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Kenexa 2x BrassRing

R12.4

Product Update Guide

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About Kenexa

Kenexa is a leader in building the world's greatest workforces. Using the unique combination of software, science and business process optimization, Kenexa helps organizations hire and retain a more productive workforce. We take great pride in being the only company in the world to offer these combined services, which ultimately link human resource processes to business outcomes.

We believe that no matter who they are, or what part of the world they live in, people define themselves by the work they do. When people are in jobs they love, and are in environments that maximize their potential, they are not only more productive employees, they are better parents, friends, partners and neighbors. It's the core of our mission, our passion and our purpose—globally serving humanity, everyday.

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Kenexa 2x Mobile™ – Sequential Form Approval

Kenexa 2x Mobile now supports 2x BrassRing sequential form approvals for users with approval privileges.

Product	<ul style="list-style-type: none"> ▣ 2x BrassRing ▣ New UI ▣ Workbench Self-Service ▣ Talent Gateways 	<ul style="list-style-type: none"> ▣ Agency Manager ▣ Data Insight Tool ▣ SmartApproval ▣ 2x Mobile
Visible Changes	<ul style="list-style-type: none"> ▣ No – contact your CSC for implementation details. ▣ Yes – see the <i>Visible Changes</i> document sent out for each release build. 	
How do I get this feature?	<ul style="list-style-type: none"> ▣ Automatic – see details below. ▣ Specific conditions required – see details below. ▣ Configuration required – see details below. 	

Benefits

Approvers can conveniently handle approval requests from their mobile devices.

Feature Description

Approvers who open an eLinked approval request via their mobile device can now approve or decline the request. When opening the request:

1. User sees the configured mobile fields for the particular form and Approve and Decline options if the eLink is valid. The eLink sent for approval is sent in view mode regardless of the QuickStart user form privileges. All fields are non-editable except **Approve**, **Decline** and the optional **Reason for selection** (or customized text) field.



If the eLink is no longer valid (form was already approved/declined or was sent prior to an override approval occurring in 2xB), user sees this message: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.”

2. Once the approver selects **Approve** and clicks **Save**:

- If there are no other approval levels or all remaining approval levels are set to “Bypass,” then the form status changes to “Approved” and the eLink user receives the prompt: “Response has been sent”.

–OR–

If there is another approval level (that is not set to “Bypass”) the form routes to the next approver and the current approver receives the prompt:

eLink of the form: <formname> - <reqID> : <job title> has been sent to the following recipient:

<nextapprover>



- Notification is sent to individuals indicated on the form once it is approved (if “Send approval notifications” = “Yes”).

–OR–

The approver selects **Decline** and clicks **Save**:

- The form status changes to “Declined”
- If the form’s “Send decline notification” = “No,” the eLink user receives the prompt: “Response has been sent.”

–OR–

If the form’s “Send decline notification” = “Yes”, the approver receives the prompt

“Your decline of this form has been saved. An email will be sent to the prior approvers and form creator informing them of this action.”



- Notification is sent to any prior approvers and the form creator after it is declined (if "Send decline notification?"= "Yes").

How Do Clients Get this Feature?

This feature is available automatically without configuration for 2x Mobile users if your site is configured to use sequential form approval.

Agency Managers – Sorting Enhancements

The default sorting order displayed on the **Select agency access** page grid now sorts first on **Selected**, and then on **Agency name**.

Product	<ul style="list-style-type: none"> ↳ 2x BrassRing · New UI · Workbench Self-Service · Talent Gateways 	<ul style="list-style-type: none"> ↳ Agency Manager · Data Insight Tool · SmartApproval · Other
Visible Changes	<ul style="list-style-type: none"> · No – contact your CSC for implementation details. ↳ Yes – see the <i>Visible Changes</i> document sent out for each release build. 	
How do I get this feature?	<ul style="list-style-type: none"> ↳ Automatic – see details below. · Specific conditions required – see details below. · Configuration required – see details below. 	

Benefits

The new default sorting provides faster access to Agency Managers that users have selected in the past.

Feature Description

The default sorting order displayed on the **Select agency access** page grid has changed from sorting on **Agency name** alone to sorting first on **Selected**, and then on **Agency name**. Selected Agency Managers are listed first on the grid (in order by name), followed by Agency Managers that have not been selected.

Select all	Agency name	Preferred Fee	Specialization	Description	Country
<input checked="" type="checkbox"/>	092205		092205	092205	United States
<input checked="" type="checkbox"/>	MY AM		MY AM	MY AM	United States
<input type="checkbox"/>	AM US LS		Specialization_AM US LS	Description_AM US LS	United States

The **Select agency access** page is accessed from the **Edit posting options** page in 2xB. Scroll to the 'Agency Managers' section and click the pencil icon in the Select/edit agency access column for a specific Agency Manager.

Select all	Agency Manager	Re-post	Days until posted	Days to remain posted	Posted date	Removal date	Select/edit agency access	Edit site questions
<input type="checkbox"/>	Agency	Re-post	00	365				
<input type="checkbox"/>	AM copy of Priya's AM	Re-post	00	365				
<input type="checkbox"/>	AM US LS	Re-post	00	365				

On the 'Select agency access' page, users select the check boxes for the agencies to which the Req should be posted in the 'Select all' column on the far left.

Select all	Agency name	Preferred Fee	Specialization	Description	Country (main)	Location (main)	City (main)	Select agency contacts	Agency notes
<input type="checkbox"/>	092205		092205	092205	United States	Massachusetts		All	
<input checked="" type="checkbox"/>	AM US LS		Specialization_AM US LS	Description_AM US LS	United States	Massachusetts		Leslie Smith	
<input checked="" type="checkbox"/>	MY AM		MY AM	MY AM	United States	Massachusetts		All	

When selecting agencies for the first time on the 'Select agency access' page, Agency Managers are sorted by name only, since no Agencies are selected yet. Once you select and save your selections, the page updates

and the selected agencies () are displayed at the top of the page in the order of 'Agency name'. Agencies that have not been selected () are displayed below selected agencies, sorted by 'Agency name'.

'Select agency access' grid, selections saved and page redrawn with selected agencies at the top

<input checked="" type="checkbox"/>	092205	092205	092205	United States	Massachusetts	All		Expand
<input checked="" type="checkbox"/>	MY AM	MY AM	MY AM	United States	Massachusetts	All		Expand
<input type="checkbox"/>	AM US LS	Specialization_AM US LS	Description_AM US LS	United States	Massachusetts	All		Expand

Sorting on Column Headers

2xB users can still click column headers that are sortable, including Agency name, and the system will disregard the 'selection' column. To return to the default sort of selected Agency Managers sorting at the top of the grid after sorting on a particular column, sort, cancel out of the screen and reopen the page.

How Do Clients Get this Feature?

This feature is available automatically without configuration to clients with Agency Managers.

Attachments – Attachment Categories for Document Templates

Document templates can now be associated with an attachment category, including sensitive categories. When a Document template is associated with a sensitive attachment category, all documents generated from that template are handled as sensitive attachments (and are subject to the “sensitive attachments” user type privileges).

Product	<ul style="list-style-type: none">↳ 2x BrassRing•• New UI•• Workbench Self-Service•• Talent Gateways	<ul style="list-style-type: none">•• Agency Manager•• Data Insight Tool•• SmartApproval•• Other
Visible Changes	<ul style="list-style-type: none">•• No – contact your CSC for implementation details.↳ Yes – see the <i>Visible Changes</i> document sent out for each release build.	
How do I get this feature?	<ul style="list-style-type: none">↳ Automatic – see details below.•• Specific conditions required – see details below.•• Configuration required – see details below.	

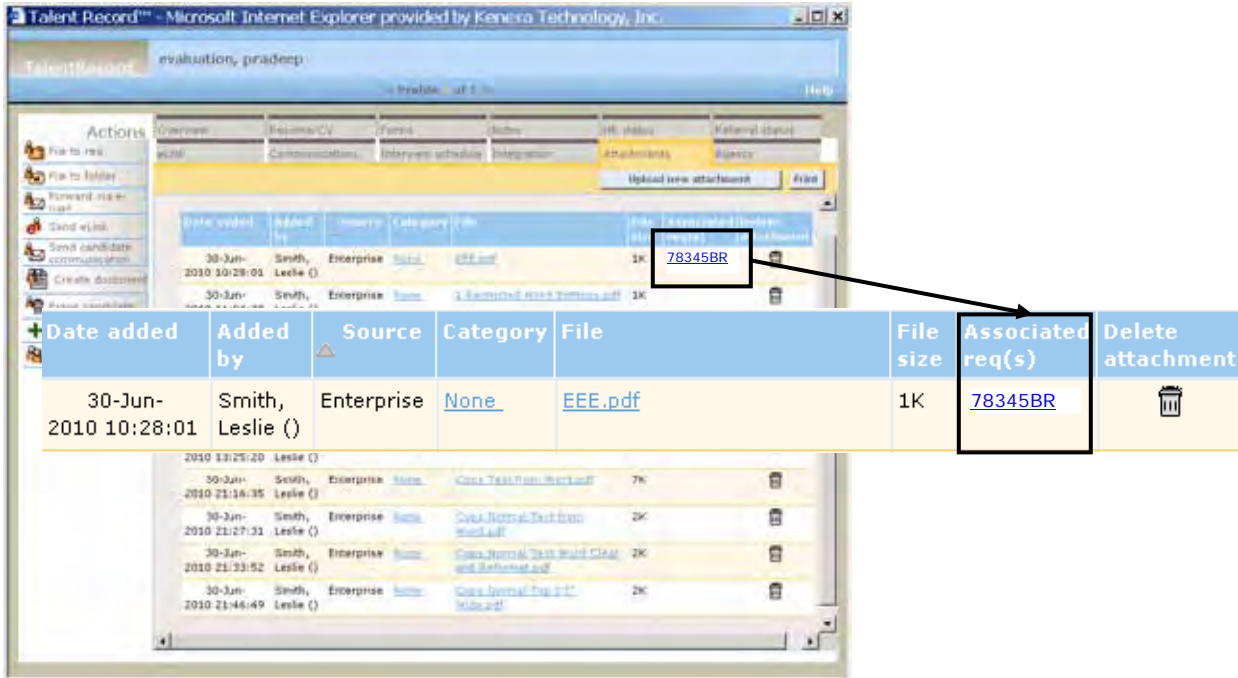
Benefits

Ensures that documents created from a “sensitive” document template will be handled with the appropriate user type access privileges.

Feature Description

2xB document template administrators can associate document templates with an attachment category, including sensitive categories. When a Document template is associated with an attachment category, all documents generated from that template are categorized as that type. Thus attachments generated from a template associated with a sensitive category are handled as sensitive attachments, and are subject to the “sensitive attachments” user type privileges. See *Attachments – Sensitive Attachment Privileges* for complete information on the privileges.

Documents are generated from document templates using the **Create document** action, which is available from within a req folder or from a Talent Record accessed from within a req folder. They are stored on the **Attachments** tab of the candidate’s Talent Record. This is existing functionality. When created from within a req folder, they are automatically associated to that requisition. This association is now displayed with the document on the Talent Record. All 2x BrassRing users who can view the Talent Record can see the “Associated req(s)” column displaying the auto-req ID when present. They can click the link and view the requisition regardless of their ownership relationship to that requisition.



How Do Clients Get this Feature?

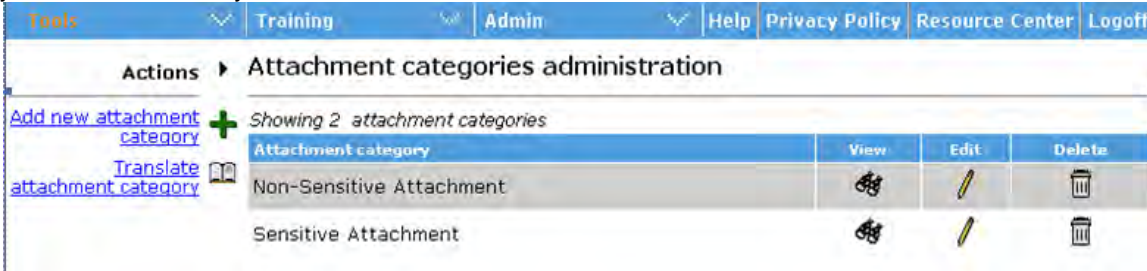
This feature is available automatically without configuration if your site is already using **Attachment categories**, configured in Workbench as 'sensitive' or not sensitive (the default). To use the feature:

- In Workbench Self-Service, configure attachment categories (configure one or more categories as sensitive if you want to use them).
- In 2xB Admin, select an attachment category for each template for which you want generated documents to be categorized.

Workbench Self-Service

Who does this: Certified Workbench User, Tier 1 and above

You configure **Attachment categories** for your attachments in Workbench, using existing functionality (**Tools > Settings > Attachment categories**). Designate the appropriate categories as "Sensitive attachment category" if you have not already done so.

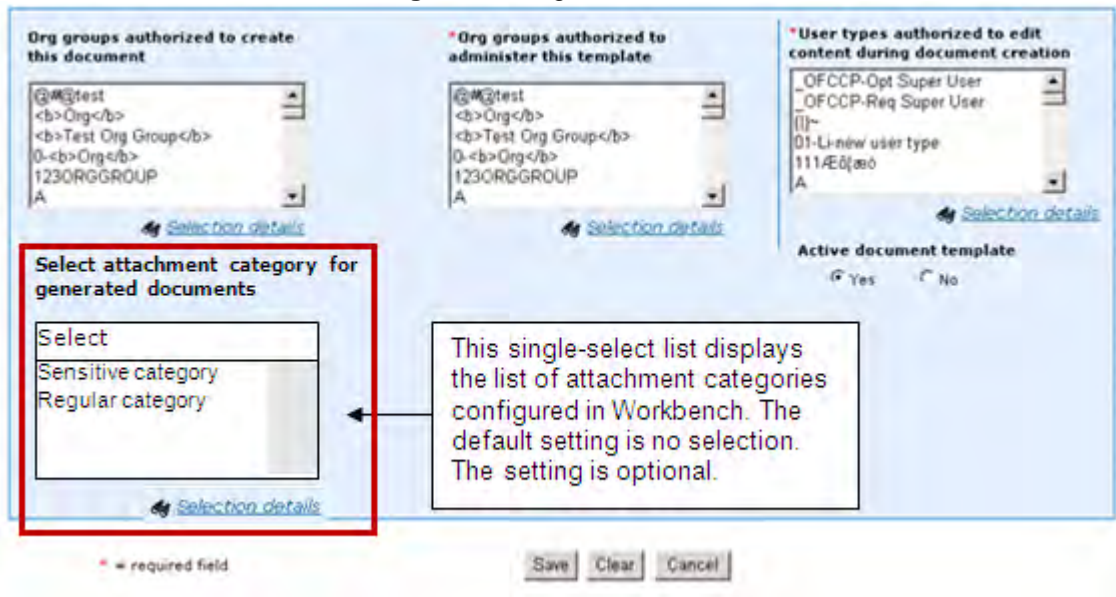


2x BrassRing Admin/Admin+

Who does this: 2x BrassRing Administrator

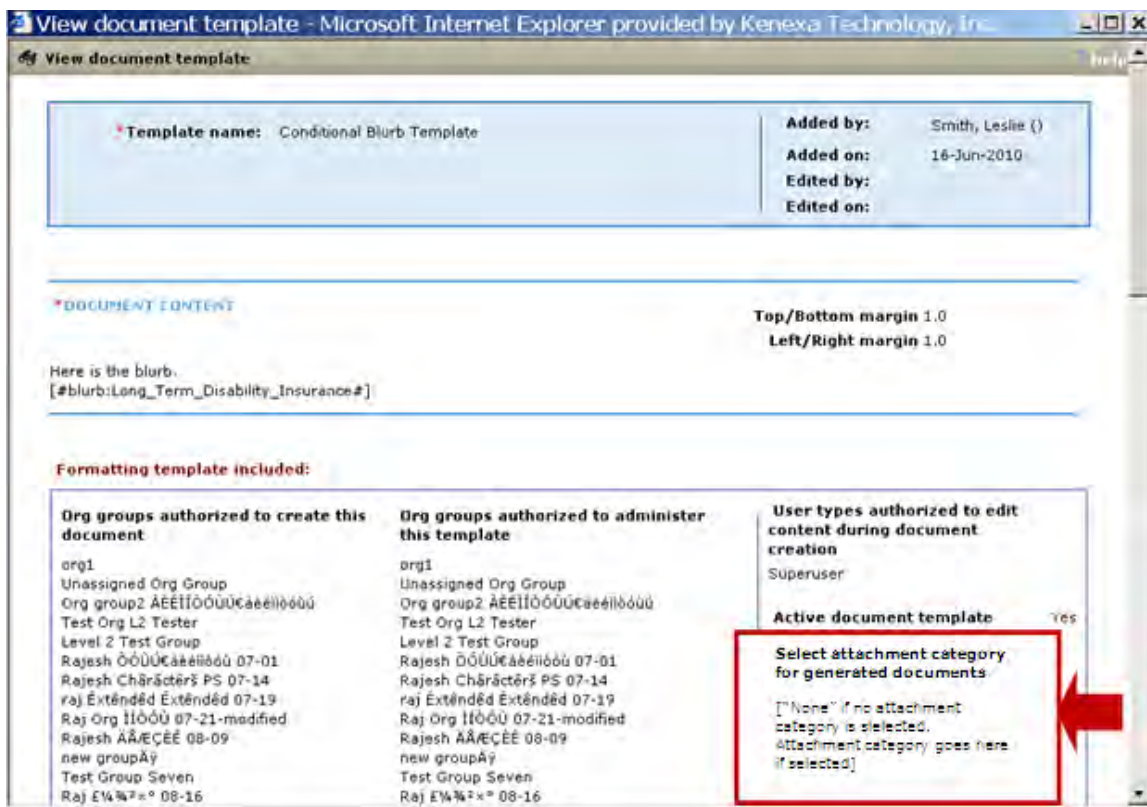
Template administrators can select an attachment category when creating a 2xB Document template:

1. In 2xB, select **Admin > Communications > Add document template**
 –OR–
Admin > Communications > Document templates > Edit [a specific] document template
2. Select one of the **Attachment categories** configured in Workbench.



3. Click **Save**.

On the View document template screen (**Admin > Communications > Document templates > View [a specific] document template**), users can also view the attachment category selected for a template.



Attachments – Sensitive Attachment Privileges

User type privileges related to sensitive candidate attachments now offer better control of access to the attachments:

- A new “master” privilege has been added: **Attachments – Sensitive attachments – all**.
- **Attachments – View sensitive attachments in my req** has become **Attachments – Sensitive attachments in my reqs only** and strictly limits access to sensitive candidate attachments associated only with the user’s own reqs.

Product	<ul style="list-style-type: none">▫ 2x BrassRing▫ New UI▫ Workbench Self-Service▫ Talent Gateways	<ul style="list-style-type: none">▫ Agency Manager▫ Data Insight Tool▫ SmartApproval▫ Other
Visible Changes	<ul style="list-style-type: none">▫ No – contact your CSC for implementation details.▫ Yes – see the <i>Visible Changes</i> document sent out for each release build.	
How do I get this feature?	<ul style="list-style-type: none">▫ Automatic – see details below.▫ Specific conditions required – see details below.▫ Configuration required – see details below.	

Benefits

Better control of access to sensitive candidate attachments.

Feature Description

User type privileges related to sensitive candidate attachments now offer better control of access to the attachments:

- A new “master” privilege has been added: **Attachments – Sensitive attachments – all**.
- **Attachments – View sensitive attachments in my req** has become **Attachments – Sensitive attachments in my reqs only** and strictly limits access to sensitive candidate attachments associated only with the user’s own reqs. (“My reqs” means the user has a relationship to the particular job requisition, either as creator, recruiter, hiring manager, or member of the req team; any action from a req with which the user does not have “my reqs” relationship or from outside of Reqs would be restricted for user with “my reqs” privilege.)

2xB users now require one of these privileges in order to upload sensitive attachments (previously the Sensitive category was available to any user when uploading attachments).

Attachments – Sensitive attachments – all

This privilege grants access to:

- view all sensitive attachments.
- upload sensitive attachments (regardless of whether the candidate is associated with a req).

Attachments uploaded from within a req folder will be associated with that requisition. Attachments uploaded to a candidate outside a req folder (from Candidate Search, working folders, etc.) are not associated with a req.

Attachments – Sensitive attachments in my reqs only

This privilege grants access to sensitive attachments associated with the user’s own reqs.

Users with this privilege **can view** sensitive attachments in this case only:

- sensitive attachment is associated with a req to which the user has a “my req” relationship.

They **cannot view** sensitive reqs in these cases:

- sensitive attachment is not associated with a req (Candidates in queue or Candidate search).
- sensitive attachment is associated with a req but the user does not have a “my req” relationship to that req (user is not the req’s creator, recruiter, manager, or member of the req team).

Users with this privilege **can upload sensitive** attachments (select from the **Sensitive** category when uploading):

- from within a req folder and has a “my req” relationship to that req. The uploaded attachment will be associated with that req.

They **can upload non-sensitive** attachments only (**Sensitive** category will not be available when uploading) in these cases:

- from within a req folder but does not have a “my req” relationship to that req.
- from outside a req folder.

Previously, user types with the old Attachments – View sensitive attachments in my req privilege enabled could perform the following actions (now users require new “Attachments – Sensitive attachments – all” privilege):

- view both sensitive and non-sensitive attachments uploaded through a Talent Gateway if they also had the **Attachments – View all attachments uploaded via Gateway**’ privilege. Now they can view only non-sensitive ones.
- view both sensitive and non-sensitive attachments uploaded through an Agency Manager if they also had the **Attachments – View all attachments uploaded via Agency Manager**’ privilege. Now they can view only non-sensitive ones.
- upload sensitive attachments from outside a req folder (e.g., from the Attachments tab in the Talent Record of a candidate who has no req association). Now the **Sensitive** category is hidden when the user is uploading an attachment when not in a req folder for which they have a “my req” relationship to that req.



To view or upload attachments, users must have other applicable candidate and attachment privileges, such as:

“Attachments – View all attachments uploaded via Agency Manager”

“Attachments – View all attachments uploaded via Gateway”

and these Candidate Actions privileges:

“Attachments - Add/View/Delete ‘My 2xB attachments’”

“Attachments - View "All attachments uploaded via 2xB”

Other Changes

The Req Id for req-associated candidate attachments created from Talent Gateways are currently displayed (in the attachments grid on the Attachments tab of the Talent Record) to indicate the association. This will now also be displayed for any attachments created/uploaded from within 2xB.

These attachment privileges apply to eLink functionality:

- user sending an eLink must have permission to view the attachment before it can be included in an eLink
- receiver of the eLink must have permission to view the attachment included in the eLink in order to view it.

Best Practice Recommendations

Enable the new “...– Sensitive attachments – all” privilege for at least one user type, such as Super User.

How Do Clients Get this Feature?

These user type privileges are available without configuration to those clients already using the Sensitive Attachments feature (contact your CSC for more information about enabling this feature).



Accounts currently using sensitive attachments should enable the new "...– Sensitive attachments – all" privilege for at least one user type, such as Super User. Otherwise any existing sensitive attachments not associated with a req will not be viewable by any user. (Attachments are not associated with a req when uploaded to a Candidate outside the Req Folder, either from Candidate Search, working folders, etc.).

Workbench Self-Service

Who does this: Certified Workbench User, Tier 1 and above

Assign the user type privileges in **Tools > Users > User Types**. They are located among the **Candidate Actions 2** privileges.

Edit Superuser step 2: Set Candidate Actions 2 privileges - Microsoft Internet Explorer provided by Kenexa Technology, Inc
Edit Superuser step 2: Set Candidate Actions 2 privileges
[Step 1: Set name and functions](#) Step 2: Set privileges

"Candidate Actions 2" privileges

Set privileges	
<input type="button" value="Select All"/>	
<input type="button" value="Clear All"/>	
<input checked="" type="checkbox"/>	Attachments - view "All attachments uploaded via Agency Manager"
<input checked="" type="checkbox"/>	Attachments - view "All attachments uploaded via Gateway"
<input checked="" type="checkbox"/>	Attachments - Sensitive attachments in my req only
<input checked="" type="checkbox"/>	Attachments - Sensitive attachments - all

Candidate & Req Forms – Field Name Length Increased

The character limit for field names on candidate and req forms has been increased from 255 to 4,000. Candidate forms and req questions will utilize this extended character limit.

Product	<ul style="list-style-type: none">⌘ 2x BrassRing⌘ New UI⌘ Workbench Self-Service⌘ Talent Gateways	<ul style="list-style-type: none">⌘ Agency Manager⌘ Data Insight Tool⌘ SmartApproval⌘ Other
Visible Changes	<ul style="list-style-type: none">⌘ No – contact your CSC for implementation details.⌘ Yes – see the <i>Visible Changes</i> document sent out for each release build.	
How do I get this feature?	<ul style="list-style-type: none">⌘ Automatic – see details below.⌘ Specific conditions required – see details below.⌘ Configuration required – see details below.	

Benefits

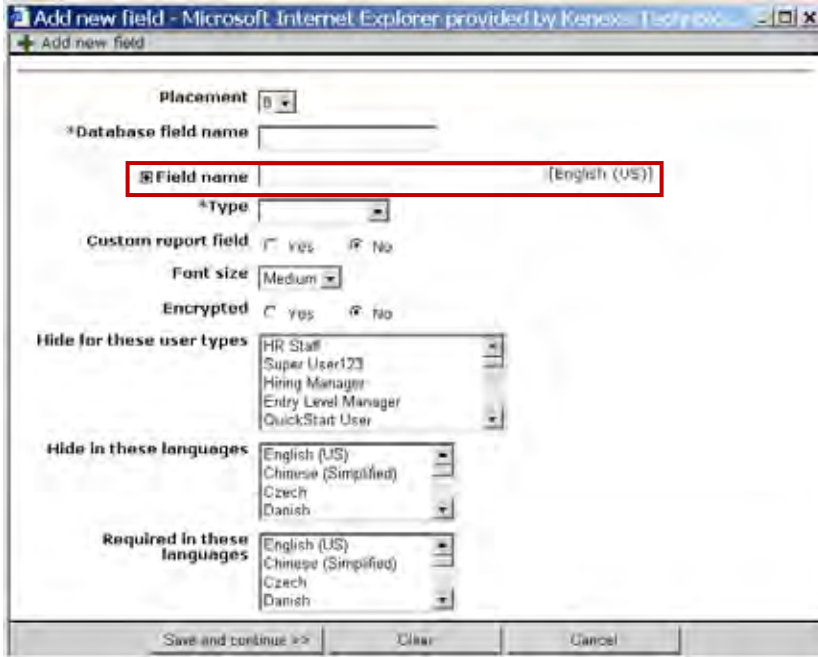
Clients can enter long question labels or sets of instructions as field names.

Feature Description

The character limit for **Field name** on 2x BrassRing forms has been increased from 255 to 4,000. The following candidate forms and req forms will utilize this extended character limit:

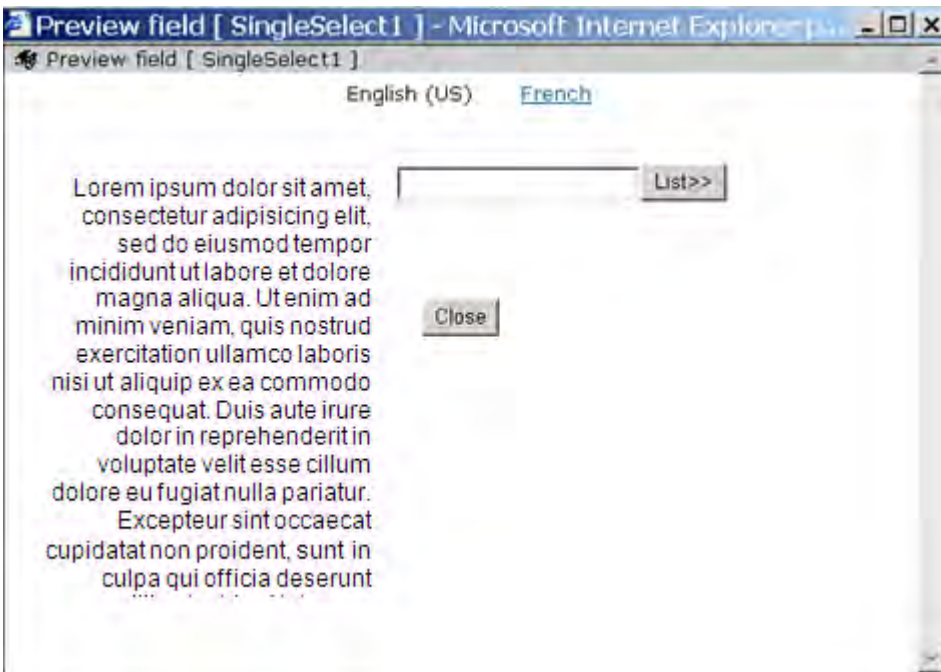
- Candidate Form Fields
- Custom Req Fields
- Req Subsidiary Form Fields
- Req Status Change Addendum Forms
- Document Subsidiary Forms
- Req Template Fields
- Form Fields Imports and Exports

When users add or edit a Candidate form field, they can enter a maximum of 4000 characters for the **Field name**. The **Field name** box will remain the same size as it was before this enhancement, but it will support up to 4000 characters. Examples below show adding a new field.



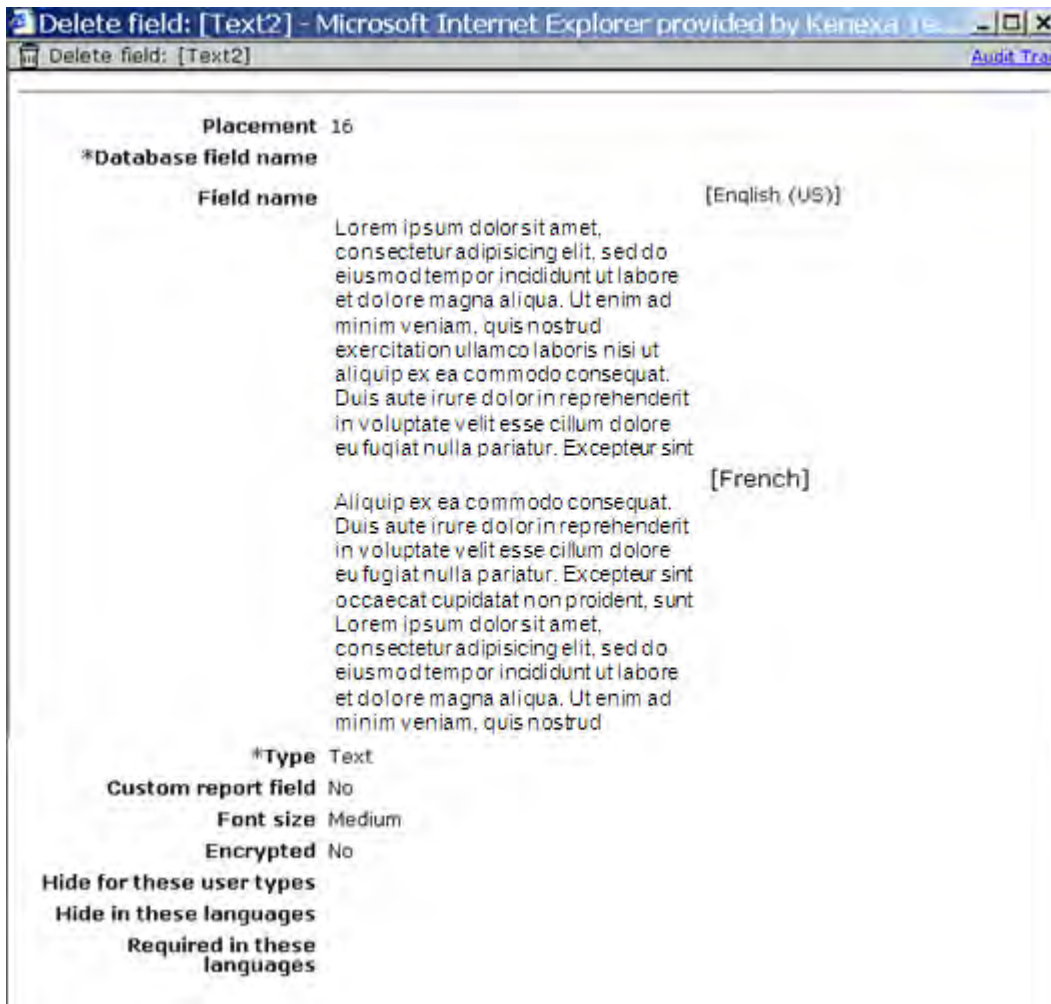
Previewing Fields

When a 2xB user clicks the **Preview field** icon, the **Preview field** window displays with the full name to the left of the box that will be populated once a value is entered or selected.



Deleting Fields

On the **Delete field** page for a field, the **Field name** field lists the value entered for “Field name” in every purchased language. This is existing functionality, but the page will be rendered differently once long fields are added.



Limitations and Known Issues

- Standard req fields are excluded.
- Only candidate forms and custom req fields will support the new character limit.
- Imports through workbench and XML integrations will support the new character limit.
- Candidate grid in KRB will limit visibility to a predefined number of characters.

How Do Clients Get this Feature?

This feature is available automatically without configuration. The longer field names are accepted and appear in 2xB once Certified Workbench users have added or edited form field names.

Workbench Self-Service

Who does this: Certified Workbench User, all tiers

In Workbench, you can add and edit field names using the following paths:

Candidate Form Fields

Tools > Forms > Candidate forms > Administer form fields > Add new field | Edit field attributes

Custom Req Fields

Tools > Forms > Reqs > Req forms > Define custom req fields > Define new req field | Edit field attributes

Custom Req Field Selected for Specific Req Templates

Tools > Forms > Reqs > Req forms > Administer req fields > Edit field attributes [of a specific field]

Req Subsidiary Form Fields

Tools > Forms > Req forms > Req subsidiary forms > Administer form fields > Add new field | Edit field attributes

Req Status Change Addendum Forms

Tools > Forms > Req forms > Req status change addendum form > Administer form fields > Add new field | Edit field attributes

Document Subsidiary Forms

Tools > Forms > Document subsidiary forms > Administer form fields > Add new field | Edit field attributes

Req Template Fields

Candidate Forms – Modify Access for Req Team

A new form attribute grants the right to edit forms to users who have a "my reqs" relationship with a per-req form (i.e., req's creator, hiring manager, or recruiter, as well as users on the req team).

Product	<ul style="list-style-type: none"> ↳ 2x BrassRing <ul style="list-style-type: none"> •• Agency Manager •• New UI ↳ Workbench Self-Service <ul style="list-style-type: none"> •• Data Insight Tool •• SmartApproval •• Talent Gateways •• Other
Visible Changes in 2xB	<ul style="list-style-type: none"> ↳ No – contact your CSC for implementation details. •• Yes – see the <i>Visible Changes</i> document sent out for each release build.
How do I get this feature?	<ul style="list-style-type: none"> ↳ Automatic – see details below. •• Specific conditions required – see details below. •• Configuration required – see details below.

Benefits

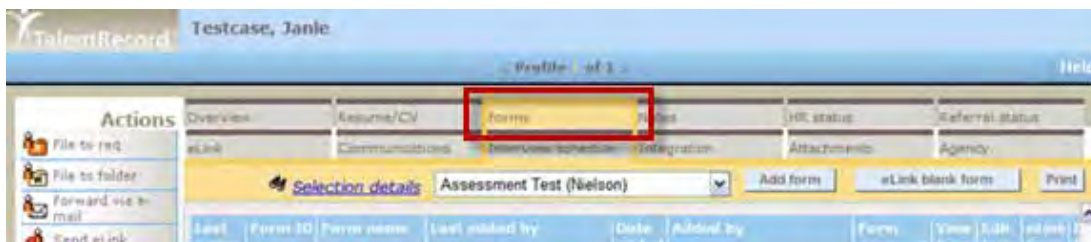
You can now grant a req team access to modify candidate forms associated with that requisition rather than having to grant users 'Modify all' access.

Feature Description

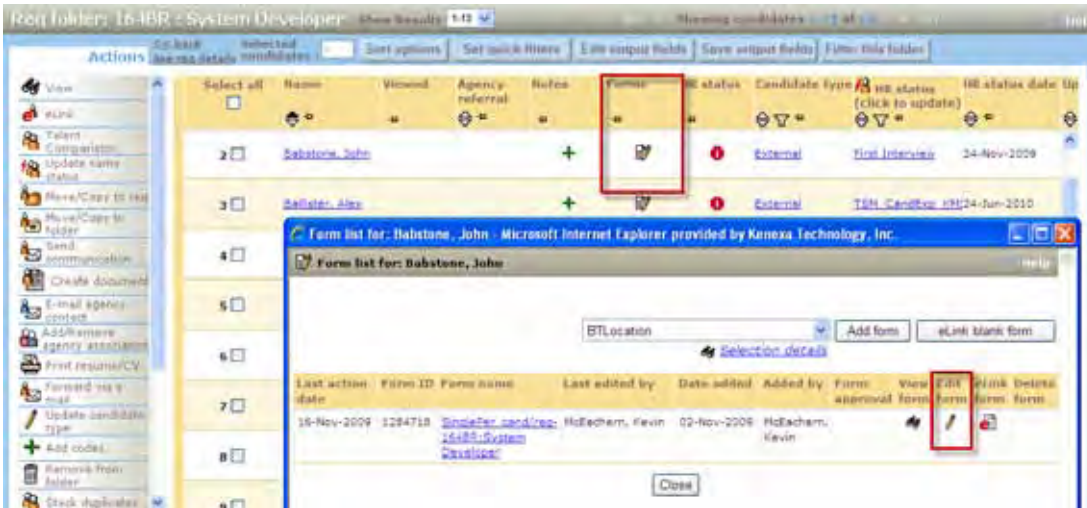
A new form attribute grants access to edit candidate forms to users who have a "my reqs" relationship with a per-req form. Users with "my reqs" relationship include the req's creator, hiring manager, or recruiter, as well as those on the req team. The attribute is applicable to single-per-candidate-per-req or multiple-per-candidate-per-req candidate forms.

2xB users with the new **Modify – my reqs** access and a "my reqs" relationship (or with existing **Modify all** access) can modify candidate forms from

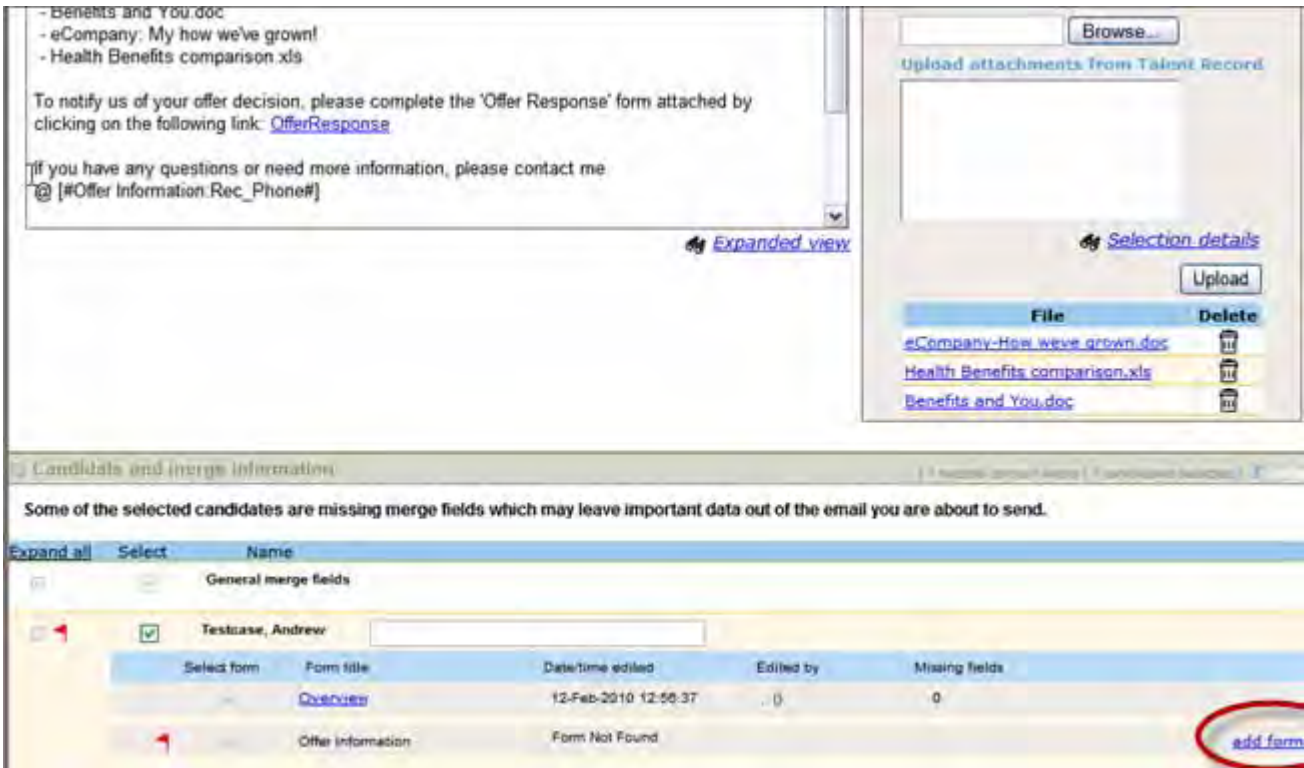
- Talent Record forms grid on the **Forms** tab



- Form pop-up screen accessed from a Form list (click the View/edit icon in the **Forms** column on a Candidates grid, then click the Edit form icon on the Form list).



- Communications sent via Generate letter, Send email communications, Create document/blurb – click the link to edit a form that is part of the communication.



The following figure illustrates in green which forms you can edit in the scenario where you have:

- “My req” relationship with requisition 9BR, but NOT with 21BR
- **Modify all** access to “Interview Evaluation” and “Phone screen” forms
- **Modify – my reqs** access to “Offer response” form.

Last action date	Form ID	Form name	Last edited by	Date added	Added by	Form approval	View form	Edit form	eLink form
03-May-2010	2221443	Talent Gateway-External	Submission, System ()	03-May-2010	Submission, System ()				
26-Jan-2010	2220076	Offer Response-21BR:Business Analyst	Kubicki, Janet (518-4618)	26-Jan-2010	Kubicki, Janet (518-4618)				
17-Dec-2009	2218549	Interview Evaluation-21BR:Business Analyst	Kubicki, Janet (518-4618)	17-Dec-2009	Kubicki, Janet (518-4618)				
17-Dec-2009	2218548	Phone Screen-21BR:Business Analyst	Kubicki, Janet (518-4618)	17-Dec-2009	Kubicki, Janet (518-4618)				
18-Nov-2009	2217500	Experienced Interview Summary-9BR:HRIS Analyst	Kubicki, Janet (518-4618)	18-Nov-2009	Kubicki, Janet (518-4618)	Pending			
18-Aug-2009	2197471	Phone Screen-21BR:Business Analyst	Kubicki, Janet (518-4618)	18-Aug-2009	Kubicki, Janet (518-4618)				
13-	2197417	Offer	ianetkubicki@yahoo.com	13-	ianetkubicki@yahoo.com				

9BR is "my req"

"Modify - my reqs" for form, no relationship

"Modify all" for form

"Modify all" for form

"Modify - my reqs" for form

"Modify all" for form

How Do Clients Get this Feature?

This feature is controlled by a new form attribute. Workbench self-service users set the new **Modify – my reqs** attribute when editing a form’s attributes.

Workbench Self-Service

Who does this: Certified Workbench User, Tier 0 and above

To set the attribute:

1. In Workbench, select **Tools > Forms > Candidate forms > Edit form attributes** for the form to be edited.
2. In the **Modify – my reqs** list, select the user types to be given modify access when they have a “my reqs” relationship.

The **Modify – my reqs** attribute field is active and editable only when the **Form multiples = Single per candidate/req combination** or **Multiple per candidate/req combination**.



Non-system users effectively have "Quickstart" user type access. However, they would never have a “my reqs” relationship. Therefore, they will not be able to receive and edit an elinked form unless the Quickstart user type has "Modify all" access.

Edit form attributes

Cascade approver messages

***Form multiples**

- One per candidate
- Multiple per candidate
- Single per candidate/req combination
- Multiple per candidate/req combination

Send existing form in edit mode: Yes No

Gateway candidate integration form? Yes No

Create form from TG

- IGNORE all "Required for form creation from TG" field settings
- When EVERY "Required for form creation from TG" field contains data
- When ANY "Required for form creation from TG" field contains data

Erase with candidates: Yes No

Form field alignment: Default Left

Add / View / Modify My

- HR Staff
- Hiring Manager
- QuickStart User
- Basic User
- New UI

View all

- HR Executive
- Super User
- HR Staff
- Hiring Manager
- QuickStart User

Modify - my reqs

- HR Executive
- Super User
- HR Staff
- Hiring Manager
- QuickStart User

Modify all

- HR Executive
- Super User
- HR Staff
- Hiring Manager
- QuickStart User

Delete all

- HR Executive
- Super User
- HR Staff
- Hiring Manager
- QuickStart User

Save Revert to saved Cancel

**Active for
single/cand/req or
multiple/cand/req**

Candidate Forms – Validating Data Format

This feature allows format validation to be configured and applied to data entered in a form's text fields.

Product	<ul style="list-style-type: none">⌘ 2x BrassRing⋄ New UI⌘ Workbench Self-Service⌘ Talent Gateways	<ul style="list-style-type: none">⌘ Agency Manager⋄ Data Insight Tool⋄ SmartApproval⋄ Other
Visible Changes	<ul style="list-style-type: none">⌘ No – contact your CSC for implementation details.⋄ Yes – see the <i>Visible Changes</i> document sent out for each release build.	
How do I get this feature?	<ul style="list-style-type: none">⋄ Automatic – see details below.⋄ Specific conditions required – see details below.⌘ Configuration required – see details below.	

Benefits

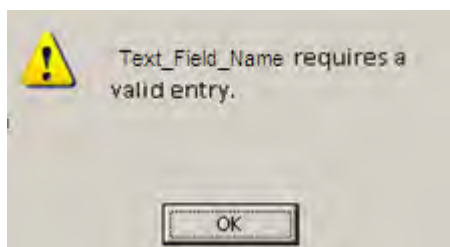
Clients can collect data for a field in a consistent format.

Feature Description

Format validation can now be configured and applied to data entered in a form's text fields. For example, you can validate the format of phone, national insurance information, or postal code data entered by candidates. Validation can be performed for data entered in form fields via:

- 2x BrassRing - eLink Candidate – when a system or non-system user receives an eLink with forms to complete.
- Talent Gateway – when a candidate edits questions on their profile (Edit profile > Questions tab)
- Full and global Talent Gateways – when a candidate applies (non-Gateway questionnaire apply) with or without selected jobs, and candidate form fields are configured on the “Questions” (Site questions) and “Additional information” tabs. This also applies for Basic Talent Gateways when auto-launch TG is configured.
- Gateway questionnaires – when a candidate applies with or without selected jobs, and candidate form fields are configured on the any sections preceding the Submit button page. This also applies for Basic Talent Gateways when auto-launch TG is configured.
- Agency Gateways - when configured for Agency Manager, candidate form field(s) can appear.
- Employee Referral Talent Gateways – candidate form field(s) can appear for referred candidate eLink, “Questions” and “Additional Information” pages directly, or following job selection/apply (GQ or non-GQ), depending on TG configuration.

When candidates or users enter data that fails validation (on a field configured with input validation), they will see the following message:



Field format validation can also be set up for Document Subsidiary forms, Req Subsidiary forms, and Req Status Change Addendum forms.

Once configured, validation is disabled or re-enabled in Workbench, using a new field attribute called **Input validation**.

Limitations and Known Issues

Data format validations occurs only for text and auto-fill (from unencrypted text field) field types.

All historical data remains unchanged and may or may not conform to newly-set input validation requirements. However, input validation is applied when an existing form entry is edited for a field that has changed to require validation.

How Do Clients Get this Feature?

Please contact your CSC for more information about enabling this feature. Once configured, input validation can be disabled or re-enabled for form fields by setting a new form field attribute, **Input validation**.

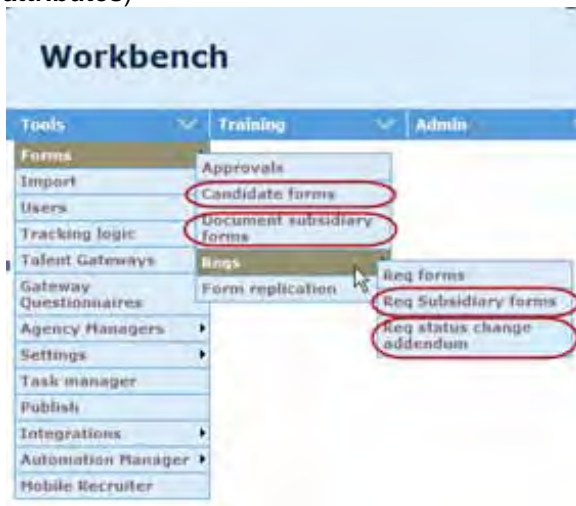
Workbench Self-Service

Who does this: Certified Workbench User, all tiers

Certified Workbench users can edit the new **Input validation** field attribute that controls format validation of data entered for a text field. Forms types whose fields include this attribute are: Candidate forms, Document subsidiary forms, Req Subsidiary forms, and Req status change forms.

To disable or re-enable validation for a field (where custom validation has been configured by Kenexa staff):

1. In Workbench, navigate to the field's Define field attributes page (**Tools > Forms > [form type, such as Candidate forms] > Administer form fields > Add new field or Edit field attributes > Define field attributes**)



2. When the validation requirements have been configured by Kenexa staff, you see **custom** selected as the value for **Input validation**, as well as an example of the required input. If you switch from **custom** to **none** and click **Save**, a message confirms that, "Input validation will no longer be applied."

Add new field

Placement: 22

***Database field name**: inputval

Field name: inputval

Field length: 5

***Type**: Text

Input validation: none

Example:

Custom report field: Yes No

Font size: Medium

Required for form creation from TG: Yes No

Encrypted: Yes No

Publish for use as autofill?: Yes No

Hide for these user types: Super User, HR Staff, QuickStart Use, DR/R/Dept Supp, Admin Plus

Hide in these languages: English (US), English US Gov, Spanish

Required in these languages: English (US), English US Gov, Spanish

Search / Output

Searchable?: Yes No

Outputable?: Yes No

Used (TEXT)	Available (TEXT)	Enable Search & Output
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save and continue >>

Save Clear Cancel

Candidate Imports – Keeping Latest Resume

Candidate imports performed to update candidate data often don't include any changes to the resume, although the resume is included with the import data. This feature provides the option to replace an existing resume rather than add a new one in such cases.

Product	<ul style="list-style-type: none">┆ 2x BrassRing┆ New UI┆ Workbench Self-Service┆ Talent Gateways	<ul style="list-style-type: none">┆ Agency Manager┆ Data Insight Tool┆ SmartApproval┆ Other
Visible Changes	<ul style="list-style-type: none">┆ No – contact your CSC for implementation details.┆ Yes – see the <i>Visible Changes</i> document sent out for each release build.	
How do I get this feature?	<ul style="list-style-type: none">┆ Automatic – see details below.┆ Specific conditions required – see details below.┆ Configuration required – see details below.	

Benefits

This feature reduces needless data storage costs.

Feature Description

For candidate imports that update candidate data and include an unchanged resume/CV, the existing resume can now be replaced instead of having a new one added. All resumes that have a req association will be maintained – when a user views the resume from within a Req folder, they will continue to see whatever resume was submitted at the time of application. Only the current resume that is associated with the candidate's Talent Record outside of reqs (i.e., **not** associated with a job apply), will be replaced.

Limitations and Known Issues

When an existing resume is replaced, any resume edits done manually via 2xB are lost.

How Do Clients Get this Feature?

This feature is controlled automatically via a flag set in the import XML of the application performing the import.

- Skills and responsibilities will be lost with the override
- Any resume edits done via 2xB will be lost with the override

Candidate Portal – Document Packets

Document packets are a new communications tool for posting a combination of external files and Talent Record attachments to the Candidate Portal.

Product	<ul style="list-style-type: none">⌘ 2x BrassRing⋄ New UI⌘ Workbench Self-Service⋄ Talent Gateways	<ul style="list-style-type: none">⋄ Agency Manager⋄ Data Insight Tool⋄ SmartApproval⌘ Candidate Portal
Visible Changes	<ul style="list-style-type: none">⌘ No – contact your CSC for implementation details.⋄ Yes – see the <i>Visible Changes</i> document sent out for each release build.	
How do I get this feature?	<ul style="list-style-type: none">⋄ Automatic – see details below.⋄ Specific conditions required – see details below.⌘ Configuration required – see details below.	

Feature Description

The Candidate Portal, introduced last release, allows 2x BrassRing users to post a document created with a document template, such as an offer, out to the portal and then send the candidate an email. The designated candidate receives the email (with an eLink to the secure Candidate Portal), from which he or she can access the document by logging into the portal with the same username and password used to apply to the position.

With this release, you can post packets of documents, which can include additional external files as well as attachments that are located in the Talent Record. For example, you can provide candidates with all the documents related to a job offer in a secure manner.

How Do Clients Get this Feature?

The document packet feature for the Candidate Portal is controlled by new user type privileges and requires the setup of document packet templates in the 2xB Admin module. Contact your Kenexa consultant or a certified Workbench user for more information on privileges. You should also contact your Kenexa consultant for help setting up the Candidate Portal feature if your site is not already using it (Candidate Portal setup is summarized here).

Major Tasks for Configuring Candidate Portal and Using Document Packets

Your Kenexa consultant turns on the client setting for the Candidate Portal. Certified Workbench users or your Kenexa consultant can then perform steps 1 through 5 to prepare the portal for use (steps shown are for candidate job offers). Details for each step follow this summary.

1. **New for Document Packets!** Enable the new **Communications** user type privileges for the appropriate user types in your organization:
 - Document packet templates – add
 - Document packet templates – administer
 - Document packet templates – delete
 - Document packet – send
 - Document packet – viewIf you have not already done so, also enable the **Candidate Actions 2** user type privilege, **Attachments – post to candidate portal** for the appropriate user types in your organization.
2. For offers, create the Document subsidiary form to be used as the Offer/Response form. In this step, you configure form attributes.
3. Configure form field attributes for the OfferResponse form.

4. Configure the Talent Gateway that will be the Candidate Portal.
5. Customize text for the Candidate Portal using the Text Customization tool:
 - Landing logged in tab
 - Candidate Portal tab

Note: Your 2x BrassRing Administrator for the Communications Module or your Kenexa consultant performs the following template preparation tasks.

6. Create Offer document template in 2xB. (Kenexa or 2xB Administrator)
7. Configure the Offer e-mail template in 2xB. (Kenexa or 2xB Administrator)
8. **New for Document Packets!** Create document packet template in 2xB. (Kenexa or 2xB Administrator)

Workbench Self-Service

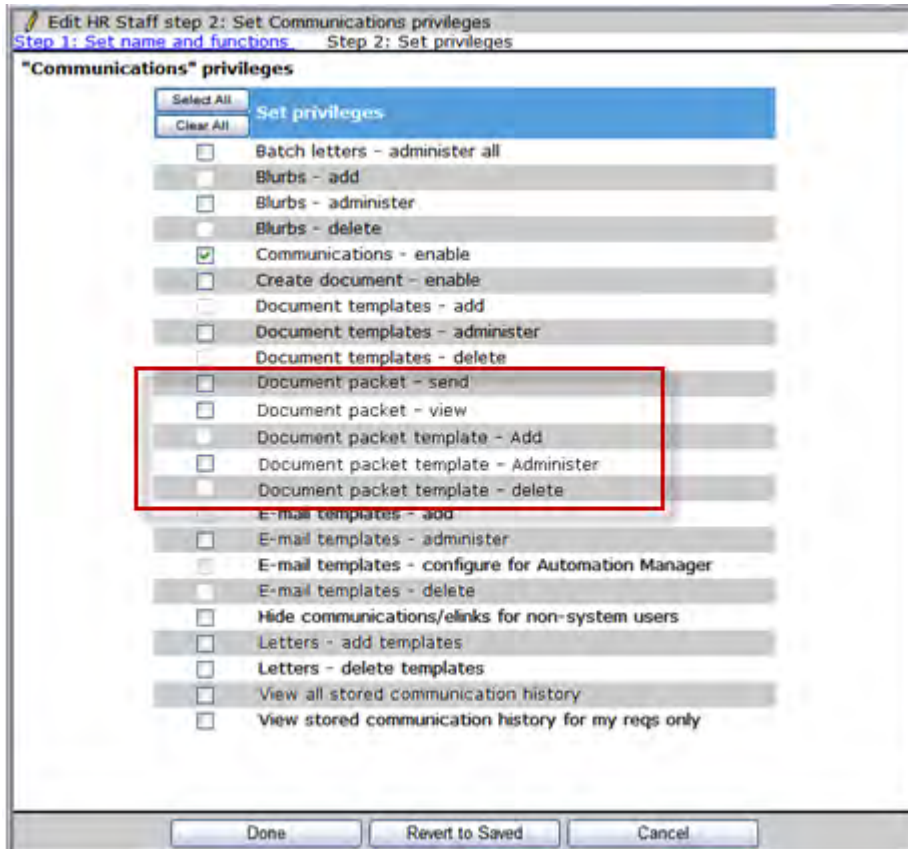
Who does this: Certified Workbench User, Tier 2 and above

1. Enable User Type Privileges

Enable the **Candidate Actions 2** user type privilege, **Attachments – post to candidate portal** if not already done.

Also enable the new **Communications** user type privileges for the appropriate user types in your organization.

