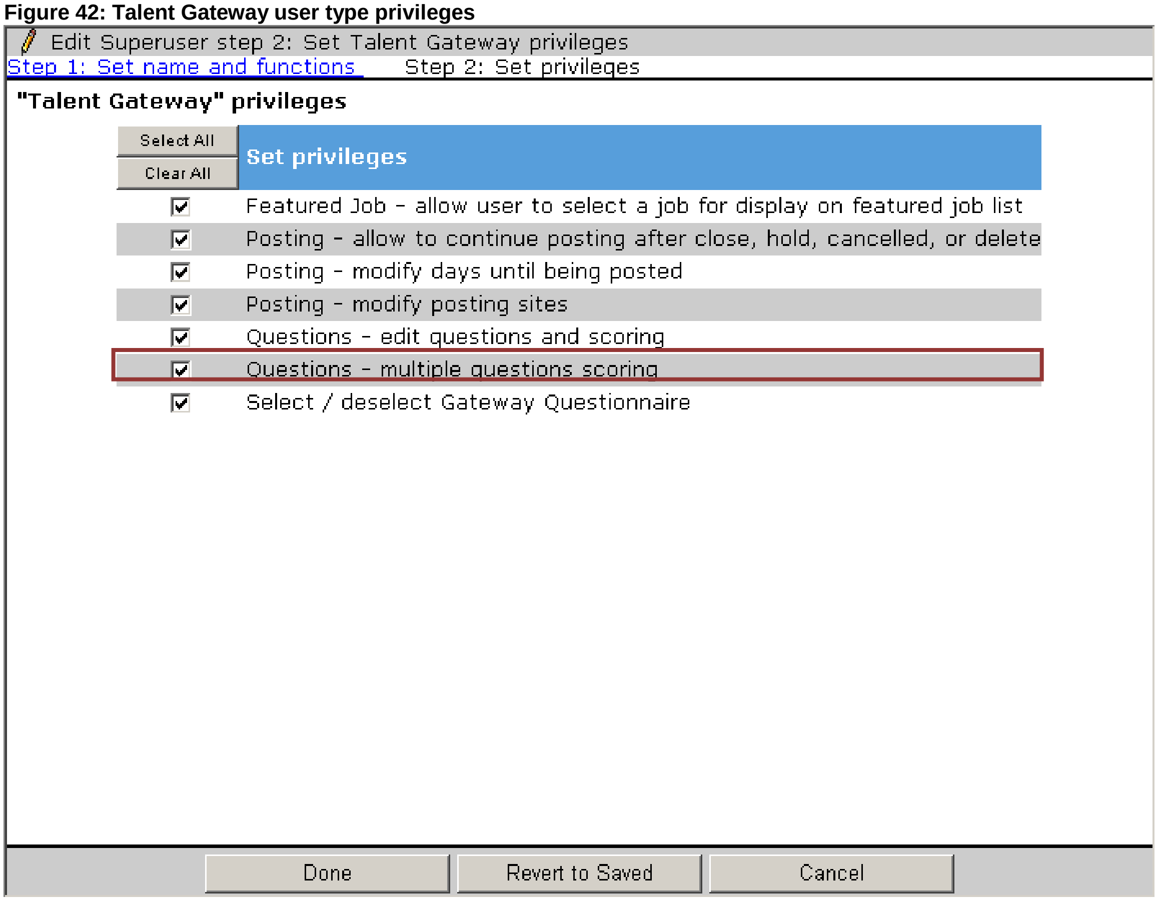
Configuration

In Workbench, enable the new Talent Gateway user type privilege **Questions – multiple question scoring** for the appropriate user type(s). It is unchecked by default.

Figure 41: Setting dependencies

Questions – edit questions and scoring	Questions – multiple questions scoring
OFF	OFF, disabled
ON	Enabled but OFF
ON	Enabled and ON

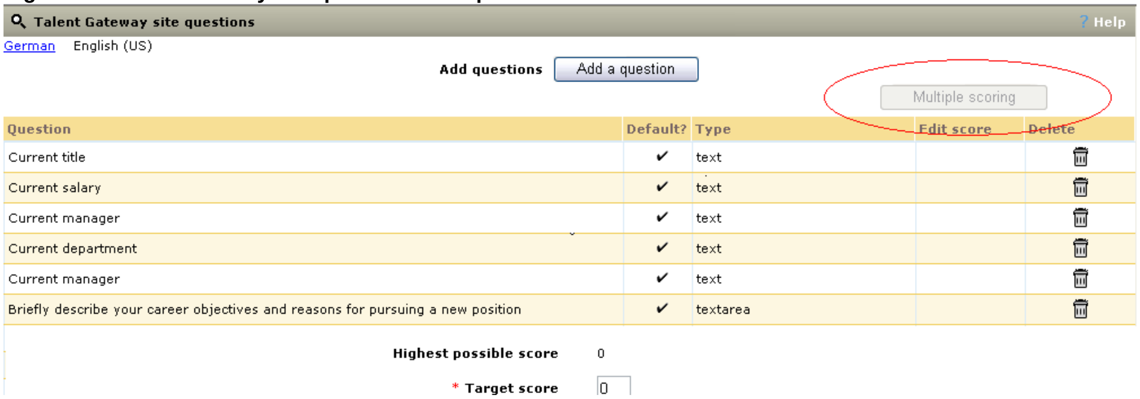
Figure 42: Talent Gateway user type privileges



User Experience

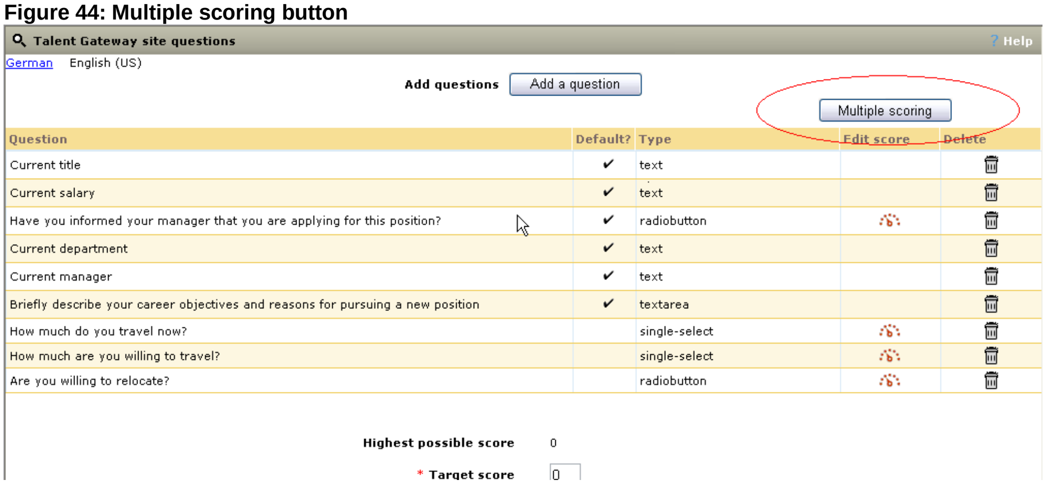
Once it is enabled through setting user type privileges, the **Multiple scoring** button displays for each separate language in which the requisition was created. If there are no “scorable” questions, the **Multiple scoring** button is disabled and grayed out, as shown in the screen capture below. For example, questions with the field type of text or text area cannot be scored.

Figure 43: Talent Gateway site questions - no questions to score



The **Multiple scoring** button is enabled when there are questions that need to be scored. When questions are scored in the **Multiple question scoring** window, the **Scored** icon displays for those questions on the **Talent Gateway site questions** page.

Figure 44: Multiple scoring button



You can see the **Multiple scoring** button on the **Talent Gateway site questions** page if you have the appropriate user type privileges.

Scoring Multiple Questions

To score multiple questions:

1. In KRB, navigate to the **Talent Gateway site questions** page.
2. Click the **Multiple question scoring** button above the list of questions.
3. The **Multiple question scoring** window opens.
4. For each question with a field type that has options for answers (for example, single select, radio button, and so forth), select the option that is the correct option and enter a score.
5. Select all other options and enter scores for them.
6. When you are finished scoring the question options, click **Save**.

Figure 45: Multiple questions scoring window before scores are set

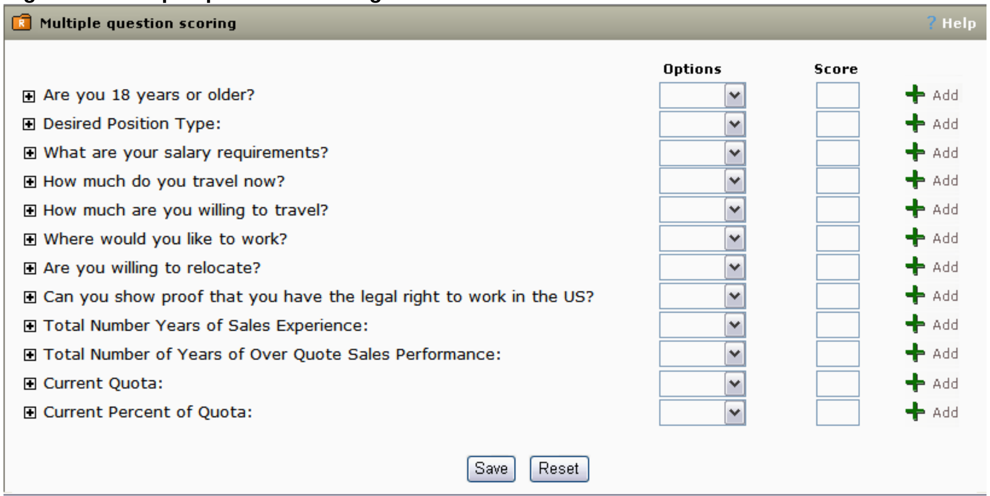


Figure 46: Selecting a Yes/No option for the first question

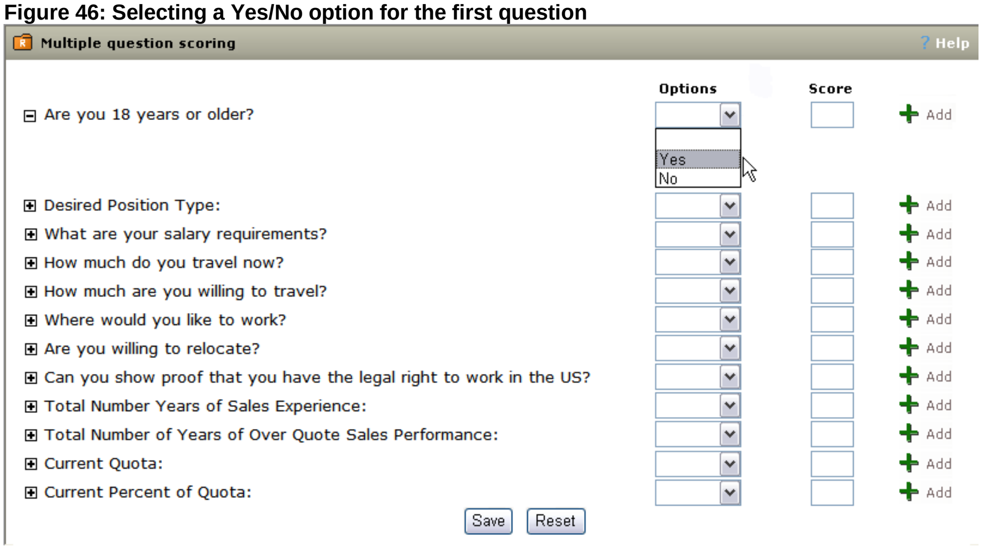
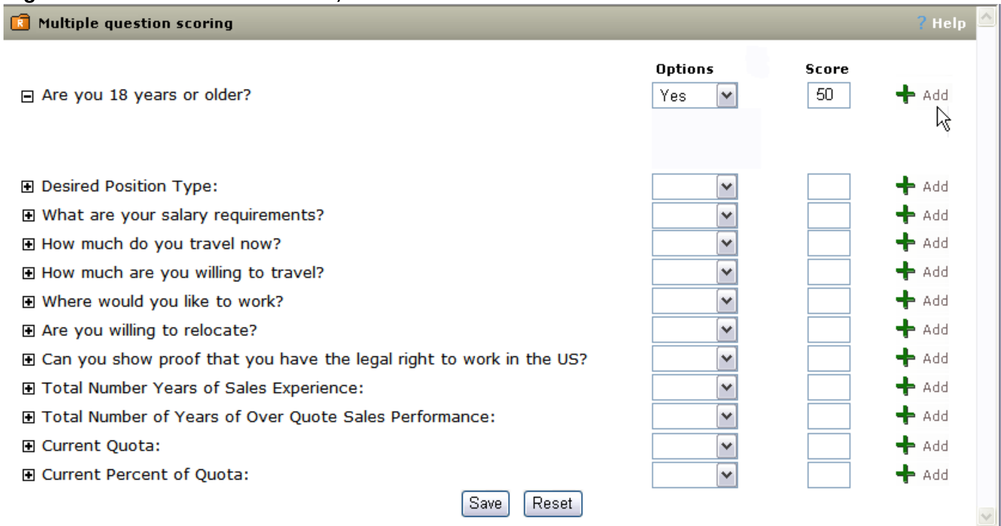


Figure 47: Enter a numeric score, and click Add+



Deleting a Score

To delete a score:

1. Click the associated trash can icon.
2. Click **Delete** in the confirmation window.

Proximity Search Enhancement

This enhancement affects Proximity Search. It will be implemented over several cycles and on a case-by-case basis.

- When a country does not use states, provinces, or regions in their addresses, the **Location** field will list “N/A” (Not Applicable).
- When a country does not use cities in their addresses, the **City** field will list “N/A.”

KRB users will start to see this for some locations and cities on the **Add req**/**Edit req** pages and on the candidate **Search** page. Candidates will start to see the analogous values on Talent Gateways for which Proximity Search is enabled. For example, in this build users and candidates will see the following:

- Several new values in the **Location** field for Trinidad and Tobago, and the **City** field displays “N/A.”
- “N/A” in the **Location** field for Puerto Rico, and the **City** field is a dropdown list of cities.

Date Available

This feature is available in R12.1 Build 3.

US: October 08, 2009

EU: October 14, 2009

Cost

No additional cost.

How Do I Get this Feature?

This feature is available automatically without configuration.

Benefits

Proximity search is more accurate and inclusive.

How It Worked Before

For proximity searches for certain countries, some of the fields were blank for **Location** or **City**. If users made these proximity fields required when setting up a req template and the values were missing, the req template couldn’t be completed.

Visible Changes

There are visible changes without configuration.

Scheduling Pages Exclude Closed Reqs

Closed requisitions are no longer listed in the **Folder/Status** and **Folder** fields on several pages in the Scheduling module. The dropdown list for those two fields lists all Requisition folders, Working folders, and Inboxes to which the candidate under consideration has applied.

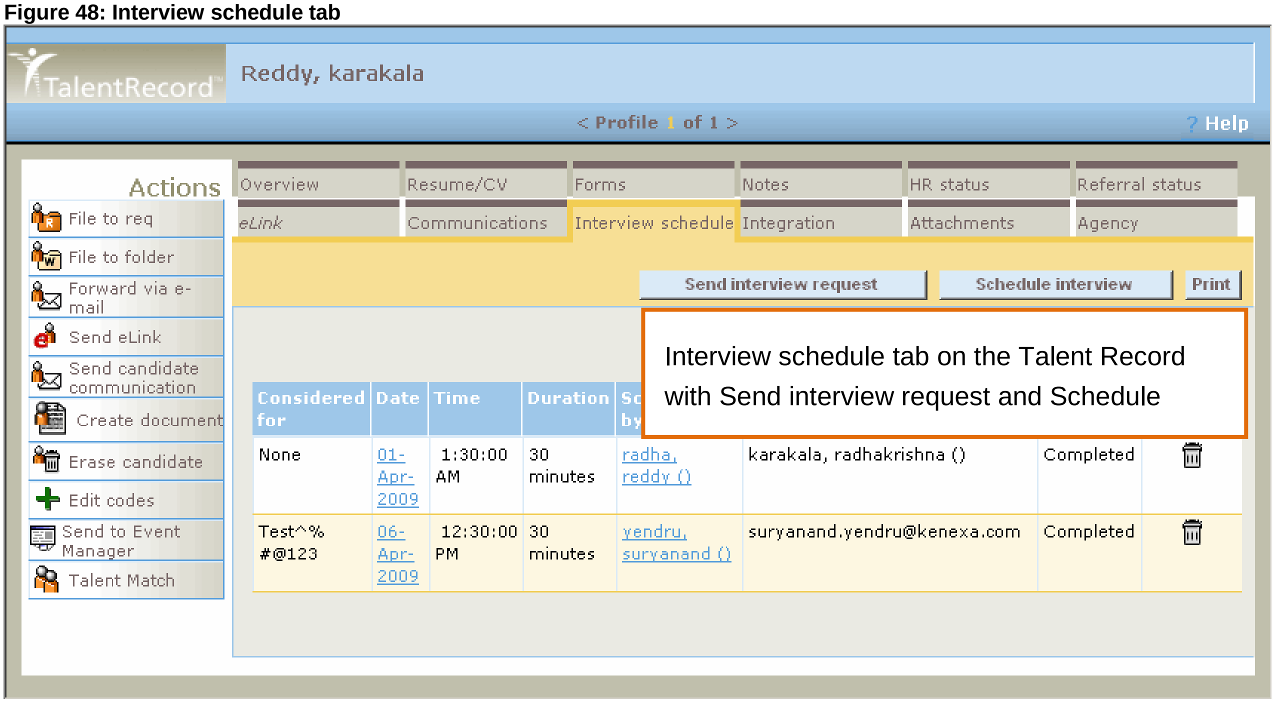
This enhancement affects the following pages in the Scheduling module:

- Send interview request (Folder/Status)
- Schedule interview (Folder/Status)
- My schedule (Folder)
- My requests (Folder)
- Master schedule (Folder)

To access this functionality:

1. From candidate Search results, or from within a Req folder, click the candidate's name link to open the candidate's Talent Record.
2. Select the **Interview Schedule** tab.

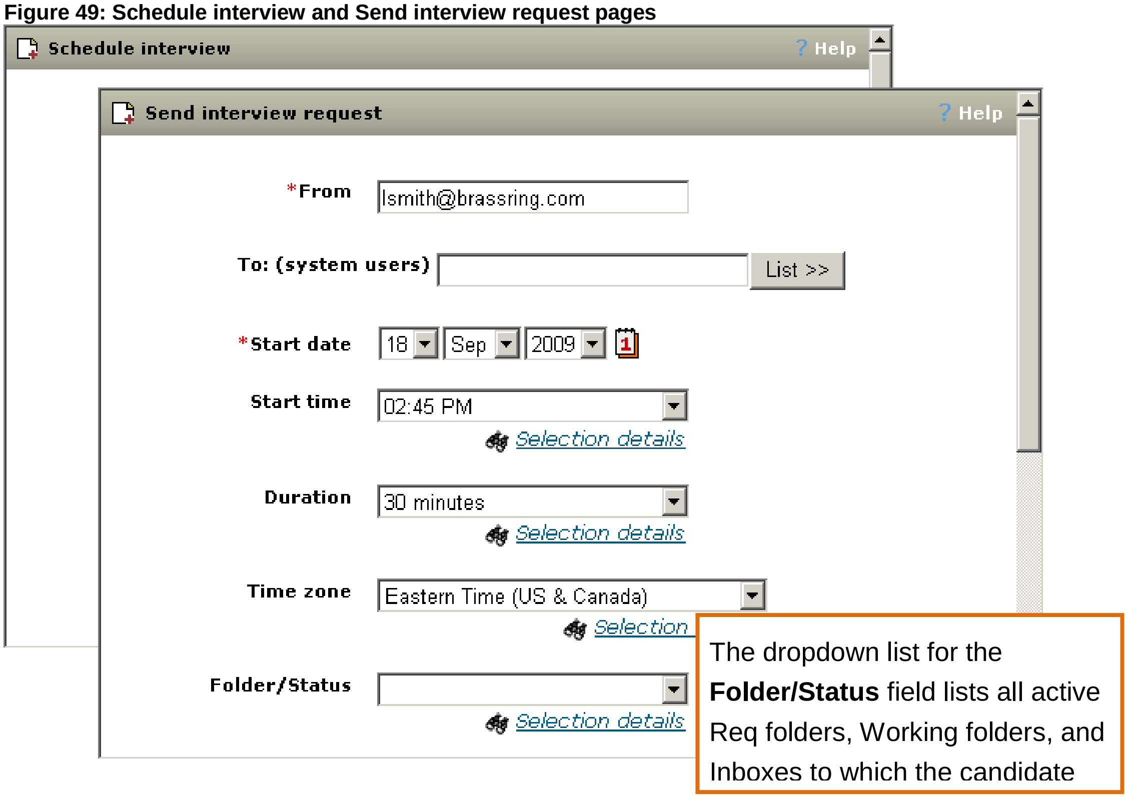
Figure 48: Interview schedule tab



3. Click **Send interview request** or **Schedule interview**. The **Send interview request** or **Schedule interview** page opens, as shown below.

On both pages, the dropdown list for the **Folder/Status** field lists all active Req folders, Working folders, and Inboxes to which the candidate has applied. The dropdown list does not include closed requisitions.

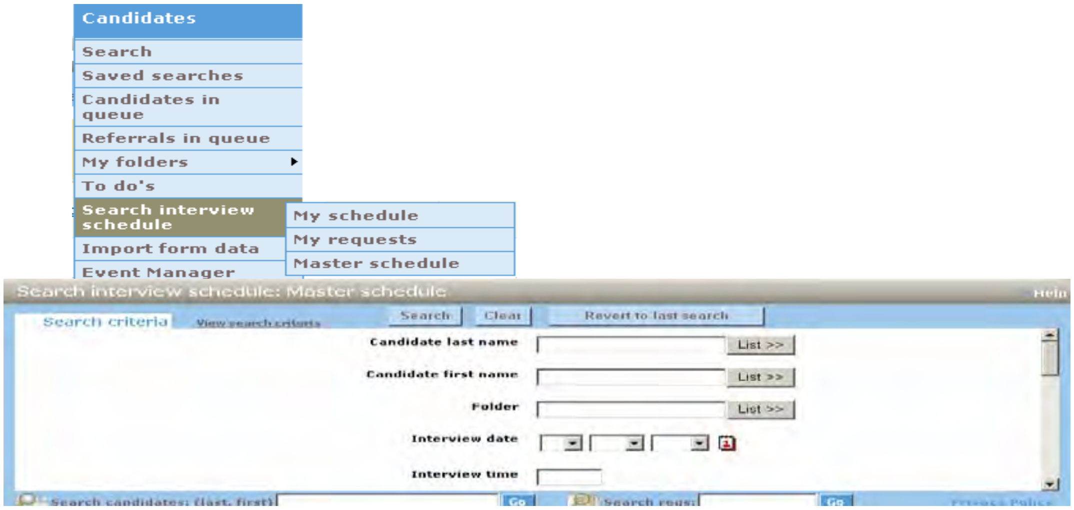
Figure 49: Schedule interview and Send interview request pages



To access the **My schedule**, **My requests**, and **Master schedule** pages: Select **Candidates > Search interview schedule > My schedule | My requests | Master schedule**.

On the **My schedule**, **My requests**, and **Master schedule** pages, the dropdown list for the **Folder** field lists all the active requisitions, Working folders, and Inboxes to which the searched-for candidate has applied. The screen capture displays a partial view of the **Master schedule** page.

Figure 50: Search interview schedule menu



Date Available

This feature is available in R12.1 Build 3.

US: October 08, 2009

EU: October 14, 2009

Cost

No additional cost.

How Do I Get this Feature?

This feature is available automatically without configuration.

Benefits

KRB users will have a smaller set of req folders to filter.

How It Worked Before

The Folder/status dropdown list, from which KRB users select a requisition for scheduling, included closed requisitions.

Visible Changes

There is a visible change in KRB as a result of this enhancement.

Auto-Redirection to KMS Onboarding

As of this release, KRB can redirect and authenticate users from KRB to KMS Onboarding when the user performs an update to a specified HR status. KMS Onboarding users can still access the application through the Candidates menu as well. Note: If the export fails, the user is not redirected to Onboarding and an error message displays.

Date Available

This feature is available for use in R12.2 Build 0.

US: November 19, 2009

EU: November 25, 2009

Cost

There is no additional cost for using this feature if your organization already uses KMS Onboarding and and the Candidate Export integration. There are separate costs to implement KMS Onboarding and Candidate Export integration.

How Do I Get this Feature?

Please contact your Kenexa consultant for assistance with this feature.

Benefits

This eases the user experience, thus making them more efficient. The intent of this project is to ease the user experience by automatically redirecting and authenticating them into KMS Onboarding upon an HR Status update.

How It Worked Before

Users accessed KMS Onboarding from the KRB **Candidates** menu.

Visible Changes

There are no visible changes for this feature.

Configuration

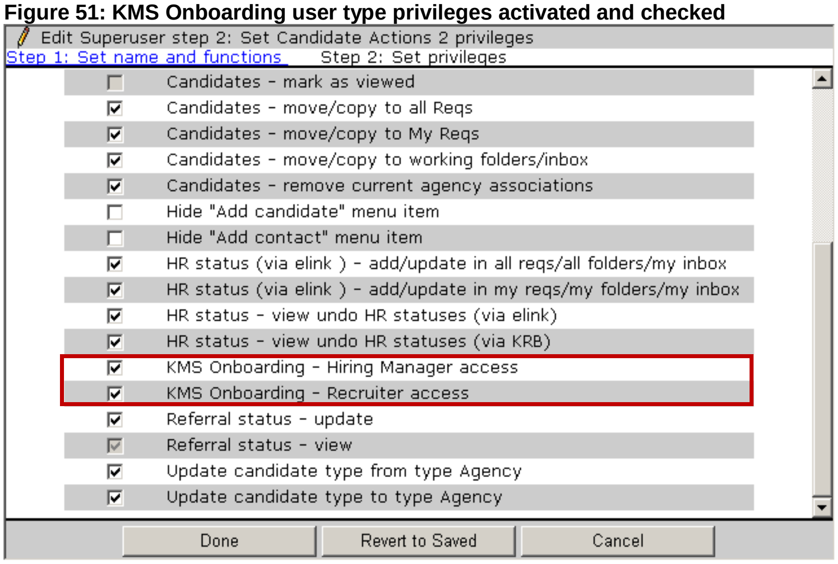
Your Kenexa consultant takes care of initial enablement. After that your Certified Workbench User can configure the two Candidate Actions 2 user type privileges:

- KMS Onboarding – Hiring Manager action
- KMS Onboarding – Recruiter action

As a result of enabling the KMS client setting, two **Candidate Actions 2** user privileges for Onboarding are activated:

- KMS Onboarding – Hiring Manager action
- KMS Onboarding – Recruiter action

Figure 51: KMS Onboarding user type privileges activated and checked



The **Onboarding** menu item displays in the Candidates menu (**KRB > Candidates**) for users who have one of the user type privileges noted above.

New HR Status Attribute for Onboarding Auto-Launch

There is a new **HR Status attributes** that becomes active once KMS Onboarding is turned on: **Applicant Selected, Proceed to Onboarding**. Your Kenexa consultant configures this attribute in Workbench.

User Experience

When the **Applicant Selected, Proceed to Onboarding** is enabled (as described in the previous section) for an HR status, and the KRB user updates to that status, the following sequence of events happens:

If no additional actions are required with this HR status update (for example, candidate export, forms pop-up, or auto-req close), when the user clicks **Update**, he or she is redirected with authentication to KMS Onboarding in a separate window.

When additional actions *are* required with the HR status update, the system:

1. Checks to ensure the form required for this HR status is on file (if it is not, the HR status update is blocked).
2. Updates the candidate's HR status.
3. Runs the candidate export. **Note:** When a candidate export is required, users can update only one candidate at a time.
4. Displays a success message in a separate window. **Note:** If the candidate export fails, no auto-launch occurs and the system displays an error message.
5. Redirects the user to and auto-launches KMS in a separate window. The user is simultaneously authenticated.

6. Pops up the form required for this HR status update in the KRB window.
7. Automatically closes the requisition (Auto-req close setting).
8. Starts the process again with next candidate if multiple candidates are selected. The KMS window stays open.

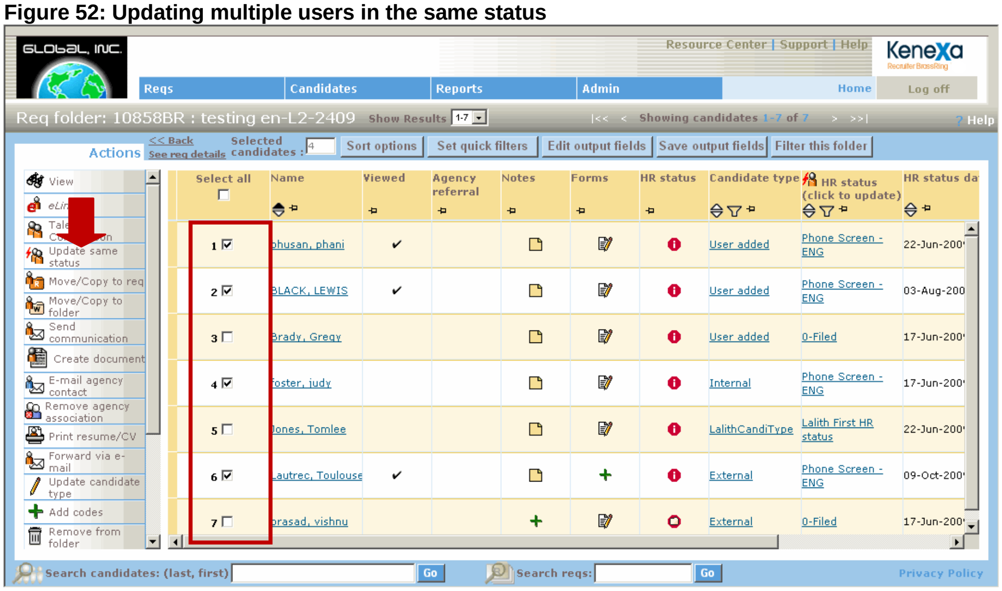
If no candidate export is required with the HR status but additional actions are required:

1. KRB users can update multiple candidates simultaneously.
2. KMS Onboarding launches automatically in another window once only, regardless of the number of candidates selected.

Example

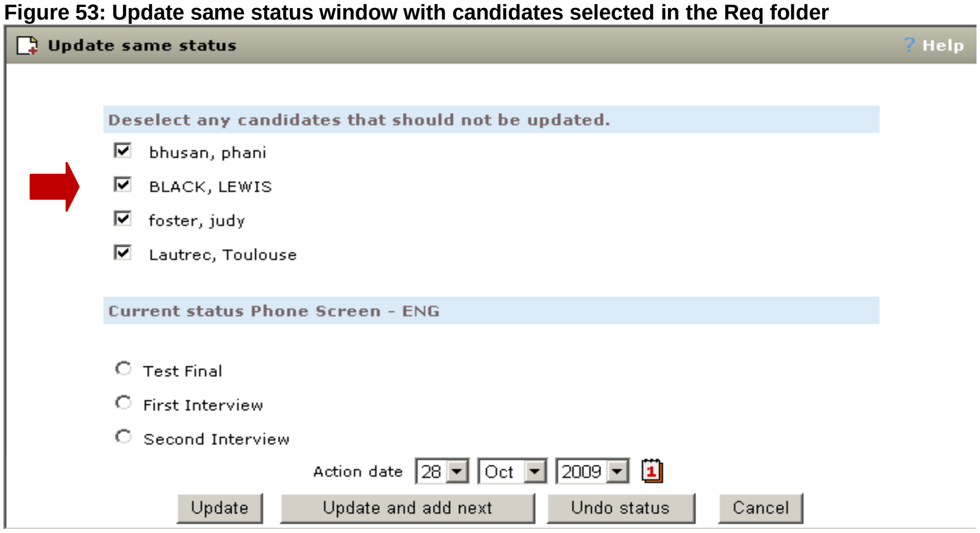
You can update a single or multiple users. In the example below, four candidates within the Req folder are selected. To update them simultaneously, click **Update same status** in the **Actions** menu.

Figure 52: Updating multiple users in the same status



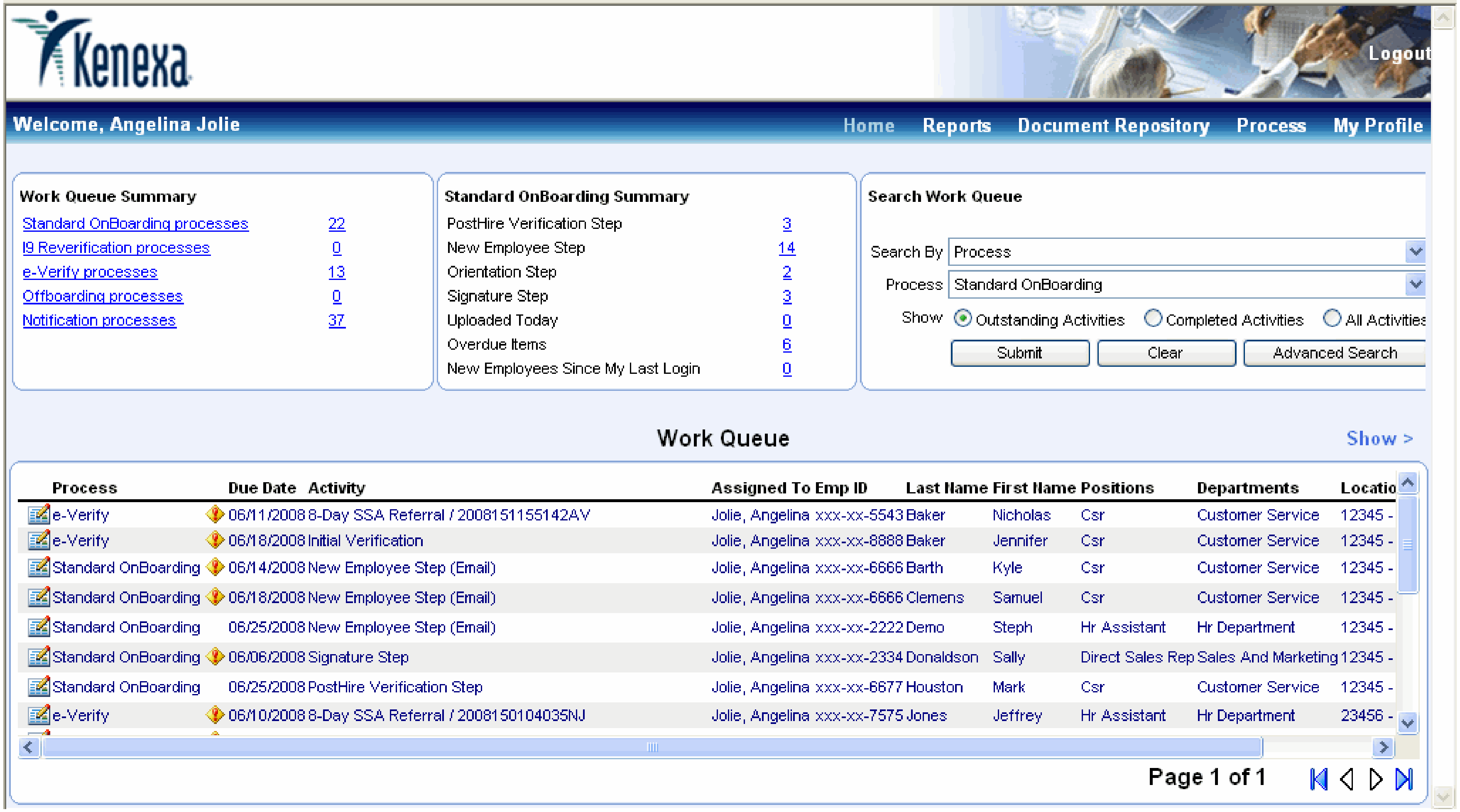
The **Update same status** window opens.

Figure 53: Update same status window with candidates selected in the Req folder



When you click **Update**, you are redirected to KMS Onboarding through a pop-up window. Your logon credentials are authenticated at the same time:

Figure 54: User is already authenticated in KMS Onboarding



Configurable Margins of Document Templates

KRB users who have privileges to add and edit Document Templates within KRB can set margins on your organization's document templates. The margin values are used when creating the PDF document that is produced from a KRB document template.

Date Available

This feature is available for use in R12.2 Build 0.

US: November 19, 2009

EU: November 25, 2009

Cost

No additional cost.

How Do I Get this Feature?

Your KRB Administrator or Communications Module template creators can configure this feature for document templates in KRB.

Benefits

Your organization has more flexibility to specify the size of documents created within KRB.

How It Worked Before

Document template margins were 1" by default and could not be changed.

Visible Changes

KRB users who add and edit document templates will see the new settings on document templates.

Limitations and Known Issues

This project lets your users set the margins for any document created using a KRB document template. You cannot set default values across all document templates.

Configuration

This feature is configured in KRB in the Communications Module. In KRB, select **Admin > Admin+ > Communications > Add document template | Edit document template**. You must have add/edit privileges.

User Experience

If you have privileges to create or edit document templates, you can select vales for the left, right, top, and bottom margins. The default margin is 1". The options for each margin are 0.5, 1.0, and 1.5".

Figure 55: Document Template – Add mode; default setting for margins

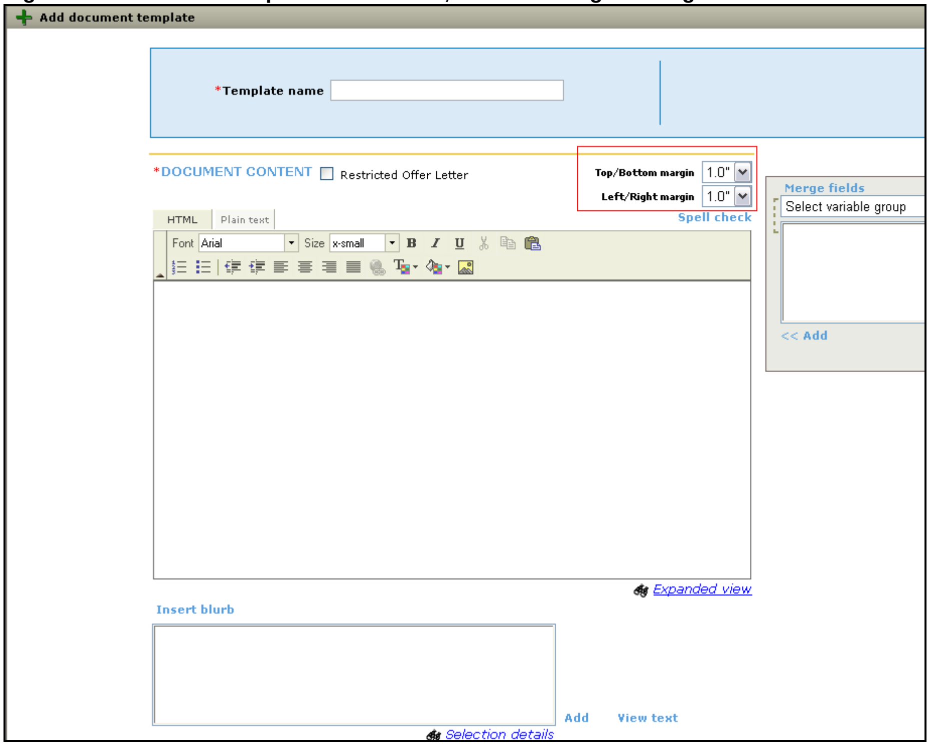
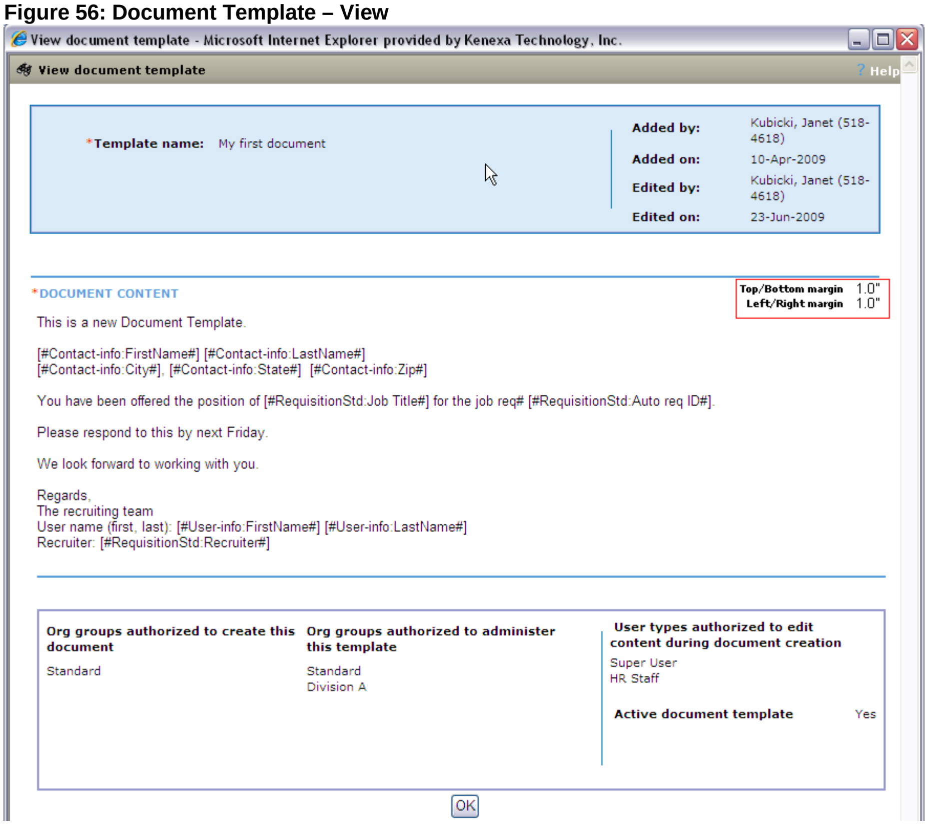


Figure 56: Document Template – View



Candidate Forms

Providing Candidates with Question Responses

The purpose of this enhancement is to provide candidates with the question responses they gave during the submission process.

Your organization can include the field labels and responses of questions and forms completed on the Talent Gateway during the application process in the response notification e-mail that is sent to the candidate.

To accomplish this, you must place the [QuestionResponses] token in the **Talent Gateway Submit resume/CV e-mail confirmation message** for Full Talent Gateways or in the **Confirmation e-mail text message** for Basic Talent Gateways.

When the token is present in the Full Talent Gateway's **Submit resume/CV e-mail confirmation message**, the Talent Gateway inserts the field labels and question responses of the Talent Gateway questions and/or the Gateway Questionnaire questions answered during that specific job application process.

When the token is present in the **Basic Talent Gateway Confirmation e-mail text message**, the Talent Gateway inserts the field labels and question responses to default questions, and the additional information included in the attached form responses answered during that specific job application process.

In both cases, if a question does not have a response, the field label does not display in the e-mail.

If you use the **[**QuestionResponses] token in any other text customization field, it is not merged and the literal token text ("[QuestionResponses]") displays in the field.

Business Rules

Only questions and responses stored on candidate forms are merged into the e-mail text through the [QuestionResponses] token (for both GQ and non-GQ flows).

- No profile, resume, or cover letter information is merged through the [QuestionResponses] token.
- Scores that would normally show on the Job Response and/or GQ Response form are not included in the data merged into the e-mail text through the [QuestionResponses] token.
- Data merged in the e-mail message via the [QuestionResponse] token is in the Talent Gateway locale language used by the candidate. All question labels, select type responses, and section titles display in the site language.
- Data populating encrypted fields are not displayed in the e-mail. The question label appears, but the question response is displayed as five asterisks: *****.
- Any date field responses are merged as dd-mmm-YYYY (for example, 02-Sep-2009).

Date Available

This feature is available for use in R12.1 Build 4.

US: October 29, 2009

EU: November 4, 2009

Cost

No additional cost.

How Do I Get this Feature?

Your Kenexa consultant or Certified Workbench User can add the token to the appropriate text customization messages for your organization's Talent Gateways.

Benefits

Candidates will have a record of the responses they gave for questions during the submission process.

How It Worked Before

If you do not add the token, you cannot automatically send candidates non-editable versions of their forms.

Visible Changes

There are no visible changes associated with this feature.

Limitations and Known Issues

This text customization capability does not apply to the following:

- No profile, resume, or cover letter information is merged through the [QuestionResponses] token.
- General submissions (also called "jobless applies," and "Submit now" applications) for any type of talent gateway because the e-mail message is not customizable in Workbench.
- Agency Managers
- Employee Referral Gateways
- Submissions by candidate as a result of an employee referral (even if the candidate is directed to another talent gateway because candidates do not receive e-mail notification of submission).

Best Practice Recommendations

If one of your candidate form fields is encrypted, any encrypted field is populated with the value of ***** if it is sent back to a candidate in an e-mail. Your organization might want to include custom text to explain the five asterisks (*****).

Configuration

To add the token to the notification message:

1. In Workbench, select **Tools > Talent Gateways > Text customization**.
2. On the **Talent Gateway text customization** page, select the Talent Gateway you want to edit and click its pencil icon.
3. The **Customization** page for the gateway opens.
4. Click the **Notifications** tab.

Full Talent Gateways

Figure 78 below shows the default text in the **Submit resume/CV e-mail confirmation message** field.

Figure 57: Talent Gateway Text customizations – no token

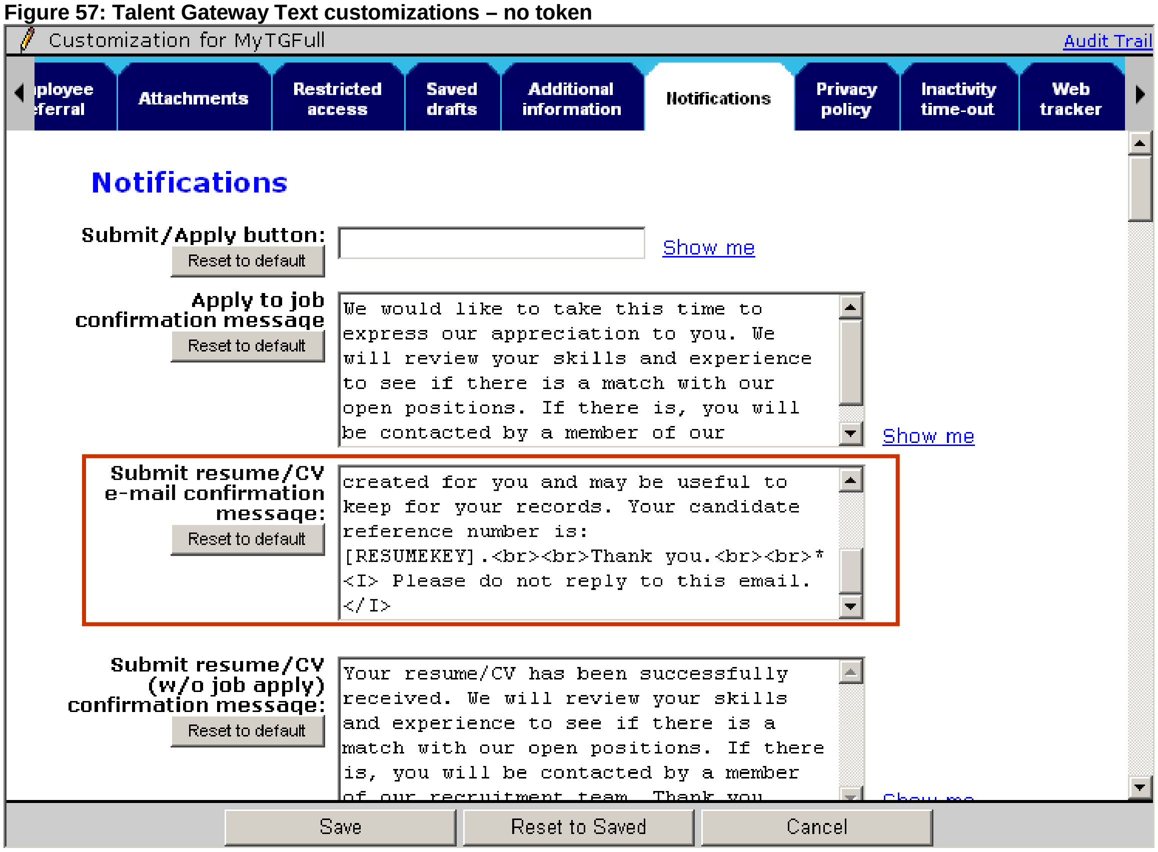
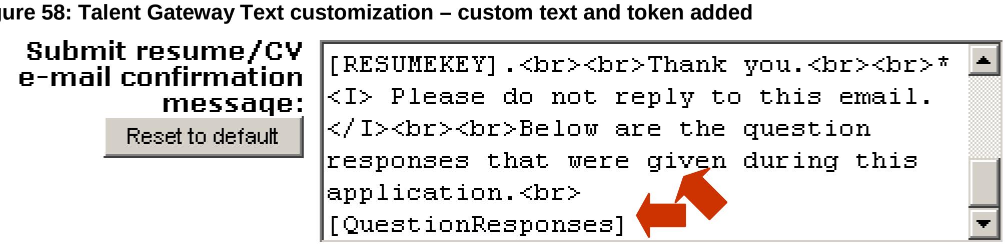


Figure 79 shows the customized field with the [QuestionResponses] token in the **Submit resume/CV e-mail confirmation message** field.

Figure 58: Talent Gateway Text customization – custom text and token added



Basic Talent Gateways

Figure 80 shows the customized field with the default text and no [QuestionResponses] token in the **Confirmation e-mail text** field.

Figure 59: BTG – Confirmation email text (default, with no token)

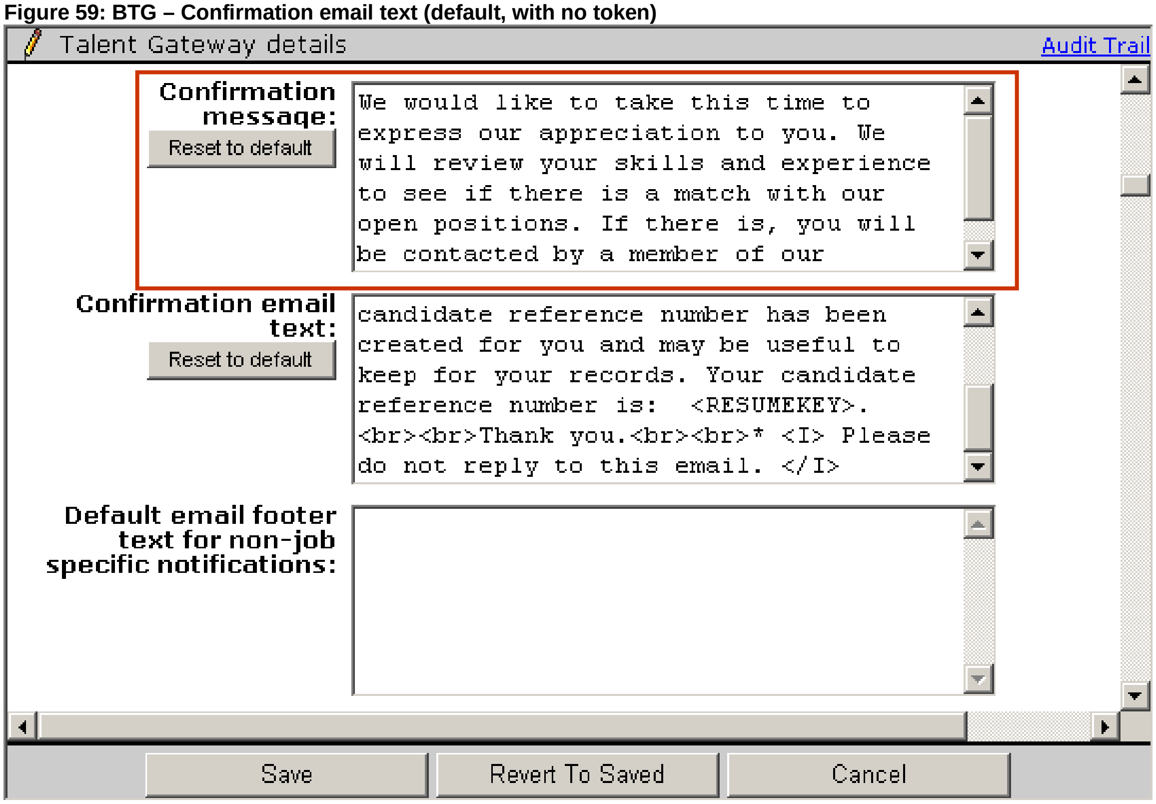
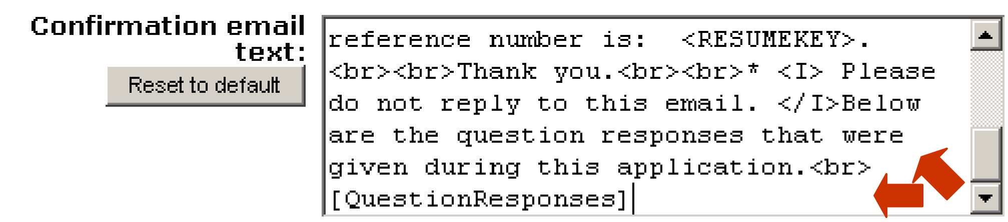


Figure 81 shows the customized field with the [QuestionResponses] token in the **Confirmation e-mail text** field.

Figure 60: BTG – Confirmation email text with token



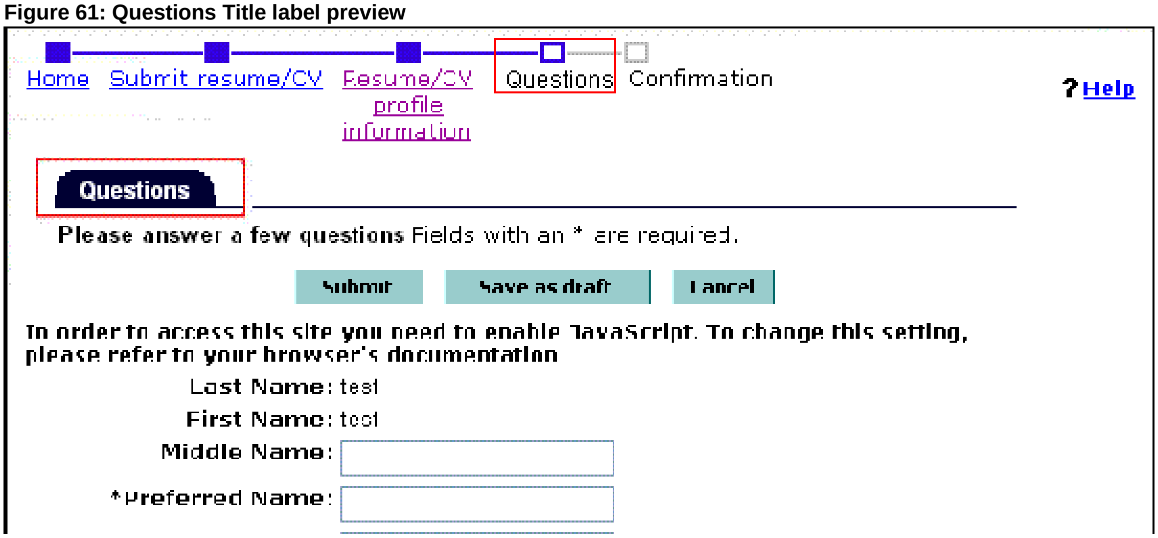
User Experience

Token Formatting - Non-GQ Flow (Job Response Workflow)

In the Non-GQ flow, the default or customized title displays on the tab and in the progress bar. (Organizations can customize the “Questions” title in Workbench by selecting **Tools > Talent Gateways > Text customization > Edit > Titles** tab > **Question Titles** setting.)

