

IBM Kenexa BrassRing on Cloud

*IBM Kenexa BrassRing on Cloud
Release Notes*

November 13, 2017



Note

Before you use this information and the product it supports, read the information in "Safety and environmental notices" on page x and "Notices" on page x.

This edition applies to IBM Kenexa BrassRing on Cloud Release 17.11.13 and to all subsequent releases and modifications until otherwise indicated in new editions.

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Contents

Terms and conditions for product documentation iii

Chapter 1. Client Reminders 1

End of Support for Classic Talent Gateway 1

Chapter 2. Introduction 3

Visible Changes 3

 Responsive Apply 3

 New User Interface 9

 Lead Manager 11

Configurable Changes 12

 Responsive Apply 12

 New User Interface 12

 Lead Manager 13

BrassRing Workbench 30

 BrassRing Workbench Changes 30

 Short Messaging Service (SMS) 35

Notices 37

Programming interface information 39

Trademarks 39

Terms and conditions for product documentation. . 39

IBM Online Privacy Statement 39

Safety and environmental notices 39

Chapter 1. Client Reminders

The **Client Reminders** section reminds clients of recently distributed important notices and links to comprehensive documentation and training for the special features recently introduced.

End of Support for Classic Talent Gateway

Recently, a notice was sent to all IBM Kenexa BrassRing clients on October 18, 2017 informing clients that IBM Kenexa is discontinuing support of **IBM Kenexa BrassRing on Cloud Classic Talent Gateways and classic apply process on December 31st, 2017.**

With the completion of the Candidate Zone through 2017, it is time to ensure your candidates are getting the latest and greatest of BrassRing's job apply functionality by moving all of our clients to the Responsive Talent Gateways.

Competition for top candidates is fierce and **research has shown that employees designated as high-potentials are especially attracted to searching and applying for jobs using mobile devices.** Our customers who have moved to responsive are seeing a vast improvement in candidate completion rates. Sunsetting the Classic Talent Gateways will also provide efficiencies and allow IBM to focus on other areas of BrassRing that will benefit the entire BrassRing community.

Action May Be Required: If you haven't already, we advise transitioning off Classic Talent Gateways and the classic apply process no later than **December 31st, 2017.** Should you want to stay on classic, these talent gateways and classic apply processes will no longer be supported by IBM, meaning that although IBM will not be shutting Classic Talent Gateways off, IBM will no longer work on bug fixes specific to Classic Talent Gateways and we will not ensure accessibility standards on anything other than the responsive Talent Gateways and Responsive Apply process. All new functionality will only be available in the responsive experience.

Want to get started on the IBM Responsive Apply Talent Gateways but don't know where to start? Watch our Responsive Apply Overview and Configuration Webinars on the Support Portal to understand who should be involved, an example project timeline, configuration instructions, and much more! You can also reach out to your Kenexa Representative with any questions or concerns.

Chapter 2. Introduction

This document presents changes, both visible and configurable, included in the November 13 release of IBM Kenexa® BrassRing® on Cloud and IBM Kenexa Lead Manager.

The objectives of this document are to:

- Present feature enhancements and usability and performance improvements that are introduced in this release.
- Document changes in system requirements, if applicable.

Visible Changes

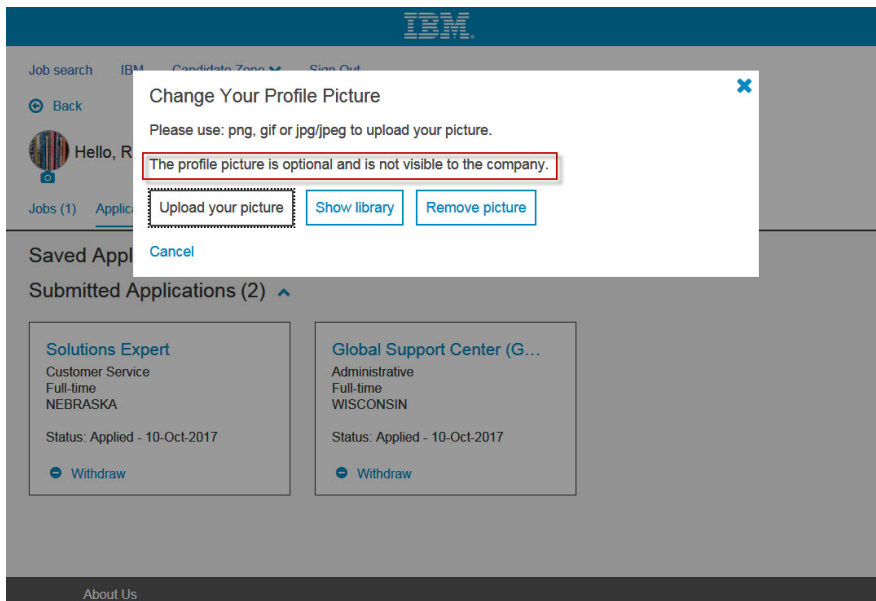
The current release of IBM Kenexa BrassRing on Cloud includes the following visible changes for BrassRing and IBM Kenexa Lead Manager..