- **Document packet – Send**
when enabled, **Document packet** is available in the **Send communications** screen in 2xB for users of this user type (Candidate Portal must be set up)
- **Document packet – View**
when enabled, users of this user type can click the link in Communications history to view the contents of a document packet that was sent (Candidate Portal must be set up)
- **Document packet template – Add**
when enabled, the **Admin > Communications > Add document packet template** menu item appears for 2xB users of this user type (if **Document packet templates – administer** is also enabled)
- **Document packet template – Administer**
when enabled, the **Admin > Communications > Document packet template** menu item appears for 2xB users of this user type (Candidate Portal must be set up)
- **Document packet template – Delete**
when enabled, the delete trash is available in the **Admin > Communications > Document packet templates** screen in 2xB for users of this user type (if **Document packet templates – administer** is also enabled)

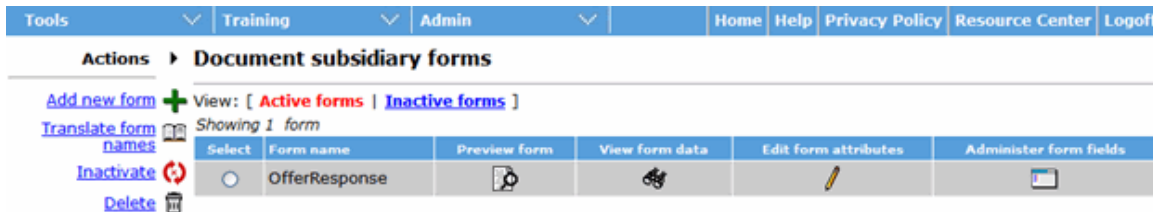


If just setting up the Candidate Portal, you also enable the **Candidate Actions 2** user type privilege, **Attachments – post to candidate portal** for the appropriate user types in your organization.

2. Create the Document Subsidiary Form

Configure the **Document subsidiary form** in Workbench (for example, an Offer Response form). **Note:** You can create several Document subsidiary forms to accommodate your organization's needs.

1. Select **Tools > Forms > Document subsidiary forms**. The **Document subsidiary forms** page displays.



2. Click **Add new form** in the **Actions** menu. The **Edit form attributes** window displays.

3. Configure the form attributes. Document subsidiary form attributes are similar to candidate form attributes with the following exceptions:
 - Notify users upon form creation: Select the e-mail addresses and/or users who should be notified when the candidate clicks the **Save** button on the Candidate Portal.
 - Customers can select or add e-mail addresses for individuals and individuals in roles (**Manager, Recruiter, Req team**) to be notified when the candidate clicks **Save** on the Candidate Portal.
 - There is no “Add/view/modify my” form privilege for this type of form (because all forms would be created by the candidate)
 - **View all, Modify all, and Delete all** work similar to Candidate forms.

3. Configure Form Field Attributes for the Doc Subsidiary Form

The next step is to configure form fields for the OfferResponse Document subsidiary form.

Doc subsidiary forms have an auto-fill source: Unique ID. This unique identifier for the form ties the Offer response to the Offer document (PDF).

Path: **Tools > Forms > Document subsidiary forms > Edit fields > Add new field > Autofill > Save and continue > DOCUMENT: uniqueID**

Actions ▾ Administer form fields: [OfferResponse]

View: [Active fields | Inactive fields]

Showing 10 fields

Select	Order	Database field name	Display name	Preview field	Field type	Searchable	Outputable	Verify enabled	Encrypt	Start type	Custom report field	Edit field attributes	Administer field options
<input type="radio"/>	1	Title	Acceptance/Decline of Offer		label	No	No	No	No	N/A	No		
<input type="radio"/>	2	DocumentID	DocumentID		auto-fill	No	No	No	No	N/A	No		
<input type="radio"/>	3	CandidateName	Candidate First Name		auto-fill	No	No	No	No	N/A	No		
<input type="radio"/>	4	CandidateName	Candidate Last Name		auto-fill	No	No	No	No	N/A	No		
<input type="radio"/>	5	ReqID	Requisition ID		auto-fill	No	No	No	No	N/A	No		
<input type="radio"/>	6	JobTitle	Job Title		auto-fill	No	No	No	No	N/A	No		
<input type="radio"/>	7	Location	Location		auto-fill	No	No	No	No	N/A	No		
<input type="radio"/>	8	OfferResponse	Offer Response		radio	No	No	No	No	Alpha	No		
<input type="radio"/>	9	DeclineReason	DeclineReason		single-select	No	No	No	No	Alpha	No		
<input type="radio"/>	10	*Authorization	By checking this box, I acknowledge that I have read ...		checkbox	No	No	No	No	Alpha	No		

Click **Administer form fields** for the Document sub form you just created. Configure the DocumentID field using the settings below.

Edit field attributes: [DocumentID] - Microsoft Internet Explorer provided by Kenexa Technology...

Edit field attributes: [DocumentID] [Audit Trail](#)

Placement

*Database field name

Field name [English (US)]

*Type

Custom report field Yes No

Font size

Encrypted Yes No

Hide for these user types

Hide in these languages

Required in these languages

Save and continue >> Revert to saved Cancel

Define field attributes - Microsoft Internet Explorer provide

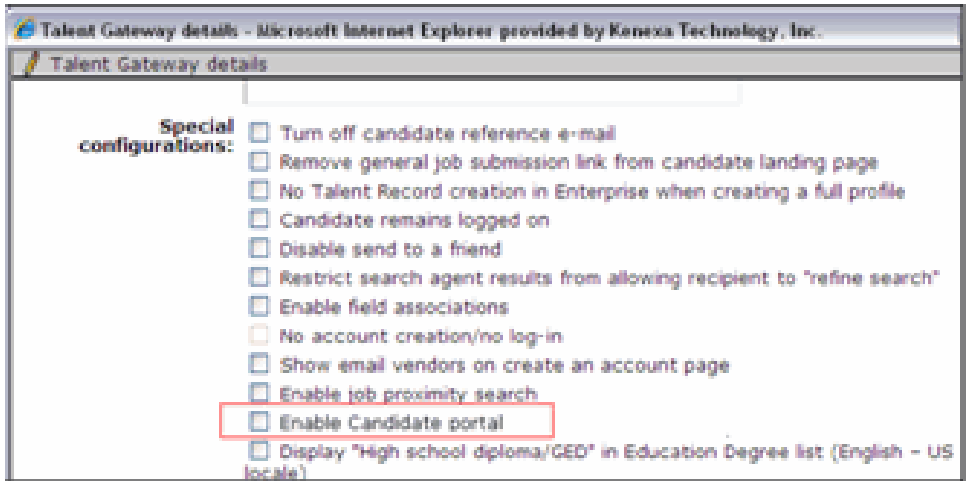
Define field attributes

Field name

Autofill from

4. Configure the Candidate Portal

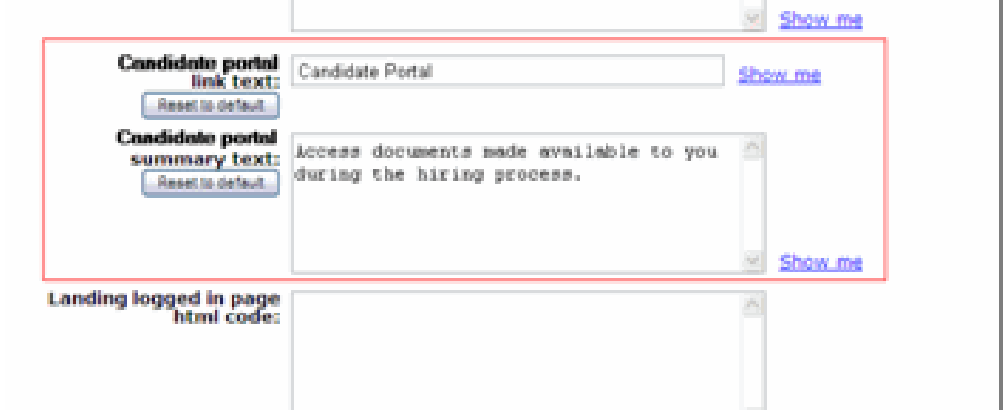
Configure an existing or new Talent Gateway to be the Candidate Portal. Navigate to the **Special configurations** section on the **Talent Gateway details** page and check the box for **Enable Candidate portal**.



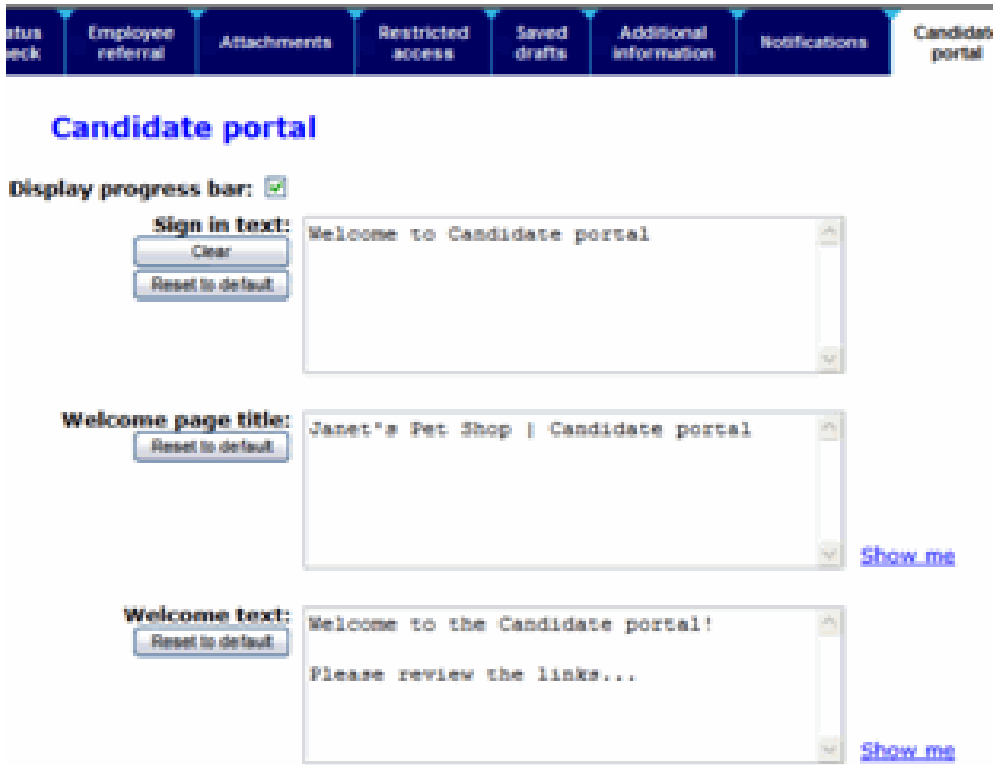
5. Customize Candidate Portal UI Text

Customize text in the following locations in the text customization interface: **Landing logged in** tab and **Candidate Portal** tab.

On the **Landing logged in** tab, configure the following settings for UI text messages on the Candidate Portal: **Candidate portal link text** and **Candidate portal summary text**.



On the **Candidate Portal** tab, configure UI text messages for the following settings: **Display progress bar**, **Sign-in text**, **Welcome page title**, and **Welcome text**.



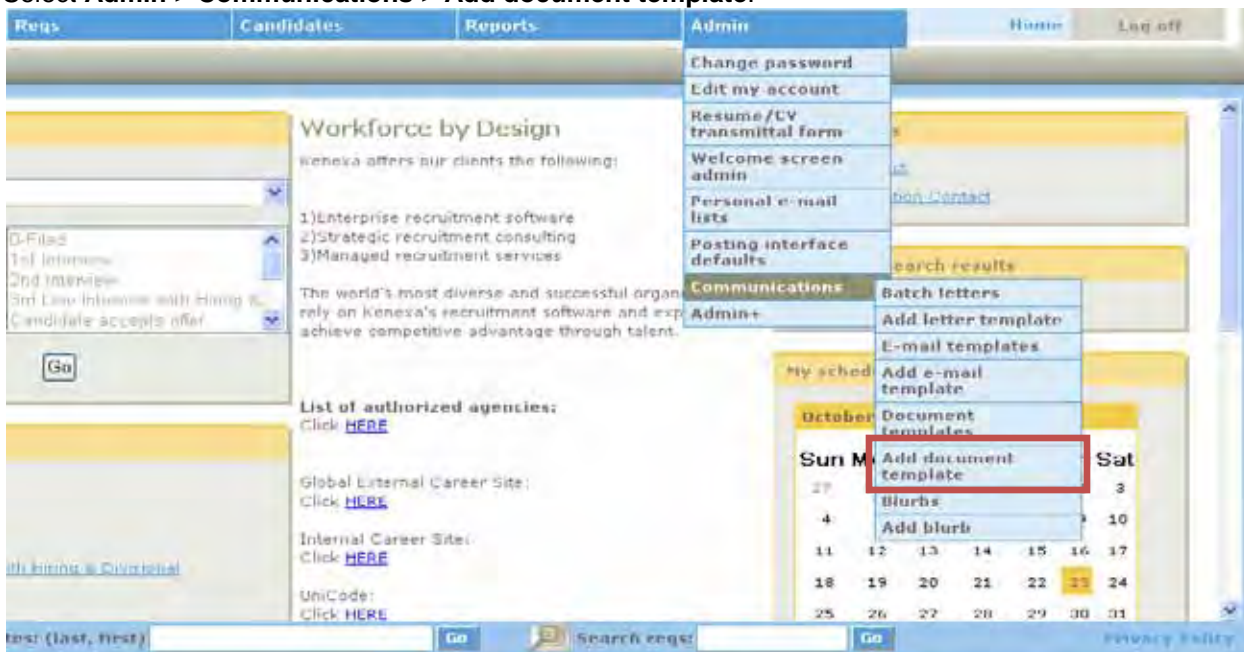
2x BrassRing Admin/Admin+

Who does this: 2x BrassRing Administrator performs steps 6 through 8.

6. Create Offer Document Template

In 2x BrassRing Communications Module, create Document template(s) to be used for the Offer Document(s).

Select **Admin > Communications > Add document template**.



Configure the document template to allow posting to the Candidate Portal.

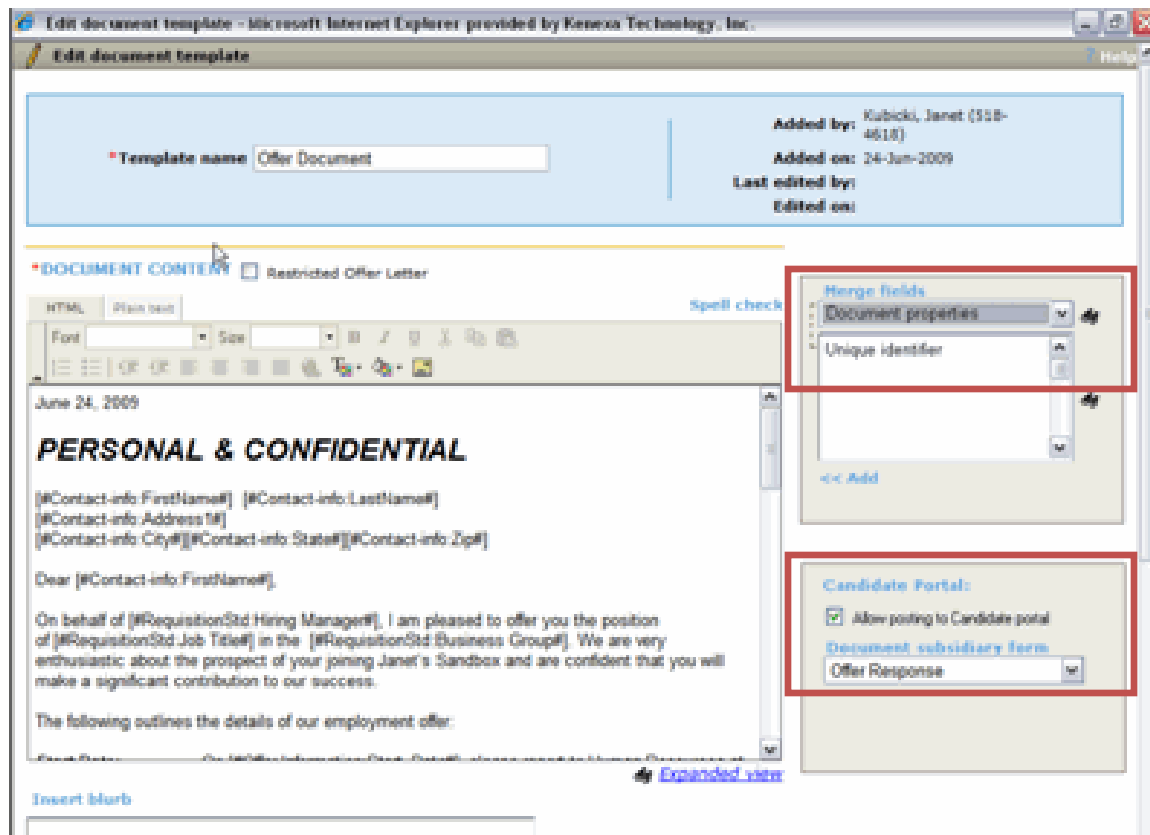
- The **Document properties** merge field category is included in document templates that are used with document subsidiary forms and Candidate Portal activities. This category includes the **Unique Identifier** merge field. Both are available for use in document templates only when the Candidate Portal client setting is enabled.

The **Unique Identifier** merge field is the logical and visual link between the offer letter (PDF) and the Offer response (the Document subsidiary form). You can place this merge field anywhere within the Document template.

- The Candidate portal section appears on the document template if the client setting of Candidate portal is enabled.

Select **Allow posting to Candidate portal** to enable the document template for the candidate portal. Once checked, any document created with this template (past or present) can be posted to the Candidate Portal.

Identify which document subsidiary form should be attached to this document. This field is not required if you want to post a document created in 2xB but do not need a documented response.

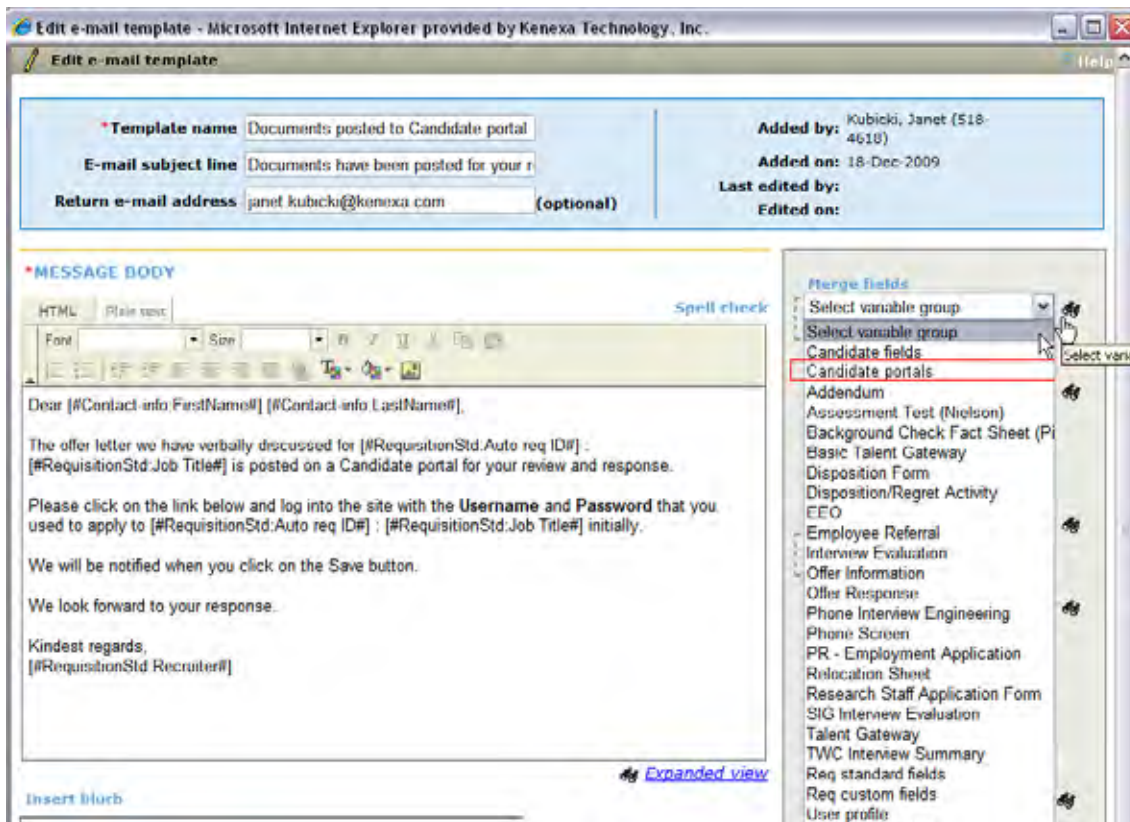


7. Create Offer E-mail Template(s) for Offer E-mail

In 2xB, update or create an e-mail template with a link to the Candidate Portal.

The **Candidate portal** merge field category includes the **Candidate portal** merge field. This category of tokens is available for use in e-mail templates only when the Candidate Portal client setting is enabled.

Note: The name of the “Candidate Portal” merge field category and token cannot be changed.



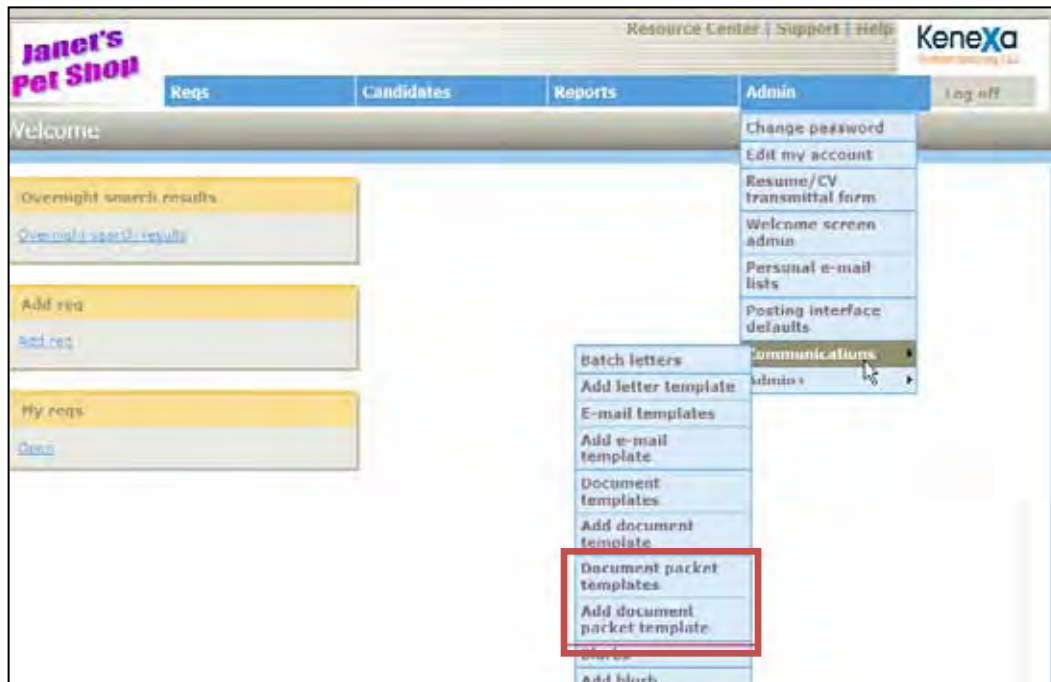
8. Create Document Packet Template (NEW functionality)

To add or administer document packet templates:

1. Select **Admin > Communications > Document packet templates**. (This requires the “Document packet template – Administer” privilege.)

–OR–

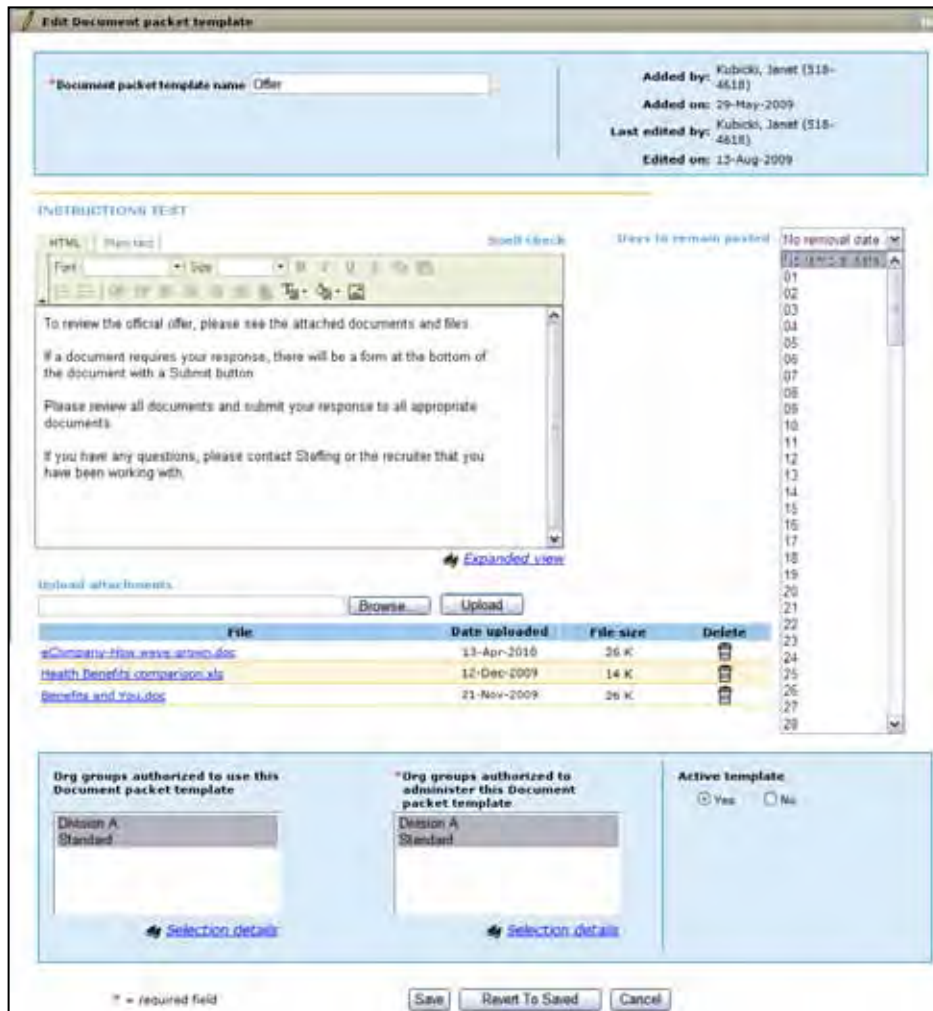
You can also add a template by selecting **Admin > Communications > Add document packet template**. (This requires only the “Document packet template – Add” privilege.)



The Document packet templates administration screen displays the document packet templates.



2. In addition to adding a new template from this screen (click **Add Document packet template** action), you can also view, edit, deactivate/reactivate, or delete templates. Choose the appropriate icon for the template of interest.
3. When adding or editing a document packet template:
 - Enter the name, instructional text (no merge fields in this text), days the packet is to remain posted.
 - Browse to and upload the files you wish to include in the packet. Those already included are listed below the **Browse** and **Upload** buttons. Click their links to display them; click the delete icon to remove them from the packet.
 - Select the Org groups authorized to use or administer the template.
 - Select **Yes** or **No** for **Activate template**.



4. When finished adding or editing the template, click **Save**.

2x BrassRing User Experience

Who does this: 2x BrassRing Users

Once the Candidate Portal has been configured and the necessary document and document packet templates prepared, 2xB users with appropriate user type privileges can create and post individual documents as well as document packets to the Candidate Portal.

Steps may include:

1. **Creating documents (such as an Offer)**

From a Req folder, select candidate(s) and click **Create document** in the **Actions** menu.

Req folder: 6724BR : Winter 2010 Internship Show Results 18 of Showing candidates 1 of

Actions [Back](#) [View req details](#) Selected candidates: Sort options Set quick filters Edit output fields Save output fields Filter this folder

Select all	Name	Viewed	Grad year	Educational Institute	Degree	GPA	HR status (click to update)	Form
<input checked="" type="checkbox"/>	Japp, Sandi	✓	1978	University of Nebraska	Bachelor of Science	4	Offer Extended	
<input checked="" type="checkbox"/>	Bockelman, Robbi	✓	2009	University of Indiana	Bachelor of Arts	3.9	Offer Extended	
<input checked="" type="checkbox"/>	Hoyer, Denis	✓	2011	University of California	Bachelor of Science	3.8	Offer Extended	
<input type="checkbox"/>	de la Garcia, Ferdinand	✓	1981	Heald College	Associates	3	Not Interested	
<input type="checkbox"/>	Howell, Jeffrey	✓	2009	University of Southern California	Bachelor of Science	2.5	Not Interested	
<input type="checkbox"/>	Howdan, Jeffery	✓	2009	University of Southern California	Bachelor of Science	2.5	Not Interested	

Actions: View, eMail, Talent Comparison, Update same status, Move/Copy to req, Move/Copy to folder, Send to Event Manager, Send, **Create document**, Email agency contact, Remove agency association, Print resume/CV, Forward via e-mail

Select the document template.

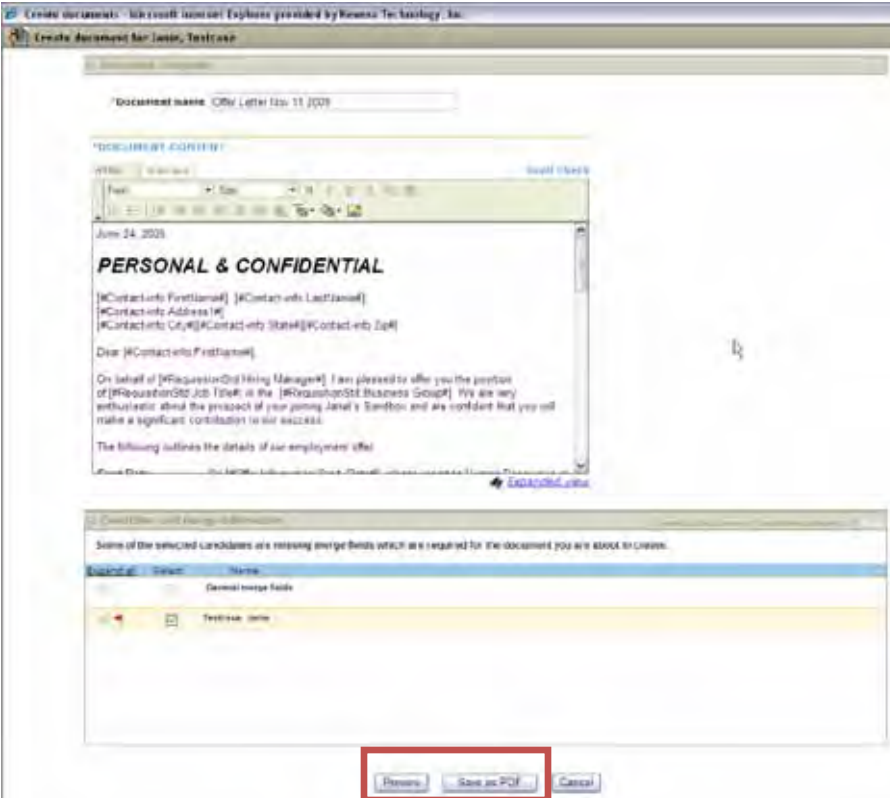
Create document for Testcase, Janie - Microsoft Internet Explorer provided by Kenexa Technology, Inc.

Create document for Testcase, Janie Help

Select document template

Offer Document [Selection details](#)

Edit as necessary, click **Preview** to preview it if desired, and click **Save as PDF**.



The document is saved to the **Attachment** tab on the Talent Record and is now ready to be posted. Repeat until you've created all necessary templated documents for your document packet.

2. **Posting individual documents to the Candidate Portal**

From the **Attachments** tab of the candidate's Talent Record, click the white pushpin icon in the **Posted on Portal** column of the document to be posted. Click **Yes** to confirm. The pushpin becomes orange and the posted information is added to the **Communications** tab on the candidate's Talent Record. Repeat for all necessary templated documents.

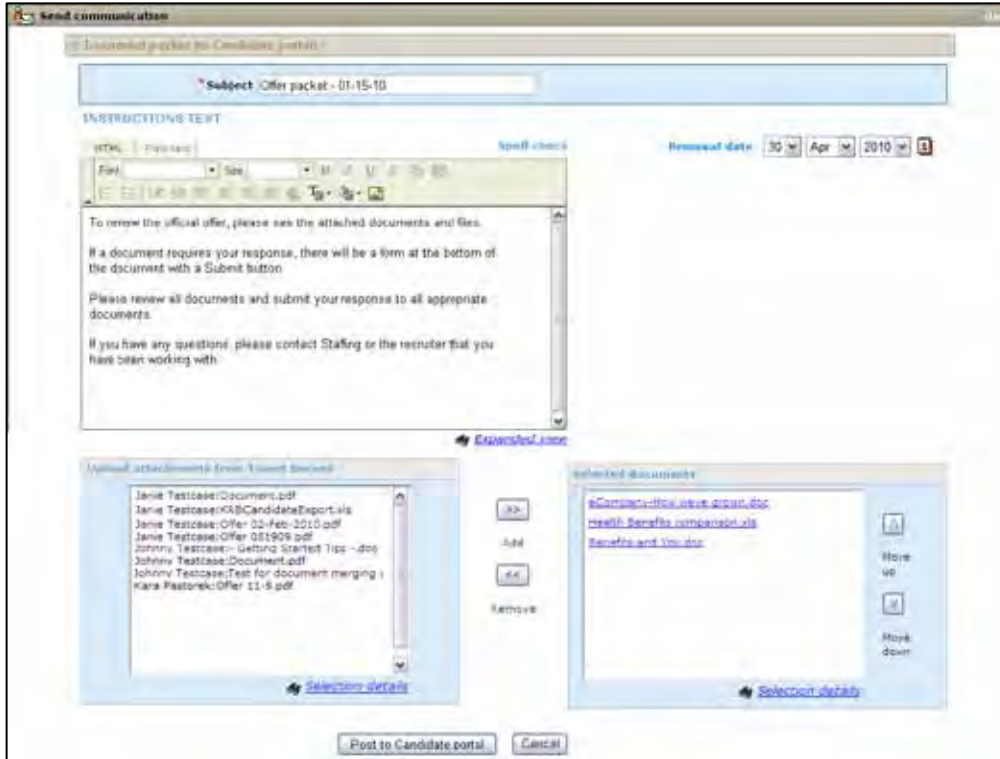
3. **Posting document packet to the Candidate Portal / Sending communication to candidates**

From the Req folder to which the candidate or candidates are filed, select the checkbox for each candidate to receive the document packet and click **Send communication** in the **Actions** menu. (You can also do this task from the candidate's Talent Record accessed from within the Req folder, clicking **Send candidate communication**.)

The Communications screen pops up.

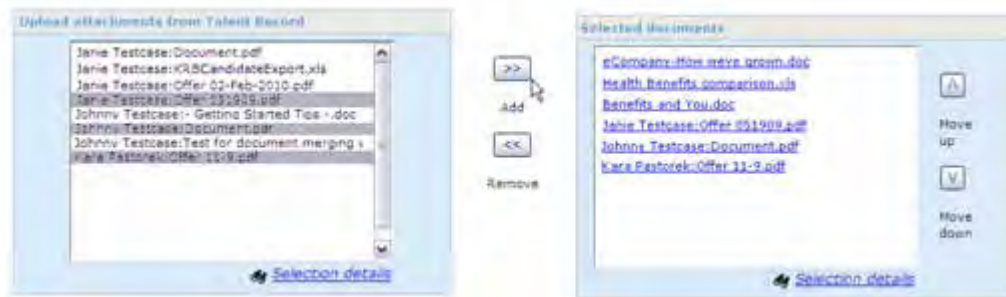


Select the desired Document packet template (only those to which the user has access (via org groups) appear in the list) and click **Go**.



On the **Send communication** screen:

- Enter a subject and edit the instructional text (no merge files) and removal date if desired.
- **Uploaded attachments from Talent Record** pane shows all attachments created with document templates for all selected candidates; candidate name precedes PDF document name. Some may have an associated document subsidiary form. Any external files uploaded to the document packet template are already listed in the **Selected documents** section.



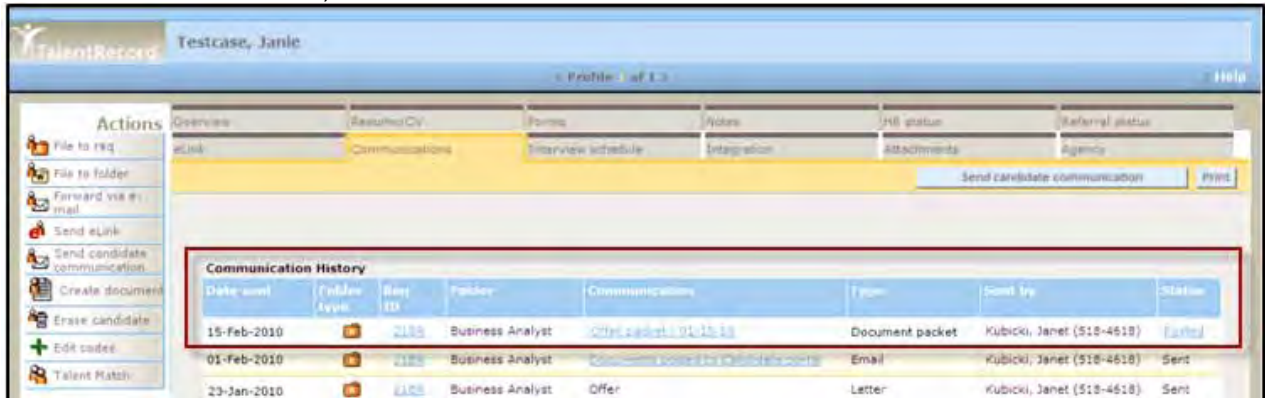
Click arrow buttons to add, remove, and reorder these files (removed external files will appear above attachments in the “Upload” list). When the packet is set, click **Post to Candidate portal**.

Note: Although attachments for several candidates may appear in the “Selected documents” pane, when the candidates are viewing their document packet, only their attachment(s) are visible to them.

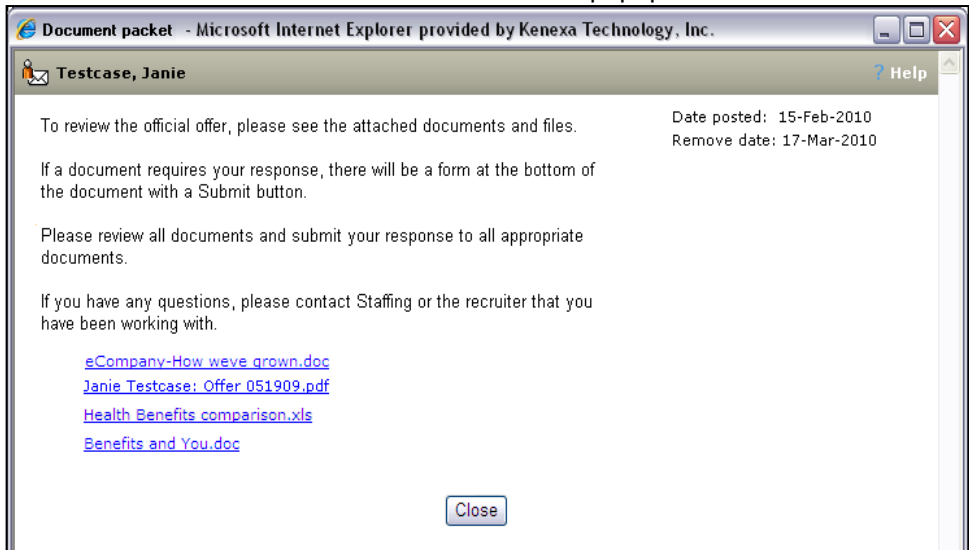
4. **Viewing Communications history**

When you post (or remove) a document packet, the system adds the record to the Communications tab of the Talent Record. (You can remove a packet by clicking the **Posted** link in the **Status** column, then click

Yes to confirm the removal.)



To view the packet (if you have **Document packet – View** privilege), click the packet name link in the **Communications** column. You'll see a preview that includes the instruction text and file list – click the file name links to launch and view individual files in a popup window.



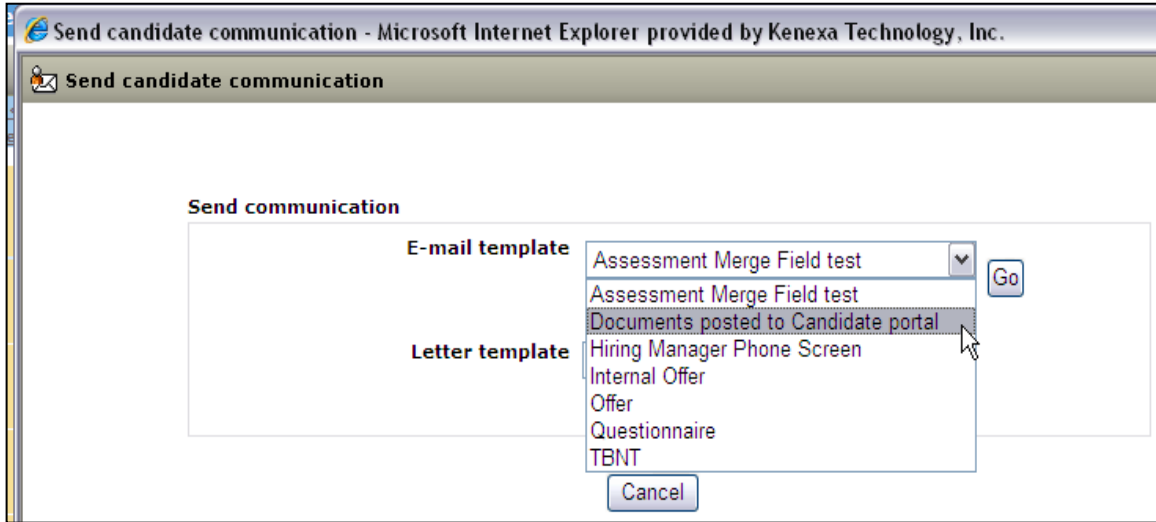
5. Viewing Attachments tab

The pushpin/envelope icon indicates an attachment posted as part of a document packet when you are viewing attachments history on the Talent Record Attachments tab. You cannot remove these attachments individually.

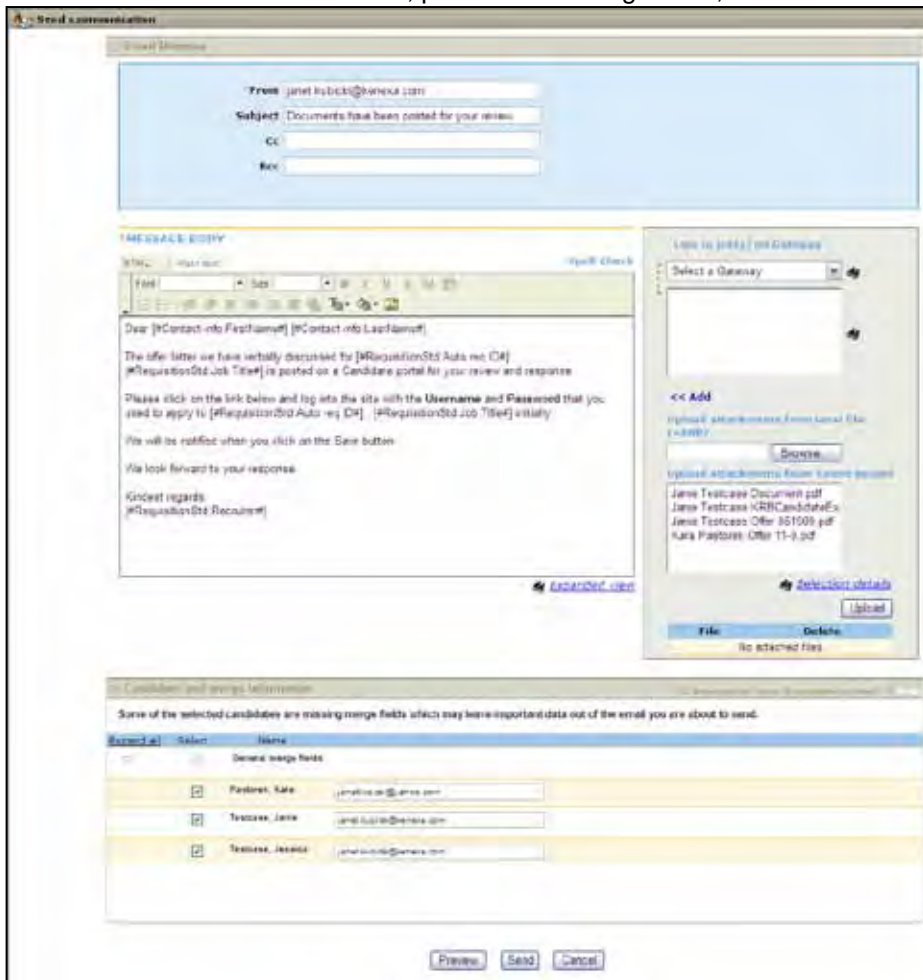


6. Email Notification to Candidate

You may want to notify candidates that documents are posted on the portal. From a Req folder or candidate list, select them and click the **Send communication** action. Choose an email template and click **Go**.

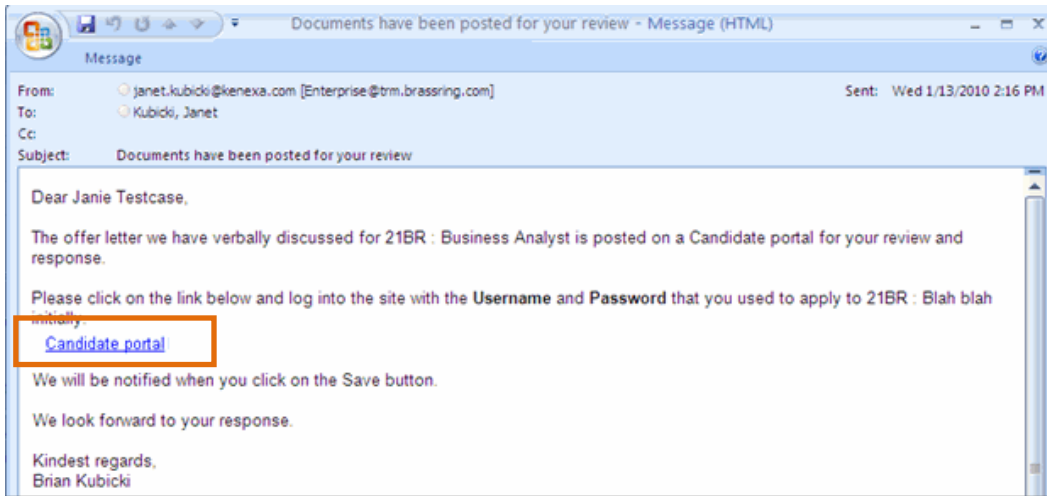


You can review or edit the content, preview with merged text, de-select candidates. When set, click **Send**.

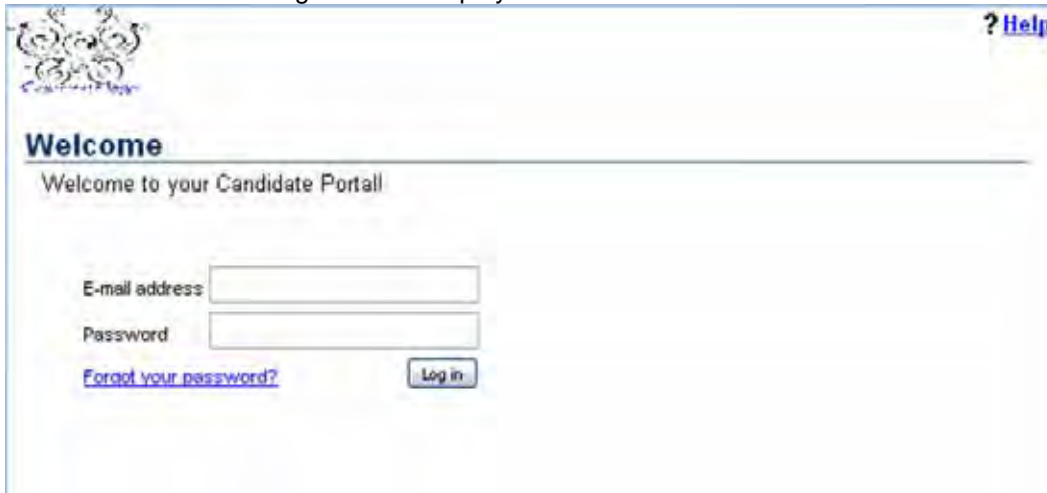


Candidate Experience

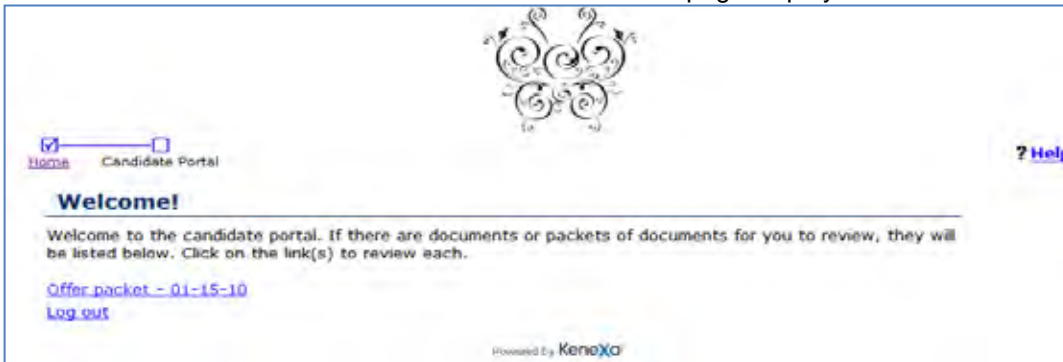
The candidate opens the e-mail and clicks on the Candidate Portal link.



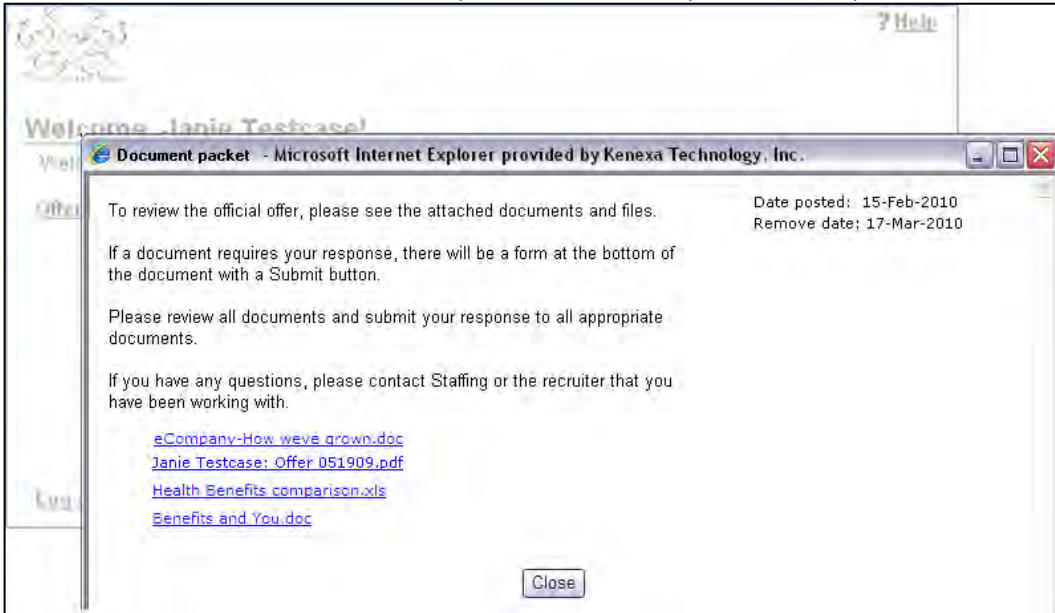
The **Candidate Portal** login screen displays.



The candidate logs in to the Candidate Portal Talent Gateway with the username and password that he or she used to apply to the job. The system must authenticate the candidate's identity to take the user to the right link on the Candidate Portal. The Candidate Portal "welcome" page displays.



The links shown include all posted document packets as well as any individually-posted documents. The candidate clicks the document link to open a document or packet in a separate window.



For packets, the candidate clicks individual document links to open and view them.



For offers with a response form, that form is visible below the offer document. The candidate must complete it and save it.

The offer response is technically a “document subsidiary form,” created when the candidate clicks **Save**. The candidate can click on the link to view it but cannot edit it or remove it. Document subsidiary forms are configurable (like the Req subsidiary form or a candidate form). The Document subsidiary form template to be used with the offer document is identified in the document template. If configured, an email is sent to the user(s) selected in the ‘Notify users upon form creation’ setting of the Document subsidiary form.

Recruiter’s Experience when Document Saved on Candidate Portal

Back in 2x BrassRing, on the **Attachments** tab of the Candidate’s Talent Record, an icon appears in the **Document Sub Form** column for the offer letter, indicating that the document is available for action by the Recruiter.

Date-added	Added by	Name	Category	File Size	File Name	Download icon	Document sub form icon
10-Apr-2009 12:03:06	Kubicki, Janet (518-4618)	Enterprise	Req	1K	DocumentSubForm		
19-May-2009 17:24:24	Kubicki, Janet (518-4618)	Enterprise	Req	1K	OfferLetter		
15-Aug-2009 16:09:58	Kubicki, Janet (518-4618)	Enterprise	Req	14K	OfferLetterGood		Document sub form icon

Any user with “view all” or “modify all” or “delete all” access to Document subsidiary forms can see the icon. Click the icon to view the document subsidiary form.

If you have the requisite privileges, you will see the Edit and/or Delete form icons. Users with View all access can see the eLink icon.

Offer Response - 21BR : Blah blah for Testcase, Janie - Microsoft Internet Explorer provided by Kenexa Tec...

Offer Response - 21BR : Blah blah for Testcase, Janie

eLink form Edit Delete form

Acceptance/Decline of Offer

DocumentID 189RFG94GQ32 - 21BR - Business analyst

Candidate First Name Janie

Candidate Last Name Testcase

Requisition ID 21BR

Job Title Business Analyst

Offer Response Accept

Decline Reason (Please only complete if you are declining this offer.)

By checking this box, I acknowledge that I have read and agreed to the [Terms and Conditions](#) referenced. I have read the Terms and conditions

Date added 13-Aug-2009 11:03 am janetkubicki@yahoo.com

Close

Your organization can configure access to these actions to work for your business process.

Candidates – Candidate Tiers

Candidate tiers allow you to structure multiple tiers of candidates within a Req folder so that users can work with a more manageable number of candidates. Candidates within the first tier appear in the Req folder until they've all been moved into a final non-hire status. At that point, candidates in the next tier appear in the folder for consideration and disposition. This process continues with succeeding configured tiers.

Product	<ul style="list-style-type: none">▫ 2x BrassRing▫ New UI▫ Workbench Self-Service▫ Talent Gateways	<ul style="list-style-type: none">▫ Agency Manager▫ Data Insight Tool▫ SmartApproval▫ Other
Visible Changes	<ul style="list-style-type: none">▫ No – contact your CSC for implementation details.▫ Yes – details in <i>Visible Changes</i> document sent for each release build.	
How do I get this feature?	<ul style="list-style-type: none">▫ Automatic – see details below.▫ Specific conditions required – see details below.▫ Configuration required – see details below.	

Benefits

This feature manages the candidate pool shown within the Req folders so that recruiters have more manageable numbers of candidates when working with high-volume reqs.

Feature Description

Candidate tiers allow you to structure multiple tiers of candidates within a Req folder, based upon sets of automated rules (such as proximity to the req's location). The rules are set up for your account in the Rules Automation Manager. As candidates apply, these automated rules determine each candidate's tier. Recruiters and hiring managers can view and disposition the first tier before seeing and dealing with each succeeding tier. Administrators define the tiers, and handle any exception processing such as changing the visible tiers within a Req folder.

The feature is enabled by a new client setting, and Workbench is the vehicle for setting user permissions and defining the tiers by req template. A new attribute for the candidate/job combination sets the appropriate tier for the candidate, and each req has logic to display the appropriate tier.


Tier Logic

For any req, candidates in the first tier are shown first within the Req folder for all user types. Once all candidates go to a final (non-Hire) HR Status, then the next tier is automatically opened and shown within the Req folder, based on the ordering configured for your site.

An initiation period, in hours, is also defined for your req templates, and applies to tiers 2 and below (3, 4, 5 etc.). This initiation period starts when the req is first posted to any Talent Gateway. Only candidates in tier 1 can be seen during the initiation period. Tiers with order of 2 and below cannot be seen at all during this initiation period. After the initiation period has elapsed:

- Tier 2 candidates can be seen once no candidates remain in that first tier (meaning all candidates have gotten to a final non-hire HR Status).
- When no candidates remain in tier 2, the next tier is shown. This process of opening new tiers once no candidate remains in the previous tier continues, with each lower tier opening only after all candidates have moved out of the tier above it. That is, so long as one or more candidates remain in a tier, the next lower tier does not open.
- If a candidate is hired from a certain tier, then no additional candidates in the lower tiers are shown, meaning that they did not formally enter the applicant pool.

- Users with privileges can [update the visible tiers](#) for a req at any point in time, skipping the order of tiers defined in the configuration, with the req action for editing visible tiers described below.




Candidates who have not been assigned a tier will appear in the Req folder as “Not Specified.” These candidates will always be in the Req folder no matter which tier is visible. They do not have to be dispositioned to a final non-hire status in order for the next tier of candidates to appear. Candidates added manually to Req folder will have a status of “Not Specified” as well.