- The “Questions” label displays even if the candidate did not answer any job specific or Talent Gateway default questions.
- If a custom label was configured for Question title, the label is displayed in the language of the candidate submission.
- If there is no value set for Question title in Workbench, then the default value for the site language is used.

Figure 61: Questions Title label preview



Listing Jobs and Question Responses

Job titles are listed in alphabetical order.

The questions and responses for each job are grouped together under each job title.

If the same question is asked for multiple jobs, the question and response displays separately under each job title.

Job Specific Questions and Responses

When Job Specific Questions have been added to a GQ using a JSQ widget, questions are displayed in the same order as they appear on the Talent Gateway.

Question Labels

Question labels display in **bold text** in the left column of the table.

Note: If your organization uses HTML in the field label, both the bold formatting of the cell and the rendered HTML are displayed. Clients should take special care to test the label output in a test e-mail in the Staging environment.

Responses to Multi-Select and Checkbox Fields

Responses to multi-select or checkbox fields are displayed in the order in which they appeared on the Talent Gateway. Multiple values are separated by a line break.

Additional Information Section
Questions and responses display in the Attached TG Forms Questions and Responses area. If your organization uses HTML in the field label, both the bold formatting of the cell and the rendered HTML are displayed. Clients should take special care to test the label output in a test e-mail in the Staging environment.

Question Responses
Field responses are in plain text.

Multiple responses to multi-select or checkbox fields are displayed in the order in which they appeared on the Talent Gateway.

For field responses that present options to candidates (single-select, multi-select, checkbox, and radio button), field responses are option descriptions, not option codes.

For query select question types, the system saves and displays the option code.

Forms are ordered in the way that they appeared on the Talent Gateway OR forms are ordered alphabetically by database form name.

Form fields are ordered numerically by field placement.

Token Formatting - GQ flow

Job Specific Questions (JSQ Widget) Job title
Questions and responses for each Job specific question are grouped together under “<Jobtitle>”. If the same question was asked for multiple jobs, the question/response displays separately under each “<Jobtitle>” section.

The <Jobtitles> sections is ordered alphabetically by Job Title.
Questions are in the same order as they appear on the Gateway Questionnaire.

Question Labels
If the field label contains HTML the bold formatting of the cell and label HTML will be outputted. The results may be sometimes unexpected. Clients should take special care to test the label output in a staging test e-mail.

Question Labels
Question labels display in **bold text** in the left column of the table.
“<Section name>”
Questions are grouped by the GQ Section that they appeared on.

Sections are ordered by their placement on the GQ.

Note: If your organization uses HTML in the field label, both the bold formatting of the cell and the rendered HTML are displayed. Clients should take special care to test the label output in a test e-mail in the Staging environment.

Question Responses
Field responses are in plain text.

Field responses are option descriptions (not option codes) in the case of single-select, multi-select, checkbox, and radio button field types.

Field responses for query select fields are the saved value (option code).

Multiple responses to multi-select or checkbox fields are displayed in the order in which they appeared on the Talent Gateway, separated by a line break.

Questions are displayed in the same order as on the GQ from which they are taken.

If questions are formatted in multiple columns on the GQ, the fields display in a single column on the e-mail ordered from left to right.

Grid type of questions are displayed as follows: <x label>,<y label>. For example, a grid completed as shown here:

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
6 - 3				X		X	
11 - 8	X		X				
5 - 12		X					

Would display in the e-mail as follows:
Would display in the email like this:
Sun,11 – 8
Mon, 5 – 12
Tues, 11 – 8
Wed, 6 – 3
Fri, 6 - 3

E-mail Confirmation Messages

Figure 62: E-mail confirmation with no token

From: TS-JBK [donotreply@staging.brassring.com] Sent: Tue 9/15/2009 9:39 AM
To: Kubicki, Janet
Cc:
Subject: Your candidate reference number - TS-JBK.

Thank you, Dana Testcase, for expressing interest in our organization.

We have successfully received your submission to the following position(s):

Housekeeper 4BR

A system-generated candidate reference number has been created for you and may be useful to keep for your records. Your candidate reference number is: 650184.

Thank you.

** Please do not reply to this email.*

Figure 63: Talent Gateway flow e-mail confirmation with token added

From: TS-JBK [donotreply@staging.brassring.com] Sent: Tue 9/15/2009 9:39
To: Kubicki, Janet
Cc:
Subject: Your candidate reference number - TS-JBK.

Thank you, Dana Testcase, for expressing interest in our organization.

We have successfully received your submission to the following position(s):

Systems Analyst 516BR
Business Analyst 572BR
Programmer I 520BR

A system-generated candidate reference number has been created for you and may be useful to keep for your records. Your candidate reference number is: 650184.

Thank you.

** Please do not reply to this email.*

Below are the question responses that were given during this application.

Label inserted from token

Questions	
Systems Analyst	
What are your salary requirements?	$35,000 - $40,000
How much do you travel now?	Less than 10 %
How much are you willing to travel?	Yes
Are you willing to relocate?	No
Can you show proof that you have the legal right to work in the US?	Yes
Date available to begin working	09-30-2009
Describe your ideal job	To combine my business knowledge and technical skills to projects that benefit organizations.
How did you hear about us	Internet – Job Board
Business Analyst	
What are your salary requirements?	$35,000 - $40,000
How much do you travel now?	Less than 10 %
How much are you willing to travel?	Yes
Are you willing to relocate?	No
Can you show proof that you have the legal right to work in the US?	Yes
Date available to begin working	09-30-2009
Describe your ideal job	To combine my business knowledge and technical skills to projects that benefit organizations.
How did you hear about us	Internet – Job Board
Programmer I	
What are your salary requirements?	$35,000 - $40,000
How much do you travel now?	Less than 10 %
How much are you willing to travel?	Yes
Are you willing to relocate?	No
Can you show proof that you have the legal right to work in the US?	Yes
Date available to begin working	09-30-2009
Describe your ideal job	To combine my business knowledge and technical skills to projects that benefit organizations.
How did you hear about us	Internet – Job Board
Additional information	
Race	I choose not to identify
Gender	I choose not to identify

Default AND Job specific questions grouped by Job title, ordered alphabetically by Job title

Label inserted from token

Question responses from attached TG forms

Figure 64: Gateway Questionnaire e-mail response configured with token (AFTER)

From: TS-JBK [donotreply@staging.brassring.com] Sent: Tue 9/15/2009 9:3
To: Kubicki, Janet
Cc:
Subject: Your candidate reference number - TS-JBK.

Thank you, Dana Testcase, for expressing interest in our organization.

We have successfully received your submission to the following position(s):

Systems Analyst 516BR
Business Analyst 572BR
Programmer I 520BR

A system-generated candidate reference number has been created for you and may be useful to keep for your records. Your candidate reference number is: 650184.

Thank you.

* *Please do not reply to this email.*

Below are the question responses that were given during this application.

token starts here

Label inserted from token

Question responses from Job Specific Questions widget. Ordered alphabetically by job title.

example of grid question and response

GQ question responses, ordered by Section and how appear in GQ

Questions:	
Job title 1	
How many years of project management experience do you have?	8
Years of DBA / SQL experience	7
How much structure do you prefer in your workplace? (1=very structured)	5
Sometimes things don't work out according to schedule. Describe briefly how you would handle not being able to supply your customer with what they want	I promptly explain to the customer the situation of the delay, the factors involved and the new timeframe when what they want will be available.
Job title2	
Shift	Monday, First shift Tuesday, Second shift Thursday, Third shift
Remuneration Package :	
Please provide your current basic monthly salary:	4500 - 5000
Currency	Indian Rupee
Please indicate what would be your expected monthly basic salary	8000 - 8500
Currency	Indian Rupee
Additional question :	
How did you hear about this role(s)?	Association / Society
Please specify which association or society:	Certified Public Accountants Australia (CPA Australia)
Previous experience :	
Have you applied to our company before?	Yes
What role(s) did you apply to before?	Oncology Expert
Have you attended an interview with our company before?	Yes
What was the role(s) you were interviewed for?	recruiter
Have you declined an offer from our company before?	Yes
What was the role(s) you declined?	Drilling Engineer
What was the reason(s) for declining?	test
Standard questions	
Have you previously worked, or do you currently work, for our company as a contractor or consultant?	No
Have you ever been employed by our company, one of its subsidiaries or any entity related in any way to these companies?	No
Equal opportunity :	
Gender	Female
Ethnicity	Black Caribbean
Submit :	
I hereby certify that the information I have provided is true and complete to the best of my knowledge. I agree that false information or omissions may disqualify me from further consideration and may be justification for termination at a later date.	I agree

Send Candidate Forms in Edit Mode

With this enhancement, KRB users can eLink Talent Records or send an e-mail template with forms to be edited to the candidate as long as the form already exists. If no form exists, a new form is sent. This feature is available for use in e-mail communications completed manually, when eLinking the Talent Record, and through Automation Manager.

This feature affects **One per candidate** and **Single per candidate/req combination** form types. If either of the form types **Multiple per candidate** or **Multiple per candidate/req combination** is selected, the setting **Send existing form in edit mode** is disabled and cannot be selected, and KRB *always* sends a new form.

Sending the E-Mail Template Manually

KRB users can deselect a candidate and not send the communication.

Date Available

This feature is available for use in R12.1 Build 3.

US: October 8, 2009

EU: October 14, 2009

Cost

No additional cost.

How Do I Get this Feature?

Your Kenexa consultant or Certified Workbench User can configure One per candidate and Single per candidate/req forms to be sent for editing.

Benefits

KRB users can send forms that already exist to candidates for editing and updating.

How It Worked Before

Before this enhancement, when a KRB user tried to send a form (by eLink or e-mail) and the candidate had already completed that form, the KRB incorrectly displayed an error message to the user saying that the attached form could be completed only once per candidate.

Visible Changes

There is a visible change in Workbench associated with this feature. Please see the feature description for more information.

Limitations and Known Issues

Forms with Send existing form in edit mode = Yes and configured as a HR Status “Optional popup form” do not pop up the form in edit mode when a candidate is updated to that HR Status. The existing error message, “*This form has already been completed for this candidate for this req*.” is displayed to users in this scenario.

Migration Information

The new setting of **Send existing form in edit mode** is set to a value of **No** for all existing candidate forms, active and inactive. You must enable this attribute on candidate forms that you want to be editable in this way.

Workbench Configuration

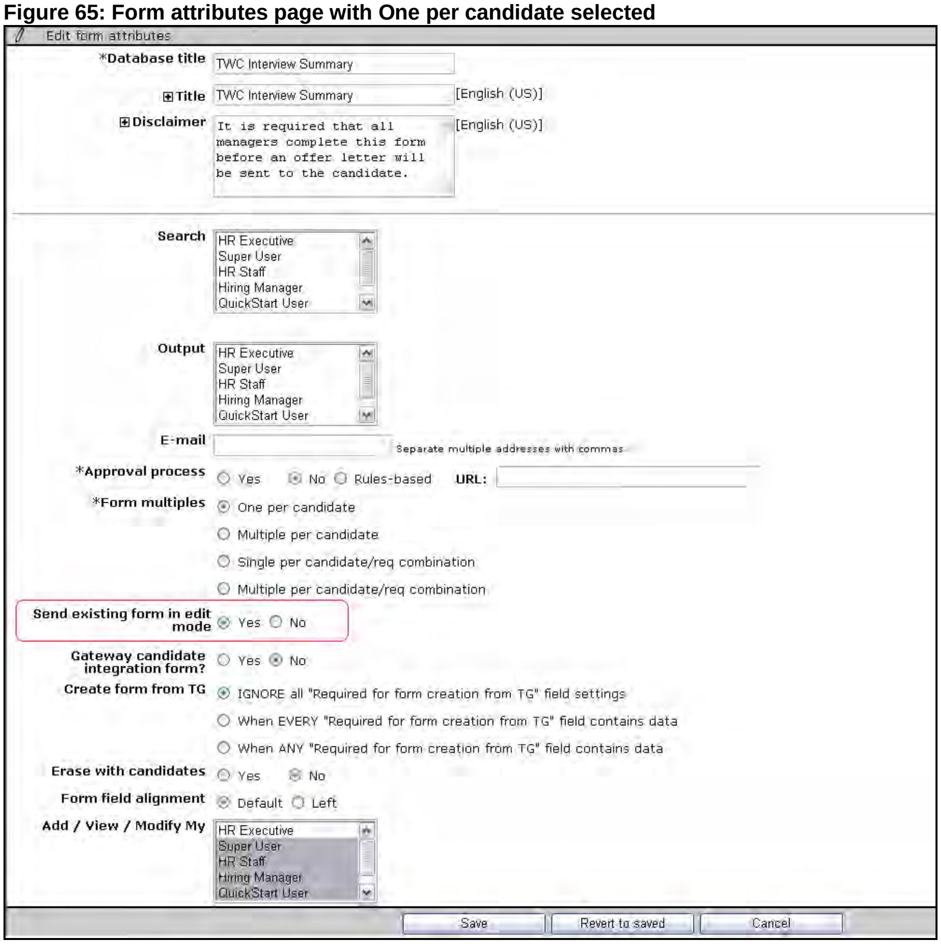
This feature affects **One per candidate** and **Single per candidate/req combination** form types.

If either of the form types **Multiple per candidate** or **Multiple per candidate/req combination** is selected, the setting **Send existing form in edit mode** is disabled and cannot be selected, and KRB *always* sends a new form.

To make a form eligible for sending in edit mode:

1. In Workbench, select **Tools > Forms > Candidate forms**. The **Candidate forms** page displays.
2. Click the pencil icon in the **Edit form attributes** column for a form that you want to make available for sending in edit mode. **Note:** You can make one per candidate and single per candidate/req combination forms eligible for sending in “edit” mode.
3. The **Edit form attributes** page opens for the selected form.
4. Enable the setting **Send existing form in edit** mode for this form. The default setting is **No**.
5. Click **Save**.
6. Repeat this procedure for each candidate form you want to be able to send in edit mode.

Figure 65: Form attributes page with One per candidate selected



User Experience

This section describes KRB user workflows for several scenarios.

(1) Send existing form in edit mode = No

You encounter the same workflow by clicking **Send communication** from a candidate grid or Talent Record. Assume that the following conditions are met:

> The candidate has already completed a One per candidate or Single per candidate / req form.
> AND
> The e-mail template is configured to send that form to be completed.
> BUT
> The setting **Send existing form in edit mode** is set to **No** for that candidate form.

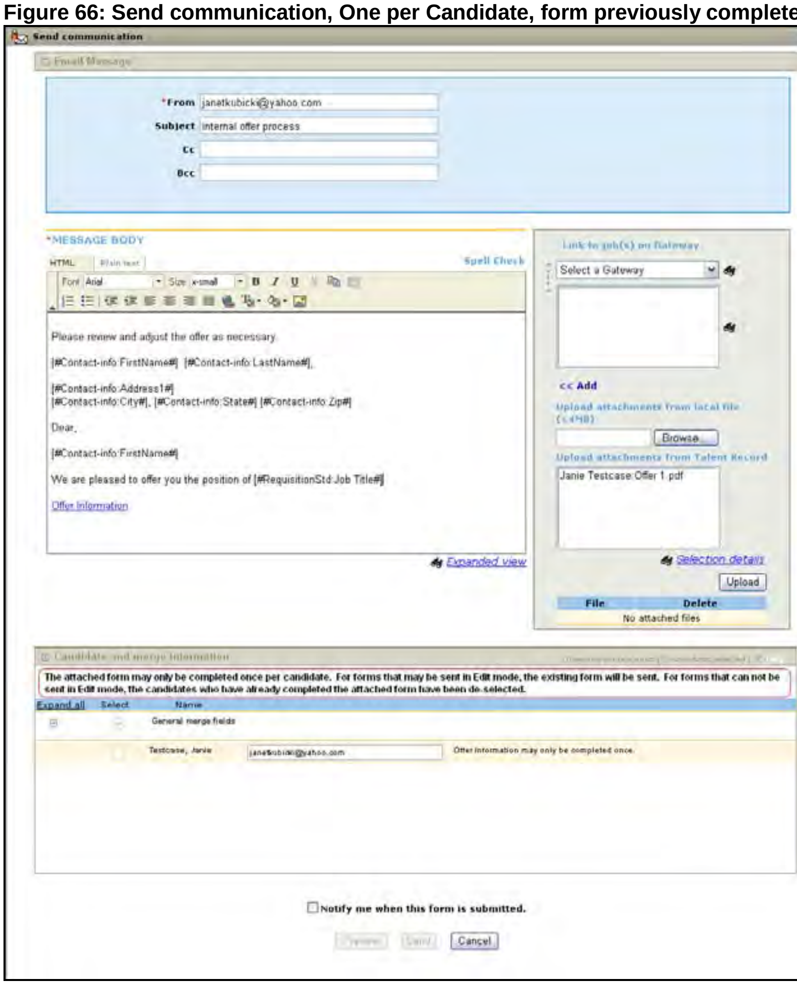
When a KRB user is sending an e-mail communication under the conditions listed above, KRB behaves in the same way as it did before this enhancement but displays an updated error message. The workflow is as follows:

3. Click **Send communication** for a specific candidate from a candidate grid or from the candidate's talent record.
4. Select the e-mail template.
5. The **Send communication** window opens.
6. On the **Send communication** page, you can change the e-mail before sending it.
7. The updated error message displays in the **Candidate and merge information** area (as shown in the figure below):

   "*The attached form may only be completed once per candidate. For forms that may be sent in Edit mode, the existing form will be sent. For forms that cannot be sent in Edit mode, the candidates who have already completed the attached form have been de-selected.*"

8. The **Select** check box for candidates name is checked or unchecked AND disabled.
9. When you click **Send**, the communication is not sent.

Figure 66: Send communication, One per Candidate, form previously completed



(2) Send existing form in edit mode = Yes and Approval Status = ""

You encounter the same workflow by clicking **Send communication** from a candidate grid or Talent Record. Assume that the following conditions are met:

The candidate has already completed a One per candidate or Single per candidate / req form.
AND
The e-mail template is configured to send that form to be completed.
AND
The setting **Send existing form in edit mode** is **Yes** for that candidate form.
AND
The **Approval status** is “”.

When a KRB user is sending an e-mail communication under the conditions listed above, the workflow is as follows:

1. Click **Send communication** for a specific candidate from a candidate grid or from the candidate’s talent record.
2. Select the e-mail template.
3. The **Send communication** window opens.
4. On the **Send communication** page, you can change the e-mail before sending it.
5. The updated error message displays in the **Candidate and merge information** area (as shown in the figure below):

   “*The attached form may only be completed once per candidate. For forms that may be sent in Edit mode, the existing form will be sent. For forms that cannot be sent in Edit mode, the candidates who have already completed the attached form have been de-selected.*”

6. In the candidate row:
   – An updated error message displays: *“<form name> may only be completed once. This form will be sent in edit mode*.”
   – The **Select** check box for each candidate’s name is checked and enabled. If you do not want to send the candidate communication, uncheck the check box.
7. Once you click **Send**, the Communications Module sends the form to any candidate whose name is still selected.

(3) Send existing form in edit mode = Yes; Approval status = Pending, Approved, Declined

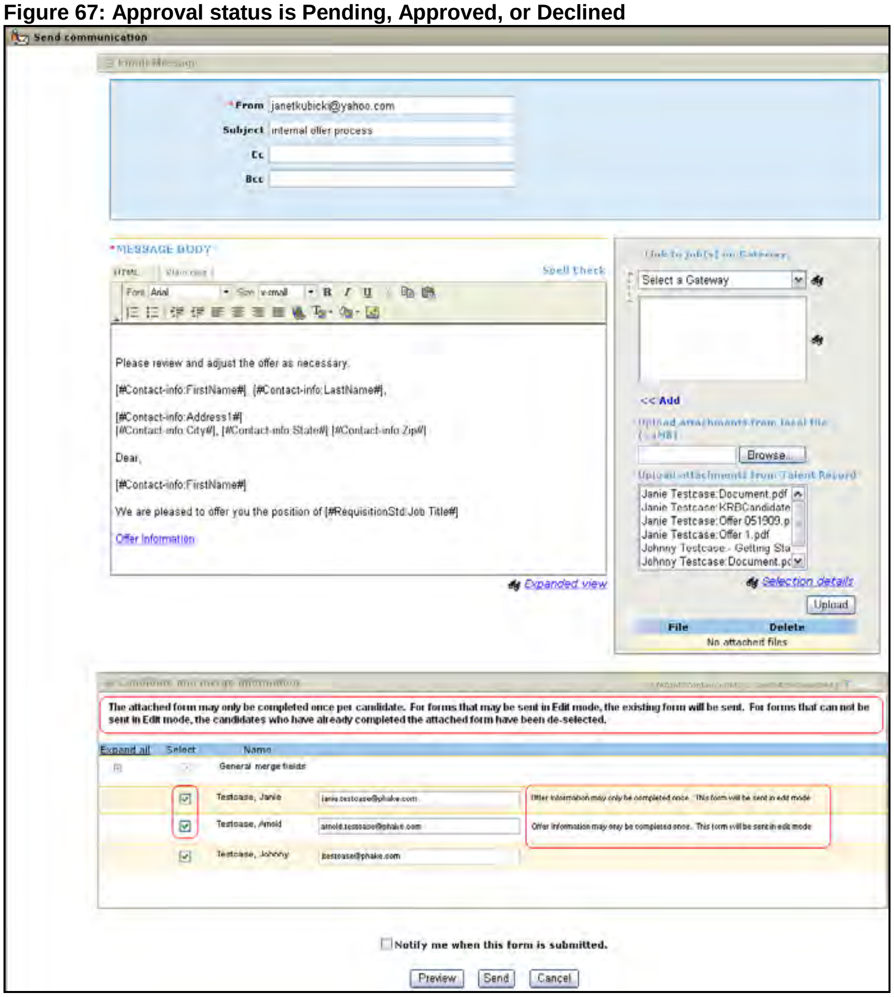
You encounter the same workflow by clicking **Send communication** from a candidate grid or Talent Record. Assume that the following conditions are met:

The candidate has already completed a One per candidate or Single per candidate / req form.
AND
The e-mail template is configured to send that form to be completed.
AND
The setting **Send existing form in edit mode** is **Yes** for that candidate form.
AND
The **Approval status** is **Pending**, **Approved**, or **Declined**.

When a KRB user is sending an e-mail communication under the conditions listed above, the workflow is as follows:

1. Click **Send communication** for a specific candidate from a candidate grid or from the candidate's talent record.
2. Select the e-mail template.
3. The **Send communication** window opens.
4. On the **Send communication** page, you can change the e-mail before sending it.
5. The updated error message displays in the **Candidate and merge information** area (as shown in the figure below): "*The attached form may only be completed once per candidate. For forms that may be sent in Edit mode, the existing form will be sent. For forms that cannot be sent in Edit mode, the candidates who have already completed the attached form have been de-selected.*"
6. In the candidate row:
    a. An updated error message displays: *"<form name> may only be completed once. This form will be sent in edit mode*."
    b. The **Select** check box for each candidate's name is checked and enabled. If you do not want to send the candidate communication, uncheck the check box.
7. Once you click **Send**, the Communications Module sends the form to any candidate whose name is still selected.

Figure 67: Approval status is Pending, Approved, or Declined



(4) Multiple Forms with Different Attribute Settings

In some cases, multiple forms with different form attribute settings are attached to an e-mail template.

If ANY forms completed for the candidate have the setting **Send existing form in edit mode** = **No**, the correspondence is NOT sent for that candidate.

In the **Candidate and merge information** section, the **Select** check box for the candidate is de-selected and grey.

Example

For example, an Offer Information form and Phone Screen form are both added to an e-mail template as forms to be completed. Both forms are Single per candidate / req combination. The Offer information form has **Send existing form in edit mode** set to **Yes**, but the Phone Screen form has the same setting set to **No**.

The candidate has both the Offer Information and the Phone Screen form already completed for the requisition from which the e-mail is being sent. Because the Phone Screen form has the "send in edit mode" setting set to **No**, the **Select** check box for the candidate is not selected and disabled.

(5) eLink Behavior when Send existing form in edit mode = No

eLinks behave as they did previously when the candidate has a One per candidate or Single per candidate / req form completed AND the e-mail template is configured to send that form to be completed AND **Send existing form in edit mode** is set to **No**.

Figure 68: eLink candidate form when Send existing form in edit mode = No

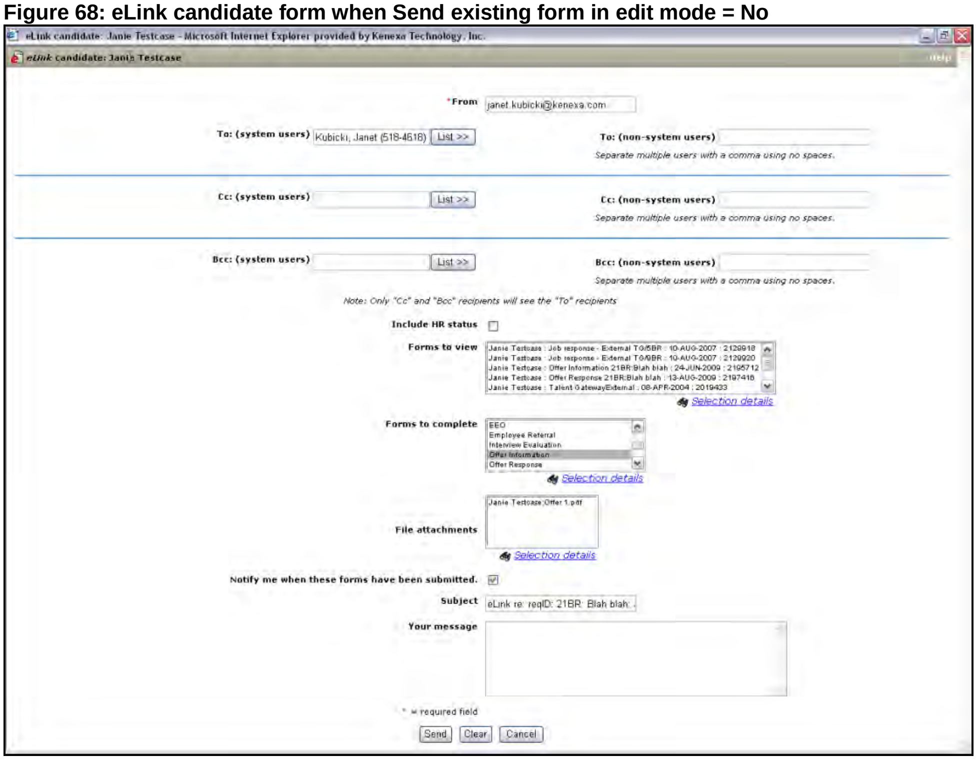


Figure 69: eLink notification

(6) eLink Behavior when Send existing form in edit mode = Yes

The eLink candidate confirmation message does not include One per candidate or Single per candidate / req combination forms that have been sent in edit mode in the message unless the form approval status is Pending, Approved, or Declined. If the approval status is any of those three, the communication is sent to the candidate.

(7) Automation Manager

In automation manager the e-mail communication template automatically sends the e-mail if the attached One per candidate or Single per candidate / req combination form attribute **Send existing form in edit mode** is set to **Yes**.

If there are ANY forms that has been completed for the candidate for which **Send existing form in edit mode** is set to **No**, the e-mail correspondence is not sent to that candidate.

Candidate Form Approval Notifications

Clients can elect to send notifications to system users and/or users selected in the req form once all approvals are secured. KRB users can select individuals who should be notified on the **Send for approval** page. The e-mail notification text is not customizable.

Date Available

This feature is available for use in R12.1 Build 3.

US: October 8, 2009

EU: October 14, 2009

Cost

No additional cost.

How Do I Get this Feature?

If your organization already uses one of the KRB approvals processes, your Kenexa consultant or Certified Workbench user can configure One per candidate and Single per candidate/req forms on an individual basis to be used in the candidate form approvals process.

Benefits

Your organization can ensure that selected users are informed when candidate forms are approved.

How It Worked Before

Organizations could not configure individual candidate forms for the approvals process.

Visible Changes

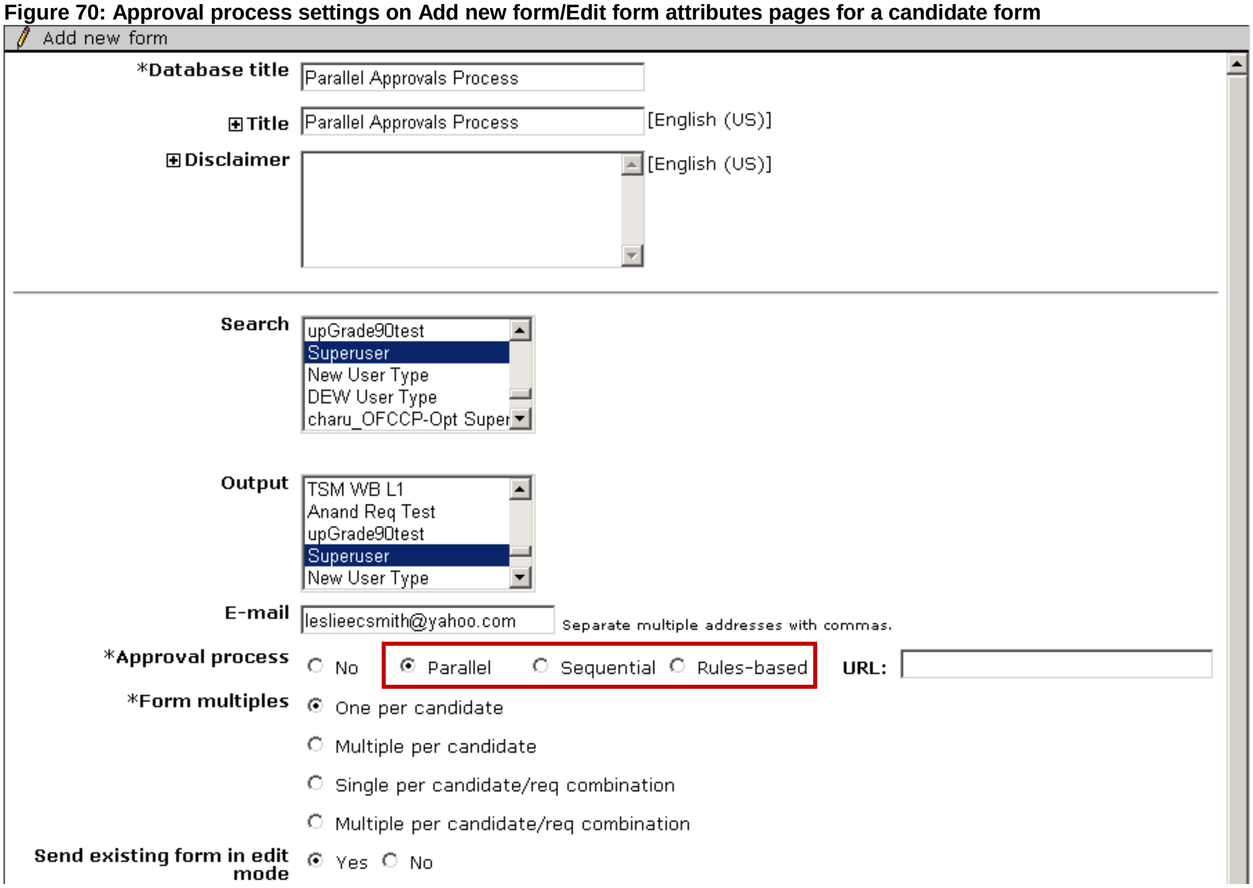
There are visible changes associated with this feature in Workbench.
Also what if you had the standard approvals process enabled before this change?

Configuration

Workbench

These steps assume your organization wants to enable an approval process (Parallel, Sequential, or Rules-based) on an individual form basis for One per candidate or Single per candidate/req candidate forms if you have not already done so. **Note:** KRB's standard approval process was renamed to the *Parallel* approval process to distinguish it from the new *Sequential* approval process introduced in this release.

Figure 70: Approval process settings on Add new form/Edit form attributes pages for a candidate form

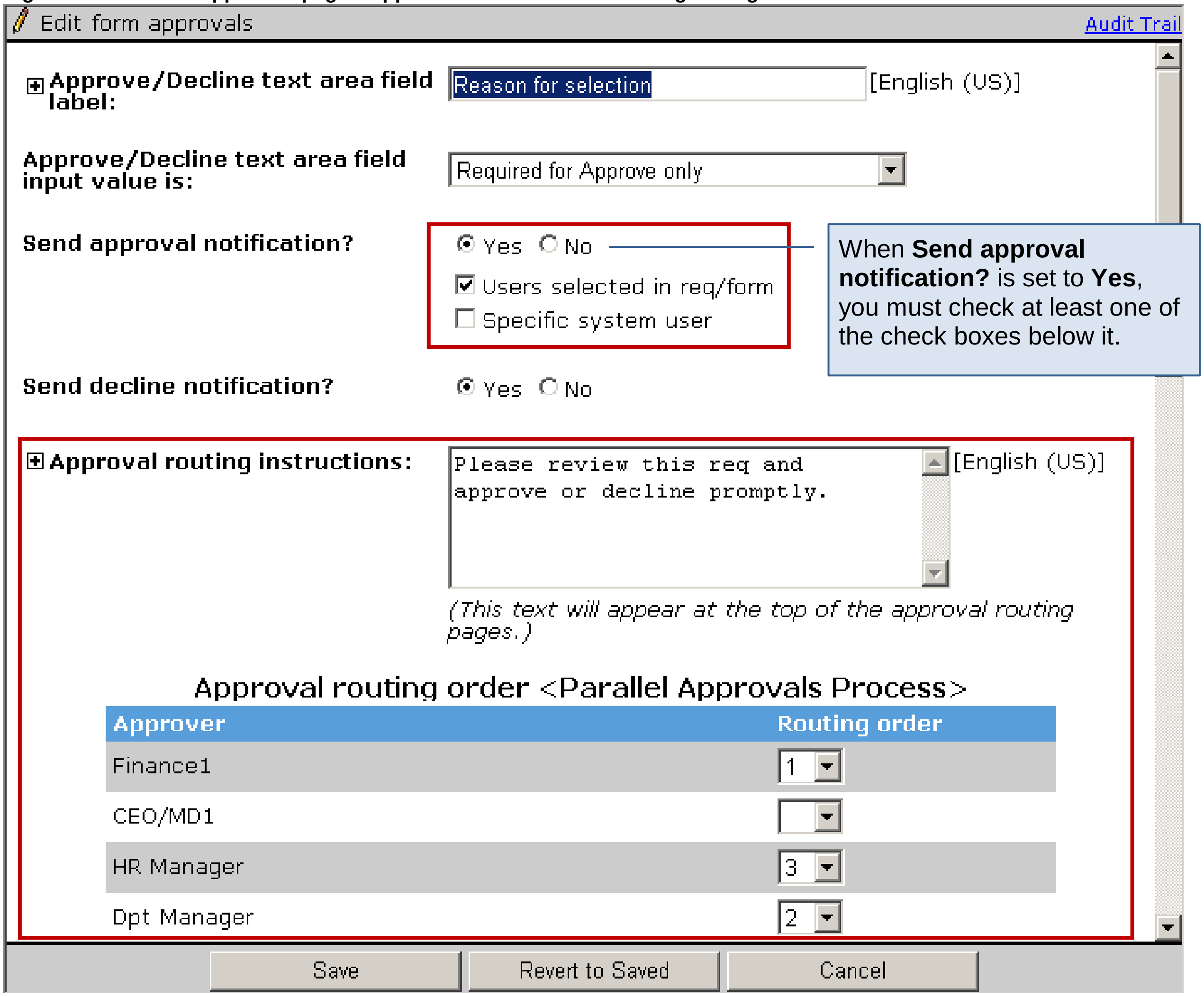


On each **One per candidate** and **Single per candidate/req** form in your system for which you want approval notification, configure the following settings:

1. Select **Tools > Forms > Candidate Forms.**
2. Select a specific form and click pencil icon in the **Edit form approvals** column for that form's row.
3. The **Edit form approvals** page opens.
4. Set the setting **Send approval notification** to **Yes**. (**No** is the default setting.) Once it is enabled, you must check at least one of the following checkboxes or Workbench displays an error message. These settings determine which notification fields display in KRB forms:
   - Users selected in req/form. It is unchecked by default.
   - Specific system user. It is unchecked by default
5. When you are finished, click **Save**.

See the screen capture on the next page.

Figure 71: Edit form approvals page – approval notification and routing settings



User Experience

If your organization has enabled Form Approvals and Form Approval Notifications, you see the **Form Approval** section for the candidate form when you are adding, editing, viewing the candidate forms; when eLinking candidate forms for approval; and when eLinking blank forms (assuming that you have the privileges to add, edit and eLink candidate forms).

KRB sends a standard, non-customizable notification to the designated recipients when form approval is complete (that is, all approvers have approved the form or forms).

In the example below, both **Users selected in req/form** and **Specific system users** were checked when Form Approvals was set up in Workbench, so they both appear as recipients in the **Form Approval** section.

Figure 72: Form approval section for a Single per Candidate/Req form

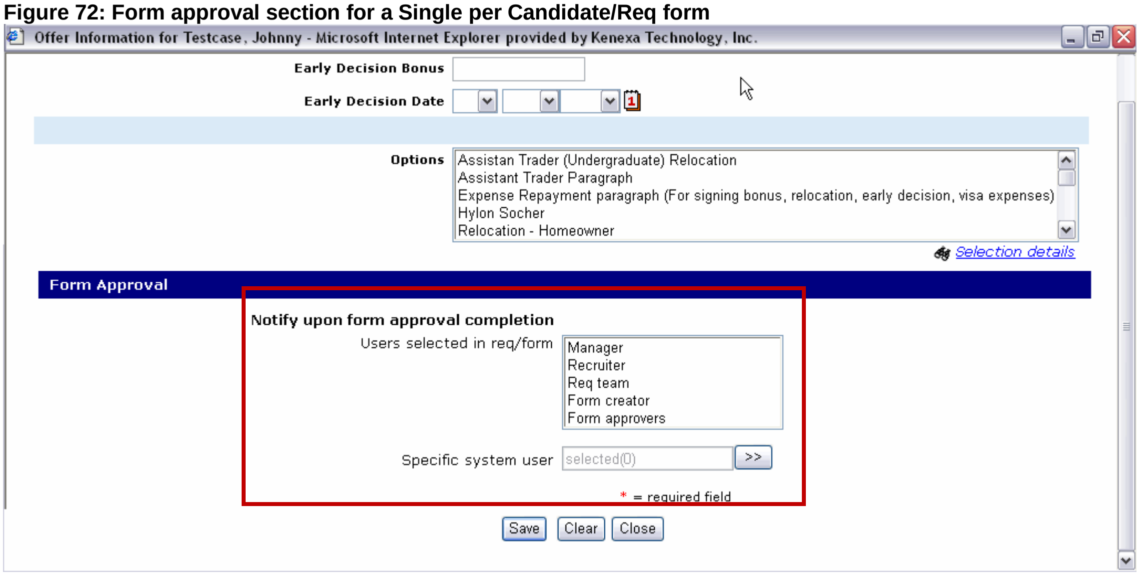


Table 3: Form Approvals Scenarios

Actions	Form Type	Notify upon form approval completion:		
Add/Edit/View candidate form		Users selected in req/form	AND/OR	Specific system users
eLink candidate form Candidate form and candidate's HR status = Pending	One per candidate	Form creators Form approvers	AND/OR	One or multiple system users
	Single per candidate/req	Manager (or custom label) Recruiter (or custom label) Req team (or custom label) Form creator Form approvers	AND/OR	One or multiple system users

Note: The system determines who the Manager, Recruiter, and Req team users are at the time when notification is sent (upon form approval).

Figure 73: Form approval section for a Single per Candidate

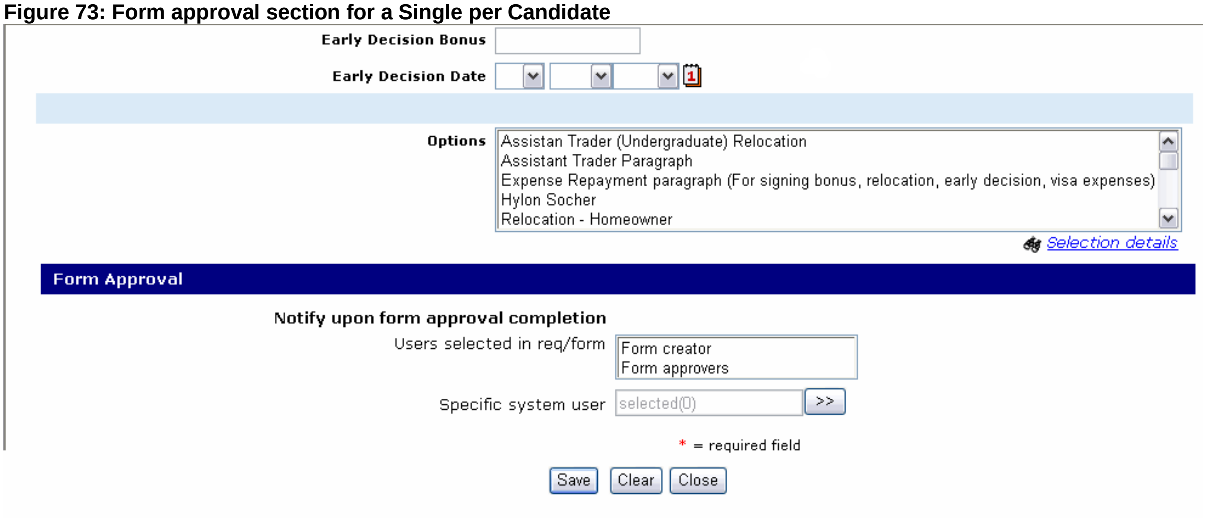
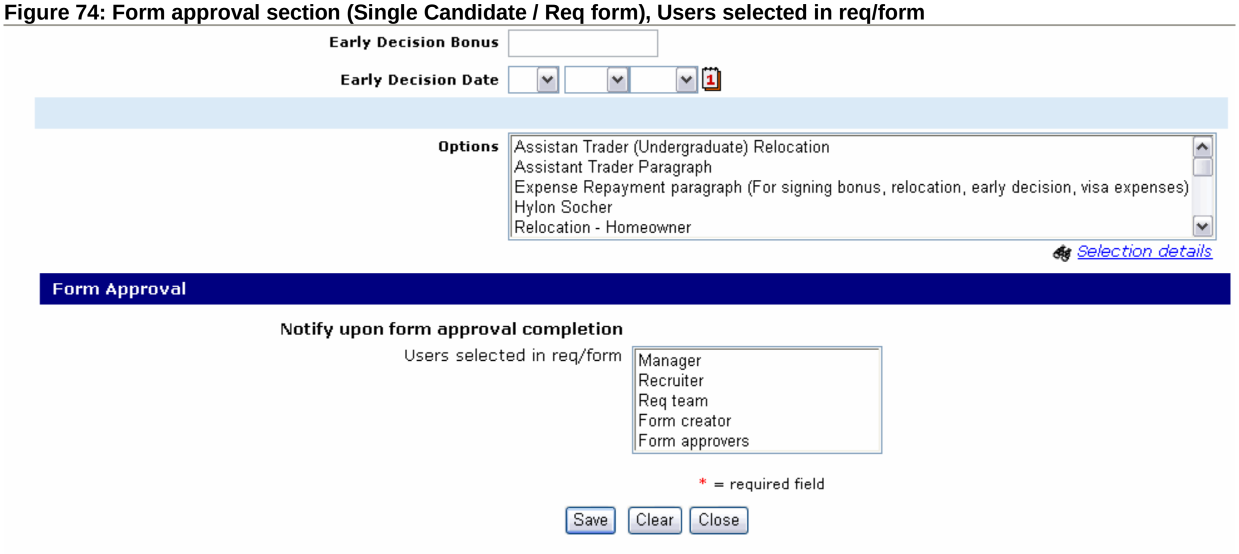


Figure 74: Form approval section (Single Candidate / Req form), Users selected in req/form



The e-mail notification is sent once ALL approvals are in approved status and the form status is changed to Approved.

Note: The e-mail subject line and message are not configurable.

Candidate Attachment Privileges

This enhancement both extends and restricts the ability of KRB users to see candidate attachments. With this feature:

- You can restrict by user type the ability to view candidate attachments with access based on the attachment's association to a requisition. You do this by assigning attachments that should be handled in this manner to an attachment category that is "sensitive."
- You can extend to multiple recruiters the ability to view some types of candidate attachments uploaded through a Talent Gateway for a job-specific application instead of restricting the attachment to roles associated with the requisition. You do this by assigning attachments that should be handled in this manner to an attachment category that is non-sensitive.

When an attachment category is designated as sensitive, the following users can see the attachments in this category when they have the **Attachments – view "Sensitive attachments in my req"** privilege checked for their user type(s):

- Req team members
- Req creators
- Recruiter
- Manager

Date Available

This feature is available for use in R12.1 Build 3.

US: October 8, 2009

EU: October 14, 2009

Cost

No additional cost.

How Do I Get this Feature?

Your Kenexa consultant or Certified Workbench user can assign attachment privileges by user type and further restrict access based on an attachment's association to a requisition.

Benefits

Clients can allow restricted users to see req-level attachments on other reqs, including sensitive reqs.

How It Worked Before

KRB users could view attachments considered sensitive regardless of their user type or relationship to the requisition.

Visible Changes

There are visible changes in Workbench to Attachment categories and User type privileges.

Workbench Configuration

The major configuration steps are:

1. Create one or more attachment categories that have the attribute of being “sensitive.”
2. Enable the user type privilege **Attachments – view “Sensitive attachments in my req”**.

   Note: The standard req privileges are honored, so if the user has any of the “my req” privileges enabled, they work in conjunction with this privilege.

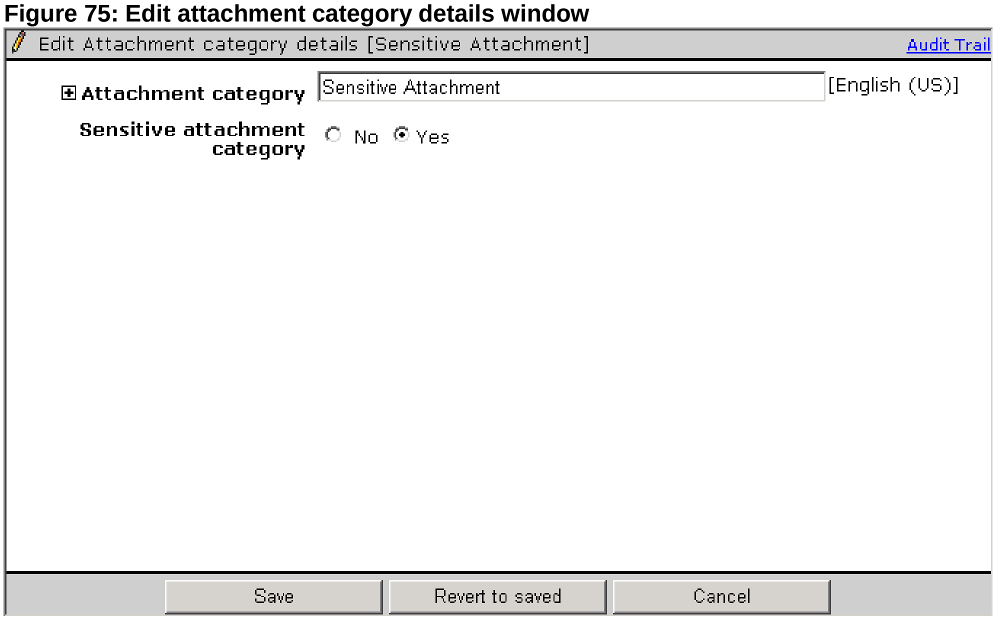
Creating Sensitive Attachment Categories

To create attachment categories that have a designation of “sensitive”:

1. In Workbench, select **Tools > Settings > Attachment categories**.
2. Add a new attachment category or edit an existing one.
3. Select **Yes** for **Sensitive attachment category**

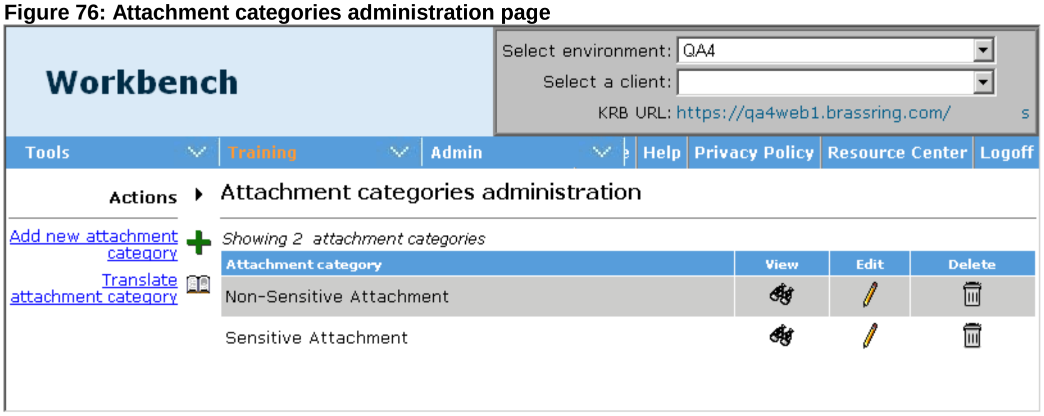
   The default setting for attachment categories is **No**. When set to **Yes**, *only* Req team members, Req creators, and users selected as Recruiter or Manager can view attachments designated as “sensitive.”

Figure 75: Edit attachment category details window



1. Click **Save** and the window closes.
2. The **Attachment categories administration** page is updated with the new or changed attachment category.

Figure 76: Attachment categories administration page



Enabling the User Type Privileges

Enable the following:

- The user type privilege **Attachments – view "Sensitive attachments in my req"** for Recruiters, Hiring Managers, Req creators, and other user types whose members are on the Req team.

  AND

- One or both of:
  - Attachments – view "All attachments uploaded via Agency Manager"
  - Attachments – view "All attachments uploaded via Gateway"

See the next three sections for more information.

Viewing Sensitive Attachments in My Reqs Privilege

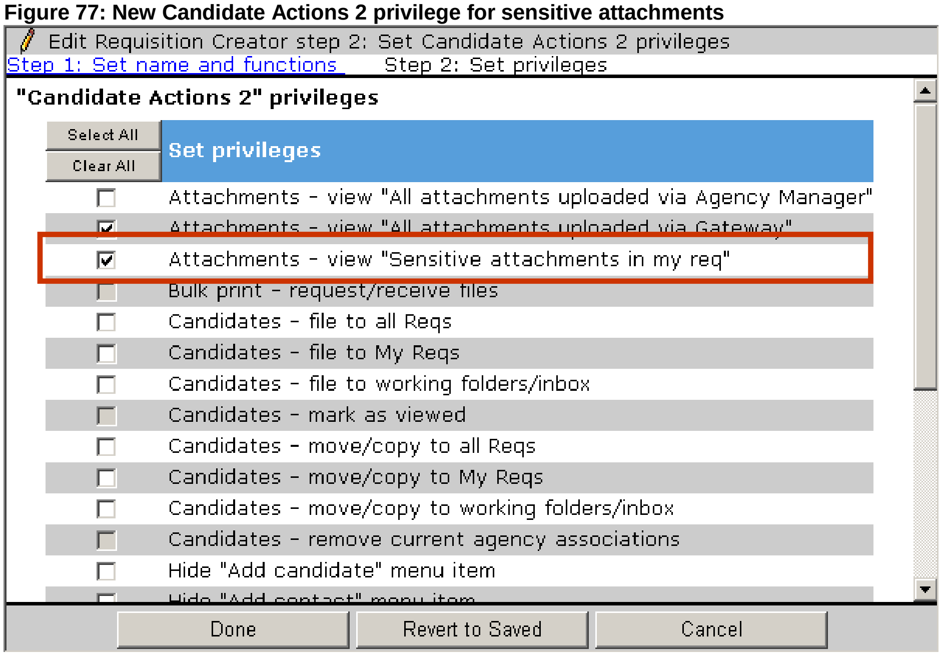
Enable the user type privilege in the **Candidate Actions 2** functional group: **Attachments – view "Sensitive attachments in my req"** This privilege is unchecked by default.

When this privilege is enabled for a user type, the users of this user type will be able to view "Sensitive attachments in my req" when the attachment is associated with a req if:

- The user created the requisition (the Req creator).
- The user was selected as either the Manager or Recruiter for that requisition.
- The user was selected as part of the Req team for that requisition.