Responsive Apply

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

Candidate Zone - Profile Picture Disclaimer

Starting this release, based on clients' request, a new disclaimer is added to the Add/Change Profile Picture screen. The disclaimer now reads: **The profile picture is optional and is not visible to the company.** to assure candidates that the profile picture they can add is optional and would not be visible to any personnel at the company. Candidates can browse to this screen by logging in to their Responsive Talent Gateway profile and selecting the Profile Picture icon.

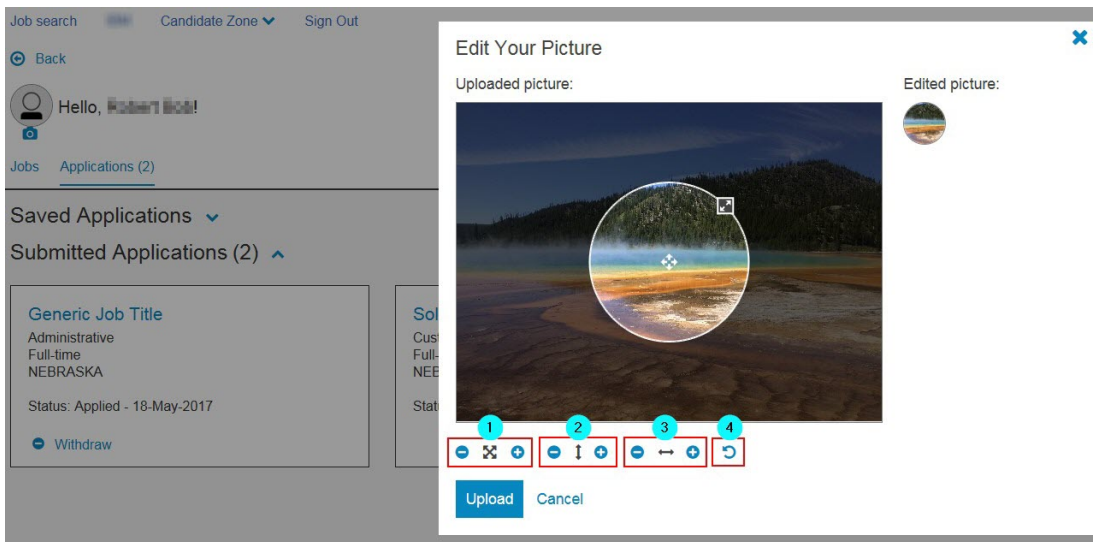


RTC Internal Reference # 92521.

Candidate Zone - Profile Picture Accessibility

Before this release, candidates were unable to crop a picture they were trying to upload by using their keyboard. Cropping was available only by using the mouse. This deviation is now

addressed to ensure accessibility standards and an improved overall experience. The profile picture can now be cropped by using a keyboard or a mouse. Use the following controls on the **Edit Your Picture** page.