Viewing Candidates in Req Folder

Users viewing a Req folder see a list of candidates in a tier that is considered visible at that time, as well as candidates with no specified tier (null tier).

Select all	Name	Viewed	Candidate tier	Notes	Forms	HR status	Candidate type	HR status (click to update)	HR status date	Updated by
<input type="checkbox"/>	Blah, Blah	✓	Tier 1	+			External	Start Background Check	15-Feb-2010	Castles, John
<input type="checkbox"/>	Testcase, Dana	✓	Tier 1				External	It-Filed	28-Apr-2010	Filer, Auto ()

The visible tiers cascade such that if tier 2 is showing, then null tier, tier 1, and tier 2 candidates all display. When all candidates in the last visible tier get to a final non-hire HR status, then the next tier is automatically opened up within the Req folder.



Additional features in 2xB from Req folder:

- “Candidate tier” column can be sorted from “Sort options” and from the column header.
- “Candidate tier” can be filtered from “Set quick filters” and from the column header.
- New UI: Output field, Sorting, and Filtering are also available. Clicking on “View” link when looking at candidates from “My Candidates” goes to new “current tier” page, the same as when searching for candidates.

Changing a Candidate's Tier when Candidate/Tier is Displayed

User types with permission can change a candidate's tier:

1. Click the tier link in the grid (static text appears for users without permission). The **Update candidate tier** page appears.

Update candidate tier for Hinebaugh, Margaret - Microsoft Internet Explorer provided by Kenex...

Update candidate tier for Hinebaugh, Margaret ? Help

Current tier	Updated by	Date updated
Tier 1	Kenexa 2x BrassRing system update	27-May-2009

Select candidate tier

[Selection details](#)

Candidate tier history

Historical tier	Updated by	Date updated
External	Kenexa 2x BrassRing system update	27-May-2009

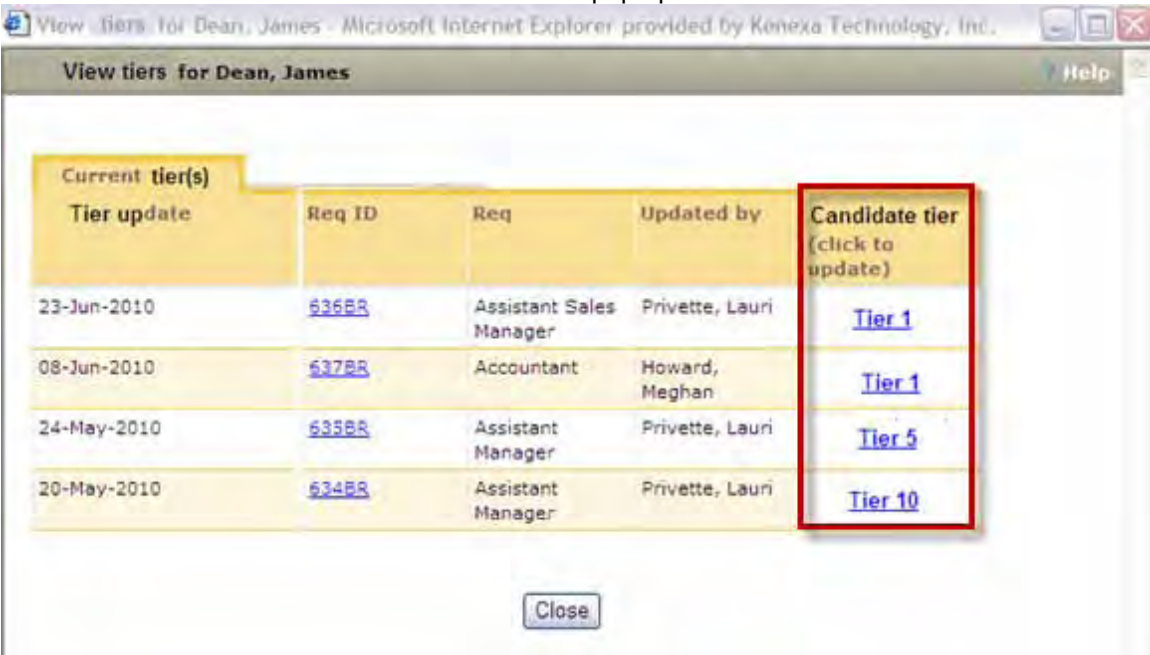
2. Select a new tier from the list of tiers active for the req, and click **Save**.

Changing a Candidate's Tier when Candidate/Tier is Not Displayed in Req Folder

When a candidate is not visible because his or her tier is not yet opened, privileged users can still update a candidate's tier from search results.

1. Search for the candidate, using the quick Search Candidates bar or Search Candidates.

- Click the **View** link in the Candidate tier column to pop up the **View tiers** window.



–OR–

Open the candidate's Talent Record and click the new **Tiering** tab available for viewing and updating the tiers.

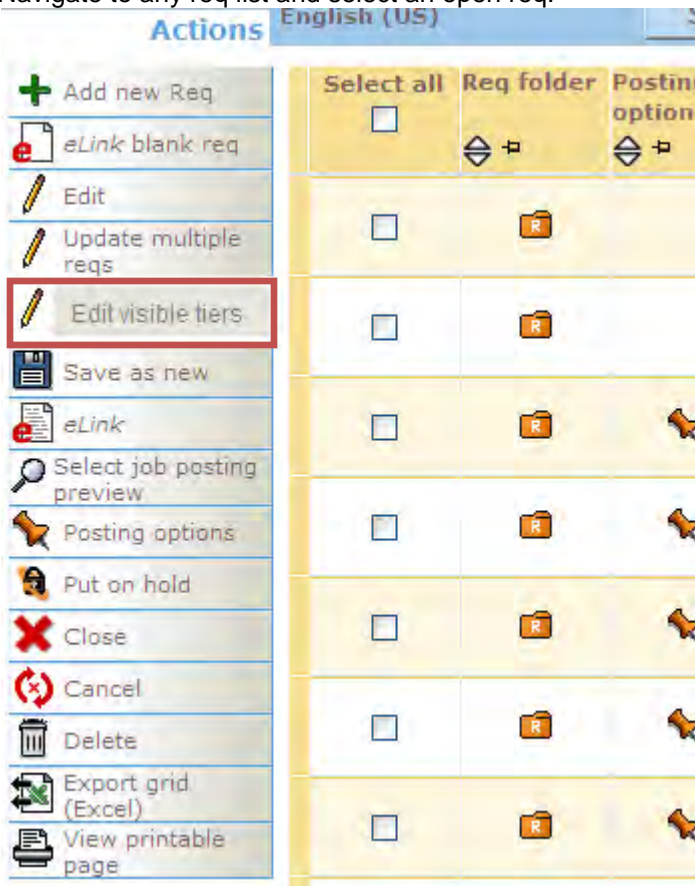


- Click the link to open the **Update candidate tier** screen and update the tier.

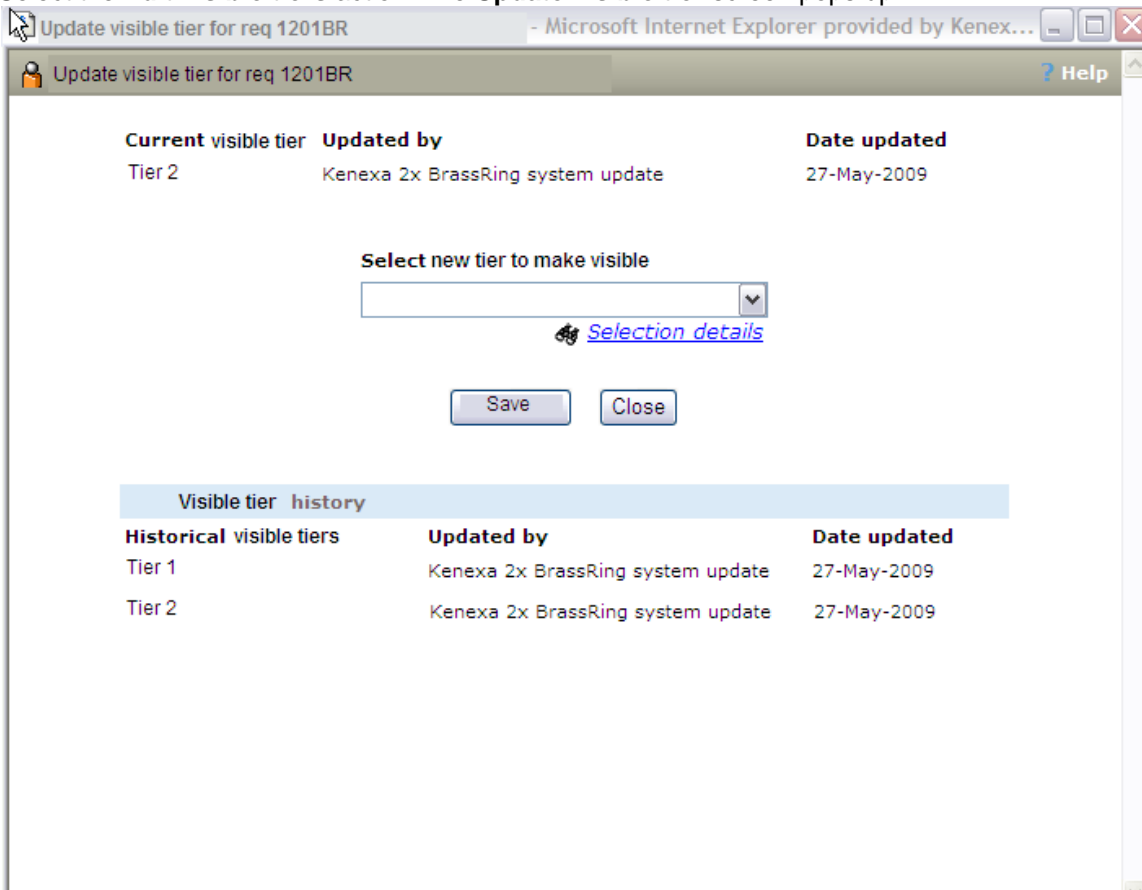
Making Different Tiers Visible for a Req

User types with permission can change the tier that is visible for a selected req:

1. Navigate to any req list and select an open req.



2. Select the **Edit visible tiers** action. The **Update visible tier** screen pops up.



3. Select one of the active tiers that is not yet visible, and click **Save**.
4. The pop-up closes and the new tier selected becomes the currently visible tier. Candidates in that tier, as well as those in all higher order tiers appear in the Req folder. For example, when tiers 1 and 2 were visible, selecting tier 4 also makes tier 3 visible.

Data Insight Tool

For clients using Data Insight Tool custom reports, Candidate Tiering fields are available for reporting on candidates who have applied to a req, and for reporting which tier(s) were visible at the req level. Use the Filter Selection and Output Selection Tools in **Reports > Data Insight Tool > Manage Templates > Create new template | Edit template** to add these fields.

Template Workshop

Filter Selection Tool

Select up to 10 filters to add to the Filters Worksheet. To switch to the Output Selection Tool, click the **Output Worksheet**.

- Addendum Forms
 - Search Log
- Job Application
 - Code Type
 - Site
 - General
 - Gateway Submission
 - Job Submission
 - Candidate tier status
 - Candidate tier name
 - Candidate tier order

Add to Worksheet ↓

Template Workshop

Output Selection Tool

Select up to 75 fields to add to the Output Worksheet. To switch to the Filters Selection Tool, click the **Filters Worksheet**.

- Code
- Code Description
- Code Type
- Candidate tier status
- Candidate tier
- Candidate Type
- Date applied
- How Received
- FolderResumeID
- Tracking Logic

Add to Worksheet ↓

Field can be used as a filter	Field can be used as an output field
Requisitions > General Fields > Requisition Tier Status (filter on Visible or Not Visible)	Requisitions > General Fields > All Requisition Tiers (output Name, Order, or Name & Order)

Field can be used as a filter	Field can be used as an output field
Requisitions > General Fields > Requisition Tier Name (filter on tier names)	Requisitions > General Fields > Visible Requisition Tiers (output Name, Order, or Name & Order)
Requisitions > General Fields > Requisition Tier Order (filter on tier order numbers)	Requisitions > General Fields > Not Visible Requisition Tiers (output Name, Order, or Name & Order)
Job Application > General > Candidate Tier Status (filter on Visible or Not Visible)	Job Application > General > Candidate Tier (output Name, Order, or Name & Order)
Job Application > General > Candidate Tier Name (filter on tier names)	Job Application > General > Candidate Tier Status (output Visible or Not Visible)
Job Application > General > Candidate Tier Order (filter on tier order numbers)	

How Do Clients Get this Feature?

This feature is controlled by a new client setting and new user type privileges. Please contact your CSC for more information about enabling this feature.

Workbench Self-Service

Workbench Self-Service task include:

- Assigning user type privileges
- Associating tiers (once they have been set up for your account) with req templates.
- Adding Candidate Tier to Default Output Field List

Assigning Privileges

Who does this: Certified Workbench User, all tiers

Once Candidate Tiers are enabled for your account, four new user type privileges that support candidate tiers are available (in **Tools > Users > User types > Edit type permissions**):

Candidate Actions 2 privileges

- **Candidates – add/edit tier for all reqs** to add or edit the candidate’s tier for any req. Users of this type can change the tier via the link on the candidate grid and Talent Record grid.
- **Candidates – add/edit tier for my reqs** to add or edit the candidate’s tier for reqs with which the user has a “my reqs” relationship. Users of this type can change the tier via the link on the candidate grid and Talent Record grid.

Reqs privilege

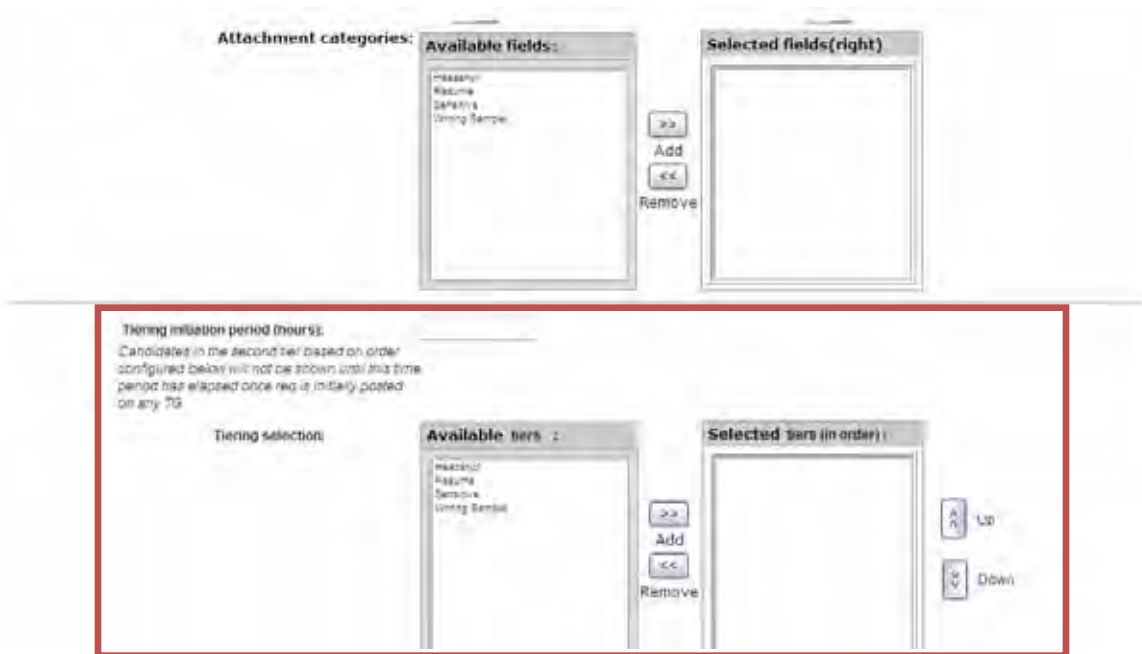
- **All reqs – edit visible tiers** to edit the active tiers shown within any req via the req action link.

My Reqs privilege

- **My reqs – edit visible tiers** to edit the active tiers shown within their own reqs via the req action link.

Associating Tiers with Req Templates

Associate the tiers defined for your site with req templates, selecting **Tools -> Forms -> Reqs -> Req forms -> Edit form attributes**. You define the initiation period and tiers to use for the selected req template.



Tiering initiation period (hours) is an integer representing number of hours (from when the req is initially posted to any TG) that candidates in the second tier and below will not be seen in the req folder. The number cannot include decimals, and cannot exceed 999. After that period elapses, the tiering logic kicks in for the req folder, which may now include second tier candidates and below.

Tiering selection represents the ordered list of tiers (top is first, second is second, etc.).

Adding Candidate Tier to Default Output Field List

Tools -> Settings -> Fields -> Output fields



Candidates – Send Candidate Email Action

A new **Send Candidate Email** candidate action allows you to create and send an ad hoc email message. The action requires a new user type privilege.

Product	<ul style="list-style-type: none">⌘ 2x BrassRing⌘ New UI⌘ Workbench Self-Service⋮ Talent Gateways	<ul style="list-style-type: none">⋮ Agency Manager⋮ Data Insight Tool⋮ SmartApproval⋮ Other
Visible Changes	<ul style="list-style-type: none">⌘ No – contact your CSC for implementation details.⋮ Yes – see the <i>Visible Changes</i> document sent out for each release build.	
How do I get this feature?	<ul style="list-style-type: none">⋮ Automatic – see details below.⌘ Specific conditions required – see details below.⋮ Configuration required – see details below.	

Benefits

This feature provides a convenient way to send candidates ad-hoc emails.

Feature Description

A new user type privilege gives you access to the **Send Candidate Email** candidate action, which opens a pop-up email editor screen where you can create and send an email message. The action is available in both the new UI and the classic UI.

You access the **Send Candidate Email** action from:

- Req or working folders (by selecting a req and then selecting up to 50 candidates)
- Candidate’s Talent Record
- Candidate Search Results (selecting up to 50 candidates).

From Candidate Results for a req in New UI



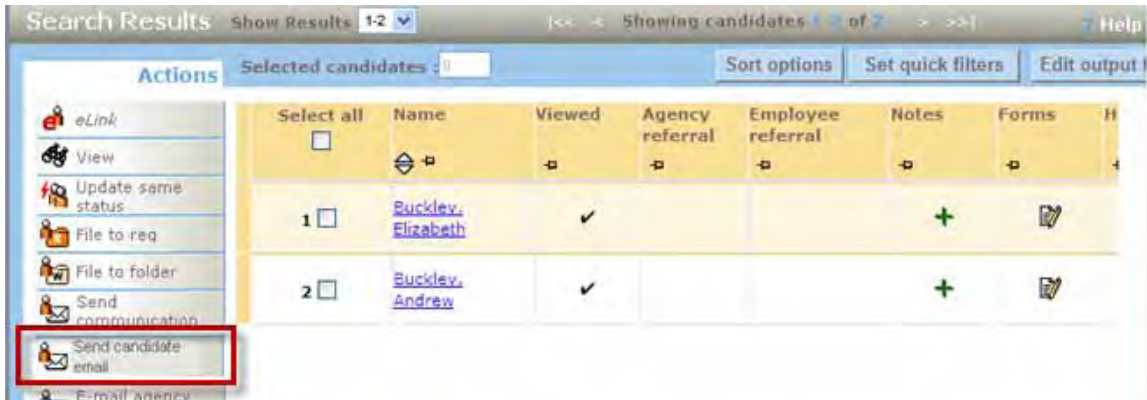
From classic UI Req folder



From Talent Record



From Search Results



To send the email:

1. Click **Send candidate email**. The Candidate email screen opens in a pop-up window.

*** From** laurel.buckley@kenexa.com

To (e-mail address) laurelann@yahoo.com, judy.king@gmail.com

Cc: (system users) Barre, Pradeep
Bojkova, Liliya
Bradley, Keith
Buckley, Laurel
Castles, John

[Selection details](#)

Cc: (non-system users) laurel.buckley@kenexa.com

Separate multiple users by comma (,); this field may not contain spaces.

*** Subject**

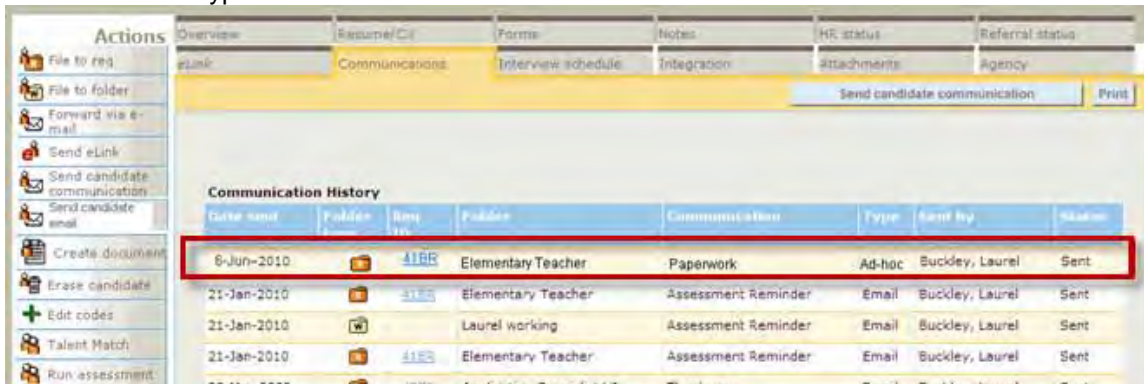
Your message

* = required field

Send Clear Cancel

2. Complete the email fields:
 - From and To fields are pre-populated; only the From field is editable.
 - Copy recipients you specify will receive a copy of each email generated by the system. If five candidates are selected, five emails will be sent, and each person being copied will receive five separate emails.
 - Subject cannot exceed 75 characters.
 - Message accepts html and special characters but cannot exceed 3000 characters.
3. Click **Send** to send the email to the candidate(s) with email addresses on file. (**Clear** clears all fields; **Cancel** closes the page without sending or saving.)

Once the message is sent, a record appears on the Communications tab of the candidates' Talent Records, with communications type of **Ad hoc**.



If your account stores communication history, then the subject text in the Communications column links to a copy of the email that was sent.

How Do Clients Get this Feature?

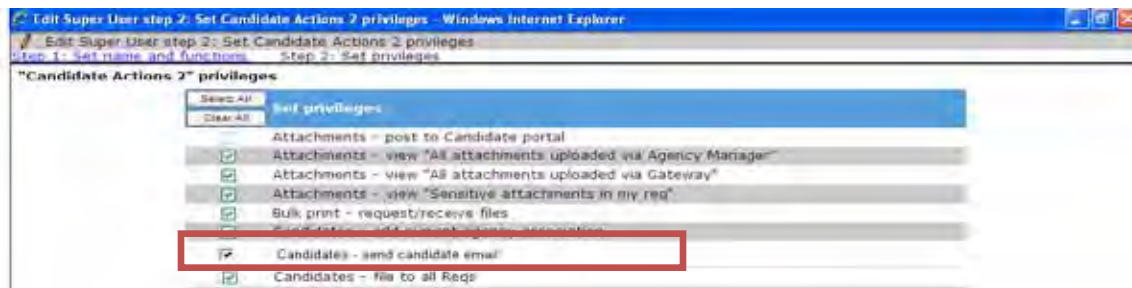
This feature is controlled by a new user type privilege, **Candidates – send candidate email**. Please contact your CSC or Certified Workbench User for more information.

Workbench Self-Service

Who does this: Certified Workbench User, Tier 1 and above

In Workbench, enable this feature by setting the new user type privilege, **Candidates – send candidate email**.

Tools > Users > User Types > Edit type permissions [for selected user type] > Set privileges [for Candidate Actions 2]



Communications – Auto-Fill Fields for Blurb Conditions

This feature affects clients who use auto-fill fields to populate their candidate forms. On the **Add blurb** and **Edit blurb** pages in 2x BrassRing, users can now select an auto-fill field value as the value that will satisfy a condition in a conditional blurb.

Product	<ul style="list-style-type: none"> ▣ 2x BrassRing ▣ New UI ▣ Workbench Self-Service ▣ Talent Gateways 	<ul style="list-style-type: none"> ▣ Agency Manager ▣ Data Insight Tool ▣ SmartApproval ▣ Other
Visible Changes	<ul style="list-style-type: none"> ▣ No – contact your CSC for implementation details. ▣ Yes – see the <i>Visible Changes</i> document sent out for each release build. 	
How do I get this feature?	<ul style="list-style-type: none"> ▣ Automatic – see details below. ▣ Specific conditions required – see details below. ▣ Configuration required – see details below. 	

Benefits

This feature expands users' options when setting blurb conditions.

Feature Description

Users with the appropriate user type privileges will be able to select auto-fill fields from the list of fields for the **Display blurb when** setting on the **Add blurb** and **Edit blurb** pages in 2xB.

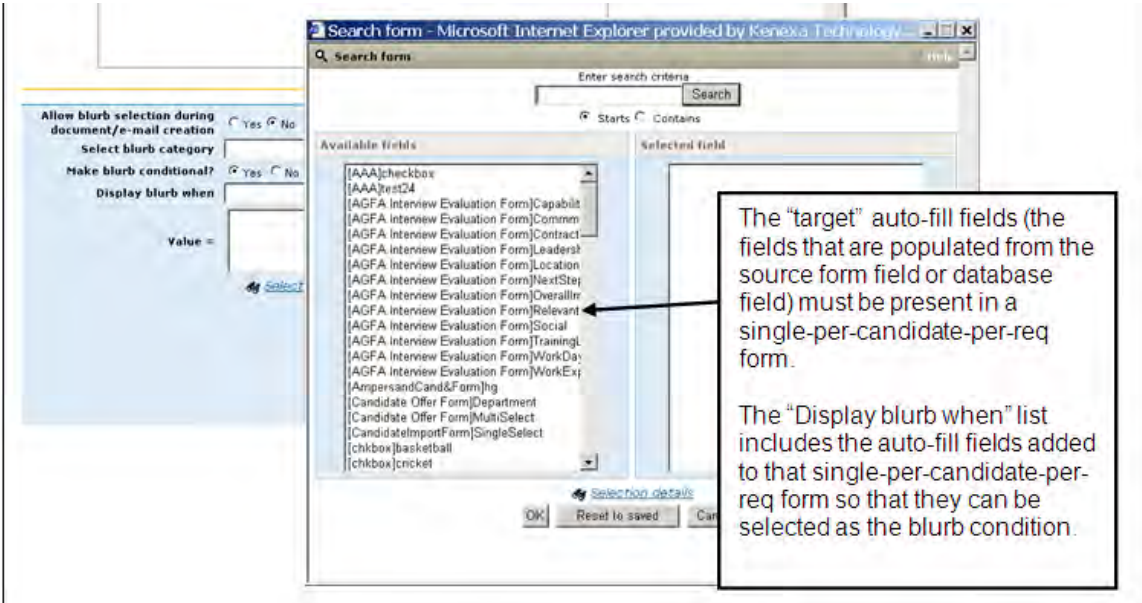
To set blurb conditions:

- In 2xB, navigate to the **Add blurb** or **Edit blurb** page. users require :
Admin > Communications > Add blurb
 –OR–
Admin > Communications > Blurbs > Edit [selected blurb]
- To create a conditional blurb, set **Make blurb conditional** to **Yes**.
 If there are 200 or more field selections, this enables the **List >>** button for the **Display blurb when** setting.



- Make a field selection.
If it is enabled, click **List >>** beside **Display blurb when**. The Search form window opens. It lists all fields available for selection for the condition, which includes auto-fill fields (populated from the source form field or database field). Select a [Form]Field combination and click **OK**.

Note: Only *single-select* or *radio button* auto-fill fields present in a Single per-candidate/req form are available.

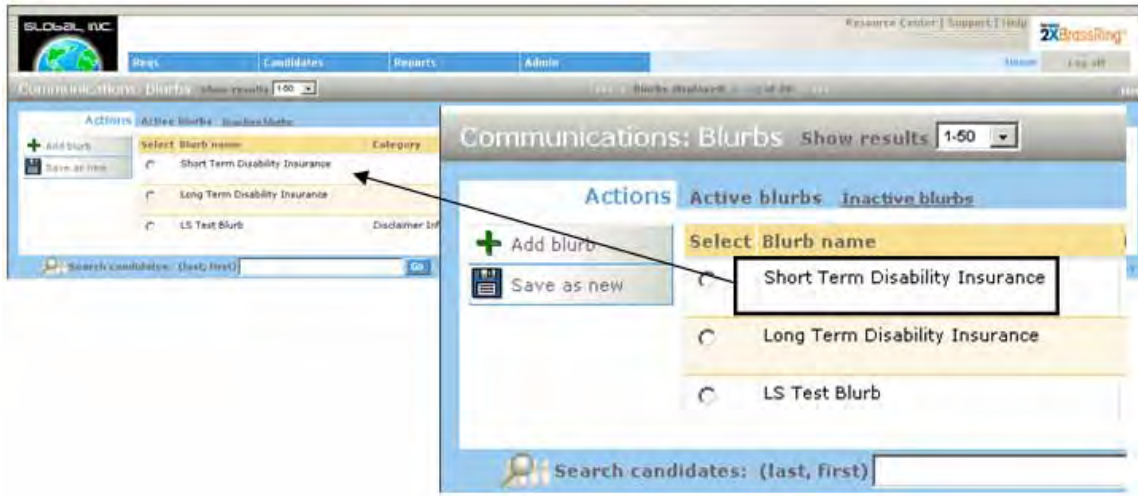


- Select the **Value =** value for the condition. (If selection options are not displayed, you may have to choose additional selection details for the field you selected. Click **Selection details**, select the appropriate field detail, and click **OK**.)



- Finish configuring or editing the remaining settings as necessary and click **Save**.
- Click **Close** to close the "Blurb saved successfully" confirmation page.

The newly created conditional blurb is added to the **Communications: Blurbs** page in 2xB.



How Do Clients Get this Feature?

This feature is available automatically without configuration. However, clients must configure auto-fill fields in the correct manner, and add the auto-fill fields to Single per-candidate/req forms where desired. Once added, the fields will automatically be displayed for selection from the “Display blurb when” dropdown list. Only auto-fill fields of the control type of single-select and radio button are supported.

Sample Scenario

For the form:

Candidate form X is the source of the auto-fill field “Basis of Eligibility to Work,” which has four options:

U.S. Citizen, Permanent Resident, H1B Visa Holder, and None of the above.

The form field is populated and submitted when the candidate answers the question on Form X, which is a form required when he or she applies to the job.

Form Y also includes the “Basis of Eligibility to Work” field, configured as “autofill” of type single select. Form Y is required as the result of some event, for example as the result of an HR Status update when the candidate is further along in the hiring process. If Form Y is required at that point, the candidate “creates” an instance of the second form when he or she opens it, and the field is auto-populated from the value saved for Form X.

For the conditional blurb:

Your organization provides a particular benefit to an H1B holder, so an offer letter to this type of candidate should contain an extra paragraph describing the benefit (i.e., conditional blurb). You could use a document template for an offer letter that includes a conditional blurb based on the auto-fill field in Form Y. The condition to be defined is “Display this blurb when ‘Basis of Eligibility to Work’ = H1B visa” in Form Y. If the system finds that value (H1Bvisa) in the auto-fill field on Form Y, it displays in the offer letter the blurb that meets that condition.

A 2xB administrator first creates the blurb, setting the condition as described using **Add/Edit blurb**, and then adds that conditional blurb to the document template for the offer letter (using **Add/Edit document template**).

Communications – eLink Default Text

A new email template setting will give users the ability to edit the default text in the eLink.

Product	<ul style="list-style-type: none">Ⓟ 2x BrassRing⋮ New UIⓅ Workbench Self-Service⋮ Talent Gateways	<ul style="list-style-type: none">⋮ Agency Manager⋮ Data Insight Tool⋮ SmartApproval⋮ Other
Visible Changes	<ul style="list-style-type: none">Ⓟ No – contact your CSC for implementation details.⋮ Yes – see the <i>Visible Changes</i> document sent out for each release build.	
How do I get this feature?	<ul style="list-style-type: none">⋮ Automatic – see details below.⋮ Specific conditions required – see details below.Ⓟ Configuration required – see details below.	

Benefits

The user will be able to send the eLink(s) with the default text or edit the text when sending the eLink, which will help avoid spam filtering engines.

Feature Description

This feature will allow users to add default text in the message body of eLink messages. Once this is configured, the default text will be automatically appended to “Your Message” fields when sending an eLink.

All 2x BrassRing users who with privileges to send eLink messages can access this feature.

The following E-mail types are affected:

- **Candidate – eLink Talent Record** (Clicking on “eLink” action menu in any candidate listing page/panel or Talent Record)
- **Candidate – eLink Blank Form** (Clicking on “eLink Blank Form” in Talent Record > Forms tab)
- **Candidate – eLink Form** (Clicking on “eLink” icon in Talent Record > Forms > eLink icon in the list of available forms)

Best Practice Recommendations

This feature should be enabled through the Admin menu before the user can use it.

This feature is only available for “Candidate” eLinks.

How Do Clients Get this Feature?

A new client setting “**E-mail type configuration**” with radio button options YES/ NO is available. No is selected by default. Default text feature will be available only if the client setting is turned ON.

Workbench Self-Service


Who does this: Certified Workbench User.

Two new user privileges are created in Workbench **Tools > Users > User Types > Edit Type Permissions > Communication**. Please note that these privileges are enabled only if the client setting is turned ON.

- **System e-mail Template – View** – Allows the 2xB user to view the system e-mail templates.
- **System e-mail Template – Administer** – Allows the 2xB user to add, deactivate and delete e-mail templates.

Please note if these options are grayed out, a tool tip will provide the explanations as to why the options are grayed out.

Edit Hiring Manager step 2: Set Communications privileges	
Step 1: Set name and functions Step 2: Set privileges	
<input checked="" type="checkbox"/>	Communications - enable
<input checked="" type="checkbox"/>	Create document - edit pre-configured document name
<input checked="" type="checkbox"/>	Create document - enable
<input type="checkbox"/>	Create document - minimize Document Template section
<input type="checkbox"/>	Document packet - send
<input type="checkbox"/>	Document packet - view
<input type="checkbox"/>	Document packet templates - add
<input type="checkbox"/>	Document packet templates - administer
<input type="checkbox"/>	Document packet templates - delete
<input checked="" type="checkbox"/>	Document templates - add
<input checked="" type="checkbox"/>	Document templates - administer
<input checked="" type="checkbox"/>	Document templates - delete
<input checked="" type="checkbox"/>	E-mail templates - add
<input checked="" type="checkbox"/>	E-mail templates - administer
<input type="checkbox"/>	E-mail templates - configure for Automation Manager
<input checked="" type="checkbox"/>	E-mail templates - delete
<input type="checkbox"/>	Hide communications/elinks for non-system users
<input checked="" type="checkbox"/>	Letters - add templates
<input checked="" type="checkbox"/>	Letters - delete templates
<input type="checkbox"/>	Sytem E-mail templates - administer
<input type="checkbox"/>	Sytem E-mail templates - view
<input type="checkbox"/>	View all stored communication history
<input type="checkbox"/>	View stored communication history for my reqs only

 When **“System e-mail templates – administer”** is checked, **“System e-mail templates – view”** will also be checked and grayed out.
 When **“System e-mail templates – administer”** is unchecked, **“System e-mail templates – view”** will be editable.

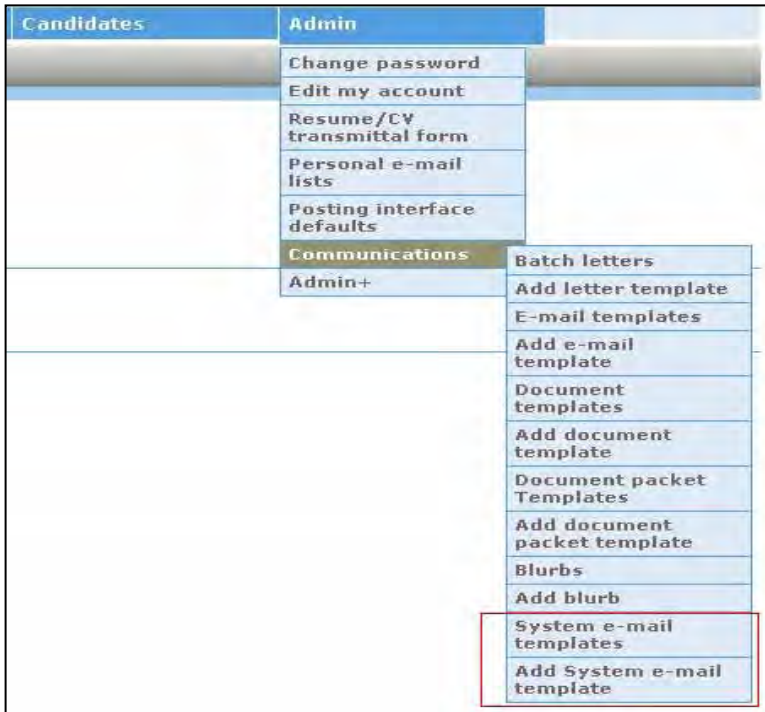
2x BrassRing Admin/Admin+


Who does this: 2x BrassRing Administrator

New type of email templates (**“System e-mail Templates”**) are introduced in the Admin” section of 2x BrassRing.

Two new menu items are added to the “Admin” Menu from where you can enable/configure or edit the default text:

- **System e-mail Templates**
- **Add System e-mail Templates**



 Please note that these two menu items appear in 2xB only if:

- **System e-mail Template**
 - Client Setting is turned **ON**.
 - Logged in 2xB user has atleast one of the privilagees to View and administer **System e-mail Templates**
- **Add System e-mail Template**
 - Client Setting is turned **ON**.
 - Logged in 2xB user has the privilagees to administer **System e-mail Templates**

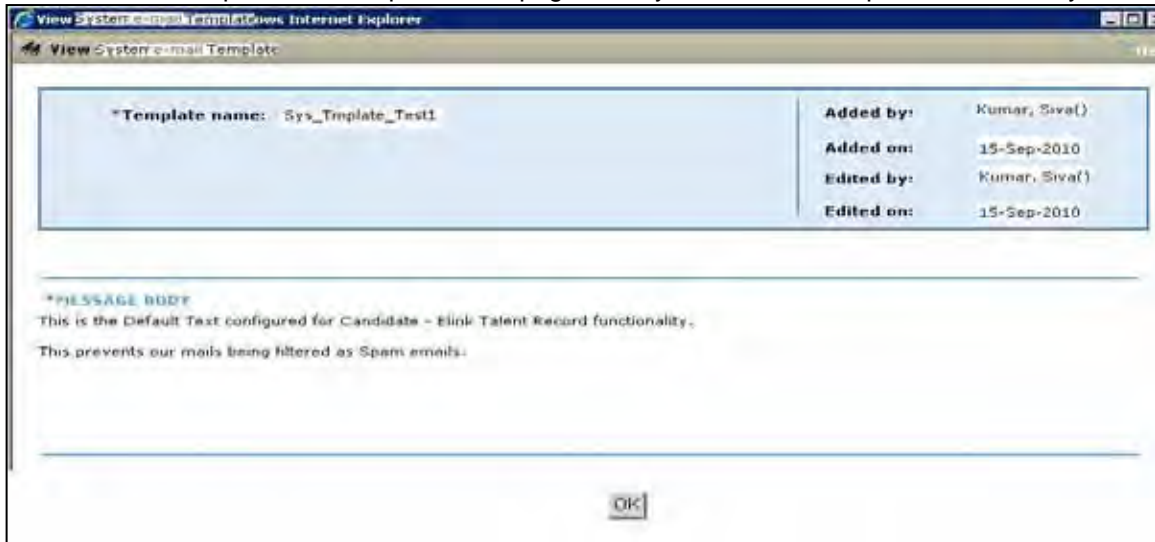
System E-mail Templates

1. Click the menu item **System e-mail Templates** to display a listings page of all the system email templates.

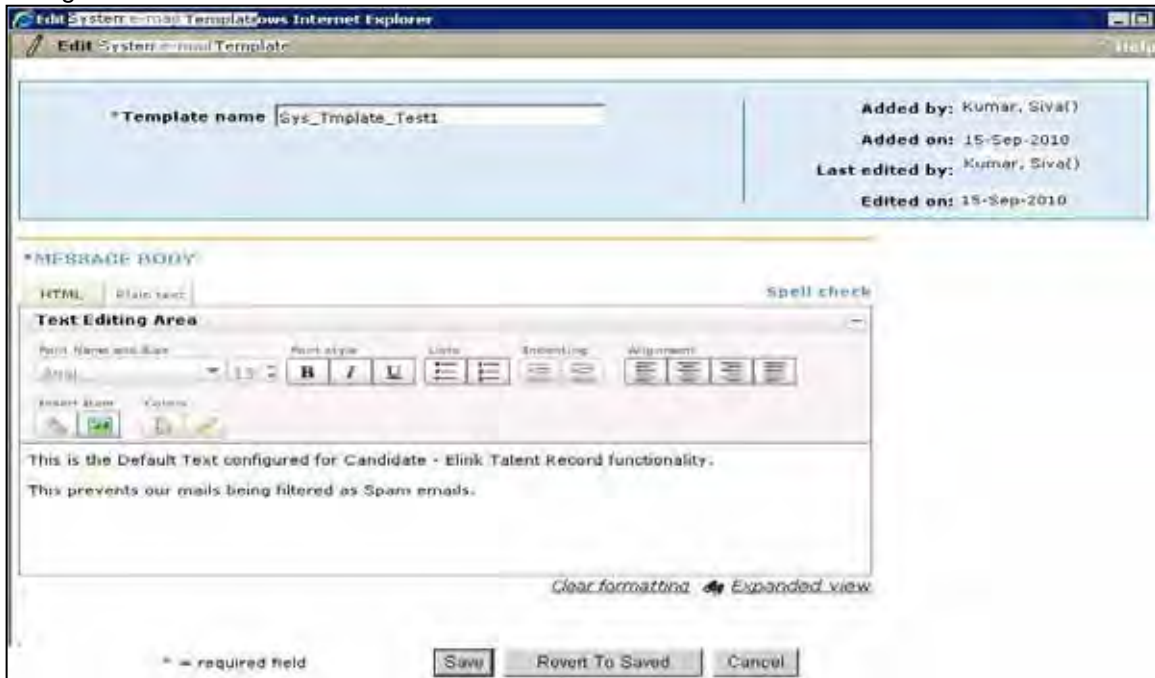


From this page administrators can view, edit, deactivate, and delete the Templates.

- Click the View template icon to open a new page with system e-mail Template in Read-only format.



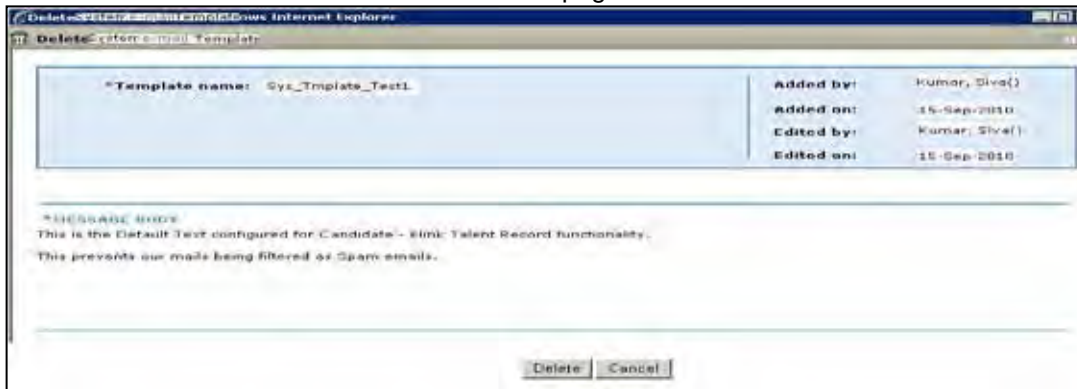
- Click **OK** to close the pop up.
- Click the Edit icon to open a new page that has the System e-mail Template in Edit mode. You can make changes here.



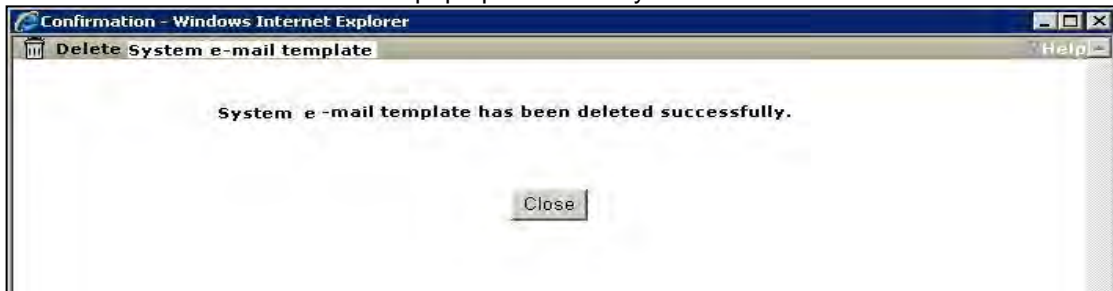
- Click **Save** to update the database with changes. Clicking on **Revert To Saved** button will discard any changes made and displays previously saved content.
- Click on the **Deactivate** icon to deactivate the **System e-mail Template**. A pop up will ask you to confirm your action. Click **OK** to confirm the Deactivation of **System e-mail Template**. Clicking **Cancel** will take no action and leave user on the same page.




7. Clicking on Delete icon will pop up a new page, which shows the system e-mail template in read-only with Delete and Cancel buttons at the bottom of the page.



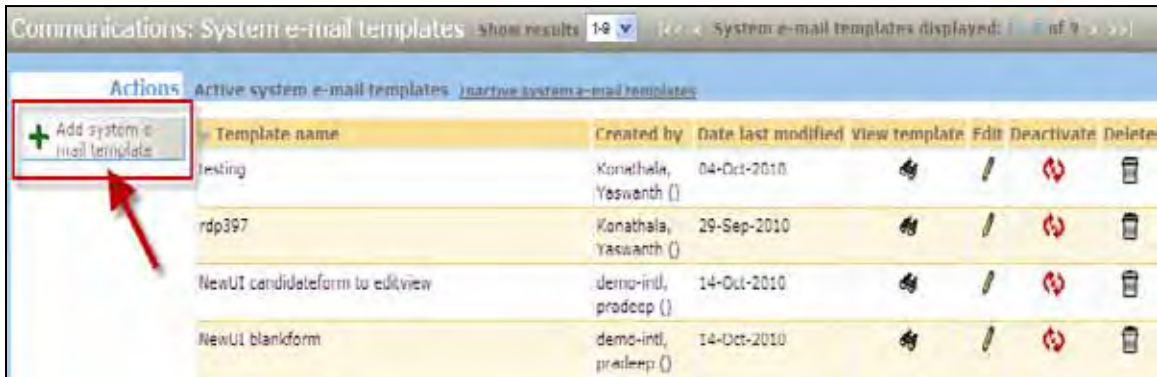
8. Click the Delete button to delete the System e-mail template and redirects to the confirmation page. Clicking on the Cancel button will close the pop up with out any delete action.



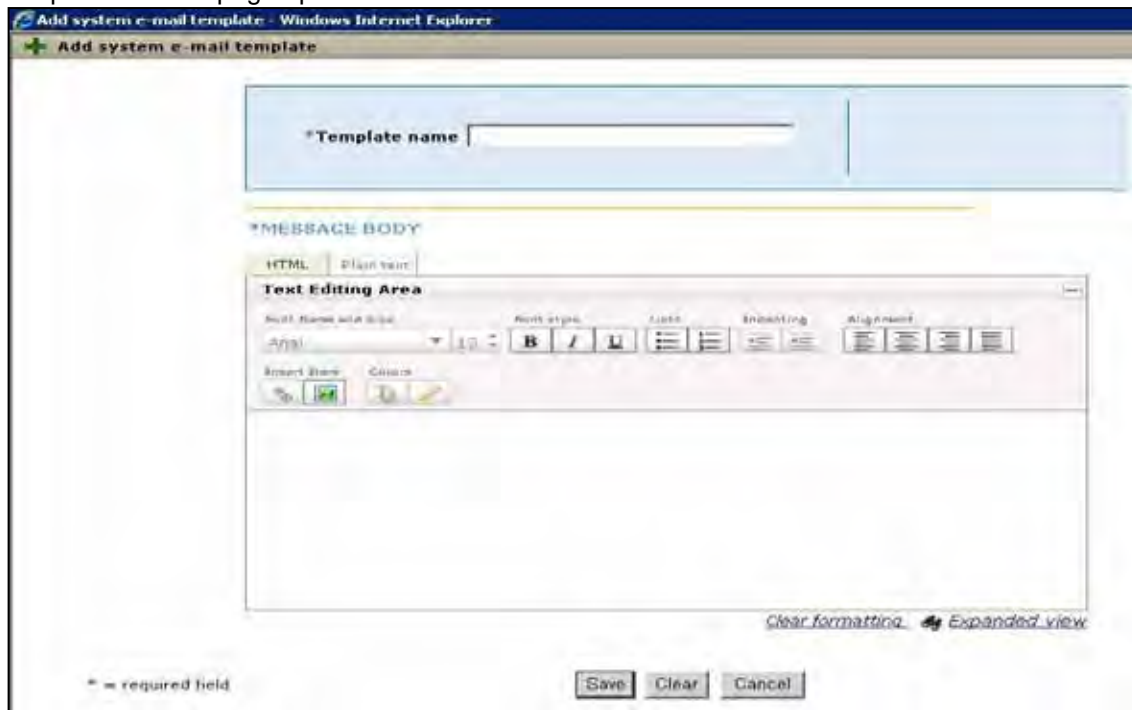


2xB users cannot deactivate and delete system e-mail templates if they are configured for one or more e-mail types. In such cases the confirmation page displays a warning message.

Add System e-mail Template



1. Click on the **Add System e-mail Template** from the Admin > Communications menu or click **Add System e-mail Template** under the Action menu from the System e-mail Templates page. The system email template creation page opens.



2. Type in the Template name and Default text under Message Body. These two fields are compulsory.
3. Click the **Save** button to save the contents as an e-mail template type, **"System"**. Clicking on **Clear** button, clears the fields and clicking on **Cancel** button closes the pop up with out any action.

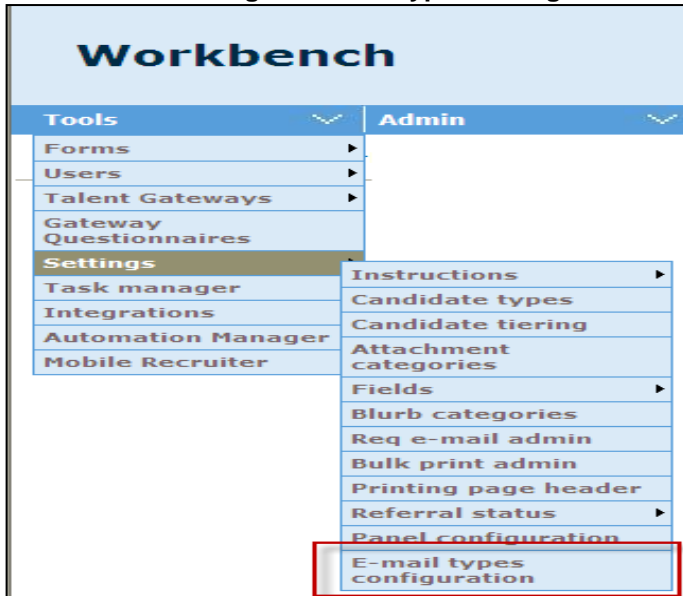


After you create a **"System e-mail template"**, it needs to be mapped to the corresponding e-mail type in the Workbench.

Mapping System Email Template to Email Type in Workbench

Who does this: Certified Workbench Users Tier 0 and above.

1. Click **Tools > Settings > E-mail Types Configuration**.



2. If the client setting is turned OFF, it displays a message **“This client is not configured to use E-mail type configuration”** Else the user will see a list of all e-mail types. (See image below)

Actions ▶ **E-mail type configuration**

E-mail type	View	Edit
Candidate - eLink blank form		
Candidate - eLink form to view/edit/approve		
Candidate - eLink Talent Record		

3. From this page the user will be able to **View** and **Edit** the e-mail Types

View - displays the existing configurations in Read-Only mode with OK button. Clicking on preview button, will show the preview of the system e-mail template.



Edit - displays the Client Purchased Locales and available **System e-mail templates**. User can do new configurations/edit existing configurations and save it.

Client Locale	System E-mail template	
English - United States	German ->Elink talent record	Preview
Danish - Denmark	None	Preview
Dutch - Netherlands	None	Preview
Dutch - Netherlands (informal)	None	Preview

Save Revert to Saved Cancel

Clicking on preview button, will show the preview of the system e-mail template.

Preview system e-mail template [Candidate - eLink form to view/edit/approve]

this is the default text created for RDp 397--edited

Close

2x BrassRing User

Who does this: 2x BrassRing User(s).

Once the mapping is done in Workbench, users with privileges to send eLinks will follow the steps below.

1. Users will open any of the supported eLink page

Subject eLink re: reqID: 633BR: LB Asses

Your message

* = required field

Send Clear Cancel

2. User selects/enters all the required fields.
3. User may or may not enter any text in “Your message” field.
4. Click **Send** button to send the eLink with the default text.



To remove the **Default text** while sending an “eLink Blank Form,” go to “**Edit e-mail type configuration**” screen and select “None” in all select boxes. Click “Save” button. This action will remove all the configurations of the selected **eLink Type**.

Communications – Today’s Date Merge Token

A locale-sensitive “today’s date” merge token is available for use in communications, including document, email and letter templates, and blurbs.

Product	<ul style="list-style-type: none">▫ 2x BrassRing▫ New UI▫ Workbench Self-Service▫ Talent Gateways	<ul style="list-style-type: none">▫ Agency Manager▫ Data Insight Tool▫ SmartApproval▫ Other
Visible Changes	<ul style="list-style-type: none">▫ No – contact your CSC for implementation details.▫ Yes – see the <i>Visible Changes</i> document sent out for each release build.	
How do I get this feature?	<ul style="list-style-type: none">▫ Automatic – see details below.▫ Specific conditions required – see details below.▫ Configuration required – see details below.	

Feature Description

A locale-sensitive “today’s date” merge token is available for use in 2xB communications. The new token, called **Today’s date**, is in a new merge field group called **System Information**. 2xB administrators can make the token available to users who create documents, email, and letters by adding the new token to:

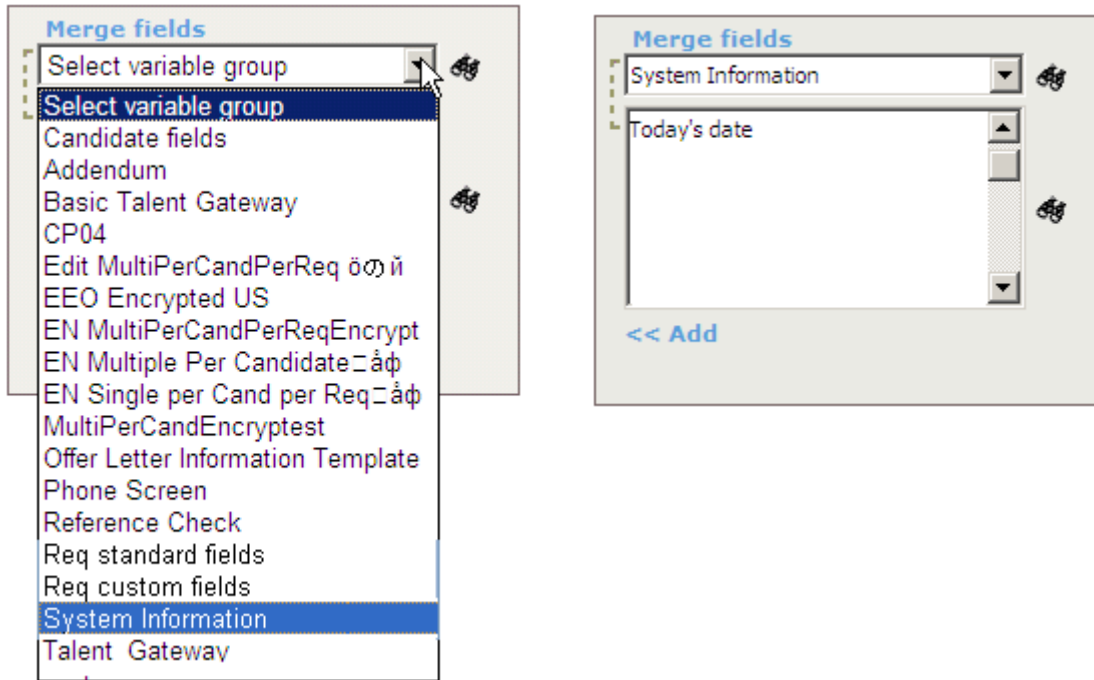
- Document templates
- Blurbs
- Email templates

Administrators also have the new **Today’s date** token available when adding or editing:

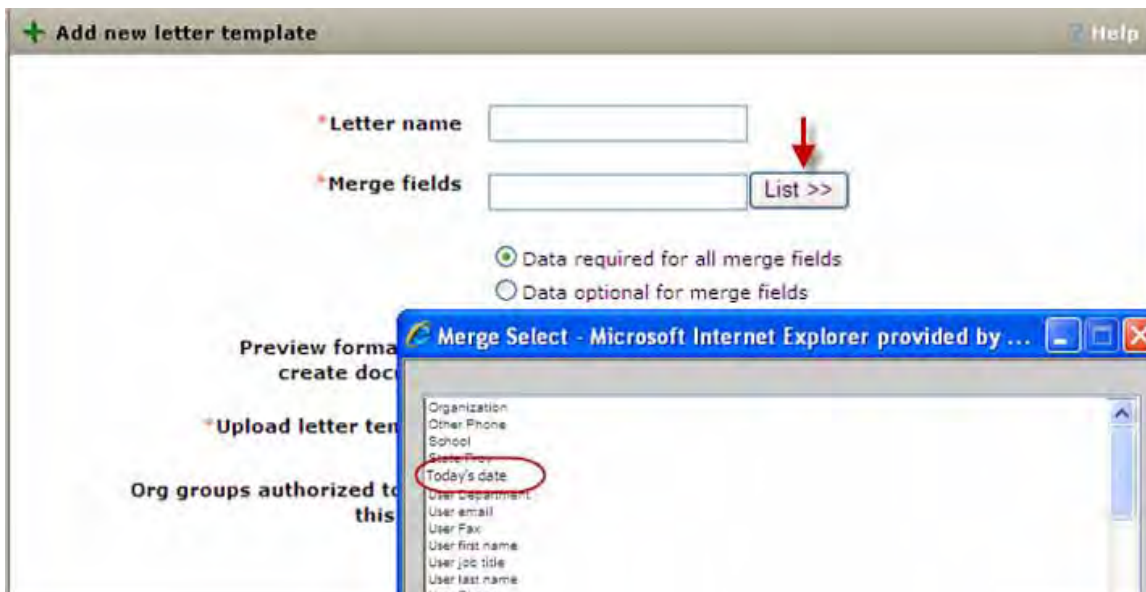
- Letter templates

New token as it appears for adding or editing document and email templates and blurbs in 2xB:

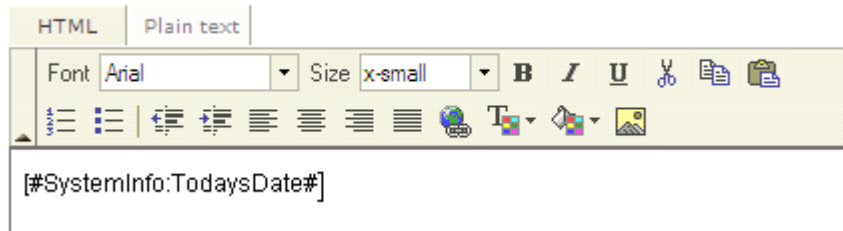
- **Admin > Communications > Add/Edit document template**
- **Admin > Communications > Add/Edit email template**
- **Admin > Communications > Add/Edit blurbs**



New token as it appears for letter templates in **Admin > Communications > Add/Edit letter template**



New token as it appears to users within a template



Recruiter Experience

The Today's date field automatically uses the date that the create "communication" (document or email) action is taken. "Today's" date is determined from the user's browser. For example, if a US user sends a communication at 11pm Monday April 12th and a British user sends a communication at the very same time (which is +5 hrs ahead in England), then the US communications would show Monday April 12th, and the British communications would show Tuesday April 13th.