If an attachment is not associated with a req and the user has the new privilege enabled, the user will be able to view all other types of candidate attachments that are uploaded through the Talent Gateway or KRB

Figure 77: New Candidate Actions 2 privilege for sensitive attachments

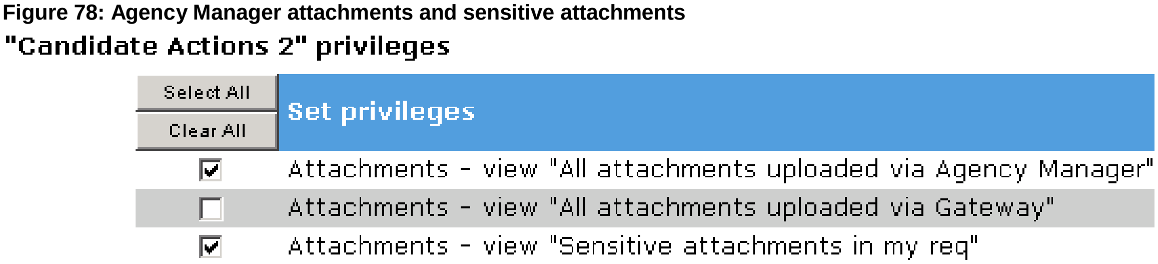


Sensitive Attachments Uploaded through Agency Manager

To allow users of a specific user type to view sensitive attachments uploaded through an Agency Manager, check the following two privileges in **Candidate Actions 2** category, as shown in Figure 99:

- Attachments – view “All attachments uploaded via Agency Manager
- Attachments – view “Sensitive attachments in my req”

Figure 78: Agency Manager attachments and sensitive attachments

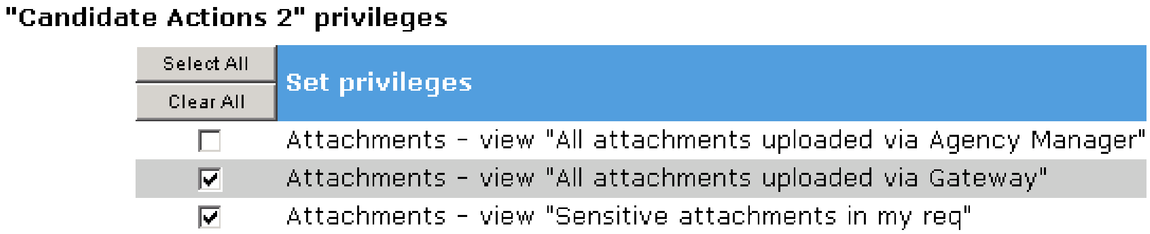


Sensitive Attachments Uploaded through Talent Gateways

To allow users of a specific user type to view sensitive attachments uploaded through a Talent Gateway, check the following two privileges in Candidate Actions 2 category, as shown in Figure 100:

- Attachments – view “All attachments uploaded via Gateway
- Attachments – view “Sensitive attachments in my req”

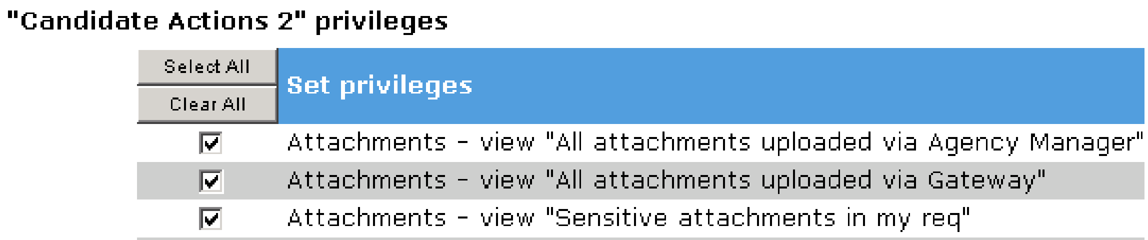
Figure 79: Combination of TG attachments and sensitive attachments



Sensitive Attachments Uploaded through Both

To allow users of a specific user type to view sensitive attachments uploaded through either or both Talent Gateways and Agency Managers, check all three privileges as shown in Figure 101:

Figure 80: All three Attachments privileges turned on



User Experience

KRB checks the setting for the new user type privilege (**Attachments - view “Sensitive attachments in my req”**) and whether the attachment is sensitive (that is, it has an attachment category designated to be sensitive) or not.

Attachments on the Talent Record: On the **Attachments** tab of the Talent Record, attachments are displayed according to the user’s user type setting for **Attachments - view “Sensitive attachments in my req”** privilege and according to whether the attachment has an attachment category that is designated as “sensitive.” In addition to having the privilege above, the user must be part of the Req team.

eLinking attachments: When a KRB user sends and/or views an attachment through eLink, users must be part of the Req team and have the **Attachments - view “Sensitive attachments in my req”** privilege turned on for their user type(s) to view and send the eLink with the sensitive attachment.

The grids below summarize which candidate attachments are be visible to the user under different conditions when the candidate is associated with a requisition in KRB.

Agency Manager Upload and Non-Sensitive Attachment Category

Figure 81: General (Jobless) Submission; Source: AM, TG, or KRB upload

NON-SENSITIVE Attachment Category				
Req Attribute	User Permissions – Does the KRB user have one or both of these privileges?			
User is one of: Req Team member, Hiring Manager, Recruiter, or Req Creator for the req?	view "Sensitive attachments in my req" (new)	view "All attachments uploaded via Agency Manager"		To the user, the attachment is:
NO	**YES**	**YES**	>	**viewable**
NO	**YES**	**NO**	>	**viewable**
NO	**NO**	**YES**	>	**hidden**
NO	**NO**	**NO**	>	**hidden**

Grid Legend

Non-sensitive attachments:
Privilege: Attachments – view “All attachments uploaded via Agency Manager”
YES = Viewable. User can view the attachments.
NO = Hidden. User cannot view the attachments.

Note: For non-sensitive attachments, the setting for the privilege **Attachments - view "All attachments uploaded via Agency Manager"** drives the behavior.

Agency Manager Upload and Sensitive Attachment Category

Figure 82: General (Jobless) Submission; Source: AM, TG, or KRB upload

SENSITIVE Attachment Category				
Req Attribute	**User Permissions**			
User is one of: Req Team member, Hiring Manager, Recruiter, or Req Creator for the req?	view "All attachments uploaded via Agency Manager"	view "Sensitive attachments in my req" (new)		To the user, the attachment is:
NO	**YES**	**YES**	>	**viewable**
NO	**YES**	**NO**	>	**hidden**
NO	**NO**	**YES**	>	**hidden**
NO	**NO**	**NO**	>	**hidden**

Grid Legend

Sensitive attachments:
Privilege: Attachments – view “Sensitive attachments in my req”
YES = Viewable. NO = Hidden. User cannot view the attachments.

Note: For sensitive attachments, the setting for the privilege **Attachments - view “Sensitive attachments in my req”** controls the behavior.

Talent Gateway Upload and Non-Sensitive Attachment Category

Non Sensitive Attachment Category				
Req Attribute				
User on Req Team, req hire mgr, req recruiter, or req creator	view "All attachments uploaded via Gateway"	view "Sensitive attachments in my req" (new)		To the user, the attachment is:
YES	**YES**	**YES**	>	**viewable**
YES	**YES**	**NO**	>	**viewable**
YES	**NO**	**YES**	>	**hidden**
YES	**NO**	**NO**	>	**hidden**
NO	**YES**	**YES**	>	**viewable**
NO	**YES**	**NO**	>	**viewable**
NO	**NO**	**YES**	>	**hidden**
NO	**NO**	**NO**	>	**hidden**

Talent Gateway Upload and Sensitive Attachment Category

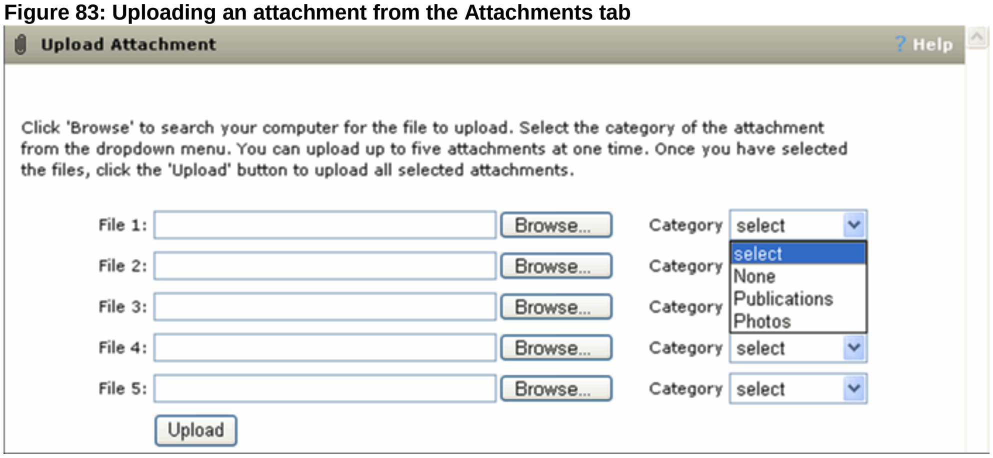
SENSITIVE Attachment Category				
Req Attribute				
User on Req Team, req hire mgr, req recruiter, or req creator	view "All attachments uploaded via Gateway"	view "Sensitive attachments in my req" (new)		To the user, the attachment is:
YES	**YES**	**YES**	>	**viewable**
YES	**YES**	**NO**	>	**hidden**
YES	**NO**	**YES**	>	**viewable**
YES	**NO**	**NO**	>	**hidden**
NO	**YES**	**YES**	>	**hidden**
NO	**YES**	**NO**	>	**hidden**
NO	**NO**	**YES**	>	**hidden**
NO	**NO**	**NO**	>	**hidden**

Selecting Attachments when Candidate is not Associated with a Requisition

If the candidate is not associated with any req in KRB:

- KRB users with the privilege **Attachments – view "Sensitive attachments in my req"** enabled can select the **Sensitive** attachment category when uploading an attachment from the **Attachments tab** in the Talent Record.
- KRB users without the **Attachments – view "Sensitive attachments in my req"** privilege enabled do not see the **Sensitive** attachment category when uploading an attachment from the **Attachments** tab in the Talent Record.

Figure 83: Uploading an attachment from the Attachments tab



Configurable Candidate Form Approval Field

For candidate forms that are configured to be routed for approval, Approval Team members can choose either **Approve** or **Decline** for the type of action in the **Approval selection** field and fill out the **Reason for selection** (the **Approve/Decline text area field label**).

Your organization can require that KRB users enter a reason when they approve, when they decline, or when they either approve or decline a candidate form. For example, **Reason for selection** could be a required field only when the KRB user selects **Decline** for **Approval selection**.

In addition, the **Approve/Decline text area field label** (**Reason for selection** by default) is customizable. Accordingly, if your organization requires that you enter a reason only when you decline to approve a candidate form, you could customize the label to be "Reason for declining this form" or something similar.

Date Available

This feature is available for use in R12 Build 1.
US: August 27, 2009
EU: September 2, 2009

Cost

No additional cost.

How Do I Get this Feature?

Your Kenexa consultant or Certified Workbench User can enable this feature.

Benefits

Clients have the flexibility to make form approval disposition required or optional.

How It Worked Before

The **Reason for approval** field was always required (if the candidate form is configured for approval). This is still the default behavior.

Visible Changes

There is a visible change in Workbench to support customization of the **Reason for selection** field.

Limitations and Known Issues

The text entered in the **Reason for selection** field is visible on the candidate form for both the Approved and Declined status.
KRB users can see the response entered into this field by hovering the mouse over the **Response/comments** column for the appropriate form in the **Form eLink history** section of the eLink tab.

In the "Talent Record – Approve candidate form" approval flow, when the KRB user clicks on **Pending** link in the candidate form, the system prompts the user as follows: "*Do you wish to approve on behalf of the requested Approver?*".

If the user clicks **OK**, the status changes to Approve and the user is not prompted for a reason. Because the **Approve/Decline text area field** is not present in this approval flow, it is out of scope for this project.

Configuration

In Workbench, you can configure the **Approve/Decline text area field label** for each candidate form when adding or editing a form.

The **Approve/Decline text area field label**:

- Stores the default label: **Reason for selection**
- Accepts HTML
- Can be translated into all purchased languages; translations for each available language are defaulted.

Select the option that indicates when users *must* enter a reason into the **Reason for selection** (or custom label) field:

- Required for Approve only
- Required for Decline only
- Always required (either Approve or Decline) (the default)
- Not required

User Experience

In this scenario, the KRB user is eLinking a form for approval. The system is configured so that if the recipient user declines to approve the form, he or she must enter a reason for declining in the "reason" field.

Figure 84: Workbench Setting [Should this be deleted?]

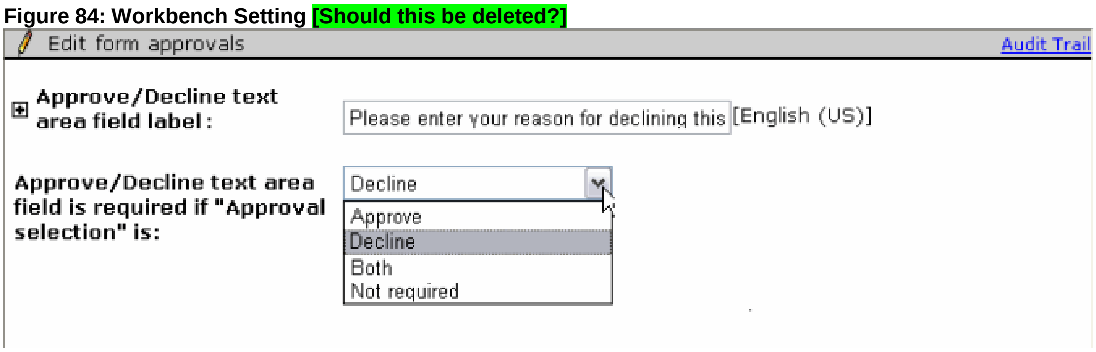
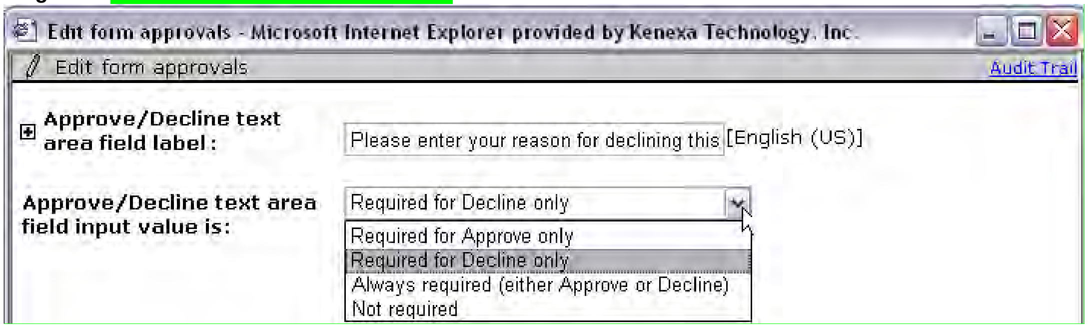


Figure 85: Is thissubstituted for the above>



In KRB, when the user is eLinking the form for approval:

Figure 86: Initial screen (no approval selection is made yet)

Figure 87: KRB User selects “Approve” – The “reason” field does not become mandatory

Figure 6: KRB User selects "Decline" – The "reason" field becomes mandatory

KRB Talent Record – eLink tab – eLink form history section

KRB users can view the contents of the Approve/Decline text area field (what was entered there by and earlier user). This section is the only place currently that users can view what was written in the Approve/Decline text area field.

If the Approve/Decline text area field is populated with data, the value in the **Response/Comments** column is a hyperlink to hover text which displays the data. It is not a clickable link.

Figure 88: KRB – eLink tab – Form eLink history – WITH data in Approve/Decline text area field

Form *eLink* history

Sender name	Recipient e-mail	Considered for	Response/ Comments	*eLink* sent	*eLink* viewed	*eLink* responded
Kubicki, Janet (518-4618)	janet.kubicki@kenexa.com	Offer Information	Declined	09-Jul-2009	09-Jul-2009	
Kubicki, Janet (518-4618)	janetkubicki@yahoo.com	Assessment Test (Nielson)		25-Jul-2007	25-Jul-2007	25-Jul-2007

Offer not within range

If the Approve/Decline text area field contains no data, the value in the **Response/Comments** column is text.

Figure 89: KRB – eLink tab – Form eLink history – NO data in Approve/Decline text area field

Form *eLink* history

Sender name	Recipient e-mail	Considered for	Response/ Comments	*eLink* sent	*eLink* viewed	*eLink* responded
Kubicki, Janet (518-4618)	janet.kubicki@kenexa.com	Offer Information	Declined	09-Jul-2009	09-Jul-2009	
Kubicki, Janet (518-4618)	janetkubicki@yahoo.com	Assessment Test (Nielson)		25-Jul-2007	25-Jul-2007	25-Jul-2007

Automation Manager: Approval Notification Enhancement

With this enhancement, the Req Aging Trigger notification in Automation Manager sends e-mail notifications to pre-selected approvers who are next in line to approve requisitions. Notifications are sent only if the requisition is in “Pending” status and is in need of approval.

Date Available

This feature is available for use in R12.1 Build 2.

US: September 17, 2009

EU: September 23, 2009

Cost

No additional cost.

How Do I Get this Feature?

If your organization uses Automation Manager already, this enhancement is automatically available to you. If your organization does not use Automation Manager but would like to, please contact your Kenexa consultant for assistance.

Benefits

The Req Aging Trigger notification sends notifications to the appropriate approver, and only for requisitions in the the Pending status.

How It Worked Before

Before this enhancement, all approvers configured for the requisition received the Req Aging Trigger notifications related to that req, regardless of whether or not they have actually approved the req.

Visible Changes

The Automation Manager user interface and configuration procedure have not changed. The behavior of the Req Aging Trigger notification has changed if your organization sends out notifications for requisitions in the Pending status, and if your organization selected Approvers as recipients to the notifications. This enhancement does not affect any other Automation Manager notifications.

Limitations and Known Issues

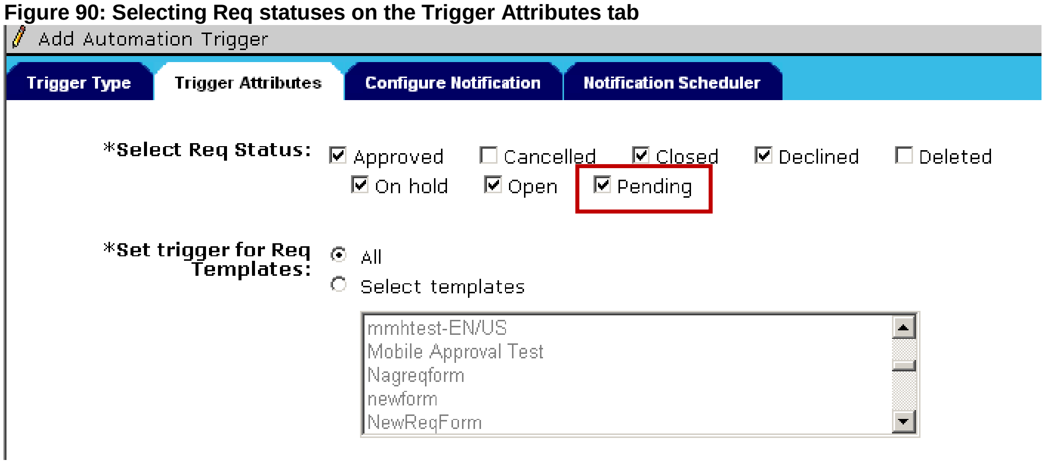
You can add a non-system user as a recipient only if the Approvers recipient type is selected AND the non-system user’s e-mail address was previously added as an approver on the requisition. [QC #138446]

Configuration

The Automation Manager user interface and configuration procedure have not changed. If your organization has the **Req Aging Trigger** configured with the following settings:

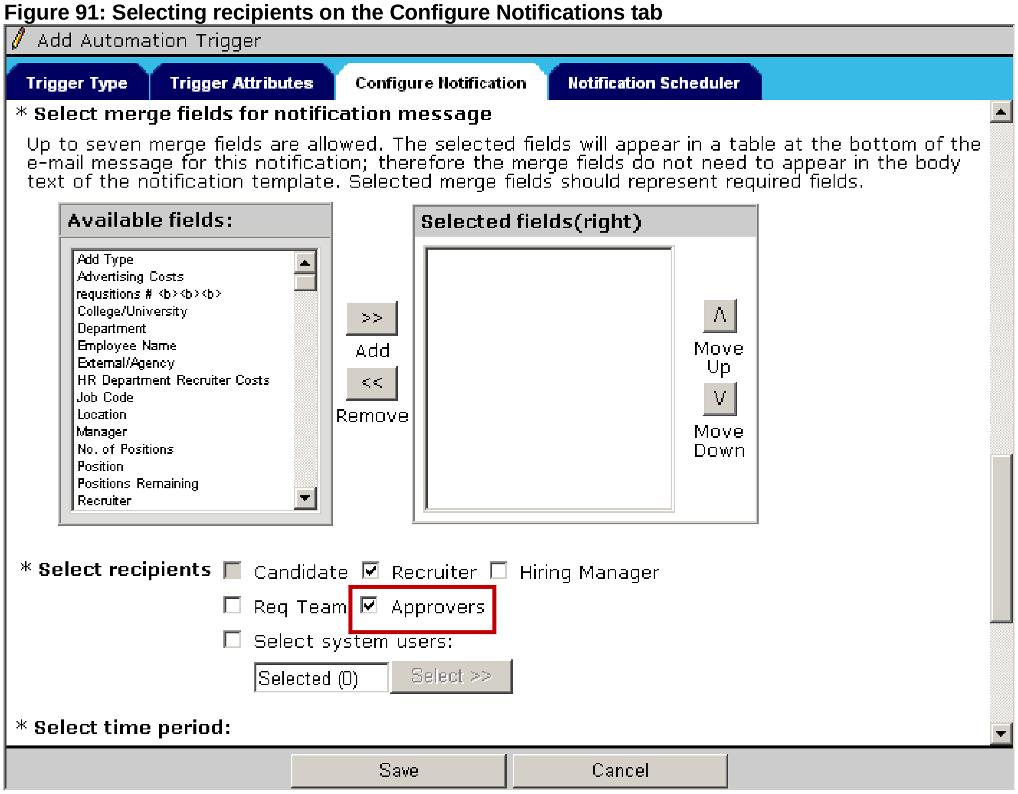
On the **Trigger Attributes** tab, **Pending** is checked in the **Select Req Status** field as one of the req statuses for which notifications are sent.

Figure 90: Selecting Req statuses on the Trigger Attributes tab



On the **Configure Notifications** tab, **Approvers** is checked in the **Select recipients** field.

Figure 91: Selecting recipients on the Configure Notifications tab



The notifications scheduler has not changed; notifications are sent once daily at approximately 6:00 AM (EST) based on the Req aging criteria

User Experience

Instead of all approvers, the next designated approver receives the Req aging notification for requisitions in **Pending** status.

Automation Manager: Form Field Validation

Your organization can limit, through a new trigger attribute, when a candidate communication is sent by Automation Manager's **HR Status update – notify candidate** trigger type.

Once the setting is configured, the notification is sent to those candidates with form field options that match at least one form field option required by the trigger. If the candidate does not have a form on file, he or she is not sent the notification.

Date Available

This feature is available for use in R12.2 Build 0.

US: November 19, 2009

EU: November 25, 2009

Cost

No additional cost.

How Do I Get this Feature?

Your Kenexa consultant or Certified Workbench user can configure this setting for your organization in Workbench.

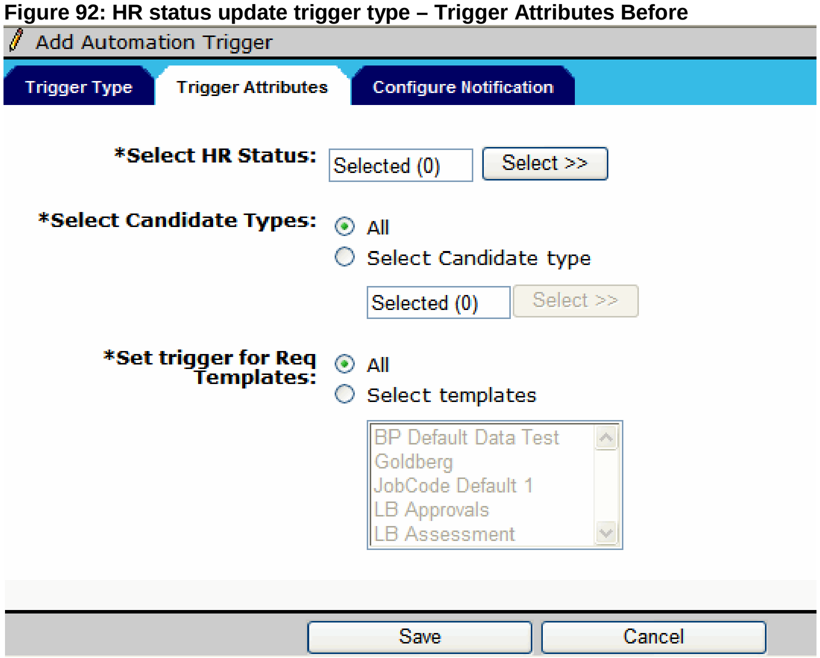
Benefits

The enhanced functionality will provide additional flexibility to clients and how they manage their candidates.

How It Worked/How It will Work

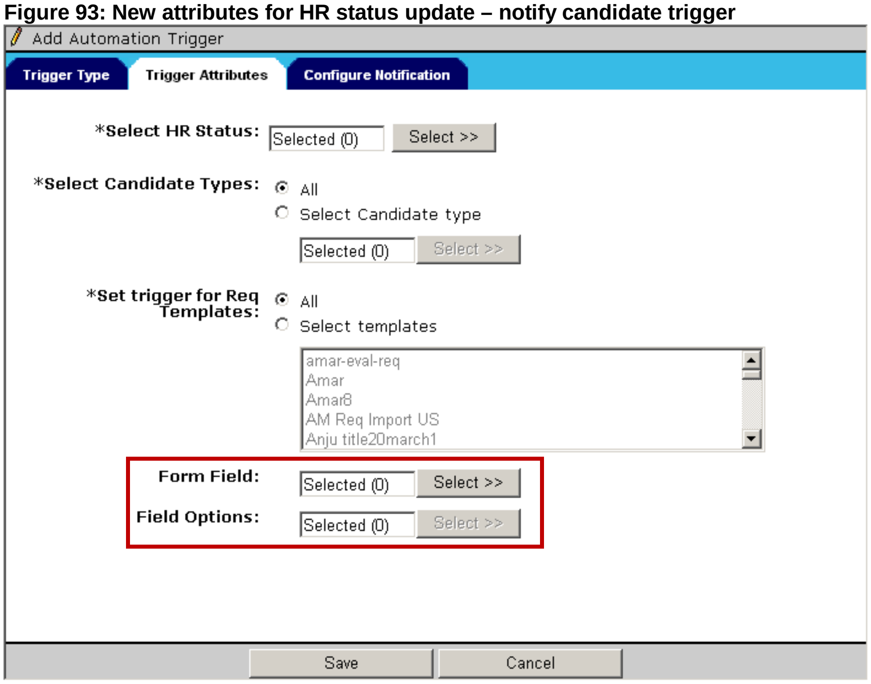
Before this enhancement, the **HR Status update – notify candidate** trigger could be limited by candidate type or Req template only.

Figure 92: HR status update trigger type – Trigger Attributes Before



After this enhancement, your organization can select a form field and one or more selection options associated with that form field to validate against the presence or absence of matching data in the selected candidate's form field. Notifications are sent when the candidate's HR status is updated if the form field and form field option(s) selected for the trigger match the candidate data in the form.

Figure 93: New attributes for HR status update – notify candidate trigger



Visible Changes

There is a visible change in Workbench associated with this feature. See

Configuration

To configure the form field and form field options:

1. In Workbench, navigate to Automation Manager.
2. Create or edit the HR Status update – notify candidate trigger type(s).
3. Search for and select the form field that should trigger a notification to the candidate when the candidate's HR status (selected in this trigger) is updated.
4. Select field option(s) for the form field that should trigger a notification to the candidate when the candidate's HR status (selected in this trigger) is updated.

Rules for Selecting Form Fields and Field Options

- You can select one (1) field only.
- You can select from a list of all form fields that have field options associated with Single per candidate or Single per candidate/req forms.
- The field types are: Single-select, Radio, Checkbox, Multi-select, and Query-select.
- The list displays active and inactive fields and options; inactive items have the suffix – Inactive.
- You cannot inactivate a selected field.
- You cannot change the form field type once it is associated with a trigger.
- You cannot inactivate or delete the form while it is being used for the trigger.
- You cannot change the form type from single per candidate or single per candidate/req to multiple/candidate or multiple/candidate/req once it is being used for the trigger.

Figure 94: Form field selected

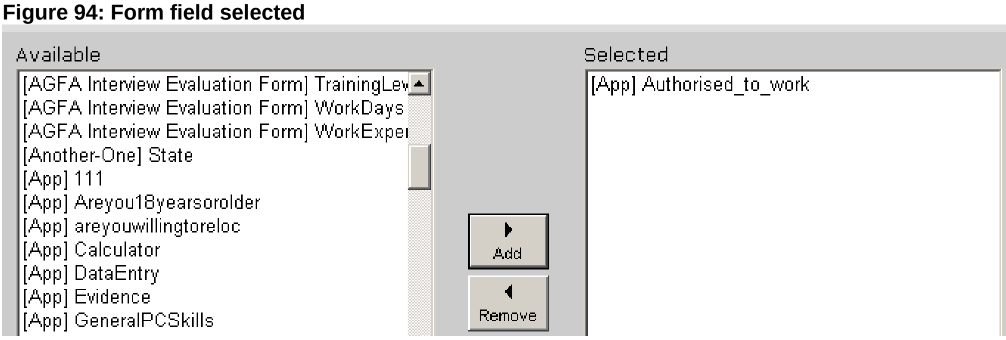


Figure 95: Form field option selected

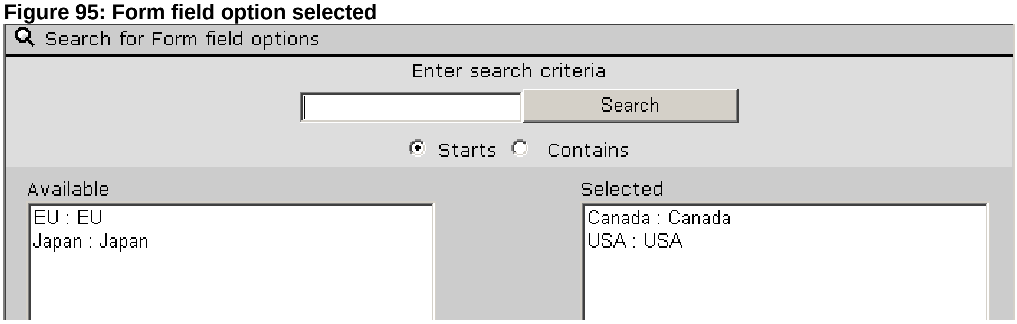
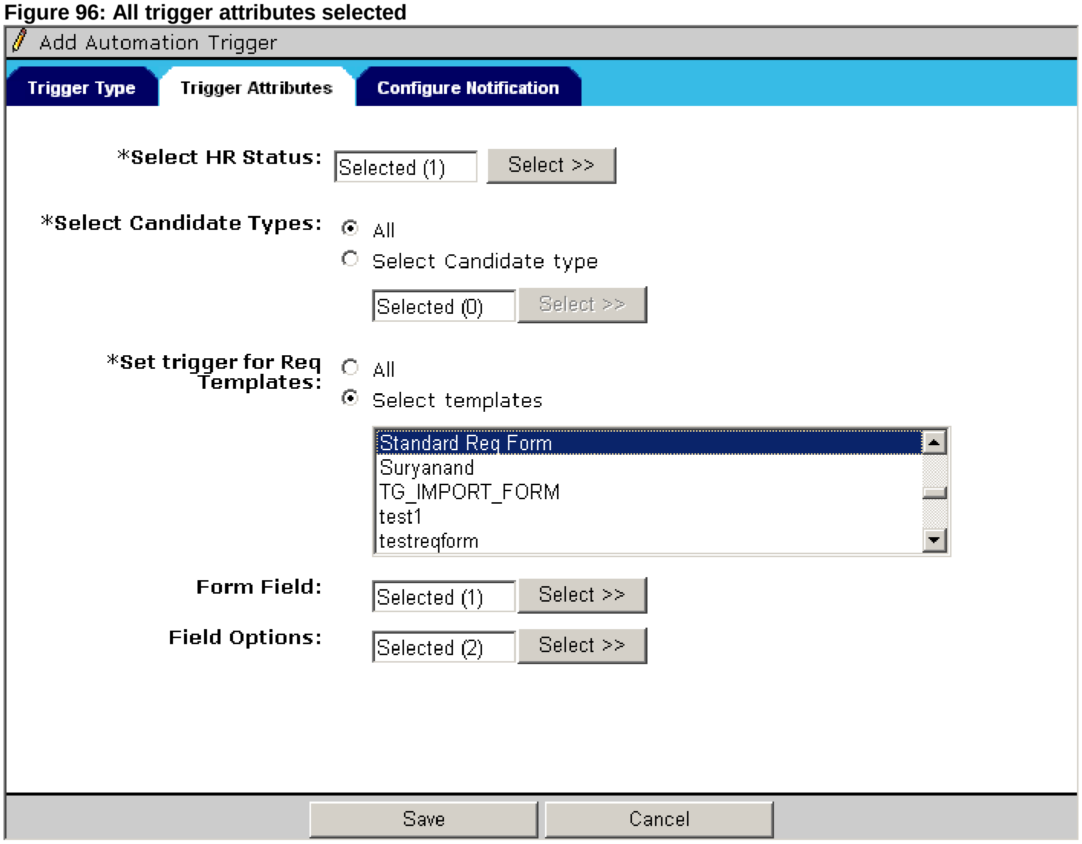


Figure 96: All trigger attributes selected



Sequential Candidate Form Approval

Using the sequential approval process, your organization can control the sequence of approvals for candidate forms in a manner similar to that of requisition forms.

Date Available

This feature is available for use in R12.1 Build 4.

US: October 29, 2009

EU: November 5, 2009

Cost

No additional cost.

How Do I Get this Feature?

Your Kenexa consultant or Certified Workbench user can configure candidate forms to use the Sequential approval process.

Benefits

Many customers want to control the sequence of approvals for candidate forms.

How It Worked Before

In the standard approval process (which has been renamed “Parallel approval process” in this release), when KRB users route candidate forms for approval, approvers received the candidate form simultaneously. Approvers can approve or decline a candidate form at any time with no dependency on another approver’s approval.

Visible Changes

There are visible changes associated with this project in Workbench and in KRB. Please see the detailed description in other sections.

Migration Information

If your organization was using the standard KRB form approval process, it has been renamed to the “Parallel approval process.”

Configuration

Your organization can enable the form approvals process for individual candidate forms in Workbench.

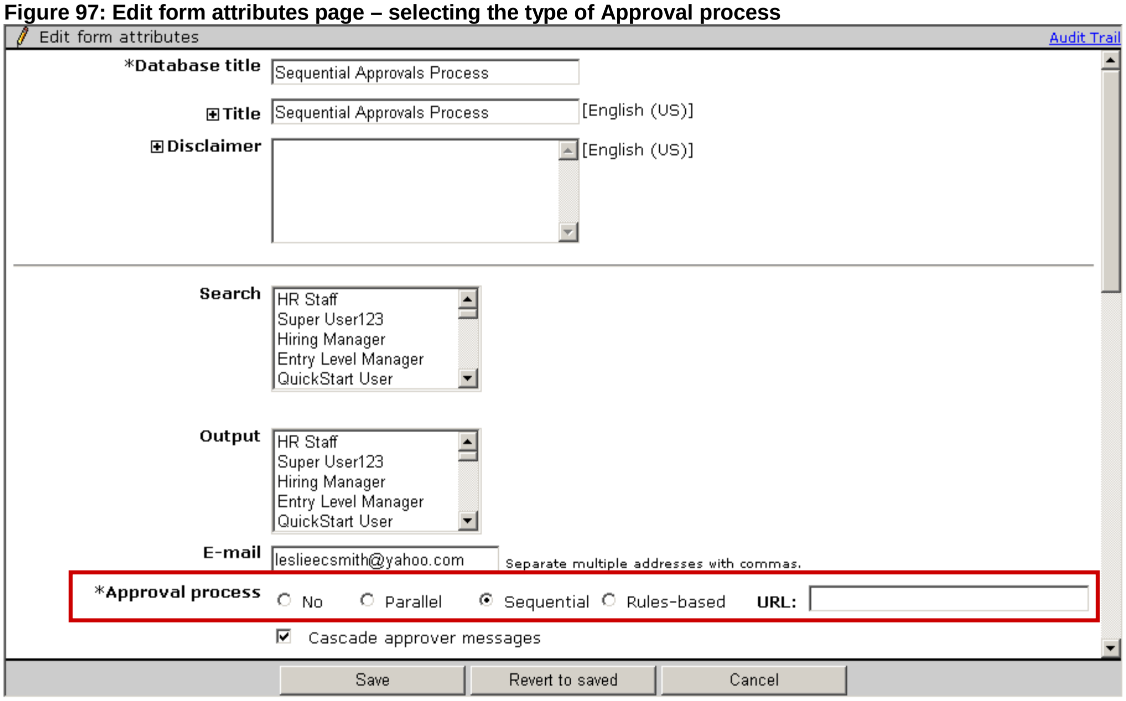
Workbench

To enable the approvals process for a form:

1. In Workbench, select **Tools > Forms > Candidate forms**.
2. On the **Candidate forms** page, click the pencil icon in the **Edit form attributes** column for the form.

3. The **Edit form attributes** page displays for the selected form.
4. In the **Approval process field**, select **Sequential**. To include all previous Approver messages, check **Cascade approver messages**. (See page 132 for more information about this feature. It is new in this release.)

Figure 97: Edit form attributes page – selecting the type of Approval process



5. Configure the rest of the settings on this form as necessary and click **Save**.

Configure Approval Levels

Create approval levels if you have not already done so. To create approval levels, select **Tools > Forms > Approvals** in Workbench. This is existing functionality.

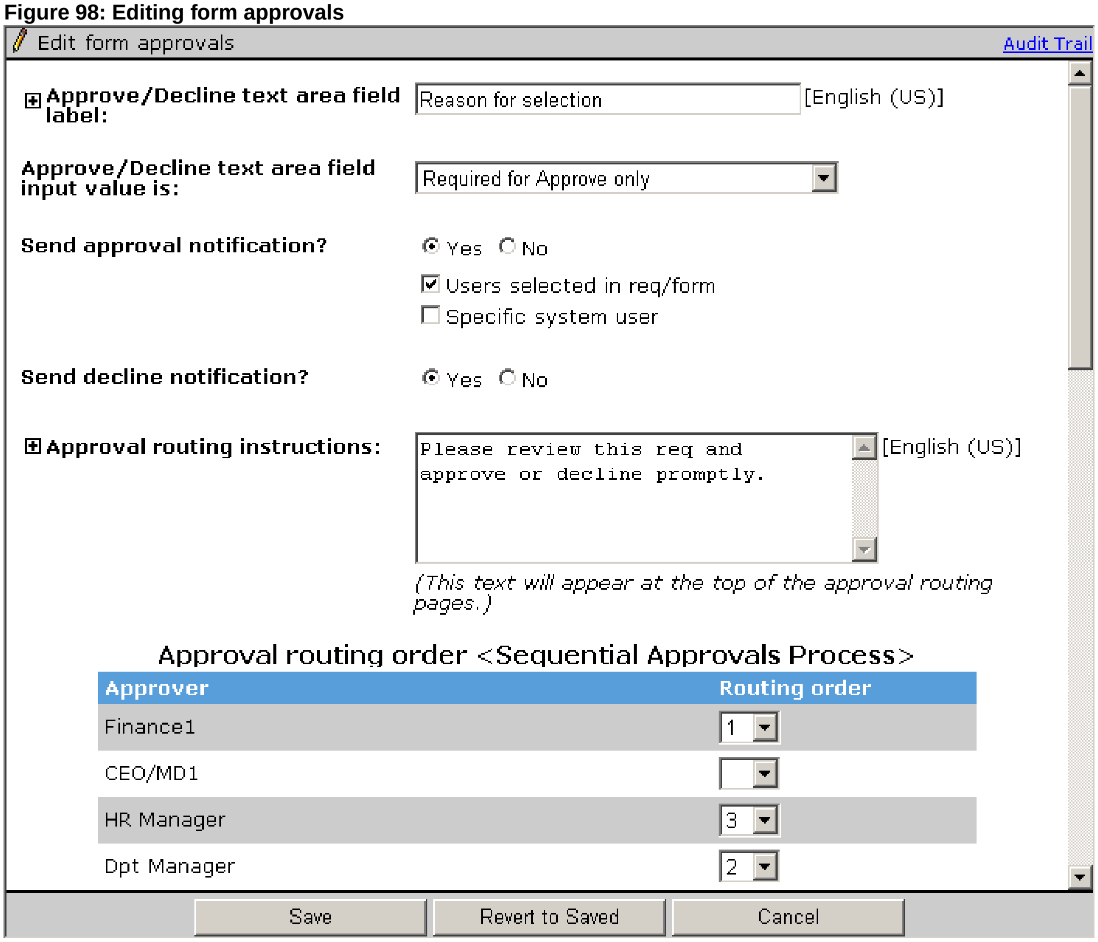
Configure Approval Behavior for the Form

See Table 4 for details about each setting.

To configure form approvals for the form:

1. On the **Candidate forms** page, click the pencil icon for this form in the **Edit form approvals** column.
2. The **Edit form approvals** page opens.

Figure 98: Editing form approvals



3. If the client would like users to be notified when the form is approved, set the field **Send approval notification** to **Yes**.
4. Select the recipients of the approval notifications. You must select at least one of these options:
   – **User selected in req/form**
   – **Specific system users**
5. In the **Approval routing instructions** field, add instructional text that will appear at the top of the approval routing pages in KRB, if desired.
6. In the **Approval routing order** field: (**Note:** Your organization must pre-configure approval groups before you can perform this step. To do so, select **Tools > Forms > Approvals > Add a new approval group** in Workbench.)

   Once your approval groups are configured, you can select the **Routing order** for this approver on the **Edit form approvals** page. (For example, the Finance approver may be required to approve or decline the candidate form before any other approvers, so you would select 1 for its **Approval routing order**.)
7. Click **Save** when you are finished.

Table 4: Edit form attributes page – Approvals process settings

Setting	Description	
Approval process	No	No approvals process.
	Parallel	Formerly **Yes**. In the parallel approval process, forms are sent to all approvers at the same time. Approvers can approve forms independently of each other.
	Sequential	New. In the Sequential approval process, customers can configure the order in which forms should be approved.
	Rules-based	This option has not changed.
Approval routing instructions	Blank by default. Not required. Enter approval routing instructions if desired. This text appears at the top of the approval routing pages that approvers see. Use alphanumeric characters, special characters, and HTML. Your organization can translate the instruction text into all purchased languages.	

Publish Impact

The new fields are not included in the Publish process at this time when candidate forms are published.

KRB User Experience

KRB users encounter the sequential form approval process in many workflows: When adding or editing candidate forms and when eLinking candidate forms for approval.

Adding Candidate Forms

Your organization's previous configuration level determine who the valid users are for each approval level, and whether users can bypass approvals and/or route them to non-system users. To initiate the approval process, click on the "Save and send for approval" button at the bottom of the form.

eLinking Candidate Forms for Approval

For KRB users with the appropriate privileges:

- If you are eLinking a candidate form that has the Sequential approval process enabled, you will see the **Save and send for approval** button at the bottom of the candidate form.
- You can make some selections and save the form without routing it for approval, if desired. Later, you can complete the form and click **Send for approval**.

Once the form has been routed for approval, ANY edits to the form reset all approval statuses and the form would need to be re-initiated for approval.

Changes to the Approve/Decline Workflow for Forms

When you click **Save and send for approval**, the e-mail notification is sent to the designated first approver. KRB displays a validation message.

If/when the first approver approves the candidate form, a notification e-mail is sent to the designated second approver.

Once all approvers approve the form, it is marked as approved and stored with the date of approval.

Adding Forms

Several workflows result in the creation of a form (for example, from the Talent Record **Forms** tab, from a candidate grid forms icon, from an HR status popup form).

1. Add the form and select approvers for each approval level.

Figure 99: KRB – Form approval to add approvers

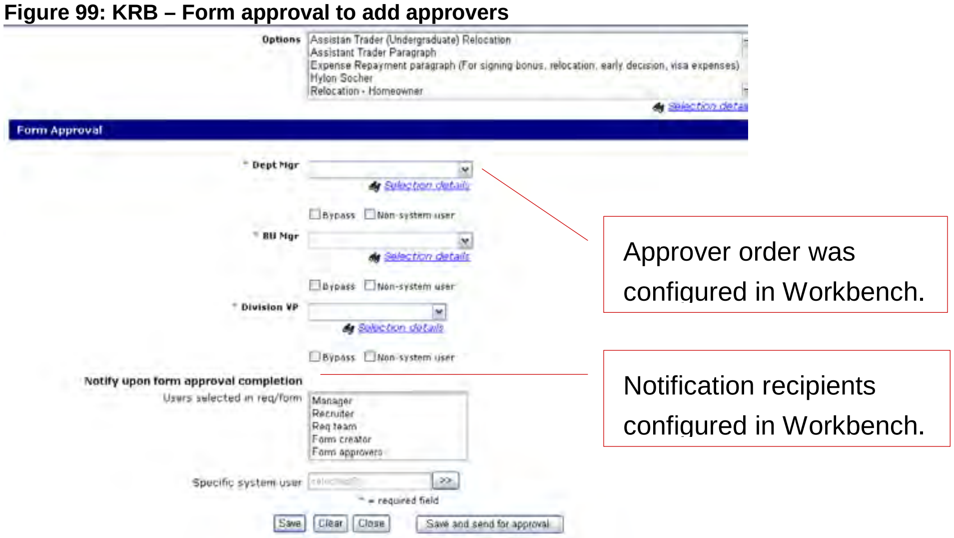
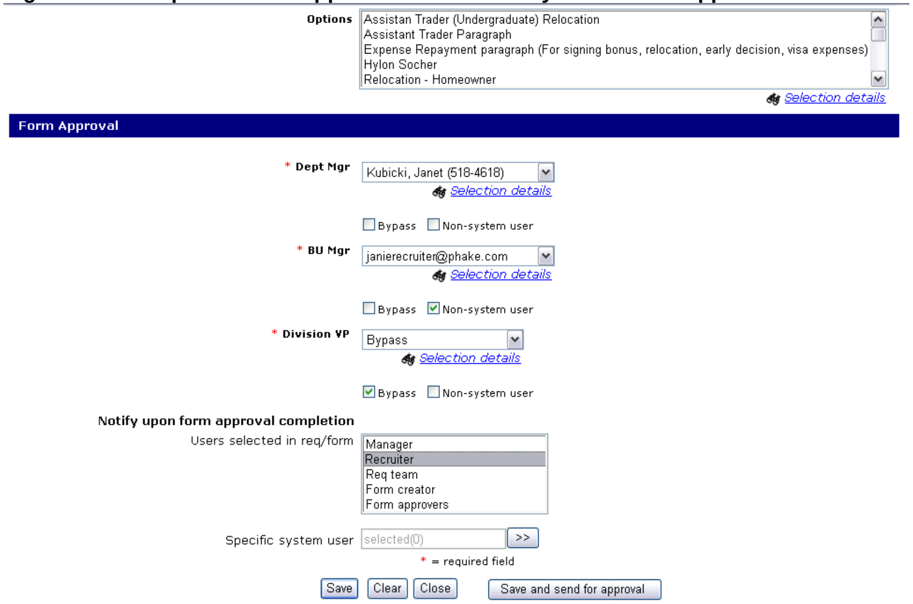


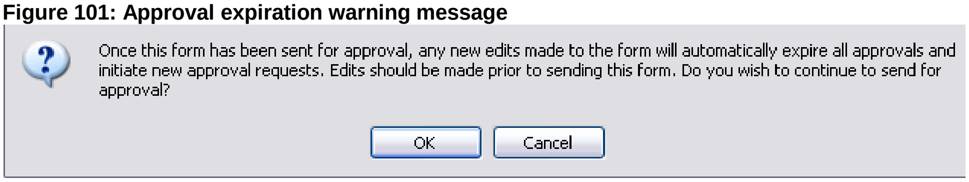
Figure 100: Completed Form Approval section – ready for Send for approval



2. Click **Save and send for approval**. KRB checks all fields for valid values before saving and sending the form. If there are no other approval levels OR all remaining approval levels are set to **Bypass**, KRB saves the form and sets the form status to Approved.
3. The approval expiration warning message displays.

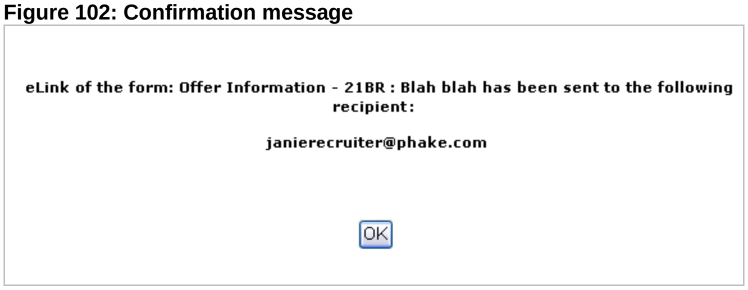
Important: You should finish all edits before clicking **OK** in this window. If you make new edits after sending the form for approval, all approvals expire.

Figure 101: Approval expiration warning message



4. Click **OK**. The form is routed to the e-mail address of the first approver on form.
5. The window closes and the confirmation message displays.

Figure 102: Confirmation message



6. KRB sends an eLink to next approver along with the form to approve.

Viewing Form Approvals

Figure 103: View mode for user with View privileges only

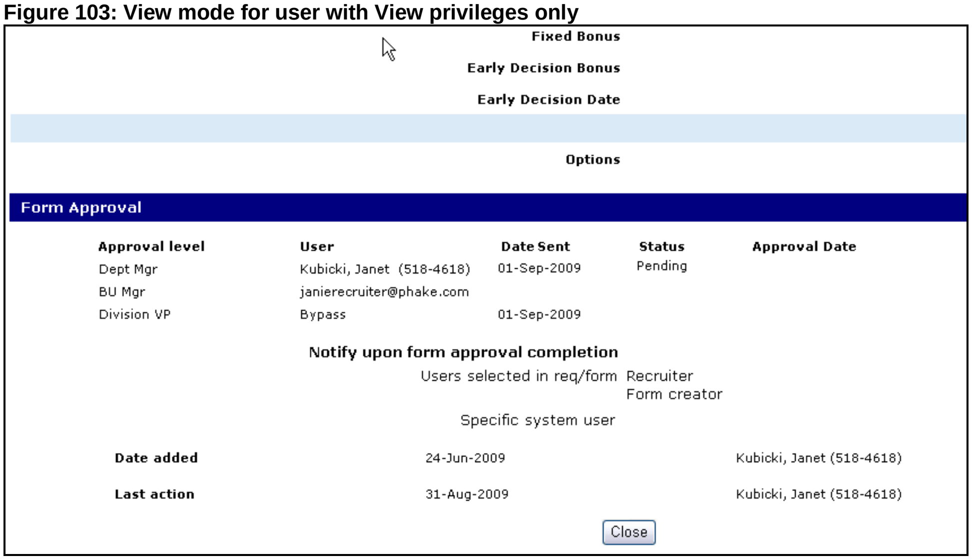


Figure 104: View mode for user with Edit privileges

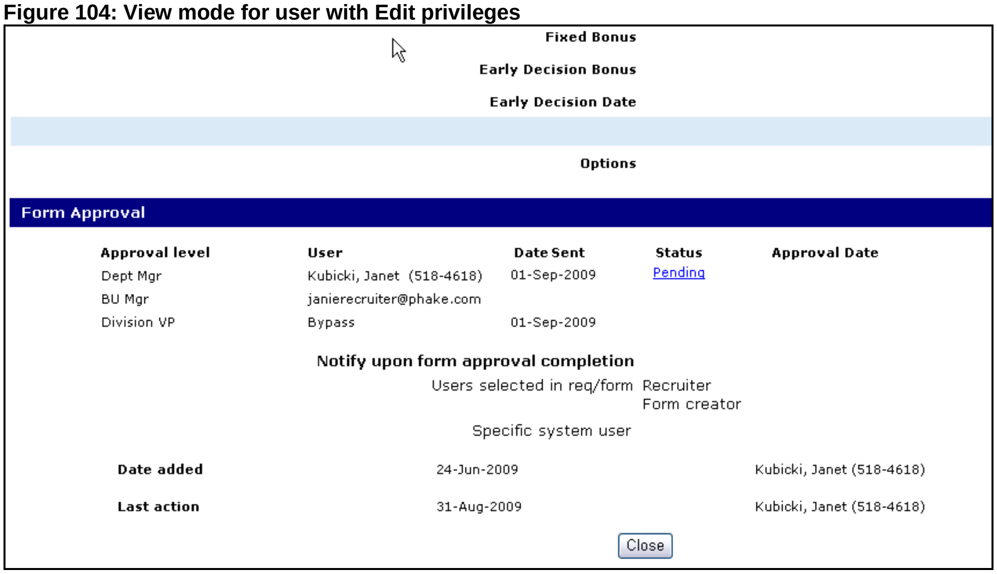


Figure 105: Editing form approvals for a form

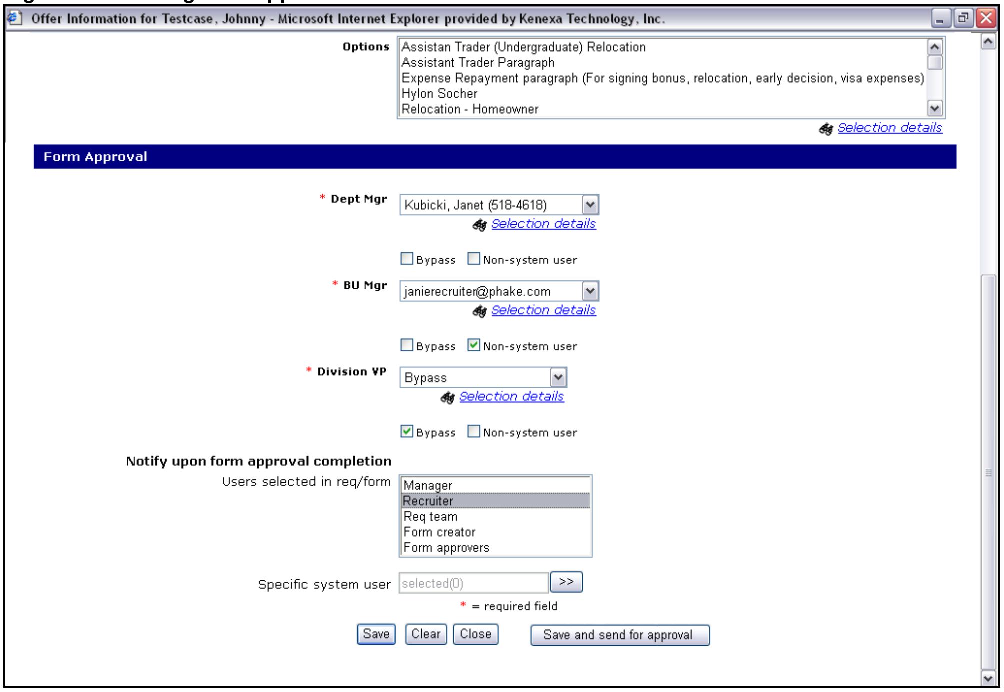
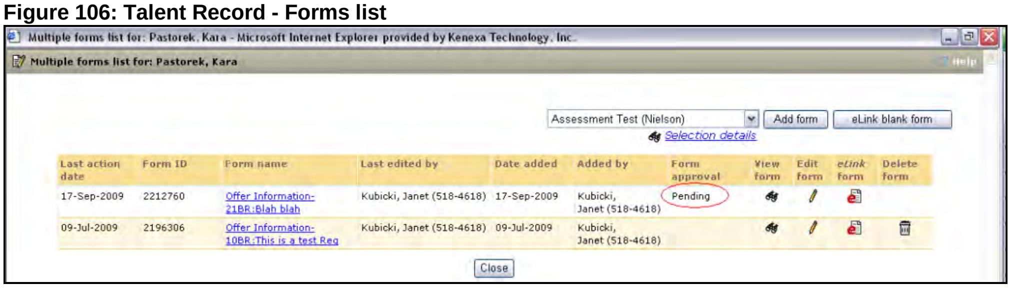


Figure 106: Talent Record - Forms list

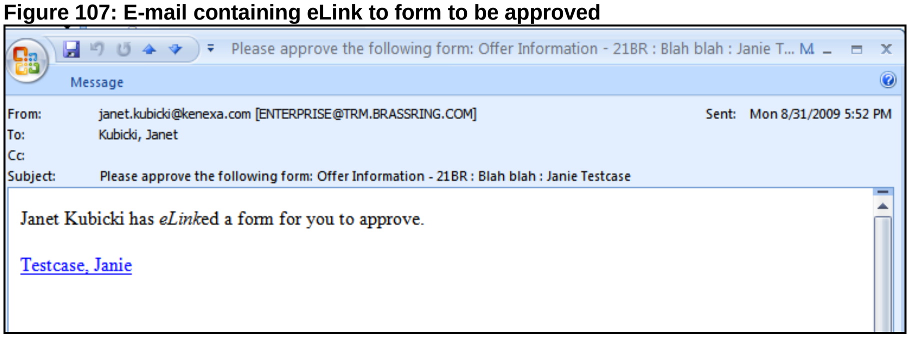


Approval by eLink

When a form is circulated for approval by eLink:

1. The Approver receives the e-mail.

Figure 107: E-mail containing eLink to form to be approved

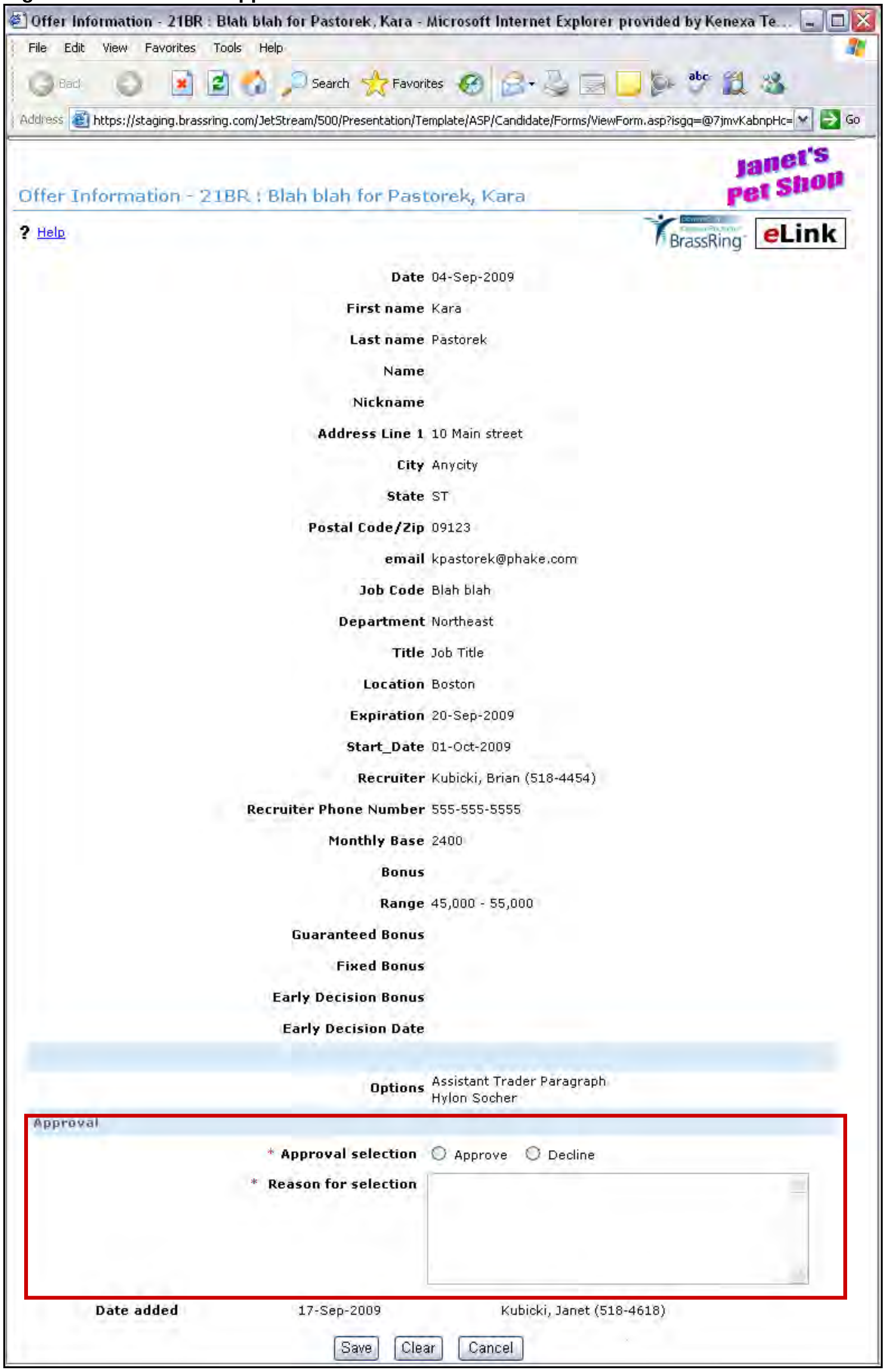


2. The Approver clicks the eLink.
3. The system launches eLink of form for approval in view mode.

   Note: eLinks sent for approval are sent in view mode regardless of the QuickStart user form privileges.