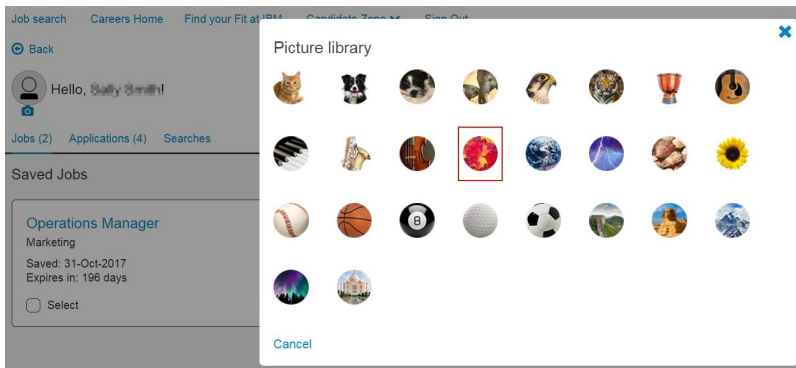


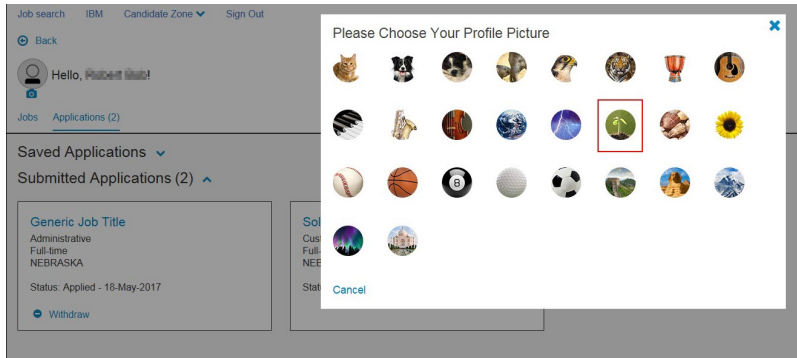
1. Expand or shrink the picture area
2. Move the picture area up and down
3. Move the picture area left and right
4. Reset

RTC Internal Reference # 90919

The library of pictures has a replacement. The picture of Autumn leaves was not successful in meeting accessibility requirements and is replaced by a new picture called Seedling.

Before replacement
After replacement





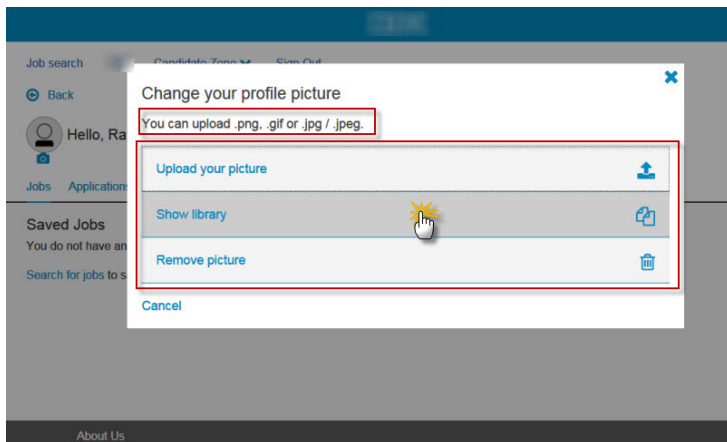
RTC Internal Reference # 90832

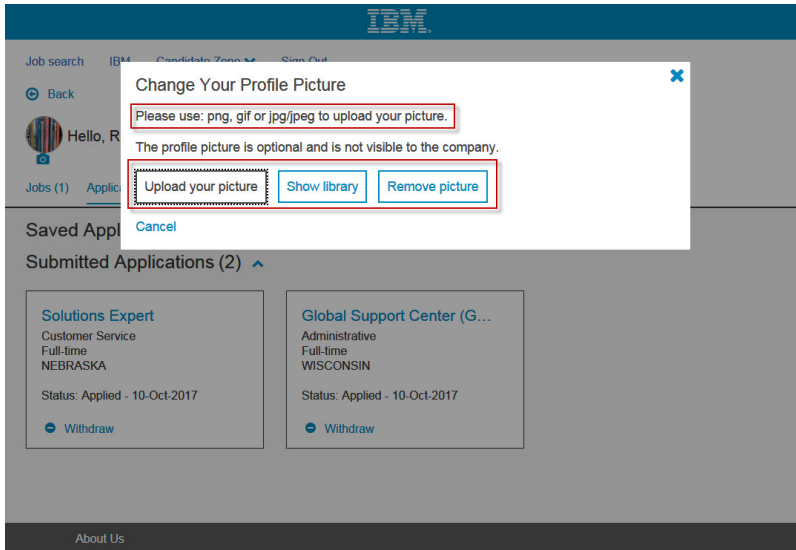
To comply with accessibility requirements, and to improve candidate experience the following changes are made in the Profile Picture upload screen.