The candidate's locale is used for the merged token/field.

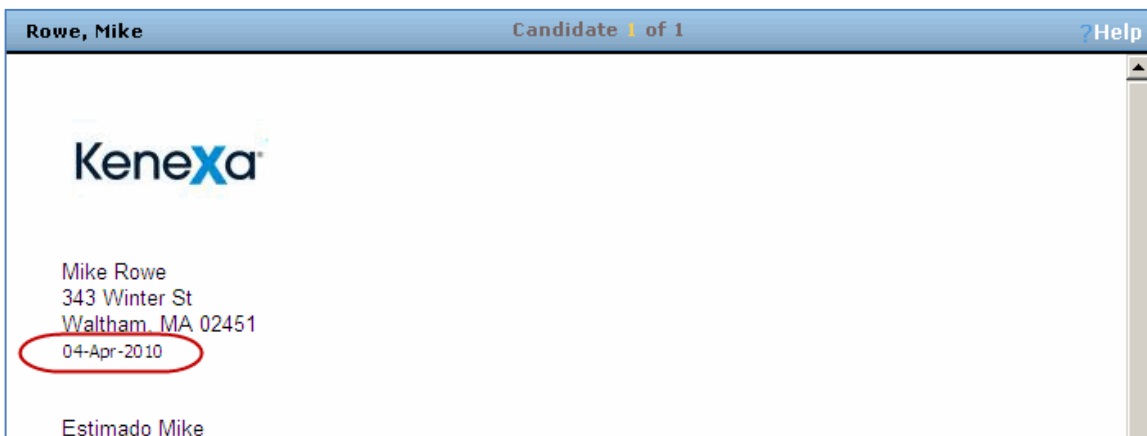
Date Formats

Most locales use the international date format dd-MMM-yyyy (07-Oct-2009), with the following exceptions:

- U.S. English locale is MMMM d, yyyy (October 7, 2009).
- Japanese and Traditional Chinese use the format yyyy-MM-dd (2009-Oct-07).
- Canadian French is d month yyyy (7 octobre 2009). Users creating templates and blurbs in Canadian French must add the definite article ("Le" or "le" depending on context) before the date merge token in their templates. The Communications Module can't determine when "le" should be uppercase or lowercase, so the date merge token does not include the definite article.

Create Document

A 2xB user can create a document from the document template via the **Create Document** action item in the Req folder. There is no need to merge this field as it automatically uses the date that the action was taken. When a user clicks on the **Preview** button, the field is present as shown in the following figure, with the date of the action, "today's" date.

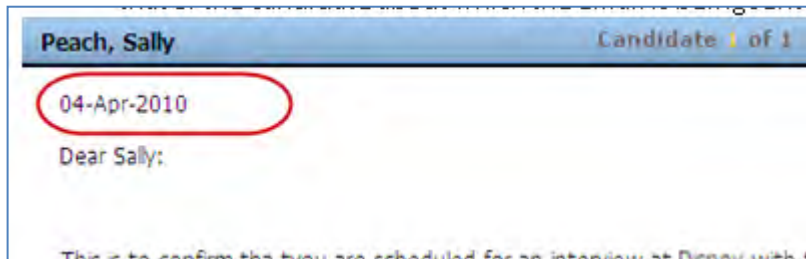


- Date form and locale of the field in the document is based on the candidate's locale
- Uses existing font, style, size

When a user clicks **Save as PDF**, the field will be present as shown above, with the date that the action was taken.

Send Communication: Email

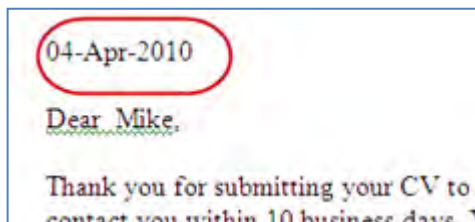
When using the **Send communication** action in a Req folder or Talent Record and selecting email, users see the field token included within the message body. There is no need to merge this field as it automatically uses the date that the action was taken. When a user clicks on the **Preview** button, the field is present as shown in the following figure, with the date of the action, “today’s” date.



- Date form and locale of the field in the document is based on the candidate's locale
- Uses existing font, style, size
- When a recruiter sends an email to an agency contact, the date format/locale for [TodaysDate] is that of the candidate about whom the email is being sent

Send Communication: Letter

When using the **Send communication** action in a Req folder or Talent Record and selecting letter, the field is present as shown below. There is no need to merge this field as it automatically uses the date that the action was taken. When a user clicks on the **Preview** button, the field is present as shown in the following figure, with the date of the action, “today’s” date.



- Date form and locale of the field in the letter is based on the candidate's locale
- Uses existing font, style, size

Limitations and Known Issues

For Canadian French: Users creating templates and blurbs in Canadian French must add the definite article “Le” (capitalized) or “le” (not capitalized) to the letter or document, as appropriate. The date merge token does not include the definite article.

How Do Clients Get this Feature?

This feature is available for use in templates (added via **2xB > Admin > Communications**) automatically without configuration.

Data Insight Tool – Data Timestamp Options

Data Insight Tool users can select from three data timestamps, for running reports with more up-to-date data.

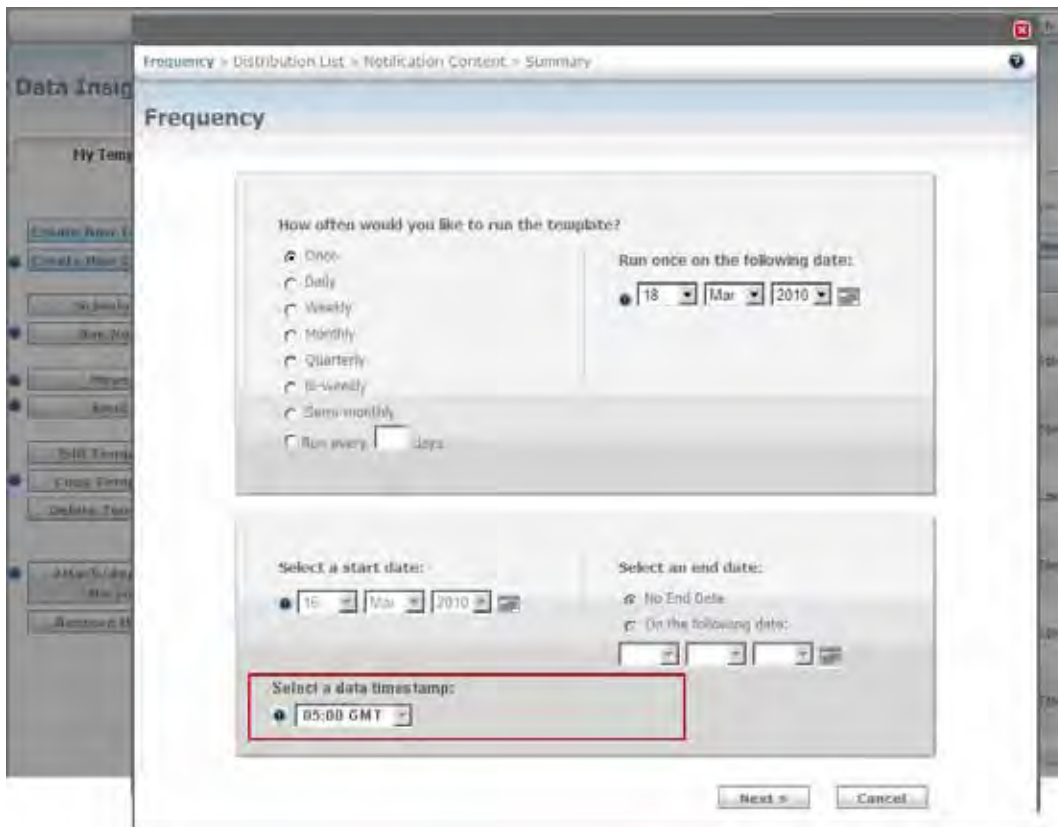
Product	<input checked="" type="checkbox"/> 2x BrassRing <input type="checkbox"/> New UI <input type="checkbox"/> Workbench Self-Service <input type="checkbox"/> Talent Gateways	<input type="checkbox"/> Agency Manager <input checked="" type="checkbox"/> Data Insight Tool <input type="checkbox"/> SmartApproval <input type="checkbox"/> Other
Visible Changes	<input type="checkbox"/> No – contact your CSC for implementation details. <input checked="" type="checkbox"/> Yes – see the <i>Visible Changes</i> document sent out for each release build.	
How do I get this feature?	<input checked="" type="checkbox"/> Automatic – see details below. <input type="checkbox"/> Specific conditions required – see details below. <input type="checkbox"/> Configuration required – see details below.	

Benefits

Users can see more recent data in their Data Insight reports.

Feature Description

Data Insight Tool template creators can select from three data timestamps for scheduling reports. A timestamp is the time the data refresh begins, and scheduled jobs begin about two hours later, once the refresh is complete. When scheduling templates, users will see a new “Data timestamp” field on the Frequency page with three options from which to choose.




The following figure shows the three options with some regional equivalents. Timestamps in red are the recommended optimal selections for each region.

Data timestamp	Eastern (GMT -5)	London (GMT)	Amsterdam (GMT +1)	Hong Kong (GMT +8)	Pacific US (GMT -8)
05:00 GMT	Midnight	5:00AM	6:00AM	1:00PM	9:00PM
13:00 GMT	8:00AM	1:00PM	2:00PM	9:00PM	5:00AM
21:00 GMT	4:00PM	9:00PM	10:00PM	5:00AM	1:00PM

Existing scheduled jobs are assigned **05:00 GMT** as the default data timestamp. Users can schedule or edit their scheduled templates to select the timestamp that will give them the most recent data.

To select or edit a data timestamp in Data Insight Tool > Manage Templates:

- To set the frequency for a template, on the My Template Library tab, select a template and click **Schedule** –OR–. To edit the frequency for a scheduled job, on the My Scheduled Jobs tab, select a template and click **Edit Schedule**



When scheduling templates, the user can schedule to start on “today’s” date for a timestamp that occurs in the future. However, the user will receive an error when attempting to schedule a template to start today for a timestamp that has already occurred today. For example:

- at 09:00 GMT, Data Insight user creates/edits a template and selects the 21:00 timestamp to start today. Data Insight saves this and queues it for the next time the transform occurs, tonight at 21:00.
- at 09:00 GMT, Data Insight user creates/edits another template and selects the 05:00 GMT timestamp to start today. User gets an error, since that transform has already been run today. User must select a date in the future.

- Select one of the timestamp options, make any other desired changes and save the template.

Examples

Scheduled jobs & ad hoc jobs begin about 2 hrs after refresh is complete.

- User A creates a template and selects the 05:00 GMT timestamp and schedules the job to run daily. About 2AM EST, the jobs will begin. Depending upon the size of the report and the # of overall templates queued for this timestamp, the report will be available after 2AM. Data will be as recent as midnight EST the night before.
- User B creates a template and selects the 21:00 GMT timestamp and schedules the job to run daily. About midnight in Amsterdam, the jobs will begin. Depending upon the size of the report and the # of overall templates queued for this timestamp, the report will be available after midnight. Data will be as recent as 10PM the night before.

When a user runs an adhoc report, it will run against the most current transform available.

- User C in New York, NY, runs an ad hoc template at 2PM EST. The template runs against 13:00 timestamp since that was the last time the data was refreshed.

A job’s timestamp is displayed in hours and minutes in 24-hour format in GMT (HH:MM) on:

- Job Details page (select a template from My Scheduled Jobs tab and click **View Job Details**).
- Email notifications that are sent to report recipients.

Limitations and Known Issues

Templates have a maximum of 12 hours to complete. Users who have reports that take more than 12 hours should edit them to reduce the length of time they take to complete. You can break large reports into parts or request a custom report. If the large report is not modified, it will not be completed in the given timeframe.

- In the rare cases when a job is stopped before completion, it is queued to run from the next timestamp's data refresh (that will begin at the next timestamp time). For example, if the scheduled job cannot complete against the **0500 GMT** refresh, it is queued against the **1300 GMT** refresh.
- In the rare cases where refreshed data is not available for a scheduled template (refresh fails or has not been recreated yet), the job will not run until its next designated timestamp refresh, 24 hours later (if problem has been resolved and data is once again available). For example, a 05:00 template will not be queued to run against a 13:00 or a 21:00 refresh if the 05:00 data does not exist – it runs at 05:00 the next day.

How Do Clients Get this Feature?

This feature is available automatically without configuration.

Data Insight Tool – Report eLink Authentication

For clients who enable eLink authentication in 2x Brassring, now eLinks for Data Insight reports will also be authenticated.

Product	<ul style="list-style-type: none">⌘ 2x BrassRing⋄ Agency Manager⋄ New UI⌘ Data Insight Tool⋄ Workbench Self-Service⋄ SmartApproval⋄ Talent Gateways⋄ Other
Visible Changes	<ul style="list-style-type: none">⋄ No – contact your CSC for implementation details.⌘ Yes – details in <i>Visible Changes</i> document sent for each release build.
How do I get this feature?	<ul style="list-style-type: none">⋄ Automatic – see details below.⋄ Specific conditions required – see details below.⌘ Configuration required – see details below.

Benefits

Data Insight report eLinks can be authenticated for improved security.

Feature Description

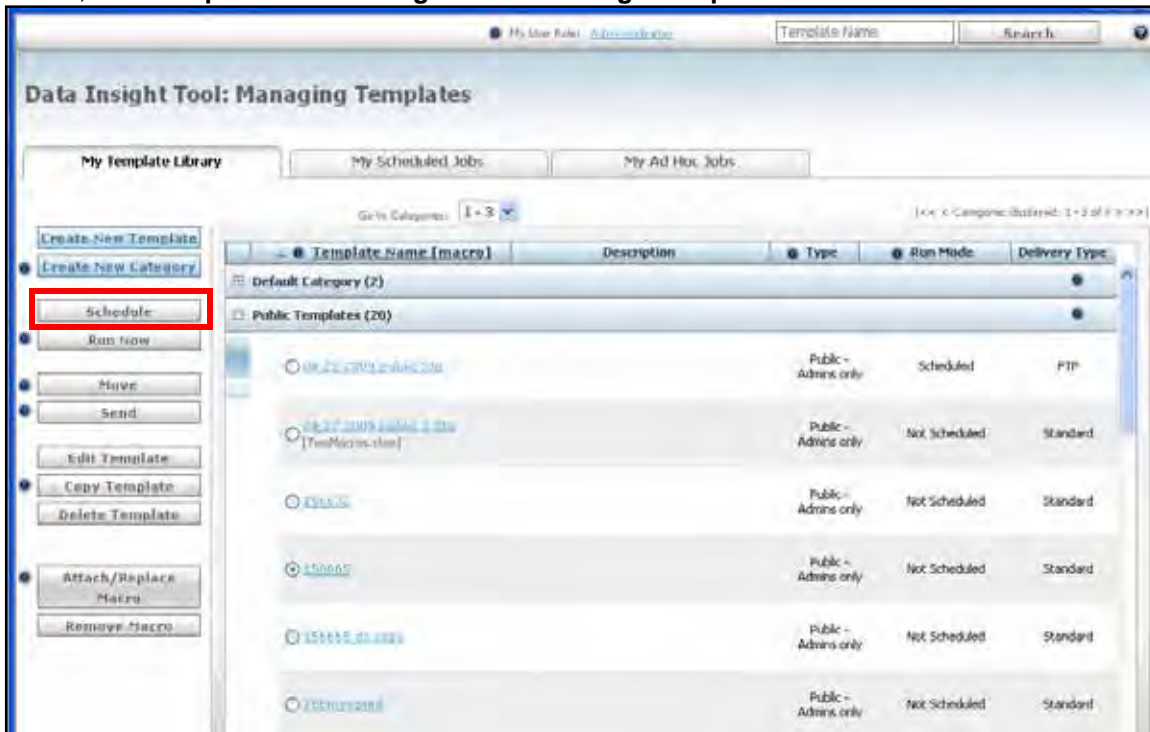
For clients using the eLink authentication feature for 2xB eLinks, now Data Insight report eLinks are also authenticated. Authentication affects the eLinks sent for generated Data Insight reports as follows:

- Users cannot send report eLinks to non-system users. This is pre-existing functionality for 2xB eLink authentication that is now extended to Data Insight Tool eLinks.
- If an eLink is sent to a system user (either logged in or not), when the recipient clicks the eLink or copies and pastes the eLink URL into a browser address bar, eLink authentication starts:
 - If Single Sign-on is enabled, when the user attempts to open the report link, the SSO system validates the user and they are seamlessly presented with the Data Insight report.
 - If Single Sign-on is not enabled, when the user attempts to open the report link, the user is presented with a login page and must enter username and password. Upon successful authentication, the user is presented with the Data Insight report

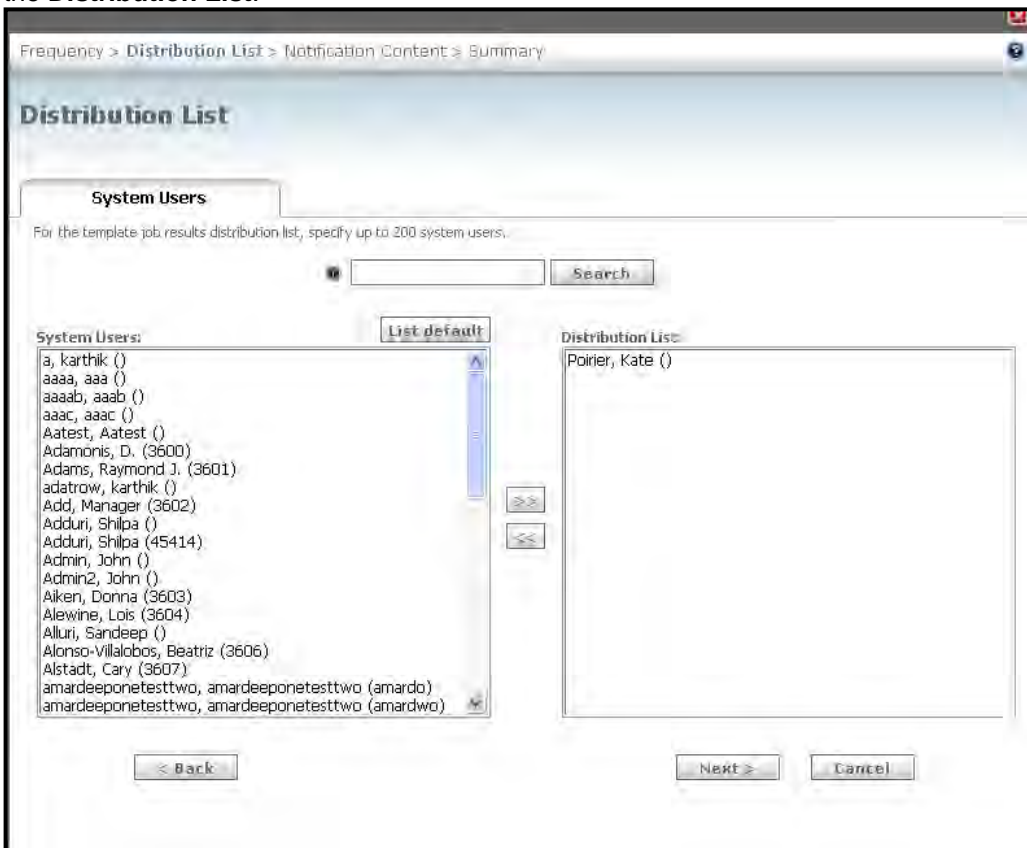
User Experience with Data Insight Template Privileges

Authentication of Data Insight report eLinks takes place for both scheduled templates and ad hoc reports.

1. In 2xB, select **Reports > Data Insight Tool > Manage Templates**.



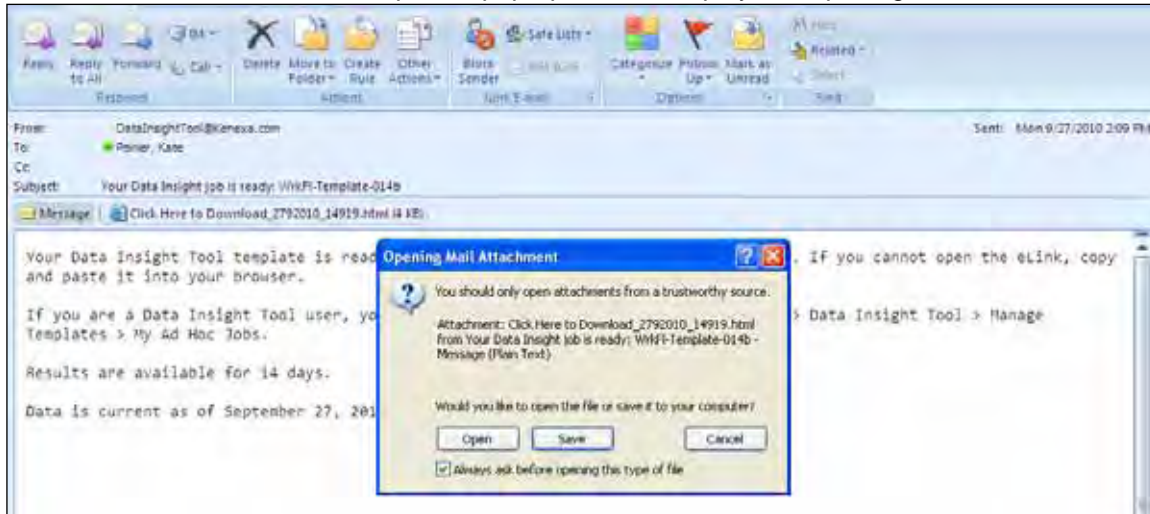
2. Create a new template or select a template on the My Template Library tab, and click **Schedule**, then open the **Distribution List**.



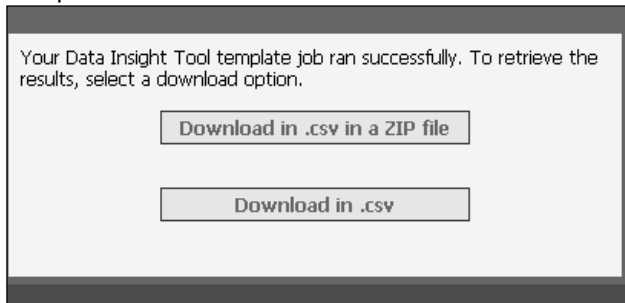
Scheduled report functionality remains the same, but with eLink authentication enabled, the **Non-System Users** tab is hidden. You can select system users only as recipients for either an ad hoc or a scheduled report.

eLink Recipient Experience

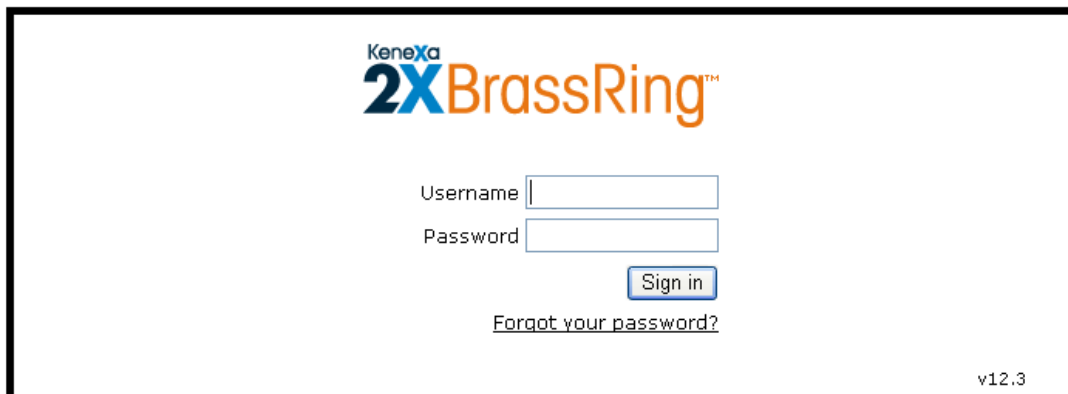
1. 2xB user receives an email from system generated email (DataInsightTool@Kenexa.com) and clicks **Click Here to Download** to view the report. A pop-up window displays for opening the mail attachment.



2. Recipient continues to next screen and chooses a download option for the report file.



3. After selecting the method of download, recipient users who are not logged into 2xB or who aren't using Single Sign-on will be asked for 2xB username and password before they can view the report.



Data Insight Business Rules

Existing Data Insight business rules for report handling still apply:

- Report hyperlink expires after 14 days
- If no data is found for report criteria, the Data Insight standard message is displayed.
- All existing labels are translated

When eLink authentication is not enabled, the report link functionality allows the link to be accessed by all recipients, regardless of whether they have a 2xB user account or whether they were the intended recipient of the report link. The Non-System Users tab for selecting distribution lists when scheduling a report continues to be available.

Limitations and Known Issues

Having the elink authentication client setting enabled for your account ensures that all recipients for elinks will be authenticated by the system, so they must be valid 2xB users.



If you have non-system users in the report distribution list for the scheduled reports, those non-system users will not get the report link. Before elink authentication is enabled for your account (or as soon as possible if it is already enabled), review your Scheduled Report distribution lists for non-system users and remove them so they won't get report emails.

How Do Clients Get this Feature?

This feature is controlled by an existing client setting, **elink Authentication**. Please contact your CSC for more information about enabling this feature if you are not using it already to ensure that 2xB eLinks are authenticated.

Data Insight Tool – Total Candidates in Folder Counts

New **Total Candidates in Folder** output field allows reporting on the quantity of candidates in a Req or working folder, in total or for a given HR Status.

Product	<ul style="list-style-type: none">▣ 2x BrassRing▣ Agency Manager▣ New UI▣ Data Insight Tool▣ Workbench Self-Service▣ SmartApproval▣ Talent Gateways▣ Other
Visible Changes	<ul style="list-style-type: none">▣ No – contact your CSC for implementation details.▣ Yes – see the <i>Visible Changes</i> document sent out for each release build.
How do I get this feature?	<ul style="list-style-type: none">▣ Automatic – see details below.▣ Specific conditions required – see details below.▣ Configuration required – see details below.

Feature Description

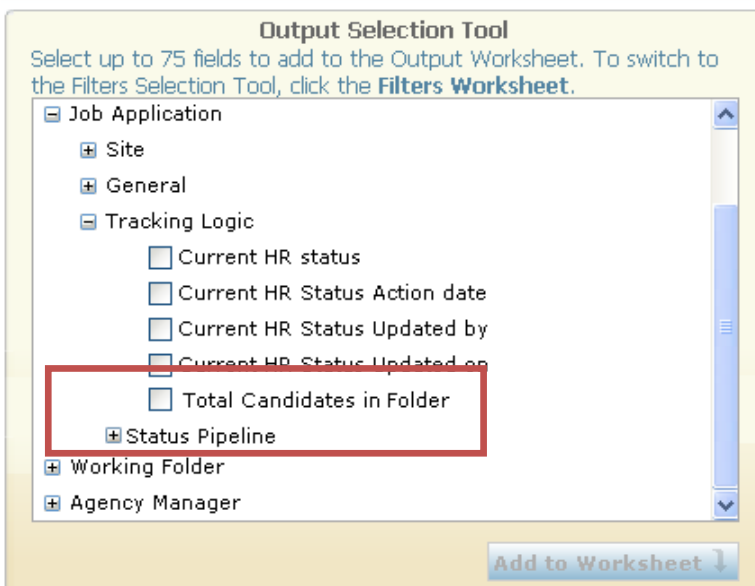
This enhancement provides the ability to report on the number of candidates in a Req or working folder, in total or for a given HR Status. Users with access to manage Data Insight templates can now select the following:

- New output field called **Total Candidates in Folder**
- Additional selection value for each status for “Status Pipeline” called **Count**. Count represents the number of candidates in that status in the Req or working folder.

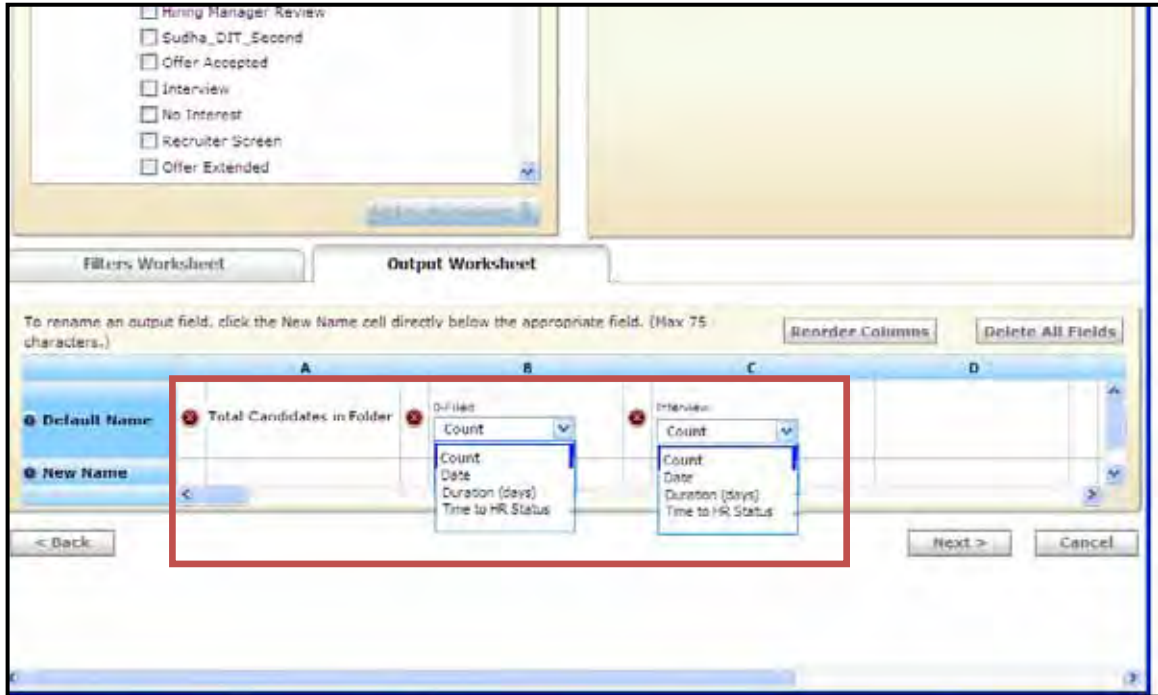
To add the output field:

1. In 2xB, select **Reports > Data Insight Tool > Manage templates**.
2. Select **Create New Template**.
–OR–
Click **Edit Template** for a selected template.
3. Select **Output Worksheet**.
4. Expand **Job Application** section, then expand **Tracking Logic** and select **Total Candidates in Folder** to output the total number of candidates.

Template Workshop



- To also include counts by HR Status, expand **Status Pipeline** and select the statuses for which you want counts.



- Complete and save the worksheet.

The following shows sample data and its sample output when these fields are used.

Sample Data

Req Number	100BR		
Candidates applied to this Req	First Name	Last Name	Current HR Status
1	Samwise	Anji	0-Filed
2	Alwyn	Deminsky	0-Filed
3	Michael	Lofton	0-Filed
4	Sandy	Alion	1st Interview
5	Noreen	Berry	Hired

Req Number	200BR		
Candidates applied to this Req	First Name	Last Name	Current HR Status
1	Eva	Simon	0-Filed
2	Travis	Yu	0-Filed
3	Blaine	Mendel	1st Interview
4	Lily	Santini	1st Interview

Sample Output

Req Number	Location	Total Candidates in Folder	0-Filed	1st Interview	Hired
100BR	Boston	5	3	1	1
200BR	London	4	2	2	0

The following shows sample output when filters are applied and fields from another functional area are selected. Counts are grouped by Requisition Number for Req folders and FolderID for working folders.

Requisition Number	Location	First Name	Last Name	Total Candidates in HR Status	0-Filed	1st Interview
100BR	Boston	Samwise	Anji	5	3	1
100BR	Boston	Alwen	Deminsky	5	3	1
100BR	Boston	Michael	Lofton	5	3	1
200BR	London	Eva	Simon	4	2	2
200BR	London	Travis	Yu	4	2	2

How Do Clients Get this Feature?

This feature is available automatically without configuration. Data Insight template administrators can add the fields to templates as desired.

Document Templates – Page Breaks, Headers, Footers

2xB users can now insert a “hard” page break in a document template to be merged in the final generated document. They can also upload Microsoft Word template files when adding or editing document templates. This allows users who create documents from those templates to take advantage of MS Word’s capabilities for different types of header and footer content.

Product	<ul style="list-style-type: none">▫ 2x BrassRing▫ New UI▫ Workbench Self-Service▫ Talent Gateways	<ul style="list-style-type: none">▫ Agency Manager▫ Data Insight Tool▫ SmartApproval▫ Other
Visible Changes	<ul style="list-style-type: none">▫ No – contact your CSC for implementation details.▫ Yes – see the <i>Visible Changes</i> document sent out for each release build.	
How do I get this feature?	<ul style="list-style-type: none">▫ Automatic – see details below.▫ Specific conditions required – see details below.▫ Configuration required – see details below.	

Benefits

Allows document template creators to use Microsoft Word header/footer features and force page breaks, for more polished document appearance.

Feature Description

In 2xB, users with privileges to create document templates can insert a hard page break in a document template. The break will be merged where desired in the final generated document.

2xB template creators can also upload a Microsoft Word template file when adding or editing document templates. This allows users who create documents from those templates to take advantage of MS Word’s capabilities for different types of header and footer content. This includes layouts such as:

- All pages – same headers on every page of the document, and same footers on every page
- First page - unique header and unique footer on first page, with a different header and/or footer on subsequent pages
- Combinations of the above: for example, unique first page header, different subsequent pages header, same footers throughout document.

MS Word templates also support the following types of objects and text elements in their headers and footers (this list is only of the most typical elements that appear in headers and footers; refer to Microsoft documentation for a complete listing):

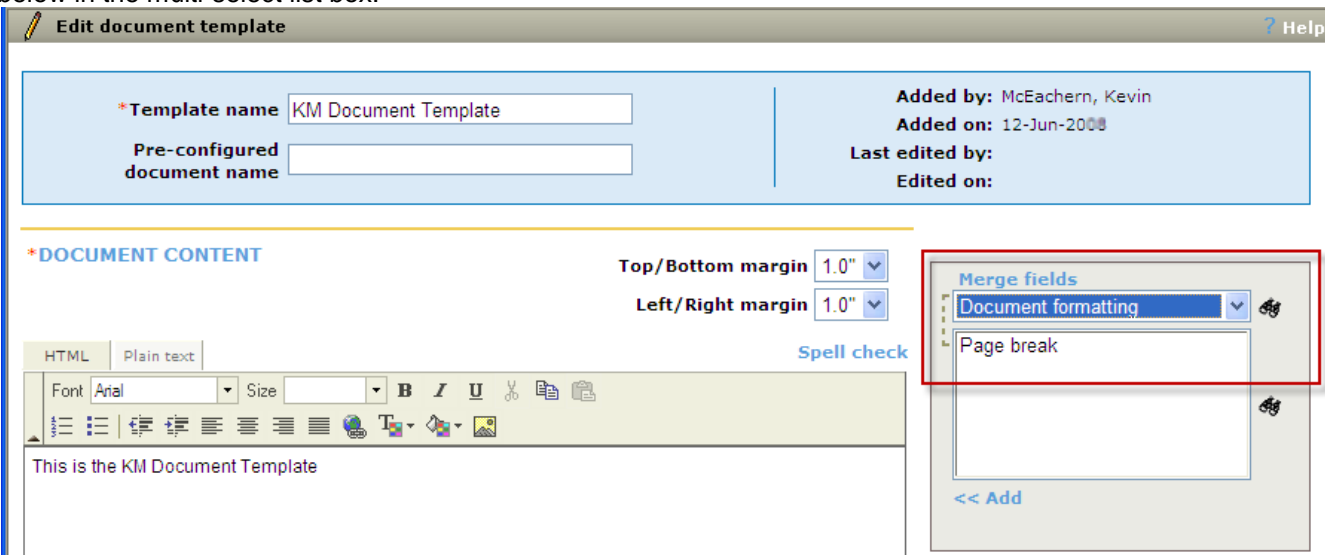
- Small images such as logos.
- Larger images used as banners.
- Stacking of images (i.e., positioning a small image as a layer over top of a larger image).
- Background colors.
- Variable sized text and image areas that can be positioned.
- Text blocks in variable font face, size, color, style, and alignment; for example, an address block that is very tiny; a company name block that is larger.
- Dates
- Page numbers
- Text strings (text can be formatted)

Inserting Page Break Merge Fields in 2xB Document Templates

The Document Generator imposes most page breaks automatically, once a page is filled with content. However, it can support a mixture of automatic and “user-forced” (hard) page breaks, so users can insert hard breaks where desired.

To insert a hard page break in a document template (template administrators):

1. In 2xB **Admin > Communications**, navigate to **Add document template** or **Document templates > Edit** [selected document template].
2. Select **Document formatting** as the merge field variable group. The new “Page break” merge field displays below in the multi-select list box.



3. Position the cursor within the HTML editor window where you want the token inserted, select the **Page break** merge token, and click **Add**. You can also copy and paste the token from where it was inserted to the desired location on the page if necessary.
4. Click **Save**.

The Page Break merge field, when inserted in a Document Template, has the following syntax:

[#Document formatting: Page break#]

It takes precedence over the automatic page breaks applied by the Document Generator when processing documents.

Creating a Document with Page Break Merge Fields in the Document Template

2xB users create documents by selecting the **Create document** action and then selecting a document template. The user can view the template in the HTML editor window of the **Create document** screen, including any page break merge fields that the template contains.

Once the information is correct and complete in the document, the user clicks **Save as PDF**. The Document Generator processes the document and saves it as a PDF on the Attachments tab of the Talent Record. The PDF document contains the hard page breaks inserted in the underlying document template.

Supporting Headers and Footers in Document Templates

When creating a 2xB document template, template administrators can upload a Word template (.dot file) to be applied during document generation. When 2xB users use the Create document action, the Document Generator applies the uploaded Word template before generating the Acrobat PDF file that is saved on the candidate's Attachments tab. The generated PDF document will reflect the header and footer formatting specified in the Word template. It retains the formatting applied to the content of the document within the document template on which the document is based.



To use this functionality, document template administrators must add new 2xB document templates or edit existing ones. Unedited document templates will continue to work the same way they do currently.

Additionally, document template administrators should familiarize themselves with Microsoft Word template creation. For more consistent results, select the same font face, size, and style for the Word template and the 2xB document template.

Template administrators can upload different Word templates for different 2xB document templates, as well as re-use the same one by uploading it to multiple 2xB document templates.

Uploading Word Templates to 2xB Document Templates

To upload on the Add/Edit document template pages:

1. In 2xB **Admin > Communications**, navigate to **Add document template** or **Document templates > Edit** [selected document template].

2. Click **Browse**, navigate to and select the desired .dot file in your local environment. The file name selected populates the text box under the **Upload formatting template (.dot)** label.
3. Click **Upload**. Information about the saved template displays in the File grid below the local upload path.

4. Click **Save**. The document template is added to or updated on the Document templates page.

To delete an uploaded Word template:

Click the **Delete** icon to delete an uploaded Word template if you want to remove the association from your 2xB document template.

Creating Documents: 2xB User Experience

2xB users won't know whether a 2xB document template has a Word template uploaded, so when creating a document will simply select a 2xB template based on their usual business needs.

1. Navigate to the req folder, select a candidate, and click **Create document** in the **Actions** menu.
2. Select a document template. The **Create document** page opens. If the Page Break merge field has been added to the document, it displays to the user as one additional line space.
 - The Document Generator processes the merge fields, blurbs, conditions, as usual
 - You can correct missing information as usual
3. Once the information in the document is correct and complete, click **Save as PDF**.

The Document Generator processes the document, applying the header and footer formatting of the associated Word template (if any), and saves it as a PDF on the Attachments tab of the Talent Record. The PDF document contains any hard page breaks inserted in the underlying document template, and reflects the formatting and layout of the underlying uploaded Word template (if any).

Limitations and Known Issues

This feature does not support .dotx templates (MS Word 2007 format).

How Do Clients Get this Feature?

2xB users who function as 2xB Document template administrators must upload a Word template to new and existing 2xB document templates.

The same users will insert the new Page Break token as needed in new or existing document templates.

Document Templates – Pre-configured Document Names

Document template creators can now pre-configure a document name that populates the **Document name** field for 2xB users creating documents from the template.

Product	<ul style="list-style-type: none">⌘ 2x BrassRing⋄ New UI⌘ Workbench Self-Service⋄ Talent Gateways	<ul style="list-style-type: none">⋄ Agency Manager⋄ Data Insight Tool⋄ SmartApproval⋄ Other
Visible Changes	<ul style="list-style-type: none">⋄ No – contact your CSC for implementation details.⌘ Yes – see the <i>Visible Changes</i> document sent out for each release build.	
How do I get this feature?	<ul style="list-style-type: none">⋄ Automatic – see details below.⌘ Specific conditions required – see details below.⋄ Configuration required – see details below.	

Benefits

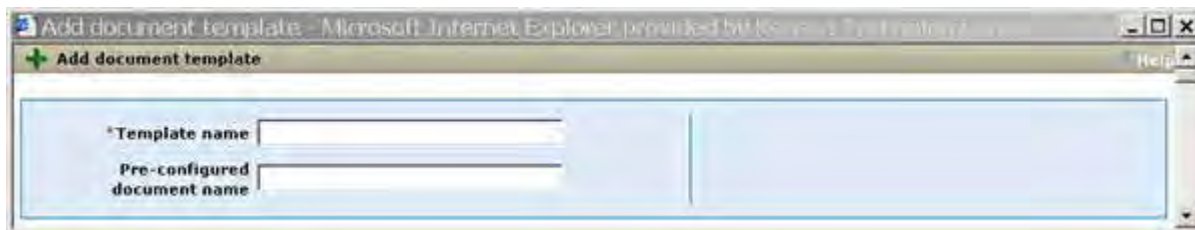
Document name is a required field for users creating documents. This feature provides a way to configure a default name ahead of time that can save users time and helps standardize document names.

Feature Description

Document template administrators can now pre-configure a document name that populates the **Document name** field for 2xB users creating documents from the template. The pre-configured **Document name** is editable on the **Create document** page only for users with the new “Create document – Edit pre-configured document name” user type privilege.

Pre-configuring Document Names

Administrators enter the name in the new **Pre-configured document name** field on the **Add | Edit document template** pages (in 2xB **Admin > Communications**). The new field is also shown on the **View | Delete document template** pages.



This field is not required and does not affect existing document templates. You can continue to create and use document templates as you have done in the past. If you do use it, however, it saves a step for 2xB users creating documents, since **Document name** is a required field for them. Since it is not generally editable, it also helps standardize the document names in use.

The **Pre-configured document name** field accepts up to 250 characters and the following merge tokens. You manually enter the merge tokens, along with any desired free-form text, in any order or combination:

- [#SystemInfo:CurrentTime#] – **new** with this feature. The System Info token represents the time when the document is generated, picked up from the server (Eastern Time) and presented in the format hh:mm:ss (24 hour clock). The token is not included in the merge field list.
- [#Document:TemplateName#] – **new** with this feature, the document template’s **Template name** field token. The token is not included in the merge field list.
- [#Contact-info:FirstName#] – Candidate field token for candidate’s first name
- [#Contact-info:LastName#] – Candidate field token for candidate’s last name

- [#RequisitionStd:AutoReqId#] . This token may have a customized name. If your organization uses ‘Optional Req ID’ and not ‘AutoReqID’, the token is resolved to the value for the Optional Req ID.
- [#SystemInfo:TodaysDate#] – System Information token for today’s date. The date is calculated based on the time picked up from the server (Eastern Time).

The following is an example of the syntax for the **Pre-configured document name** field:

[#Contact-info:LastName#][#Contact-info:FirstName#]_ [#RequisitionStd:AutoReqId#]_ [#SystemInfo:TodaysDate#]_ [#SystemInfo:CurrentTime#]_ [#Document:TemplateName#]

The underscore characters (_) used as separators are included for readability but are optional. (Due to size constraints of the editable area of the field, you may not be able to see the entire pre-configured document name if it is longer than the editable area.)

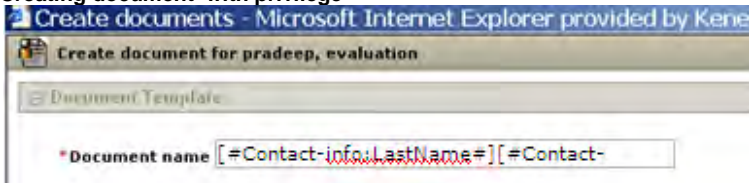
Creating Documents with Pre-configured Document Names

When 2xB users create a document for one or more candidate, the pre-configured document name populates the Document name field. For example:

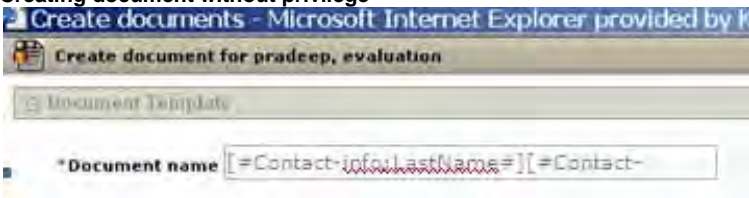


When the **Pre-configured document name** field is used on the **Add document template** or **Edit document template** pages, the **Document name** field on the **Create document** field can only be edited by users with the “Create document – Edit pre-configured document name” user type privilege.

Creating document with privilege



Creating document without privilege



When the two tokens [#SystemInfo:TodaysDate#] and [#SystemInfo:CurrentTime#] are included in the “Pre-configured document name” field, the date/time stamp in the generated document name in the **File** column is the same as the date/time stamp in the **Date added** column of the grid on the **Attachments** tab of the Talent Record.

Document Templates – Setting Paper Sizes

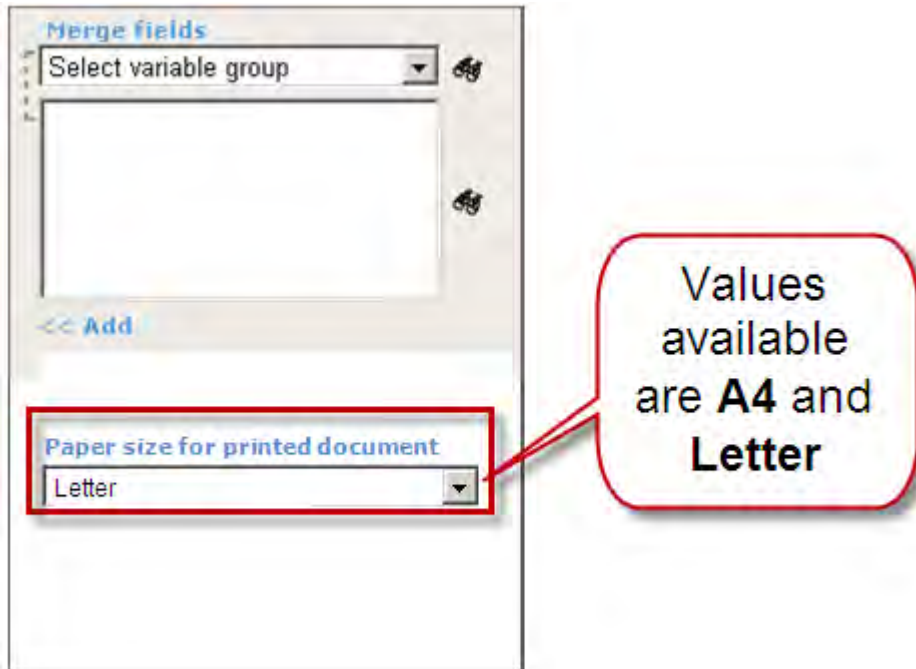
Users who create document templates can set the paper size for printed documents to A4 or Letter.

Product	<ul style="list-style-type: none">▫ 2x BrassRing▫ New UI▫ Workbench Self-Service▫ Talent Gateways	<ul style="list-style-type: none">▫ Agency Manager▫ Data Insight Tool▫ SmartApproval▫ Other
Visible Changes	<ul style="list-style-type: none">▫ No – contact your CSC for implementation details.▫ Yes – see the <i>Visible Changes</i> document sent out for each release build.	
How do I get this feature?	<ul style="list-style-type: none">▫ Automatic – see details below.▫ Specific conditions required – see details below.▫ Configuration required – see details below.	

Feature Description

In 2xB, users with privileges to create document templates can select the paper size for the printed document on the **Add | Edit document template** pages.

1. In 2xB **Admin > Communications**, navigate to **Add document template** or **Document templates > Edit** [selected document template].
2. Select either 'A4' or 'Letter'



3. Complete or set other fields and options and click **Save**.

Selected paper size will appear on the **View | Delete document template** pages.

*Template name: Apply Word Template	Added by: Smith, Leslie ()
Pre-configured document name	Added on: 30-Jun-2010
	Edited by: Smith, Leslie ()
	Edited on: 17-Sep-2010


***DOCUMENT CONTENT**

Top/Bottom margin 0.5
Left/Right margin 1.5
Paper size for printed document A4

Either A4 or Letter displays for 'Paper size for printed document', depending on what was selected and saved for the template.

OR

Paper size for printed document Letter

 Changing the paper size for a document can affect line wraps and page breaks, thereby changing the page's layout.

How Do Clients Get this Feature?

This feature is available automatically without configuration for template administrators to use.

Event Manager – Interview Scheduling

Event Manager allows organizations to automate Interview scheduling process.

Product	<ul style="list-style-type: none">▫ 2x BrassRing▫ New UI▫ Workbench Self-Service▫ Talent Gateways	<ul style="list-style-type: none">▫ Agency Manager▫ Data Insight Tool▫ SmartApproval▫ Event Manager
Visible Changes	<ul style="list-style-type: none">▫ No – contact your CSC for implementation details.▫ Yes – see the <i>Visible Changes</i> document sent out for each release build.	
How do I get this feature?	<ul style="list-style-type: none">▫ Automatic – see details below.▫ Specific conditions required – see details below.▫ Configuration required – see details below.	

Benefits

Event Manager helps the recruiter create and automate the scheduling process for complex recruiting events, providing a more streamlined event experience for large numbers of candidates at the same time. This automated scheduling capability is particularly powerful for college recruiting and other high-volume recruiting events like opening a new retail or manufacturing location.

Feature Description

Event Manager has the ability to automate interview scheduling process both for recruiters and candidates. Recruiters will be able to organize multiple recurring event activities for multiple candidates and assessors at the same time including interviews, assessments, presentations, lunches, room assignments or any other activity that needs scheduling.

Candidates can now self schedule interviews by selecting their preferred time slots.”

Who uses -- Applicants/candidates and Recruiters

How Do Clients Get this Feature?

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

1. To **ADD** a client name is added in navigator.
2. Go to **Source Admin** à **Add Client** à select a Client from “**Add an Enterprise Client**”, Click **Add client**
3. You can see the added client in “**Configured Enterprise Clients**”

Workbench Self-Service

Who does this: Certified Workbench User

To configure this client setting in Workbench:

1. Login to **Workbench**.
2. Click **Admin** à **Manage Client** à **Client Setting**.
3. Click **Edit Client Setting**.
4. New setting “**Redirect Candidate to Event Manager**” when enabled will redirect the user automatically to Event Manager based on the event attached to the req.

5. Select **Yes** to “Enable Event Manager” redirection. **NO** is selected by default.

PasswordFrequency

Redirect candidate to Event Manager No Yes

Referral eLink expiration clicks (1-99)

Referral eLink expiration time (DD:HH:MM)

6. Event Manger has another setting for existing client “Event Manager URL”, which allows the users to have access to Event Manager.
7. After the users have access to Event Manager the URL needs to be populated.

Event Manager URL

User Type Privileges

8. Go to **Tools** Menu and click **User Types**.
9. Select **User Type** and Click **Edit Type Permissions**.
10. Select **Integration** à **Event Manager** check box.
11. Click **Save**.


2x BrassRing User

Who does this: 2x BrassRing User(s)/Recruiters with the ability to add Req.

Req Configuration:

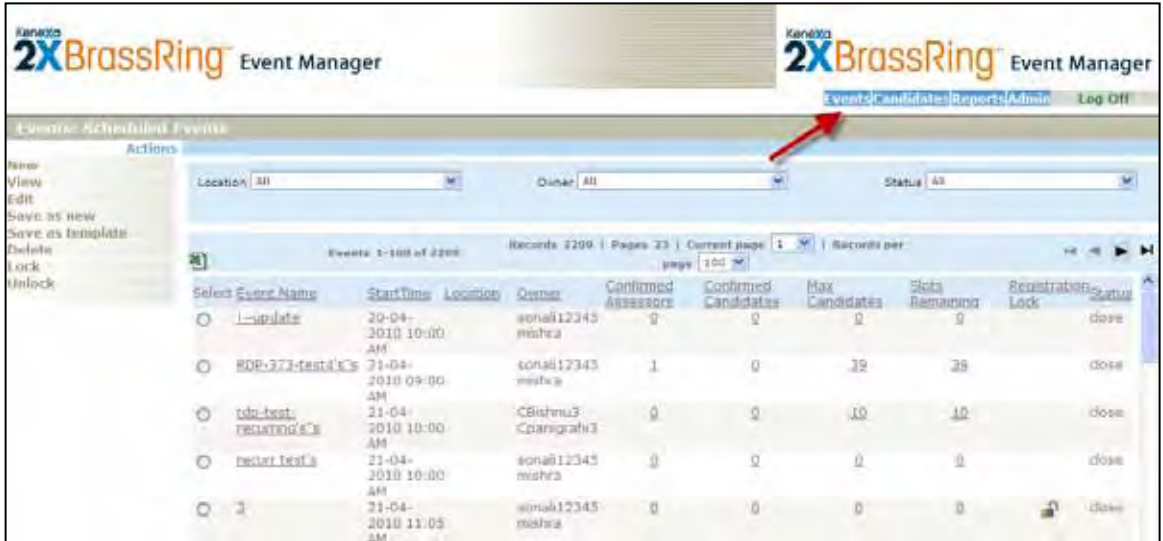
After creating a scheduled event, recurring event in Event Manager with at least one time slot each, Login to 2xB to configure the Req.

1. Click Reqs à Add new Req.
2. The Events custom filed is displayed in the req page.
3. Select the Req form (Which is configured with Event custom req field), job code and click Continue.
4. Scheduled Events are displayed in the Events dropdown.
5. Complete the req as you do normally.
6. Post the req in multiple Talent Gateways with scoring.

 Enable candidates to create a new profile and upload the CV/Resume.

Event Manger – Recruiter Experience

The Scheduled Event List is the first page that a user experiences in Event Manager. It is also the page that recruiters use to manage events. This page presents the appropriate high level event information and gives recruiters the right tools to find their specific events.



Now that we are logged in and ready to Schedule Interviews, let us dedicate some time to learn different Menu functionality.

The Menu is at the right-hand top corner of the screen. (See image 1.)