   You cannot edit any fields in this window except **Approve**/**Decline** and **Reason for selection** (or customized text).

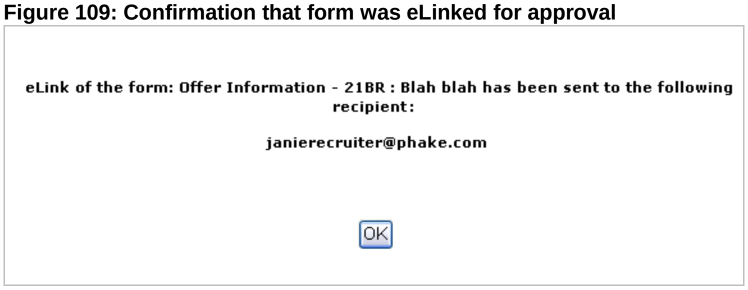
Figure 108: Form to be approved in View mode – three editable fields



4. The Approver selects the **Approve** or **Decline** option and enters a **Reason for selection** if required or desired.
5. The Approver clicks Save to save the changes he or she has made.
6. KRB displays a message with the eLink form information and the recipient.

– If next approver is a system user, <nextapprover> displays <Last name>, <First name> (and user differentiator if configured)
– If next approver is a non-system user, <nextapprover> displays e-mail address entered.

Figure 109: Confirmation that form was eLinked for approval



7. When the Approver clicks **OK**, the window closes.

Figure 110: Viewing the form in View only mode

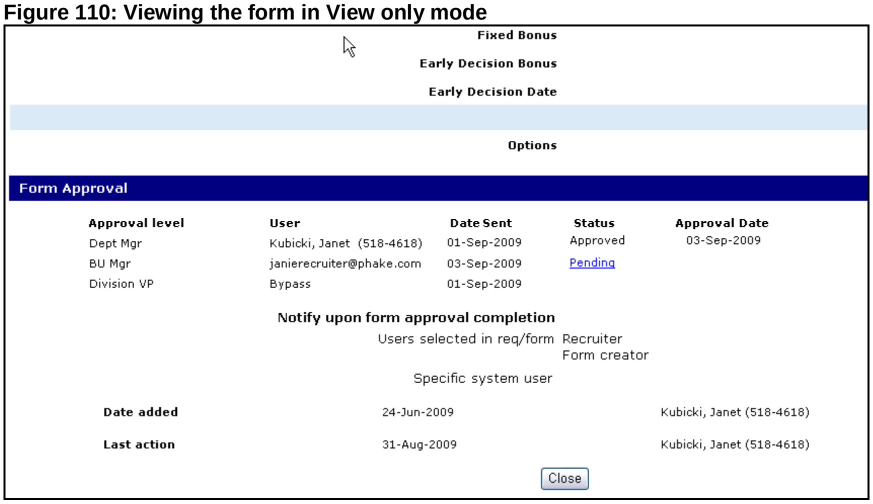


Figure 111: Viewing the form in edit mode

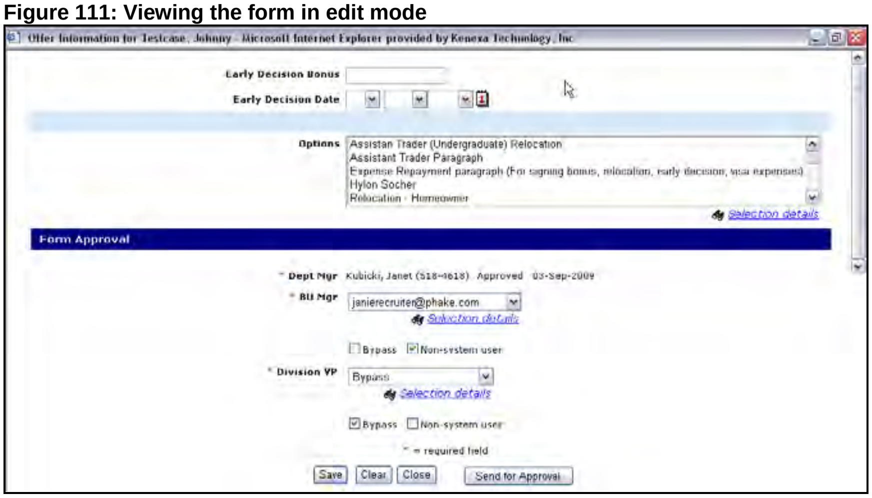
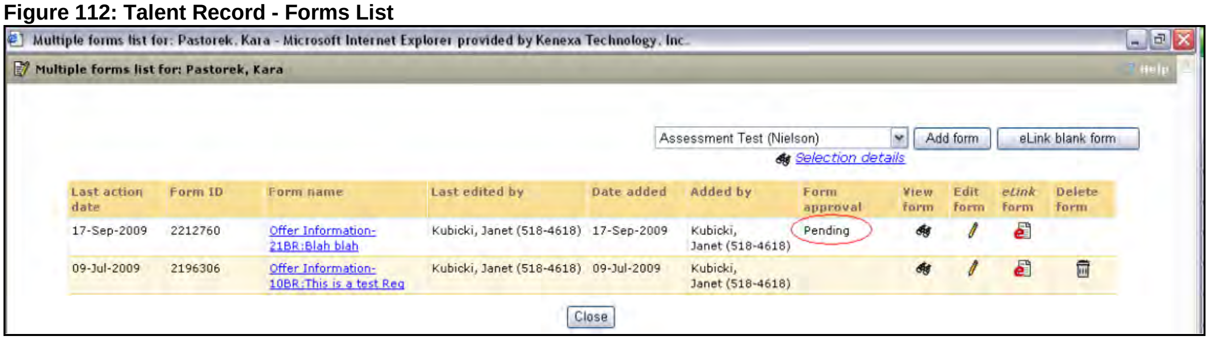


Figure 112: Talent Record - Forms List



Declining a Form by eLink

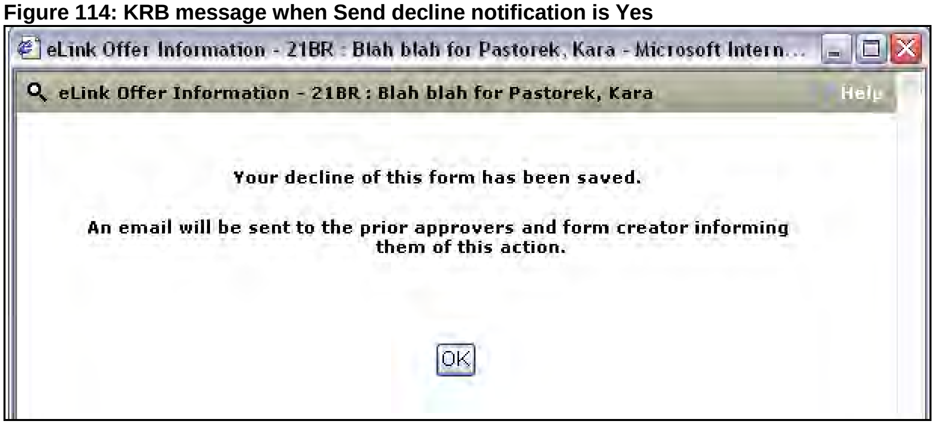
When an Approver selects Decline for Approval selection and (if necessary or desired) enters a reason in the Reason for selection field, KRB sends an acknowledgment depending on the setting for Send decline notification:

- If the form's **Send decline notification** setting is **No**, KRB displays the following message. The Approver clicks **OK** to close the message window.

Figure 113: KRB message when Send decline notification is No

- If the form's Send decline notification setting is Yes, KRB sees the following message. The Approver clicks **OK** to close the message window.

Figure 114: KRB message when Send decline notification is Yes

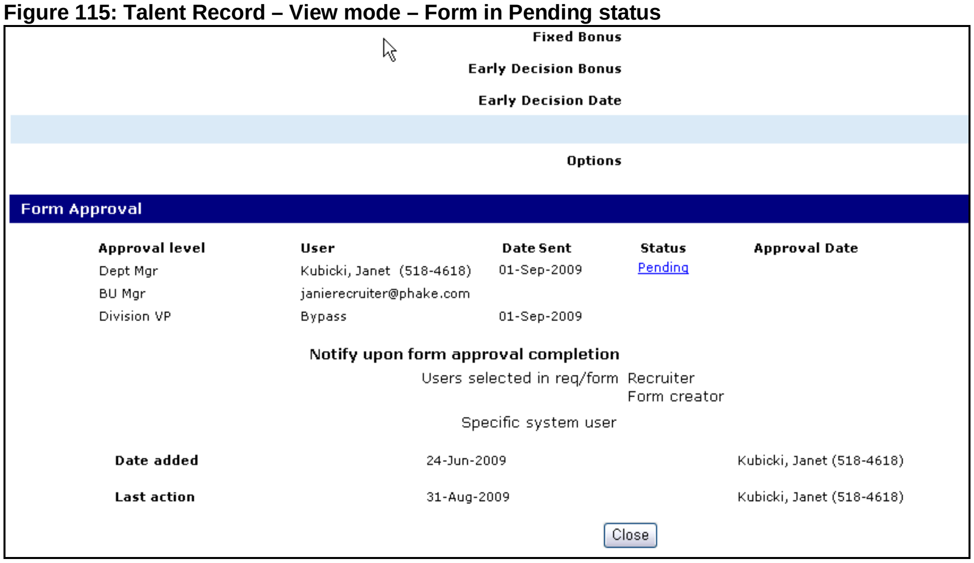


Approving a Form on behalf of an Approver

A user with "edit form" privileges can approve a form on behalf of an approver; for example, when an approver is on vacation.

1. Locate the candidate form in KRB.
2. Click on the form to view it.
3. Scroll down to the **Form approvals** section.
4. Click the **Pending** link under **Status** to approve the form on behalf of an Approver. (The Pending link will be active only if you, as the current user, have privileges to edit the form.)

Figure 115: Talent Record – View mode – Form in Pending status



5. The following message displays:

Figure 116: "Do you wish to approve" message

6. Click **OK** to approve or decline the form on behalf of the approver.
7. The User column is updated with the substitute approver's name on behalf of the name of the original approver. The Approval/Decline Date is updated with the current date. The Status is updated to Approved.
   - If there is another approval level, and it is not set to "Bypass," the form is routed to the next approver
   - If there are no other approval levels, OR all remaining approval levels are set to "Bypass," the form status changes to Approved.

When form status is changed to **Approved** AND **Send approval notifications** is set to **Yes**, the approval notification is sent to the individuals indicated on the form.

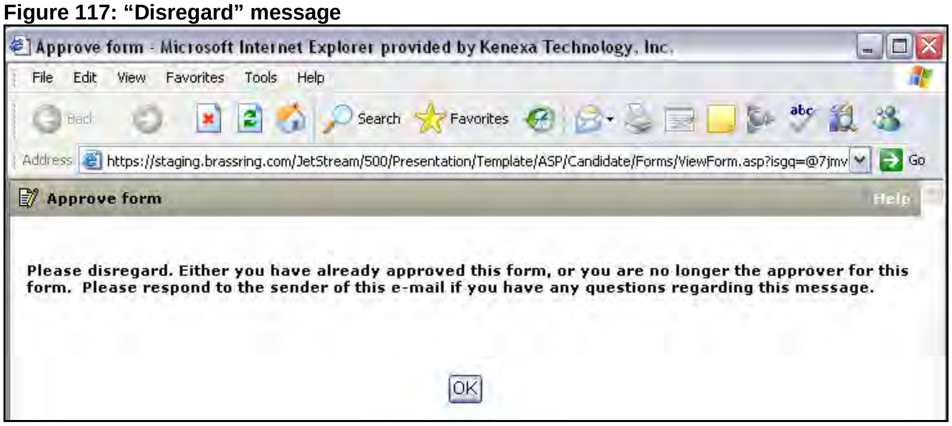
If you click **Cancel**, the message window closes. The form is not approved and it is still in **Pending** status.

When another Approver Overrides an Approval

If an approver has updated the approval status for a candidate form to Approve on behalf of another user, the eLink is no longer valid for the original approver.

If an approver clicks on the eLink in an e-mail that was sent prior to the approval override by another approver in KRB, he or she sees the following error message: "*Please disregard. Either you have already approved this form, or you are no longer the approver for this form. Please respond to the sender of this e-mail if you have any questions regarding this message.*"

Figure 117: "Disregard" message



Editing a Pending, Declined, or Approved Form

If you make any changes to an approved form, the following warning displays when you click Save and send for approval:

> "*Warning: Original approval(s) status(es) will be reset. The form must be sent for new approval(s). Do you wish to continue?*"

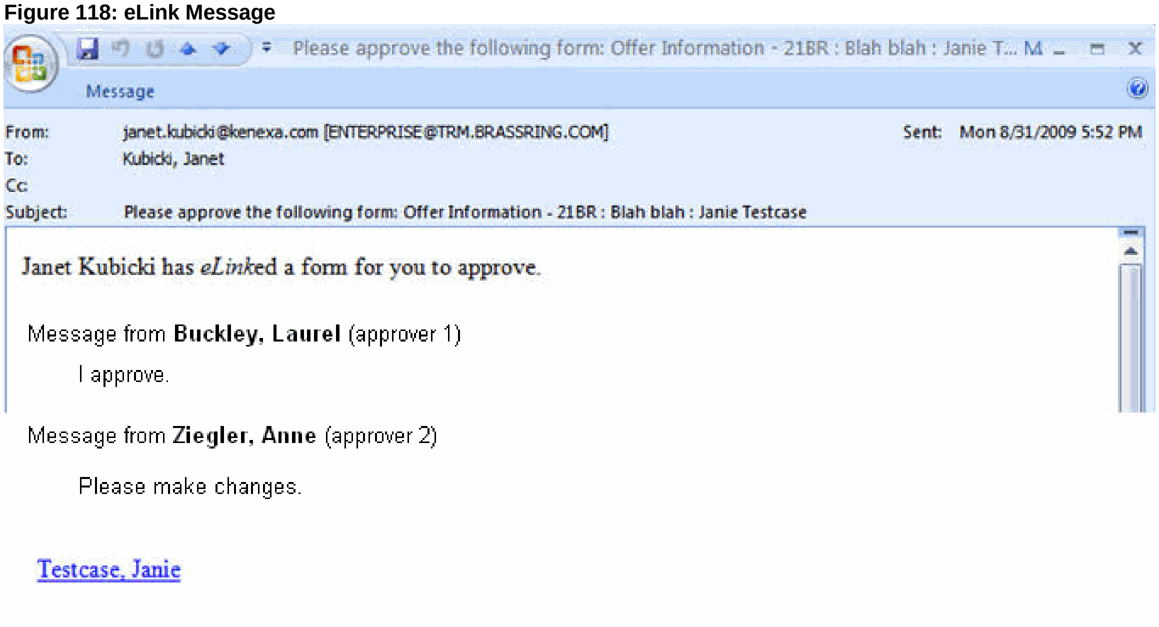
If you click **OK**, the form's approval status changes from **Approved** to **Pending**, and all approval statuses are erased.

The system then routes the form to the first pending approval on the list via eLink.

Cascading Approver Messages for Candidate Forms

When you select a Sequential Approval Process for candidate forms, you can elect to include and forward the approve/decline message of each subsequent approver to the next approver. The final approver sees all approver messages.

Figure 118: eLink Message



Business Rules for Cascading Approver Messages

When **Cascade approver messages** is enabled, eLink approval requests contain the full history of approver **Reasons for selection** in the approver order (as configured in Workbench).

If the approver is a non-system user, the approver's e-mail address is displayed instead of the approver's name.

All approvers (except those marked as **Bypass**) are listed in the cascade whether they entered a message or not.

Approvers who were marked as **Bypass** are not included in approval message tracking.

The message text, "*Message from … (approver #)*" is displayed in the same language the user sees when he or she clicks on the eLink.

Date Available

This feature is available for use in R12.2 Build 0.

US: November 19, 2009

EU: November 25, 2009

Cost

No additional cost.

How Do I Get this Feature?

Your Kenexa consultant or Certified Workbench user can configure this feature for candidate forms.

Benefits

KRB users users can easily see their colleagues' disposition of candidate forms as the form is being routed for approval.

How It Worked Before

Approvers did not have access to other approvers' messages. Before this enhancement, there was no Sequential Approval Process; therefore, approver messages were not displayed to other approvers.

Visible Changes

There are visible changes in Workbench. Please see the "*Configuration*" section for details.
There are no visible changes in KRB unless the setting is turned on.

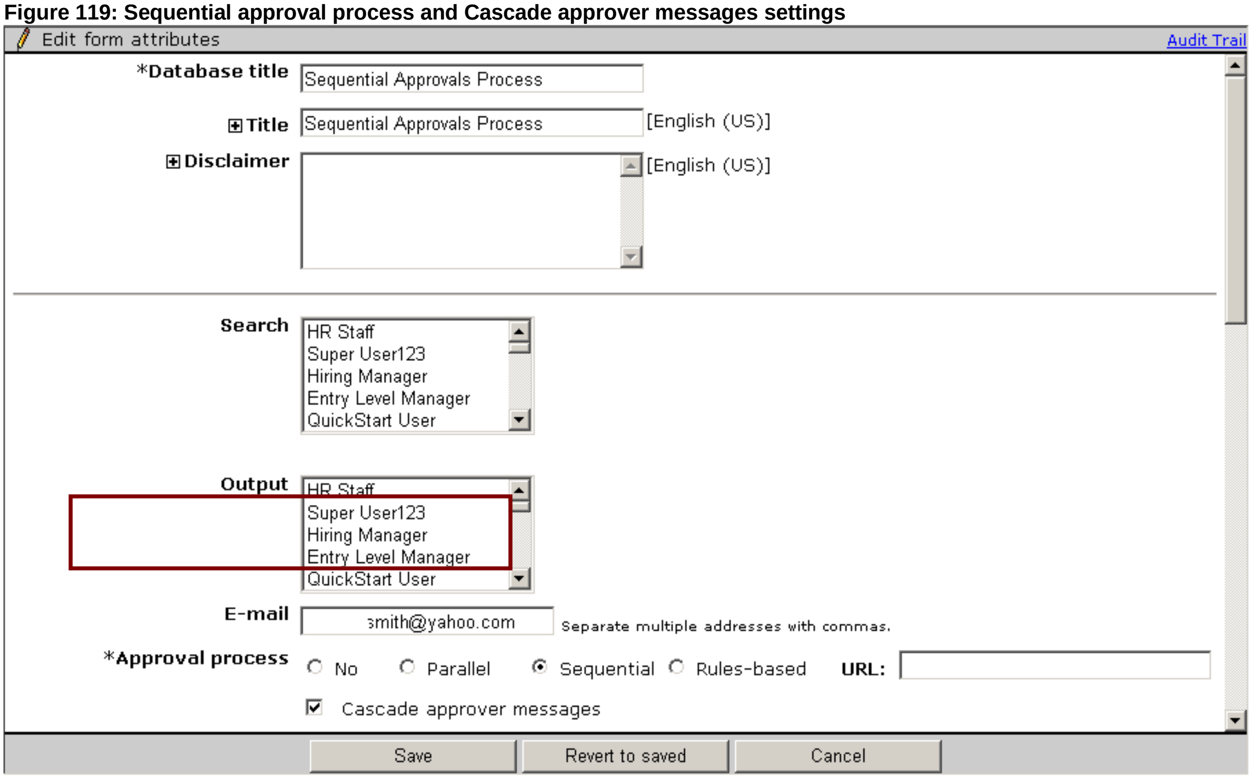
Configuration

You can use the Cascade Approver Messages feature only with the Sequential Approval Process (also new in R12.2; see page 118 for more information). You configure the two related settings on a form-by-form basis.

To enable the Cascade Approver Messages feature:

1. In Workbench, select **Tools > Forms > Candidate Forms > Add new candidate form | Edit form attributes**.
2. In the **Add candidate form** / **Edit form attributes** page, select **Sequential** for **Approval process** (if it is not already selected).
3. Check the checkbox **Cascade approver messages**.
4. Click **Save**.

Figure 119: Sequential approval process and Cascade approver messages settings



When the **Cascade approver messages** setting is checked, messages entered by each subsequent approver are stored and carried forward to the next approver within the candidate form approval e-mail notification.

You can uncheck the **Cascade approver message** setting for a candidate form at any time.
If the setting is never turned on, the messages are not tracked.

Cascading Approver Messages for Req Forms

You can configure your requisition approval process to include all approver comments as the requisition circulates to each approver. Approver comments are displayed in order in the Req approval eLink message, and on the **Req detail** tab.

Date Available

This feature is available for use in R12.2 Build 0.

US: November 19, 2009

EU: November 25, 2009

Cost

No additional cost.

How Do I Get this Feature?

Your Kenexa consultant or Certified Workbench user can configure individual Req forms (your organization's requisition templates) to cascade approver messages.

Benefits

Form approvers see all approver comments for previously completed approvals (or declinations).

How It Worked Before

When this setting is not enabled, KRB handles approval messages as it did in the past: the most recent approver's message displayed in the next approval request, but previous approvers' messages are dropped.

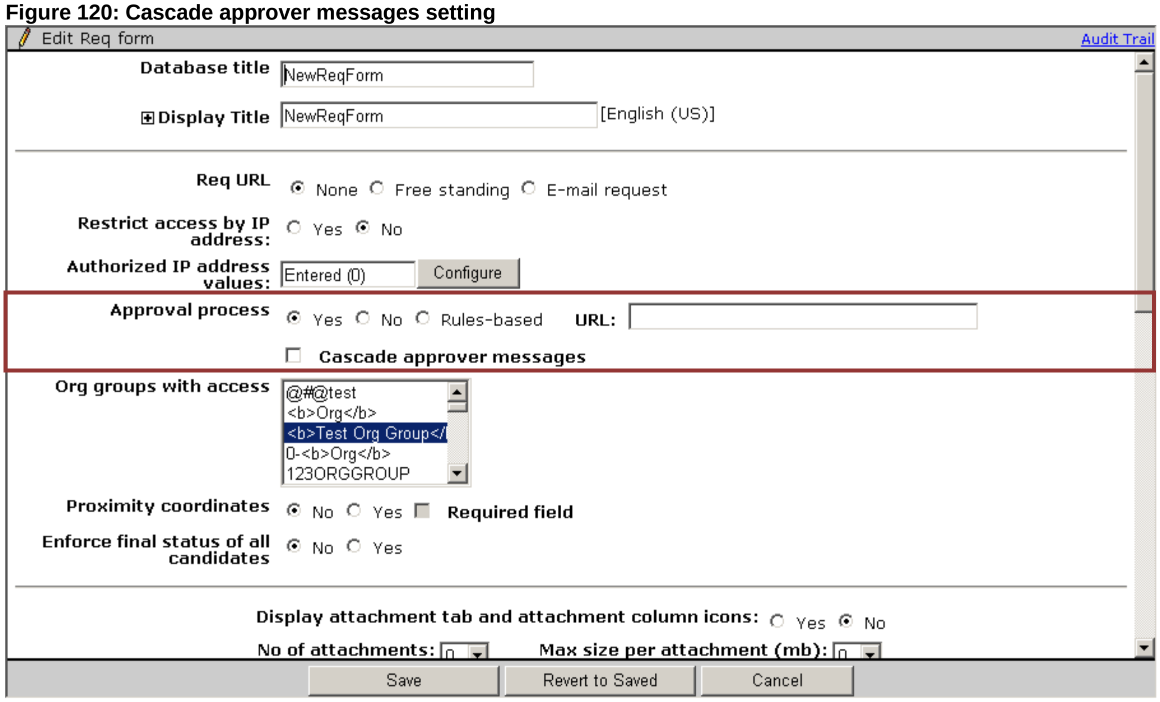
Visible Changes

There are visible changes in Workbench when configuring Req form attributes.

Configuration

To configure cascading approver messages on a Req form, navigate to the **Edit Req form** page in Workbench and set the **Approval process** field to **Yes** and check the **Cascade approver messages** check box.

Figure 120: Cascade approver messages setting



Publish Impact

The **Cascade approver messages** field is not published with Req and Candidate forms.

KRB User Experience

If the setting Cascade approver messages is enabled for a Req form, the designated KRB approvers see the complete history of approver messages in requisitions that are eLinked for approval and on the **Req detail** tab for the requisition.

- When the setting **Cascade approver messages** is enabled, the **Req detail** page and the eLink contain the full history of approver “Reasons for selection” in the approver order.

eLink Message

When **Cascade approver messages** is enabled:

- Approval requests by eLink contain the full history of approver messages (approve and decline), and not just the preceding approver. In the e-mail message, approvers are listed in the order of the approval flow.
- If the approver is a non-system user, the approver’s e-mail address is displayed instead of the approver’s name.
- All approvers (except those marked as **Bypass**) are listed in the cascade whether they entered a message or not.
- Approvers who were marked as **Bypass** are not included in approval message tracking.

Figure 121: eLink Message for Req Routing for Approval

From: laurel.buckley@kenexa.com [ENTERPRISE@TRM.BRASSRING.COM] Sent: Tue 9/22/2009 10:18 AM
To: Buckley, Laurel
Cc:
Subject: Req routing: Prod Manager approval test(601BR)

For your approval as **Recruiter**:

Title: Prod Manager approval test
Req ID: 601BR

Message from **Ziegler, Laurel** (approver 1):

I approve.

Message from **Buckley, Ann** (approver 2):

Please change cost center. I approve with that update.

View the req details

If you experience a problem with the link above, please copy and paste the following link into your browser:

https://trm.brassring.com/MobileApproval.UserInterface/ReqApproval.aspx?g=83EE141E29A849559E578C2DF391B3F6&c=AEuLhwg$b/wmeRmhnxPmVQ==

Figure 122: Example Decline Message

From: BrassRingReqStatusChangeEnterprise@trm.brassring.com
To: Buckley, Laurel
Cc:
Subject: 606BR: LB route 4 is Declined

606BR: LB route 4 is Declined

This notification has been sent to inform you that the status of this req has changed to Declined.

Message from **Buckley, Laurel** (approver 1)

I approve.

Message from **Ziegler, Anne** (approver 2)

Please make changes.

Message from **Laurel, Ziegler** (approver 3)

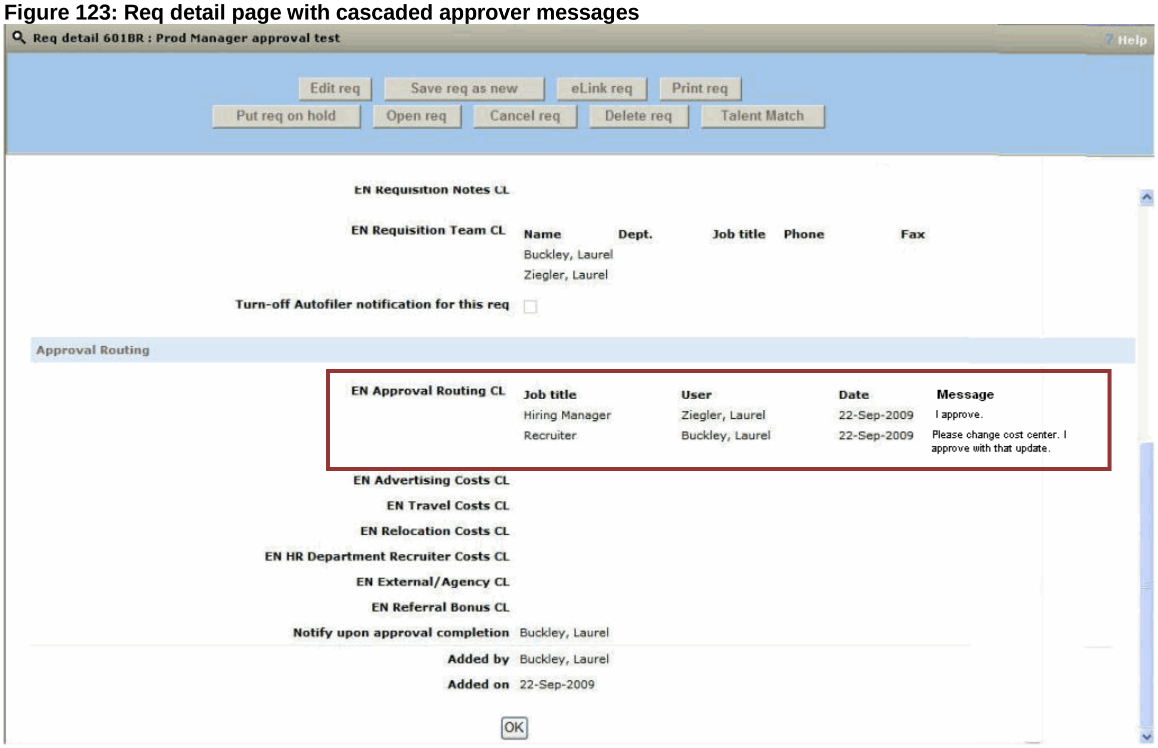
No way

View requisition details

Req Detail Page

When the setting **Cascade approver messages** is enabled, the **Req detail** page includes the message entered by the approver as shown in the figure below.

Figure 123: Req detail page with cascaded approver messages



Talent Gateways

Croatian TG

 As of Release 12.2, Talent Gateways are translated into Croatian.

How Do I Get this Feature?

Please contact your Kenexa consultant for information about purchasing additional Talent Gateway languages.

Serbian TG

 As of Release 12.2, Talent Gateways are translated into Serbian.

How Do I Get this Feature?

Please contact your Kenexa consultant for information about purchasing additional Talent Gateway languages. As of Release 12.2, Talent Gateways are translated into Croatian and Serbian.

Please see the "*Kenexa Recruiter BrassRing Supported Languages*" PDF file, included in the PDF package with this document.

Update HR Status Based on Candidate's Score

Users can now update a candidate's HR Status based on whether the candidate achieves a minimum required score on the Talent Gateway (TG) or Gateway Questionnaire (GQ). This update affects the postings for Talent Gateways with or without Gateway Questionnaires. In addition, the changes appear when KRB users create requisitions that use Job Code Default Data drawing from TG site questions data.

Date Available

This feature is available for use in R12.1 Build 3.

US: October 8, 2009

EU: October 14, 2009

Cost

No additional cost.

How Do I Get this Feature?

This feature is controlled by a new Talent Gateway details setting. Please contact your Kenexa consultant for help with this feature.

Benefits

KRB users do not have to manually look up a candidate's score and move the candidate to a new HR status.

How It Worked Before

KRB users had to look at the candidate's score and update the HR status manually.

Visible Changes

There are visible changes associated with this feature.

Regardless of whether this feature is turned on or not, all users will see some minor changes relating to it. Those changes include:

- The TG setting name "Always send hot candidate email" is renamed "Always send preferred candidate email." This setting is found in two places in Workbench:
  - Tools > Talent Gateways > Admin > Edit
  - Tools > Talent Gateways > Global > Global Admin > Edit GTG > Edit Member Site.
- Additionally, some items on the **Talent Gateway site questions** page are now grouped more logically:
  - "Featured job" checkbox appears as the first item below the question grid.
  - "Minimum score to administer assessment" appears just below "Highest possible score."

– A new section divider appears below the “Minimum score to administer assessment” with a section title “Preferred Candidate.” Within that section, three instances of “target score” now appear as “preferred candidate target score.”

Limitations and Known Issues

HR Statuses selected in this section, for passing or failing candidates, override their Insta-file HR status. That is, when this feature is enabled, the Req template Insta-file setting **Automatically file candidate to Req folder by HR Status through Insta-file** is ignored.

Best Practices

In the new column of the question grid at the top of the TG posting page, enter a required minimum score for individual questions if desired. The best practice is to enter a score only for questions for which specific answers are truly required.

Configuration

Please contact your Kenexa consultant for assistance with this feature.

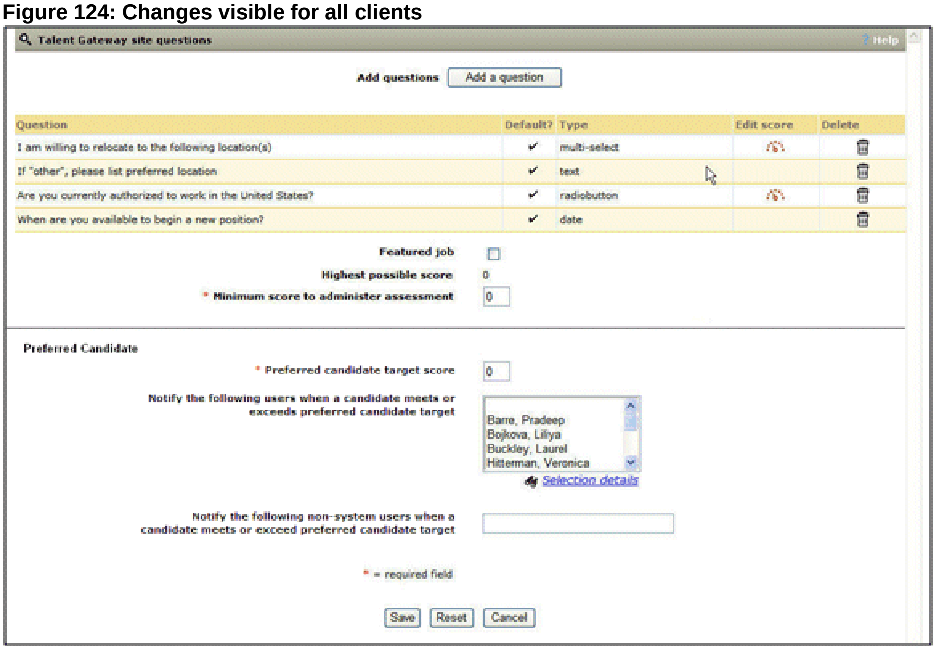
User Experience

To view the changes:

1. Navigate to a requisition.
2. Select Edit posting options > Edit site questions.

The figure below shows an example of these changes.

Figure 124: Changes visible for all clients



When the **Talent Gateway Score – Update HR Status** setting is activated for the Talent Gateway, users can select one HR Status when filing candidates with a passing score to the Req folder, and a different HR Status when filing candidates with a failing score to the Req folder.

To use the feature:

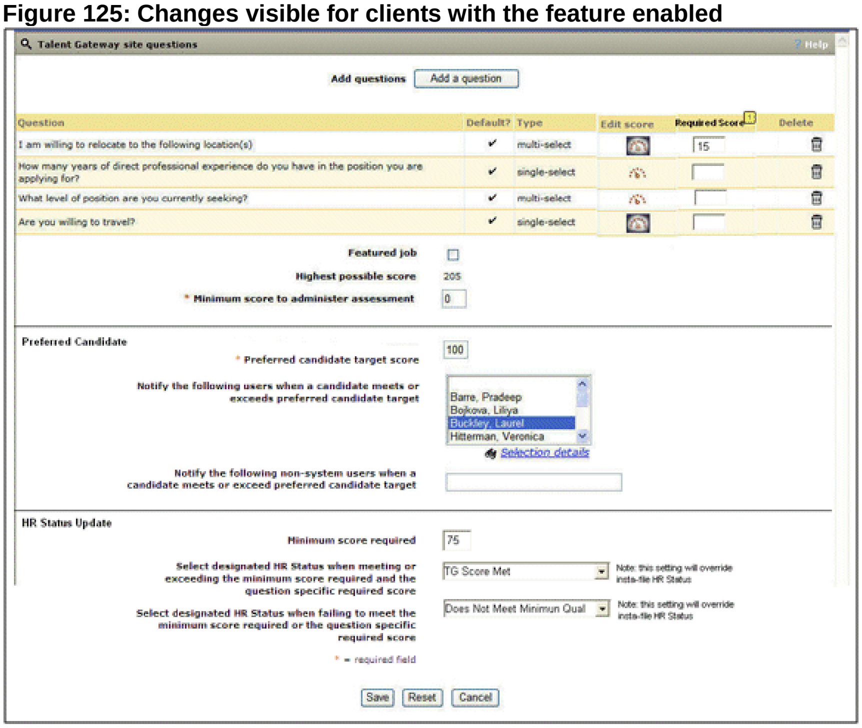
1. In the new column of the question grid at the top of the TG posting page, enter a required minimum score for individual questions if desired. The best practice is to enter a score only for questions for which specific answers are truly required.
2. In the new HR Status Update section that appears at the bottom of the page, enter a minimum total score required for the candidate to pass.
3. Select the HR Status with which you want passing candidates to be filed.

   The HR Status options include any HR Status the client is able to use after 0-filed. To pass, a candidate's total score must meet or exceed the minimum required score and the candidate must meet or exceed the specific score required for each question.

4. Select the HR Status with which you want failing candidates to be filed.

   To fail, a candidate's total score does not meet the minimum required score or the candidate does not meet the specific score required for any specific question. A failing candidate filed to the Req folder with the selected HR Status skips the 0-filed status altogether. If a candidate is already filed to the folder, the HR Status update is skipped unless candidate is currently at 0-filed.

Figure 125: Changes visible for clients with the feature enabled



The updated posting page will be available through Job Code Default Data as well as through the standard posting process.

Display Removal Date on Job Details Page

Your organization can display the date that a posting will be removed from the Talent Gateway on the **Job details** page. This feature is controlled by a Special configuration setting in Workbench. The **Removal Date** is the last field on the **Job details** page.

The "Removal Date" label is translated to the language of the current Talent Gateway locale. The Talent Gateway and localization settings determine the date display format. The format matches that of other date fields on the **Job details** page. Postings are removed from the Talent Gateway on the Removal Date at approximately 11:59 PM Eastern Time.

Date Available

This feature is available for use in R12.1 Build 3.

US: October 8, 2009

EU: October 14, 2009

Cost

No additional cost.

How Do I Get this Feature?

Please contact your Kenexa consultant for help with this feature.

Benefits

Candidates will know when a posting is due to be removed from a Talent Gateway.

How It Worked Before

The removal date did not appear on the Talent Gateway.

Visible Changes

There are no visible changes without configuration.

Configuration

Please contact your Kenexa consultant for help with this feature.

User Experience

When this feature is enabled, candidates can see the posting removal date at the bottom of the **Job details** page.

Figure 126: Removal Date displays at the bottom of the page

Education Lists Include High School Diploma/GED Value

For English – US locales, the value “High School Diploma/GED” is now available as a Degree option in Talent Gateways, Basic Talent Gateways, and Gateway Questionnaires.
A new option allows job-seekers to select the value **High School Diploma/GED** when completing or correcting the **Degree** field on Talent Gateways and Basic Talent Gateways with English – US locale.

When the option is enabled, Talent Gateway Profile imports will use the value **High School Diploma/GED**. The import function will map either “High school or equivalent” or “ged” to the new value for the TG Profile “Degree” field.

Graduation year (grad year field) will remain an optional field wherever it appears.

Date Available

This feature is available for use in R12.1 Build 2.

US: September 17, 2009

EU: September 23, 2009

Cost

No extra charge.

How Do I Get this Feature?

This feature is controlled by a new Talent Gateway details setting. Please contact your CSC for more information about enabling this feature.

Benefits

Using a standardized value provides more efficient and complete data collection, increases reporting accuracy, and is more convenient for job seekers and users entering information.

How It Worked Before

Candidates previously needed to choose ‘Other’ to account for this level of Education on Talent Gateways, Basic Talent Gateways, Gateway Questionnaires, and their TG Profiles.

Visible Changes

When the option is enabled, candidates will see the value High school diploma/GED on all Degree single select options lists on the English – US Talent Gateway(s) & Basic Talent Gateway(s).

No change occurs where the education Degree field is text entry:

- KRB
- All locales other than English – US
- Candidate import

- Agency Manager (adding a candidate)

Limitations and Known Issues

None

Best Practice Recommendations

Best practice is to enable this option for collecting US High school and GED information via Talent Gateways.

Migration Information

The new value will be stored in the database as HIGH SCHOOL DIPLOMA/GED for consistency with other Degree field values.

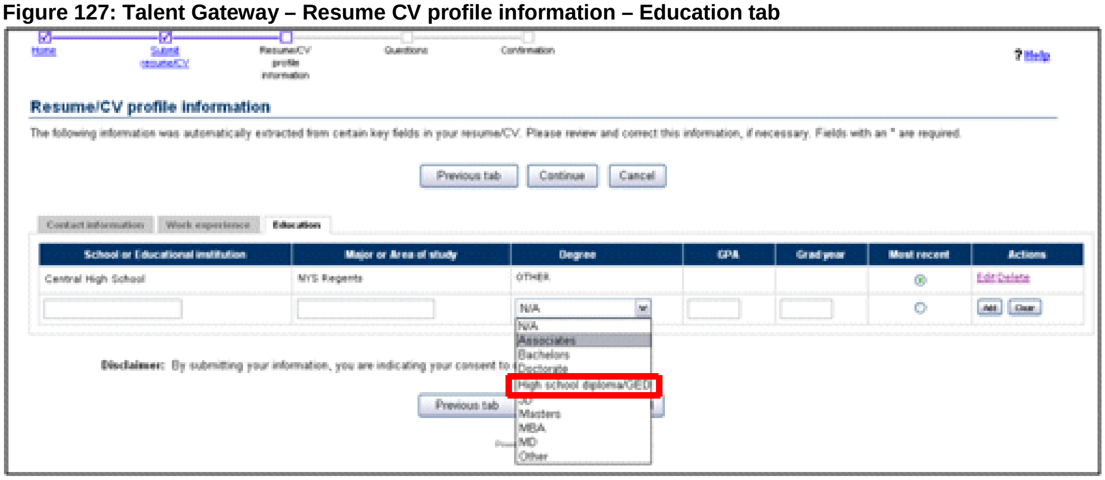
Configuration

Please contact your Kenexa consultant for help with this feature.

User Experience

Job-seekers can now select the value **High school diploma/GED** from Degree drop-down lists on all Talent Gateways or Basic Talent Gateways with English – US Locale. The value is available when they enter the information themselves, as well as when they correct information automatically extracted.

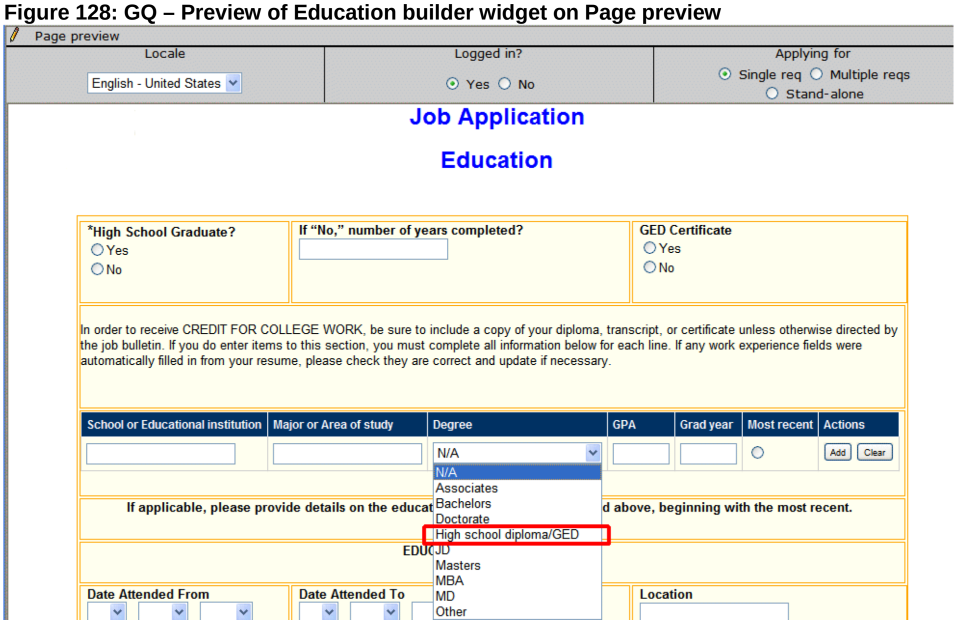
Figure 127: Talent Gateway – Resume CV profile information – Education tab



When completing a Gateway Questionnaire that includes an Education builder widget, job-seekers can now select the value **High school diploma/GED** from Degree drop-down lists.

Authorized Workbench users will see the new value when previewing a GQ that includes the Education builder widget, in the course of adding a GQ or updating a draft GQ. To preview it, select **Tools > Gateway Questionnaires** and click **Preview**, or click **View sections / pages**, select the section with the widget, and click **Preview page**. The resulting screen in shown in the figure below.

Figure 128: GQ – Preview of Education builder widget on Page preview



Require a GQ by Talent Gateway

Clients can elect to make the selection of a Gateway Questionnaire required in the KRB **Posting options** window. For example, Recruiters who are posting jobs to localized Talent Gateways must select the corrrect Gateway Questionnaire for each language in order to post successfully.

This capability is controlled by a new posting dependency setting which is configured at the Talent Gateway or Global Talent Gateway level. It is available for Employee Referral Gateways as well.

Date Available

This feature is available for use in R12.1 Build 4.

US: October 29, 2009

EU: November 4, 2009

Cost

No additional cost.

How Do I Get this Feature?

Please contact your Kenexa consultant for assistance with this feature.

Benefits

Your organization can make the selection of a GQ required when KRB users are posting a requisition to a Talent Gateway.

For example, you may be required post certain kind of jobs on a designated Talent Gateway and ask candidates specific questions (using a Gateway Questionnaire) related to that job. This posting dependency setting helps you to do that.

How It Worked Before

Before this enhancement (and when the new client setting is not enabled) the KRB user can select a Talent Gateway on the **Edit posting options** page and click **OK** to edit site questions (if they are present) and post successfully without selecting a Gateway Questionnaire from the dropdown list. Once the KRB user leaves the posting page, the connection of that requisition to that Talent Gateway's GQ is lost.

Visible Changes

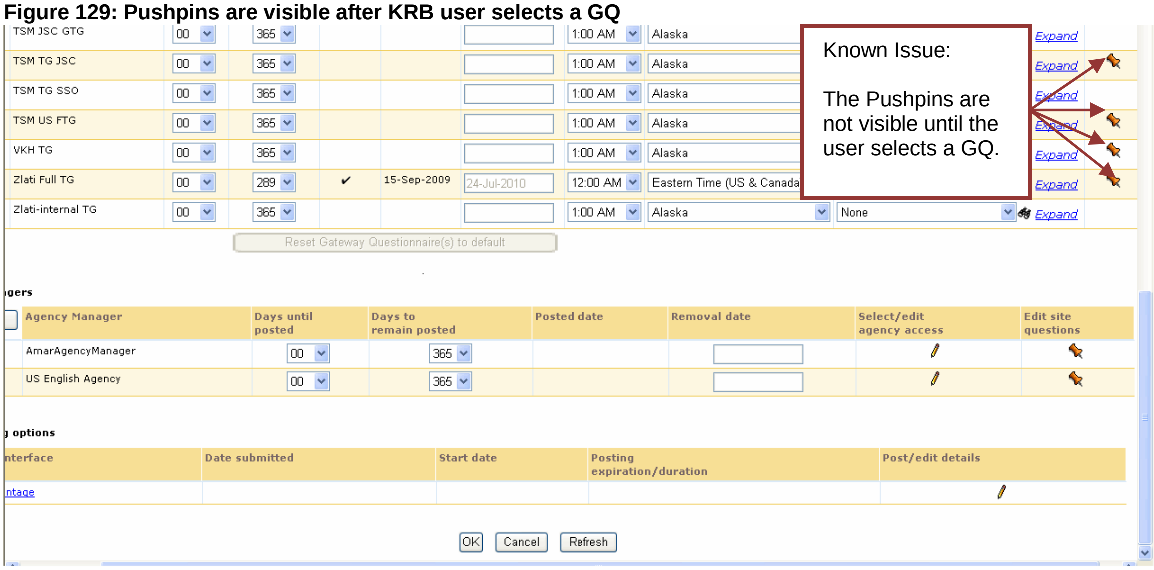
There are no visible changes for this feature.

Limitations and Known Issues

In the GQ and TG site questions scenario, when the new setting is enabled for the Talent Gateway, the Recruiter must select the GQ first. He or she can then go on to edit TG site questions if necessary.

The **Edit site questions** pushpin does not display until the user selects a Gateway Questionnaire. Once the Recruiter selects the Gateway Questionnaire, the **Edit site question** pushpin and then the Recruiter can continue onto the **Edit site questions** page.

Figure 129: Pushpins are visible after KRB user selects a GQ



Configuration

Please contact your Kenexa consultant for help with this feature. Once it is enabled, KRB users cannot successfully post the requisition without selecting a Gateway Questionnaire.

User Experience

Your Talent Gateways might have a Gateway Questionnaire (GQ-only) or both a Gateway Questionnaire and TG Site Questions.

In the GQ-only scenario, when the new setting (**Do not allow posting without GQ selected**) is enabled for the TG, the Recruiter must select a GQ; if he or she does not, KRB displays an appropriate error message.

Figure 130: Clicking OK to post without selecting a GQ (when the GQ is required)

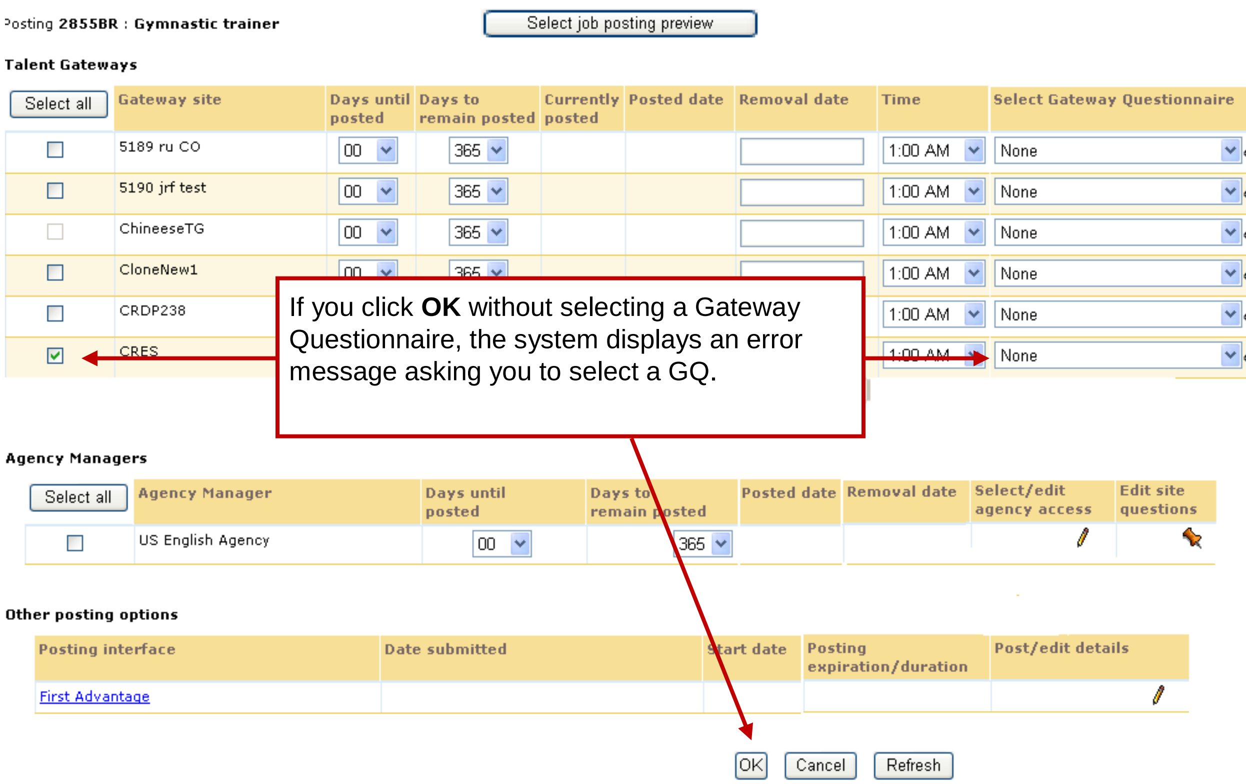
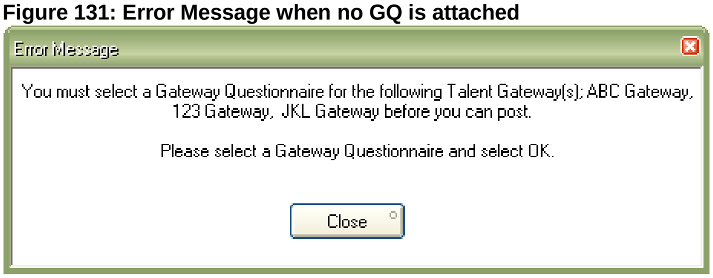


Figure 131: Error Message when no GQ is attached



In the GQ and TG site questions scenario, when the new setting is enabled for the Talent Gateway, the Recruiter must select the GQ first. He or she can then go on to edit TG site questions if necessary.

Figure 132: Talent Gateway with Site Questions disabled

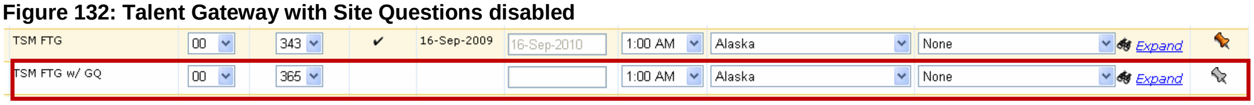
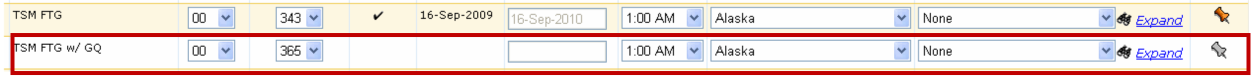


Figure 157 shows a TG with no GQ selected and a disabled pushpin icon in the TG Site Question column.

Figure 133: Talent Gateway with Site Questions disabled



Customizable Navigation Text

Clients can add custom text (Including HTML) to the navigation section of the Gateway Questionnaire. The custom text field provides a means of creating a visual section divider along with presenting tailored instructions to candidates.

Date Available

This feature is available for use in R12 Build 1.

US: August 27, 2009

EU: September 2, 2009

Cost

There is no additional cost associated with this feature.

How Do I Get this Feature?

Your Kenexa consultant or Certified Workbench user can configure this feature in Workbench.

Benefits

This enhancement provides a better, more accurate candidate experience.

How It Worked Before

When multiple fields and questions were presented on a single Gateway Questionnaire page, the text could run below the navigation buttons making it difficult for the end-user to realize they must scroll to view the full page.

Visible Changes

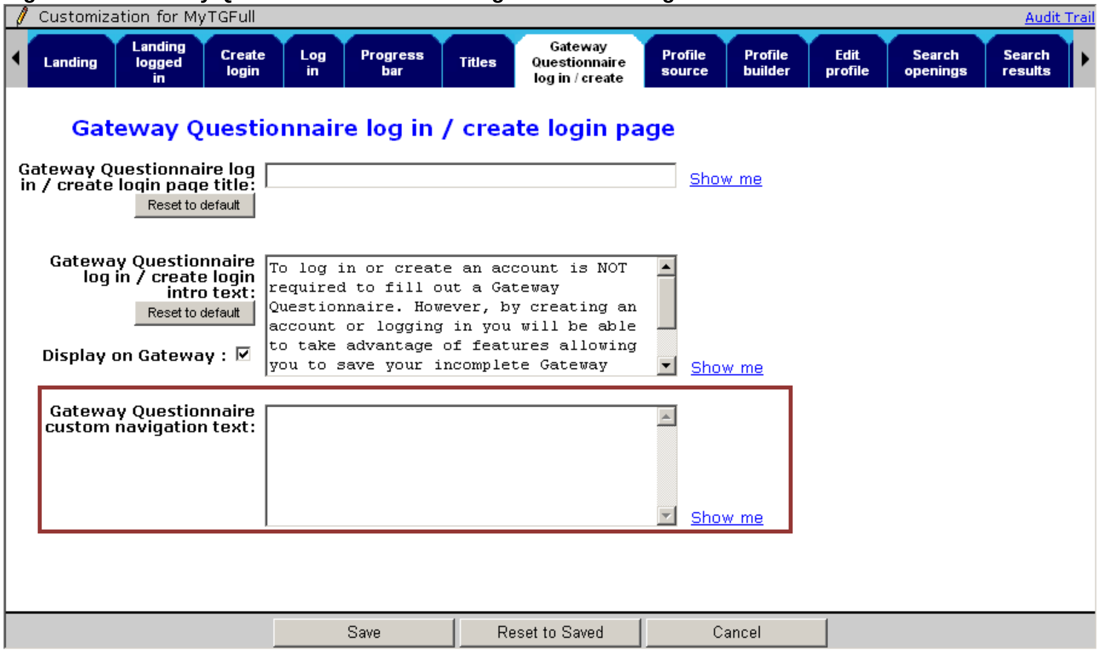
There is a visible change in Workbench for Certified Workbench users.

Workbench Configuration

To configure custom text for GQ navigation:

1. Select **Tools > Talent Gateways > Text customization**.
2. Select the **Gateway Questionnaire log in / create** tab.

Figure 134: Gateway Questionnaire custom navigation text setting

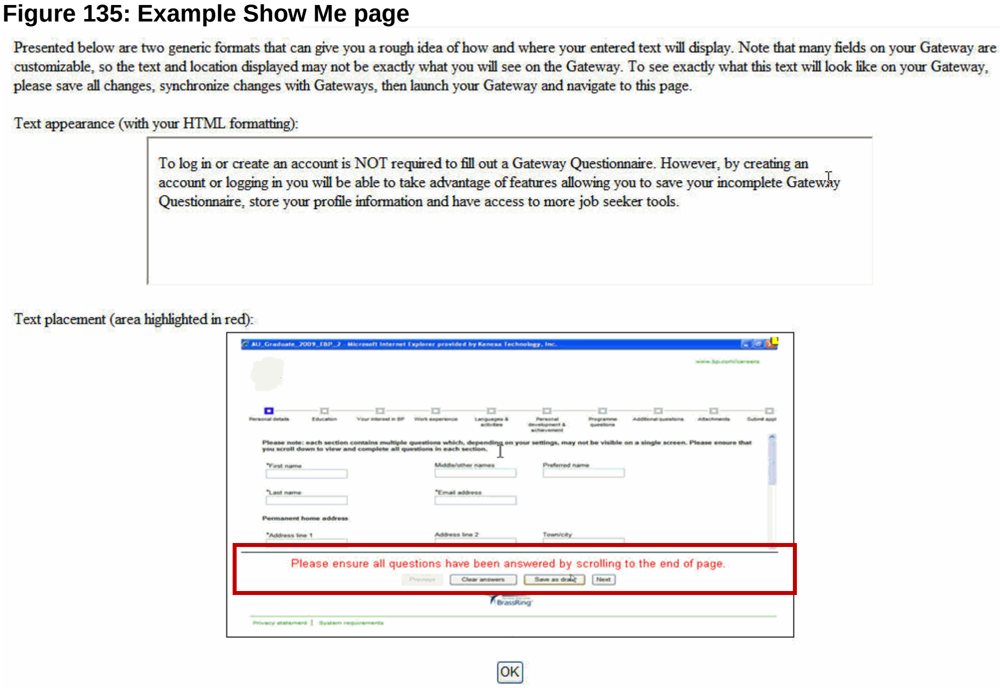


3. Enter up to 4000 characters of customized text, including HTML, in the Gateway Questionnaire custom navigation text field. See the examples of customized text on page **Error! Bookmark not defined.**.

   The text entered here is displayed the full width of the window on the associated Gateway Questionnaire above the navigation buttons.

4. Click Show me to highlight where the customized text / HTML will appear.

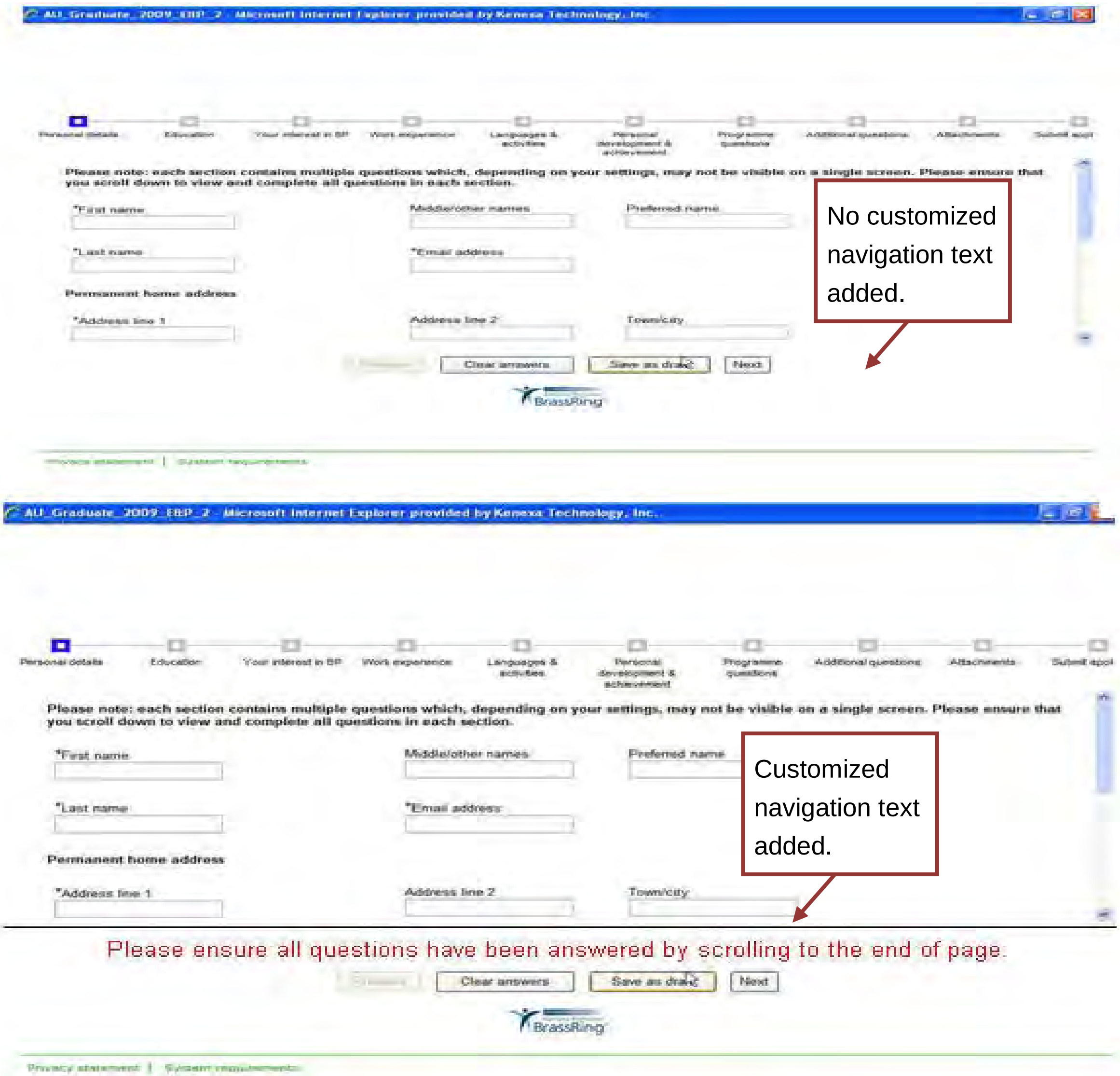
Figure 135: Example Show Me page



5. Click **Save** when you are finished.

User Experience

Figure 136: Before and after view of GQ



Customizable Title Text on GQ Login Page

Your organization can customize title text displayed on the login page for Gateway Questionnaires (GQs). This affects the GQ login/create login page for both candidates and Workbench users creating GQs.

Date Available

This feature is available for use in R12.1 Build 2.

US: September 17, 2009

EU: September 23, 2009

Cost

There is no additional cost associated with this feature.

How Do I Get this Feature?

Your Kenexa consultant or Certified Workbench user can customize the GQ login page title text.

Benefits

Your organization can entitle a GQs using familiar terminology.

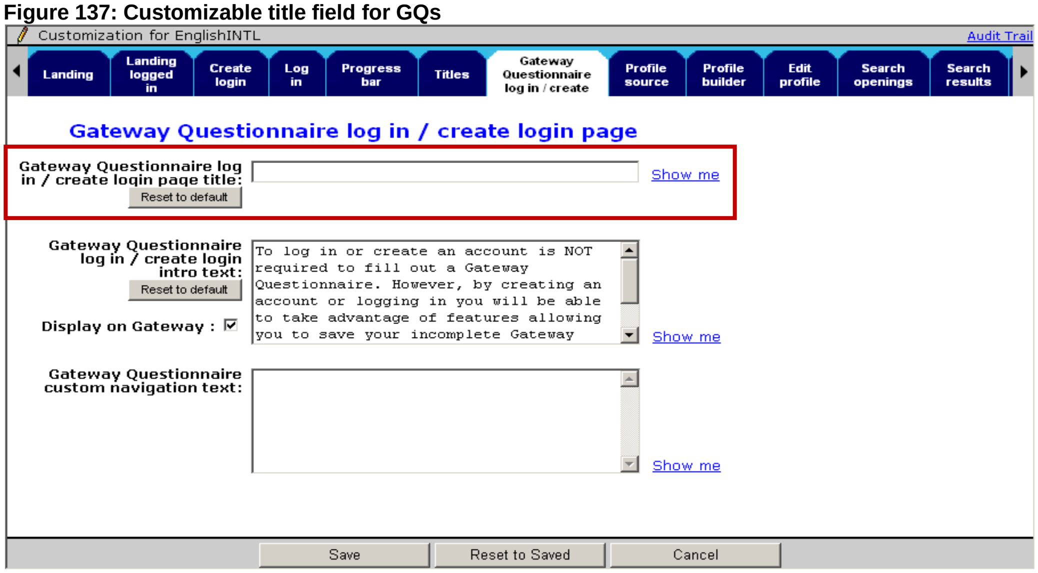
How It Worked Before

The title text was not customizable.

Visible Changes

There is a visible change in Workbench for Certified Workbench users.

Figure 137: Customizable title field for GQs

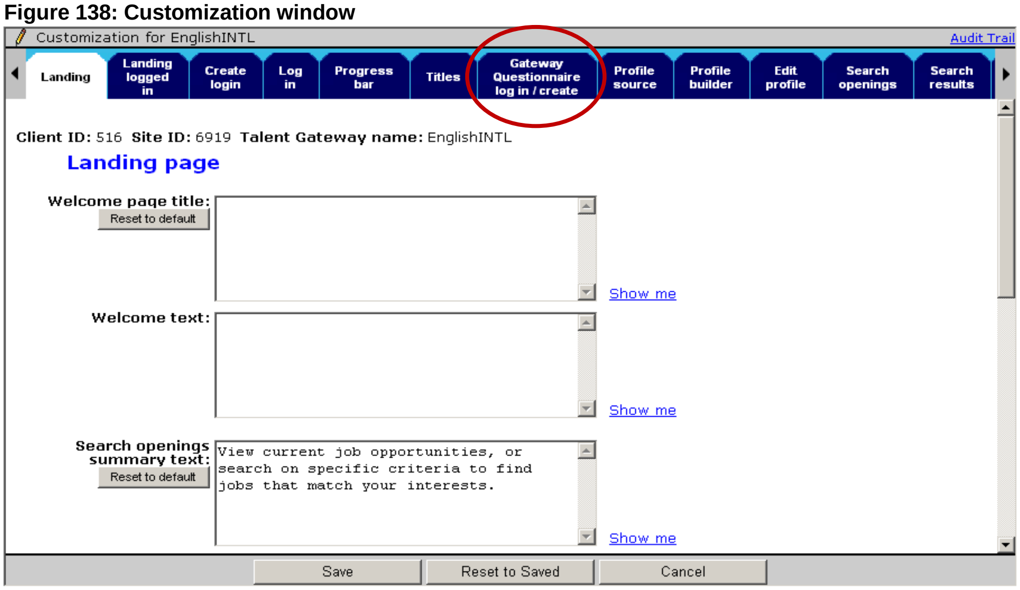


Configuration

To customize title text for a GQ login/create login page:

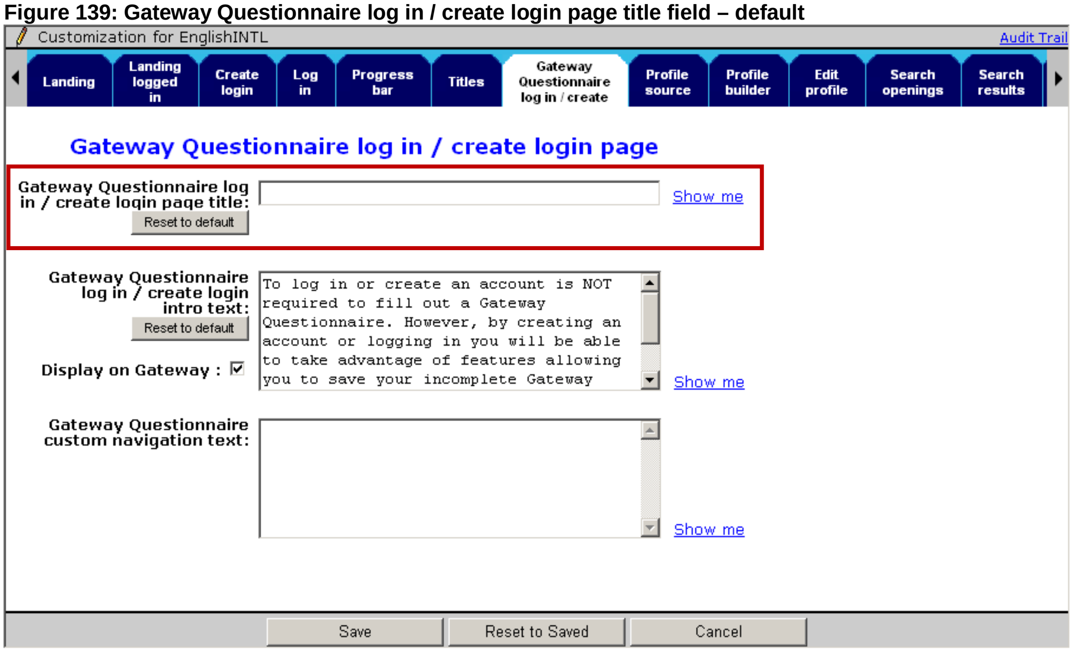
1. Select **Tools > Talent Gateways > Text customization**.
2. Click the edit icon for the Talent Gateway whose GQ title text you want to customize.

Figure 138: Customization window



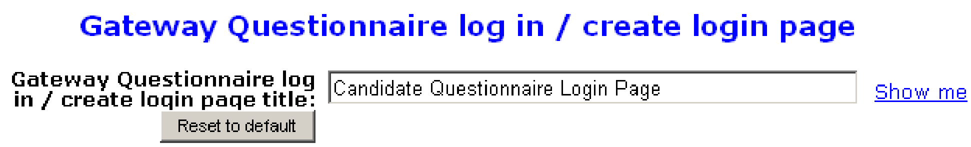
3. In the **Customization** window, select the **Gateway Questionnaire log in/create** tab.

Figure 139: Gateway Questionnaire log in / create login page title field – default



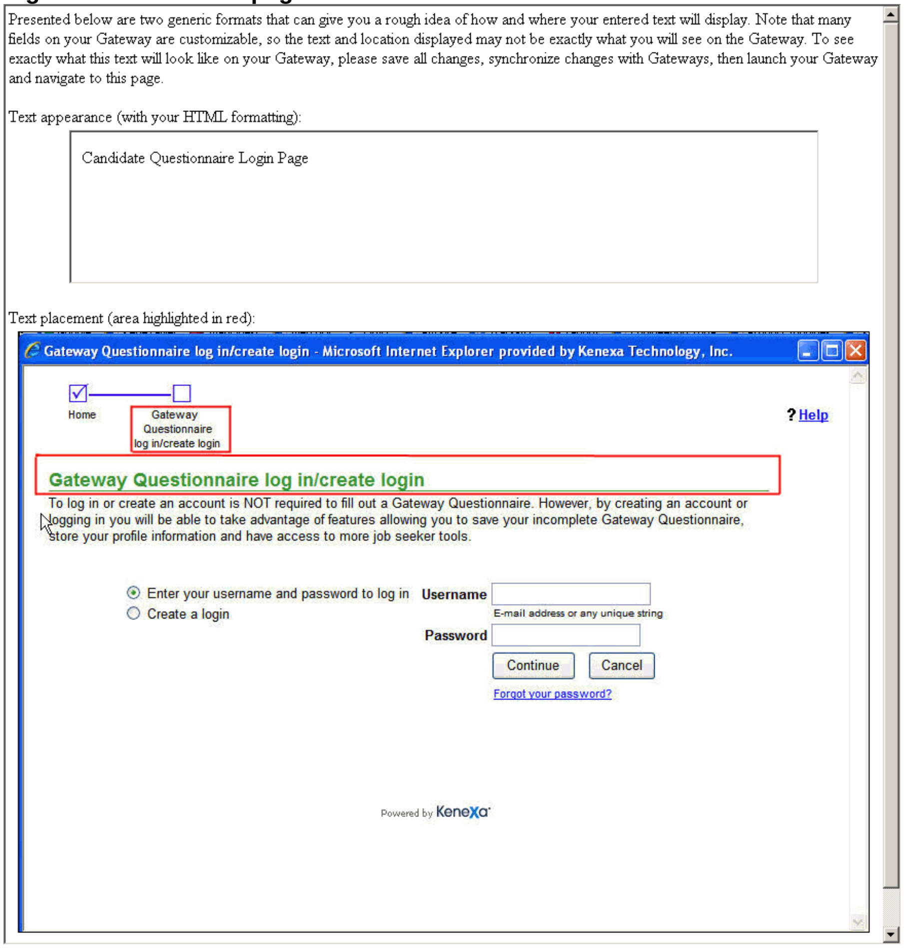
4. Enter the customized title in the **Gateway Questionnaire log in / create login page title** field.
5. Enter up to 50 characters.
6. The field supports HTML. The text you enter inherits the look/feel of existing title text as defined by your organization through existing customization settings.

Figure 140: Customized title



7. Click **Show me** to display the results. This text replaces the default text in three places:
   - In the browser window title bar
   - On the GQ login title/header
   - In the progress/navigation bar

Figure 141: Show me page with customized text

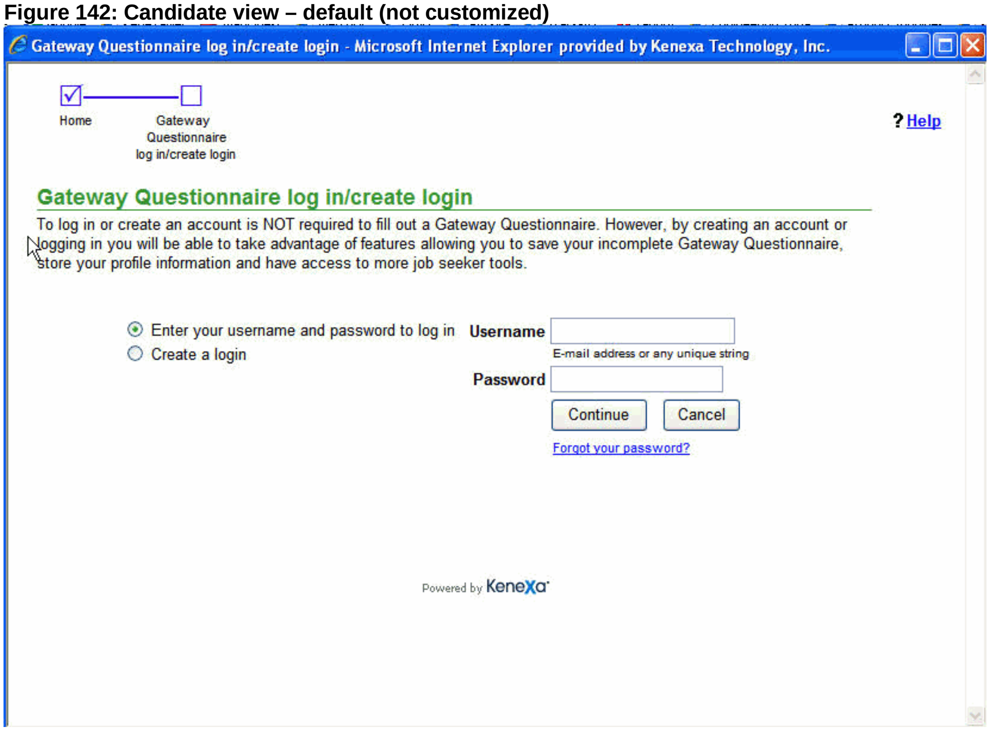


8. Close the **Show me** window.
9. Back on the **Gateway Questionnaire login / create login tab**, click **Save** when you are finished entering the customized text. Otherwise, to restore the default text, click **Reset to default**. The default text “Gateway Questionnaire log in/create login” populates the text field.

User Experience

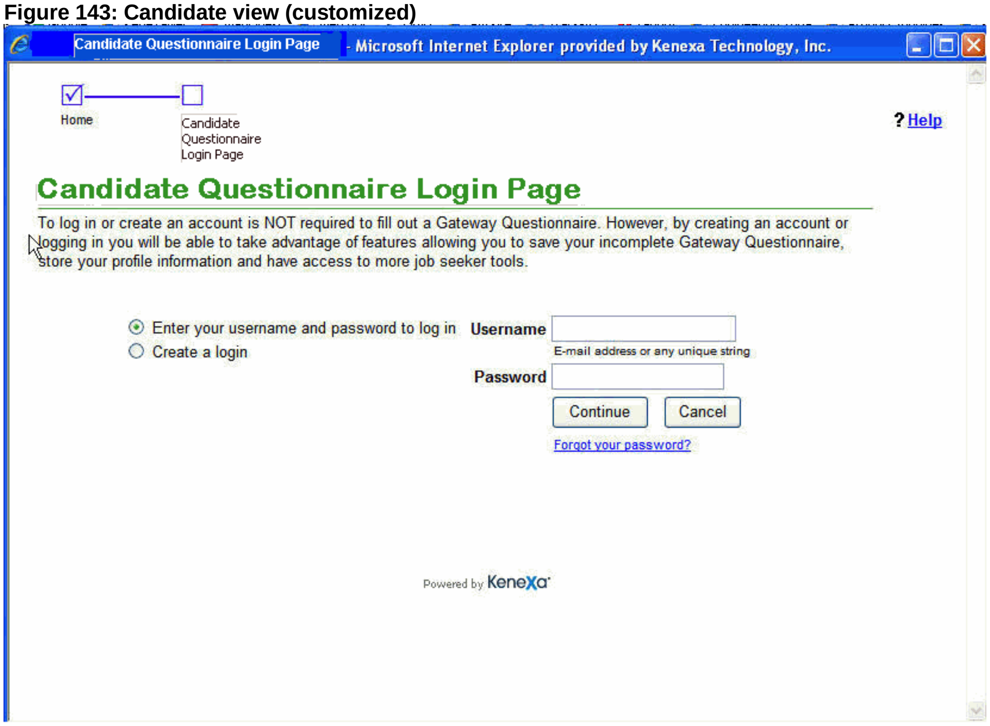
If the title text for the GQ log in/create login page title is not customized, candidates see the following:

Figure 142: Candidate view – default (not customized)



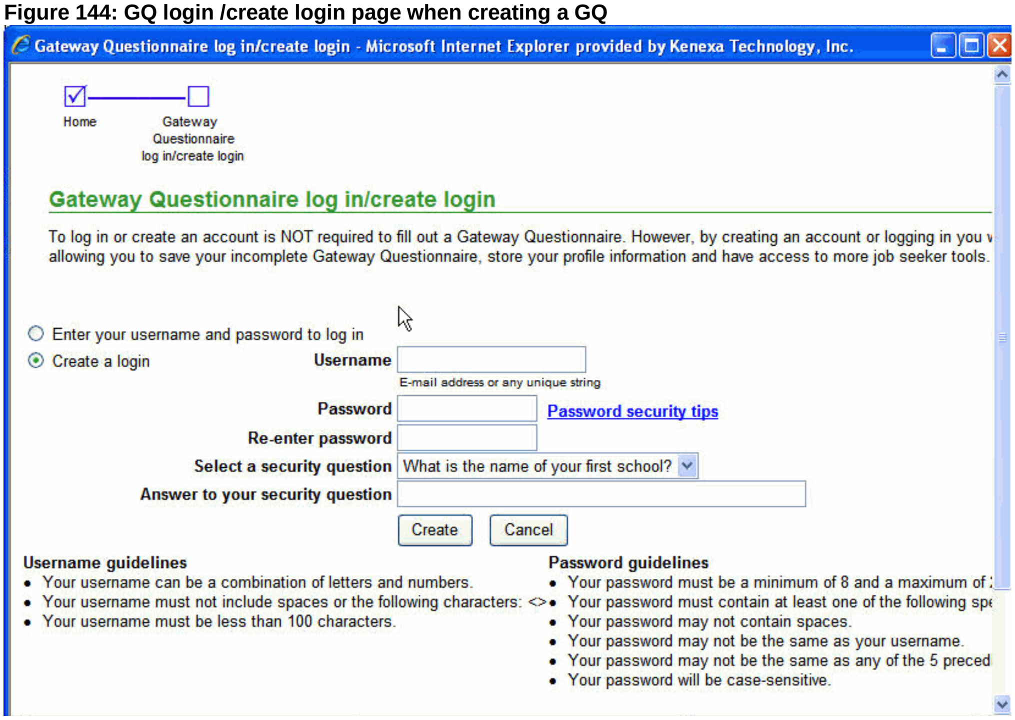
When the text for the GQ log in/create login page title is customized, candidates see the customized text, as in the following example:

Figure 143: Candidate view (customized)



Workbench users see either the default title or the customized title on the **Gateway Questionnaire log in/create login** page when they are logging in to create a GQ. Figure 168 displays the default text on that page.

Figure 144: GQ login /create login page when creating a GQ



GQs are Refreshed for Subsequent Job Applications

Some organizations would like to have candidates fill out a fresh Gateway Questionnaire as part of each application workflow.

In the R11 project "*Per Req forms posted to Talent Gateway with Defaults*," this feature was designed to pre-fill and store the candidate's responses. When a candidate completed the per req form, the information collected from the most recent submission was displayed for the candidate's review regardless of which requisition it was completed for.

Date Available

This feature is available for configuration in R12.2 Build 0.

US: November 19, 2009

EU: November 25, 2009

Cost

No additional cost.

How Do I Get this Feature

Please contact your Kenexa consultant for help with this feature.

Benefits

Your organization can elect to have refreshed GQs presented with no question responses stored from previous applications.

How It Worked Before

Talent Gateways always tried to pre-populate Gateway Questionnaires based on the previous submission.

For example, when a candidate went through a Gateway Questionnaire and answered form questions, their responses appeared the next time they applied to a position using the same Gateway Questionnaire. This would happen even if the questions are pulling from a single per candidate per req form.

How It Works Now

With this new Workbench Gateway setting enabled, a candidate who applies to more than one requisition is presented each time with questions without responses. Candidates must fill out the specific required questions each time they apply. Only the profile information (name, address, work experience, and so forth) is retained.

Visible Changes

No visible changes.

Limitations and Known Issues

This project does not extend to:

- Talent Gateways
- Agency Manager
- Profile Mover (R11.5 feature)

Configuration

Please contact your Kenexa consultant for help with this feature.

User Experience

Gateway Workflows

Scenario 1: Full Talent Gateway with Gateway Questionnaire forms attached workflow

First application:

1. The candidate selects position and clicks **Submit to Job**
2. The candidate uploads or cuts & pastes resume, or completes the profile fields.
3. The candidate completes Talent Gateway questions.
4. The Gateway Questionnaire attached form displays.
5. The candidate completes form and submits it.

Subsequent application:

1. The candidate selects different position and clicks Submit to Job.
2. The candidate uploads/cuts & pastes resume (profile information already present).
3. The Gateway Questionnaire attached form displays without previous responses.
4. The candidate has to provide responses to required questions.
5. The candidate reviews the form and submits to new job.

Scenario 2: Auto-launch Gateway Questionnaire with forms attached workflow

This functionality is for Full Talent Gateways:

1. The candidate is sent the Talent Gateway URL link via e-mail.
2. Once the candidate clicks on the link the Gateway Questionnaire launches automatically.
3. The launched Gateway Questionnaire works the way other Gateway Questionnaires work.
4. The candidate completes the Gateway Questionnaire attached form questions and submits the application.
5. The candidate sees a confirmation message.

Subsequent applications:

1. The candidate receives an e-mail containing the link to the Talent Gateway URL.
2. Clicking the link launches the Gateway Questionnaire automatically.

3. The Gateway Questionnaire attached form displays without previous responses.
4. The candidate completes the questions and submits.
5. The candidate sees a confirmation message.

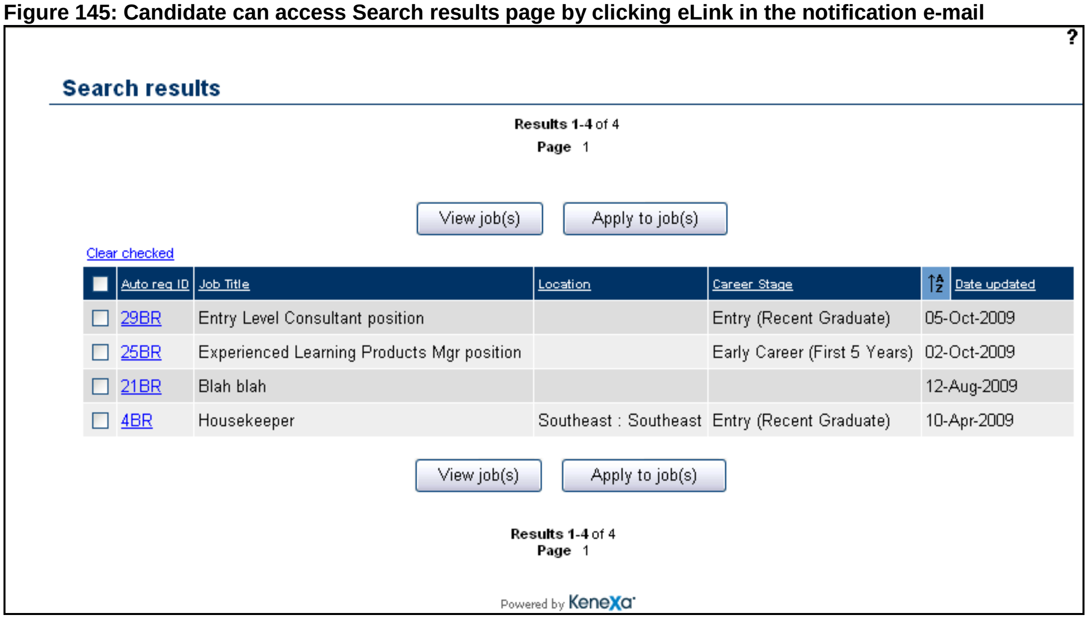
Business Rules

- The behavior described above applies to Gateway Questionnaire response forms only.
- Each submission is stored with the each response form.
- No user can change the responses once the form has been submitted.
- Nothing will change in the setup and/or configuration of form questions on a Gateway Questionnaire.
- The “Disable Gateway Questionnaire pre-filled responses” setting applies only to new Gateway Questionnaire response forms that are generated after the setting has been enabled.
- Once the new setting is enabled, if you want to apply the functionality to a posted requisition, you must first un-post the requisition, save it, and then repost it.

Employee Referral Gateways: Search Results

Referred candidates receive an e-mail notification informing them that they have been referred by an employee to one or more jobs. With this enhancement, clients can configure the employee referral system so that when referred candidates click the eLink in the e-mail notification, the **Search results** page launches. The **Search results** page lists the jobs to which the candidate was referred (as long as the jobs are still listed on the designated Talent Gateway). Candidates can view job(s) and complete the application process if desired.

Figure 145: Candidate can access Search results page by clicking eLink in the notification e-mail



Business Rules

When the referred candidate clicks the eLink in the e-mail notification, he or she is directed to the **Search results** page of the Referred candidate eLink designated Talent Gateway. The candidate must accept the data privacy policy (if one is configured for the site).

All jobs to which the referring employee referred the candidates that are posted on the destination Talent Gateway are listed on the **Search results** page.

If there are no jobs posted on the destination Talent Gateway to which the candidate was referred , the following text displays on the Talent Gateway: “The job(s) that you were sent are not available at this time.” The potential candidate can click Close to close the search results page

Date Available

This feature is available in R12.2 Build 0.

US: November 19, 2009

EU: November 25, 2009

Cost

No additional cost.

How Do I Get this Feature?

Please contact your Kenexa consultant for help with this feature.

Benefits

When this feature is configured for an Employee Referral Gateway, candidates experience a continuous workflow for viewing and applying to the job(s) to which they have been referred.

How It Worked Before

Under one configuration option, candidates could see a job description but could not go on to apply to the job directly from that description.

Visible Changes

No visible changes.

Details, Limitations, and Known Issues

The **Search results** page inherits the configured UI attributes of the Talent Gateway (colors, fonts, and so forth), and your organization's branding.

The Search results page does not include the following functions so that candidates are permitted to only apply to those positions in which they were referred:

- Progress bar
- Your search criteria <search criteria>
- Refine search
- Create search agent
- Save to cart
- Send to friend

eLink Behavior

The link in the Referred candidate e-mail that is the text between [QUESTIONSLINKSTART] and the [QUESTIONSLINKEND] tokens remains active until the eLink expiration configured in the client settings.

Here is the full text within that configuration screen:

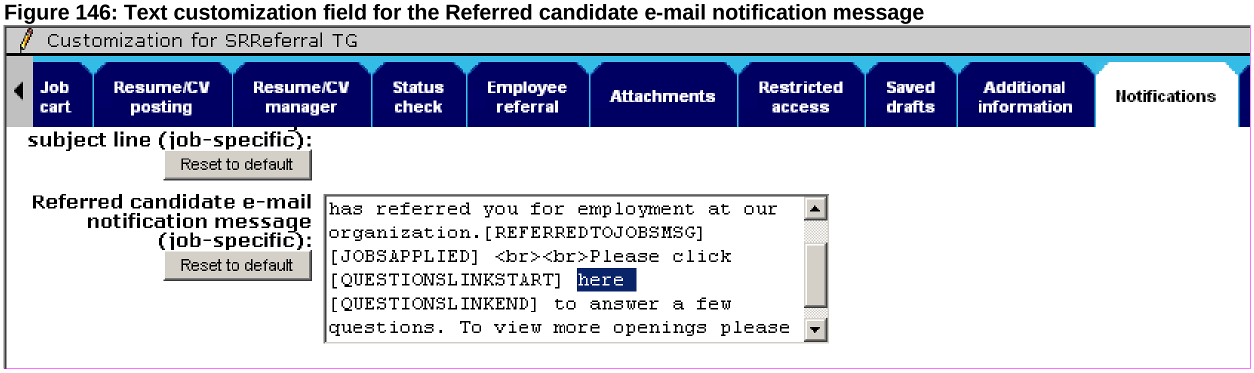
> Hi [FIRSTNAME] [LASTNAME],

[REFERRERFIRSTNAME] [REFERRERLASTNAME] has referred you for employment at our organization.[REFERREDTOJOBSMSG][JOBSAPPLIED]

Please click **[QUESTIONSLINKSTART]** **here** **[QUESTIONSLINKEND]** to answer a few questions. To view more openings please visit us at CLIENT TG URL HERE

Here is a screen capture of the text customization field in Workbench:

Figure 146: Text customization field for the Referred candidate e-mail notification message



Jobless Referrals

This enhancement does not affect candidates who are “jobless” referrals (employees referred them to the company but not to specific jobs).

More than One Submission During the Same Session

When a referred candidate completes the submission to job(s), clicks the **Continue** button on the **Confirmation** screen, and submits to job(s) again, the two separates submissions appear as independent job referrals in KRB. However, when a referred candidate completes a submission to multiple jobs simultaneously, then the submissions will appear together in the job referrals in KRB.

Best Practice Recommendations

When the **Referred candidate eLink start page** = **Search results**, Workbench users should not configure **[Joblinks]** and **[Joblinkstext]** in the **Referred candidate e-mail notification message (job-specific)** field.

When the **Referred candidate eLink start page = Search results & [Joblinks]/[Joblinkstext]** token, Workbench users should configure **[Joblinks]** and [**Joblinkstext]** in the **Referred candidate e-mail notification message (job-specific)** field.

If you configure the workflow to take the candidate to the list of jobs on the **Search results** page (as described for the second method just above), Kenexa suggests that your organization change the **Referred candidate e-mail notification message (job-specific)** text indicating clearly that the candidate is directed to the list of jobs to which he or she was referred.

Please see Workbench Online Help (accessed from the Help link in Workbench) for more information about this text customization field for Referral Talent Gateways.

Configuration

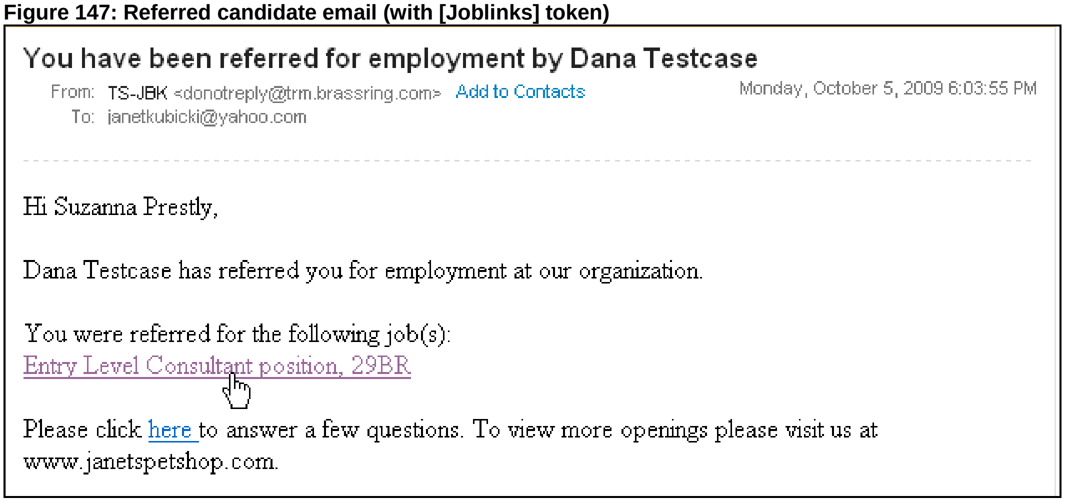
Please contact your Kenexa consultant for help with this feature.

Referred Candidate’s Experience

This section describes the referred candidate’s experience for Employee Referral Gateways that are configured to take the candidate to the **Search results** page with the **Apply to job(s)** button.

1. The referred candidate receives the e-mail about the referral.

Figure 147: Referred candidate email (with [Joblinks] token)



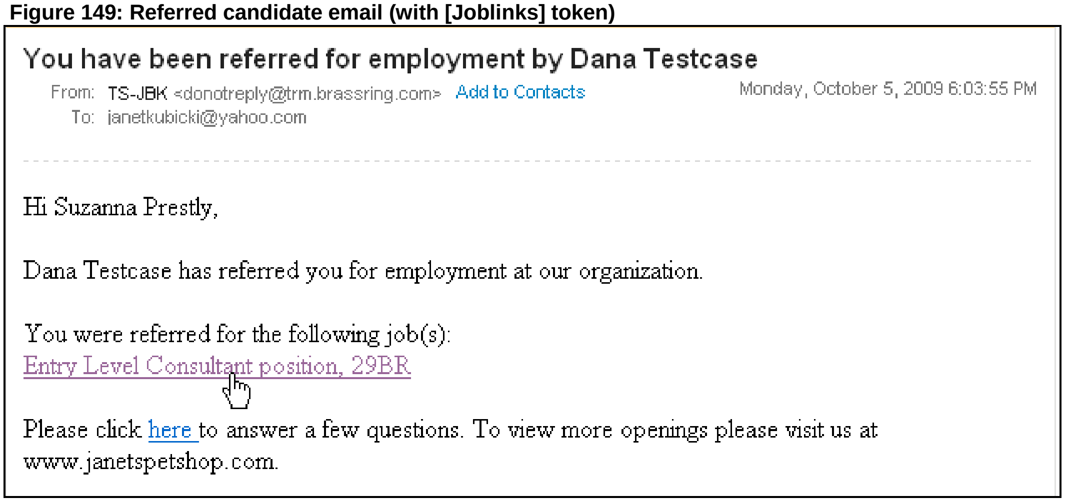
He or she clicks a/the job link. The **Job details** page for that job displays.

Figure 148: Job details page when accessed by [Joblinks] token

The Candidate closes the **Job details** window OR returns to the e-mail.

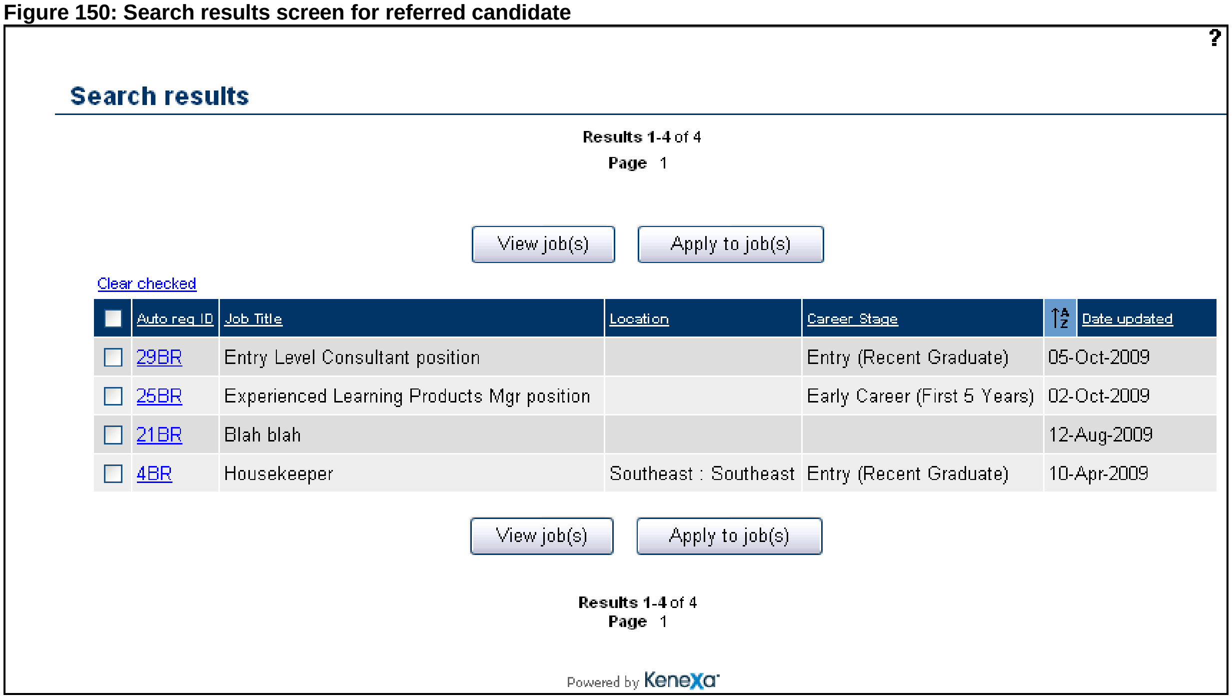
The Candidate then clicks on the text between **[QUESTIONSLINKSTART]** and **[QUESTIONSLINKEND]** tokens.

Figure 149: Referred candidate email (with [Joblinks] token)



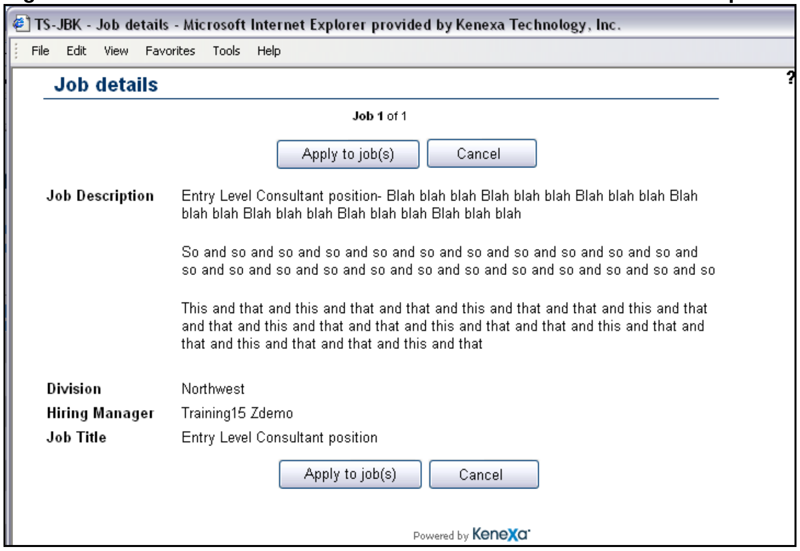
The destination Talent Gateway's **Search results** page displays, listing all jobs to which the candidate was referred by the referring employee.

Figure 150: Search results screen for referred candidate



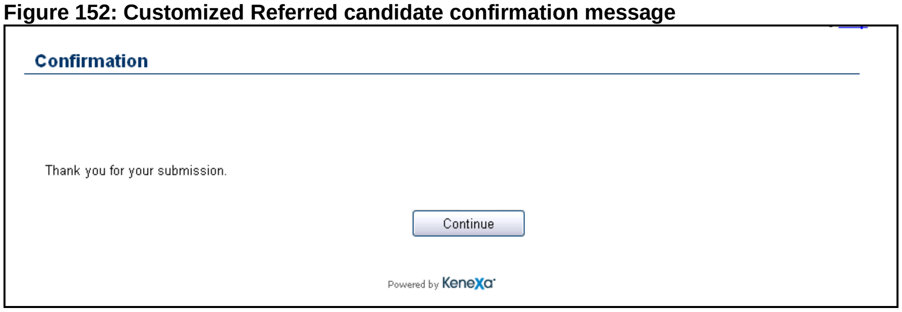
The candidate can click the link to launch the **Job details** page.

Figure 151: Job details when clicked from Search results – submission process



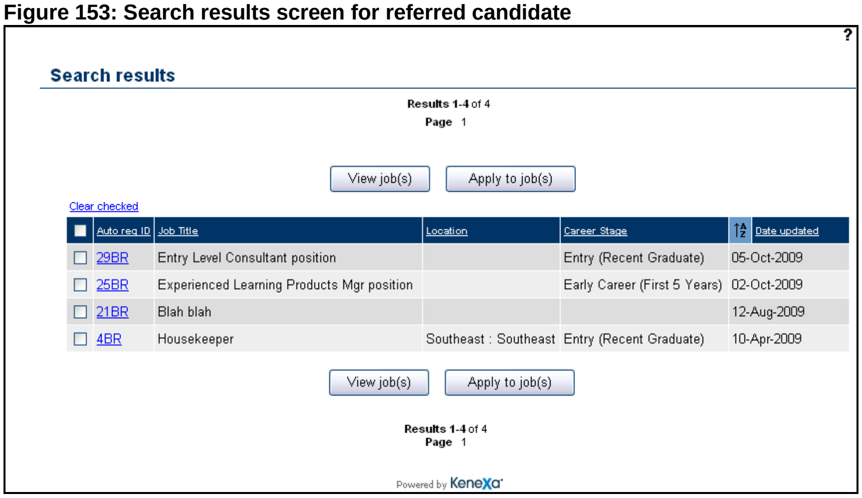
The candidate clicks **Apply to job(s)**, follows the configured submission process, finishes the submission and receives the confirmation message.

Figure 152: Customized Referred candidate confirmation message



The candidate clicks **Continue** and the **Search results** page displays again. The candidate can view and apply to other jobs from this page.

Figure 153: Search results screen for referred candidate



If the candidate tries to submit an application to a job more than once, the system displays the appropriate error message.

Submitting to Multiple Jobs with Different Application Flows

If a referred candidate applies to multiple jobs that have different apply flows (either different GQs or a mixture of GQs and TG apply), those referred candidate will be presented with the “Selected jobs” page to facilitate the application process.