The different menus available are (depending on user privileges):

- Events
- Candidates
- Reports and
- Admin



Events Menu – Scheduled Events

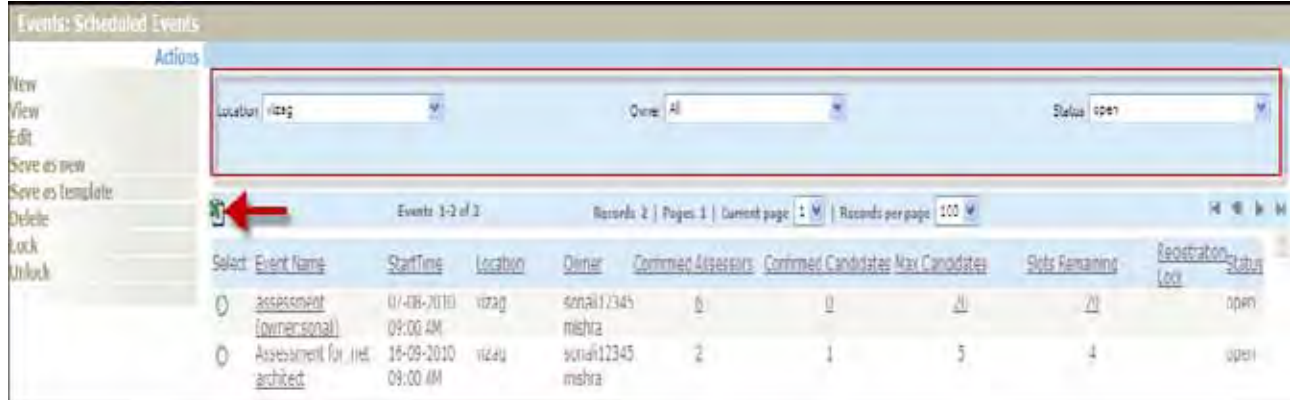


This menu is visible only if the logged in user has the Privilege to access Events.

Click on Events > Scheduled Events to view all the Events that the user is a team member or has access to that particular event.

If the User is a Super user within Event Manager all events for the client will display for the User.

Event Filter:

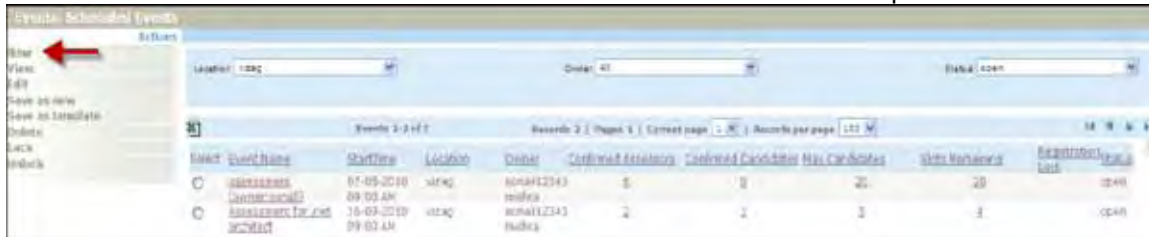


Use the Filter options on top of the page to drill down the list of Events displayed. You will be able to Search by Location, Owner and Status.

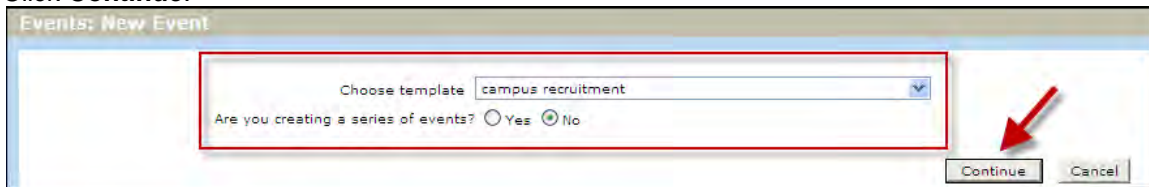
Click the MS-Excel icon to export the Event list to an Excel Spreadsheet.

Add New Event:

1. From the Actions Menu > Click **New** to create a new event based on a Template.



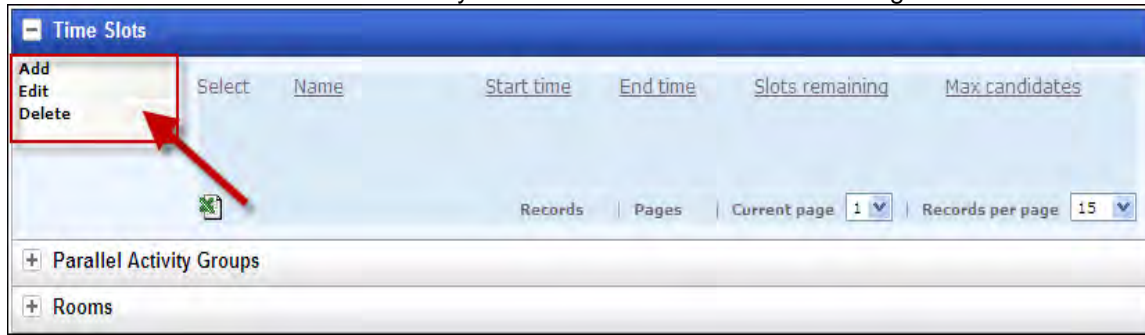
2. Select a Template from the Dropdown menu.
3. Select the appropriate option if you want to create a series of Events.
4. Click **Continue**.



- Type in all the Event details such as Event Name, Status, Event Date, Start and End time.

- Select the Registration Lock period. The dropdown offers 0 to 14 as the number of days prior to event. This will close the Registration process. The default is 0 which means that registration will not be locked. When an option of 1 or higher is selected, registration for the event will be locked that many days prior to the event date.
- You will also be able to upload a branding image for the purpose of this Event.
- Fill all other details.
- Scroll down to the page to add Time slots, Event Activities, etc.. Click the + icon to collapse the Tabs.

- Click Add to add a new time slot. Also you will be able to Edit/Delete existing time slots.



- Enter the time slot details like the slot name, Max candidates accommodated in this slot and start & end time in the pop up window.

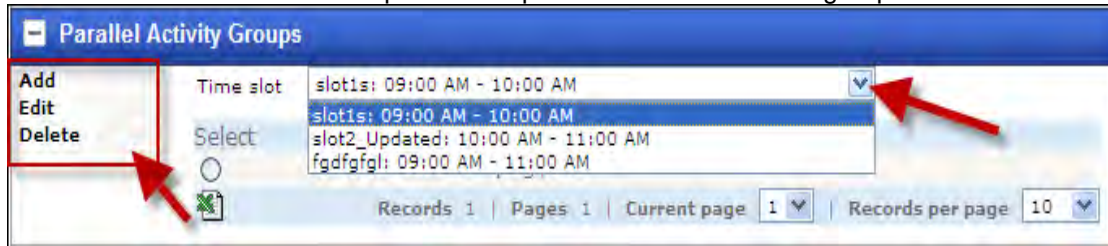
Time slot name

Max candidates

Start time :

End time :

- Clicking Save will save the time Slot and return to the Add Event Page. Clicking Cancel will do no Action.
- Next clicking on the Parallel Activity Group, you will be able to add multiple groups with same activities at a given time slot.
- Select the time slot from the Drop down to update the list of available groups and then Click Add.



- Click Add to add a new Parallel Activity Group. Also you will be able to Edit/Delete existing Groups.
- Enter the Group Name in the Pop up and click Save.

Group name

- Click on Rooms to add rooms for the Event.
- Select a Time slot from the dropdown to see the available Rooms for that time slot.

19. Clicking Add will pop up a window where you can add the details for the new Room.

20. Enter the Room name, Room Capacity, from & to time and select a time slot.

21. Click Save.

22. Click Activities to view available Activities for the Event. You can filter the activities by time slot, by selecting the time slot from the dropdown.

23. Click Add to add a new Activity.

24. From the Pop up window select an activity type and click continue.

Activities are individual sessions that occur during a specific time slot. For example, if there will be 3 different half hour interview sessions occurring during the 10:00 timeslot, then 3 three half hour activities need to be created and added to that timeslot. If you have created an activity template or activity type for re-use, you can select it below

Choose activity type	Select	Name	Description	Duration	Scored
	<input type="checkbox"/>	- No Activity Template -		0	
	<input type="checkbox"/>	a23		30	✓
	<input type="checkbox"/>	a23		30	✓
	<input checked="" type="checkbox"/>	a4000		30	✓
	<input type="checkbox"/>	a56789		30	

Records 35 | Pages 7 | Current page 1 | Records per page 5

Add to time slots: slot1s: 09:00 AM - 10:00 AM, slot2_Updated: 10:00 AM - 11:00 AM, fgdqfql: 09:00 AM - 11:00 AM

Continue Cancel

25. Clicking on Assessors will give a list of all assessors. Select a time slot from the dropdown to filter.

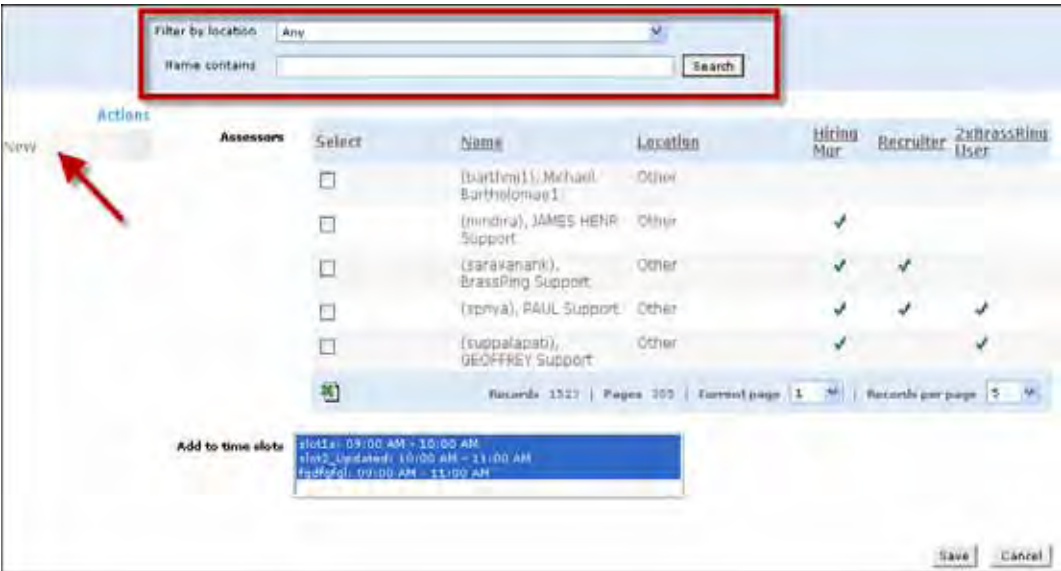
26. Click Add to add an Assessor.

27. Use the Search function to filter/search for assessors.

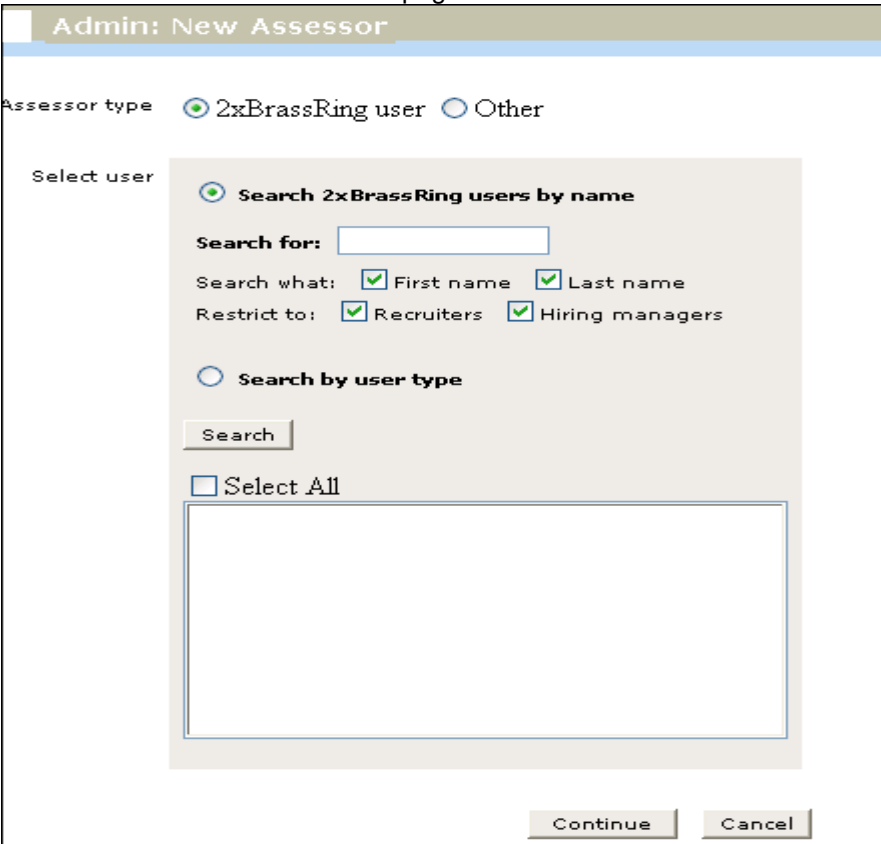
28. Select the Assessor and click Save to add and continue.

29. If you cannot find the Assessor you are looking for, you can add them from here.

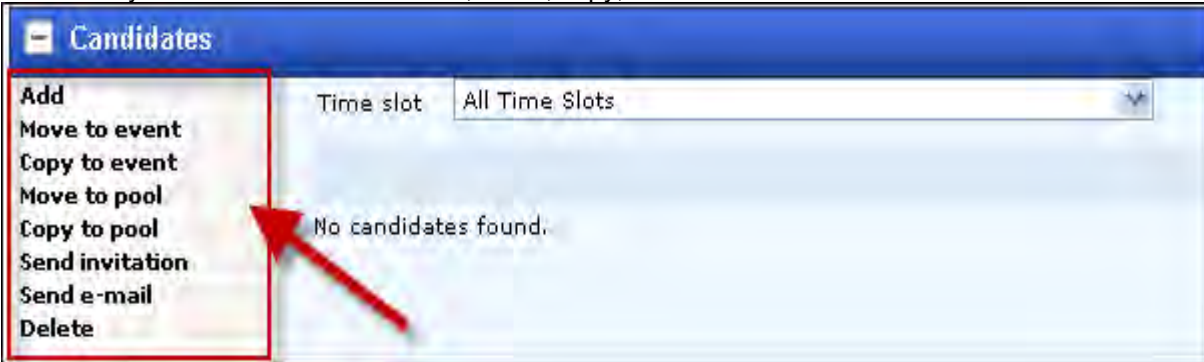
30. Click New under the Actions Menu to add a new Assessor.



31. From the popup window, select the **Assessor type**.
32. You will be able to search **by user name** or **user type** in 2xB.
33. Search results are displayed in the box below.
34. Select the Assessors and click **Continue**.
35. You will be back to the Add Event page.



36. Click Candidates Tab to Add candidates to the event.
37. From here you can add new candidates, move, copy, send invites and e-mails.

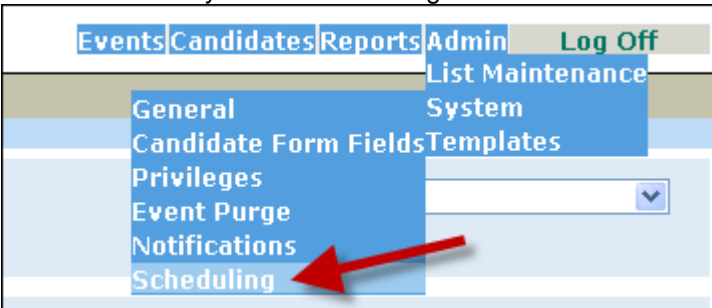


38. Click Attachments tab to add Support files as attachments.
39. Click Event Team tab to add the team member of the Event.
40. Once you are done adding all the details, Click **Save to Single Event** to save the event details.
41. Now you will be able to view **Single Event** and **Finalize Event**.

Registration Lock:

Users may want to be able to lock down registration for events just before the event date to allow time to finalize event logistics such as printing out candidate information & schedules for assessors, ensuring the right number and size of rooms are booked, etc. The registration locking feature allows event owners/event team members to identify the number of days prior to the event that registration should be locked. This can be set on an event by event basis.

1. Go to Admin à System à Scheduling.



2. Enable Candidate Registration Locking by selecting Yes. By default No is selected.

Enable Candidate Registration Locking Yes No
 Allows the ability to prevent candidates from registering for an event a certain number of days prior to the event. It is configurable by event.

Default Registration Page: Temp1
 This is the default registration page settings for all new events and new event templates.

Enable Remote Event Location option: Yes No
 Allows the ability to set the Event Location field to Remote.

Default Time Zone: (GMT+08:00) Kuala Lumpur, Singapore.
 This is the default setting for the default time zone of an event when Remote is selected as the Event Location.

Enable "Unscheduled" candidate time slot: Yes No
 Allows candidates to be moved or copied to events without assigning a specific time slot.

Default Event Start Time: 10 : 15
 This value will be used when creating new events.

Default event length: 3 hours M.
 This value will be used when creating new events.

3. Click **Save**.
4. A new parameter Lock registration dropdown for the days prior to event date is displayed on event configuration page. Lock registration dropdown offers option 0 to 14 as a number of days prior to the Event. By default Zero is selected

Event Template

Event name:

Status: Please Select

Event date: (YYYY-MM-DD)

Start time: 10 : 15 AM

End time: 01 : 15 PM

Slots remaining: 0 (total from time slots)

Lock Registration: 0 days prior to the event date

Branding image: Browse...

Candidate Registration Page: select

Event visibility: team only everyone

0
1
2
3
4
5
6
7
8
9
10
11
12
13
14

5. Lock button is also available under Actions Menu in the Scheduled Events page.


Actions

- View
- Edit
- Save as Draft
- Save as Inactive
- Delete
- Lock
- UnLock

Event Name	Date	Location	Certs	Confirmed Candidates	Max Candidates	Slots Remaining	Registration Status
Event 1	2009-10-09 09:45 AM	mal112345	0	0	0	0	close
Event 2	2009-10-09 09:45 AM	CBufeu3	0	0	0	0	close
Event 3	2010-04-21 10:00 AM	CBufeu3	1	1	35	35	close
Event 4	2010-04-21	CBufeu3	0	0	10	10	close

6. Select the Event Radio button and click Lock for the Actions Menu to Lock Registration.

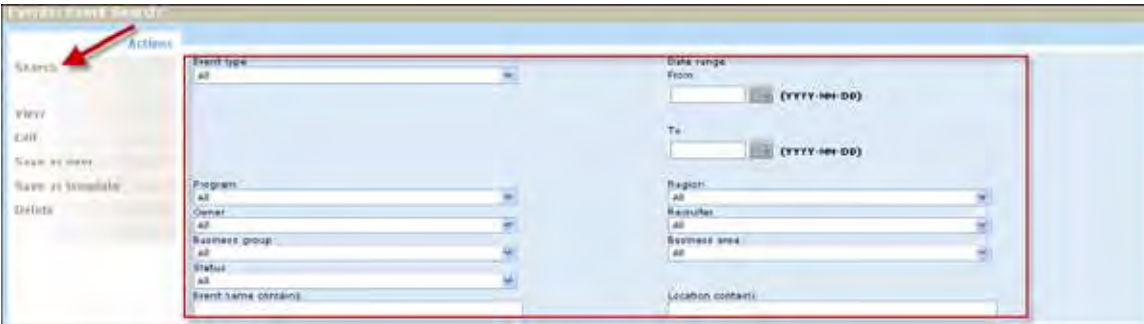
7. To unlock registration, Select the Event radio button and click Unlock.

 An alert message **“This Event is locked for registration”** is displayed when the candidate tried to register re-register, cancel registration for locked Event.

Events Menu – Event Search

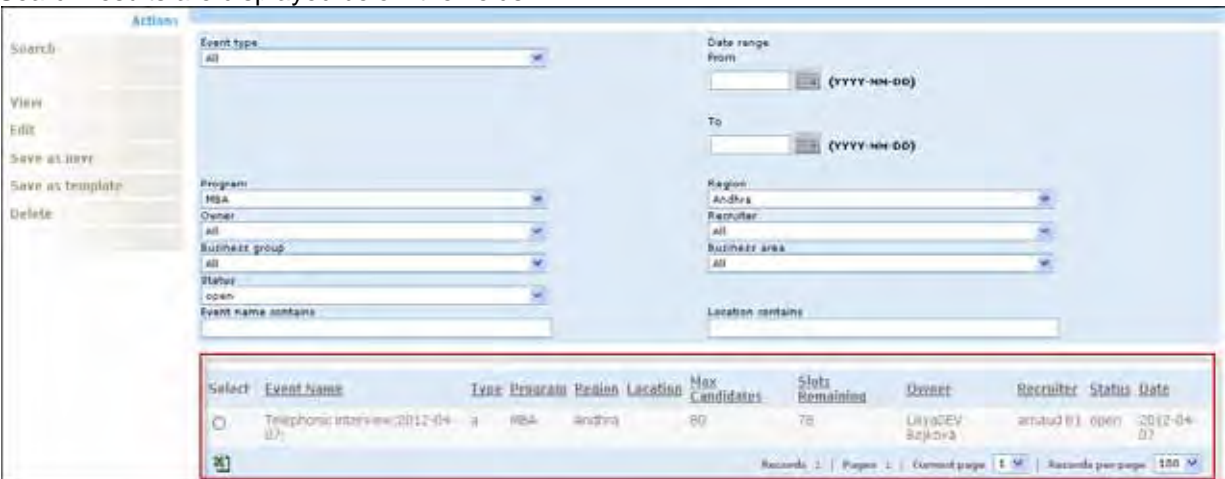
From the Event Search menu users will be able to perform advanced search based on Event type, Date, region, event status, etc.

1. Go to Events menu à Event Search.



2. Enter search criteria and Click Search button under Actions Menu.

3. Search results are displayed below the fields.



4. There are a variety of tasks you can perform with the search results.

- Export the search results to Excel.
- View.
- Edit.
- Save it as new Event.
- Save as Template.
- Delete.
-

Candidates Menu – Candidate Management

There a lot of improvements done to candidate usability. Event Manager Candidate Search now has the ability to search candidates within the 2xB by Req folder or/by HR Status.

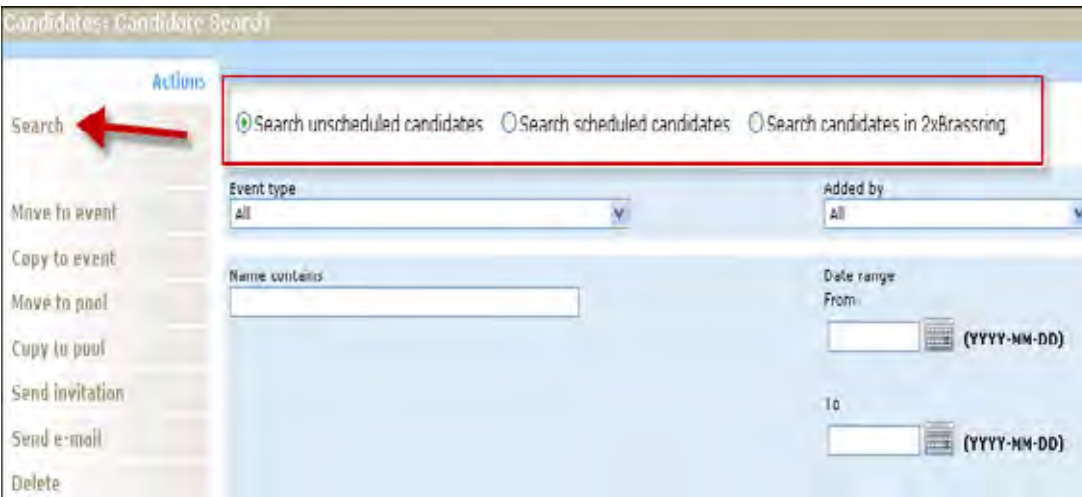
Now Candidates can be pulled from 2xB into Event Manager directly.

Candidate Search:

1. Go to Candidates Menu and Click Candidate Search.



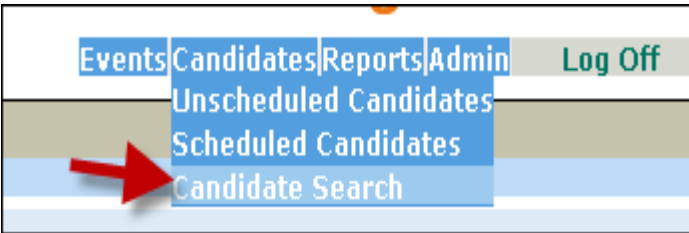
2. You will be taken to the Candidate Search page, where you have three radio buttons.
 - **Search Scheduled Candidates** – Shows candidates that are scheduled for an interview in Event Manager.
 - **Search Unscheduled Candidates** – shows candidates that are not schedules for Interview in Event Manager.
 - **Search Candidates in 2x BrassRing** – Searches candidate that are in 2xB.



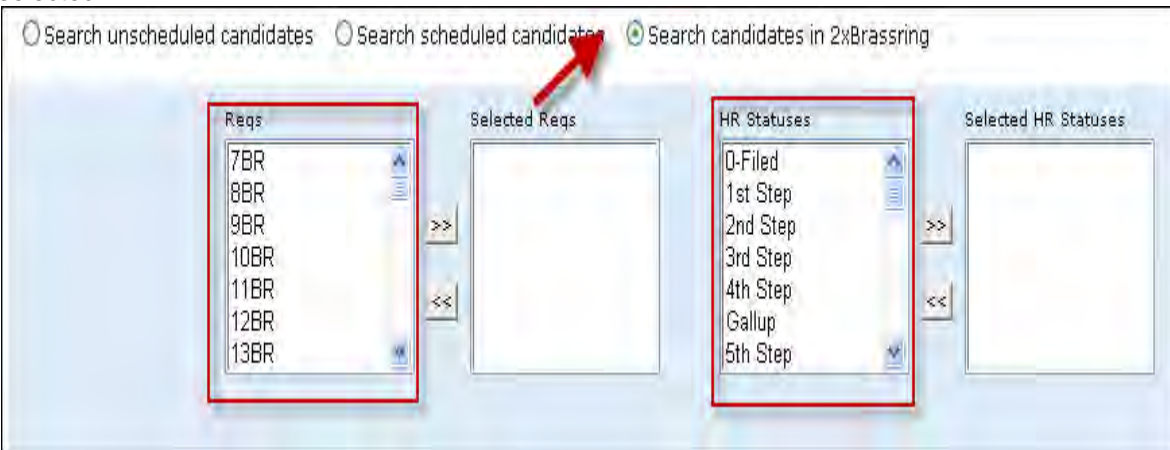
3. Select the type of search you want to perform by selecting a radio button.
4. Also you can use the search filter below the radio buttons to narrow the search results.
5. Click the Search button.

Search candidates in 2xB

1. Go to Candidates Menu and Click Candidate Search.



2. You will be taken to the Candidate Search page, where you have three radio buttons.
3. Select "Search Candidates in 2x BrassRing" radio button.
4. Reqs and HR Statuses filter criteria are displayed when 'Search candidates in 2xBrassRing' radio option is selected.



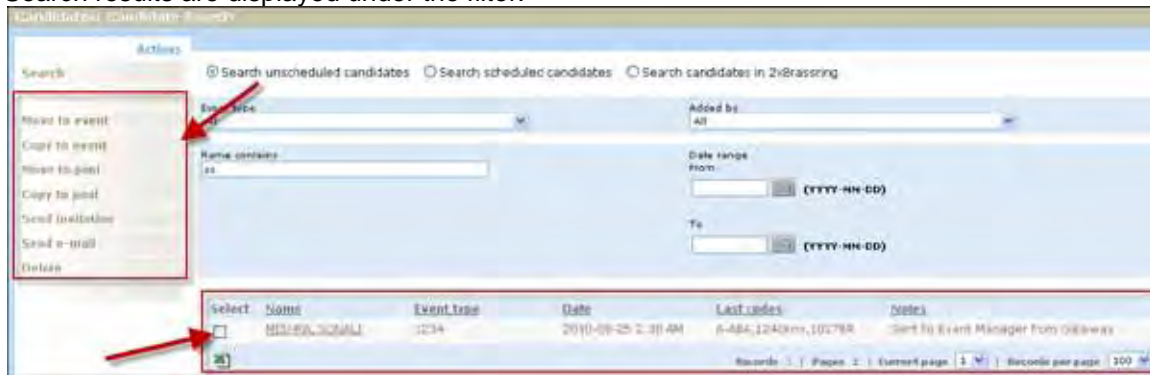
5. Select the desired Reqs and Click >> button. Then the selected reqs are moved to selected req list.
6. Users can deselect undesired reqs from selected reqs list by clicking << button.
7. You can do the same as above to select and deselect **HR Statuses**.
8. Click Search button.



- **Invited to an Event** column is displayed in candidate Search result table.
- **Invited to an Event** column has a **Green Tick** mark, when the candidate is already invited for an Event from Event Manager.
- If **Invited to an Event** column is empty, then the candidate is not invited for any event in Event Manager.

Moving Candidates from Search Results :

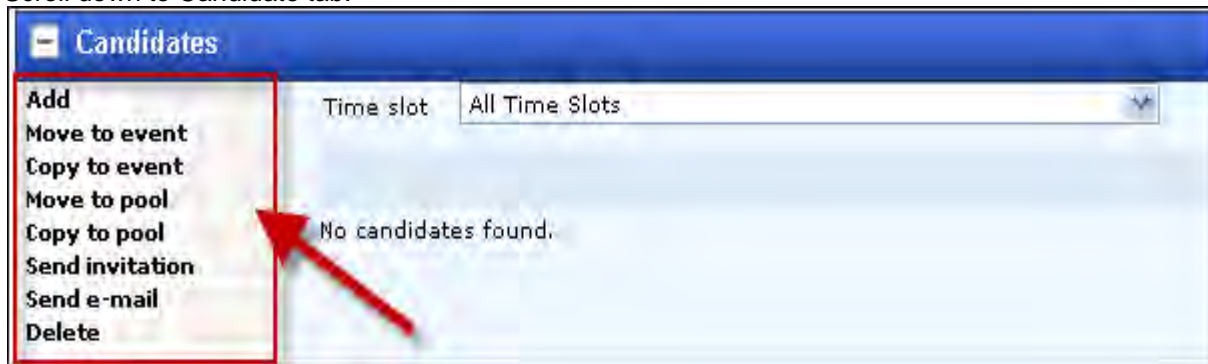
1. Search results are displayed under the filter.



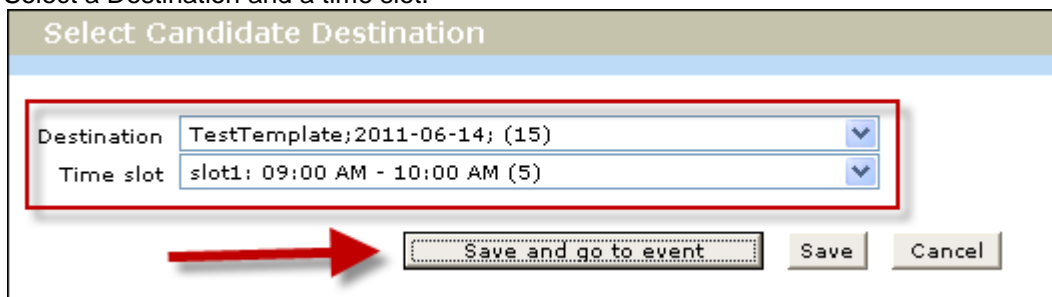
2. Candidates from the search results can be Moved/Copied to an Event/ Pool by clicking on the button from the Action Menu.
3. You can select the candidates by clicking on the tick box.
4. Users can also send **Event Invitations** and **e-mails** to selected candidates.
5. Clicking on the **Delete** button from the Actions Menu will delete the Candidates from Event Manager.

Candidates Tab in Event Configuration :

1. Go to Event Menu à Scheduled Events.
2. Click New from Actions menu to create a New Event.
3. Scroll down to Candidate tab.



4. Clicking Add brings the user to the Candidate Search page.
5. Search for Scheduled, Unscheduled and 2xB candidates.
6. You will be able to move/copy candidates to the Event.
7. Select a Destination and a time slot.



8. Click **Save and got to Event** button to return to Event Page.
9. You can send an Event Invitation/e-mail from here.

- Invited column is displayed in the candidate tab. This column has a green tick mark if the candidate is invited for the series of this Event.

Candidate Invitation Flow

To send an Event Invite:

- Go to Candidates Menu à Scheduled candidates/ Unscheduled candidates/ Candidate search, select a candidate and click on send invitation button from action menu.
- Select a message template for Invitation from the drop down.

- Select the Event you want the invite the Candidate to.
- Select if you want to Move/Copy Candidate upon registration.
- Click “Edit Message” hyperlink to edit the message.
- Select the option for “Send before Event” from the drop down.
- Click Save.

Interview schedule Tab in 2x BrassRing

Launch both Event Manager and 2xB

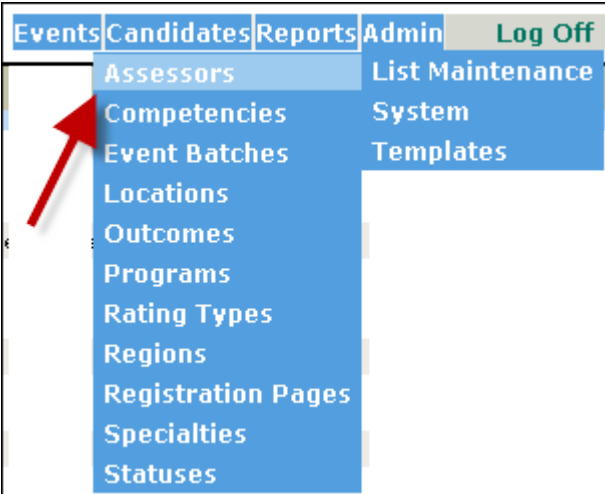
- In the Pre-registration page select a candidate to send an invitation for an Event.
- Select a time slot and register for the Event and switch to 2xB and navigate to Interview schedule Tab for the Talent Record.
- Event name is displayed under the “**Considered for**” column of the talent Record.
- Other info like Event Name, Start time and duration is displayed.
- The **Scheduled by** column contains Event Manger link.
- Clicking on the link launches Event Manager in a Pop up.

System Configuration

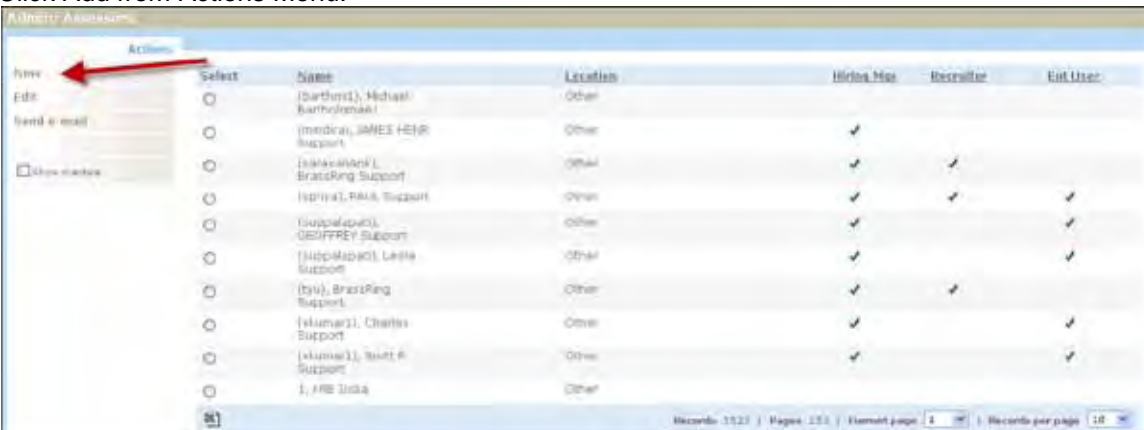
Adding Assessors:

To add Assessors

1. Click Admin à List maintenance à Assessors.



2. Lists of all available Assessors are shown in this page.
3. Click Add from Actions Menu.



4. Select the assessor type radio button.

Admin: New Assessor

Assessor type 2xBrassRing user Other

Select user

Search 2xBrassRing users by name

Search for:

Search what: First name Last name

Restrict to: Recruiters Hiring managers

Search by user type

Select All

5. You can search users from 2xB and import them.
6. Select Other if you want to create users from scratch.
7. Click Continue.
8. In the new page Enter the assessor name, e-mail address, Location and time zone.
9. Select the tick box to make the new assessor active.

10. Click **Save**.

Admin: New Assessor

Assessor name

E-mail

Location Other

Default Time Zone (GMT+08:00) Kuala Lumpur, Singapore.

Preferred language English

Active

Specialties

Add

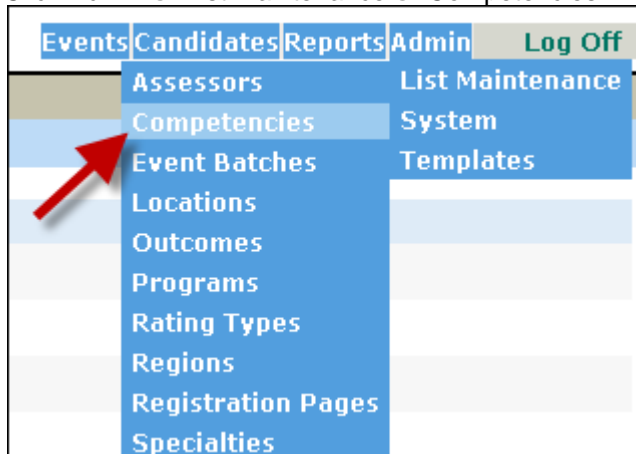
Delete

No specialties found.

Adding Competencies:

To add Competencies

1. Click Admin à List maintenance à Competencies.



2. Lists of all available Competencies are shown in this page.

3. Click Add from Actions Menu.

Name	Select	Name	Active	Rating Type	Description
Competency 1	<input type="radio"/>	competency 1	<input checked="" type="checkbox"/>	rating1	test
test	<input type="radio"/>	test	<input checked="" type="checkbox"/>	good	this is the first one.
fluency	<input type="radio"/>	fluency	<input checked="" type="checkbox"/>	good	
Personality test	<input type="radio"/>	Personality test	<input checked="" type="checkbox"/>	personality	
time limit	<input type="radio"/>	time limit	<input checked="" type="checkbox"/>	good	This competency is related to time management.

Records: 1 | Pages: 1 | Current page: 1 | Records per page: 10

4. Enter Competency Name, Description, and Rating Type.
5. Click the check box to make the Competency Active.

Admin: New Competency

Competency name

Description

Rating type ABO rating type

Active

6. Click Save to continue.

Event Manager & Assessments – Interview Workflow

The Interview Scheduling workflow will allow candidates to schedule interviews themselves.

Product	<ul style="list-style-type: none">▫ 2x BrassRing▫ New UI▫ Workbench Self-Service▫ Talent Gateways	<ul style="list-style-type: none">▫ Agency Manager▫ Data Insight Tool▫ SmartApproval▫ Event Manager/Assessments
Visible Changes	<ul style="list-style-type: none">▫ No – contact your CSC for implementation details.▫ Yes – see the <i>Visible Changes</i> document sent out for each release build.	
How do I get this feature?	<ul style="list-style-type: none">▫ Automatic – see details below.▫ Specific conditions required – see details below.▫ Configuration required – see details below.	

Benefits

This workflow process will allow candidates to proceed through an application process, take an assessment, and schedule an interview time based on the assessment score by themselves.

Feature Description

Interview Scheduling workflow that is integrated into 2xB and Event Manager will allow candidates to schedule an interview once they have scored the required marks in an assessment. Candidates will be able to choose date and time slots available for interview. The schedule interview details showing candidates and interviewers can be accessed and printed. Also an email confirmation will be sent to the candidate, which may include interview venue address, what to do for the interview, etc.

Who uses – Applicants/candidates and Recruiters

2x BrassRing User

Req Configuration:

1. After creating a scheduled, recurring event in Event Manager with at least one time slot each, log in to 2xB to configure the req.
2. Click **Reqs** à **Add new Req**.
3. The Events custom field is displayed in the req page.
4. Select the **Req form** (configured with Event custom req field) and job code, and click **Continue**.
5. Scheduled Events are displayed in the Events dropdown.
6. Complete the req as you do normally.
7. Post the req in multiple Talent Gateways with scoring.



Ensure that candidates can create a new profile and upload the CV/Resume.

Candidate Experience

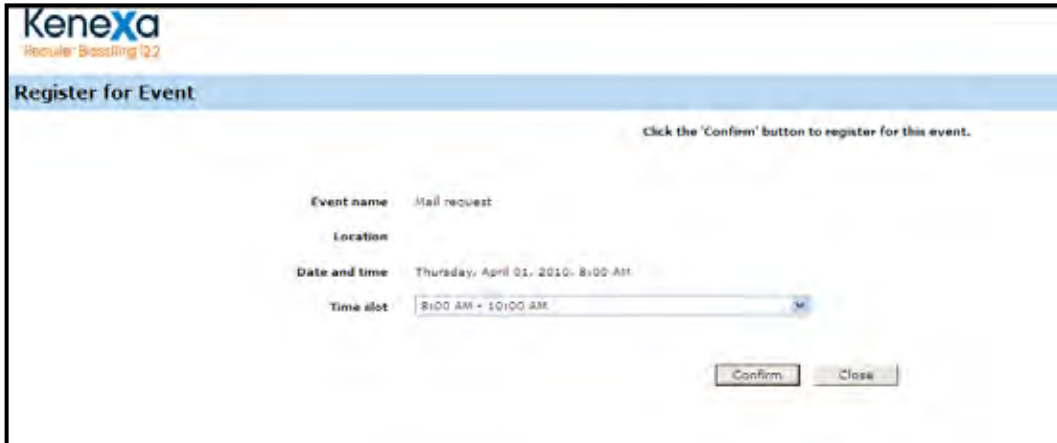
With Assessments using Talent Gateways:

1. Candidate searches for jobs, clicks **Apply to Job(s)** button and submits all the required data (contact info, education details, experience, etc.) to create a new profile.

2. Assessment link is displayed in the Confirmation page of the Talent Gateway and this is sent as an eLink to the candidate.
3. Candidate takes the assessment by clicking on the eLink.
4. Once the candidate achieves the required score, he or she is redirected to Schedule an Interview page.

Registering for an Event:

When the Register for Event Page appears, the candidate takes the following actions:



The screenshot shows the Kenexa 'Register for Event' page. At the top left is the Kenexa logo with the tagline 'Recruit. Assessing Q2'. Below the logo is a blue header bar with the text 'Register for Event'. The main content area has a light blue background and contains the following information: 'Click the 'Confirm' button to register for this event.' followed by event details: 'Event name: Mail request', 'Location: (blank)', 'Date and time: Thursday, April 01, 2010, 8:00 AM', and 'Time slot: 8:00 AM - 10:00 AM'. At the bottom right, there are two buttons: 'Confirm' and 'Close'.

1. Select a time slot from the dropdown.
2. Click the **Confirm** Button to register for the event. Confirmation message “**Thank you for scheduling your Interview time**” is displayed.

A confirmation message is sent to the candidates email address.

Limitations and Known Issues

Confirmation messages are sent to candidates via email. (If candidates don't have email addresses no message is sent)

How Do Clients Get this Feature?

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

Gateway Questionnaires – Auto-logout on Close

When candidates click the “Close” button on a Gateway Questionnaire (GQ) prior to submission, they will automatically be logged out of the Talent Gateway.

Product	<ul style="list-style-type: none">• 2x BrassRing• New UI• Workbench Self-Service• Talent Gateways	<ul style="list-style-type: none">• Agency Manager• Data Insight Tool• SmartApproval• Other
Visible Changes	<ul style="list-style-type: none">• No – contact your CSC for implementation details.• Yes – see the <i>Visible Changes</i> document sent out for each release build.	
How do I get this feature?	<ul style="list-style-type: none">• Automatic – see details below.• Specific conditions required – see details below.• Configuration required – see details below.	

Benefits

This feature solves the problem of a candidate’s accidentally taking over the previous user’s session when that user abandons the session without logging out, either by closing the GQ or simply leaving it to be closed by the next person.

Feature Description

For Talent Gateways that do **not** have the setting “Candidate remains logged on” enabled, candidates who click the “Close” button on a GQ prior to submission will automatically be logged out. The window will close and the main Talent Gateway page will refresh to the landing page.

Behavior Details and Exceptions

For Full and Global Talent Gateways with the “Candidate remains logged on” setting **un-checked**, this behavior when closing applies to the following pages, as detailed below: GQ (with job selected), GQ (with no job selected).

- If candidate has elected to apply to multiple jobs of different application types and goes to “Selected jobs” page where sequential applies are allowed, then completing a GQ from there will return the candidate to the Selected jobs page as still logged in (if appropriate). The jobs associated with that GQ will be marked as “completed” (as will occur with existing functionality).
- If a referral candidate has applied to a GQ from a referral where the candidate entered on the “Search openings” page, then the “landing page” is considered as the page where the candidate entered the Talent Gateway. Only in cases where candidate is normally allowed to see the landing page will the candidate be returned to that page.
- For Full and Global Talent Gateways, the landing page is considered to be the page where Search openings and Log in options display (not the custom “home” page configured, if any).
- The Close button behaves the same as currently (closing both browser windows and not returning the user to any Talent Gateway page) for Auto-launch GQ functionality (including GQ Basic Talent Gateway Auto-launch).

For Full and Global Talent Gateways with the “Candidate remains logged on” setting **checked**, the Gateway Questionnaire “Close” button will not log out the candidate, but will only close the window and return the user to the main Talent Gateway window, as per existing functionality. Closing behavior in this case is detailed below.

- Candidate always remains logged on during the session, unless s/he uses the “Log off” button/link or closes the Talent Gateway main window (not GQ window), which ends the session. The Gateway Questionnaire “Close” button has no effect on the logged-in status of a candidate.
- Session expiry functionality remains unchanged (automatically logging out candidates due to time elapsed based on client setting).

- Clicking “Close” button on GQ refreshes the underlying Talent Gateway page (e.g., Saved drafts) or returns the candidate to the Talent Gateway landing page in case of a single-GQ submission completed.
- In cases where the candidate has elected to apply to multiple jobs of different application types and goes to “Selected jobs” page where sequential applies are allowed, then completing a GQ from there returns the candidate to the Selected jobs page with the jobs associated with that GQ marked as “completed.”
- The Close button behaves the same as currently (closing both browser windows and not returning the user to any Talent Gateway page) for Auto-launch GQ functionality (including GQ Basic Talent Gateway Auto-launch).

Limitations and Known Issues

This new Close button functionality applies only to newly rendered GQs. Pre-existing GQs will continue to exhibit old Close button functionality.

How Do Clients Get this Feature?

This feature is available automatically without configuration, but behavior depends on the setting for “Candidate remains logged on.” Please contact your CSC for more information help with that setting.

Gateway Questionnaires – Filtering by Talent Gateway

A new Gateway Questionnaire property associates Gateway Questionnaires with Talent Gateways to provide GQ selection lists conveniently filtered by TG.

Product	<input type="checkbox"/> 2x BrassRing <input type="checkbox"/> New UI <input type="checkbox"/> Workbench Self-Service <input type="checkbox"/> Talent Gateways	<input type="checkbox"/> Agency Manager <input type="checkbox"/> Data Insight Tool <input type="checkbox"/> SmartApproval <input type="checkbox"/> Other
Visible Changes	<input type="checkbox"/> No – contact your CSC for implementation details. <input type="checkbox"/> Yes – details in <i>Visible Changes</i> document sent for each release build.	
How do I get this feature?	<input type="checkbox"/> Automatic – see details below. <input type="checkbox"/> Specific conditions required – see details below. <input type="checkbox"/> Configuration required – see details below.	

Benefits

Users can more easily choose an appropriate Gateway Questionnaire for the Talent Gateway to which they are posting.

Feature Description

A new Gateway Questionnaire (GQ) property, **To be available on the following Talent Gateway(s)**, associates GQs with specific Talent Gateways (TGs) or sets of TGs. As a result:

- When posting jobs, 2x BrassRing users choosing a GQ for a Talent Gateway select from a filtered list of GQs associated with that TG.
- When editing or adding a job code (for clients with Session.JobCodeDefaultData = Yes), 2xB administrators setting defaults for the TG posting options select from a filtered list of GQs associated with that TG.

Limitations and Known Issues



To accommodate pre-existing postings and Job Code Default Data associations, when users edit posting options, the currently selected GQ will be the selected value in the Select Gateway Questionnaire field **even if** that GQ's property setting does not associate it with that TG.

The **Site general job submission type** list is not filtered by the GQ **To be available on the following Talent Gateway(s)** property. Since many clients develop a special GQ for “jobless” submissions, they may not wish to have that GQ in the list of possible GQs to choose from when posting a requisition..

How Do Clients Get this Feature?

This feature is controlled by a new Gateway Questionnaire properties setting. Please contact your CSC or Certified Workbench User for more information about enabling this feature.

Workbench Self-Service

Who does this: Certified Workbench User, Tier 0 and above

You can set the “To be available on the following Talent Gateway(s)” property for Gateway Questionnaires in Workbench when adding or editing a Gateway Questionnaire:

Tools > Gateway Questionnaires > Edit properties [for selected GQ]

Select specific active, full and global TGs or select **All Talent Gateways**. Your selections will also be displayed when you view properties (even if the TGs have since been inactivated).

Gateway Questionnaire properties - Microsoft Internet Explorer provided by Kenexa Technology, Inc.

Gateway Questionnaire properties

General Header Footer

Gateway Questionnaire name [English - United States]

Default window size Maximized
 974 by 718 pixels
 750 by 550 pixels

Days a Gateway Questionnaire is available after being saved as draft

Create form(s) only

Suggest log-in for candidates who haven't logged in

Require log-in for candidates who haven't logged in

Do not prompt for log-in

Display asterisks for required questions?

Allow auto-extraction if Talent Gateway allows it?

Allow per req form data? *GQ will only be available for job applies.

Org groups with access

To be available on the following Talent Gateways: All Talent Gateways
 Selected Talent Gateways below:

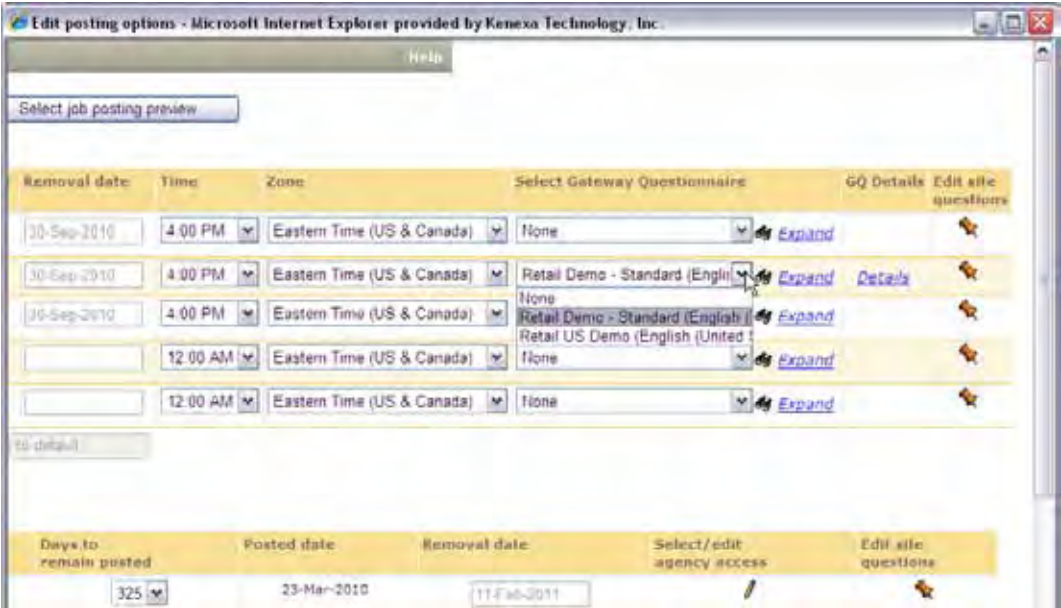
Field Used to track Complete vs Incomplete Submissions *Only available when "Process Incomplete Submission" is checked

Save Revert to saved Cancel

2x BrassRing User Experience

Once Gateway Questionnaires have been made available for selected Talent Gateways, 2xB users see only those associated GQs listed on the **Edit posting options** page when they post a req or edit a posting.

1. Navigate to the Posting options page for a req and select a Talent Gateway to which to post.
2. Click the **Select Gateway Questionnaire** field list to choose from the GQs associated with that TG (and to which your Org group has access).



2x BrassRing Admin/Admin+ Experience

When a client with Session.JobCodeDefaultData = Yes edits a Job Code in 2xB, they can set defaults for the Talent Gateway posting options for any particular job code. Once Gateway Questionnaires have been made available for selected Talent Gateways, 2xB administrators setting defaults (**Admin > Admin+ > Codes > Job Code**) select from a list of GQs associated with that TG.

HR Status – Display Optional Popup Form

A new client setting, **HR Status display existing Optional popup form**, presents an *existing One per candidate* or *Single per candidate/req* form linked to the HR Status so that the 2xB user can edit or view it instead of simply seeing a message that it exists. When the setting is off, when a One per candidate form already exists, users updating the candidate to the linked HR Status continue to see only a message informing them that the form has already been completed for the candidate.

Product	<input checked="" type="checkbox"/> 2x BrassRing <input type="checkbox"/> New UI <input type="checkbox"/> Workbench Self-Service <input type="checkbox"/> Talent Gateways	<input type="checkbox"/> Agency Manager <input type="checkbox"/> Data Insight Tool <input type="checkbox"/> SmartApproval <input type="checkbox"/> Other
Visible Changes	<input checked="" type="checkbox"/> No – contact your CSC for implementation details. <input type="checkbox"/> Yes – see the <i>Visible Changes</i> document sent out for each release build.	
How do I get this feature?	<input type="checkbox"/> Automatic – see details below. <input type="checkbox"/> Specific conditions required – see details below. <input checked="" type="checkbox"/> Configuration required – see details below.	

Benefits

For users with appropriate privileges, streamlines their ability to take action on a form.

Feature Description

A candidate form can be linked to an HR Status so that it will automatically display when that status has been chosen (this is existing functionality, and the 2xB user must have appropriate access to view or edit the form). In some instances, however, a standard message is displayed in the popup instead of the form. The new client setting, **HR Status display existing Optional popup form**, provides the ability to view or edit an existing linked form in additional instances, as described below.

- If the form has been designated as One per candidate and one form has already been completed for the candidate:
When setting is **Yes**, the system will display the form.
When setting is **No**, instead of the form the system will continue to display the message, “This form has already been completed for this candidate.”
- If the form has been designated as Single per candidate/req and one form has already been completed for the candidate, and the HR Status action is happening **inside** of a Req folder:
When setting is **Yes**, the system will display the form.
When setting is **No**, instead of the form the system will continue to display the message, “This form has already been completed for this candidate for the req.”
- If the form has been designated as Single per candidate/req form and the HR Status action is happening **outside** of a Req folder:
Regardless of setting, the system will continue to display the message, “This form can only be added inside a req.”
- If the user does not have the privilege to add the form:
Regardless of setting, the system will continue to display the confirmation only (confirming that the candidate’s HR Status has been updated).

When the candidate form is displayed, any user type privileges are respected. If the user has edit form privilege such as “Modify all” or “Modify – my reqs,” then:

- form will be in edit mode (editable)
- fields with existing values are pre-populated
- field-level user privileges/security still apply (e.g., field is hidden if user type doesn’t have access).

If the user has view form privilege but no edit privilege:

- form will be in view mode (read-only)
- fields with existing values are pre-populated
- field-level user privileges/security still apply.

Regardless of the setting, the form does not pop up in these cases (instead, a message is displayed):

- If the form is a Single per candidate/req form and the HR action is happening **outside** of a Req folder.
- If the user does not have the privilege to add, edit, or view the form.

Sample Workflows

Sample workflow with Edit or View privileges:

- 2xB user locates desired candidate within a folder.
- User updates the candidate's HR status to the status with a Single per candidate/req form required.
- Candidate already has this form for this req.
- User has edit/view access to the form.
- Form is presented in edit/view mode with all existing populated fields.

Sample workflow with no privileges:

- 2xB user locates desired candidate within a folder.
- User updates the candidate's HR status to the status with a Single per candidate/req form required.
- Candidate already has this form for this req.
- User does not have access to the form.
- User sees a standard confirmation of the HR Status update.

Sample workflow with Multiple per candidate/req form:

- 2xB user locates desired candidate within a folder.
- User updates the candidate's HR Status to the status with a Multiple per candidate/req form required.
- Candidate already has this form for this req.
- User has edit access to the form.
- Form is presented in add mode per existing functionality. (If optional pop-up form is "multiple" type, then the system always presents a new form in Add mode.)

Sample workflow with HR status and approval process:

- 2xB user locates desired candidate within a folder.
- User updates the candidate's HR Status to the status with a Single per candidate/req form required.
- HR status is configured to select a candidate form that is enabled with a parallel or sequential approval process. (Approval process is not applicable to "multiple" type forms, so form must be One per candidate or Single per candidate/req.)
- Candidate already has this form for this req.
- User has edit access to the form.
- Form is presented in edit mode with all existing populated fields.
- Save and begin approval process works per existing functionality.

Sample workflow with HR status with integration:

- 2xB user locates desired candidate within a folder.
- User updates the candidate's HR status to the status with a Single per candidate/req form required.
- Candidate already has this form for this req.
- User has edit access to the form.
- Form is presented in edit mode with all existing populated fields.
- Integration still works as today.