Referral TG Settings and Conditions for Submission

Table 5: Referral TG Settings and Conditions for Submission

If Referral TG Settings are…	the conditions for successful submission are…
“Referral submission” = “Standard”	The candidate is submitted to all requisition(s) immediately (before candidate receives referral eLink).
“Referral submission” = “Data Privacy”	The referred candidate should NOT be submitted to any requisition unless the candidate: 1. Clicks the referral link. 2. Agrees to the data privacy policy. 3. Completes the submission.
“Referred candidate eLink start page” = “Search jobs”, “Resume/CV”, or “Questions/Forms”	When any one of these other start pages are selected, the candidate is automatically submitted to ALL jobs that the employee referred the candidate once the candidate accepts that Data privacy policy.
“Referred candidate eLink start page” = “Search results” AND “Referral submission” = “Data privacy”	The referred candidate will \ be submitted ONLY to those jobs for which they completed a submission. **Example:** If the employee referred the candidate to 5 jobs, but the referred candidate applies to 3, only the 3 job req codes will be sent to KRB, The referred candidate will be filed only to those 3 requisitions.

Employee Referral Gateways: Send to Friend Preview

Using "Send to Friend" functionality, employees can send job details to a potential candidate before submitting the job referral through the Employee Referral Gateway. The **Send to Friend** e-mail does not include a link to apply for the job.

Date Available

This feature is available for configuration in R12.2 Build 0.

US: November 19, 2009

EU: November 25, 2009

Cost

No additional cost.

How Do I Get this Feature?

Your Kenexa consultant must configure the Talent Gateway setting. Your Certified Workbench User can customize the text fields in Workbench.

Benefits

Potential candidates can verify their interest in one or more positions before the employee makes the referral.

How It Worked Before

"Send to a friend" functionality was not available on employee referral gateways. Potential candidates could not review the job *before* the employee made the referral.

How It Works Now

When an employee uses the "Send to a friend" functionality from a employee referral gateway, the friend could be directed to the search results of an external Talent Gateway with all jobs displayed that were selected on the referral TG for the Send to friend function and are actively posted on the destination Talent Gateway.

The external Talent Gateway (to which the referred candidate is directed) is configured in the **Default Talent Gateway for send to a friend** single-select field of the original internal gateway. (**Note:** It doesn't have to a referral gateway and external gateway pairing.)

Visible Changes

No visible changes.

Limitations and Known Issues

Potential candidates can review the job description but cannot go on to apply to the job from that workflow. The process does not track or facilitate the process of the friend notifying the employee of positive or negative interest.

Configuration

After your Kenexa consultant completes the initial enablement steps, your organization can do text customization for two fields:

- Send to friend pop up text on the **Search results** tab.
- Send to a friend e-mail text on the **Notifications** tab.

Destination of Send to a Friend Link/Button

When the “Send to a friend” functionality is used from a referral TG, the link/button launches the Talent Gateway designated in the **Default Talent Gateway for send to a friend** field.

If **Default Talent Gateway for send to a friend** is blank, the Talent Gateway used by the employee who clicked the **Send to a friend** button is launched.

If the destination Talent Gateway has *Single Sign On* (SSO) enabled, the candidate receives the error message configured in **Talent Gateway > Text customizations > Restricted access (tab) > Restricted SSO access page text**:

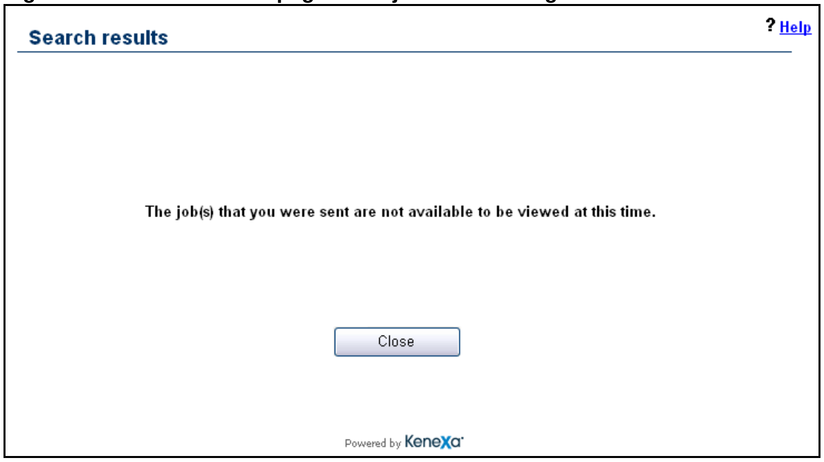
If the destination Talent Gateway has IP restrictions, the candidate sees the error message configured in **Talent Gateway > Text customizations > Restricted access (tab) > Restricted IP address page text**.

The candidate can view the posted jobs sent to him or her but cannot apply to the job from the Search results page or the Job details page.

Search Results When Jobs are No Longer Available

If there are no search results when the friend clicks the link/button, the **Search results** page displays the following message (instead of the jobs listing): “*The job(s) that you were sent are not available at this time.*”

Figure 154: Search results page when jobs are no longer available



User Experience

Figure 155: Send to a friend Job details from a referral TG

WBSS OR NOT User Import for Job Code Filtering

As of R12.1 (the previous release), Kenexa Recruiter BrassRing introduced Job Code Filtering. Customers can assign job codes to code access groups, and then assign KRB users to code access groups, thereby associating users to specific job codes. Once this mapping is done, KRB users can see only those job codes included in the code access group to which they are assigned, significantly reducing the difficulty of searching through a large number of job codes.

In R12.2, Workbench users can use Workbench's Import utility to import user profiles and job codes with the code access groups included in both types of import.

Date Available

This feature was available in R12.1, Build 1.

US: August 27, 2009

EU: September 2, 2009

Cost

No additional cost.

How Do I Get this Feature?

Please contact your Kenexa consultant for help with this feature.

Benefits

Your organization can include information about user membership in code access groups and the User Import utility can process it successfully.

How It Worked Before

The User Import utility did not support code access groups. Customers would have to set up code access group affiliation for users manually.

Visible Changes

There are no visible changes without configuration.

Best Practice Recommendations

When mapping a user profile or a codes profile for job codes, Kenexa suggests that you check the **Override** check box so that the import updates both new and existing users and job codes respectively.

Configuration

Workbench Configuration for Importing User Profiles

The goal is to import user profiles with code access group included each user profile into the system. The major configuration steps are:

1. Update the user profile Excel spreadsheet to include the correct column headers in the correct positions. This header file must include code access groups that have been added to the system.
2. Sometimes you may need to use a different Excel spreadsheet for creating the actual user profile import. Update that file if necessary. The header file and user import file must contain identical headers in the same position.
3. Create and/or update user import profile settings.
4. Launch the user profile import.

Creating and Launching the User Import

Note: Job Code filtering by code access group was introduced in R12.1.

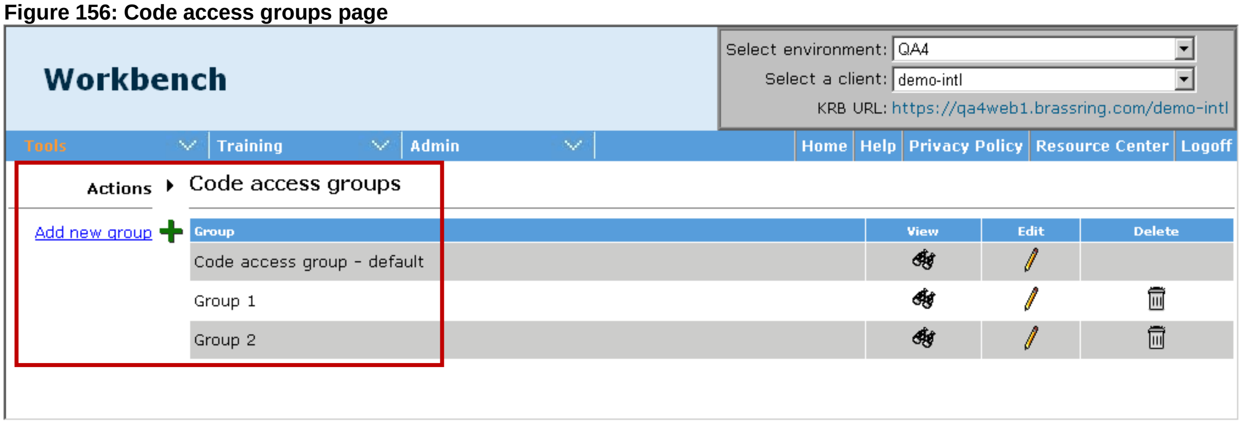
To create and launch the user import:

1. Plan and record the code access groups required and the attributes of each one, such as the job codes and the users that belong to each code access group.
2. Create code access groups in Workbench. In this step, you can manually assign users to code access groups and job codes to code access groups. Note: To add a large number of code access groups to the system at once, ask your Kenexa consultant to create a maintenance ticket.

   To configure code access groups:

   a. In Workbench, select **Tools > Users > Code access groups**.
   b. The **Code access groups** page displays.
   c. Add code access groups based on the information you collected previously.
   d. The **Code access groups** page updates and displays the new code access groups.

Figure 156: Code access groups page

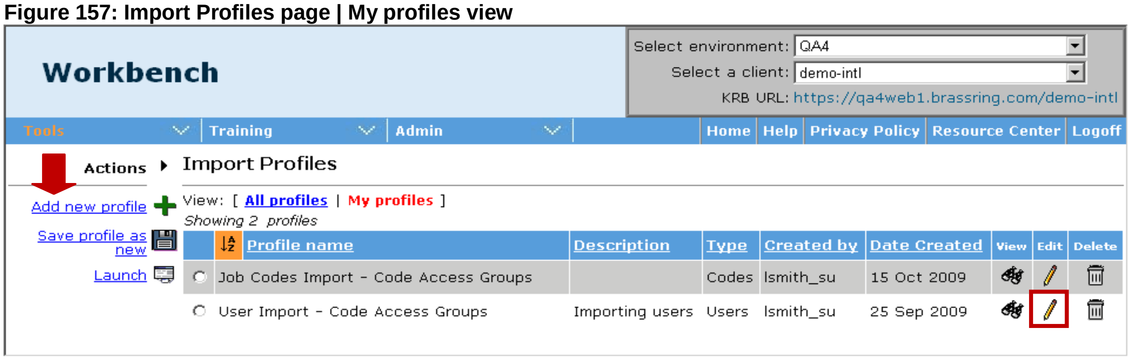


3. Configure the User Import:

   a. In Workbench, select **Tools > Import > Profiles**. The **Import Profiles** page loads.

b. Click **My profiles** if necessary to see a list of import profiles to which you have access.

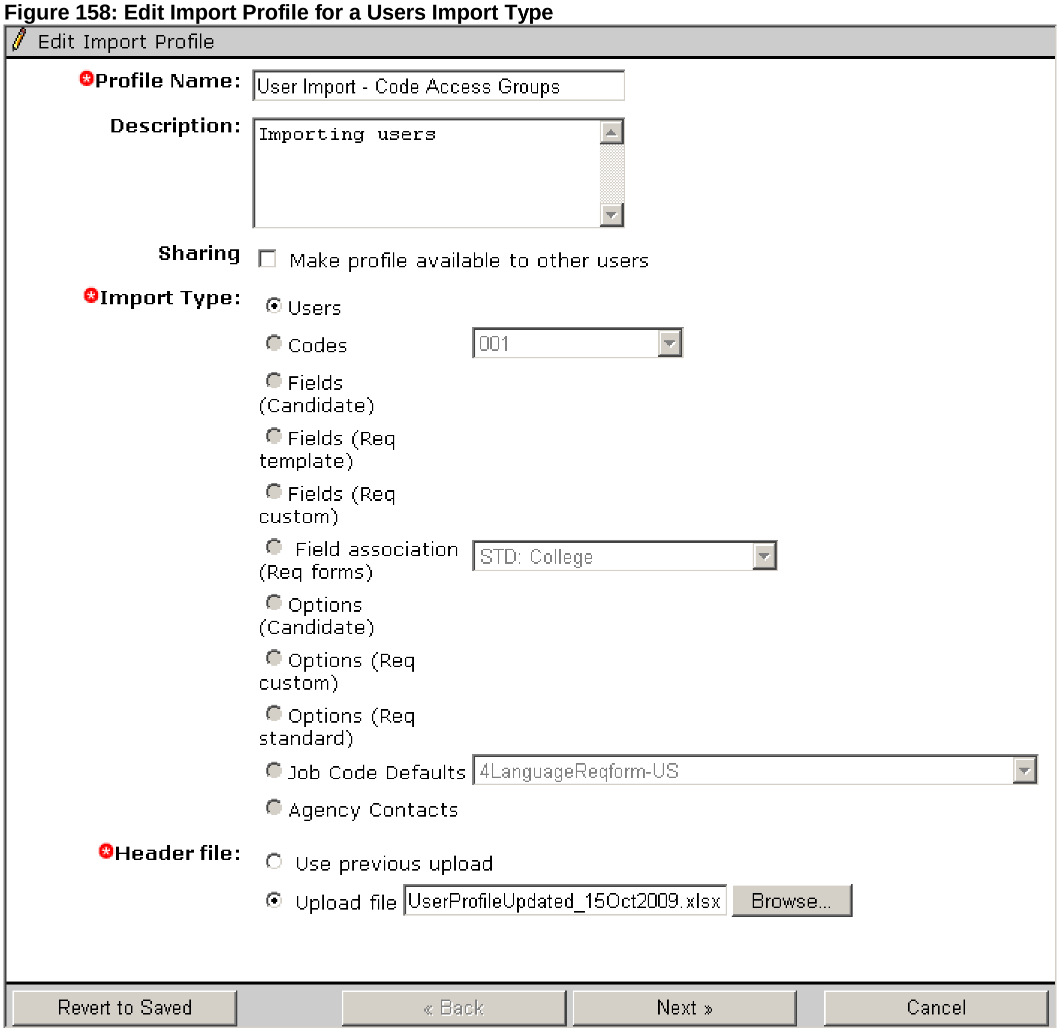
Figure 157: Import Profiles page | My profiles view



c. Click **Add new profile** in the **Actions** menu OR click the **Edit** icon for the profile you want to update.

d. The **Add Import Profile** / **Edit Import Profile** window opens. (The example below displays the **Edit Import Profile** window for an existing profile type of "Users.")

Figure 158: Edit Import Profile for a Users Import Type

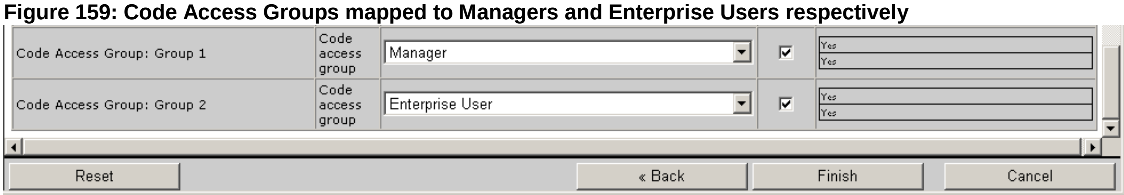


e. Enter the **Profile Name** and a **Description** if adding a new profile. If editing an existing profile, you can edit the name and description or leave them unchanged.
f. Select the check box for **Sharing** if you want to share this user profile with other users.
g. Select **Users** for **Import Type**.
h. Select **Upload file** for **Header file**. Browse to the updated Excel file that includes the column headers for all fields included in the customer's user profiles. These column headers should include, in the correct order, all user profile fields and the code access groups that have been added to the system.
i. Click **Next >>**.
j. The **Map Import Profile** window displays.

4. Perform the import profile mapping for code access groups:

a. Scroll to the bottom of the page where code access groups are listed.
b. For each code access group, select a field to map to in the **Map to** column. For example, map a code access group to Managers. Map another code access group to Enterprise Users.

Figure 159: Code Access Groups mapped to Managers and Enterprise Users respectively

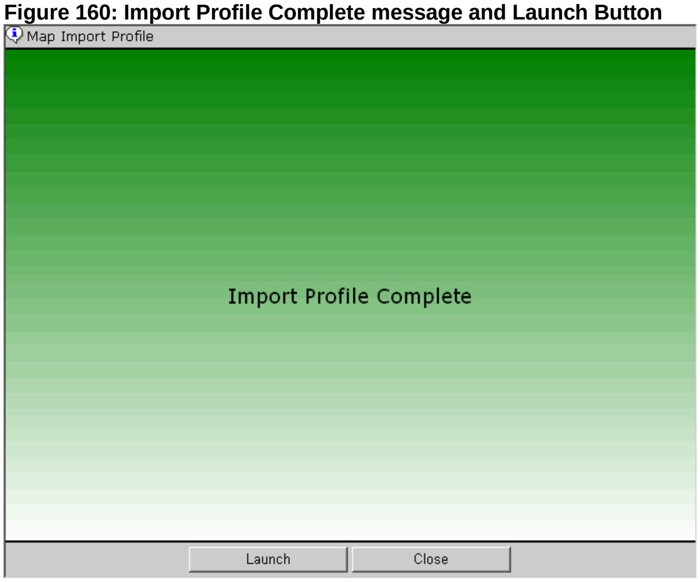


c. The **Overwrite** check box is unchecked by default.

- If you check the **Overwrite** check box option for a code access group, the code access group is upated as a result of the import for both new and existing user profiles. This is the preferred method.
- If you do not check the **Overwrite** check box option for a code access group, the code access group is uploaded only for new user profiles.

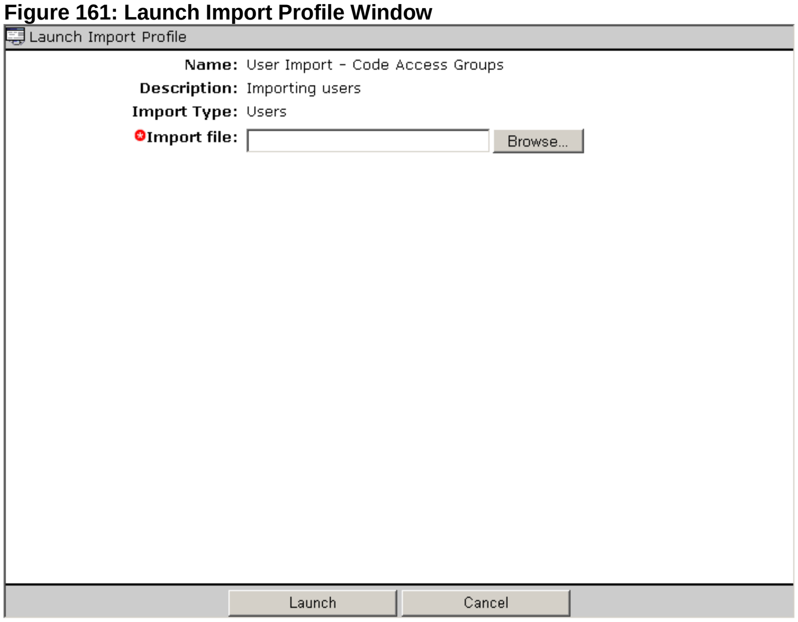
d. When you are finished configuring the settings on this page, click **Finish**.
e. Workbench saves your updates and displays the confirmation message and launch window:

Figure 160: Import Profile Complete message and Launch Button



f. Click **Launch**. The **Launch Import Profile** window displays.

Figure 161: Launch Import Profile Window



g. Click **Browse…** to select the Excel file to be used for this import. This file might be the same file as used for the header file on the **Add** / **Edit Import Profile** pages or it might be different. **Note:** If a different file is used than was used for the Header file, the header information must be identical or the import will fail.
h. Click **Launch**.
i. Workbench completes the user import.

If desired, your Kenexa consultant can log a maintenance ticket to perform a user import with code access groups using XML import.

Workbench Configuration for Importing Job Codes

The goal is to import job codes with code access groups into the system.
The major configuration steps are:

1. Update the job codes Excel spreadsheet to include the correct column headers in the correct positions. This header file must include code access groups that have been added to the system.

   Sometimes you may need to use a different Excel spreadsheet for creating the actual code import. Update that file if necessary. The header file and code import file must contain identical headers in the same position.

2. Create and/or update code import profile settings.
3. Launch the code profile import.

Creating and Launching the Job Codes Import

Note: Job Code filtering by code access group was introduced in R12.1

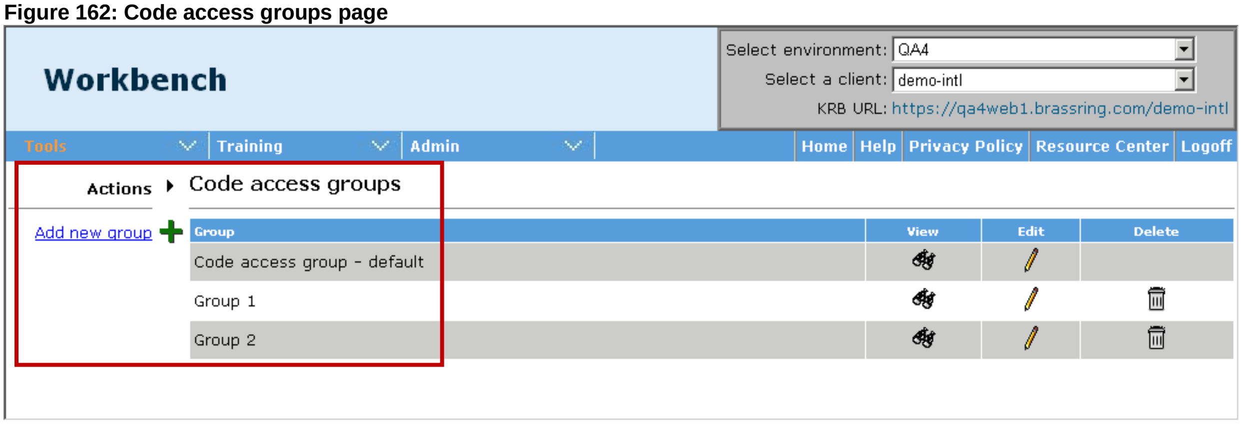
To create and launch the job codes import:

1. Plan and record the code access groups required and the attributes of each one, such as the job codes and the users that belong to each code access group.
2. Create code access groups in Workbench. In this step, you can manually assign users to code access groups and job codes to code access groups. Note: To add a large number of code access groups to the system at once, ask your Kenexa consultant to create a maintenance ticket.

To configure code access groups:

1. In Workbench, select **Tools > Users > Code access groups**.
2. The **Code access groups** page displays.
3. Add code access groups based on the information you collected previously.
4. The **Code access groups** page updates and displays the new code access groups.

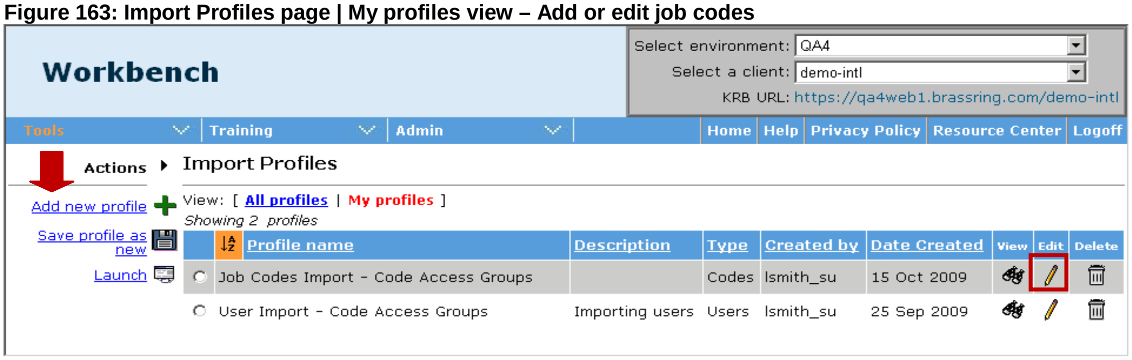
Figure 162: Code access groups page



5. Configure the codes import:

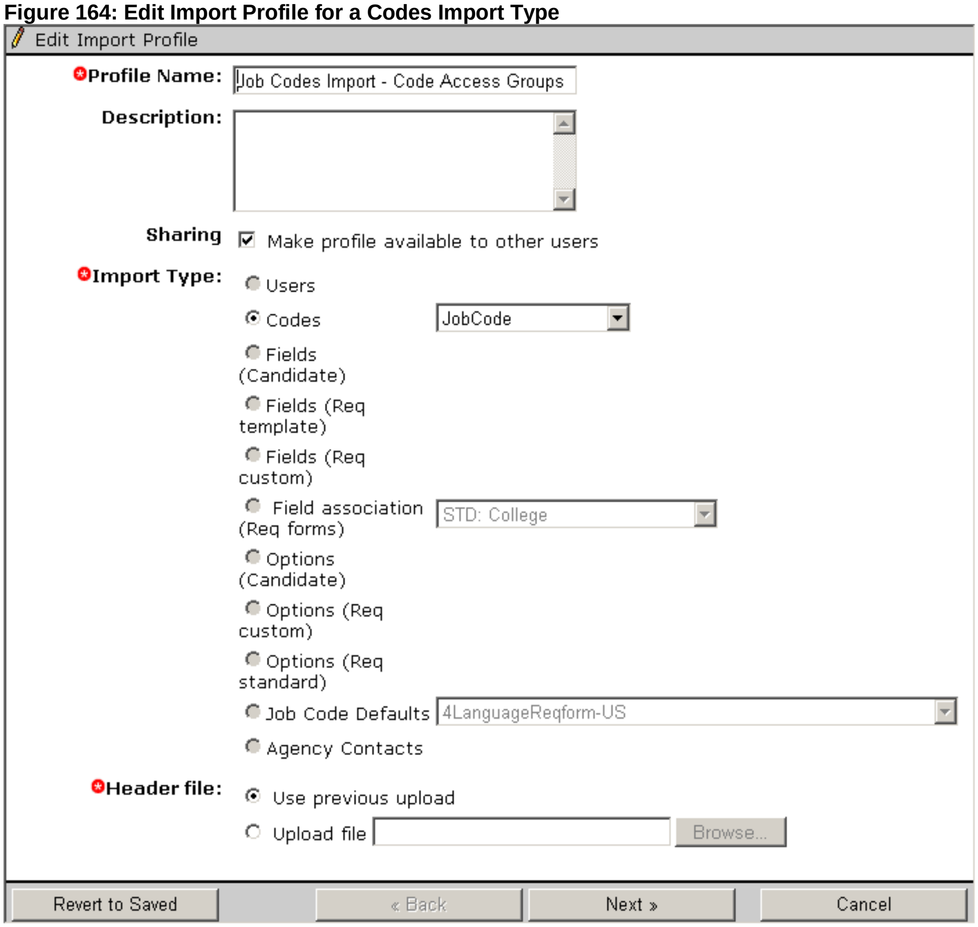
   a. In Workbench, select **Tools > Import > Profiles**. The **Import Profiles** page loads.
   b. Click **My profiles** if necessary to see a list of import profiles to which you have access.

Figure 163: Import Profiles page | My profiles view – Add or edit job codes



   c. Click **Add new profile** in the **Actions** menu OR click the **Edit** icon for the profile you want to update.
   d. The **Add Import Profile** / **Edit Import Profile** window opens. (The example below displays the **Edit Import Profile** window for an existing profile type of "Users.")

Figure 164: Edit Import Profile for a Codes Import Type



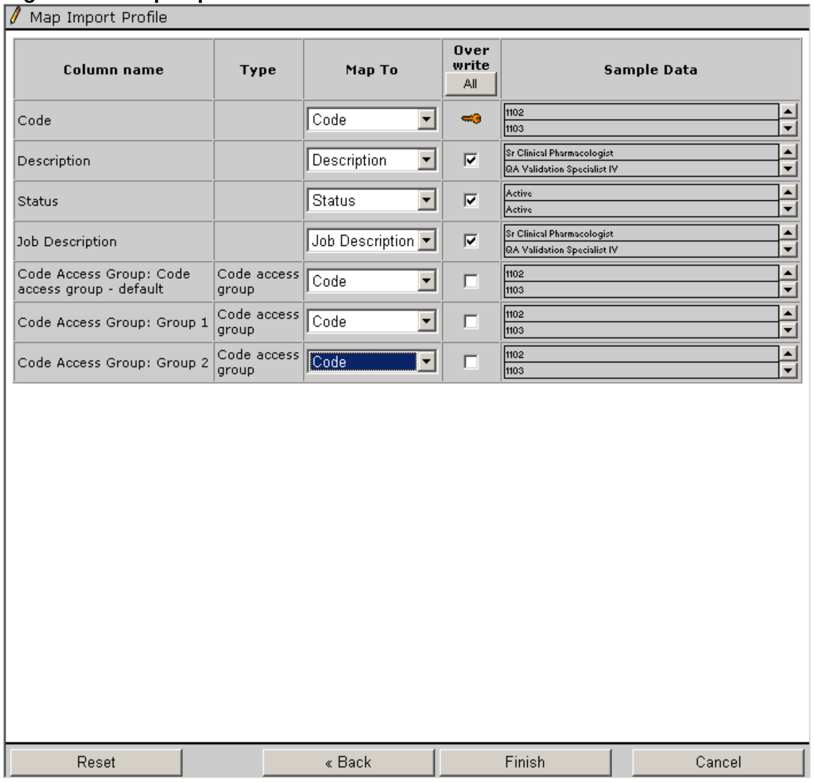
e. Enter the **Profile Name** and a **Description** if adding an new profile. If editing an existing profile, you can edit the name and description or leave them unchanged.
f. Select the check box for **Sharing** if you want to share this user profile with other users.
g. Select **Codes** for **Import Type**. Select **JobCode** from the dropdown list.
h. Select **Upload file** for **Header file**. Browse to the updated Excel file that includes the column headers for all fields included in the customer's job codes list. These column headers should include, in the correct order, all job code fields and the code access groups that have been added to the system.
i. Click **Next >>**.
j. The **Map Import Profile** window displays.

5. Perform the import profile mapping for job codes to include code access groups:

   a. For each code access group, select an entity to map to in the **Map to** column. (In this case, select **Code** in the single-select list.)
   b. The **Overwrite** check box is unchecked by default.

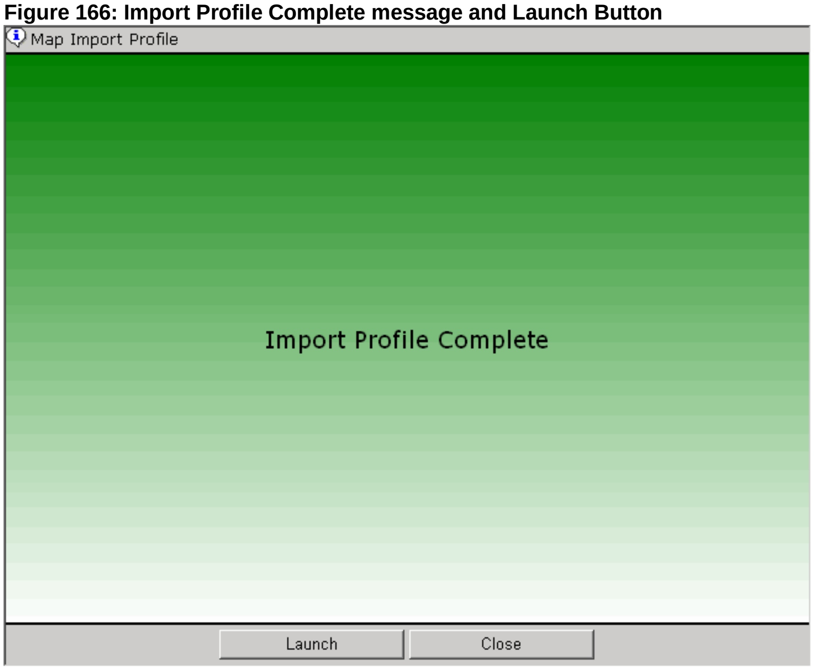
      - If you check the **Overwrite** check box option for a code access group, the code access group is updated as a result of the import for both new and existing job codes. This is the preferred method.
      - If you do not check the **Overwrite** check box option for a code access group, the code access group is uploaded only for new job codes.

Figure 165: Map Import Profile window for Codes



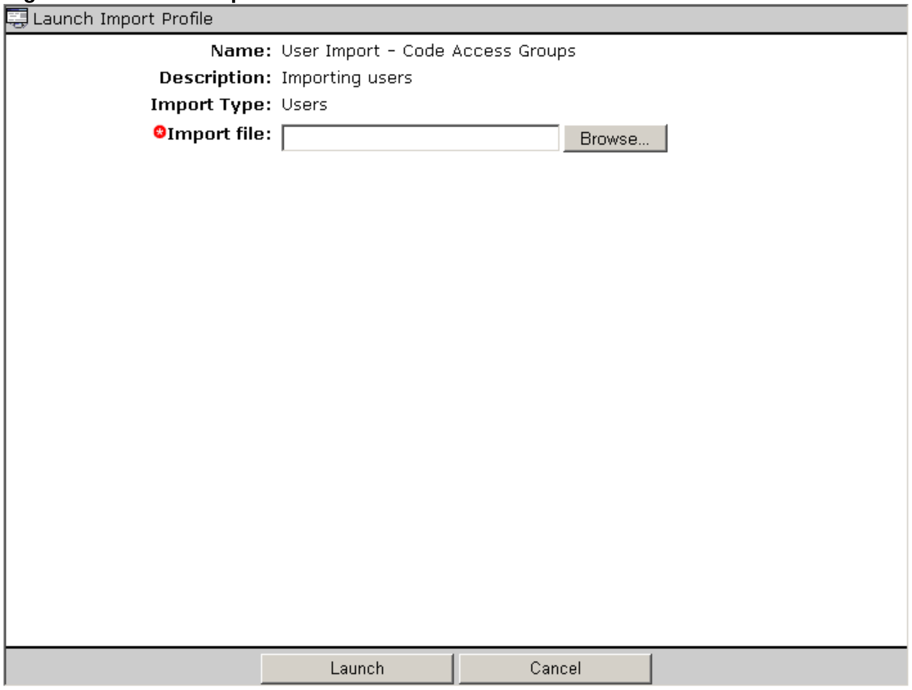
c. When you are finished configuring the settings on this page, click **Finish**.
d. Workbench saves your updates and diplays the confirmation message and launch window:

Figure 166: Import Profile Complete message and Launch Button



e. Click **Launch**. The **Launch Import Profile** window displays.

Figure 167: Launch Import Profile Window



f. Click **Browse…** to select the Excel file to be used for this import. This file could be the same file as used for the header file on the **Add** / **Edit Import Profile** pages, or it could be a different file. Note: If a different file is used than was used for the Header file, the header information must be identical or the import will fail.
g. Click **Launch**.
h. Workbench completes the codes import.

User Import Supports Approval Groups

The user profile import, performed through Workbench, includes Approval Groups. In addition, XML schema for user import includes an Approval Groups node. Please see the next section for more information.

User Import XML Schema Enhancement: Populates Approval Lists

The User Import XML schema includes a new node called Approval Group, contained within the User node, enabling clients to populate approval lists as one attribute of user import. Clients designate the processing order for the listed Approval Groups. See page 174 for more information about additions to the User Import schema. **Note:** The Approval Groups node is also included in the Job Codes XML schema.

Approval Groups Node XML

```
<ApprovalGroups>
	<Group>Appr Group</Group>
	<Group>Another Appr Group</Group>
</ApprovalGroups>
```

User Import XML with Approval Groups Node

```
<?xml version="1.0"?>
<Envelope xmlns:br="http://trm.brassring.com/integrations" version="01.00">
	<Sender>
		<Id>6452</Id>
		<Credential>11714</Credential>
		<remoteIP>172.29.0.34</remoteIP>
	</Sender>
	<Recipient>
		<Id></Id>
	</Recipient>
	<TransactInfo transactType="data">
		<TransactId>HSCAND12562</TransactId>
		<TimeStamp>08/29/2006 05:01:00 PM</TimeStamp>
	</TransactInfo>
	<Packet>
		<PacketInfo packetType="data">
			<PacketId>1</PacketId>
			<Action>SET</Action>
			<Manifest>MIL_USER</Manifest>
		</PacketInfo>
		<Payload>
		<![CDATA[
		<?xml version="1.0"?>
```

```
        <Users>
            <User>
                <FirstName>SatTestFN</FirstName>
                <LastName>SatTestLN</LastName>
                <EmployeeID>EMP_KAR123</EmployeeID>
                <UserName>SatTest</UserName>
                <Password>PWD</Password>
                <Email>testemail@ubs.com</Email>
                <UserType>Recruiter</UserType>
                <UserGroup>NON-US</UserGroup>
                <OrgGroup>Req Group</OrgGroup>
                <ApprovalGroups>
                    <Group>Appr Group</Group>
                    <Group>Another Appr Group</Group>
                </ApprovalGroups>
                <CodeAccessGroups>
                    <Group>Code Group</Group>
                    <Group>Another Code Group</Group>
                </CodeAccessGroups>
            </User>
        </Users>]]></Payload>
    </Packet>
</Envelope>
```


<ApprovalGroups> node added to the User Import xml schema

Approval Groups Business Rules

- This attribute is not required.
- The node may only appear once in the schema.
- The Approval Group node must contain a proper Group title. The title can be found in the Title column of the Access Titles table, or on the Edit user page in Workbench.
- Approval groups with only the selected approvers can be included in the Group nodes (Approver Type=3 in Approval Titles table).
- If the ApprovalGroups node is not provided, no changes are made to the “Approval Groups” for the user.
- If the "Approval Groups" node is there but it contains no “groups” then any existing Approval Groups associated with that user will be removed.
- If a existing user is associated with other ApprovalGroups node(s), the user is removed from all of those nodes and added to the ApprovalGroup node(s) provided in the XML file. (In other words, the Approval Groups in the XML file override those already in KRB for existing users.)
- User membership is stored in the Approvers table.
- The title for the Approval Group Node must be valid. If the title in the Approval Group Node value is invalid, the import fails and the system displays an appropriate error message.
- If you did not choose “selected users” for the Approval Group Type, and you then try to add a user, the import fails and the system displays an appropriate error message.

Date Available

This feature was available in R12.1, Build 1.

US: August 27, 2009

EU: September 2, 2009

Cost

No additional cost.

How Do I Get this Feature?

Please contact your Kenexa consultant for more information about this feature.

Benefits

The existing user import functionality will now allow the User XML import utility will accept information about a user membership in Approval Groups.

How It Worked Before

The User Import XML schema did not support Approval Groups. Clients had to assign users to Approval Groups manually.

Visible Changes

There are visible changes associated with this feature in Workbench.

Limitations and Known Issues

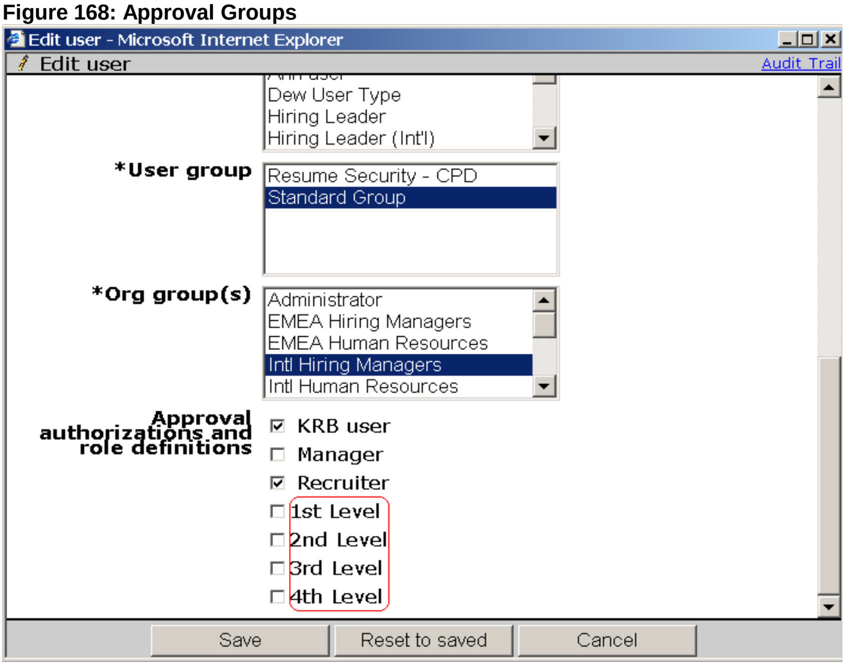
Your organization cannot import Approval Groups *en masse* through XML import.

Configuration

Workbench Import

In Workbench, select **Tools > Import > Profiles > Add new profile > Add/Edit Import Profile**.

Figure 168: Approval Groups



User Experience

Once they are imported into KRB, user profiles include the approval groups to which the user belongs.

XML Integrations Supports Job Code Filtering

The User Import XML schema includes a Code Access Groups node to support Job Code Filtering, introduced in R12.1. Clients using Job Code Filtering can include this attribute in their XML import schema.

Your organization designates the processing order for the listed code access groups in the XML file.

Figure 169: Node XML Example

```
<CodeAccessGroups>
                              <Group>Software Development Group</Group>
                              <Group>Senior Manager Group</Group>
</CodeAccessGroups>
```

Rules for the Code Access Groups XML Node

- This node is not required.
- The node can appear once in the XML schema.
- The node must contain a proper name. The name is stored in the **Name** column of the AccessGroups table and is listed on the Code Access Groups page in Workbench.
- If the CodeAccessGroup node is not included in the XML file, no changes are made to “Code Access Groups” for the user.
- If the "Code Access Group" node is included but it contains no Groups, then any existing Code Access Group associated with that user is removed. [Accordingly, this might be the way to move an association to a Code Access Group, or is there a more direct way? I understand that the main point is more negative – you could overwrite the existing code access group association inadvertently.]
- If an existing user is associated with other CodeAccessGroup node(s), the user is removed from all of those nodes and added to the CodeAccessGroup node(s) provided in the XML file. (In other words, the CodeAccessGroups in the XML file *always* override those previously stored in KRB for existing users.)
- User membership is stored in the AccessGroupUsers table.
- The title for the Code Access Group Node must be valid. If the title in the Code Access Group Node value is invalid, the import fails and the system displays an appropriate error message. [Is the title different than the name?]

Updated XML User Import File

The XML user import file must have the following content and syntax:

Figure 170: XML file for User Import


```
<?xml version="1.0"?> [Does xml file start with "<"?]
<Envelope xmlns:br="http://trm.brassring.com/integrations" version="01.00">
	<Sender>
		<Id>6452</Id>
		<Credential>11714</Credential>
		<remoteIP>172.29.0.34</remoteIP>
	</Sender>
	<Recipient>
		<Id></Id>
	</Recipient>
	<TransactInfo transactType="data">
		<TransactId>HSCAND12562</TransactId>
		<TimeStamp>08/29/2006 05:01:00 PM</TimeStamp>
	</TransactInfo>
	<Packet>
		<PacketInfo packetType="data">
			<PacketId>1</PacketId>
			<Action>SET</Action>
			<Manifest>MIL_USER</Manifest>
		</PacketInfo>
		<Payload>
		<![CDATA[
		<?xml version="1.0"?>
		<Users>
			<User>
				<FirstName>SatTestFN</FirstName>
				<LastName>SatTestLN</LastName>
				<EmployeeID>EMP_KAR123</EmployeeID>
				<UserName>SatTest</UserName>
				<Password>PWD</Password>
				<Email>testemail@domain.com</Email>
				<UserType>Recruiter</UserType>
				<UserGroup>NON-US</UserGroup>
				<OrgGroup>Req Group</OrgGroup>
				<ApprovalGroups>
					<Group>Appr Group 1</Group>
					<Group>Appr Group 2</Group>
				</ApprovalGroups>
	 <CodeAccessGroups>
				<Group>Code Group 1</Group>
				<Group>Code Group 2</Group>
				<Group>Code Group 3</Group>
			</CodeAccessGroups>
			</User>
		</Users>]]></Payload>
	</Packet>
</Envelope>
```


Date Available

This feature was available in R12.1, Build 1.

US: August 27, 2009

EU: September 2, 2009

Cost

No additional cost?

How Do I Get this Feature?

Please contact your CSC for assistance with this feature.

Benefits

Your organization can include information about user membership in Code Access Groups and the User Import utility can process it successfully.

How It Worked Before

The Import utility did not support Code Access Groups. Customers would have to add code access group affiliation for users and job codes manually.

Visible Changes

There are no visible changes without configuration.

XML Integrations Support List Filtering

List filtering is a capability in the new XML import functionality. **Note:** The new import functionality does not change the visible data set unless it is explicitly specified in XML. If the option is not specified in the XML the input value does not change.

Feature Details

The user import XML schema now includes a List Filter node. Customers can use this node to perform list filtering on foundation data in the XML import.

You can set up list filtering on foundation data for up to four (4) languages maximum.
You can create filters for the following fields:

- Any configurable standard req field
- Any configurable custom req field from the req field index [what is that? Do they need to know this?] or from any req template
- Job codes

XML for the List Filter Node

```
<ListFilters>
        <Filter formtypeid="44" action="hide"/>
        <Filter formname="APAC - Professional"
        action="show"/>
</ListFilters>
```

See a description of List Filter attributes in the table below.

Rules for the List Filter XML Node

- The List Filter node not required.
- The node must contain a proper name.
- The node title must be valid or the import will fail and Workbench displays an error.

Is the name the same thing as the title?]

- Each Foundation_Item can have only one List Filter node

Table 6: Definitions of Node Filter Attributes:

Attribute	Description
Form name	Is the name of the requisition template (the Req form). It is a required attribute and if no form name is provided the Form type id is used.
Form type ID	Is the form type id. It is a required attribute and if no Form type id is provided the form name is used.
Action	Action determines whether the field displays in “show” or “hide” mode.

Validations

If any of the List Filter attributes are missing or not recognized, the integration faila:

- If "Form type" is not recognized or missing, the import fails and the following error message is displayed: Form type selected is invalid."
- If the "Language" is not recognized or missing, the import fails and the following error message is displayed: "Language selected is invalid."
- If the "Action" is not recognized or missing, the import fails and the following error message is displayed: "Action selected is invalid."
- If more than one List Filter node per Foundation_Item node is found, the import fails and the following error message is displayed: "Node selected is invalid."

XML Integration Validation Scenarios

XML import lets you use multiple templates for list filtering.

Workbench allows only the list filter for the form type you are currently on.

Foundation Data XML

The XML code below creates or updates the option with the code "mycode" and provides descriptions in four (4) languages. [Only these four languages, or can it be done for a different set of four languages? Is this four languages in addition to the base language?]

For the client base language argument, "language" can be dropped from Description node. [Should I say what happens to the base language? I don't really understand this point except that it seems like the Base language is "understood", whereas the other languages have to be included in the Description node.]

Date Available

This feature was available in R12.1, Build 1.

US: August 27, 2009

EU: September 2, 2009

Cost

There is no cost if your organization subscribes to the Foundation Data integration.

How Do I Get this Feature?

Your organization must subscribe to the Foundation Data integration.

Benefits

Clients can import foundation data into their XML integrations for multiple requisitions using a list filtering logic instead of adding this data manually. They can also define new options in the HRIS system and send the options or updates to KRB, specifying to which requisition template the new or edited option should be applied.

How It Worked Before

The XML import schema did not allow filtering on foundation. Clients could not send new options or updates to options from their HRIS systems to KRB.

Visible Changes

There are no visible changes associated with this feature.

Limitations and Known Issues

List filtering does not include Candidate forms, Req addendum forms, other code types except for Job Code Default Data. Note: The existing Job Code Default Data list filter has not changed.

Export Job Description Using API/RSS Feature

In this release, there is a new xml tag for use as an input parameter: (**<JobDescription>yes/no</ JobDescription>**). By default, the **JobDescription** parameter is **no**. Job Descriptions can be exported in XML and RSS formats.

If the **JobDescription** node is set to **Yes**, the API returns up to 50 jobs with a full job description from the requested page.

Date Available

This feature is available in R12.2, Build 0.

US: November 19, 2009

EU: November 25, 2009

Cost

No additional cost.

How Do I Get this Feature?

Please contact your Kenexa consultant for more information.

Benefits

Clients can include foundation data in their XML Integrations.

How It Worked Before

This is a new feature.

Visible Changes

No visible changes.

Limitations and Known Issues

This enhancement does not include list filtering on:

- Candidate forms
- Req Addendum forms
- Any other code type except Job code default data

SmartApproval Enhancements

Online Help

SmartApproval has its own online Help system, accessed from the question mark icon in the top right corner of the SmartApproval window.

Figure 171: SmartApproval Online Help

Reporting on SmartApproval Data

The Forms and Requisitions functional areas include SmartApproval filters and output fields.

Table 7: Forms functional area – SmartApproval filters and output fields

Main Functional Area	Filters/Output Fields	Output	Filter	Security
*Smart Approval Fields	Alternative for	Yes	Yes	Yes
	Workflow	Yes	Yes	Yes
	Approver sequence	Yes	Yes	Yes
	Express Approve	Yes	Yes	Yes

Table 8: Requisitions functional area – SmartApproval filters and output fields

Category	Sub-Category	Fields	Output	Filter	Security
Approval Information	*Smart Approval	Alternative for	Yes	Yes	Yes
		Workflow	Yes	Yes	Yes
		Express Approve	Yes	Yes	Yes

Date Available

This feature was available for use in R12.1 Build 0.

Cost

No additional cost.

How Do I Get this Feature?

This feature is automatically available to organizations using SmartApproval and the Data Insight Tool.

Benefits

Your organization can report on SmartApproval data.

How It Worked Before

The Data Insight Tool did not support SmartApproval data.

Visible Changes

There are no visible changes in SmartApproval because of this feature. There are visible changes in the Data Insight Tool.

[INTERNAL] SmartApproval: Delete Functionality Enhancement

SmartApproval users can no longer delete data permanently in SmartApproval. When users choose to delete data (by clicking the **Delete** button on the **Roles** page of the **Admin** tab, for example), the status of the data is changed to *Inactive*; the data are not actually deleted.