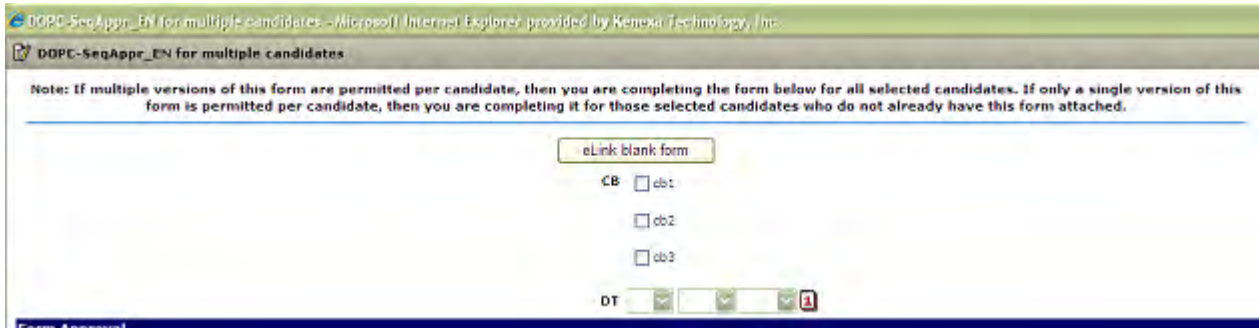
Limitations and Known Issues

- Multiple per candidate/req forms continue to work as they do today, even when the setting is enabled.
- The functionality is only available when updating a single candidate. It is not available for multiple candidate updates. Multiple candidate updates continue to work as they do today.

This existing message is displayed for cases with multiple candidates when:

- one or more candidates already have the form added but at least one candidate does not have the form
- none of the candidates have the form added

“Note: If multiple versions of this form are permitted per candidate, then you are completing the form below for all selected candidates. If only a single version of this form is permitted per candidate, then you are completing it for those selected candidates who do not already have this form attached.”



- If all the candidates have the form already added, this existing message is displayed:

“This form has already been completed for these candidates: <cond1>
<cond2>...”



How Do Clients Get this Feature?

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

HR Status – File to Req with Status Auto-selected

When 2xB users manually file candidates to a req, a new user type privilege enforces filing to the initial HR Status associated with the req form.

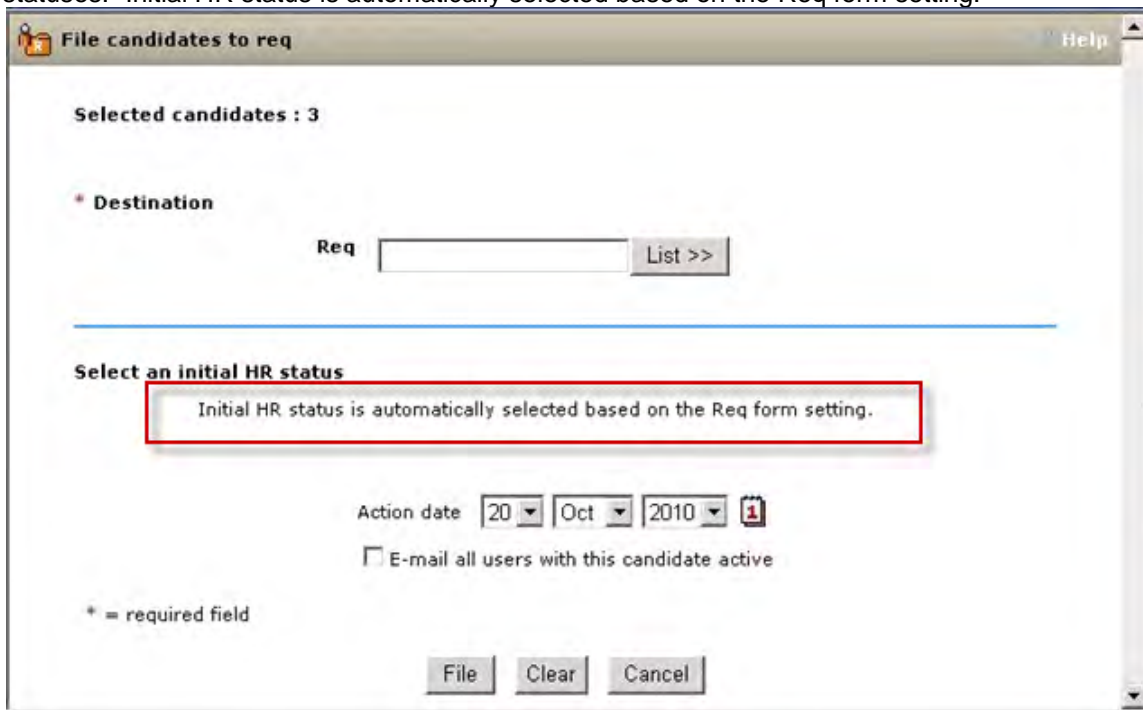
Product	<ul style="list-style-type: none">⊖ 2x BrassRing⋄ New UI⊖ Workbench Self-Service⋄ Talent Gateways	<ul style="list-style-type: none">⋄ Agency Manager⋄ Data Insight Tool⋄ SmartApproval⋄ Other
Visible Changes	<ul style="list-style-type: none">⋄ No – contact your CSC for implementation details.⊖ Yes – details in <i>Visible Changes</i> document sent for each release build.	
How do I get this feature?	<ul style="list-style-type: none">⋄ Automatic – see details below.⋄ Specific conditions required – see details below.⊖ Configuration required – see details below.	

Benefits


Enforces consistent initial HR Status for candidates filed to req folders.

Feature Description

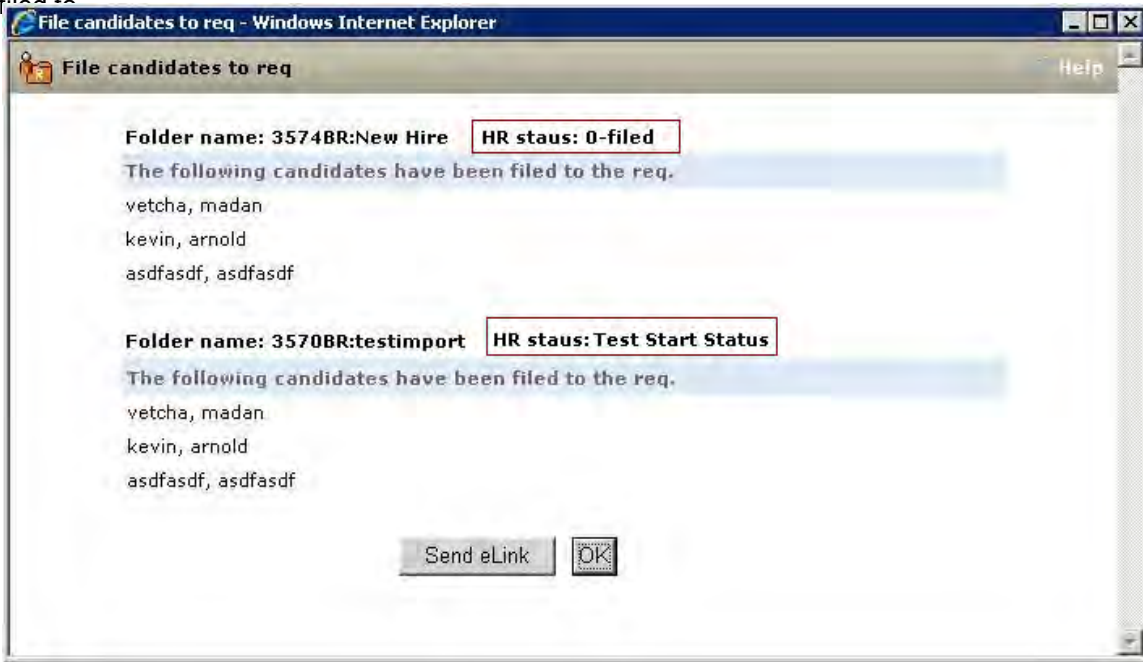
A new user type privilege restricts the ability of users to select an HR Status when filing candidates to a req. When using the **File to req** action, restricted users types see the following message instead of the list of initial statuses: “Initial HR status is automatically selected based on the Req form setting.”



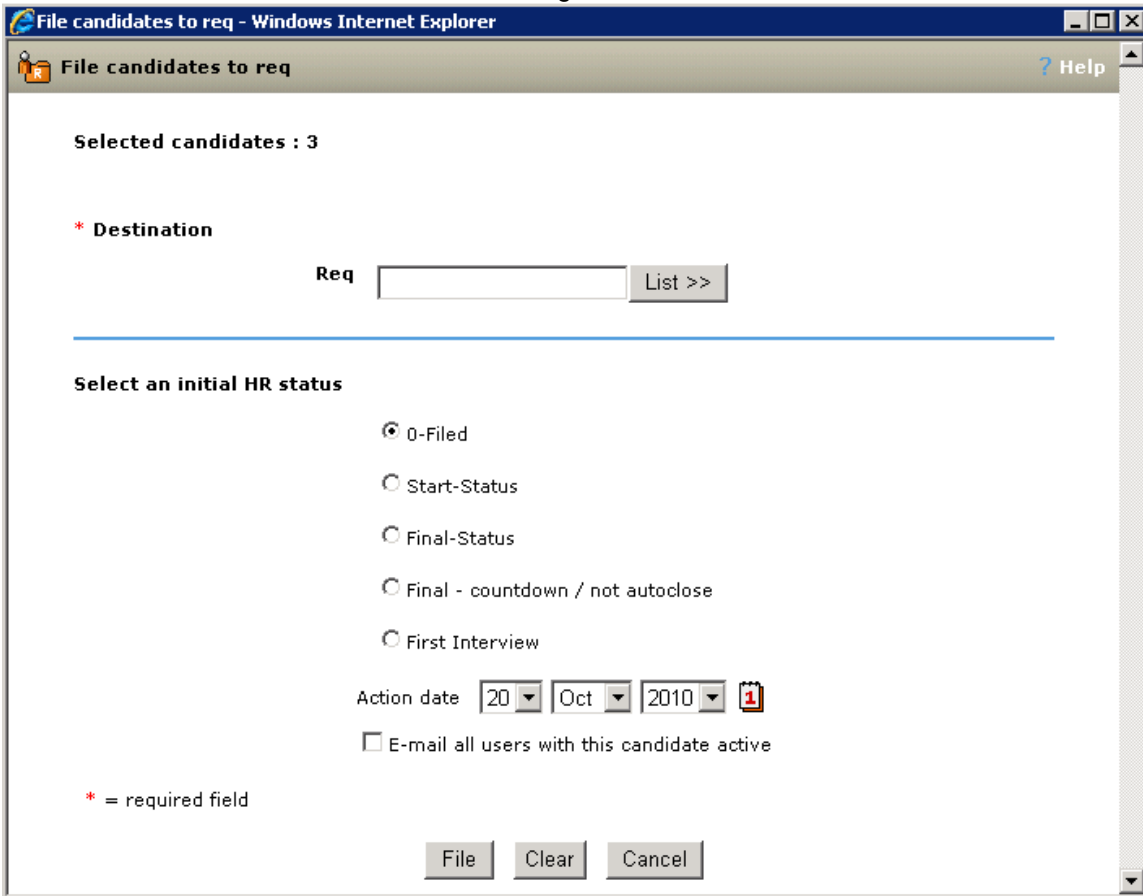
The candidate is filed to the same starting HR Status that is configured for automatic filing by Autofiler or Insta-filer for that particular req form.

 Autofiler/Insta-filer files the candidates to “0-filed” if the req form type’s configuration for HR Status for Autofiler/instafiler is “None.”

The confirmation shown after a restricted user clicks **File** now includes the HR Status that the candidates are filed to.



If the restriction is off, current behavior does not change. Users still see and can select from the list of available initial statuses. The confirmation is also unchanged.



How Do Clients Get this Feature?

This feature is controlled by a new user type privilege in Workbench Self-Service. Please contact your CSC or Certified Workbench User for more information on enabling the feature.

Workbench Self-Service

Who does this: Certified Workbench User, Tier 1 and above

Set the Candidate Actions 3 user type privilege, **Restrict HR Status - file to Req**, to restrict the ability of users to select an HR Status when filing candidates to a req. The candidate will be filed to the same starting HR Status that is configured for automatic filing by Autofiler/instafile for that particular req form.

Tools > Users > User types > Edit type permissions [for selected type] > Set privileges for Candidate Actions 3



The privilege is unchecked by default for all user types.

HR Status – User Type Privilege Enhancements

The existing “HR status - view all” privilege has been split into “view all” and “view my” privileges, which allows clients to set a privilege so that users are restricted from viewing HR Status data for which they do not have a “my req” relationship, while still allowing them to add or update HR Status in their own reqs.

Product	<ul style="list-style-type: none">▫ 2x BrassRing▫ New UI▫ Workbench Self-Service▫ Talent Gateways	<ul style="list-style-type: none">▫ Agency Manager▫ Data Insight Tool▫ SmartApproval▫ Other
Visible Changes	<ul style="list-style-type: none">▫ No – contact your CSC for implementation details.▫ Yes – details in <i>Visible Changes</i> document sent for each release build.	
How do I get this feature?	<ul style="list-style-type: none">▫ Automatic – see details below.▫ Specific conditions required – see details below.▫ Configuration required – see details below.	

Benefits

This feature adds additional control over users’ access to view HR Status data for which they do not have a “my req” relationship.

Feature Description

Currently, these user type privileges associated with HR Status control who can view, add, or update HR Status:

- HR status - add/update in all reqs/all folders/my inbox
- HR status - add/update in my reqs/my folders/my inbox
- HR status - view all

For users to be able to add or update HR Status in their own reqs, they have also needed the “HR status - view all” privilege. Although they could add or update only those HR Statuses for which they had a “my req” relationship, they could view HR Status data (current status and status history) for any reqs a candidate is associated with. To allow clients to set a privilege so that users are restricted from viewing HR Status data for which they do not have a “my req” relationship, the existing “HR status - view all” privilege has been split into “view all” and “view my” privileges.

The existing “HR status – view all” privilege is renamed (with no change in functionality):

HR status – view in all reqs/all folders/my inbox

The following new privilege has been added:

HR status – view in my reqs/my folders/my inbox

The newly-added privilege allows user to view the HR Status of a candidate within folders having a “my” relationship (my req folders, my folders, my inbox). With this privilege:

- From within “my” folder, the HR status columns (HR status, HR status date, Updated by) will be visible.
- From outside “my” folders, HR status columns will be hidden.
- In Talent Record, user will see the HR Status tab (users with neither “view” privilege do not see the tab).
- In Talent Record, user will see HR Status data pertaining to “my” folders only, or a blank HR Status table if the candidate is not in any of “my” folders.

A user who has access only to view HR status in my folders, will not be able to see the HR Status text when they are in the folders outside “my” relationship. For example, a user with “View all” privilege will see the HR Status of a candidate as below (current behavior)

Screen with **HR status – view in all reqs/all folders/my inbox** privilege

HR status date	Folder	Req ID	Req/Folder	Updated by	HR status (click to update)
20-Oct-2010		3582BR	PM- \$#SRAssessment	bandaru, srinivasu ()	SRTechRound
04-Jun-2010		1006BR	Goldberg form5	Manager, Query ()	0-Filed
04-Jun-2010			DileepT1	Manager, Query ()	0-Filed
04-Jun-2010			samyukta	Manager, Query ()	0-Filed
04-Jun-2010		2518BR	sdfsf	Manager, Query ()	0-Filed
04-Jun-2010		2016BR	testemail	Manager, Query ()	0-Filed
04-Jun-2010			test	Manager, Query ()	0-Filed

Screen with **HR status – view in my reqs/my folders/my inbox** privilege – for the logged-in user, reqs 1006BR, 2518BR, and working folder “samyukta” are not my folders, so are hidden

HR status date	Folder	Req ID	Req/Folder	Updated by	HR status (click to update)
20-Oct-2010		3582BR	PM- \$#SRAssessment	bandaru, srinivasu ()	SRTechRound
04-Jun-2010			DileepT1	Manager, Query ()	0-Filed
04-Jun-2010		2016BR	testemail	Manager, Query ()	0-Filed
04-Jun-2010			test	Manager, Query ()	0-Filed

Pages Affected

Pages affected in classic 2xB:

- Candidate Listing pages - HR Status column in Candidate Grid
 - From within My Req Folder and outside my Req folder
 - My Candidates – in inbox/my/working folders
- Talent Record – HR Status tab – Current status and Status history tabs
- eLink Talent Record – Include HR status – HR status tab - Current status and Status history tabs

Pages affected in New Talent Record:

- Display of Action log events – “HR Status – Updated” rows display per new privilege
- New action log event, “Add to folder” depends on new privilege. i.e., if a user has only “view my”, then, “Add to Folder” is not visible if it is not “my” folder.
- Action Log Filter – HR Status in menu checks for the new privilege instead of View All. Filter honors changes noted above.
- Ribbon – If HR Status is in the Ribbon, and the folder that the user is viewing the candidate from is not “my,” then does not display status.

Changes in New UI – Candidate Results Panel:

- HR Status column display depends on new privilege.
- Filter menu honors new privilege.

Migration

All user types that currently have “HR status – add/update in my reqs/my folders/my inbox” privilege will also have the new privilege, “HR status – view in my reqs/my folders/my inbox.” All user types that have “HR status – view in all reqs/all folders/my inbox” privilege, should also have the new privilege, “HR status – view in my reqs/my folders/my inbox.”

Best Practice Recommendations

Most user types should have the new **HR status – view in my reqs/my folders/my inbox** privilege rather than. **HR status – view in all reqs/all folders/my inbox.**

How Do Clients Get this Feature?

This feature is controlled by a new user type privilege. Please contact your CSC or Certified Workbench User for more information.

Workbench Self-Service

Who does this: Certified Workbench User, all tiers

These user type privileges for HR Status are available in **Tools > Users > User types > Edit type permissions**. Select **Candidate Actions**:

- **HR status – view in all reqs/all folders/my inbox**
- **HR status – view in my reqs/my folders/my inbox**
- **HR status - add/update in all reqs/all folders/my inbox**
- **HR status - add/update in my reqs/my folders/my inbox**

Elements to remember when setting up this feature:

- Users who are removed from “view all” privilege and given only “view my” privilege will be limited to viewing the HR statuses of folders having “my” relationship only.

- There are two other privileges in Candidate Actions 2, “HR status - view undo HR statuses (via 2xB)” and “HR status - view undo HR statuses (via eLink).” These privileges control whether to show the undo HR Status history in the “status history” tab (shown in the previous figures).
- Even if a user has “HR status - view undo HR statuses (via 2xB)” privilege, the undo status history is still hidden unless the also has “view all” privilege.

Integrations – Kenexa Assessments

Several ease-of-use features have been added to improve the integration of Kenexa Assessments (also referred to as Searchable KAS) with Kenexa 2x BrassRing. The latest enhancements include:

- Configurable page title for TG Assessments page (default is Pending Assessments)
- Default batches for Talent Gateways
- Field type is now single-select for the field that determines number of days until reminder email is sent
- Expanded text area for the Default assessment invitation field to 5000 characters

Product	<ul style="list-style-type: none"> ▫ 2x BrassRing ▫ New UI ▫ Workbench Self-Service ▫ Talent Gateways 	<ul style="list-style-type: none"> ▫ Agency Manager ▫ Data Insight Tool ▫ SmartApproval ▫ Kenexa Assessments
Visible Changes	<ul style="list-style-type: none"> ▫ No – contact your CSC for implementation details. ▫ Yes – details in <i>Visible Changes</i> document sent for each release build. 	
How do I get this feature?	<ul style="list-style-type: none"> ▫ Automatic – see details below. ▫ Specific conditions required – see details below. ▫ Configuration required – see details below. 	

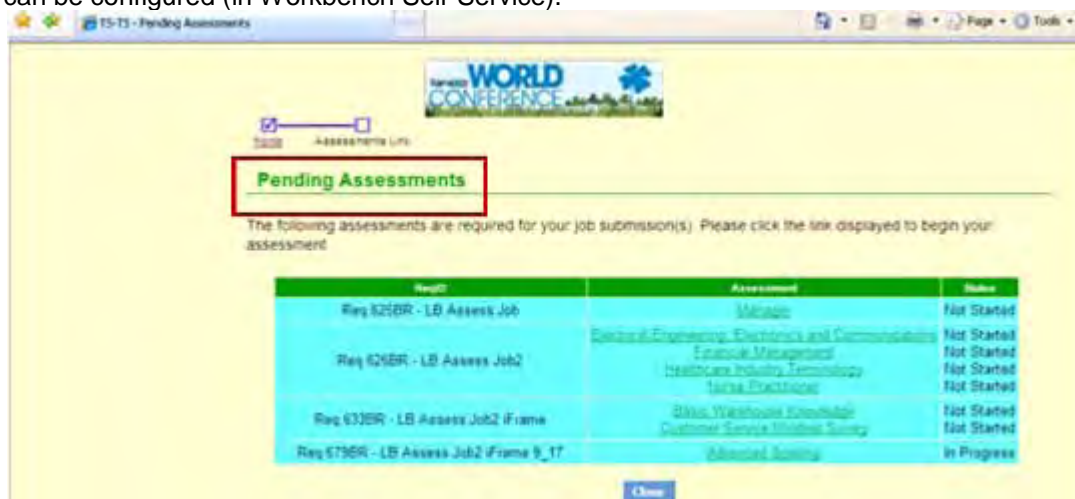
Benefits

Improves the candidate experience when taking assessments.

Feature Description

The integration of Kenexa Assessments (KAS) with 2xB includes enhancements in the following areas:

- The assessments page provides one point of access for candidate to access all pending assessments. (Became available July 2010). Now the default page title for this assessment page, Pending Assessments, can be configured (in Workbench Self-Service).

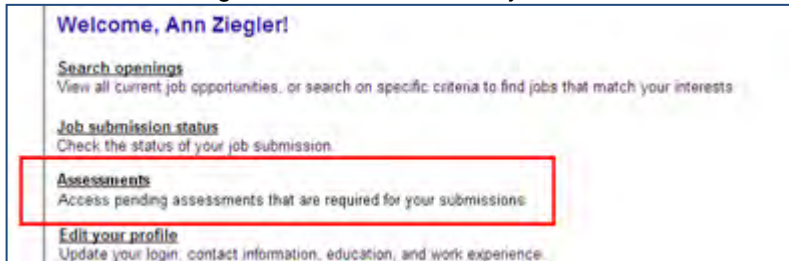


- Default batches for each Talent Gateway can now be set up for your account.
- **AssessmentDaysRemind** is a custom req field that determines the number of days until “reminder” email is sent to candidates. The field type has changed from numeric to single-select. bld 9
- Expanded text area for the Default assessment invitation field to 5000 characters from a previous limit of 1000 characters.
- Reusing results—2xB will reuse existing assessment results if already on file for a different Req; candidate will only be sent link if assessment truly is required. (Became available July 2010)

Talent Gateway Assessments Page

The TG Assessments page provides a single point of entry for all required assessments. It can be accessed in a number of ways:

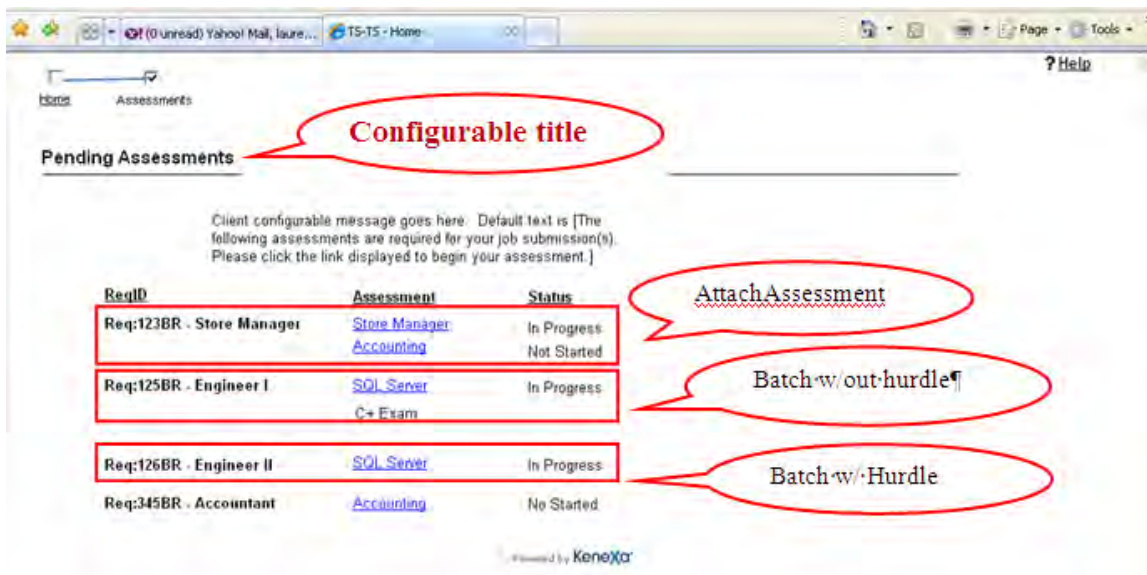
- Candidates can log into the Talent Gateway and see **Assessments** as one of their options.



- Candidates apply for jobs requiring assessments, and the confirmation page presents a link to the Assessments page (rather than displaying an assessment link for each job application).
- Alternatively, clients can use the “Launch Assessment via Continue Button” option, where candidates click the **Continue** button instead of a link to go to the Assessments page.
- Candidates click an eLink, sent by the Talent Gateway or Run Assessment/Retake Assessment actions, Reminder email link, Automation Manager link, Req > Send communication w/ token. All links provided to the candidate will route them to this page.

The Assessments page displays outstanding assessments for each requisition for which the candidate has applied. Before presenting an assessment link, the system first determines whether valid results are already on file. If so, those results are copied to the new requisition and the candidate is not required to take any action. (If only one unique assessment is required for the candidate, the assessment is auto-launched rather than the candidate needing to click the assessment link from the assessment page. This is true both for the confirmation page link and the launch via continue button options.)

For assessment batches, the system also determines which assessment is the next in sequence and ensures only that assessment has an active link on the assessment page. Additionally, if the batch is using hurdling, the system determines whether the candidate received a passing score, and if not, the candidate is not invited to complete the next assessment.



The display of assessments (and active links) depends on your configuration:

- If AttachAssesment is being used, then all assessments requested from the Req are displayed, and all are actionable.

- If AssessmentBatch without hurdling is used, then all assessments are listed in accordance with their sequence number. Only the actionable one is an active link; the others simply display the title of the assessment as plain text.
- If AssessmentBatch with hurdling is used, then only the actionable assessment is displayed.

The default page title for this assessment page, Pending Assessments, [can be customized](#) by certified Workbench users.

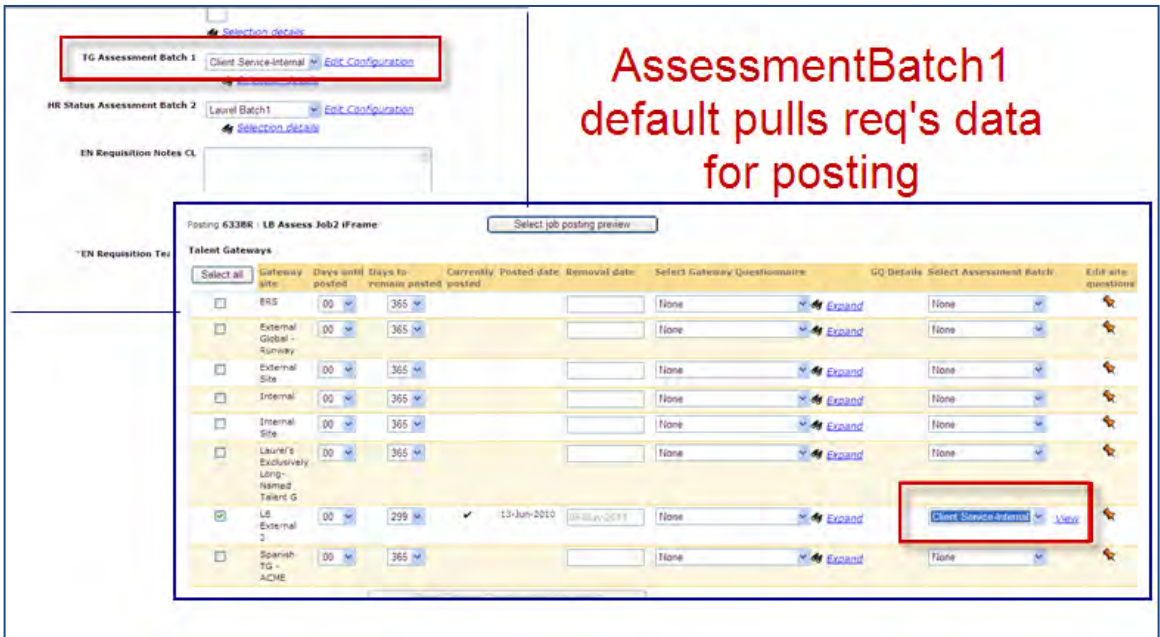
Once all assessments are completed, the requisition information is no longer displayed on the page. With no outstanding assessments for any req, the Assessment page displays “thank you” text, either the default text or your custom message.



Using Default Batches

Assessment batches create greater flexibility in terms of how and when assessments are required. Since they are associated with TGs, you can require different assessments of internal candidates and external candidates, for example. However, you may not expect or want recruiters and other users to have to select appropriate batches from those available for a TG. Talent Gateway administrators can set default batches in Workbench to solve this problem.

Posting page “Assessment Batch” field will be defaulted for the req (to the batch selected on the req in the corresponding Default Assessment Batch Field).



Single-select Field for Days until Assessment Reminder

AssessmentDaysRemind is a custom req field that determines the number of days until “reminder” email will be sent to candidates. The field type has changed from numeric to single-select, so that clients can create the value they want for the company or business unit and make the field required. For example, clients can now set the selection to enforce for all reqs a 3-day period until the assessment reminder email is sent. Certified Workbench users can [edit this field](#) to require a consistent value or enforce consistent options.

When adding reqs with assessments in 2xB, users will now select a number of days instead of entering a digit.

Expanded Default Assessment Invitation Field

The Default assessment invitation field is the source of the default text sent in Run Assessment or Retake Assessment invitations. The size has expanded to 5000 characters from a previous limit of 1000 characters. Contact your Service Consultant for help setting up or changing this.

Using Existing Results

Results returned for an assessment are processed for all reqs to which the candidate has applied and for which an invitation was sent (either via Talent Gateway apply, Run Assessment, Send Candidate Communication, Automation Manager HR Status Update – Notify Candidate with assessment invitation token, etc.).

When a user selects the Run Assessment action, 2xB determines whether valid, unexpired results are already on file for the candidate within a different req. If so, the results are copied for the new req. The candidate receives an eLink request only if results are missing, and the link redirects the candidate to the new TG Assessment page. If all results are available, the system blocks the generating of the eLink and notifies the 2xB user that results have been copied into the new req.

If the existing results are flagged for Retake in any requisition, the results are not used. Instead a fresh link is generated. Once the new results are returned to 2xB, all reqs requesting the assessment since the time the Retake was initiated are updated with the new results.

Best Practice Recommendations

Retake Assessment functionality should be reserved for system administrators! This functions similarly to Run Assessment, however, only assessments that have previously been taken with results on file in 2xB will be available for selection. Assessments that have been partially completed will not be available to select from.

How Do Clients Get this Feature?

Contact your Kenexa consultant for help with this feature.

Workbench Self-Service

Who does this: Certified Workbench User, Tier 1 and above

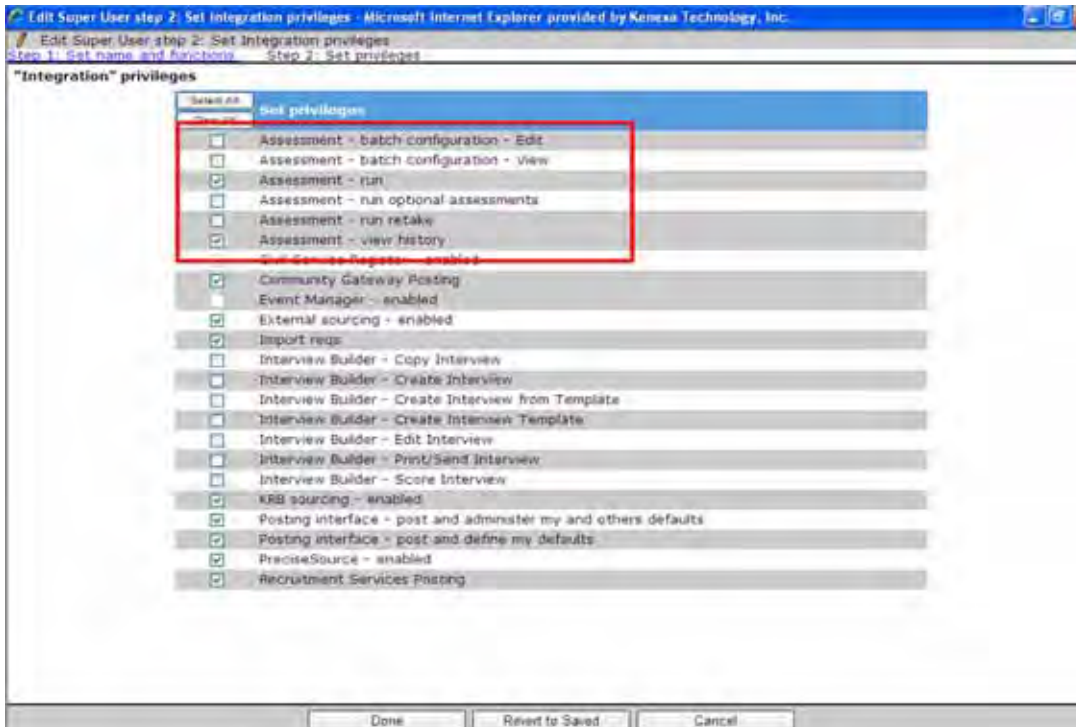
Certified Workbench users can perform these tasks as necessary (generally, if changes or additions are needed), but Kenexa Service Consultants will assist with initial KAS setup.

- Assign assessments-related user type privileges
- Add custom req fields to req forms
- Configure candidate forms
- Customize Talent Gateway text (including the Pending Assessments page title)
- Add assessment widget to Gateway Questionnaire(s)

User Type Privileges

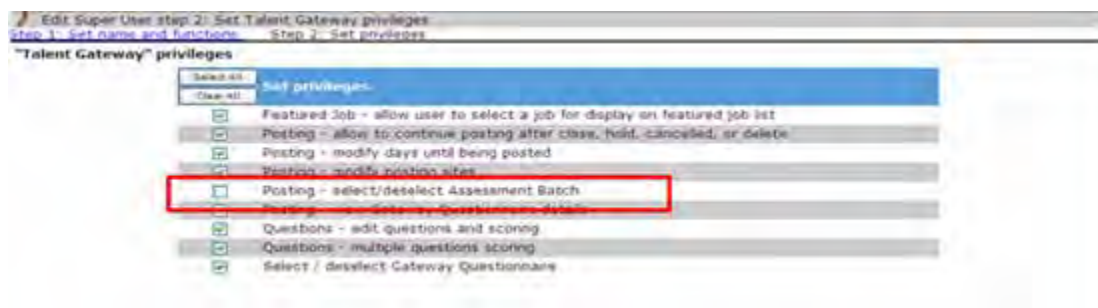
You can set the following assessments privileges in Workbench **Users > User types > Edit type permissions > Set privileges** (for Function = **Integration**):

- **Assessments – run:** user type can run assessments
- **Assessments – run optional assessments:** can choose from the client’s full list of assessments in order to send invitations for assessments that are not specifically required for the requisition.
- **Assessments – run retake:** can allow candidates to retake assessments
- **Assessments – batch configuration – Edit:** can edit the batch configuration when adding a req
- **Assessments – batch configuration – View:** can view the batch configuration when adding a req
- **Assessment – view history:** can access the Integration tab to view assessment history



Additionally, when assessment batches are in use, you can set the following assessments privilege in Workbench **Users > User types > Edit type permissions > Set privileges** (for Function = **Talent Gateway**):

Posting – select/deselect Assessment Batch: user type can select which Assessment Batch will be launched when candidates apply on a particular Talent Gateway.



Custom Req Fields for Req Forms

You can add custom req fields for req forms as needed in Workbench **Tools>Forms>Reqs>Req forms>Define custom req fields**.

****NEW** The AssessmentDaysRemind field is now single-select** rather than numeric so you can require a consistent value or enforce consistent options.

Field ID	Field Name	Description	Data Type	Required	Visible	Active	Designate	Other
117	SSTextArea	Test SSText Area	textarea	No	No	No	No	N/A
118	AssessmentDaysRemind	Days Until Assessment Reminder	single-select	No	No	No	No	N/A
119	AssessmentDaysReject	Days Until Assessment Rejection	numenc	No	No	No	No	N/A
120	AssessmentPassScore	Assessment Passing Score	single-select	No	No	No	No	Designate
121	AssessmentPrefScore	Assessment Preferred Score	single-select	No	No	No	No	Designate
122	AssessmentLanguage	Assessment Language	radio	No	No	No	No	Designate
123	AssessmentBatch1	Assessment Batch 1-US	single-select	No	No	No	No	N/A
124	AssessmentBatch2	Assessment Batch 2	single-select	No	No	No	No	N/A
125	AssessmentBatch3	Assessment Batch 3	single-select	No	No	No	No	N/A

AttachAssessments – this field displays all client assessments. It is best suited for environments without complex rules, ideally when only a single assessment is required for a req and all candidates, both internal and external, are required to take the assessment

AssessmentLanguage – this field determines whether the candidate must take the assessment in the locale of the gateway they’ve applied to (when the assessment is available in that locale) or if they will have the option to select the language of their choice. When the field is not present on the req, the system defaults to allowing candidates to select the language of their choice. As part of this functionality, only English titles for assessments will be displayed in 2xB and attached to the requisition. KAS determines which version of assessment will be given to the candidate, based on the req setting.

AssessmentPassScore (used only with AttachAssessments) – this field is used in tandem with the AttachAssessments field and Automation Manager Assessment trigger “Scoring Results.” This is best when only one assessment is required for the req, or, if multiple assessments are required, they share a similar cut score.

AssessmentPreferScore (used only with AttachAssessments) – same as above but candidate can be updated to a unique HR status based on having a preferred score rather than a passing score.

AssessmentDaysRemind – This is available for both AttachAssessments and for batches, and uses Automation Manager – Assessments-> Reminder Email. Candidates who have not completed ALL required assessments in the #days set per Req are sent a reminder email.

AssessmentDaysReject – Same as above. In this case the candidate is automatically updated to a new HR status if they do not complete all their assessments within the designated timeframe.

AssessmentBatch1 (only)

AssessmentBatch2

AssessmentBatch3

AssessmentBatch4

AssessmentBatch5

AssessmentBatch6 – If enabled for batches, up to 6 distinct batches can be attached to an individual requisition. This provides flexibility around launch methods. For example: Batch 1 may be the set of assessments required for external candidates when they apply on the TG, Batch 2 may be a different set that is required for internal candidates, Batch 3 may be for all candidates that move into a certain HR status.

Best Practice: Determine each batch’s launch method/purpose and rename the field accordingly so the end user can easily identify which candidates will be taking the assessments and when. For example, instead of “AssessmentBatch1”, rename to “TG Assessments – Internal”

Configure Candidate Forms

Two candidate forms are created for Kenexa Assessments; both are multiple/req/candidate.

- KAS Results
- KAS Overall Results (only with batches)

To ensure each User Type has the appropriate privileges, you can set the form attributes in Workbench **Tools > Forms > Candidate forms > Edit form attributes**. Note that many of the attributes are system defined and are not modifiable

***Database title** KASOverallResult

Title KAS Overall Result [English (US)]

Disclaimer [English (US)]

Search
HR Executive
Super User
HR Staff
Hiring Manager
QuickStart User

Output
Super User
HR Staff
Hiring Manager
QuickStart User
PR usertype

E-mail training@brassring.com Separate multiple addresses with commas.

***Approval process** No Parallel Sequential Rules-based **URL:** []

Cascade approver messages

***Form multiples** One per candidate
 Multiple per candidate
 Single per candidate/req combination
 Multiple per candidate/req combination

Send existing form in edit mode Yes No

Gateway candidate integration form? Yes No

Create form from TG IGNORE all "Required for form creation from TG" field settings
 When EVERY "Required for form creation from TG" field contains data
 When ANY "Required for form creation from TG" field contains data

Erase with candidates Yes No

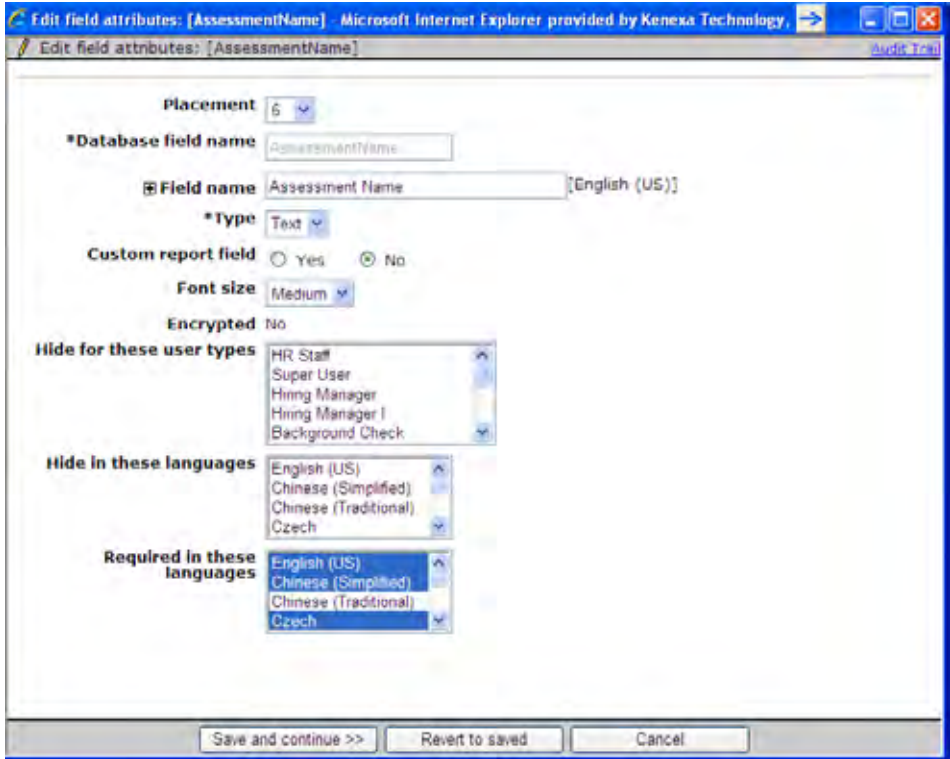
Form field alignment Default Left

Add / View / Modify My
HR Executive
Super User
HR Staff
Hiring Manager
QuickStart User

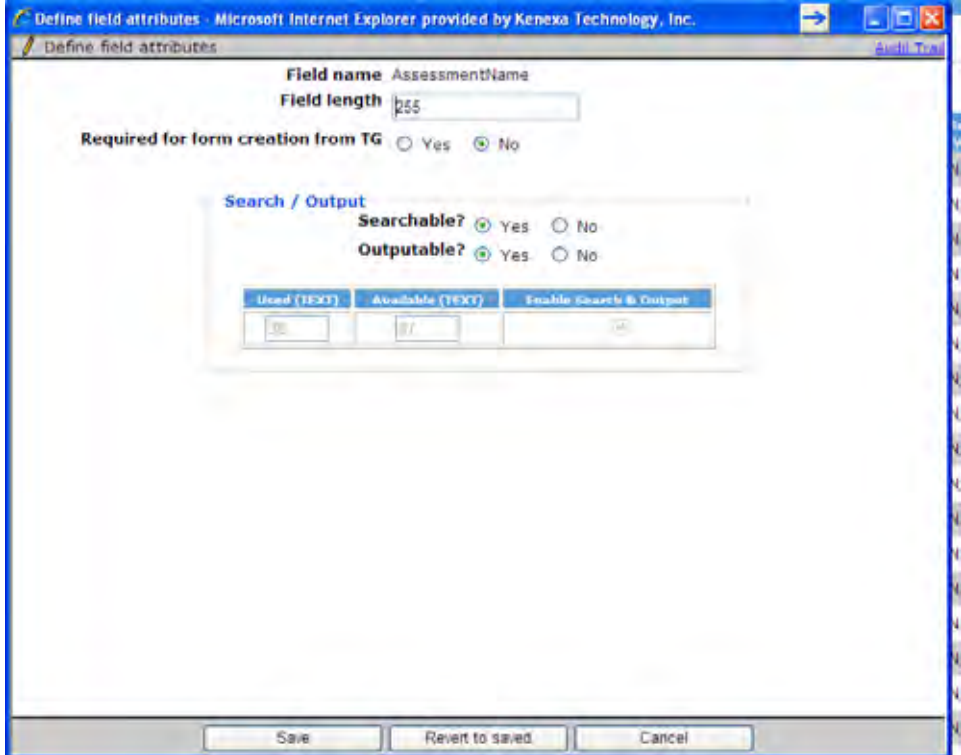
View all [HR Executive]

Save Revert to saved Cancel

Next determine which fields need to be visible to each User Type and update those that will appear in the Req grid to be outputable (**Tools > Forms > Candidate forms > Administer form fields > Edit field attributes**).



Click **Save and continue** to modify the field name to better suit the client's environment.



Fields available on **KAS Results**:

- Last Name
- First Name

- Requisition ID
- Assessment Batch Name – may be helpful if using batches, more likely will view this directly on form or in integration tab
- Assessment Code/ID – typically not meaningful to the 2xB user
- Assessment Name – Important to have and should be outputable if displaying results in grid
- AssessmentAdmin/RecruiterEmail
- Date of Assessment
- Elapsed Time
- Questions Correct – may be desired, more likely the “Results” or “2xB Band” field will be displayed
- Reporting Band – used for reporting, this contains the same custom banding text as “2xB Band” but is only in black/white so html tags are not included
- 2xB Band – if configured for banding, this should be outputable
- Results – can use this or simply display the band
- Link to Assessment Summary Page
- Numeric Results – mainly used for behind the scenes purposes
- T Score – rarely used; check with test consultant
- Z Score – rarely used; check with test consultant
- Raw Score – rarely used; check with test consultant
- Link to Assessment Report 2 – only for custom reports
- Link to Assessment Report 3 – only for custom reports

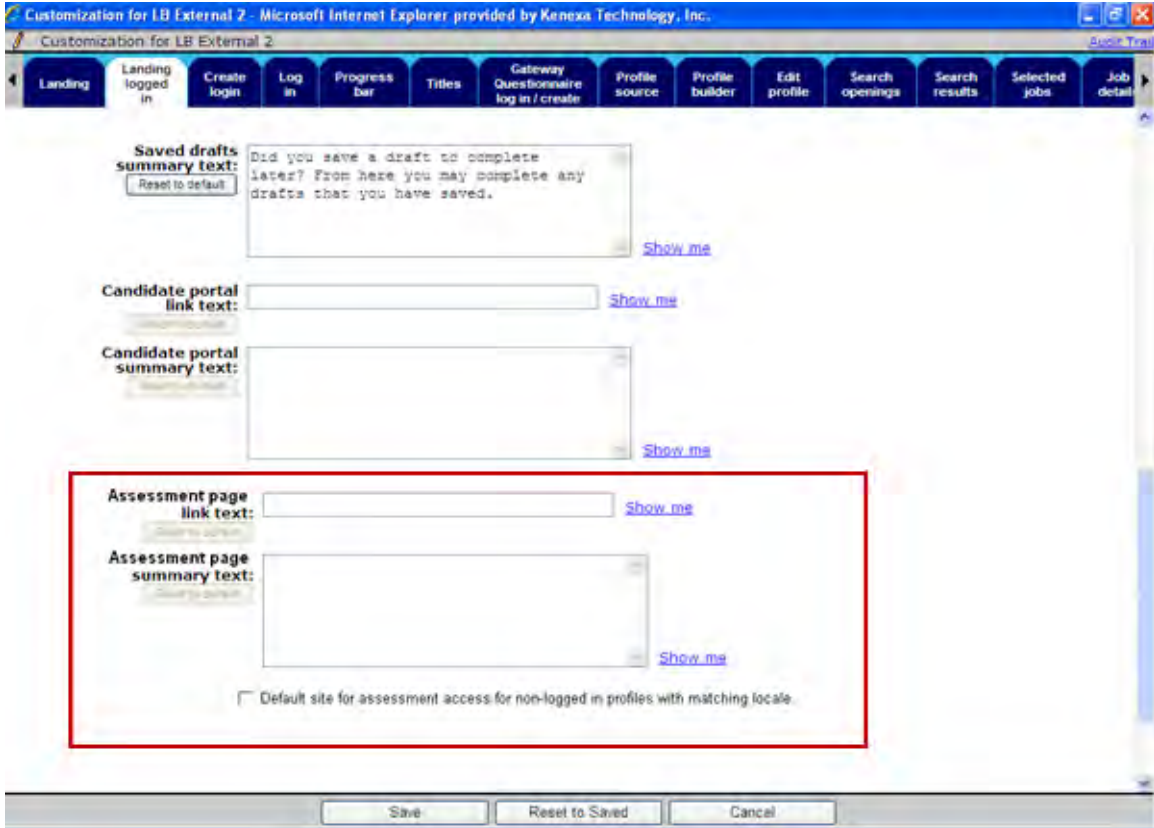
Fields available on KAS Overall Results:

- Date Created
- Candidate Last Name
- Candidate First Name
- Assessment Batch Name – needed to identify the batch
- Batch Band UI – this will only be populated when using the Overall Score feature, this text will appear in color on the UI if configured to do so
- Batch Band reporting – this is for reporting purposes; it does not need to be displayed on the grid. This will have the same text as the Batch Band UI but will not have color. This field can be used with Automation Manager “RAM” triggers to automatically update the candidate’s HR status
- Batch Score – this will display the system calculated overall score if desired
- HR Status Update – This field will display “Yes” if the candidate gets a passing score for all tests in the batch; a “No” if any test is not passed. This field can be used with Automation Manager” triggers to automatically update the candidate’s HR status.

[Customize Talent Gateway Text: Landing logged in Tab](#)

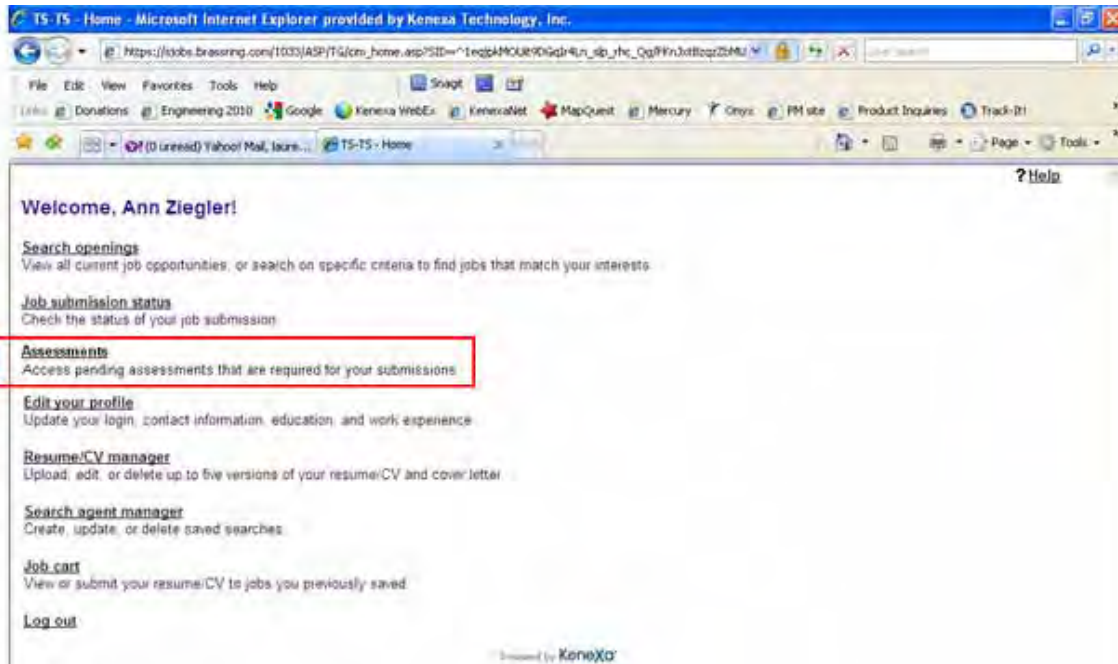
Configure the assessments-related text for the Talent Gateways in Workbench **Tools > Talent Gateways > Text customization > Edit**.

Configure the text for the link to the assessment page and the descriptive text provided for the link. Each locale must have a default TG set, in the event a candidate without a TG profile needs to access an assessment page.



- Assessment page link text field allows a maximum of 75 characters and does not support HTML.
- Assessment page summary text field allows a maximum of 4000 characters and HTML is supported.

The text entered on Landing logged in tab appears here:



Customize Talent Gateway Text: Notifications Tab

Configure the assessments-related text for the Talent Gateways in Workbench **Tools > Talent Gateways > Text customization > Edit.**

Customization for RohiniTEsting

Assessment invitation message: Based on your qualifications, we invite you to complete the next step in our organization's standard hiring practice by answering a few assessment questions for us. This important step may take anywhere from 5 to 15 minutes

Launch Assessment button: Continue Show me

Assessment invitation email message:

Assessment page title: Pending Assessments

Assessment page text - with assessments pending: (will be displayed when one or more assessments have not been completed)

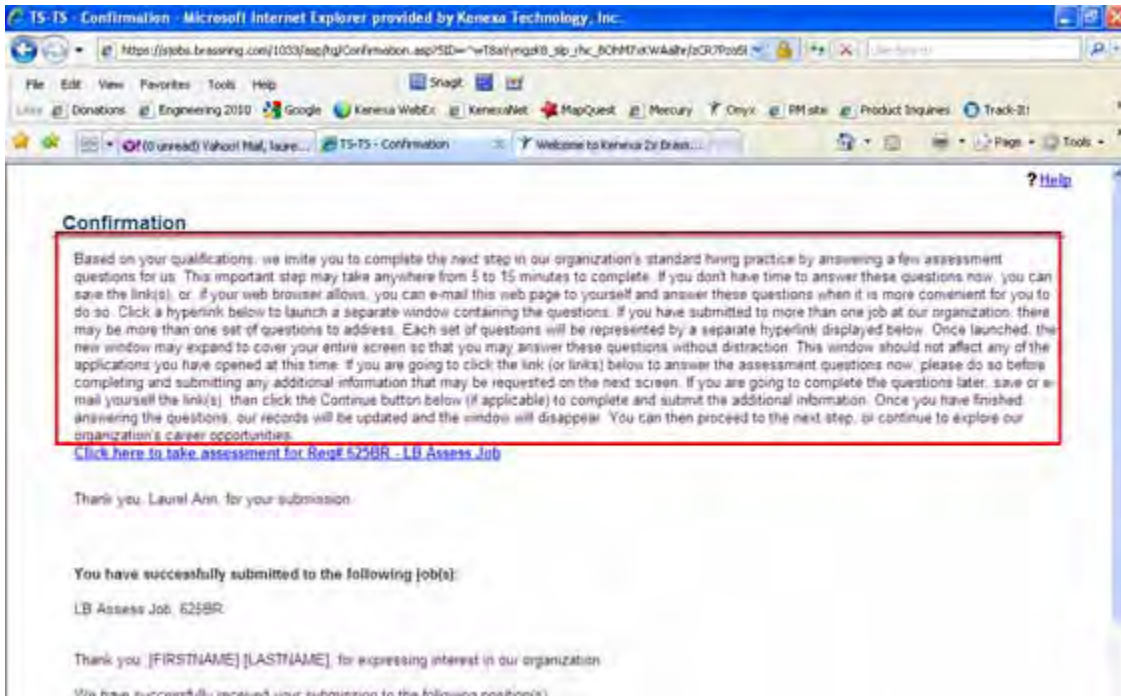
Assessment page text - no assessments pending:

Save Reset to Saved Cancel

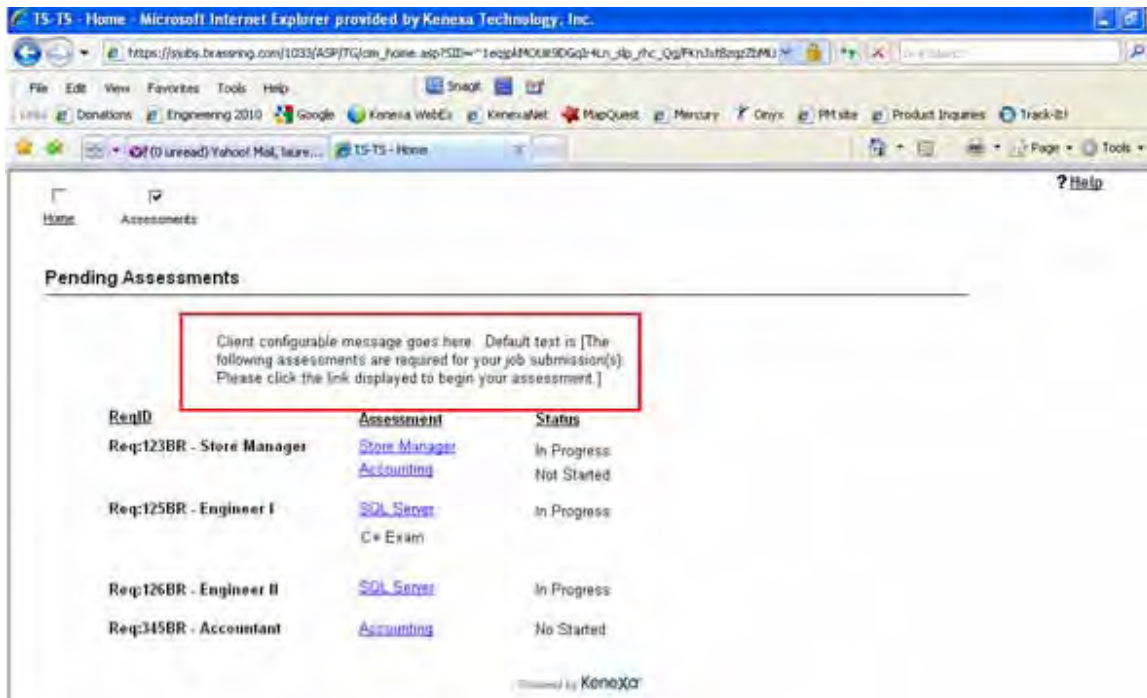
- **Assessment invitation message:** this is the text that appears on the confirmation page when the candidate is required to take an assessment. **Note:** if the assessment link needs to be displayed on the confirmation page, rather than launching via the Continue button, the following must be added where the link should appear: “[URL]”
- **Launch Assessment button:** this field can be used to add custom text to the button on the confirmation screen; this can help make it clear to the candidate that they have not truly completed their application process yet.
- **Assessment page title:** ****NEW** this field can be used to change the title of the TG-Assessment page** (default title is Pending Assessments)
- **Assessment invitation email message:** create text here if candidates should receive email invitations in addition to having the assessment provided via the TG. If there is no message entered an email will not be sent.
- **Assessment page text – with assessments pending:** this is the instruction text that displays on the TG-Assessment page. Candidates see the outstanding assessments for all requisitions they have applied to on this page. This text displays when there are outstanding assessments. The field allows a maximum of 4000 characters and HTML and tokens are supported.