This change affects the following Smart Approval pages:

Figure 172: Delete Roles

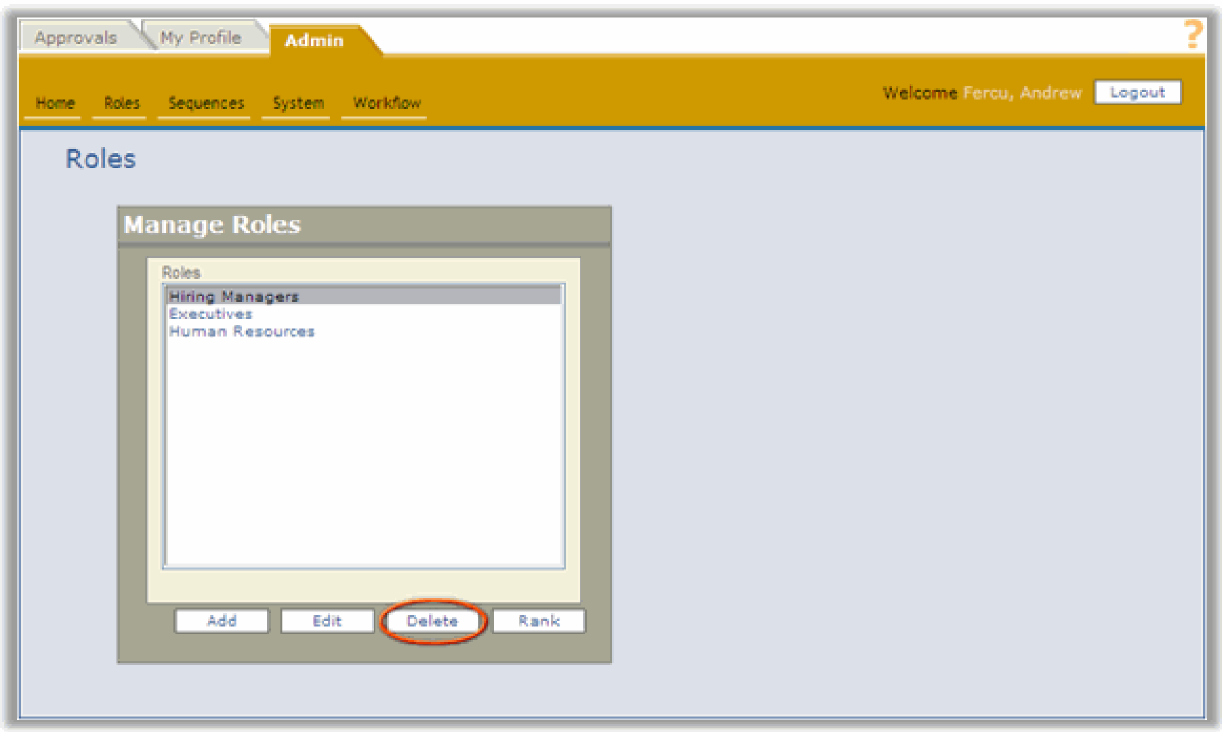


Figure 173: Delete Business Rules

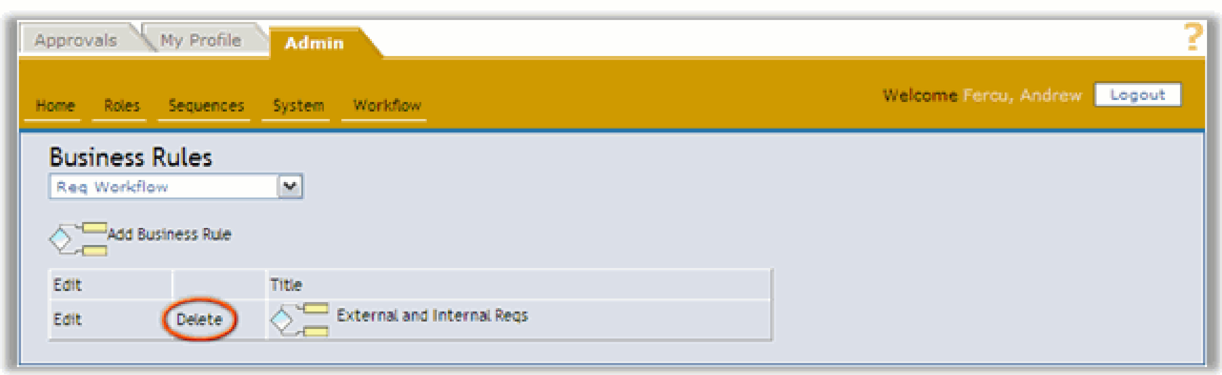


Figure 174: Delete Sequences

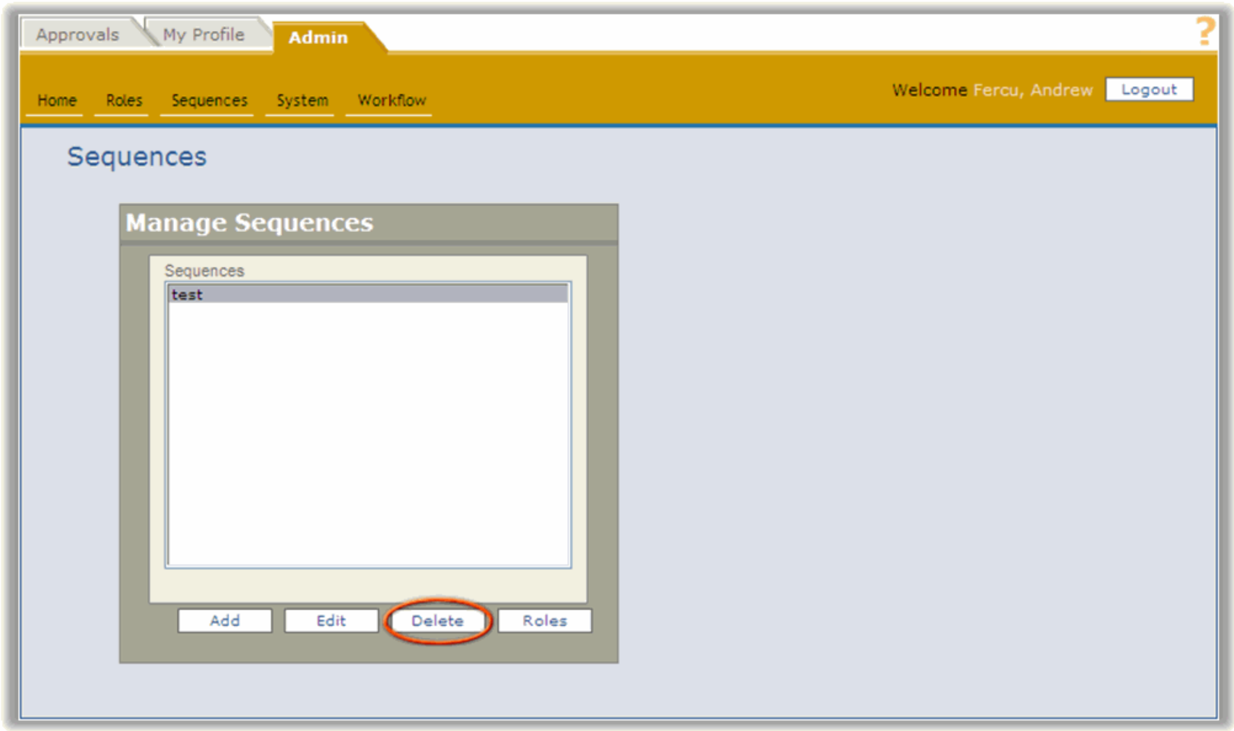


Figure 175: Delete Workflow Types

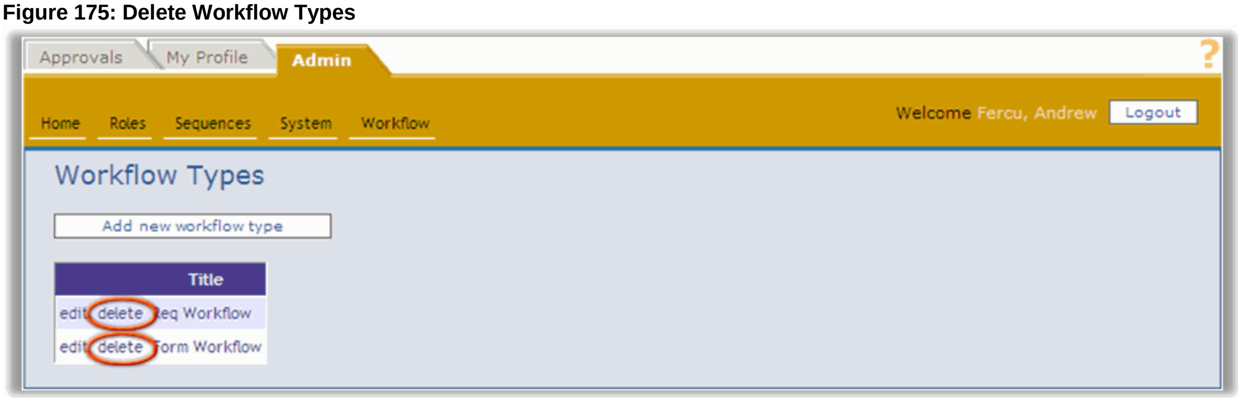
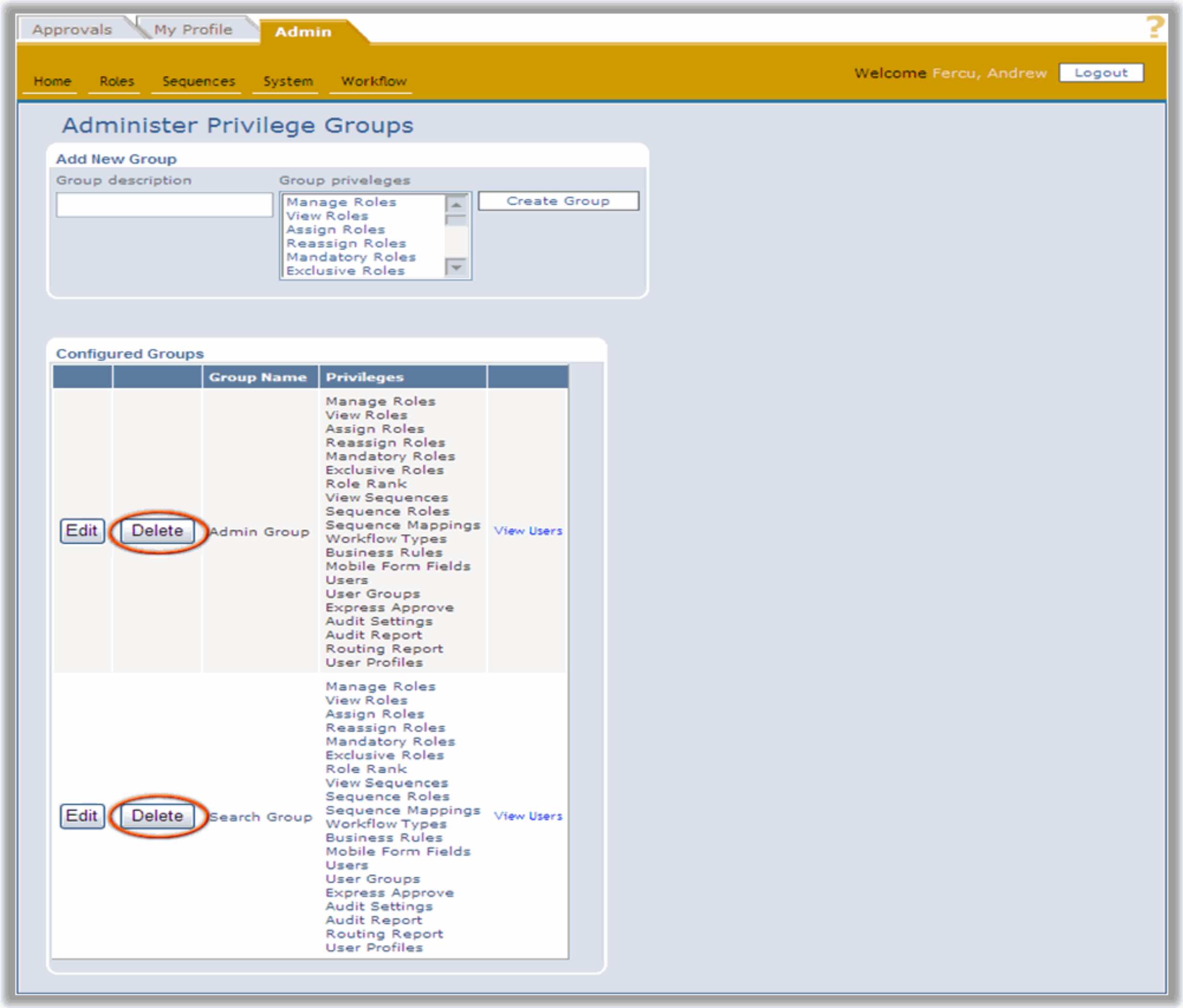


Figure 176: Delete Privilege Groups



The System Workflow

While the workflow on each page is the same for SmartApproval users, the system workflow is changed in response to a user clicking **Delete**:

1. The user clicks Delete for one of the tasks listed previously.
2. The system marks the field as inactive.
3. The system removes the field from the view of the user.

Business Rules

No data (including workflow trigger) are deleted when a user chooses to inactivate a workflow. Instead, the data are stored and recoverable when the user decides to recover the inactivated data.

Because the field is no longer removed, there may be conflict due to the field name. To avoid any issues the following business rules have been put in place:

- Users are able to create active fields with the same field name as inactive fields.
- When a field is reactivated, "_reactivated" is appended to the end of the field name if a field with the same name already exists; append an instance number thereafter to avoid repetition of the same name (for example, Lorem, Lorem_Reactivated, Lorem_Reactivated1, Lorem_Reactivated2, and so forth).
- Reactivated fields behave as if they were never deactivated, with the same configuration and associations still in place.
- If a user deletes the workflow for a Req/form that is currently in the approval process, the user will receive an error popup when accessing that Req/form from KRB. (Same functionality as today when the workflow is deleted and a Req/Form does not have a workflow anymore)
- If a user deletes the workflow for a Req/form that is has finished the approval process (approved or declined), the user will receive an error popup when accessing that Req/form from KRB. (Same functionality as today when the workflow is deleted and a Req/Form does not have a workflow anymore)
- eLink behavior remains the same as for deleted workflows today. Users see an error when they click an eLink for a Req/Form approval that has a deleted workflow.

Date Available

This feature is available in R12.1 Build 3.
US: October 8, 2009
EU: Octover 14, 2009

Cost

No additional cost. (Asking KRB Engineering to restore data may incur a cost.)

How Do I Get this Feature?

If your organization uses SmartApproval, you get this feature automatically.

Benefits

This feature protects SmartApproval data.

How It Worked Before

Users could delete SmartApproval data.

Visible Changes

No visible UI changes. The change is in the backend functioning.

Details, Limitations, and Known Issues

KRB Systems Engineering can reactivate inactivated fields.

1. User or CSC submits a ticket with the field they would like to reactivate.

2. The engineer receives the ticket and changes field activity value from inactive to active.
3. Field is now active with previous associations and configurations (as if the field were never deactivated).
4. If a new field was created with the same name, the reactivated field of the same name is renamed to **FieldName_reactivated**. Note: Users can rename the field (which is existing functionality).

Configuration Audit Report

SmartApproval system administrators can run and view the results of the new **Configuration Audit Report**, which tracks configuration changes to SmartApproval.

To run the Configuration Audit Report:

1. Log in to SmartApproval and select **Admin > Systems > Reports**.
2. Click the report name on the **Reports** page.

Figure 177: Configuration Audit Report Link

3. The **Configuration Audit Report** opens.

Figure 178: Configuration Audit Report Example

Date Available

This feature is available in R12.1 Build 3.
US: October 8, 2009
EU: Octover 14, 2009

Cost

No additional cost.

How Do I Get this Feature?

If your organization uses SmartApproval, you get this feature automatically.

Benefits

This feature lets you track changes to your SmartApproval data.

How It Worked Before

No configuration audit report existed.

Visible Changes

There are visible changes associated with this feature.

Reporting

Data Insight Tool Enhancements

In the Templates Management Module, Data Insight Tool users can:

- View the full path to filters and output fields in worksheets.
- Perform a keyword search for filters and output fields from the taskbar when creating or editing a template.
- Add filters for code types when creating or editing a template.
- Report on a code description.
- Report on KRB approval data (captured in the Forms and Requisitions functional areas).
- Report on SmartApproval data (captured in the Forms and Requisitions functional areas).

In the User Role Management Module, Administrative users can:

- Search for security role items from within the User Role Workshop when creating or editing user roles.
- Run the **Distribution Audit** report.

Date Available

This feature is available in R12.2, Build 0.
US: November 19, 2009
EU: November 26, 2009

Cost

No additional cost.

How Do I Get this Feature?

These features are automatically available if your organization uses the Data Insight Tool.

Benefits

Expanded reporting capabilities.

Visible Changes

There are visible changes. See the detailed description of the featue and see the visible changes document.

User Experience

Viewing the Full Path for Filters and Output Fields

To view the full path for filters and output fields added to your worksheet, pass the mouse over the filter/output field to display the full path in a pop-up window.

Searching for Filters and Output Fields

When you are creating or editing a template, you can perform a keyword search for filters and output fields from the task bar. This is a standard "contains" search. For example, if I enter "Cost Center," Insight returns all filter fields with the words "Cost Center" in the name.

- You can search only for filters OR output fields in this search box.
- You can select "starts with" to search for the term in a different manner.
- You can enter up to 50 characters.
- You can use the wild cards * or %.

Figure 179: Search box for Filters

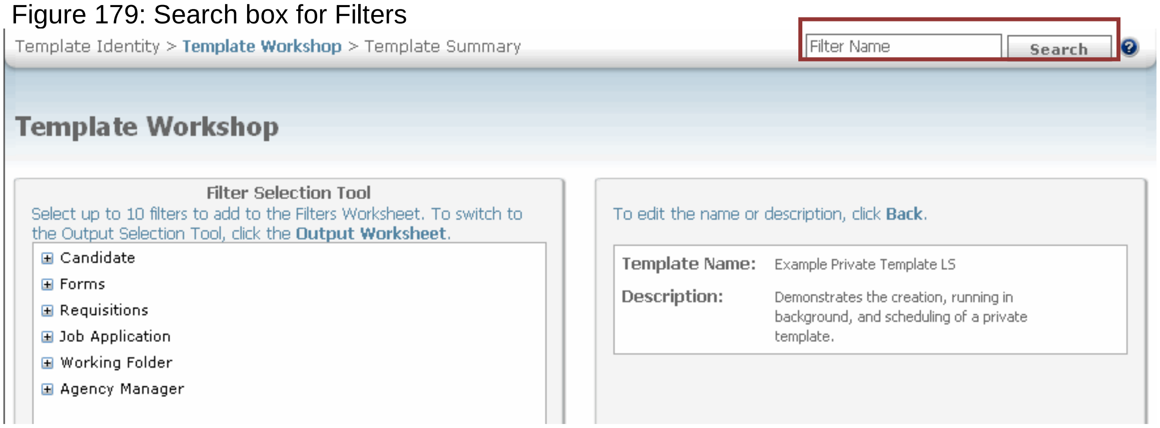
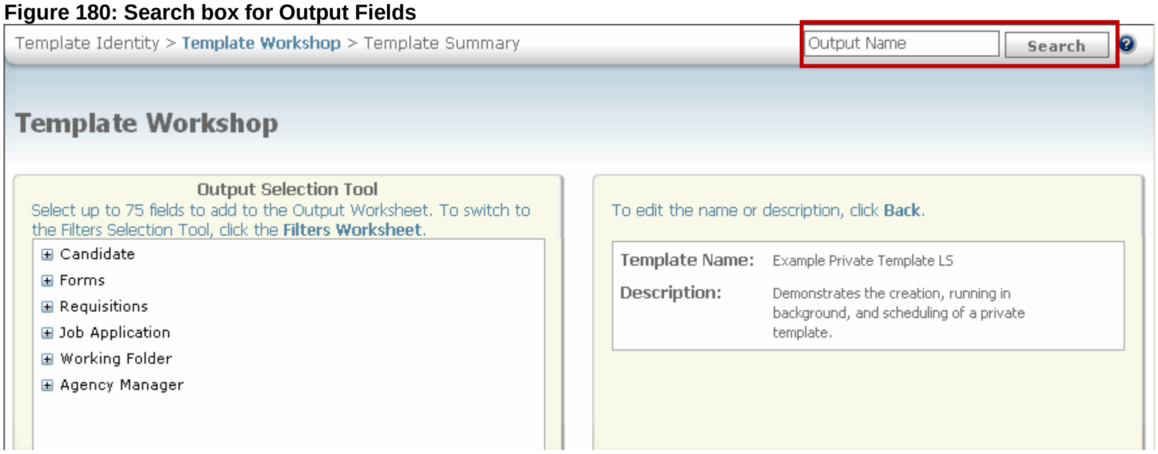


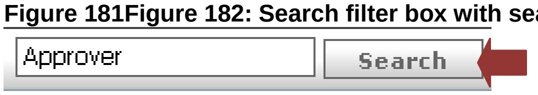
Figure 180: Search box for Output Fields



To search for filters or output fields:

1. Enter the keyword(s) or search term(s) in search field.

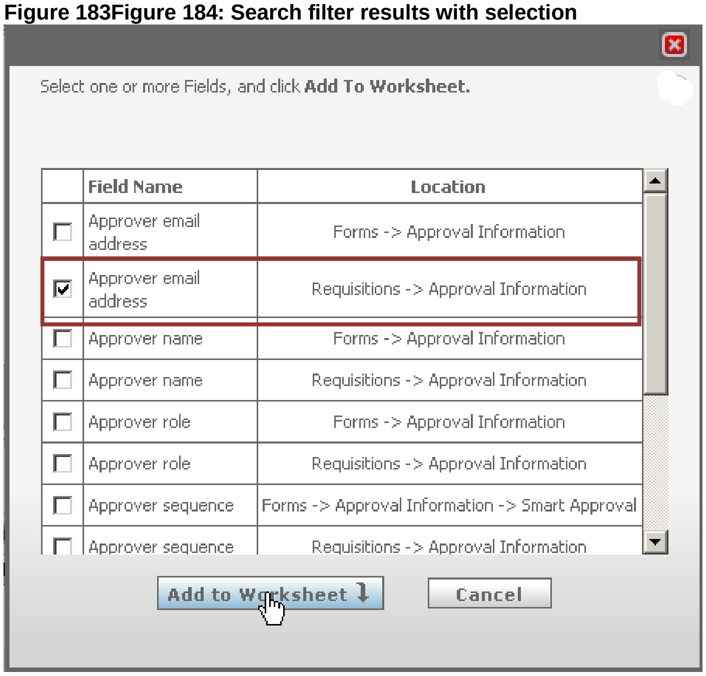
Figure 181Figure 182: Search filter box with search term "Approver"



2. Click **Search**.

3. The search results are displayed in alphabetical order, sorted by name.
4. Select one or more filters / output fields in the results window.
5. Click **Add to Worksheet**.

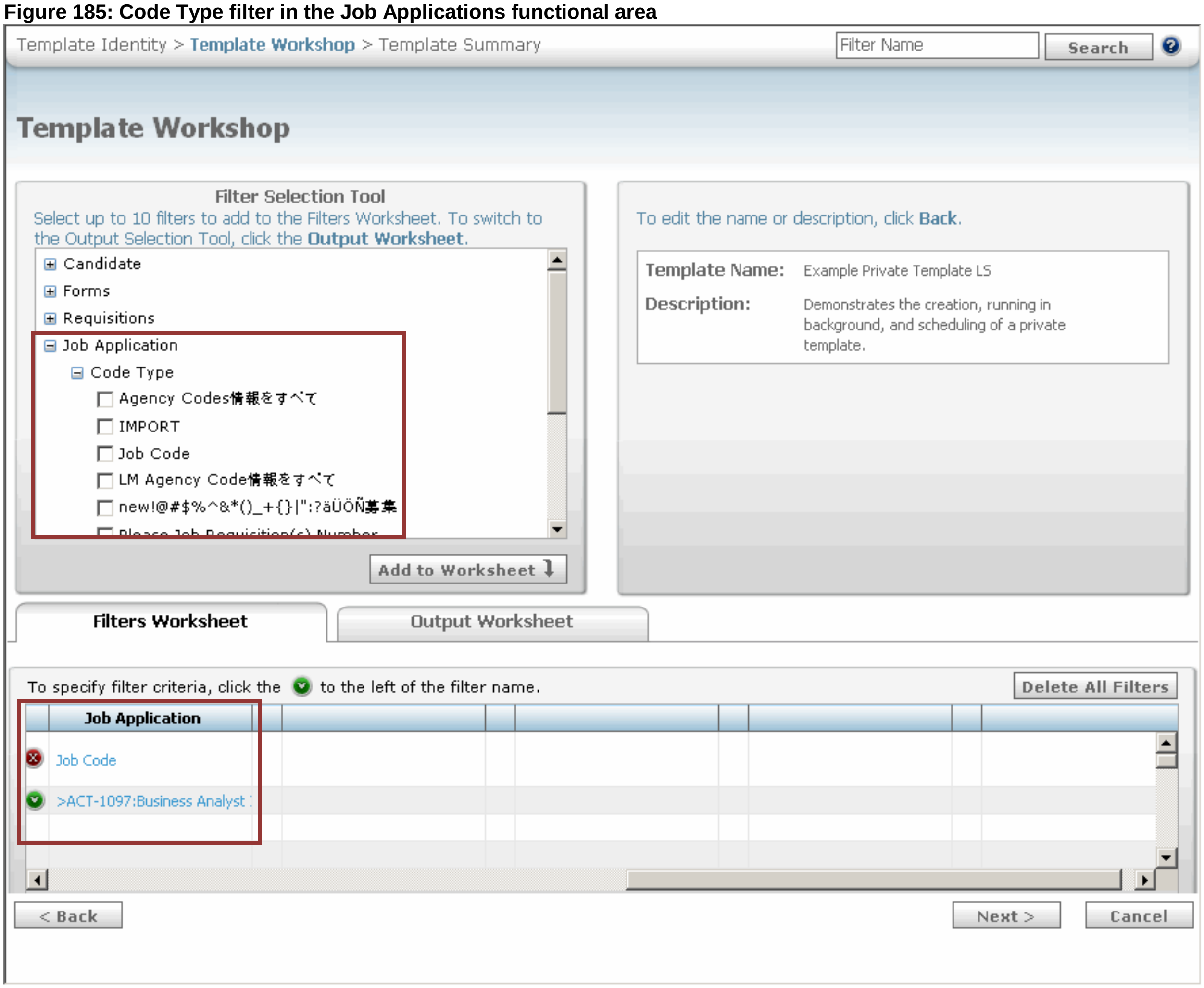
Figure 183Figure 184: Search filter results with selection



6. Your selections are added to the worksheet in the last position and the results window closes.
7. In the worksheet, select filter criteria for this filter.

Adding Filters for Code Types

Figure 185: Code Type filter in the Job Applications functional area



Reporting on Code Description and Code Type

The Job Application functional area includes filters and output fileds for Code Description and Code Type.

Table 9: Job Application functional area includes Code Description and Code Type

Main Functional Area	Secondary Functional Area	Output Field / Filter	Output	Filter	Role
Job Application	Code Type		Yes	No	No
		Lists All the Code Types (Standard, User Defined, Agency)	No	YES	YES
	Site	Site Name	YES	YES	YES
		Site Type	YES	YES	YES

		GQ Name	YES	YES	YES
	General				
		Gateway Submission	Yes	Yes	Yes
		Job Submission	Yes	Yes	Yes
		Code	Yes	No	No
		*Code Description **[New in R12.2]**	Yes	No	No
		Code Type **[New in R12.2]**	Yes	No	No
		Candidate Type	YES	YES	YES

Reporting on KRB Approval Data

The Forms and Requisitions functional areas include filters and output fields for the KRB approval process.

Table 10: Forms functional area – KRB approvals filters and output fields

Main Functional Area	Filters/Output Fields	Output	Filter	Security
Approval Information	Approver name	Yes	Yes	Yes
	Approver email address	Yes	Yes	Yes
	Approver role	Yes	Yes	Yes
	Approver comment	Yes	No	No
	Approver status	No	Yes	Yes
	Approver status updated on	Yes	Yes	Yes

Table 11: Requisitions functional area – KRB approvals filters and output fields

Category	Sub-Category	Fields	Output	Filter	Security
		Approver name	Yes	Yes	Yes
		Approver email address	Yes	Yes	Yes
		Approver role	Yes	Yes	Yes
		Approver comment	Yes	No	No
		Approver status	No	Yes	Yes
		Approver status updated on	Yes	Yes	Yes
		Approver sequence	Yes	Yes	Yes
	Approver	Pending	Yes	No	No

	Status Pipeline	Approved	Yes	No	No
		Declined	Yes	No	No

Reporting on SmartApproval Data

The Forms and Requisitions functional areas include SmartApproval filters and output fields.

Table 12: Forms functional area – SmartApproval filters and output fields

Main Functional Area	Filters/Output Fields	Output	Filter	Security
*Smart Approval Fields	Alternative for	Yes	Yes	Yes
	Workflow	Yes	Yes	Yes
	Approver sequence	Yes	Yes	Yes
	Express Approve	Yes	Yes	Yes

Table 13: Requisitions functional area – SmartApproval filters and output fields

Category	Sub-Category	Fields	Output	Filter	Security
Approval Information	*Smart Approval	Alternative for	Yes	Yes	Yes
		Workflow	Yes	Yes	Yes
		Express Approve	Yes	Yes	Yes

Filters and Output Fields

Candidates

Main Functional Area	Secondary Functional Area	Fields/Filters	Output	Filter	Security
Candidate	Contact Info	First name	Yes	Yes	Yes
		Last name	Yes	Yes	Yes
		Middle Name	Yes	Yes	Yes
		Location	Yes	Yes	Yes
		Address 1	Yes	Yes	Yes
		Address 2	Yes	Yes	Yes
		City	Yes	Yes	Yes
		Country	Yes	Yes	Yes
		Zip/postal code	Yes	Yes	Yes
		Email	Yes	Yes	Yes
		Home Page	Yes	Yes	Yes
		Home phone	Yes	Yes	Yes
		Other phone	Yes	Yes	Yes
		Work phone	Yes	Yes	Yes
		Fax Number	Yes	Yes	Yes
Candidate	System Information	Added On	Yes	Yes	Yes
		Candidate ref num	Yes	Yes	Yes
		Last codes	Yes	Yes	Yes
		Date last loaded	Yes	Yes	Yes
		Viewed by Current User	Yes	Yes	Yes
		Viewed by Any User	Yes	Yes	Yes
		Viewed By	Yes	Yes	Yes
		Viewed On	Yes	Yes	Yes
Candidate	Notes	Added by	Yes	Yes	Yes
		Date added	Yes	Yes	Yes
		Note text	Yes	No	No
		Type	Yes	Yes	Yes
		Reminder Date	Yes	Yes	Yes
Candidate	Education	Degree	Yes	Yes	Yes
		Educational institute	Yes	Yes	Yes
		GPA	Yes	Yes	Yes

		Grad year	Yes	Yes	Yes
		Field of study	Yes	Yes	Yes
		Most Recent Education	Yes	Yes	Yes
Candidate	Employment History	Employer	Yes	Yes	Yes
	Select "ALL", "Most Recent" on Role and Template Filter	Position held	Yes	Yes	Yes
		Start Year	Yes	Yes	Yes
		End Year	Yes	Yes	Yes
		Most Recent Employment	Yes	Yes	Yes
		Sequence	No	No	No
Candidate	Candidate Type	Current	Yes	Yes	Yes
		Original	Yes	Yes	Yes
Candidate	Interview Scheduling	Interviewer e-mail	Yes	Yes	Yes
		Scheduled/Requested by	Yes	Yes	Yes
		Interview Status	Yes	Yes	Yes
		For (Title/Folder name)	Yes	Yes	Yes
		Date/Time of interview	Yes	Yes	Yes
		Date/Time requested	Yes	Yes	Yes
		Date/Time updated	Yes	Yes	Yes
		Total time to schedule	Yes	No	No
		Interview time zone	Yes	Yes	Yes
Candidate	Employee Referral	Referral status	Yes	Yes	Yes
		Referral status date	Yes	Yes	Yes
		Referral status description	Yes	Yes	Yes
		Referral submission date	Yes	Yes	Yes
		Referrer e-mail	Yes	Yes	Yes
		Referrer first name	Yes	Yes	Yes
		Referrer last name	Yes	Yes	Yes
Candidate	eLinks	Recipient e-mail	Yes	Yes	Yes
		Response	Yes	Yes	Yes
		Elink Sender	Yes	Yes	Yes
		Elink - For (Title/Folder name)	Yes	Yes	Yes
		Elink Type	Yes	Yes	Yes
		Date/Time responded	Yes	Yes	Yes
		Date/Time sent	Yes	Yes	Yes

		Date/Time viewed	Yes	Yes	Yes
Candidate	Communications	Date sent	Yes	Yes	Yes
		Communications - For (Title/Folder name)	Yes	Yes	Yes
		Communication Sender	Yes	Yes	Yes
		Communication Status	Yes	Yes	Yes
		Template name	Yes	Yes	Yes
		Type	Yes	Yes	Yes

Forms

Main Functional Area	Filters/Output Fields	Output	Filter	Security
General Fields	Form name	Yes	Yes	Yes
	Form approval status	Yes	Yes	Yes
	Form approval status updated on	Yes	No	No
*Smart Approval Fields	Alternative for	Yes	Yes	Yes
	Workflow	Yes	Yes	Yes
	Approver sequence	Yes	Yes	Yes
	Express Approve	Yes	Yes	Yes
Approval Information	Approver name	Yes	Yes	Yes
	Approver email address	Yes	Yes	Yes
	Approver role	Yes	Yes	Yes
	Approver comment	Yes	No	No
	Approver status	No	Yes	Yes
	Approver status updated on	Yes	Yes	Yes
Form Fields	[Varies by organization]	Yes	Yes	Yes
Approver Status Pipeline	Pending	Yes	No	No
	Approved	Yes	No	No
	Declined	Yes	No	No

*Smart Approval

SmartApproval filters and fields do not display if your organization does not use SmartApproval.

You can report on only the most recent instance for SmartApproval.

The template results do not display the following:

- KRB approval groups that were bypassed.

- Deactivated SmartApproval approvers.

If you include general form data with form fields, output is displayed in multiple rows.

Requisitions

Category	Sub-Category	Fields	Output	Filter	Security
General Fields		AutoReqID	Yes	Yes	Yes
		Optional Req Id	Yes	Yes	Yes
		Requisition Notes	Yes	No	No
		Department	Yes	Yes	Yes
		Job Code	Yes	Yes	Yes
		Employee Name	Yes	Yes	Yes
		Location	Yes	Yes	Yes
		Job Description	Yes	No	No
		Title	Yes	Yes	Yes
		Days on hold	Yes	No	No
		Days open	Yes	No	No
		Req Form name	Yes	Yes	Yes
		Req Status	NO	Yes	Yes
		Current Req Status	YES	NO	NO
		Added By	Yes	Yes	Yes
		My Reqs	NO	Yes	Yes
		Language	YES	YES	YES
Approval Information	*Smart Approval	Alternative for	Yes	Yes	Yes
		Workflow	Yes	Yes	Yes
		Express Approve	Yes	Yes	Yes
		Approver name	Yes	Yes	Yes
		Approver email address	Yes	Yes	Yes
		Approver role	Yes	Yes	Yes
		Approver comment	Yes	No	No
		Approver status	No	Yes	Yes
		Approver status updated on	Yes	Yes	Yes
		Approver sequence	Yes	Yes	Yes

	Approver Status Pipeline	Pending	Yes	No	No
		Approved	Yes	No	No
		Declined	Yes	No	No
Dates		Date Approved	Yes	Yes	
		Date Canceled	Yes	Yes	Yes
		Date closed	Yes	Yes	Yes
		Date created	Yes	Yes	Yes
		Date deleted	Yes	Yes	Yes
		Date on hold	Yes	Yes	Yes
		Date open	Yes	Yes	Yes
		Start date	Yes	Yes	Yes
		Req Status pipeline: Pending	Yes	No	No
		Req Status pipeline: Open	Yes	No	No
		Req Status pipeline: On Hold	Yes	No	No
		Req Status pipeline: Deleted	Yes	No	No
		Req Status pipeline: Declined	Yes	No	No
		Req Status pipeline: Closed	Yes	No	No
		Req Status pipeline: Canceled	Yes	No	No
		Req Status pipeline: Approved	Yes	No	No
Costs		Advertising Costs	Yes	Yes	Yes
		Relocation Costs	Yes	Yes	Yes
		HR Department Recruiter Costs	Yes	Yes	Yes
		Travel Costs	Yes	Yes	Yes
		Referral Bonus	Yes	Yes	Yes
		External/Agency	Yes	Yes	Yes
Position		No. of Positions	Yes	Yes	Yes
		Positions remaining	Yes	Yes	Yes
Req Team	All Req Team Members	First name	Yes	Yes	Yes
		Last name	Yes	Yes	Yes
		Full name	Yes	Yes	Yes
		Employee ID	Yes	Yes	Yes
		Job title	Yes	Yes	Yes
		Department	Yes	Yes	Yes

		Email address	Yes	Yes	Yes
		Phone number	Yes	Yes	Yes
		Fax number	Yes	Yes	Yes
		Country	Yes	Yes	Yes
		Language	Yes	Yes	Yes
		User name	Yes	No	No
		Remote login ID	Yes	Yes	Yes
		User type	Yes	Yes	Yes
		User group	Yes	Yes	Yes
		Org group(s)	Yes	Yes	Yes
		Role(s)	Yes	Yes	Yes
	Manager	Firist name	Yes	Yes	Yes
		Last name	Yes	Yes	Yes
		Full name	Yes	Yes	Yes
		Employee ID	Yes	Yes	Yes
		Job title	Yes	Yes	Yes
		Department	Yes	Yes	Yes
		Email address	Yes	Yes	Yes
		Phone number	Yes	Yes	Yes
		Fax number	Yes	Yes	Yes
		Country	Yes	Yes	Yes
		Language	Yes	Yes	Yes
		User name	Yes	No	No
		Remote login ID	Yes	Yes	Yes
		User type	Yes	Yes	Yes
		User group	Yes	Yes	Yes
		Org group(s)	Yes	Yes	Yes
		Role definition	Yes	Yes	Yes
	Recruiter	Firist name	Yes	Yes	Yes
		Last name	Yes	Yes	Yes
		Full name	Yes	Yes	Yes
		Employee ID	Yes	Yes	Yes
		Job title	Yes	Yes	Yes

		Department	Yes	Yes	Yes
		Email address	Yes	Yes	Yes
		Phone number	Yes	Yes	Yes
		Fax number	Yes	Yes	Yes
		Country	Yes	Yes	Yes
		Language	Yes	Yes	Yes
		User name	Yes	No	No
		Remote login ID	Yes	Yes	Yes
		User type	Yes	Yes	Yes
		User group	Yes	Yes	Yes
		Org group(s)	Yes	Yes	Yes
		Role definition	Yes	Yes	Yes
Type			Yes	Yes	Yes
		Req Type	Yes	Yes	Yes
		College	Yes	Yes	Yes
		Add type	Yes	Yes	Yes
		Position	Yes	Yes	Yes
Posting Details		Site name	Yes	Yes	Yes
		Planned removal date	Yes	Yes	Yes
		Actual removal date	Yes	Yes	Yes
		Total days posted	Yes	No	No
		Date Req Posted	Yes	Yes	Yes
		Target Score	YES	YES	NO
		Featured Job	YES	YES	NO
Custom <Form Title>		<Form Field>	Yes	Yes	Yes
Common <Form Title>		<Form Field>	Yes	Yes	Yes
Subsidiary Forms <Form Title>		<Form Field>: Exists	Yes	Yes	Yes
		<Form Field>: Status (i.e., active/inactive)	Yes	Yes	Yes
		<Form Field>: <Form Field>	Yes	Yes	Yes
Addendum Forms <Form Title>		<Form Field>: Exists	Yes	Yes	Yes
		<Form Field>: Status (i.e., active/inactive)	Yes	Yes	Yes

		<Form Field>: <Form Field>	Yes	Yes	Yes
Search Log		Search Date	Yes	Yes	No
		Search Type	Yes	No	No
		Search Reason	Yes	Yes	No
		Search Criteria	Yes	No	No
		Searched By	Yes	No	No

*Smart Approval

SmartApproval filters and fields do not display if your organization does not use SmartApproval.
You can report on only the most recent instance for Smart Approval.
The template results do not display the following:

- KRB approval groups that were bypassed.
- Deactivated Smart Approval approvers.

If you include general form data with form fields, output is displayed in multiple rows.

Job Application

Main Functional Area	Secondary Functional Area	Output Field / Filter	Output	Filter	Role
Job Application	Code Type		Yes	No	No
		Lists All the Code Types (Standard, User Defined, Agency)	No	YES	YES
	Site	Site Name	YES	YES	YES
		Site Type	YES	YES	YES
		GQ Name	YES	YES	YES
	General				
		Gateway Submission	Yes	Yes	Yes
		Job Submission	Yes	Yes	Yes
		Code	Yes	No	No
		*Code Description **[New in R12.2]**	Yes	No	No
		Code Type **[New in R12.2]**	Yes	No	No
		Candidate Type	YES	YES	YES
		Date applied	YES	YES	YES
		How Received	YES	YES	YES

	Tracking Logic				
		Current HR status	YES	No	No
		Current HR Status Action date	YES	No	No
		Current HR Status Updated by	YES	No	No
		Current HR Status Updated on	YES	No	No
		HR Status	No	YES	YES
		HR Status Updated by	No	YES	YES
		HR Status Updated on	No	YES	YES
		Status Pipeline	YES	NO	NO

Agency Manager

Main Functional Area	Secondary Functional Area	Grouping	Output Field/Filter	Output	Filter	Security
Agency Manager	Agency	General	Agency code	Yes	Yes	Yes
			Agency name	Yes	Yes	Yes
			Preferred agency	Yes	Yes	Yes
			Description	Yes	Yes	Yes
			Specialization	Yes	Yes	Yes
			Fee structure	Yes	Yes	Yes
			Referral period	Yes	Yes	Yes
			Associated Agency Manager(s)	Yes	Yes	Yes
			Vendor Code	Yes	Yes	Yes
			Agreement start date	Yes	Yes	Yes
			Agreement end date	Yes	Yes	Yes
			Post past agreement end date	Yes	Yes	Yes
			Agency notes	Yes	Yes	Yes
		Contact Info	Main contact	Yes	Yes	Yes
			Main phone	Yes	Yes	Yes
			Address 1	Yes	Yes	Yes
			Address 2	Yes	Yes	Yes
			City	Yes	Yes	Yes
			Location	Yes	Yes	Yes
			Zip/postal code	Yes	Yes	Yes

			Country	Yes	Yes	Yes
		Agency History	Added by	Yes	Yes	Yes
			Added on	Yes	Yes	Yes
			Edited by	Yes	Yes	Yes
			Edited on	Yes	Yes	Yes
	Agency Contact	Contact Info	First name	Yes	Yes	Yes
			Last name	Yes	Yes	Yes
			E-mail Address	Yes	No	No
			Contact telephone (main)	Yes	Yes	Yes
			Contact telephone (other)	Yes	Yes	Yes
			Address 1	Yes	Yes	Yes
			Address 2	Yes	Yes	Yes
			City	Yes	Yes	Yes
			Location	Yes	Yes	Yes
			Zip/postal code	Yes	Yes	Yes
			Country	Yes	Yes	Yes
		Contact History	Added by	Yes	Yes	Yes
			Added on	Yes	Yes	Yes
			Edited by	Yes	Yes	Yes
			Edited on	Yes	Yes	Yes
	Agency Candidate		Status	Yes	Yes	Yes
			Referral period end	Yes	Yes	Yes
			Questions completed	Yes	Yes	Yes
			Latest submission	Yes	Yes	Yes
			Original submission	Yes	Yes	Yes

Online Help

The Data Insight Tool Online Help system has been updated to include R12.1 and R12.2 content in this release.

Security Model

The following clarification was added to the Data Insight Tool documentation:

Security Applied to Public Templates

Only Data Insight Tool Administrative users can create Public Templates. (Non-administrative users do not see the **Make this template public** check box.)

Important! When users run public templates, **the security applied to the template is that of the Data Insight Tool Administrator who created it**.

Integrations

Background Check Integration

Kenexa Recruiter BrassRing introduces two standard integration methods for Background Check. These methods can be combined based on vendor capabilities:

- 2-Step: Interaction takes place through the Background Check vendor's user interface.
- 1-Step: Users can submit screening requests automatically through the KRB user interface.

The Background Check vendors available in November are:

- HireRight – 2-Step
- LexisNexis – 1-Step and 2-Step
- Sterling – 2-Step

Date Available

This feature is available in R12.2, Build 0.
US: November 19, 2009
EU: November 26, 2009

Cost

No additional costs.

Benefits

Provide for easier and standardized integrations across a number of vendors. Streamline the background checking process.

Configuration

The following steps are common to both 1-step and 2-step integration:

1. Create the subscription to the vendor.
2. Select the vendor.
3. Specify the type of integration (1-Step or 2-Step).
4. Add authentication information.
5. Reference an HR Status to initiate the request
6. Map form fields to background check XML schema.

Figure 186: Configure the Subscription and triggers for the Background Check Integration Type

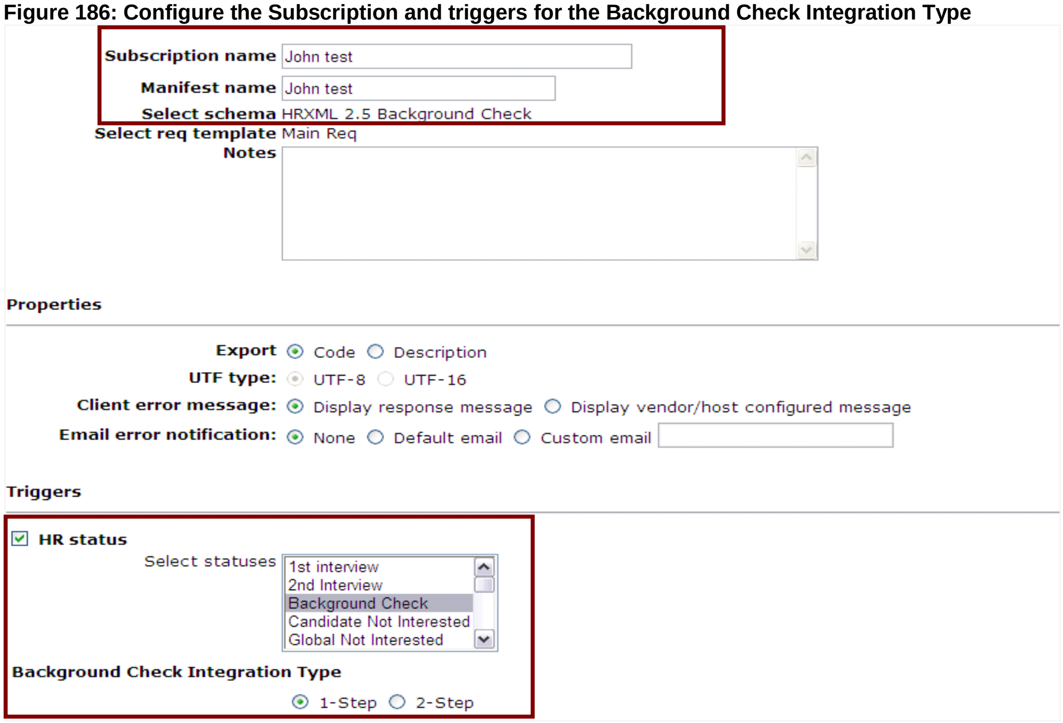


Figure 187: Select a subscriber

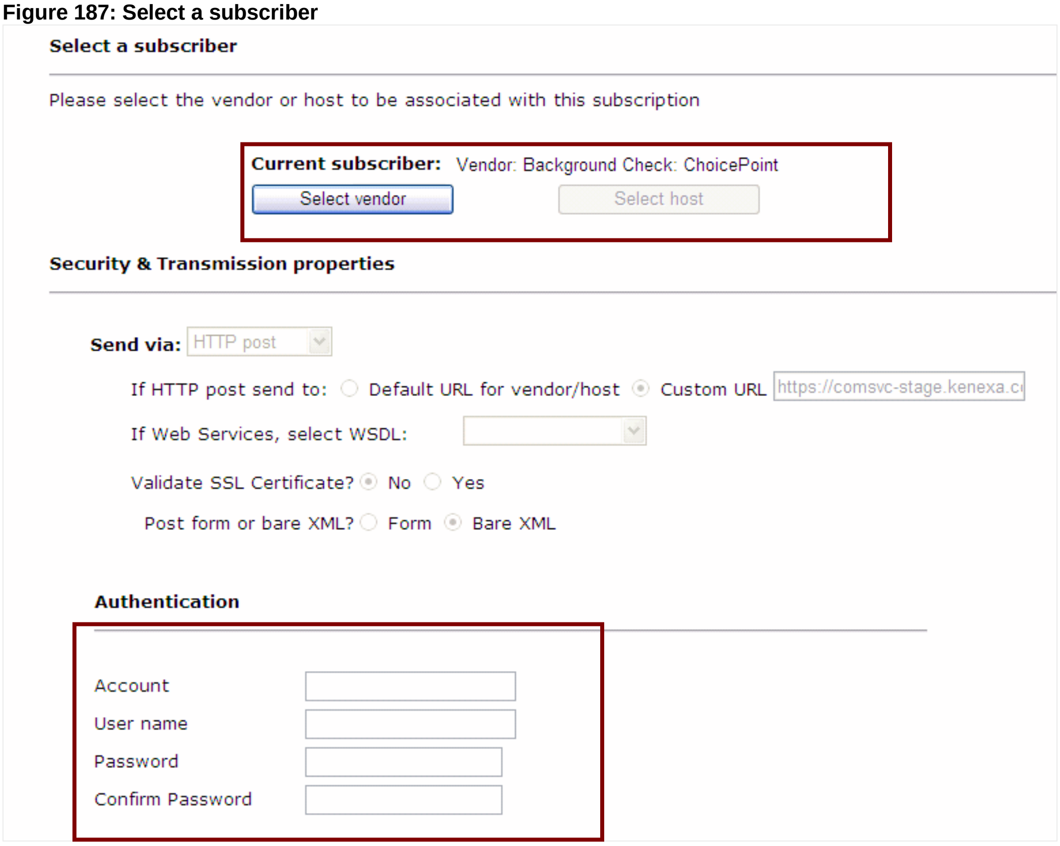
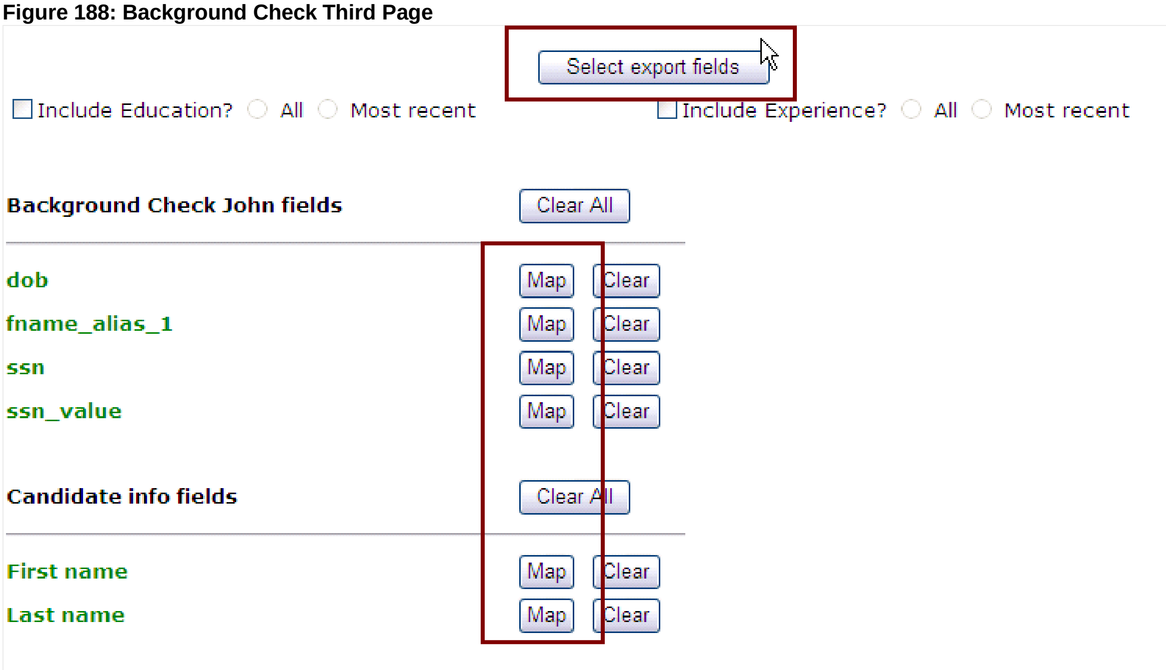


Figure 188: Background Check Third Page



Additional Steps for 1-Step Integration

1. Set up values for packages and screenings on the requisition template (Req form). Once the client setting is enabled, two (2) custom static fields are created automatically.
2. Configure Field Association to associate screenings to package selection.

Figure 189: Set up packages and screening on Req form

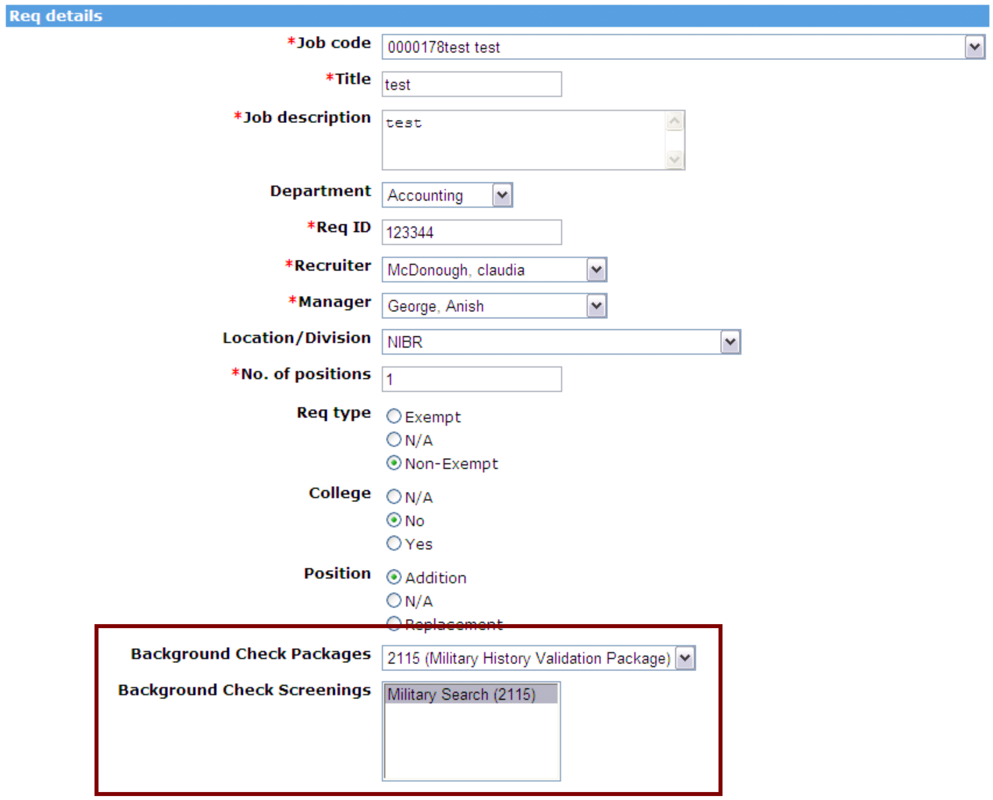
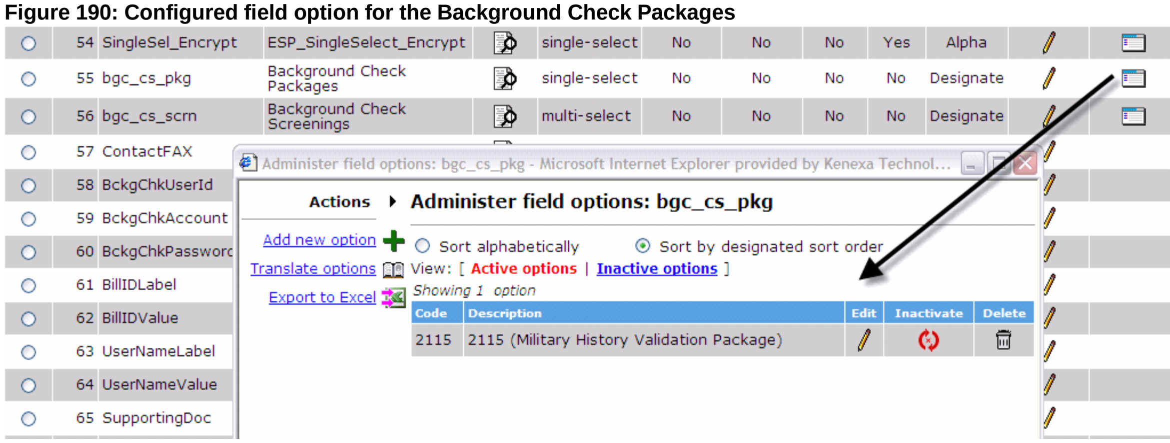
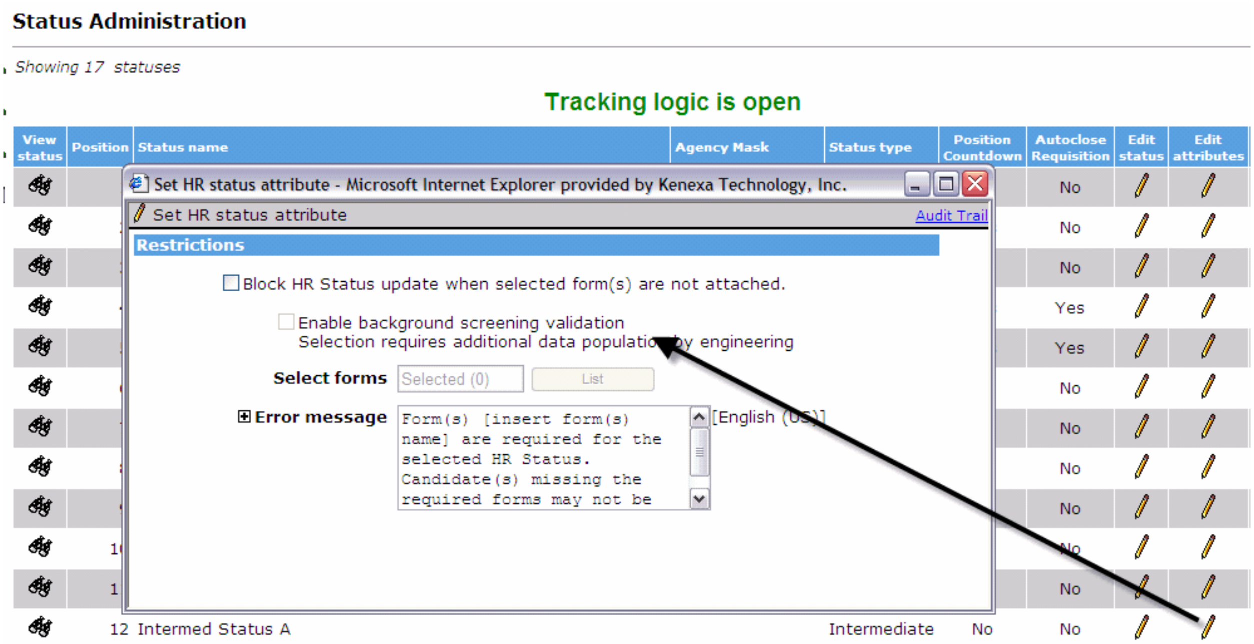


Figure 190: Configured field option for the Background Check Packages



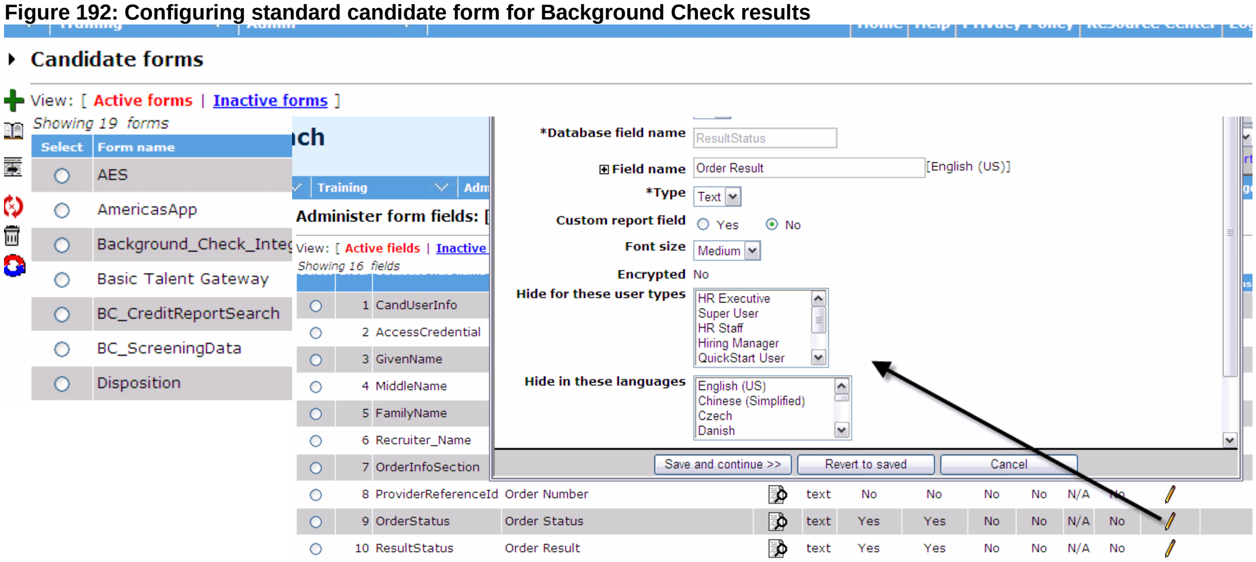
3. Set up any necessary candidate forms for capturing data
    a. Associate selected screenings to forms (based on req)
    b. Block HR Status update if form(s) not available

Figure 191: Enable the Block HR Status update… field



4. Configure a Background Check form to capture the standard results for the background check.
   - Fields can be hidden for certain user types.
   - If results are not returned, the form should be inactivated.

Figure 192: Configuring standard candidate form for Background Check results



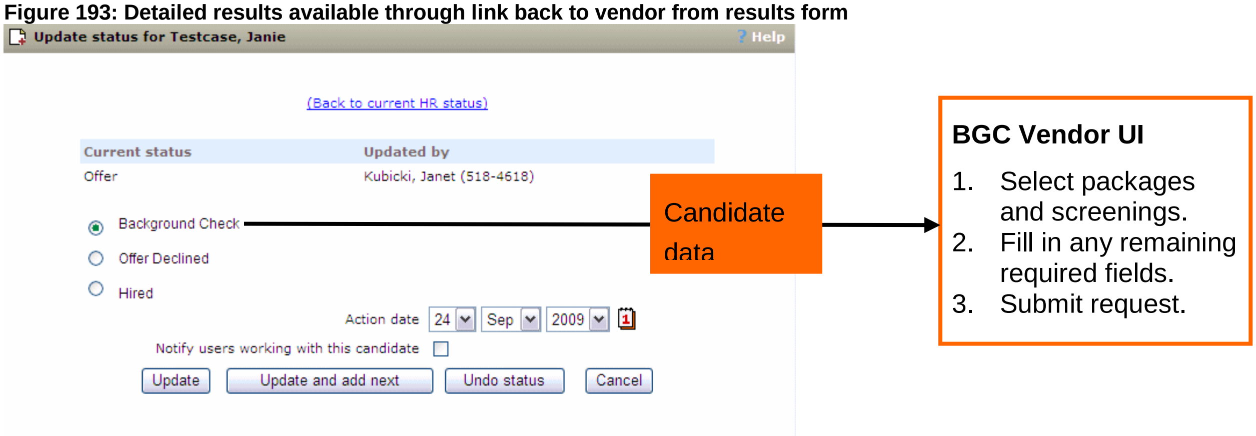
Standard 2-Step Integration

In the 2-step integration, the user is redirected automatically to the vendor's application when he or she sets the candidate to the triggering HR status.

The sequence of events for standard 2-step integration is:

1. Within KRB, the candidate is set to the triggering HR status (for example, Background check).
2. The system requests the background check for the candidate.
3. The system authenticates and redirects the KRB user automatically to the background check's vendor user interface.
4. Meanwhile, KRB passes the available candidate information to the vendor (which is possible through the mapping configuration done at implementation time).
5. In the vendor application, the KRB user selects the package and screenings, enters data into required fields, and submits the request.
6. The basic status and results are updated within the previously configured KRB standard candidate form. Users can see detailed results by clicking a link within the standard candidate form which takes them to the vendor application.

Figure 193: Detailed results available through link back to vendor from results form



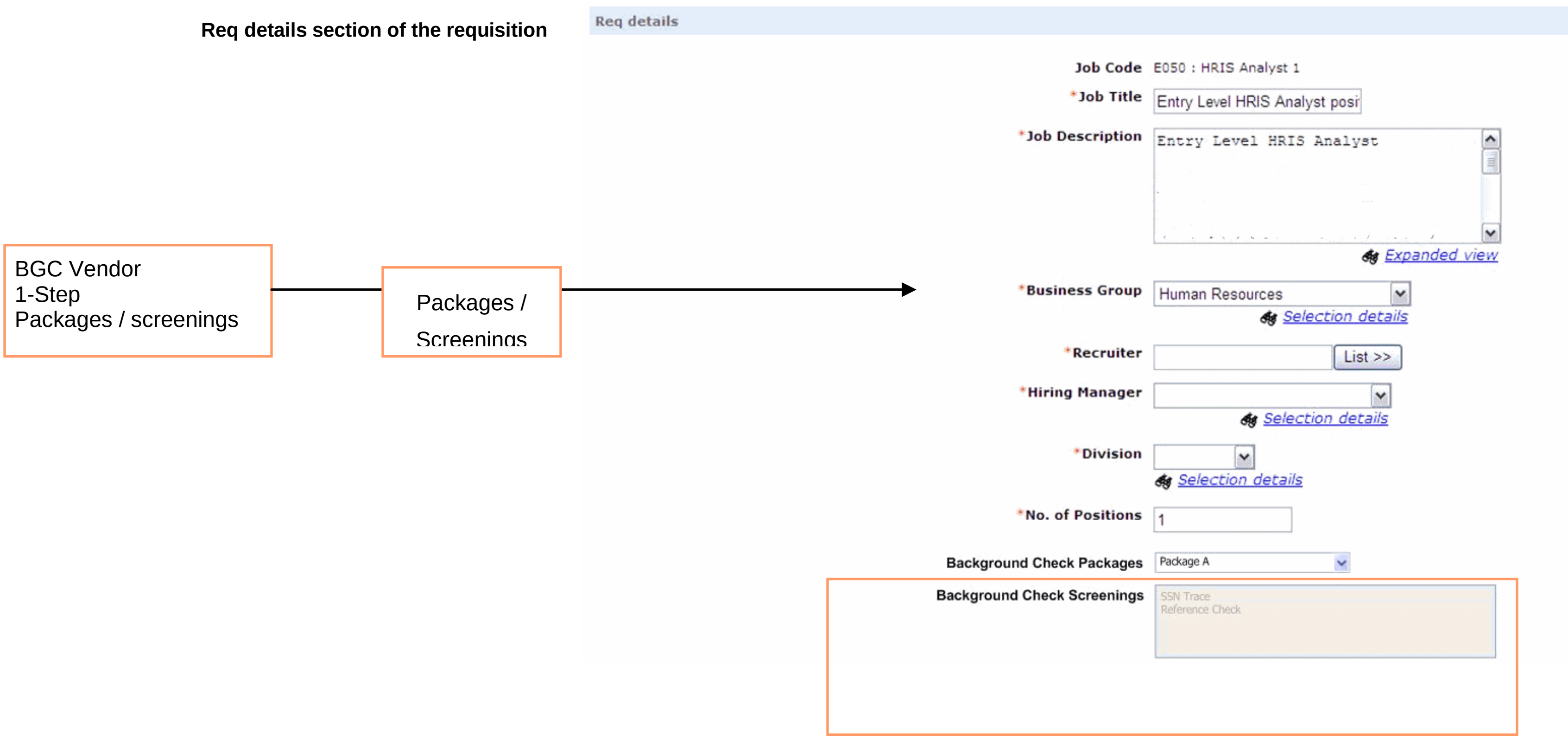
Standard 1-Step Integration

The actual steps are dependent on vendor capabilities.

1. KRB displays the list of available packages and screenings.
2. KRB user select package and screenings with a job in KRB.
3. KRB user sets the candidate's status to the triggering HR status and as a result, KRB requests a background check.
4. The request is submitted in the background in a form that automatically satisfies the vendor application data requirements.
5. The candidate's basic status and results are updated within the preconfigured KRB standard candidate form.
6. Detailed results are available through link back to vendor from the results form.

Please see diagrams on the next few pages.

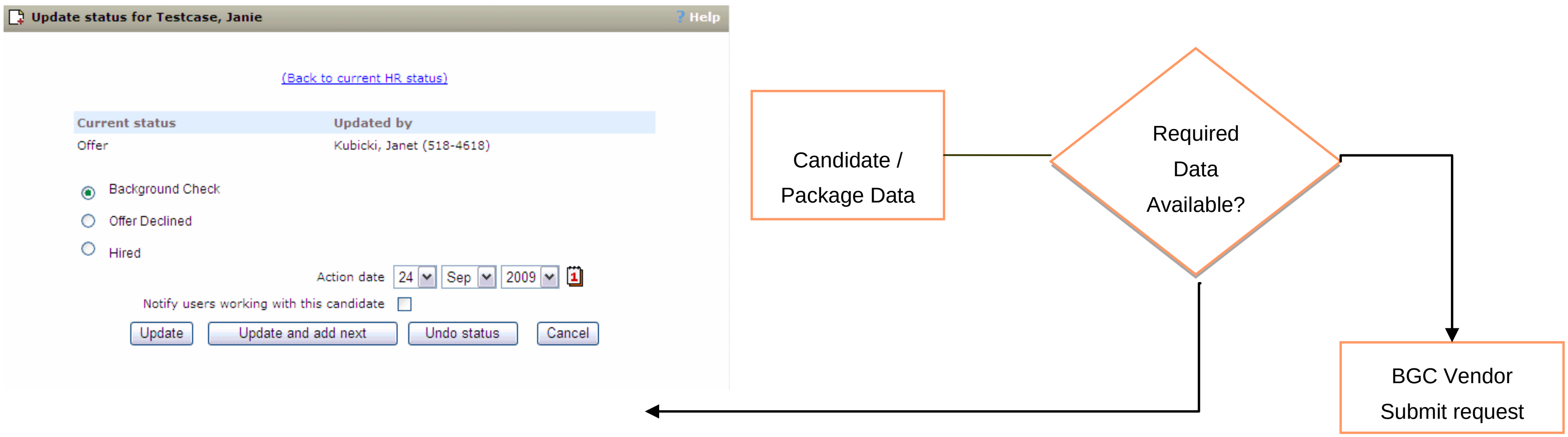
1-Step Integration: Package/Screening Association to Job



1-Step Integration: Package/Screening Association to Job (continued)

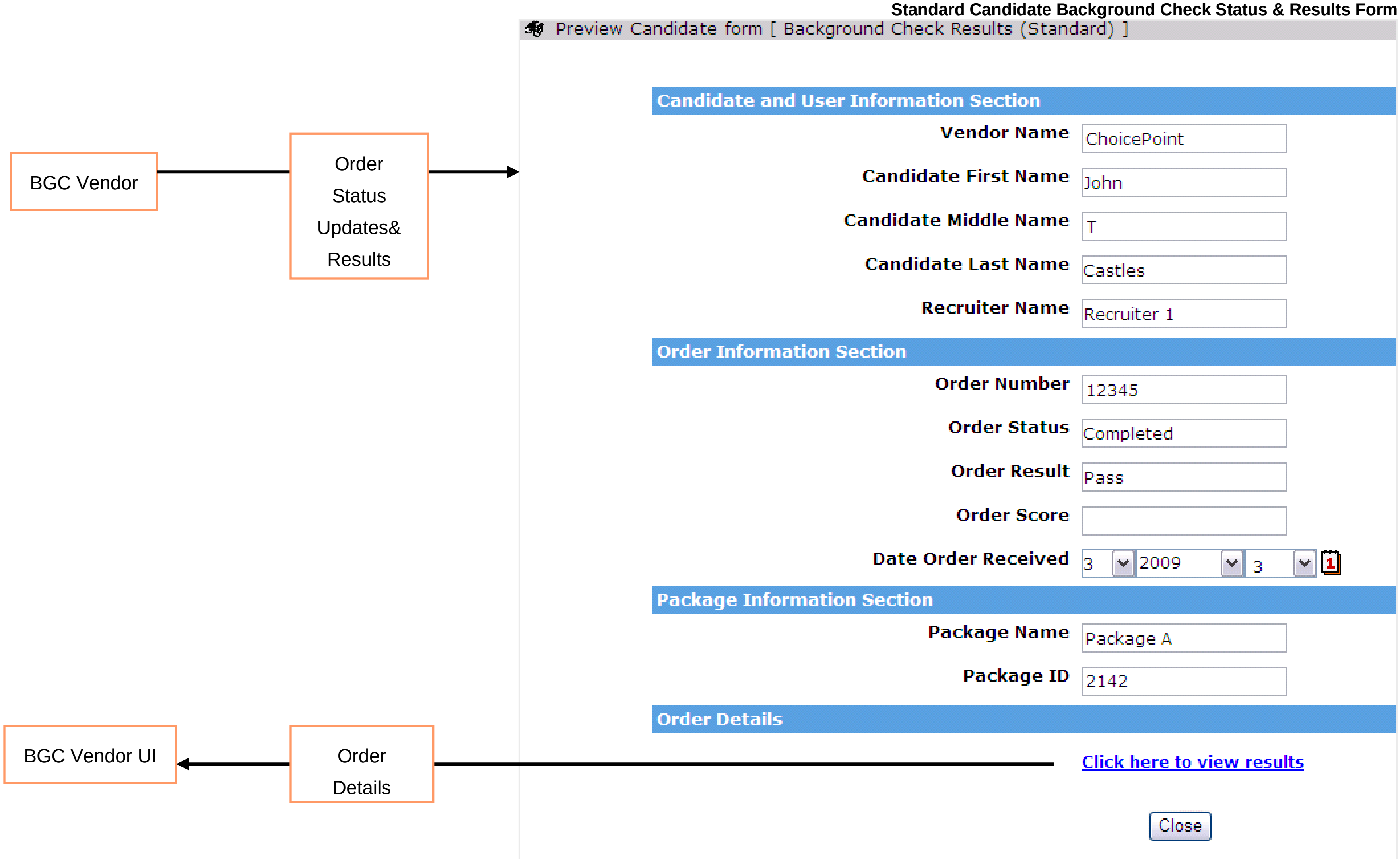
Order Request

Request Background Check via HR Status Update



1-Step and 2-Step Integration: Order Status Updates and Results

Standard Candidate Background Check Status & Results Form

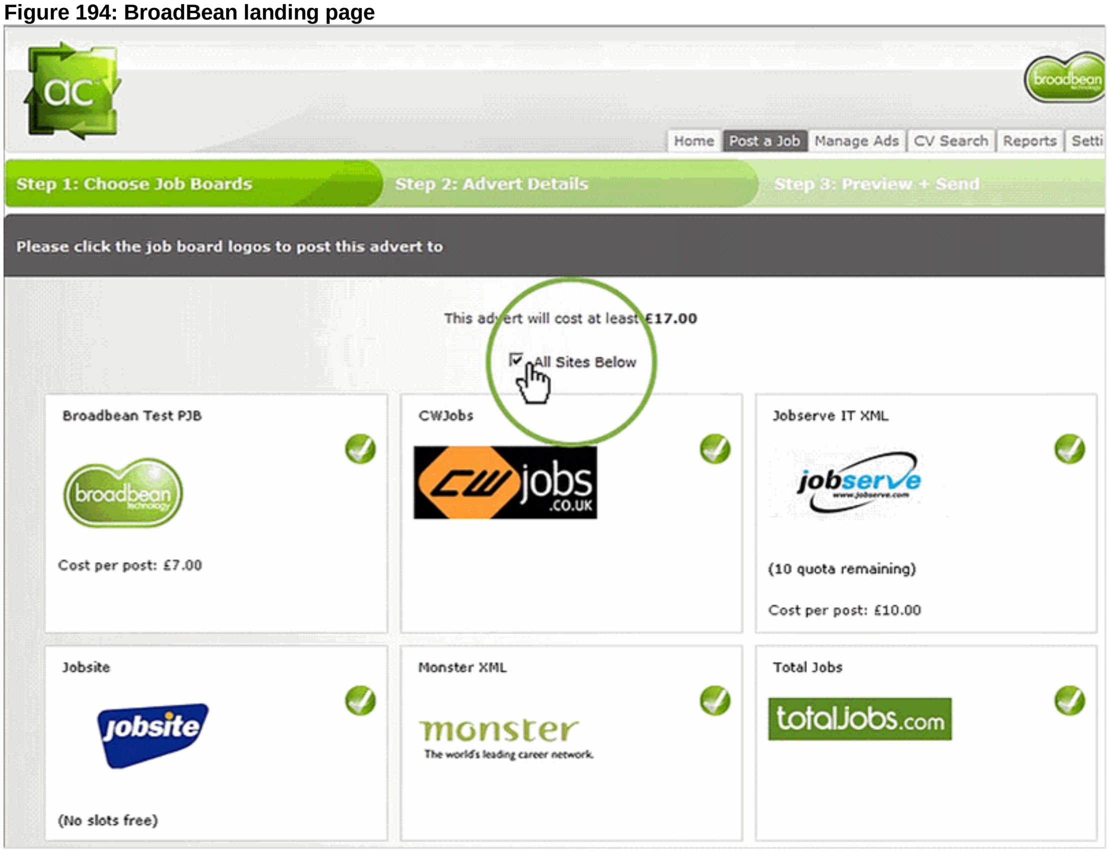


BroadBean Job Distribution

Kenexa Recruiter BrassRing has added BroadBean Job Distribution as a posting partner. To support integration with BroadBean, your organization can:

- Configure custom text in the header and footer
- Pre-populate application URLs to provide seamless application experience
- Remove postings easily
- Derive hiring analytics and reports
- Localize the UI in English, Danish, Dutch, French, German, Italian, Spanish, and Swedish

Figure 194: BroadBean landing page



Date Available

This feature is available in R12.2, Build 0.

US: November 19, 2009

EU: November 25, 2009

Cost

Please contact your Kenexa consultant for information about cost.

Benefits

KRB users can post jobs simultaneously on multiple job boards and receive applications from multiple sources.

Configuration

This procedure is a high-level overview only.

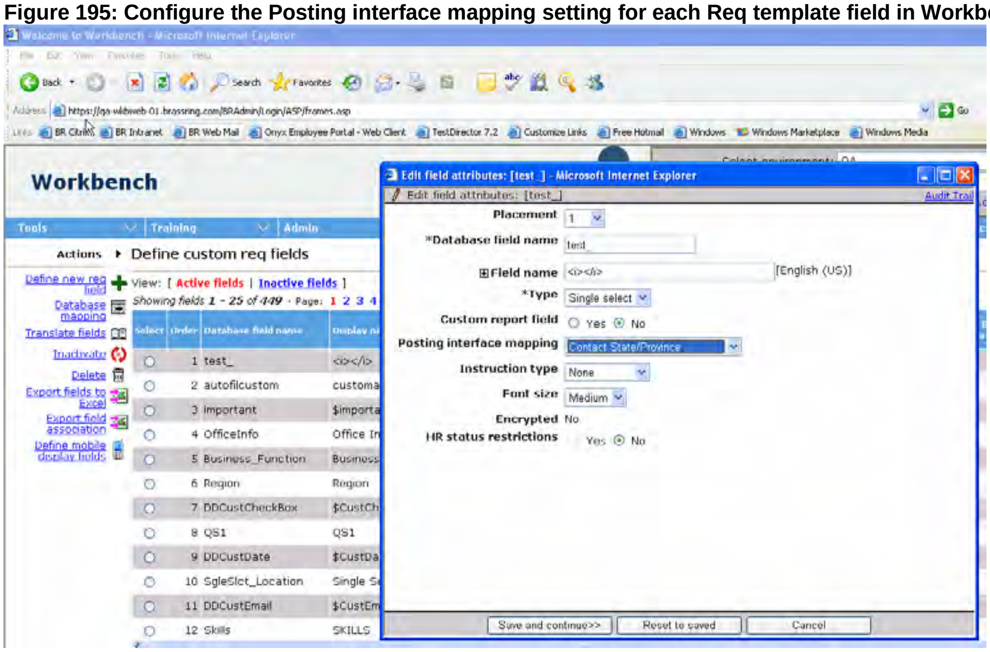
The major configuration steps are:

1. Create requisition templates (“Req forms”) in Workbench for use by BroadBean distribution.
2. Create job categories in Workbench for use by BroadBean distribution.
3. Complete requisition template mapping in Workbench.
4. Complete job category mapping in Workbench?
5. Configure BroadBean as a posting partner in Workbench?
6. Configure Apply URL Gateways
7. Populate drop-down Lists

Complete Requisition Template Mapping in Workbench

1. Select Forms > Reqs > Req forms
2. For each field to be mapped, configure Posting interface mappings in the Edit field attributes window.

Figure 195: Configure the Posting interface mapping setting for each Req template field in Workbench



Complete Job Category Mapping in Workbench

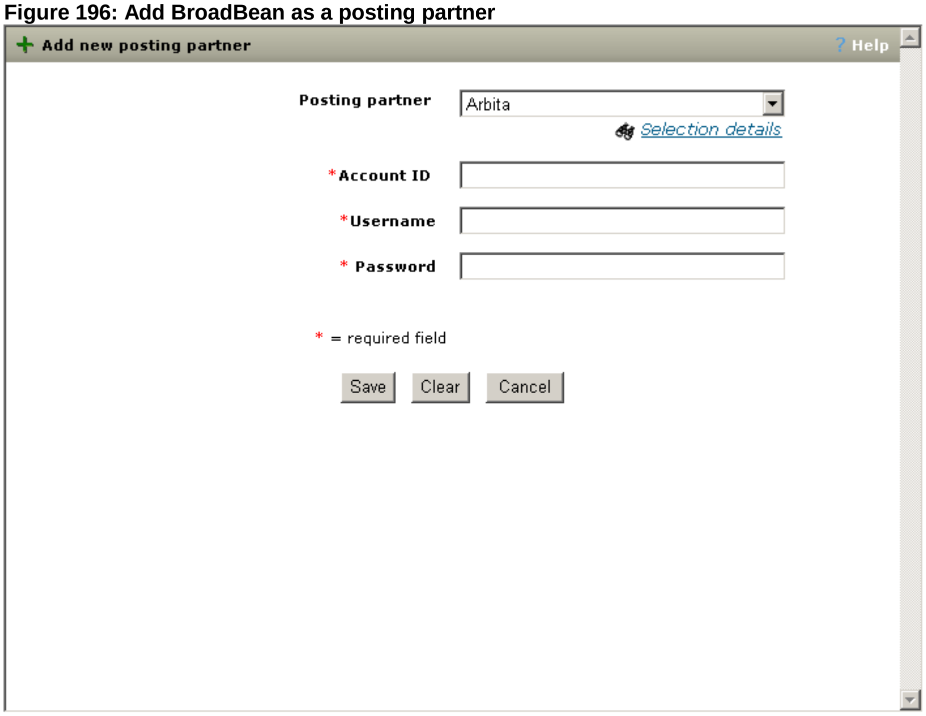
Configure BroadBean as Posting Partner in KRB

You must have the appropriate Admin privileges in KRB to perform this step.

1. In KRB, select **Admin > Posting** interface defaults.

2. Click **Edit my profile**.
3. On the **Edit my posting defaults** page, click **Add new posting partner** in the **Actions** menu.
4. Configure the settings for Broadbean in the **Add new posting partner** window.
5. Click **Save** when you are finished.

Figure 196: Add BroadBean as a posting partner



Configure Apply URL Gateways

Figure 197: Configure Apply URL Gateways

Populate Dropdown Lists

Your Kenexa consultant creates an Onyx ticket to assign this step to KRB Engineering to populate dropdown lists.

Figure 198: Populating dropdown lists

Client ID	Site ID	Display Name	Talent Gateway Name
25172	5239	Corporate Talent Gateway - French / Portail d'Entreprise Talent - Français	Loblaw External French Gateway
25172	5235	Corporate Talent Gateway - Engish / Talent Portail d'Entreprise - Anglais	External English Gateway

User Experience

KRB users use the requisition templates mapped for BroadBean (in configuration step 1 above) to create requisitions.

ResumePal Integration

ResumePal is a universal application form for use by candidates with a United States address and zip code. The address, city, and state are requested but the zip code is required.

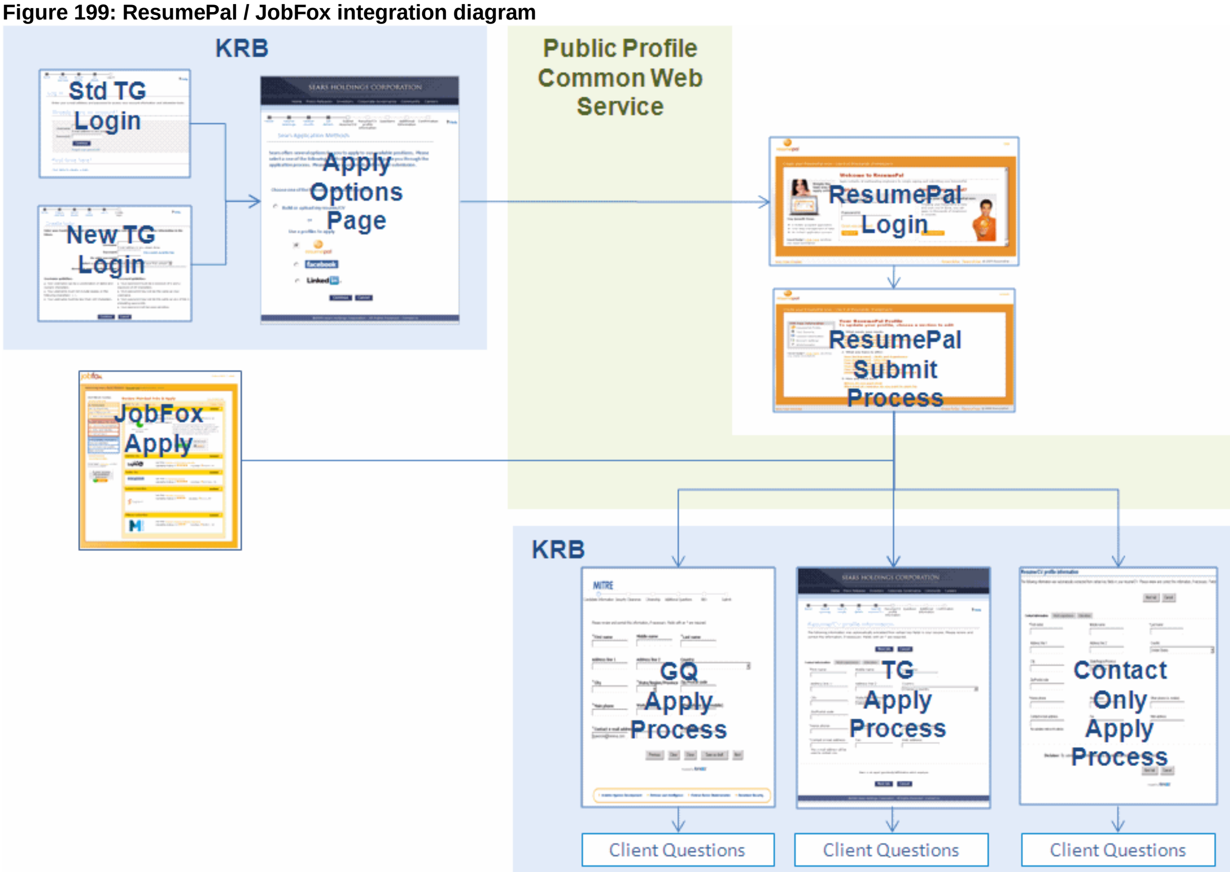
Note: For this release, only US locations are supported for both candidates and job matches.

We agree on your position to add ResumePal to the US gateways regardless of where the company is located and non-US candidates can apply provided they use a US address and zip code.

The integration includes the following processes:

- New or existing ResumePal candidate application directly through the customers Talent Gateways, Global Talent Gateways
- Candidate application directly from JobFox using a ResumePal profile.

Figure 199: ResumePal / JobFox integration diagram



Date Available

This feature is available in R12.2, Build 0.

US: November 19, 2009

EU: November 26, 2009

Cost

Please contact your Kenexa consultant for more information.

Benefits

US candidates can use a single application form to apply to jobs from multiple sources.

Visible Changes

Best Practice Recommendations

Configuration

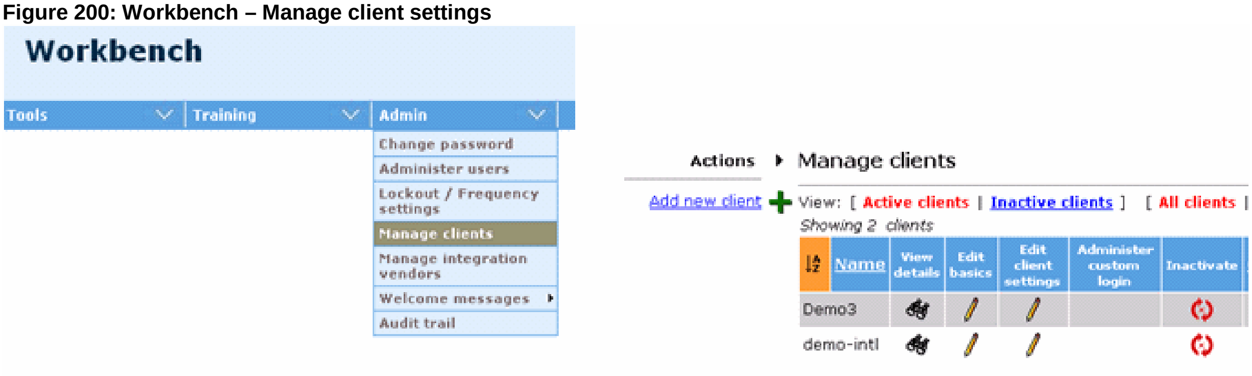
The major configuration steps are:

1. Enable the client setting.
2. Add the Candidate Profile Provider Integration Type
3. Add the subscription.
4. Configure Talent Gateways for ResumePal.
5. Customize text for the Profile Source Page.

Enable the Client Setting

Enable the client setting in Workbench for ResumePal acceptance.

Figure 200: Workbench – Manage client settings

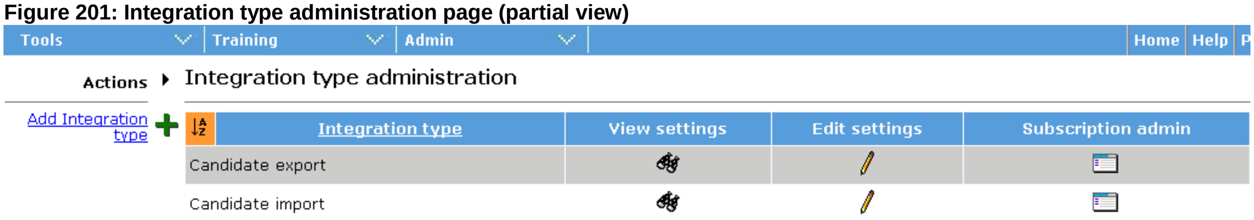


Adding the Candidate Profile Provider Integration Type

The next step is to add an integration type of the type “Candidate profile provider.”

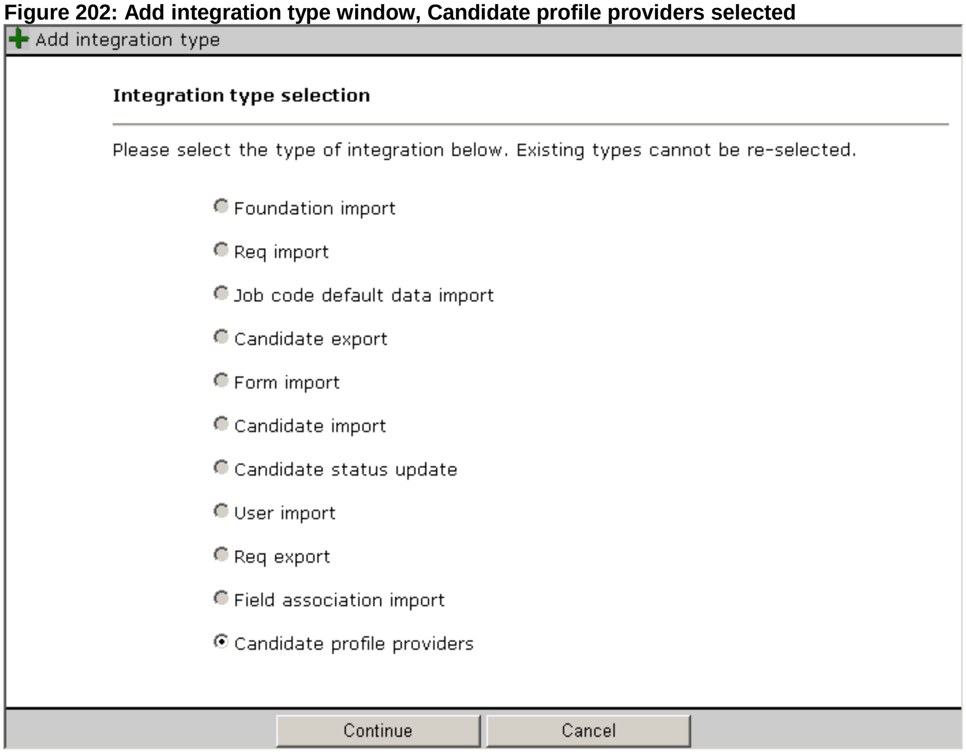
1. In Workbench, select **Tools > Integrations > Administration**. The Integration type administration page opens.

Figure 201: Integration type administration page (partial view)



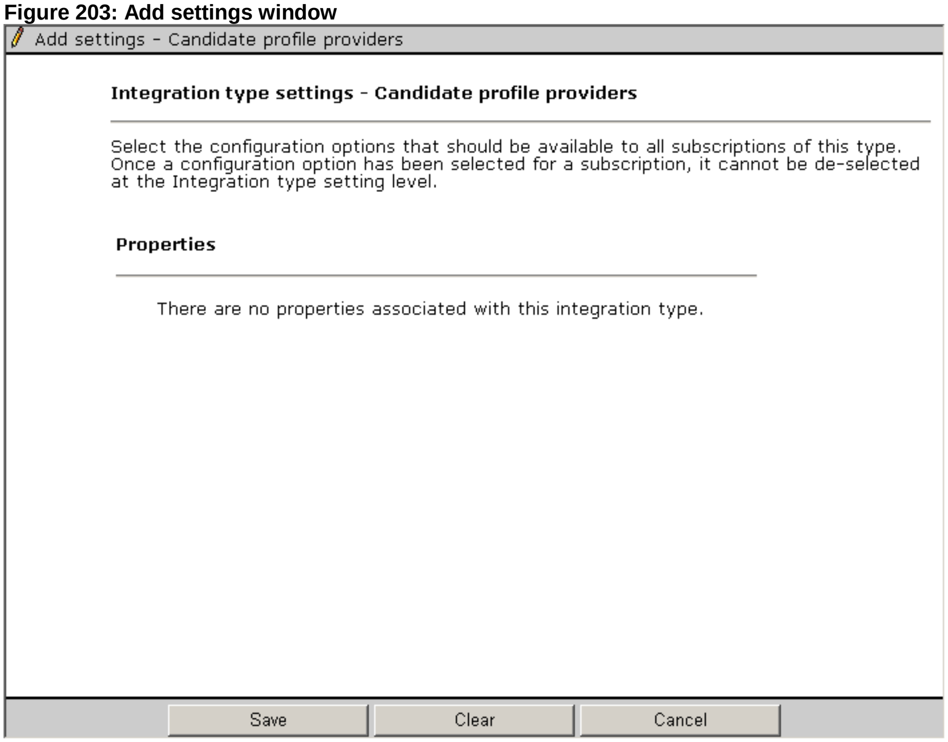
2. Click **Add Integration type** in the **Actions** menu. The **Add integration type** window opens.

Figure 202: Add integration type window, Candidate profile providers selected



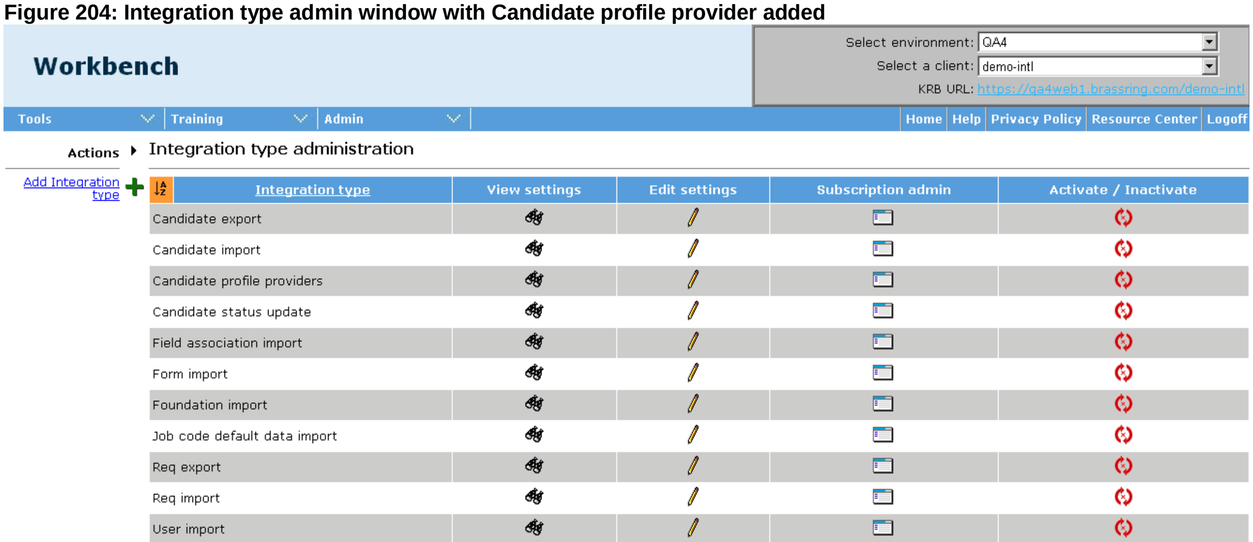
3. Select **Candidate profile providers** as the integration type and clicked **Continue**.
4. The **Add settings – Candidate profile providers** window opens.

Figure 203: Add settings window



5. Click **Save**.
6. The integration type is added to the **Integration type administration** grid.

Figure 204: Integration type admin window with Candidate profile provider added



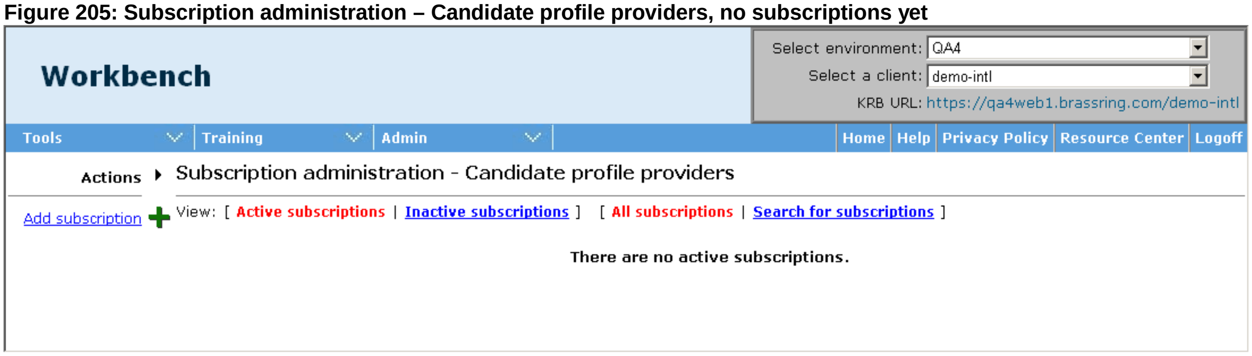
Adding the ResumePal Subscription

The next step is to add the ResumePal subscription.

In Workbench, navigate to the Integration type administration page if you are not there. (Select Tools > Integrations > Administration.)

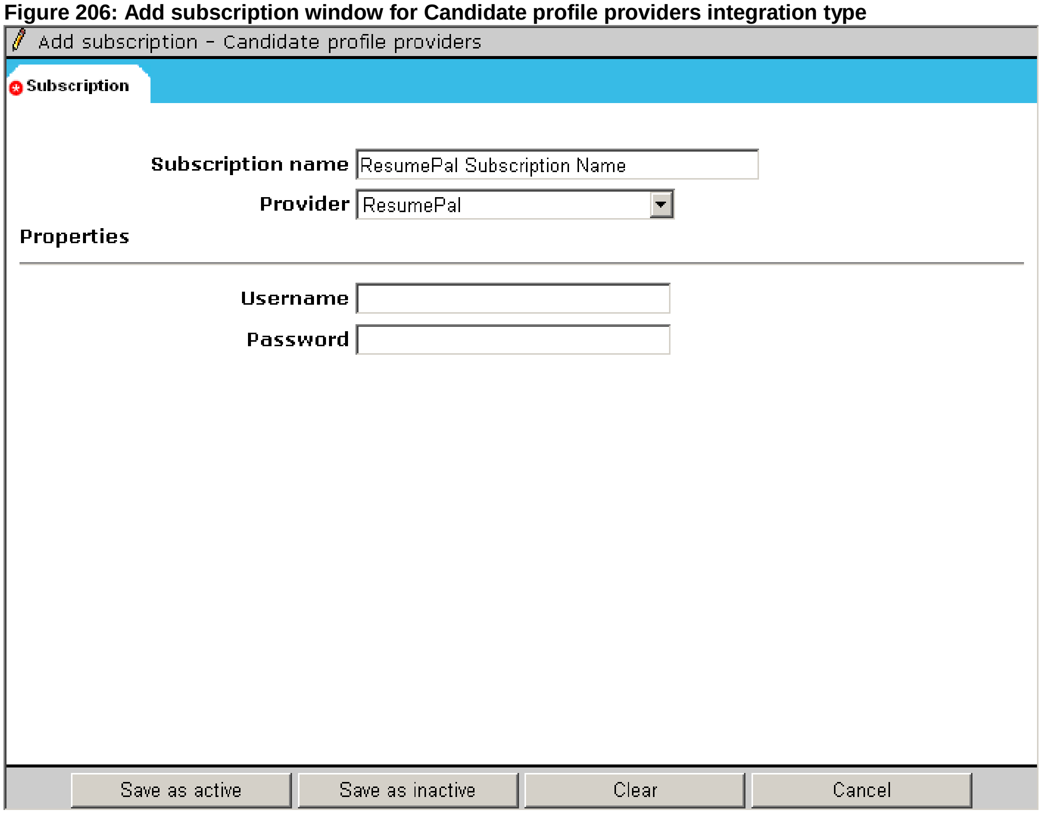
Click the Subscription admin icon for the Candidate profile providers integration type. The Subscription administration window opens for that integration type. (In the example below, no subscriptions have been added yet.)

Figure 205: Subscription administration – Candidate profile providers, no subscriptions yet



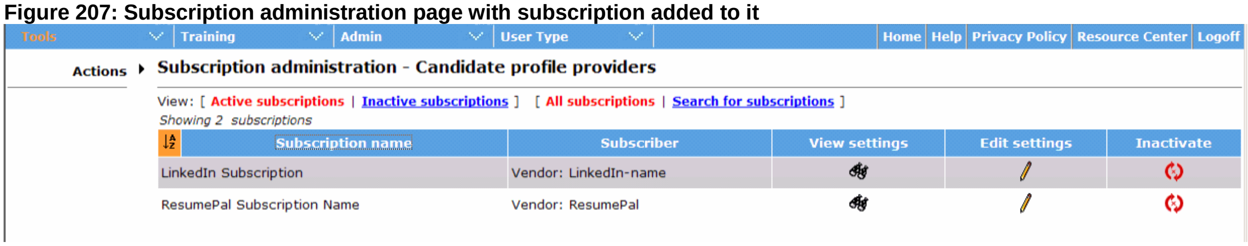
Click **Add subscription**. The **Add subscription** window opens for this integration type.

Figure 206: Add subscription window for Candidate profile providers integration type



7. Enter the **Subscription name**.
8. Select **ResumePal** as the **Provider**.
9. Enter the **Username** and **Password**.
10. Save the configuration:
    - Click **Save as inactive** if you do not yet want this subscription to be active.
    - Click **Save as active** if you want this subscription to be active.
11. Depending on how you saved the subscription (in the previous step), it is added to either the **Active** or **Inactive** page for **Subscription administration** for the Candidate profile providers integration type.

Figure 207: Subscription administration page with subscription added to it



Configure Talent Gateways for ResumePal

Once the client setting and subscription are created, you can configure the individual Gateways accept ResumePal.

Figure 208: Talent Gateway Admin menu

Figure 209: Talent Gateway administration page

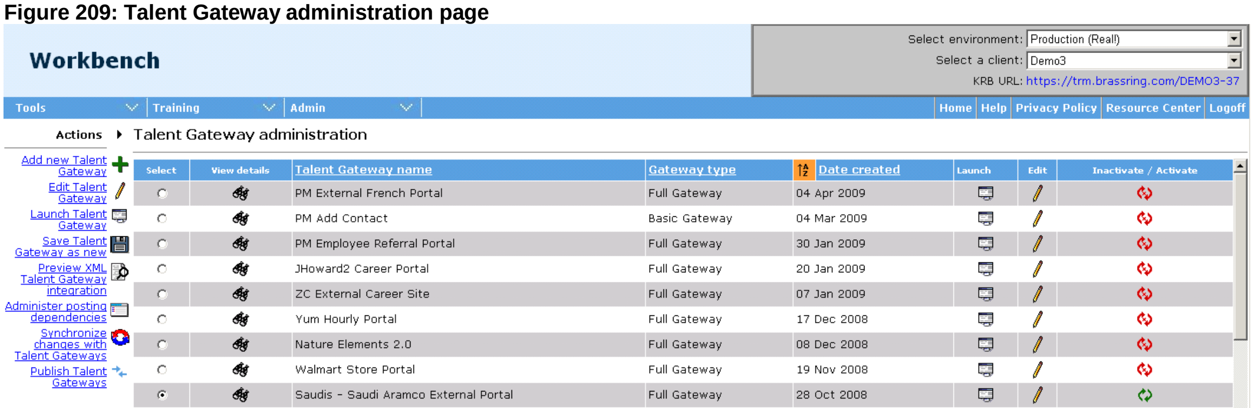
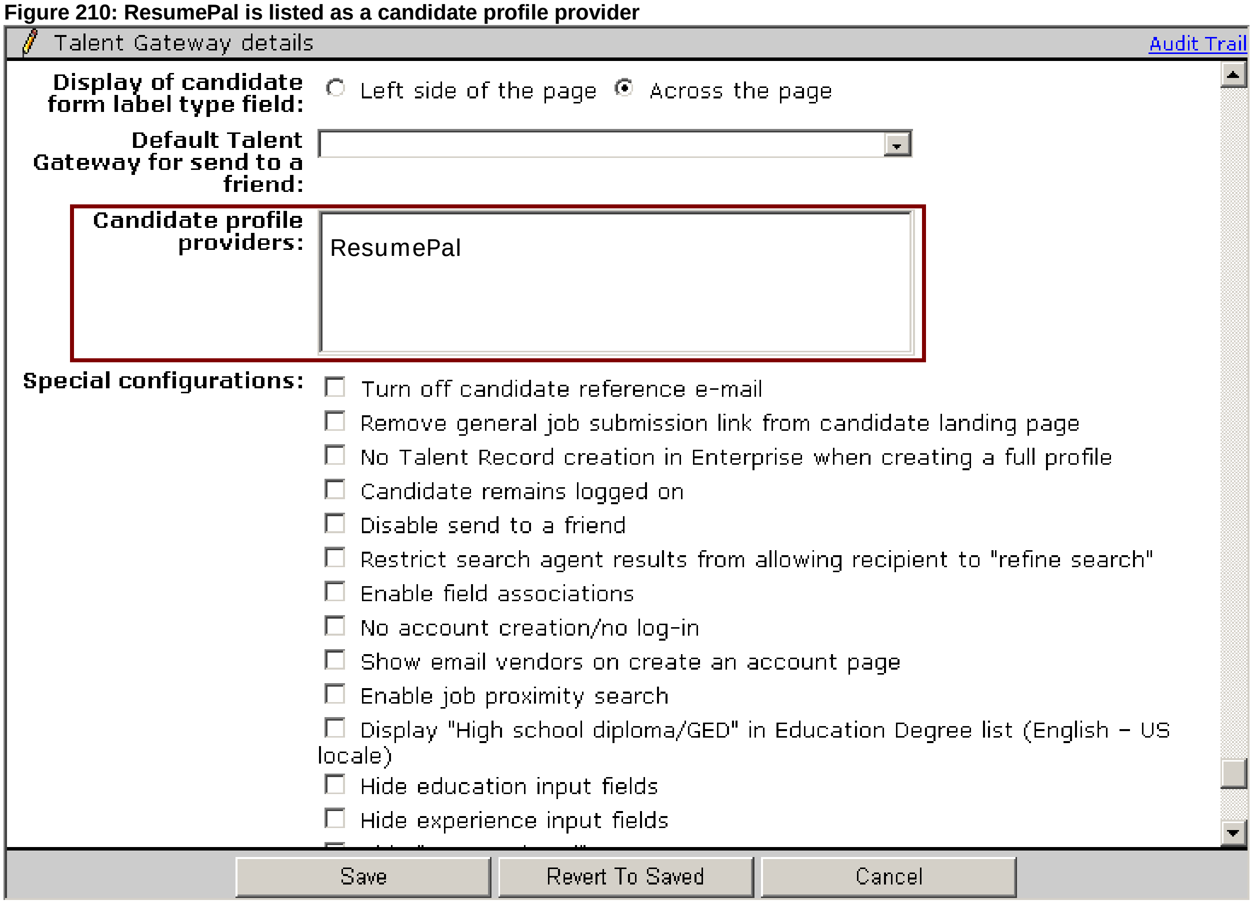


Figure 210: ResumePal is listed as a candidate profile provider



Customize Text for the Profile Source Page

The next step is to customize text for settings on the **Profile source page** using the Text customization interface.

Figure 211: Text customization

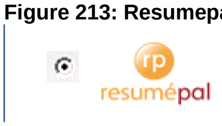
Figure 212: Profile source page

See the *User Experience* section for more information.

User Experience

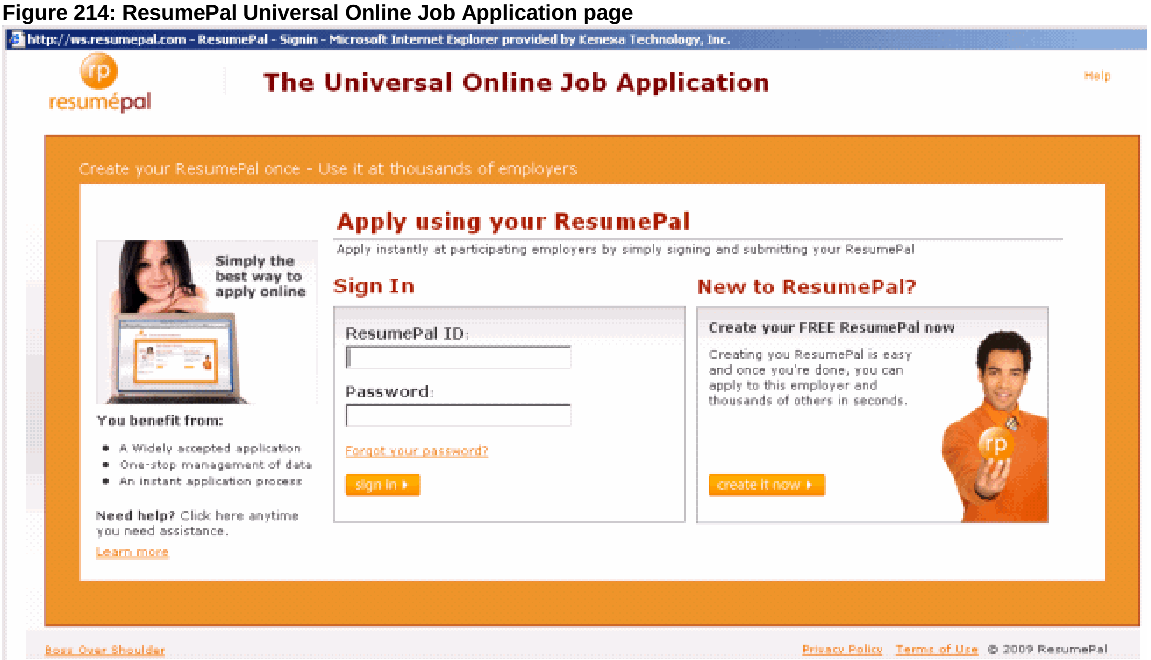
The **ResumePal** icon is displayed on the career site.

Figure 213: Resumepal button



The candidate clicks the **ResumePal** icon. The **Universal Online Job Application** page opens.

Figure 214: ResumePal Universal Online Job Application page



The candidate logs in (creating a new login if necessary). The candidate's personalized ResumePal profile page opens. From this page, the candidate can take many actions on his or her ResumePal profile.

Figure 215: ResumePal Profile page

Once the ResumePal profile is submitted, the information collected for the profile automatically populates the candidate's complete Talent Gateway profile.

Figure 216: Talent Gateway Resume/CV profile information