- **Assessment page text – no assessments pending:** this is the same as above but displays when no assessments are required. The field allows a maximum of 4000 characters and HTML and tokens are supported.

This figure shows where the first field displays:



This figure shows where the last two fields display:



Add Assessment Widget to Gateway Questionnaire(s)

You must add the assessment widget to the confirmation page of the GQ in order for assessments to be offered to the candidate (in Workbench **Tools > Gateway Questionnaires > Administer sections/pages > Administer widgets > Add new widget**). If the “Always launch assessments” TG Admin setting is not turned on, then the GQ needs at least one scored question, and the minimum score to launch assessments must be entered on the site questions page.

Insert a Text widget on confirmation page. Click **Insert variable**, select **Assessment**, and **Save**.

Widget properties - Microsoft Internet Explorer provided by Kenexa Technology, Inc. [Audit Trail](#)

Widget properties

Question Text Graphic Complex Widgets

Gateway Questionnaire that is either stand-alone or for multiple requisitions at once

[Assessment] [English - United States]

Insert variable

Preview

Copy text ▼ Copy text ▲

Gateway Questionnaire for a single requisition

[Assessment] [English - United States]

Insert variable

Preview

Text Display Display text all at once in a non-scrolling pane Display text in a scrolling pane

Alignment Default Left Center Right

Save Clear Cancel

2x BrassRing Admin/Admin+

Who does this: 2x BrassRing Administrator

Admin/Admin+ menu items, including Communications Templates and so forth]

2x BrassRing User

Who does this: 2x BrassRing User(s). Users may have to have a specific user type or specific user type privileges assigned to them.

[Personalized configuration; for example, candidate and req grid columns, or search options]



Kenexa 2x BrassRing™ Supported Browsers

For the recruiter experience in Kenexa 2x BrassRing (2xB), the following platforms are supported*.

	IE 6.0	IE 7.0	IE 8.0	Firefox 3.0	Safari 4.0
Windows XP	Yes	Yes	Yes	Yes	Yes
Windows Vista	No	Yes	Yes	Yes	Yes
Windows 7	No	Yes	Yes	Yes	Yes
MAC OSX 10.4.4	N/A	N/A	N/A	Yes	Yes
MAC OSX 10.5	N/A	N/A	N/A	Yes	Yes

For Talent Gateways and Agency Manager, the following platforms are supported:

	IE 6.0	IE 7.0	IE 8.0	Firefox 3.0	Safari 3.0	Safari 4.0
Windows XP	Yes	Yes	Yes	Yes	Yes	Yes
Windows Vista	No	Yes	Yes	Yes	Yes	Yes
Windows 7	No	Yes	Yes	Yes	Yes	Yes
MAC OSX 10.4.4	N/A	N/A	N/A	Yes	Yes	Yes
MAC OSX 10.5	N/A	N/A	N/A	Yes	Yes	Yes

All browsers listed in the support grids above will be supported in all 2xB-supported languages

For Workbench, the following platforms are supported:

	IE 6.0	IE 7.0	IE 8.0
Windows XP	Yes	Yes	Yes
Windows Vista	No	Yes	Yes
Windows 7	No	Yes	Yes

For eLinks, the following email clients are supported:
Microsoft Outlook and Lotus Notes

Kenexa 2x Mobile is not phone-specific; a range of mobile devices are supported, including:
Smart phone (such as iPhone, Android, and Windows Mobile) with Javascript enabled
Blackberry with BOS version 4.6 or higher that have JavaScript support enabled

*These are the officially supported platforms, as of December 10, 2010. The listed browser/versions and operating systems/versions have been tested for use with our applications, but other combinations may work with our products.

		2xB	Agency Manager	Talent Gateway
Azerbaijani	Azerbaijan			X
Chinese (Simplified)	China	X	X	X
Chinese (Traditional)	Taiwan			X
Croatian	Croatia			X
Czech	Czech Republic			X
Danish	Denmark			X
Dutch	Netherlands	X	X	X
Dutch (Informal)	Netherlands			X
Dutch	Belgium			
English	United States	X	X	X
English	UK	X	X	X
English - US Govt	United States	X	X	X
English	Ireland			
Finnish	Finland			X
French	France	X	X	X
French	Canada	X	X	X
French	Belgium			
German	Germany	X	X	X
German (Informal)	Germany			X
German	Austria			
German	Switzerland			
Greece	Greek			X
Hungarian	Hungary			X
Hungarian (Informal)	Hungary			X
Italian	Italy	X	X	X
Japanese	Japan	X	X	X
Korean	Korea, South			X
Norwegian	Norway			X
Polish	Poland			X
Portuguese	Brazil	X	X	X
Portuguese	Portugal			X
Russian	Russian Federation	X		X
Serbian	Serbia			X
Slovak	Slovakia			X
Slovenian	Slovenia			X
Spanish	Spain	X	X	X
Spanish (Informal)	Spain			X
Swedish	Sweden	X	X	X
Turkish	Turkey			X
Total Locales		14	13	34
Total Languages		12	11	26

New User Interface – Enhancements

Enhancements have been added to the 2x BrassRing New User Interface (New UI). They include:

- Redesigned Talent Record with configurable “ribbon” section and Action Log
- Req panels with filtering by language, improved sorting options, previewing of details
- New All Reqs Pending Approval panel
- Panel grid displays with adjustable columns, automatic resizing
- Updated style option for “classic” user interface.

Product	<ul style="list-style-type: none">⌘ 2x BrassRing⌘ New UI⌘ Workbench Self-Service⌘ Talent Gateways	<ul style="list-style-type: none">⌘ Agency Manager⌘ Data Insight Tool⌘ SmartApproval⌘ Other
Visible Changes	<ul style="list-style-type: none">⌘ No – contact your CSC for implementation details.⌘ Yes – details in <i>Visible Changes</i> document sent for each release build.	
How do I get this feature?	<ul style="list-style-type: none">⌘ Automatic – see details below.⌘ Specific conditions required – see details below.⌘ Configuration required – see details below.	

Benefits

The new features add convenience and improved efficiency.

Feature Description

Enhancements added to the New UI include:

- [Redesigned Talent Record](#) with configurable “ribbon” section, expandable/collapsible sections, and Action Log section
- New [All Reqs Pending Approval](#) panel
- Req panels with [filtering](#) by language, improved [sorting](#) options, [previewing](#) of details
- Panel grid displays with [adjustable columns](#), automatic resizing
- Additional actions available on the [Candidate Results](#) panel
- [Updated style](#) option for “classic” user interface.

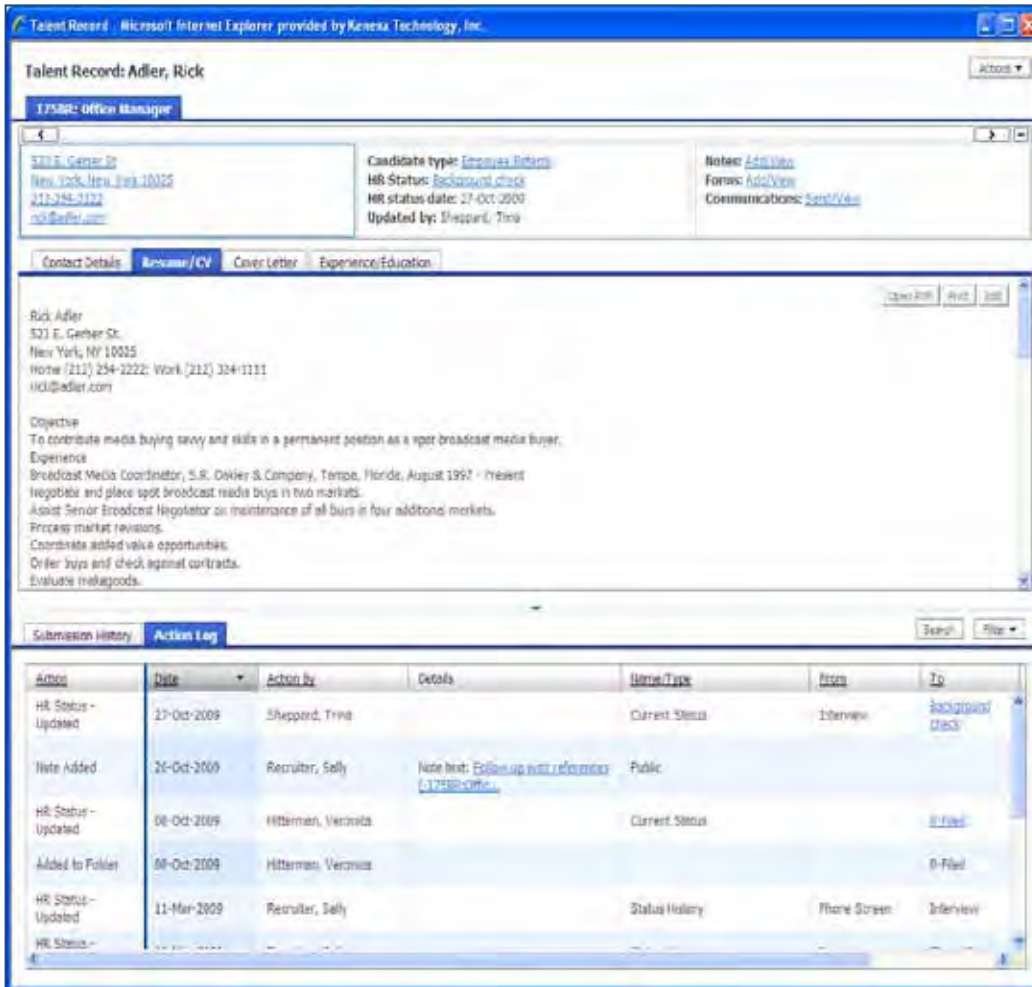
These features are described in the following sections.

Talent Record

The redesigned Talent Record continues the look and feel of the Portal page, and has some added-convenience features:

- Configurable “Ribbon” section that allows key information to always be in view.
- Expandable/collapsible sections that allow different areas, chosen by the user, to be in view at the same time.
- “Action Log” that displays all types of activities for the candidate in one list, while also allowing the user to access just the information that is needed.

When enabled for a user type, the redesigned version displays whenever users open a candidate Talent Record anywhere in 2xB, even from outside of their Welcome page.



Ribbon – key information always in view

Resume/CV section – configurable default tab

Action Log – all activity for the candidate in one list

Ribbon Section

The ribbon gives you quick access to commonly used actions and information.

- Drag and drop the individual “panes” to place the information you want where you need it most.
- Use the scroll arrow and minimize icons at upper right to control the display of information in the ribbon.
- Click the active links to access details or update information, such as Candidate type, HR Status, or Forms, in a child window.
- Select **Actions** to open the menu of actions.



Actions Menu

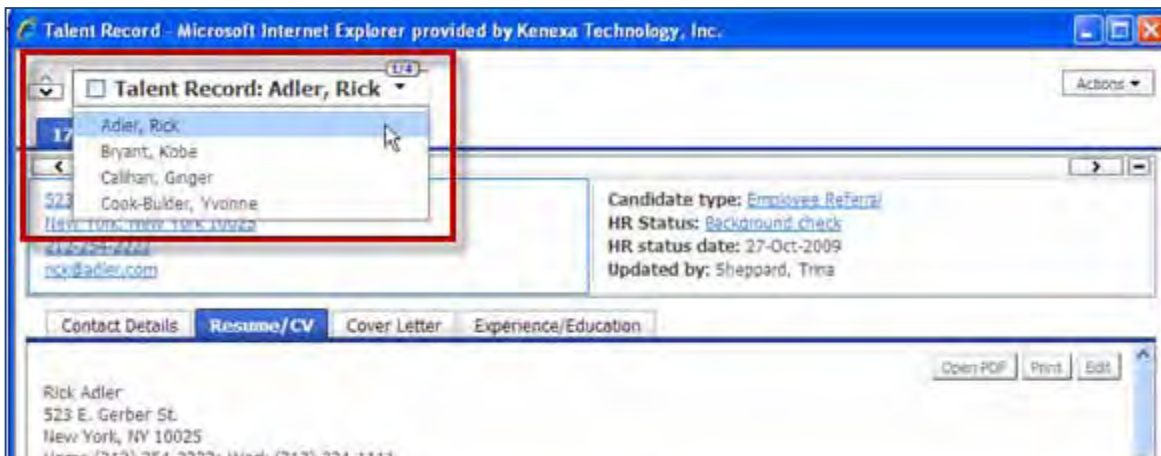
Actions shown when you click Actions can include the following (applicable features must be enabled for your organization, and you must have appropriate privileges).

- Send eLink
- Send Candidate Email
- Send Candidate Communication (such as an offer packet for candidate portal)
- Email Agency Contact
- Create Document
- Forward via Email
- File to Req
- File to Folder
- Send Interview Request
- Schedule Interview
- Upload Attachment
- Send to Event Manager
- Candidate Export
- Talent Match
- Run Assessment
- Retake Assessment
- Talent Gateway Usernames

Some actions will be disabled if viewing the Talent Record when not in a req folder (e.g., **Run Assessment**) or when multiple candidates are selected (e.g., **Candidate Export**).

Browse Mode

While viewing multiple Talent Records via the “Browse Multiple Candidates” action from the Candidates panel, you can browse through the candidates and select others, then use the Actions menu to act on selected candidates. Candidates selected for actions are indicated by a check mark in the current candidate’s checkbox (b) and/or a check beside the name in the dropdown.

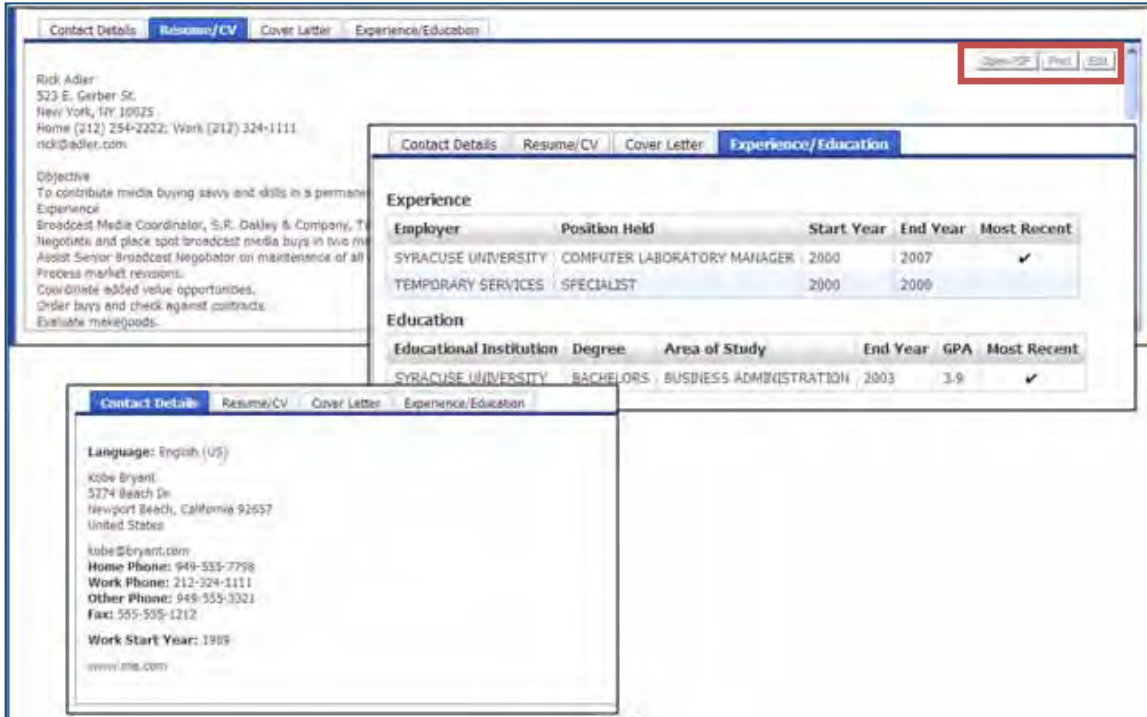


The arrow control under the browsing “number of candidates” indicator (to the right of the name being viewed) expands the list of candidates being browsed. To view another record, click the name. You can also navigate between records using the up/down arrows shown at the left of the current name.

Resume/CV Section

Several tabs are available besides Resume/CV, including Contact Details, Cover Letter, and Experience/Education.


- Default selected tab and available tabs are configurable by user type in Workbench
- Actions available on the tabs include **Open PDF** (if a PDF of the resume is available), **Print**, and **Edit** (if user has appropriate privileges).



Action Log

The Action Log displays all types of activities for the candidate (that you have privileges to view) in one list, while also allowing the user to access just the information that is needed. Pertinent information related to each action, such as date and who performed it, is also presented in the log table.

- Default is to display all actions for the candidate, with the most recent activity at the top.
- All columns except “Details” are sortable – click any underlined heading to sort by that column.
- Line items are “actionable” – right-click to see a menu of actions, such as View, Edit, Add form, Update HR Status, etc.
- Click **Filter** to select different types of actions for display – filter persists until you change it. You can filter by
 - **This folder** – displays only log events where the folder is the same as that from which the Talent Record is being viewed
 - **My Actions** – displays only log events where the **Action by** value is the logged-in user)
 - **Action Category** – displays only log events fitting the selected category.

Adjust the height of the log section with the top center section control: 

Action	Date	Action by	Details	Name/Type
HR Status - Updated	27-Oct-2009	Sheppard, Tina		Current Status
Note Added	20-Oct-2009	Recruiter, Sally	Note text: Follow up with references (-17588-091...	Public
HR Status - Updated	08-Oct-2009	Hitterman, Veronica		Current Status
Added to Folder	08-Oct-2009	Hitterman, Veronica		
HR Status - Updated	11-Mar-2009	Recruiter, Sally		Status History
HR Status - Updated				

Actions logged include:

- Added to Folder (first time a candidate is filed to a folder via move, copy, file, auto-file)
- Agency Submission, Association Added, Association Removed
- Assessment Sent, Completed
- Attachment(s) Added
- Candidate eLink – Sent, Viewed, Response
- Communication – Letter, Email, Document Posted, Document Packet Posted, Document Unposted, Document Packet Unposted, Agency
- Form Added, Edited, Approved, Declined
- Form eLink Sent, Viewed, Responded
- HR Status – Updated, Undo Status
- Interview
- Note Added,
- Referral – Submitted, Status Updated

Action Log Search

In the action log, click **Search** and select the desired radio button to:

- **Search All**– searches entire action log even if a filter or search is already in place
- **Search Within Results** – searches within the active results
- **Search Filtered** – searches the current filtered results only (filtered by action category, by actions you took yourself, or by folder).

You can also enter a string to search for – the search function has auto-complete when you enter a string. text in the Action Log that contains the text entered displays in a list below. As you enter more characters, fewer matching items may display. You can keep typing, or select something from the list.

Action	Date	Action by	Details	Name/Type
HR Status - Updated	27-Oct-2009	SH		HR Status - Updated
Note Added	20-Oct-2009	Recru		Current Status
HR Status - Updated	08-Oct-2009	Hitterman, Veronica		Status History
Added to Folder	08-Oct-2009	Hitterman, Veronica		Submission, System
HR Status - Updated	11-Mar-2009	Recruiter, Sally		Talent-Gateway-Limit Submissions Testing TG
HR Status - Updated				Public
HR Status - Updated				Current Status
HR Status - Updated				Status History
HR Status - Updated				Phone Screen
HR Status - Updated				Interview

Optimized Mode for Action Log

The Action Log will be “optimized” when a candidate is filed to more than 100 folders, to reduce the time required to display the full action log (as much as 2 minutes). In optimized mode, the Ribbon and middle sections load first, and you see a message in the log area.

This candidate is filed to more than 100 folders. The Action Log will only display actions related to the current folder [or “most recent” when viewing from outside a folder] to reduce load time. Click OK to proceed in this mode or Reload to load the page with the full results. (Please note that reloading with full results could take some time).

Select:

OK to optimize" the action log and load only high-count actions related to the current or most recent folder. High-count actions include those in the HR Status, Added to Folder, Communication, Forms, and eLinks categories. All other action categories will load even if tied to another folder. Additionally, Forms and Communications that are not tied to a folder will also load.

– OR –

Reload to load the full contents.

Persistence of loading mode does not apply; your choice does not affect loading the next Talent Record in optimized or normal mode. Once you load in optimized mode, the only way to get to the full mode is to close the Talent Record, reopen, and choose the desired option.



The "Search All" option in the search dialog is disabled in optimized mode.

Submission History

Submission history presents a table that lists up to the 11 most recent submissions. Each submission is represented by a row in the table, with the most recent submission titled 'Current' and each submission in descending order titled 'Duplicate1', 'Duplicate2', 'Duplicate3', and on through 'Duplicate10'.

Submission	Date Loaded	Codes
Current	18-Feb-2009 17:22:19	5030102, 530101, 530102, 28888R, TestRSAG
Duplicate 1	18-Feb-2009 17:22:19	0004, 530102, 12998R, MG-EN-L2-4830

Click the Submission link to display the resume associated with that submission in a pop-up window, where you can edit, print, or open a PDF of the resume if available.

Req Panels

Changes and improvements for req panels include:

- New req panel – All Reqs Pending Approval
- My Open Reqs and My Reqs Pending Approval panels now display the first 1000 records (previously they displayed the first 50).
- Filtering and Display by language
- More sorting options
- Previewing of req details
- Req security enforcement.

New All Reqs Pending Approval Panel

This new panel looks the same as the My Reqs Pending Approval, but includes all reqs with the status of Pending. This panel could be used as a way to let users easily view reqs requiring their approval, without their needing to be added to the Req team through the following options:

- When configuring the panel in Workbench, set “Show only reqs that require the user’s own approval in this panel” to limit the reqs that display in the panel.

–OR–

- User can sort on “Approve” column to always have reqs requiring their approval on top.

Job Title	Next Approver	Approve	Requisition	Date Created	Hiring Manager	HR Business Partner
TG 101	Panigrahi, Bishnu ()		12198R	01-Dec-2010	James, Jane	Challuri2, Aparna2
TG Job Approval	Panigrahi, Bishnu		12188R	30-Nov-2010	James, Jane	Glik, Tina
RFTEST	Florence, Recruiter (7815369999)		12168R	23-Nov-2010	Florence, Robin (7815305055)	Florence, Robin (7815305055)
RFTEST			12158R	23-Nov-2010	Florence, Robin (7815305055)	Florence, Robin (7815305055)
SA sept req LDP 51-B4	ChalluriUK, AparnaUK		12148R	02-Nov-2010	Zalpuri, Gautam	Challuri, Aparna
SA sept req LDP 51-B2	Challuri2, Aparna2		12128R	02-Nov-2010	Zalpuri, Gautam	Challuri, Aparna
RF Form Approval Test			12098R	01-Nov-2010	Florence, Robin (7815305055)	Florence, Robin (7815305055)

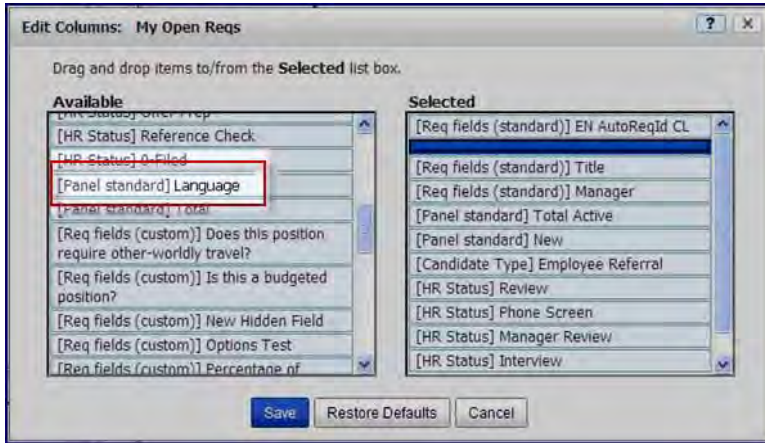
Language Filtering and Display on Req Panels

If your organization uses more than one language, the default behavior is to display only reqs that have been created in the user’s language. However, you can change this on the Filter menu to display reqs in any or all purchased languages. Your filter setting will persist until it is changed.

Req #	Title	Manager	Department	No. of Positions	Location/Division	Language	New	Total	Review	Phone
	Representative									
1748R	Assistant Manager	Manager, Joe	US Front Office	5	CA - San Francisco	English (US)	2	16	3	8
1738R	Office Manager	Manager, Joe	US Front Office	1	NY - New York	English (US)	25	31	12	2
1768R	Project Team Lead	Manager, Joe	US Production	7	CA - San Francisco	English (US)	1	13	11	2
1778R	Project Manager	Manager, Joe	US Research & Development	4	CA - San Francisco	English (US)	1	13	3	4
2048R	German Customer Service Rep	Manager, Joe	DE Support	1	DE Human Resources	German	0	0	0	0
2078R	FR QA tester	Manager, Joe		1	FR Front Office	French German	1	1	0	0

- To display Reqs in all languages, use the **Clear Selections** action.
- To see req details in a language listed in the column, click the desired language name link.

For organizations using more than one language, the new **Language** column indicates the languages in which a req has been created. To display it if you have privileges to do so, select **Edit Columns** from the **Display** menu, then select the language column on the Edit Columns widget.



You can also control the language that displays in the req grid. The default is to display in the user's language.

To change the language of the display:

1. Click **Display**.
2. Click **Language**.
3. Select the desired language.



Sorting for Req Panels

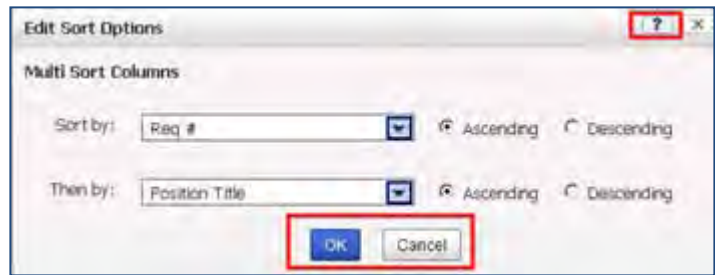
Additional columns are sortable on all requisition panels – My Open Reqs, All Open Reqs, My Reqs Pending Approval, All Reqs Pending Approval. Columns for which sorting was previously unavailable include:

- Req # (numeric order from high to low)
- Custom numeric and date fields (ascending upon first click)
- Text-based field types such as text boxes, radio buttons, and single selects (sort according to text only, with numbers and other characters ignored in the sort)
- Posting Options, Forms, Attachments (grouped by same icon, blanks appear first upon first sort)
- Approve (for My and All Reqs Pending Approval)

The Display menu on requisition panels automatically includes a new option called **Sort Options**. No privileges are required for this option – it is the only option available for users who do not have privileges to edit the panel display. For users with privileges; it appears under the Edit Columns option. Selecting it launches a req-panel version of the Edit Sort Options widget.



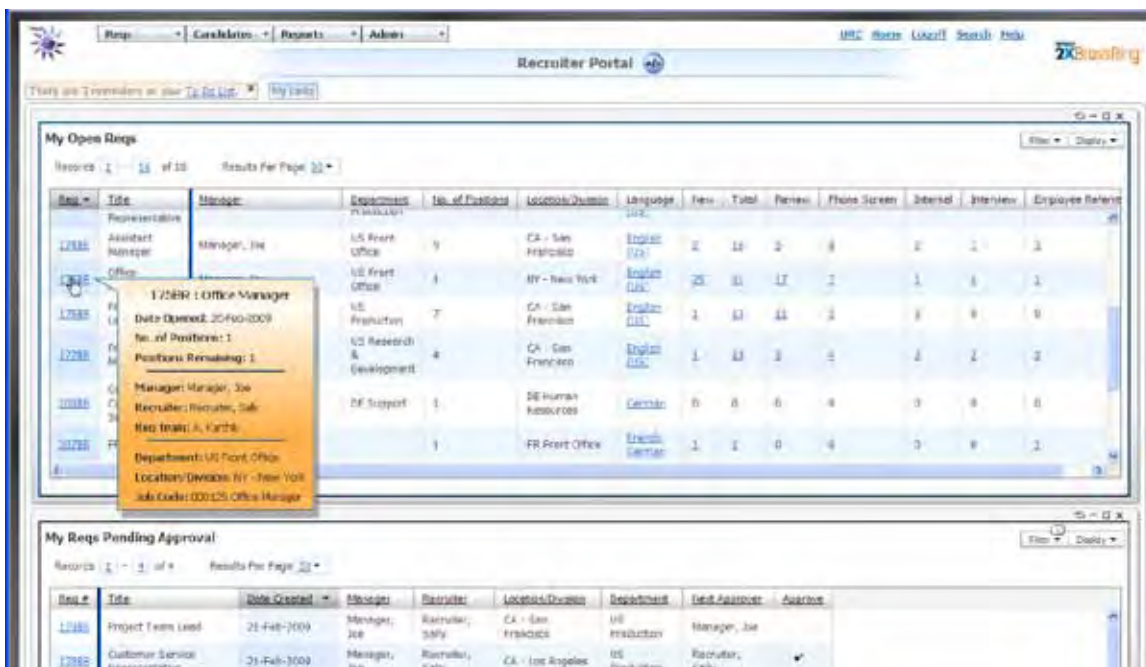
Selecting Sort Options launches the Edit Sort Options widget, which is similar to the existing widget for Candidate Results. Also includes a help button but does not have a Save as Default button.



Previewing Reqs on Req Panels

To preview req details, allow the mouse to hover over the req ID.

- Fields displayed in the preview are standard req fields and are currently not configurable
- If there is no data for a field or your organization does not use a field, it does not display at all
- Preview honors the “Hide by User Type” and “Hide by Language” settings
- Req Team displays the first 10 members. If more than 10, then “...”displays to signify partial information.



Column Resizing

You can now manually resize all Req panels and the Candidate Results panel. Simply click and drag the dividing line of a column to resize.

My Open Reqs

Records 1 - 16 of 16 Results Per Page 50

Req #	Title	Manager	Department	No. of Positions	Location/Division	Language	New	Total	Review	Phone Screen	Internal	Interview	Employee Referr
17488	Assistant Manager	Manager, Joe	US Front Office	5	CA - San Francisco	English (US)	2	16	5	3	2	1	2
17588	Office Manager	Manager, Joe	US Front Office	1	NY - New York	English (US)	25	31	17	2	1	4	1
17688	Project Team Lead	Manager, Joe	US Production	7	CA - San Francisco	English (US)	1	12	11	2	3	6	0
17788	Project Manager	Manager, Joe	US Research & Development	4	CA - San Francisco	English (US)	1	13	2	4	2	2	2
	German				DE Human								

Truncate Headers

Truncate Headers is an additional automatic option available through the Display menu. If the content in a column is narrower than the header text, this option automatically shrinks the columns to fit the contents and truncates the header text. This is a fast way to get a panel to fit into view. Select **Restore Default Widths** in the Display menu to return to the default view.

Headers before truncation:

All Open Reqs

Records 1 - 50 of 132 Results Per Page 50

Req #	Title	Department	Positions Remaining	Total	New	Employee Referral	Internal	0-F
20888	German QA Tester	DE Front Office	1	1	1	0	0	2
19588	Assistant Manager - 2		1	1	0	0	0	2
19488	Assistant Manager - 1		1	1	0	0	0	2
19388	Assistant Manager		1	2	2	1	0	2
18288	Product Manager	US Research & Development	1	0	0	0	0	0
18388	QA Manager	US Production	3	1	1	1	2	1
18088	Project Lead		2	1	1	0	1	0

Truncated headers:

All Open Reqs

Records 1 - 50 of 132 Results Per Page 50

Req #	Title	Department	P	T	N	E	I	O	R	I
20888	German QA Tester	DE Front Office	1	1	1	0	0	2	0	0
19588	Assistant Manager - 2		1	1	0	0	0	2	0	0
19488	Assistant Manager - 1		1	1	0	0	0	2	0	0
19388	Assistant Manager		1	2	2	1	0	2	0	0
18388	Product Manager	US Research & Development	1	0	0	0	0	0	0	0
18288	QA Manager	US Production	3	1	1	2	1	0	1	0
18088	Project Lead		2	1	1	0	1	0	0	0

Secure Reqs Enforcement

If the client setting for Secure Reqs is turned on, reqs that have been designated as "secure" reqs now display in the All Open Reqs and All Reqs Pending Approval panels only if the user has appropriate privileges or a "my reqs" relationship. Otherwise, none of the columns (such as Req ID, Title, or candidate counts) display for secure reqs.

In the Candidates Results panel, candidates that are filed into secure reqs display a Click Here link in the Last codes column instead of the req codes. The codes popup then displays codes related to a secure req only if the user has the "Access secure reqs" privilege or a "my req" relationship to the req.

Candidates in: 175BR : Office Manager

Records 1 - 22 of 27 Selected 0 Results Per Page 50

<input type="checkbox"/>	Name	Viewed	Notes	Forms	Candidate type	HR Status	HR status date	Last codes
<input type="checkbox"/>	Bryant, Kobe		+		Internal	Candidate Not Interested	30-MAR-2009	Click here
<input type="checkbox"/>	Callihan, Ginger		+		External	Phone Screen	02-APR-2009	Click here
<input type="checkbox"/>	Cook-Budler, Yvonne				External	Phone Screen	02-APR-2009	Click here
<input type="checkbox"/>	Fruhwirth, Chelsea				External	Interview	03-APR-2009	Click here
<input type="checkbox"/>	Garafolo, Janine				External	Phone Screen	30-MAR-2009	Click here

Secure Candidate Enforcement

If the client setting for Secure Candidates is turned on, candidates that have been designated as "secure" display according to the following rules.

All Open Reqs Panel

When the All Open Reqs panel is opened, if the user does not have the privilege "Access Secure Candidates" and secure candidates exist in a req with which the user does not have a "my req" relationship, then the following rules apply:

- When the panel is first loaded, all candidate counts INCLUDE secure candidates.
- Once the user clicks on a linked count that includes secure candidates and the Candidate Results Panel is launched, then the number is updated in the panel to reflect that actual number of candidates that the user is authorized to view.

Candidate Results Panel

When launched, this panel displays only those candidates that the user is authorized to view. If a candidate is secure and the user does not have the privilege to view secure candidates, that candidate does not display in the Candidate Results panel.

Talent Record

When a user has the "Access Secure Candidates" privilege or has a "my candidate" relationship to the candidate or the req that the candidate is filed into, then the user can view the secure candidate. When that secure candidate's Talent Record is opened, the following indicators show that the candidate is secure:

- Red lock icon to the left of the candidate name
- Candidate name in red text
- "Confidential" in red text to the right of the candidate name



Similarly, these same indicators appear in browse mode for the candidate that is currently being viewed (the dropdown list of names does not have a visual indication).

New Candidate Results Panel Actions

Additional actions are available from the Candidate Results panel's Actions menu:

- Update Candidate Type
- Add/Remove Agency Association (for client using Agency Manager)

Update Candidate Type

The **Update Candidate Type** action is now available on the Actions menu of the Candidate Results panel. Users can select one or more candidates of the same type (up to 50) for the update action.



Add/Remove Agency Association

With release 12.3 Build 0 in April 2010, Agency Manager was enhanced to support and manage agency referral rights on a per-req basis (see *Agency Managers – Referral Rights to Req* in the *Kenexa 2x BrassRing Product Update Guide R12.3* on the URC for full details). An additional field was added to the Agency Code screen called **Resume/CV referral rights by req**. This setting controls whether the agency owns the candidates across all reqs (setting=No), or just for the reqs for which they submitted candidates (setting=Yes). In the latter case, a candidate can be an Agency Referral for one req, but not another.

There were also changes to the way that agency associations are added and removed from a candidate through 2xB. From the **Candidate Results** panel (launched from My Open Reqs, All Open Reqs, or My Candidates), users can now use the **Add/Remove Agency Association** action that appears in the Actions menu for appropriately privileged users..



You can select one candidate and select the action to launch the **Add/remove current agency association** screen in a popup window (same process and screens as for classic 2xB).



Additionally, the Candidate Results panel now reflects/supports Agency Referral per-req referrals. The following screen shows changes to the **Agency referral** column of the Candidate Results panel (launched by the following panels: My Open Reqs and All Open Reqs).

¹ The column is now sortable (including when launched from the My Candidates panel).

² When launched from My Open Reqs or All Open Reqs (these changes do not apply to the panel when launched from My Candidates as consistent with classic functionality, since on classic pages candidates are not linked to reqs in this view):

- Icon displays when candidate is owned by an Agency for this req
- Icon displays when candidate is owned by an Agency in general
- Icon does not display if candidate is not owned by an Agency in general or for this req.

Candidates in: 175BR : Office Manager

Records 1 - 27 of 27 Selected 0 Results Per Page 30

<input type="checkbox"/>	Name	Viewed	Notes	Forms	Candidate type	HR Status	HR status date	Agency referral	Employee referral	Communications
<input type="checkbox"/>	Bryan, Kobe		+		Internal	Candidate Not Interested	30-MAR-2009			
<input type="checkbox"/>	Callihan, Ginger		+		Agency	Phone Screen	02-APR-2009			
<input type="checkbox"/>	Cook-Baizer, Yvonne				Agency	Phone Screen	02-APR-2009			
<input type="checkbox"/>	Endrey, Chelsea				Agency	Interview	03-APR-2009			
<input type="checkbox"/>	Garabito, Janina				Agency	Phone Screen	30-MAR-2009			

Updated Style Option on All Pages

The New UI style can be applied to all pages of 2xB. This provides for classic pages a “look and feel” that is similar to the new UI’s Welcome page.

Kenexa

Reqs Candidates Reports Admin

WRC Home Logout Search Help

Kenexa

Campus Recruiter

View all reqs: All stages Show Results 148

Showing reqs 1-50 of 1000 2 221

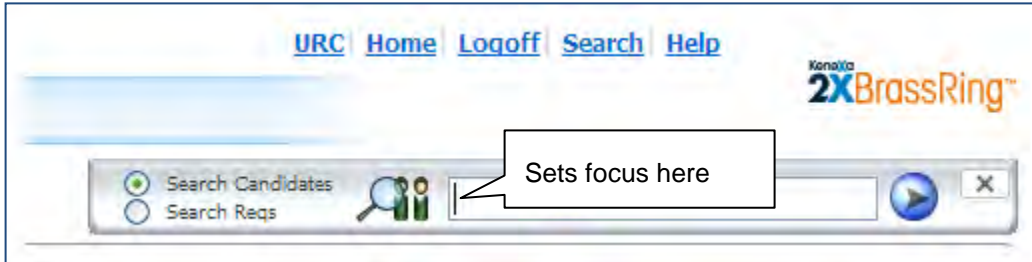
Select all	Req #/ID	Req. #/ID	Position Title	Posting options	Recruiter	Date created	Req Status	Total Candidates
<input type="checkbox"/>	100000	100000	General Manager		Kendall, Brad	12-Mar-2010	Open	0
<input type="checkbox"/>	100000	100000	Financial Analyst		Kendall, Brad	12-Mar-2010	Open	0
<input type="checkbox"/>	100000	100000	Audit Internship Positions		Howard, Justin	11-Mar-2010	Approved	0
<input type="checkbox"/>	100000	100000	Financial Control Group and ESG Operations		Howard, Justin	11-Mar-2010	Approved	0
<input type="checkbox"/>	100000	100000	Financial Analyst		Howard, Justin	10-Mar-2010	Pending	0
<input type="checkbox"/>	100000	100000	Finance Associate - Compensation		Howard, Justin	10-Mar-2010	Approved	0
<input type="checkbox"/>	100000	100000	Finance Associate - Compensation		Howard, Justin	09-Mar-2010	Closed	7
<input type="checkbox"/>	100000	100000	Electrical Engineer		Howard, Justin	09-Mar-2010	Pending	0
<input type="checkbox"/>	100000	100000	Electrical Engineer		Howard, Justin	09-Mar-2010	Closed	7
<input type="checkbox"/>	100000	100000	Electric Machine		Howard, Justin	08-Mar-2010	Closed	7

Quick Search Hot Keys

The following hot keys are supported from anywhere on the page (both Welcome Page and interior classic pages):

ALT+1: Opens the Quick Search controls if not already open, sets search mode to Search Candidates, and sets focus to the Quick Search textbox (indicated below by the yellow square 1).

ALT+2: Opens the Quick Search controls if not already open, sets search mode to Search Reqs, and sets focus to the Quick Search textbox.



If the Quick Search bar is closed, when the user opens it, focus is automatically be set to the Quick Search textbox for Candidates.

When the user changes the radio selection to/from Candidates and Reqs, focus will be set to the Quick Search textbox.

How Do Clients Get this Feature?

Some of the features for the New UI require configuration or panel configuration in Workbench Self-Service. Please contact your CSC or Certified Workbench User for more information about enabling these features.

Workbench Self-Service

Who does this: Certified Workbench User, Tier 4 and above

New Panel: All Reqs Pending Approval

Within the Panel Configuration section (**Tools > Settings > Panel configuration**), the “All Reqs Pending Approval” panel is available for configuration. The configuration of this panel is the same as the My Reqs Pending Approval panel.

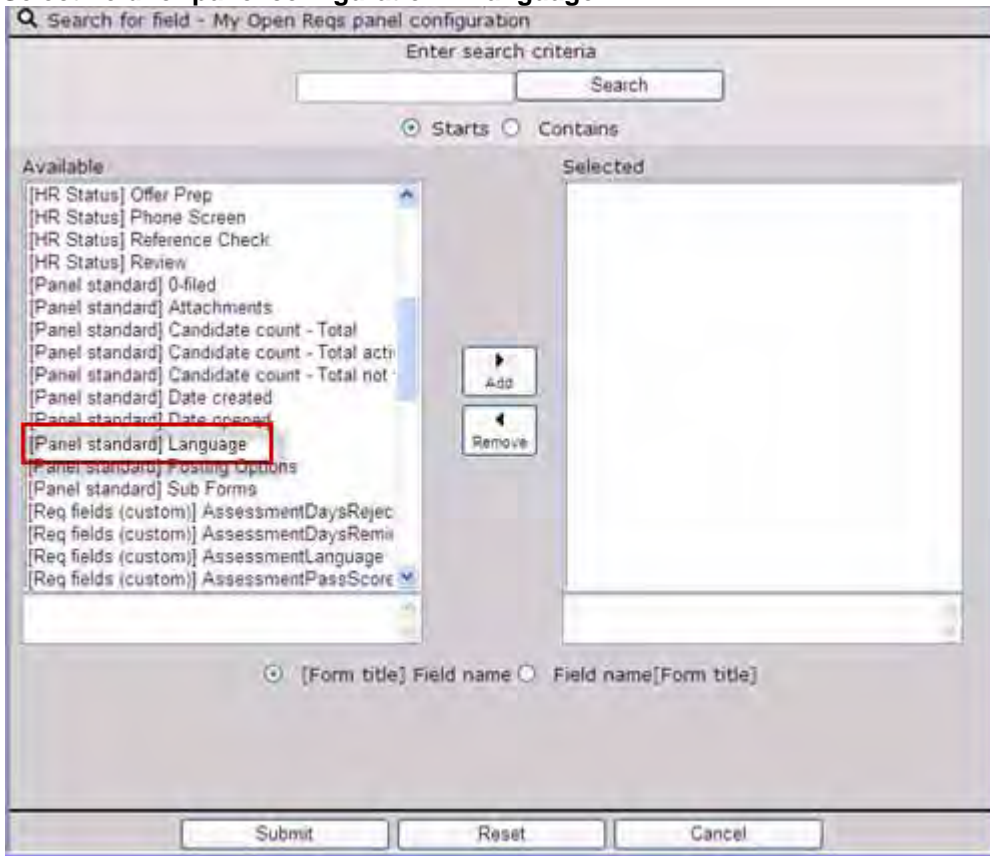
- Select the “Show only reqs that require the user’s own approval in panel” option to limit the reqs that will display in this panel
- When you are assigning this panel to a user type on the Panel Mapping page, the user must have All Reqs - View Pending privilege in order for the panel to be available for mapping.

Set up the desired user type mapping (**Tools > Users > User types > User type panel mapping**).

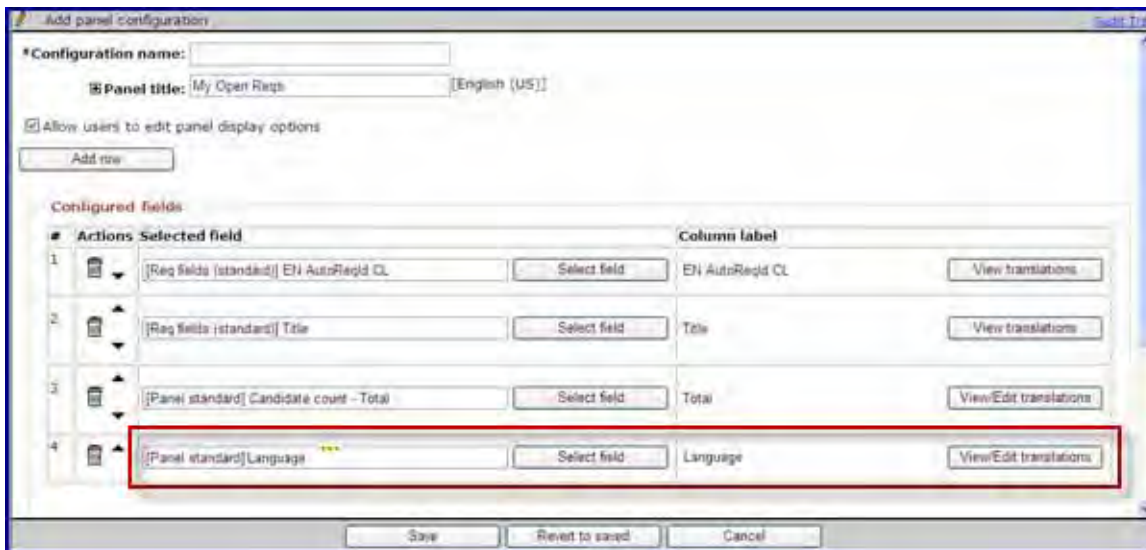
New Language Field Available for All Req Panels

Within the Panel Configuration section for any Req panel, when the “Select Field” option is selected, you will notice an additional option called “[Panel Standard] Language”. This field will only display if your organization has more than one purchased language.

Select field for panel configuration – Language



The following screen shows the panel configuration page when the new Language field has been selected. The navigation for this page is **Tools > Settings > Panel Configuration > Administer Config for any Req panel > Add new configuration | Edit existing configuration.**



New Setting: Screen Display Defaults

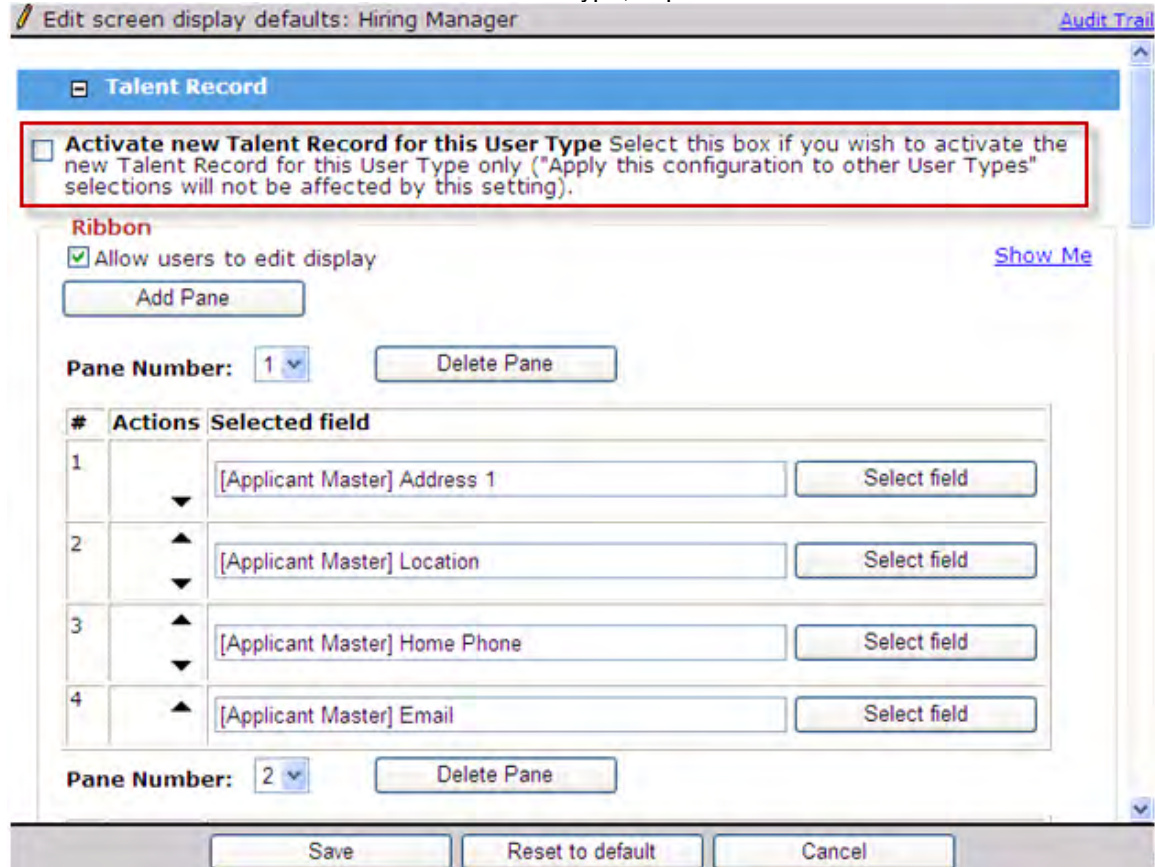
The redesigned Talent Record is turned off by default, but can easily be turned on by User Type using a new Screen Display Defaults option.

To enable the new Talent Record display:

1. Select **Tools > Users > User Types**. The new option **Screen Display Defaults** is available at the bottom of the Actions menu.



2. Select the user type that you would like to configure (the user type must have an active panel mapping), then select the **Screen Display Defaults** option. The Screen Display Defaults page appears.
3. To activate the new Talent Record for the User Type, expand the Talent Record section.



4. Select **Activate New Talent Record** check box.
5. To allow users to edit their display, check the box if necessary (it is checked by default).

6. Click **Save**.

This activates the new Talent Record with the default configuration of the Ribbon and Resume/CV sections.



The **Activate New Talent Record** setting is temporary, to allow clients a period in which to introduce it to users. Eventually it will be removed so that all New UI users will be defaulted to have the New Talent Record active.

You can also change the defaults for the following display characteristics. When finished, click **Save** to save your changes, or at any time click **Reset to default** to return to the default settings. Use the **Show me** links in each section to preview the Talent Record in a pop-up window.

Ribbon

- Re-order the panes – change the pane number in the dropdown, but note that pane numbers must be unique
- Add up to 25 panes (**Add Pane**) or delete panes (**Delete Pane**)
- Change the order of fields displayed within a pane (no more than 4 fields can be configured in one pane) – click the up or down arrow in the **Actions** column
- Change the fields displayed – click **Select field**

Resume/CV

- Suppress the display of tabs – uncheck the Display checkbox
- Change the default tab – uncheck the current default and select another

Screen Display Defaults – Resume/CV Section expanded

Edit screen display defaults: Hiring Manager Audit Trail

3	▲▼	[Panel standard] TG Score	Select field
4	▲▼	[Applicant Master] How Received	Select field

Resume/CV Section

Resume/CV Section [Show Me](#)

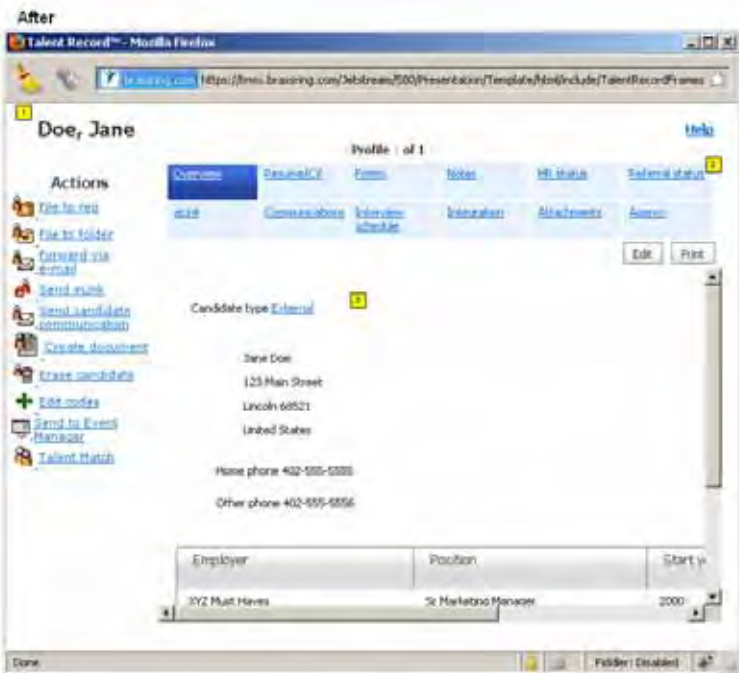
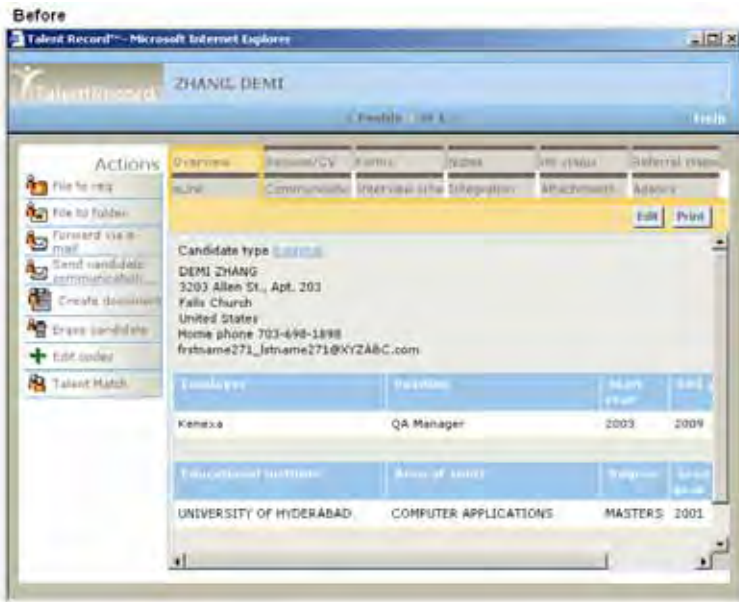
Tab Name	Display	Default
Resume/CV	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cover Letter	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Experience/Education	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Apply this configuration to other User Types: 11
Abbott
ABNewUser
AG - NO Agy Contact details

Save Reset to default Cancel

Use **Apply this configuration to other User Types** section to quickly update other user types as well. However, this applies only to the configuration and NOT to activating the new Talent Record.

Object Table



Req Fields – Additional Custom Text Fields Allowed

The maximum number of text custom req fields allowed has been increased from 50 to 150.

Product	<ul style="list-style-type: none"> ⌘ 2x BrassRing ⋮ New UI ⌘ Workbench Self-Service ⋮ Talent Gateways 	<ul style="list-style-type: none"> ⋮ Agency Manager ⋮ Data Insight Tool ⋮ SmartApproval ⋮ Other
Visible Changes	<ul style="list-style-type: none"> ⌘ No – contact your CSC for implementation details. ⋮ Yes – see the <i>Visible Changes</i> document sent out for each release build. 	
How do I get this feature?	<ul style="list-style-type: none"> ⌘ Automatic – see details below. ⋮ Specific conditions required – see details below. ⋮ Configuration required – see details below. 	

Feature Description

The maximum number of text custom req fields allowed has been increased from 50 to 150. This limit covers all mappable fields other than date and numeric fields. In Workbench, certified users can now designate a maximum of 150 fields per language as **Searchable** and **Outputable** when defining text custom req fields.

How Do Clients Get this Feature?

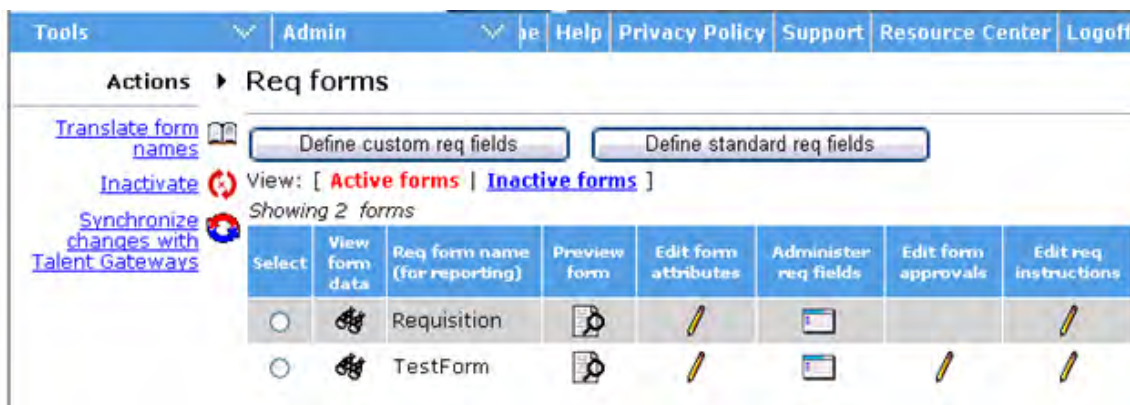
This feature is available automatically without configuration.

Workbench Self-Service

Who does this: Certified Workbench User, Tier 1 and above

You can now have up to 150 searchable and outputable custom text fields for use on req forms and reports.

Access custom req fields in Workbench via **Tools > Forms > Reqs > Req forms**. To add a new one, select **Define custom req fields**.



On the **Define new custom req field** screen, add information for a new text type field and click **Save and continue>>**. The **Define field attributes** page appears.

Define field attributes [Audit Trail](#)

Field name StarfleetSquadron
 Field length

Search / Output

Searchable? Yes No
 Outputable? Yes No

Used (TEXT)	Available (TEXT)	Enable Search & Output
<input type="text" value="11"/>	<input type="text" value="139"/>	<input type="checkbox"/>

Field associations

Enable association Parent Child

 Display full list with default selection

If you select **Yes** for either **Searchable** or **Outputable**, click the **Enable Search/Output** button. You map fields to the Verity database in the **Enable Search & Output** window to make fields searchable. Workbench displays the number of fields selected and available for each language. You can now designate a maximum of 150 fields per language as **Searchable** and **Outputable**.

Reqs Fields – No. of Positions and Positions Remaining

The **No. of Positions** standard req field can now be made non-editable by user type, and **Positions Remaining** can be hidden by user type.

Product	<ul style="list-style-type: none">⊖ 2x BrassRing<ul style="list-style-type: none">⋄ Agency Manager⋄ New UI⊖ Workbench Self-Service<ul style="list-style-type: none">⋄ SmartApproval⋄ Talent Gateways⋄ Other
Visible Changes	<ul style="list-style-type: none">⊖ No – contact your CSC for implementation details.⋄ Yes – details in <i>Visible Changes</i> document sent for each release build.
How do I get this feature?	<ul style="list-style-type: none">⋄ Automatic – see details below.⊖ Specific conditions required – see details below.⋄ Configuration required – see details below.

Benefits

This feature allows accounts who do not use multi-position reqs to simplify the process of adding reqs for their recruiters.

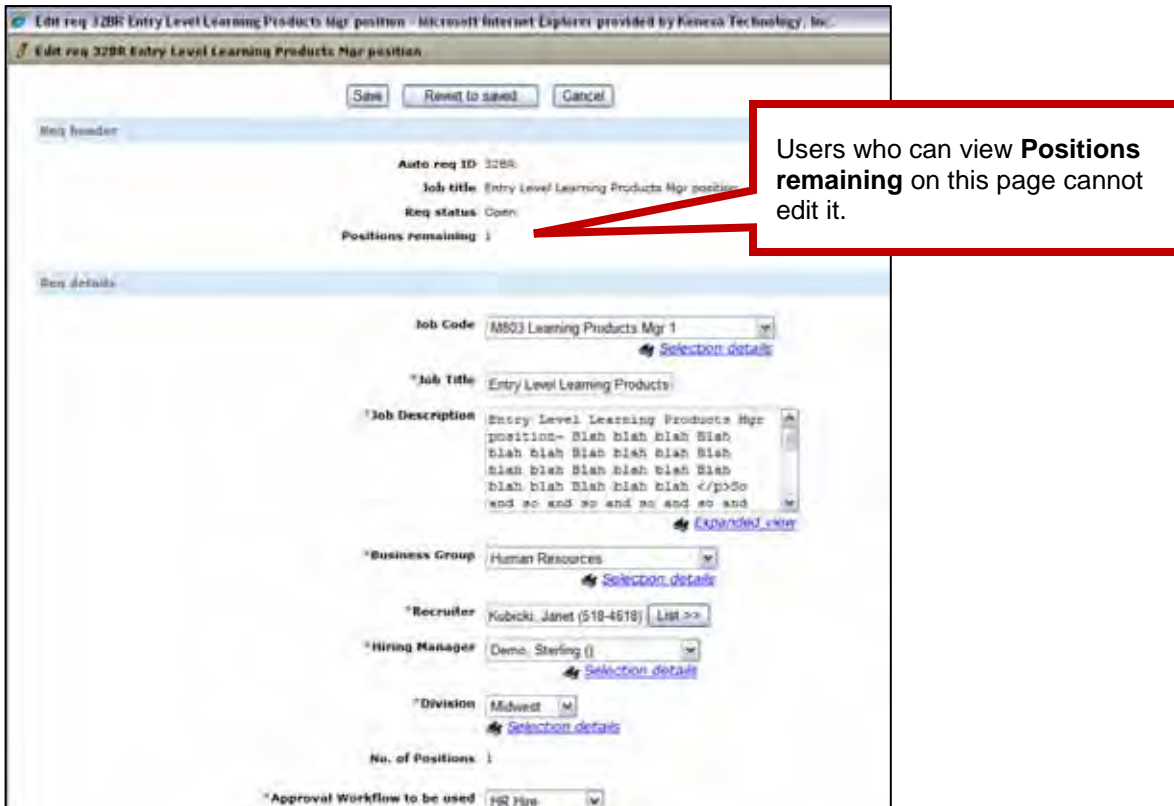
Feature Description

Workbench Self-Service users can now make the **No. of Positions** standard req field non-editable for 2xB user types, and can hide the **Positions Remaining** field. These settings apply to all reqs created with all req templates because these are standard req field settings.

2xB user types for whom the field is non-editable will see the **No. of Positions** field as non-editable when adding or editing reqs, including when editing via eLink.



2xB user types for whom **Positions remaining** is hidden will not see this field in the Req header section when viewing or editing a req, including when editing via eLink. For those who can see the field, it is displayed as a non-editable field on the edit page. The **Positions remaining** field is not visible when users are adding a req, regardless of its field setting.



How Do Clients Get this Feature?

This feature is controlled by new settings in Workbench Self-Service.

Workbench Self-Service

Who does this: Certified Workbench User, Tier 1 and above

Tools > Forms > Reqs > Req forms > Define standard req fields

To make the **No. of Positions** field non-editable:

1. Click the **Edit field attributes** icon for **No. of Positions**.
2. Select the desired user types for the **Non-editable for these user types** field.
3. Save your changes.

Edit standard Req fields - Microsoft Internet Explorer provided by Kenexa Technology, Inc.

Edit standard Req fields [Audit Trail](#)

Placement 9

Default label No. of Positions

Custom label No. of Positions [English (US)]

Field type text

Posting interface mapping None

Font size Medium

Hide for these user types Not applicable, this field will display for all users who have access to view this requisition.

Non-editable for these user types

- HR Executive
- Super User
- HR Staff
- Hiring Manager
- QuickStart User

Show in these languages English (US)
French
German

Required for these user types This field will be required for all users who have access to view this requisition.

Required in these languages English (US)
French
German

Field associations

Enable association Parent Child

Display full list with default selection

To hide the **Positions Remaining** field:

1. Click the **Edit field attributes** icon for **Positions Remaining**.
2. Select the desired user types for the **Non-editable for these user types** field.
3. Save your changes.

Edit standard Req fields - Microsoft Internet Explorer provided by Kenexa Technology, Inc.

Edit standard Req fields [Audit Trail](#)

Placement

Default label Positions Remaining

Custom label [English (US)]

Field type text

Font size Medium ▼

Hide for these user types

- HR Executive ▲
- Super User
- HR Staff
- Hiring Manager
- QuickStart User ▼

Hide in these languages English (US)
French
German

Required for these user types Not applicable, this field will not be required for any users.

Not Required in these languages English (US)
French
German

Field associations

Enable association Parent Child

Display full list with default selection

Reqs – JCDD Populating Hidden Fields at Creation

When a field is “hidden” from a 2xB user creating a req, Job Code Default Data will now populate the field. That user will still not see it, but the data will be available for other user types (with access) and for other applications.

Product	<ul style="list-style-type: none">⌘ 2x BrassRing⋮ New UI⋮ Workbench Self-Service⋮ Talent Gateways	<ul style="list-style-type: none">⋮ Agency Manager⋮ Data Insight Tool⋮ SmartApproval⋮ Other
Visible Changes	<ul style="list-style-type: none">⋮ No – contact your CSC for implementation details.⌘ Yes – see the <i>Visible Changes</i> document sent out for each release build.	
How do I get this feature?	<ul style="list-style-type: none">⌘ Automatic – see details below.⋮ Specific conditions required – see details below.⋮ Configuration required – see details below.	

Benefits

This feature allows req data that should not be modified by a restricted user type (such as recruiters) to be available for other user types and for applications such as an HRIS integration.

Feature Description

With this enhancement for organizations using Job Code Default Data (JCDD), when a field is “hidden” from a 2xB user creating a req, JCDD populates the hidden field when data is available. The data remains hidden from that user, but is available for other user types (with access) and for other applications.

The hidden fields will be populated in the database when a req is created and saved by one of the following methods:

- Add req with JCDD
- Save as new req

JCDD values are saved only for “active” Req field options.

Add a new req using **Reqs > Add new req** or **Add new req** from **Actions** when viewing Req grid. JCDD data is saved when the user selects **Save as Draft** or **Save and continue**.

Add New Req

Department [expanded view](#)

Selection details

*Group ID

*Recruiter [Selection details](#)

*Manager

Location@#5@#5

*No. of Position

*Req Type Exempt Non-Exempt

*Requisition Team

* Notify upon approval completion [Selection details](#)

Advertising Costs

Sign-on Bonus

Relocation Costs

HR Department Recruiter Costs

External/Agency

Referral Bonus

* = required field

Save as new req from the Req details page or from Reqs action item.

Save as New Req

Save as new req 15344UR EN Clinical Admin Asst 1

English (US) Spanish French Japanese

Req details

Job Code [Selection details](#)

*Title

*Job Description [Expanded view](#)

Department [Selection details](#)

Limitations and Known Issues

Req Field Association (RFA) will not be supported when populating hidden field values. For example, if a user from whom child field values are hidden changes a parent field, the child field values are not updated. That is:

JCDD1 default values are:

ParentField1 value = **abc**
ChildField1 value=**xyz**

For Recruiter1, ParentField1 is visible and ChildField1 is hidden.

- Recruiter1 creates req based on JCDD1
- Sees ParentField1 value as **abc**
- Changes ParentField1 value to **efg** that has **uvw** as ChildField1 value but ChildField1 is hidden
- Recruiter1 saves the **req**
- Application populates JCDD value of **xyz** to ChildField1

How Do Clients Get this Feature?

This feature is available automatically without configuration to accounts using JCDD.

Reqs – Posting to Talent Gateways and Agency Managers

New buttons on the **Edit posting options** page enhance the posting process when 2x BrassRing users edit posting options.

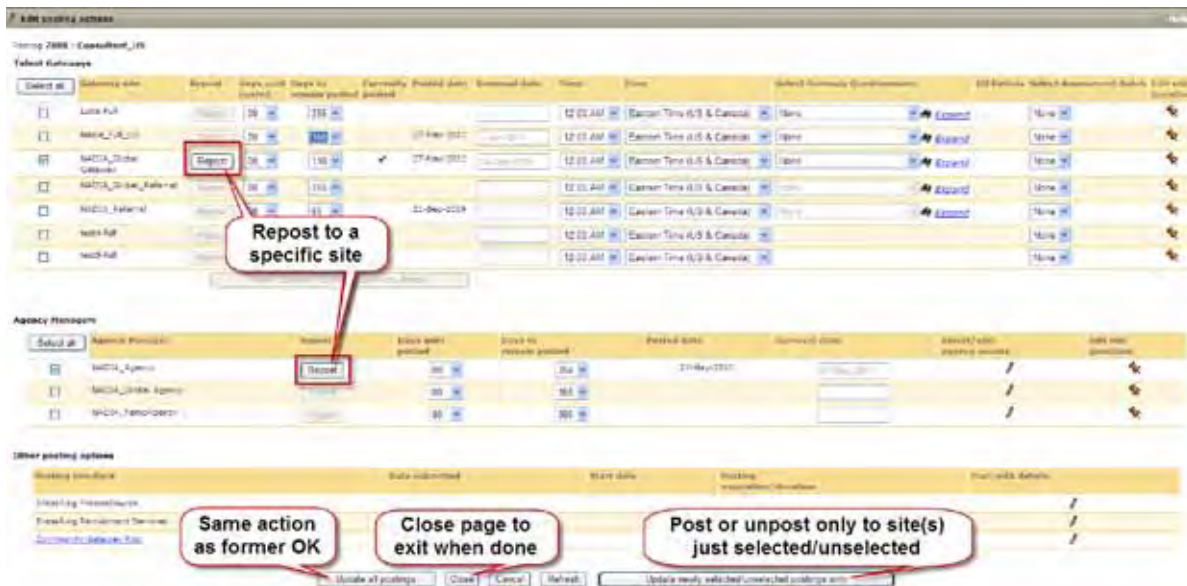
Product	<ul style="list-style-type: none"> ⌘ 2x BrassRing ⋮ New UI ⋮ Workbench Self-Service ⋮ Talent Gateways ⋮ Agency Manager ⋮ Data Insight Tool ⋮ SmartApproval ⋮ Other
Visible Changes	<ul style="list-style-type: none"> ⋮ No – contact your CSC for implementation details. ⌘ Yes – details in <i>Visible Changes</i> document sent for each release build.
How do I get this feature?	<ul style="list-style-type: none"> ⌘ Automatic – see details below. ⋮ Specific conditions required – see details below. ⋮ Configuration required – see details below.

Benefits

Allows users to update postings selectively on Talent Gateway/Agency Manager sites.

Feature Description

New **Repost** and **Update newly selected/unselected postings only** buttons on the “Edit posting options” page provide more flexibility to the posting process when 2x BrassRing users edit posting options. The **OK** button has also been relabeled (it performs the same as before).



Buttons on the “Edit posting options” page available to 2x BrassRing now include:

Repost – Individually enabled for each site to which the requisition is already currently posted. You click a selected Talent Gateway (TG) or Agency Manager (AM) site’s corresponding **Repost** button to repost to that particular site only. (However, you will remain on the “Edit posting options” page after using the Repost button, and can then Repost for additional sites, individually, if you wish. You can close the page when you’re done using a new **Close** button.) When you use **Repost**, any posting dependencies are enforced.

Use, for example, when you want to:

- Update individual sites.

- Move the req to the top of the site's job list.
- Extend a req's posting on a site when you've been notified by Automation Manager that it's about to expire.

Update all postings (previously labeled "OK," performs the same actions) – Posts or reposts the req to all selected (checked) sites, with updates for those you edited, and resets the "Posted date" for all selected. It removes the req from any site to which it is already posted if you uncheck that site before you click the button.

Use, for example, when you want to move the req's position to top of the job list on all sites where it's posted.

Close – Exits the page.

Use, for example, after you've used the Repost button, since you remain on the Edit posting options page afterward (in case you have additional edits/reposts to perform).

Cancel – Exits the page. This does not save any uncommitted changes, such as selections or edits that you made but then did not save. (Clicking the Repost button commits that action – any reposts performed via Repost buttons take place immediately and clicking Cancel afterward does not affect them.)

Use, for example, to exit the page without saving any changes.

Refresh – Recalculates and displays an updated "Removal date" when you edit the posting period ("Days until posted" or "Days to remain posted"). (Button does not refresh the posting, simply updates the posting options page.)

Use, for example, to doublecheck that the removal date is what you intended.

Update newly selected/unselected postings only – Posts the req only to newly-selected TGs and AMs (those you have just checked) and resets the "Posted date" for them, without resetting the "Posted date" or reposting to sites that had previously been posted to (those already checked when you opened the page). Removes the req from any site to which the req is already posted if you uncheck that site before clicking the button.

Use, for example, when you want to post a req to additional site(s), or remove posting(s), without affecting the "Posted date" field or position in the job list on other sites where the req is already posted.



Users editing site questions must save their changes on the **Edit site questions page** AND select a posting option on this page (**Edit posting options**) to post the changes out to the TG or AM.

Use Scenarios

Scenario 1 – Repost to one selected site

Recruiter wants to update an option for one site to which a req is already posted and repost.

1. She makes a change to **Days to remain posted** for the particular Talent Gateway or Agency Manager and on the **Edit posting options** page.
2. She clicks the **Repost** button next to the site for which she made the changes.

The system:

- Resets the days in "Days to remain posted" in drop down list (per Recruiter's selection).
 - Updates the "Removal date" field on the page.
 - Updates "Date updated" on the selected site, moving the req to the top of the list (users will see updated "Posted date" when Edit posting options page is next opened).
 - Displays 2xB confirmation message.
3. She clicks **OK** to close the confirmation
 4. She clicks **Close** to exit the **Edit posting options** page.

Scenario 2 – Update all postings

Recruiter wants to apply a change to the checked sites where the req is posted, post to one additional site, and remove the posting from one site.

1. He makes the change to **Days to remain posted** on the **Edit posting options** page for the desired sites.
2. He checks an additional site where he wants to post the req and sets the options for that site.
3. He unchecks the site where he no longer wants the req posted.
4. He clicks the **Update all postings** button.

The system:

- Resets the days in “Days to remain posted” in drop down list (per Recruiter’s selection) for the edited selected sites.
 - Updates the “Removal date” field for all checked sites where the req was already posted, whether they were edited or not.
 - Updates “Date updated” on the selected sites, moving the req to the top of the lists.
 - Posts to the newly-selected site to which the req had not yet been posted.
 - Removes the posting for the site he unchecked.
 - Displays standard 2xB confirmation message.
5. He clicks **OK** to close the confirmation.

Scenario 3 – Update newly selected/unselected postings only

Recruiter wants to post a req to one additional site without affecting the “Posted date” field on other sites where the req is already posted. She also wants to remove the posting from one site.

1. She selects (checks) the additional site and sets posting options on the Edit posting options page.
2. For site questions, she selects **Edit site questions**, and on the **Talent Gateway site questions** page, she sets site questions and scores and clicks **Save**.
3. Returned to the **Edit posting options** page, she unchecks the site from which she wants to remove the posting.
4. She clicks **Update newly selected/unselected postings only**.

The system:

- Posts to the newly-selected site.
 - Unposts from the newly-unchecked site.
 - Sets the posting/removal date fields for the updated sites (newly-selected) but does not update any fields for other sites where the req is posted.
 - Displays standard KRB confirmation message.
5. The user clicks **OK** to close the confirmation.

The following table further illustrates various posting actions.

To do this:	Can select this action:	Actions taken as a result:
Add and post new req	Update all postings	Same as OK button, posts req out to all selected gateways.

To do this:	Can select this action:	Actions taken as a result:
Edit a posted req	Repost (only visible once a req is already posted) (Click Close when done.)	For the gateway to which you select Repost button: <ul style="list-style-type: none"> • Updates "Posted date" on the Posting options page • Updates any other changes to the Posting options page (e.g., Select Gateway Questionnaire, etc) • Updates any changes to the Edit site questions page (including Add a question) • Confirmation displays after Repost.
	Update all postings	Same as OK button, posts req out, with edits, to all selected gateways.
	Update newly selected/unselected postings only	Affects only the gateways you have just selected or unselected <ul style="list-style-type: none"> • Posts req to a newly-checked gateway • Unposts req from a newly-unchecked gateway
Edit site questions	Save (on Site questions page)	When saving any changes to the site questions page a new warning message displays: "Clicking the Save button will not post changes." The Save action saves your site questions changes, but no changes to postings take effect until you post the req again using one of the posting actions on the Posting options page.



The Repost button is independent of the buttons at the bottom of the Posting options page.

How Do Clients Get this Feature?

This feature is available automatically without configuration.

Reqs – Req team folders – can be member Privilege

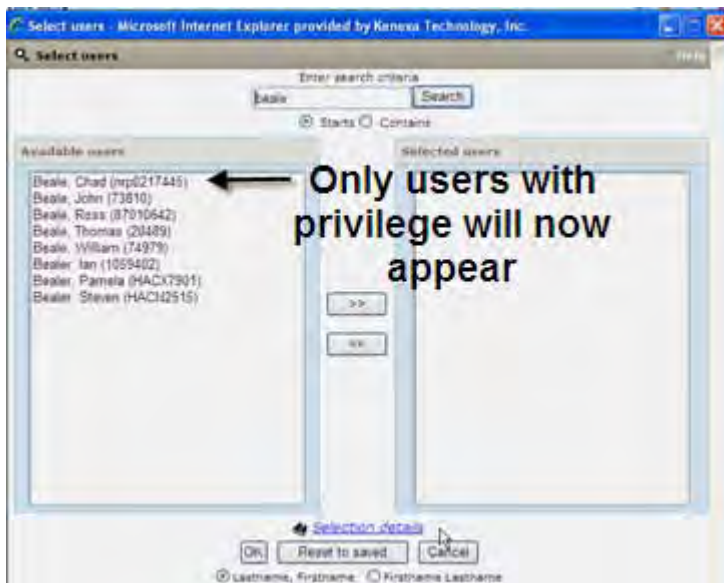
2x BrassRing is now enforcing the requirement that user types require the Candidate Categorization privilege, **Req team folders – can be member** in order to become req team members

Product	<ul style="list-style-type: none">⌘ 2x BrassRing<ul style="list-style-type: none">⋄ Agency Manager⋄ New UI⌘ Workbench Self-Service<ul style="list-style-type: none">⋄ Data Insight Tool⋄ SmartApproval⋄ Talent Gateways⋄ Other
Visible Changes	<ul style="list-style-type: none">⋄ No – contact your CSC for implementation details.⌘ Yes – details in <i>Visible Changes</i> document sent for each release build.
How do I get this feature?	<ul style="list-style-type: none">⌘ Automatic – see details below.⋄ Specific conditions required – see details below.⋄ Configuration required – see details below.

Feature Description

The Candidate Categorization privilege, **Req team folders – can be member** was designed to control whether users can become members of a req team. (Users who are not the hiring manager or recruiter become members when their user name is selected on the **Select users** list for the req team.)

User types without the privilege checked cannot become req team members, and user names for restricted types should not appear on selection lists. This will now be enforced.



Before this change, the names of users with or without the privilege could be selected and they could become req team members.

Limitations

The restriction of req team member candidates by user type privilege has an exception: if the req team field has users that are populated by RFA from other fields on the req template, then the exclusion of unprivileged users is disabled.

How Do Clients Get this Feature?

This feature is available automatically without configuration – by default, all 2x BrassRing **login** user types (Recruiters, Managers) have the privilege checked.



User types who do not log in that need to be on req teams must be granted the privilege in Workbench Self-Service.

Workbench Self-Service

Who does this: Certified Workbench User, Tier 0 and above

Set the Candidate Categorization privilege **Req team folders – can be member** in **Tools > Users > User types > Edit type permissions**.

Reqs – SmartPost Enhancements

When posting reqs to the SmartQuest job board, a new client setting allows 2x BrassRing users to go directly to a SmartPost page, skipping the intermediate screen. This provides a number of improvements in the posting process.

Product	<ul style="list-style-type: none">⌘ 2x BrassRing⋄ New UI⋄ Workbench Self-Service⋄ Talent Gateways	<ul style="list-style-type: none">⋄ Agency Manager⋄ Data Insight Tool⋄ SmartApproval⌘ SmartPost
Visible Changes	<ul style="list-style-type: none">⌘ No – contact your CSC for implementation details.⋄ Yes – details in <i>Visible Changes</i> document sent for each release build.	
How do I get this feature?	<ul style="list-style-type: none">⋄ Automatic – see details below.⋄ Specific conditions required – see details below.⌘ Configuration required – see details below.	

Benefits

Increases the ease and efficiency of the posting process.

Feature Description

A new client setting allows 2xB users to go directly to a SmartPost page, skipping the intermediate screen. The new client setting allows you to choose whether to:

- Skip the intermediate page and proceed directly to SmartPost's Job Creation page
- Skip the intermediate page and proceed directly to SmartPost's Source page.
- Continue using this current path with the 2xB intermediate page.

With the last option, users posting reqs to the SmartPost job board continue using the intermediate page, with no change to the current process. With that workflow, users posting to SmartPost click the "Post/edit details" icon and go to a 2xB intermediate page. They then click **Submit** to proceed to SmartQuest's Job Creation page. There the recruiter can make any modifications to the data before clicking **Continue** to proceed to SmartPost's Source page.

Using either of the first options (to skip the intermediate page) improves the posting process in a number of ways:

- Allows the client to choose the default landing page (Job creation page or the Source page)
- Supports ten client-defined custom fields
- Avoids an inconvenient page refresh while sending you directly to SmartPost
- Pre-populates the reply-to email address from the reply email field present in the posting interface defaults for the Edit Job information page)
- Updates text on Enter/Select fields and allows a description.

Going Directly to Job Creation Page or Source Page

When the client setting is to proceed to:

- Job creation page
user goes directly there after clicking the "Post/edit details" icon. The user can edit the data before moving forward to the source page.
- Source page
user goes directly there, unless required data is missing for some reason. In that case, the user is redirected to the job creation page to enter/edit the missing data.

In the following two cases, users may still encounter a small intermediate screen.

- The Job Apply URL is now mapped to a custom req field, so it can be selected by a recruiter when creating the Req. However, if not selected at that time, and a language has been configured with more than one Job Apply URL, the user must choose the appropriate URL when posting the req in that language. The user makes this selection before proceeding to either SmartPost page.

Please select one of the available Job Apply URL(s)



- Additionally, if a recruiter goes to the 2xB posting options page directly after creating a multi-lingual req, 2xB needs to determine the language in which the data should be sent to SmartPost. The user is presented with a screen similar to the one shown above, in order to choose the req posting language (which also requires that a Job Apply URL has been set up for the posting language).

Custom Fields

Ten custom req fields can be defined for use if the client setting for your account is one of the options that skips the intermediate page. A certified Workbench Self-Service user can configure up to ten custom fields of SmartPost against req custom questions (in Workbench, using **Tools > Forms > Reqs > Req forms** and selecting **Define custom req fields** on the **Req forms** page).

Email field Pre-Populated

The reply-to email address is now pre-populated for SmartPost. The email address used to pre-populate the email field for SmartPost is from your account's Workbench mapping or from posting interface defaults set up for your account. Workbench mapping is done from **Tools > Forms > Reqs > Req forms > Req Custom fields > Edit Field Attributes > Posting Interface mapping**).

How Do Clients Get this Feature?

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

SmartApproval – Inserting Approver for Restart Workflow

After an approval has been declined, when users “Undo Decline” and wish to restart the process in SmartApproval, the opportunity to insert additional approvers is now presented at the appropriate point (**after** the user clicks Restart Workflow).

Product	<ul style="list-style-type: none">▫ 2x BrassRing▫ New UI▫ Workbench Self-Service▫ Talent Gateways	<ul style="list-style-type: none">▫ Agency Manager▫ Data Insight Tool▫ SmartApproval▫ Other
Visible Changes	<ul style="list-style-type: none">▫ No – contact your CSC for implementation details.▫ Yes – see the <i>Visible Changes</i> document sent out for each release build.	
How do I get this feature?	<ul style="list-style-type: none">▫ Automatic – see details below.▫ Specific conditions required – see details below.▫ Configuration required – see details below.	

Benefits

Preserves the approval chain when you must restart the workflow , and makes it easier to insert new approvers at the correct point.

Feature Description

After an approval has been declined, when 2xB users “Undo Decline” and wish to restart the process in SmartApproval, the opportunity to insert additional approvers is now presented at the appropriate point, which is **after** the user clicks Restart Workflow.

Previously, the **Insert Approver** and **Restart Workflow** actions could both be performed from the same page, so users were adding approvers in the “current” workflow before clicking Restart Workflow. The restart effectively created a workflow that superceded the one with the newly-inserted approvers. Thus users didn’t see their inserted approvers after the restart.”

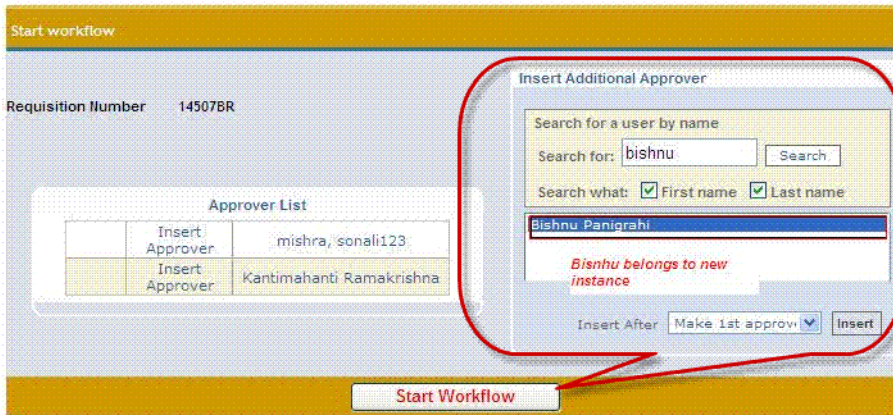
The process now is:

1. In 2xB, for a req that has been declined, use the **Undo Decline** action and click **View approvals**..



2. On the Approval View screen in SmartApproval, click **Restart Workflow**. A new instance of the Start Workflow screen opens.

3. Insert any desired additional approvers.



4. Click Start Workflow to start the new instance with the additional approver(s).

How Do Clients Get this Feature?

This feature is available automatically without configuration.

Smart Approval – User Name Differentiator

The “User name differentiator” client setting has new options to use either Employee ID or Phone # to differentiate users with the same name, both in 2xB and in SmartApproval.

Product	<ul style="list-style-type: none">• 2x BrassRing• Agency Manager• New UI• Data Insight Tool• Workbench Self-Service• SmartApproval• Talent Gateways• Other
Visible Changes	<ul style="list-style-type: none">• No – contact your CSC for implementation details.• Yes – see the <i>Visible Changes</i> document sent out for each release build.
How do I get this feature?	<ul style="list-style-type: none">• Automatic – see details below.• Specific conditions required – see details below.• Configuration required – see details below.

Benefits

Feature eliminates the need to add a unique identifier such as phone number or employee ID to the last name field within 2xB.

Feature Description

This enhancement affects clients who have the existing “User name differentiator” setting enabled to use either Employee ID or Phone # to differentiate users with the same name in 2xB. Whichever is displayed in 2xB, Employee ID or Phone #, will also be displayed in Smart Approval.

Examples:

Admin Tab: **View Role Assignments** screen with Employee ID differentiator enabled

The screenshot displays the 'View Role Assignments' interface. At the top, there are navigation tabs for 'Approvals', 'My Profile', and 'Admin'. Below the navigation, there are links for 'Home', 'Roles', 'Sequences', 'System', and 'Workflow'. The main content area is titled 'View Role Assignments' and includes a 'Workflow' section with several checked items: 307_req, TestMail, Req Workflow, SM-form, TestFallback, TestCodeMapping, and 307_form. There are two search panels. The left panel, 'Select User to View', has a search box with 'Poirier' and a 'Search' button. Below it, there are checkboxes for 'Show Inactive Users' (unchecked), 'First name' (checked), and 'Last name' (checked). A search result 'Kate Poirier (8760987)' is displayed. The right panel, 'Reassign Roles to User', has a search box with 'poirier' and a 'Search' button. Below it, there are checkboxes for 'First name' (checked) and 'Last name' (checked). A search result 'Kate Poirier (8760987)' is displayed. At the bottom of the right panel, there is a 'Reassign Selected Roles' button. At the bottom of the left panel, there is a 'View Assigned Roles' button.

Admin Tab: Assign Roles screen with Phone # differentiator enabled

Workflow

307_req TestMail Req Workflow SM-form TestFallback TestCodeMapping 307_form

Select Codes

Please make your selections

Business Unit Search

011 - VIK
3185-To Test TD 45546
Admin&Support
Administrative Assistant Pool

* wildcard

Location Search

Anakapalle
Austin TX
Bheemunipatnam
BIPI-R&D

* wildcard

Department Search

Search for: Search

* wildcard

Select Role and User

Please select a role

First Line Manager
First Line Manager
ExeRole1
ExeRole2

Search for a user by name

Search for: Search

Search what: First name Last name

Kate Poirier (7815308977)

This is an aggregate assignment

Make Assignments

The differentiator is displayed everywhere user names are displayed in Smart Approval, with these exceptions:

- Admin tab>Workflow>Express Approve
Under the “Comments” column the “inserted by” name displays the differentiator. Any comments entered as notes do not display the user differentiator because that is a text field.
- Approval tab>Active Workflow> View Approvers screen/Approve-Denial screen
Under the Progress tab’s Status column, comments do not display the differentiator. Any comments entered as notes will not display the user differentiator because that is a text field.
- Existing comments are displayed as is, without user differentiator (but newly-added comments include the differentiator if user differentiator setting is enabled with EmployeeID or Phone#).
- If User differentiator setting is updated from EmployeeID to Phone# and vice versa, existing comments are not changed but newly-added comments are stored with the updated user differentiator setting.

How Do Clients Get this Feature?

This feature is controlled by an existing client setting with new options. Please contact your CSC for more information about enabling this feature.

System Support – Browsers and Languages

Browser/OS Support

For continuously-updated information on supported platforms and browsers, please see the Browser/OS Support document on the User Resource Center. For your convenience, the information current at the as of the 12.4 release in December 2010 is included in this document – “*Kenexa 2x BrassRing™ Supported Browsers*” PDF file.

Language Support

As of Release 12.4, 2x BrassRing has a Russian language interface available.

For the full list of supported languages that is continuously-updated, please see the Language Support document on the User Resource Center. For your convenience, the information current as of the 12.4 release in December 2010 is included in this document – “*Kenexa 2x BrassRing Supported Languages*” PDF file.

Talent Gateways – Accessibility Standards

A new client setting allows Talent Gateways to be compliant with Web Content Accessibility Guidelines (WCAG) Version 2.0 A & AA guidelines.

Product	<ul style="list-style-type: none">• 2x BrassRing• New UI• Workbench Self-Service• Talent Gateways	<ul style="list-style-type: none">• Agency Manager• Data Insight Tool• SmartApproval• Other
Visible Changes	<ul style="list-style-type: none">• No – contact your CSC for implementation details.• Yes – details in <i>Visible Changes</i> document sent for each release build.	
How do I get this feature?	<ul style="list-style-type: none">• Automatic – see details below.• Specific conditions required – see details below.• Configuration required – see details below.	

Feature Description

With the new client setting enabled, accessibility for candidates using screen readers to access Talent Gateways is improved to meet Version 2.0 AA guidelines. (TGs currently support WCAG Version 1.0 Level A.)

These guidelines were developed by the W3 (W3C) Consortium (www.w3.org/WAI), and cover a wide range of recommendations for making Web content more accessible to people with disabilities, including blindness and low vision, hearing loss, etc. Many of these users utilize special tools to facilitate computer use such as screen readers.

An interesting example of improved accessibility is that when screen readers detect a gateway's language, they now read the text not only in that language, but with an appropriate accent.

Limitations and Known Issues

WCAG applies to all TG types (Basic TG, Full TG, Global TG) that are TG.Net. However, for technical reasons Gateway Questionnaires and Agency Manager gateways are not modified nor fully compliant.

How Do Clients Get this Feature?

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

Talent Gateways – Removing Default Recipients for Preferred Candidate Notifications

A new client setting gives you the ability to remove defaulted users on preferred candidate email notifications.

Product	<input checked="" type="checkbox"/> 2x BrassRing <input type="checkbox"/> New UI <input type="checkbox"/> Workbench Self-Service <input checked="" type="checkbox"/> Talent Gateways	<input type="checkbox"/> Agency Manager <input type="checkbox"/> Data Insight Tool <input type="checkbox"/> SmartApproval <input type="checkbox"/> Other
Visible Changes	<input checked="" type="checkbox"/> No – contact your CSC for implementation details. <input type="checkbox"/> Yes – details in <i>Visible Changes</i> document sent for each release build.	
How do I get this feature?	<input type="checkbox"/> Automatic – see details below. <input type="checkbox"/> Specific conditions required – see details below. <input checked="" type="checkbox"/> Configuration required – see details below.	

Benefits

A new client setting that sets default options for the field **Notify the following users when a candidate meets or exceeds preferred candidate target** can reduce unnecessary emails sent by 2x BrassRing.

Feature Description

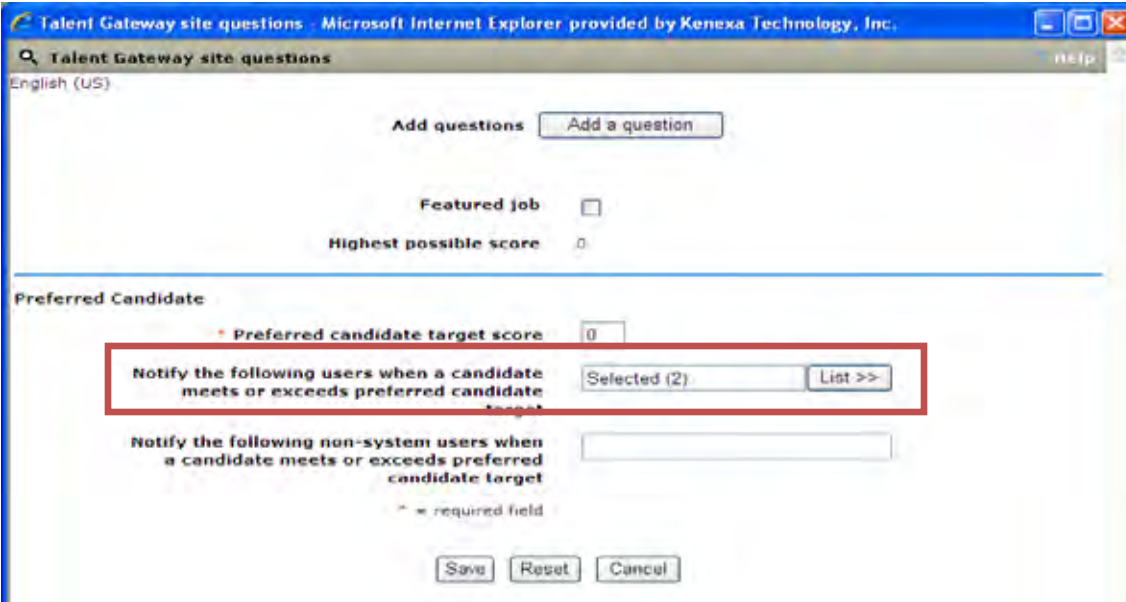
Currently in the Talent Gateway while creating site questions, 2x BrassRing automatically selects the hiring manager and the recruiter from the requisition in the **“Notify the following users when a candidate meets or exceeds preferred candidate target”** field. As a result, users may receive unnecessary emails from the 2x BrassRing systems.

This new client setting has two options to select from the drop down, **Recruiter & Hiring Manager** (so that current functionality is maintained) and Blank. Choosing Blank leaves the field blank on the Talent Gateway site questions page so that users can choose to have the system notify no one.

2x BrassRing users who have access to the Talent Gateways and have ADD or MODIFY access to site questions can access this feature.

Location of changes:

1. Go to Open requisitions.
2. Edit **Posting Options** for a Requisition.
3. Edit **site questions** for a Talent Gateway (each question should be scored).
4. In 'Preferred candidate' section there is a field labeled **“Notify the following users when a candidate meets or exceeds preferred candidate target.”**



The field displays the number of users selected (2, for the recruiter and hiring manager), when the client setting default is **Recruiter & Hiring Manager**." When Blank is selected, the **"Notify the following users when a candidate meets or exceeds preferred candidate target"** value will be blank.



The user can always override the default for the field and select people to be notified by clicking **List>>**.

How Do Clients Get this Feature?

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

Log req status change: yes
MaxFolderSize: 500000
Maximum Attachment Storage (MB): 100
Mobile device approvals: on
Mobile Device Display Elink Logo: both
MS Office 2007 attachment support: no
Multi req update: yes
Multi-language search--job posting questions: no
New UI: yes
New UI Analytics: no
New/Viewed tied to Req: no
Password Frequency 2xB: n/a
Password Frequency Agency: n/a
Password Frequency Gateway: n/a
PasswordFrequency: n/a
Preferred candidate email ("Notify the following users when a candidate meets or exceeds preferred candidate target") default to: Recruiter & Hiring Manager
Redirect candidate to Event Manager: no
Referral eLink expiration clicks (1-99): n/a
Referral eLink expiration time (DD:HH:MM): n/a
Referral rights expiration (1-365): n/a
ReportsCustomAnalyticsURL: no
ReportsCustomURL: no
ReportsStandardURL: <https://stagingrs.brassring.com/brassring.reporting.useri>
Req Attachments: no
Req Attachments File Size (mb): 500
Req calculation days on hold: most recent days on hold
Req subsidiary forms: yes
ReqAllowReapplies: yes
ReqAutofile: yes
ReqDeclineEnable: yes
ReqEmailEnable: yes

R
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Talent Gateways – Retrieving Candidate User IDs

Candidates who need to return to a Talent Gateway but have forgotten their login information may request help in retrieving it. A new user type privilege allows 2xB users to access a list of a candidate’s Talent Gateway user IDs in order to provide this information, as necessary.

Product	<ul style="list-style-type: none"> ⌘ 2x BrassRing ⌘ Agency Manager ⌘ New UI ⌘ Data Insight Tool ⌘ Workbench Self-Service ⌘ SmartApproval ⌘ Talent Gateways ⌘ Other
Visible Changes	<ul style="list-style-type: none"> ⌘ No – contact your CSC for implementation details. ⌘ Yes – see the <i>Visible Changes</i> document sent out for each release build.
How do I get this feature?	<ul style="list-style-type: none"> ⌘ Automatic – see details below. ⌘ Specific conditions required – see details below. ⌘ Configuration required – see details below.

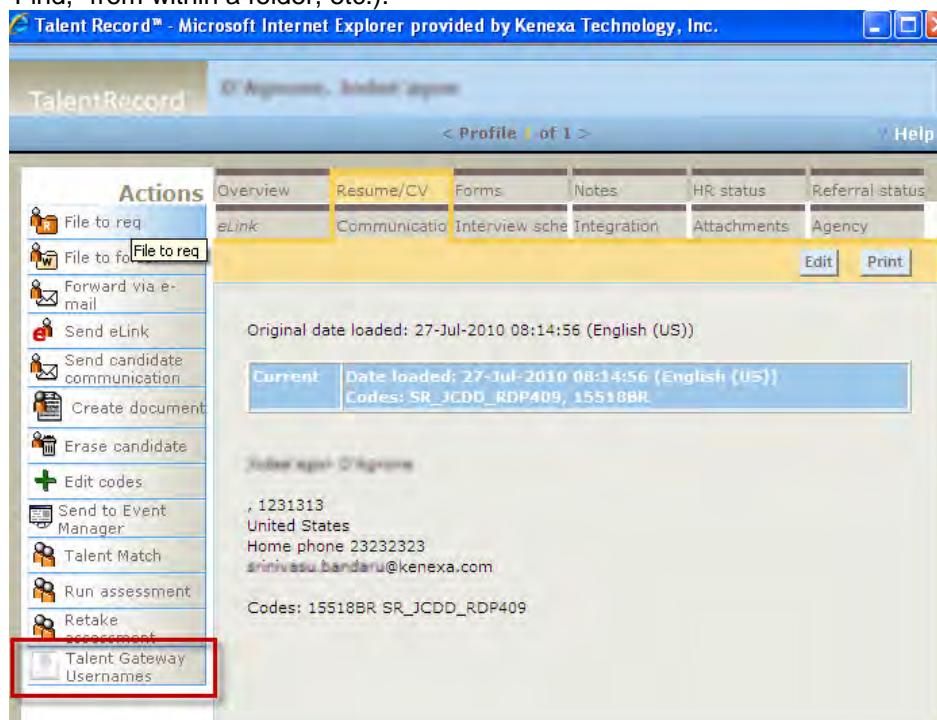
Feature Description

Candidates may have to return to a Talent Gateway multiple times to complete additional information, such as Gateway Questionnaires. If they have forgotten their login information, they often request help in retrieving it. A new user type privilege allows 2xB users to access a list of a candidate’s Talent Gateway user IDs in order to provide this information, as necessary.

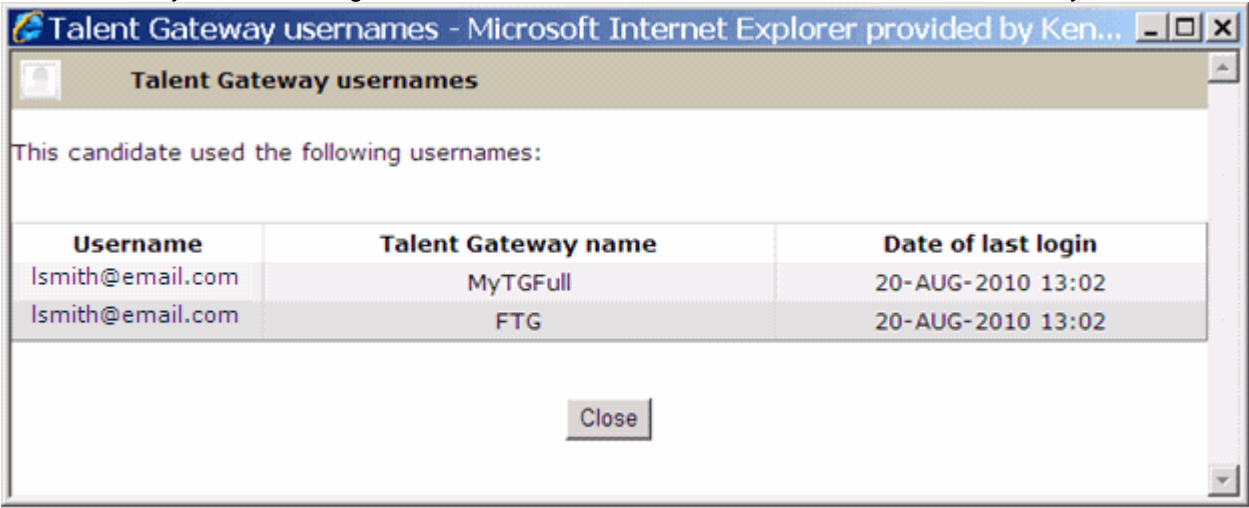
The privilege is “Candidates – look up Talent Gateway usernames.” For user types with the privilege, a new Action button, **Talent Gateway Usernames**, is available on the Talent Record. It allows you to retrieve the candidate’s usernames (user IDs) for all Talent Gateways for which the candidate has one or more accounts. A candidate might, for example, have two or more accounts for the same TG, one account used across multiple TGs, a combination of these, etc.

To look up the information for the candidate you are currently viewing (for example, in response to a phone request from a candidate):

1. Locate and open the candidate’s Talent Record (sing Candidate Search or QuickSearch, My candidates “Find,” from within a folder, etc.).



- Click **Talent Gateway Usernames**. The Talent Gateway usernames screen displays the list of Talent Gateway usernames, corresponding Talent Gateway for each username, and date/time of last login to the Talent Gateway, in descending order of Date/Time so that the username used most recently is listed first.



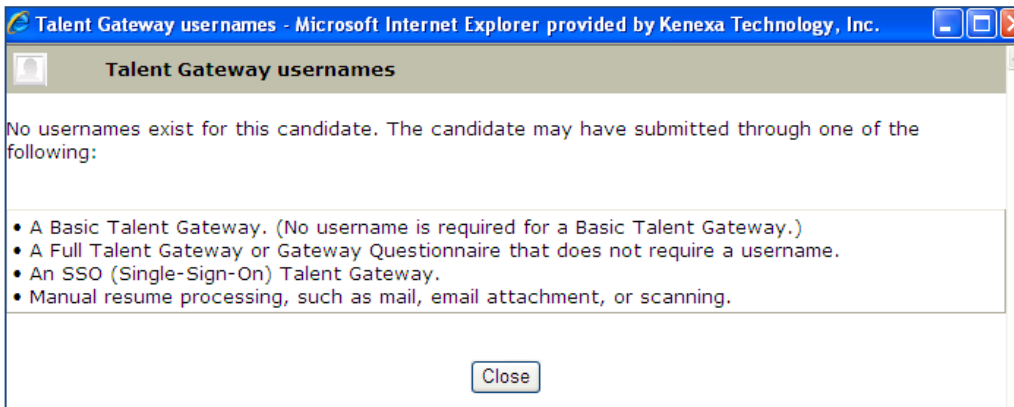
- Note the information you want to relay to the candidate and click **Close**.

If necessary, you can solicit more information from the candidate to determine which username is needed (if there is more than one).”

Username information is not available if the candidate submitted through one of the following:

- A Basic Talent Gateway. (No username is required for a Basic Talent Gateway.)
- A Full Talent Gateway or Gateway Questionnaire that does not require a username.
- An SSO (Single-Sign-On) Talent Gateway.
- Manual resume processing, such as mail, email attachment, or scanning.

In those cases, the following screen displays.



Best Practice Recommendations

Take any steps appropriate to ensure data security and candidate privacy before providing user IDs to a candidate. You should solicit identifying information, and communicate the candidate’s user ID according to your organization’s business practices and only if the answers are satisfactory.

Limitations and Known Issues

- If a candidate has logins to several Talent Gateways that use the same user name, the date and time of last login is updated to the same date/time for all the TGs on which that user name is used.
- When you click **Talent Gateway Usernames**, information for the currently-displayed candidate only is returned, even if multiple candidates are selected.
- Passwords cannot be looked up securely, so it is the candidate's responsibility to use the Talent Gateway username in conjunction with "Forget password" functionality on the TG to obtain access. If candidates cannot do so, they can create a new TG account at any time (note that duplicate submissions will be handled by the 2xB system, providing your account has configured the optimal stacking logic rules).

How Do Clients Get this Feature?


This feature is controlled by a new user type privilege in Workbench Self-Service. Please contact your CSC or Certified Workbench User for more information on enabling the feature.

Workbench Self-Service

Who does this: Certified Workbench User, Tier 1 and above

Set the Candidate Actions 2 privilege, "Candidates – look up Talent Gateway usernames." It allows users to view and click a button in the Actions area of the Talent Record to retrieve the list of a candidate's Talent Gateway usernames.

Tools > Users > User types > Edit type permissions [for selected type] > Set privileges for Candidate Actions 2

 Edit QuickStart User step 2: Set Candidate Actions 2 privileges
[Step 1: Set name and functions](#) Step 2: Set privileges

"Candidate Actions 2" privileges

Set privileges	
<input type="button" value="Select All"/>	
<input type="button" value="Clear All"/>	
<input type="checkbox"/>	Attachments - post to Candidate portal
<input type="checkbox"/>	Attachments - Sensitive attachments - all
<input type="checkbox"/>	Attachments - Sensitive attachments in my reqs only
<input type="checkbox"/>	Attachments - view "All attachments uploaded via Agency Manager"
<input checked="" type="checkbox"/>	Attachments - view "All attachments uploaded via Gateway"
<input type="checkbox"/>	Bulk print - request/receive files
<input type="checkbox"/>	Candidates - add current agency association
<input type="checkbox"/>	Candidates - file to all Reqs
<input checked="" type="checkbox"/>	Candidates - file to My Reqs
<input checked="" type="checkbox"/>	Candidates - file to working folders/inbox
<input type="checkbox"/>	Candidates - look up Talent Gateway usernames
<input type="checkbox"/>	Candidates - mark as viewed
<input type="checkbox"/>	Candidates - move/copy to all Reqs
<input checked="" type="checkbox"/>	Candidates - move/copy to My Reqs

Talent Gateways – Job Seekers’ Search Agent Expiration

Search agents created by Talent Gateway users (job seekers) now automatically expire after 90 days unless renewed.

Product	•• 2x BrassRing •• New UI •• Workbench Self-Service p Talent Gateways	•• Agency Manager •• Data Insight Tool •• SmartApproval •• Other
Visible Changes	•• No – contact your CSC for implementation details. p Yes – see the <i>Visible Changes</i> document sent out for each release build.	
How do I get this feature?	p Automatic – see details below. •• Specific conditions required – see details below. •• Configuration required – see details below.	

Feature Description

Search agents created by Talent Gateway users (job seekers) now automatically expire after 90 days unless renewed. Reminders go out 10 days before expiration, and renewal is as easy as clicking a link beside the search to be renewed. This change affects Full Talent Gateways (Platinum level).

Create Search Agent

Potential candidates can create search agents in a couple of ways:

- After logging into a Talent Gateway by clicking **Search agent manager** link



- After searching openings, saving the criteria and making a search agent out of that search.



The **Create saved search** page and the **Create search agent** pop-up window (for job seekers who are not logged in) include this informational text about the expiration of search agents:

Search agents automatically expire 90 days after their creation or renewal date. You can renew active search agents on the **Search agent manager** page.

The 'Create saved search' window contains the following fields and options:

- Search agent name:** A text input field with the instruction: 'Name this search so that you will recognize it when you want to use it in the future.'
- E-mail frequency:** A dropdown menu currently set to 'None' with the instruction: 'Choose how often you want to receive search results via e-mail.'
- E-mail address:** A text input field.
- Keyword:** A text input field with a 'Tips' link. Below it is the instruction: 'This field supports Boolean operators like AND, OR and AND NOT.'
- Date posted:** Radio buttons for 'All posting dates' (selected) and 'Include all jobs updated after' followed by three dropdown menus for '01', 'Jan', and '2010'.

A red box highlights the following text at the bottom of the form:

Search agents automatically expire 90 days after their creation or renewal date. You can renew active search agents on the **Search agent manager** page.

At the bottom of the window are 'Save' and 'Cancel' buttons, and a footer that says 'Powered by KeneXa'.

Once a user saves a search, it is listed on the **Search agent manager** page.

Search Agent Manager

Users can run a search manually, create additional search agents, and edit, delete, or renew search agents from the **Search agent manager** page. The search agent grid includes a new column called **Days to expiration**. The value in this column is populated with the number 90 on the first day a search agent is created. This value decrements by one daily until it reaches 0. The search agent disappears from the grid the following day unless the job seeker renews it. The grid also includes a [Renew](#) link beside each Days to expiration value. Users simply click this link to renew the agent for 90 days (from the date clicked).

Home Search agent manager ? Help

Search agent manager

The Search Agent Manager allows you to create, edit and run your saved searches. Saved searches can be configured to have the newest results of your search e-mailed to you on a regular basis.

Create new search agent Delete selected search agents

Clear checked

<input type="checkbox"/>	Search name	E-mail frequency	Run	Edit	Days to expiration	Delete
<input type="checkbox"/>	LS Test	Daily	Run		90 Renew	

Create new search agent Delete selected search agents

Powered by Kenexa

The system sends expiration warning email when Days to expiration = 10

The **Edit saved search** page also includes the informational text about agent expiration for logged-in job seekers:

Search agents automatically expire 90 days after their creation or renewal date. Editing your search agent does not extend its expiration date. You can renew active search agents on the **Search agent manager** page.

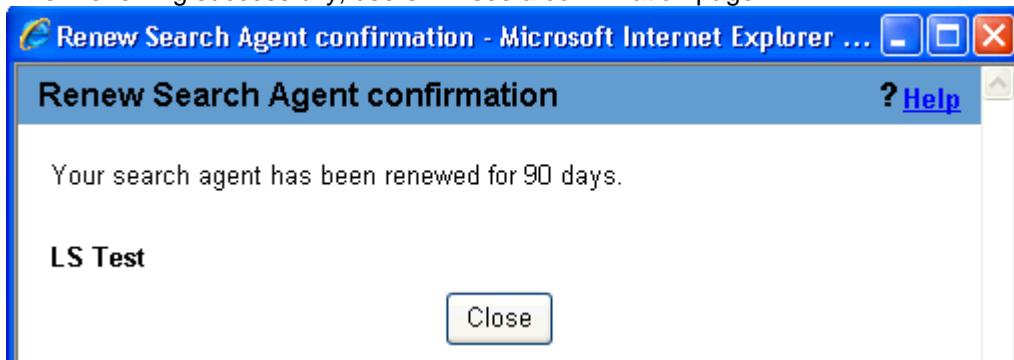
Renewing Search Agents

Job seekers with a valid email address on file receive one “Search Agent Expiration Warning Email” when “Days to expiration” = 10 for any search agent that they create. They can renew for 90 days simply by clicking the link in the email, whose text is:

Your search agent [Search Agent Name] will expire in 10 days. Click the link below to extend the search agent for 90 days. After the search agent has expired, you must log in to the Talent Gateway to create a new search agent.

[Click here to renew this agent](#)

When renewing successfully, users will see a confirmation page:



If a user clicks the renewal link in an expiration warning email *after* the search agent has already expired, they instead see a message informing them that the search agent has expired.

How Do Clients Get this Feature?

This feature is available automatically without configuration.