1. The links for various picture selection options are replaced with buttons. Icons are removed to reduced ambiguity.
2. The text that provides information about the types of accepted files now displays the text: **Please use: png, gif or jpg/jpeg to upload your picture.** You can upload .png, .gif or .jpg / .jpeg.

Before:

After:

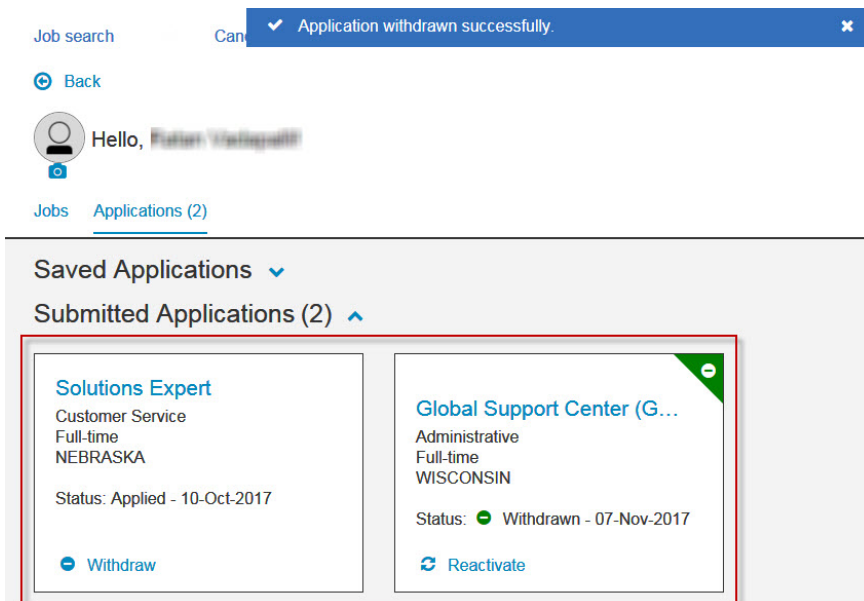




RTC Internal Reference # 91079

Candidate Zone - Remove Link

The job submission cards in the candidate zone previously displayed a **Remove** option. The **Remove** option displayed only when the candidates withdrew from the requisition (Candidate Not Interested) or Company Not Interested HR Status category. Selecting the **Remove** link hid the card from display and the card could not be retrieved after it was removed. This action in turn resulted in the candidates not being able to reactivate their application or view it. In order to avoid confusion, the **Remove** link no longer displays on the candidate application cards in the candidate zone.

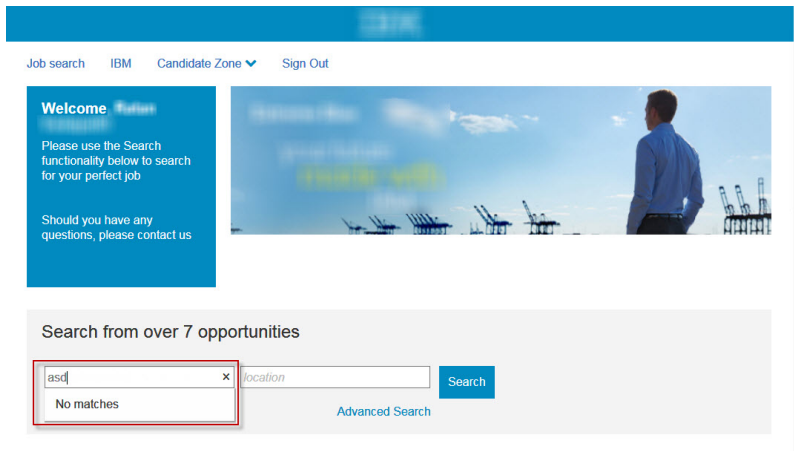


RTC Internal Reference # 93810

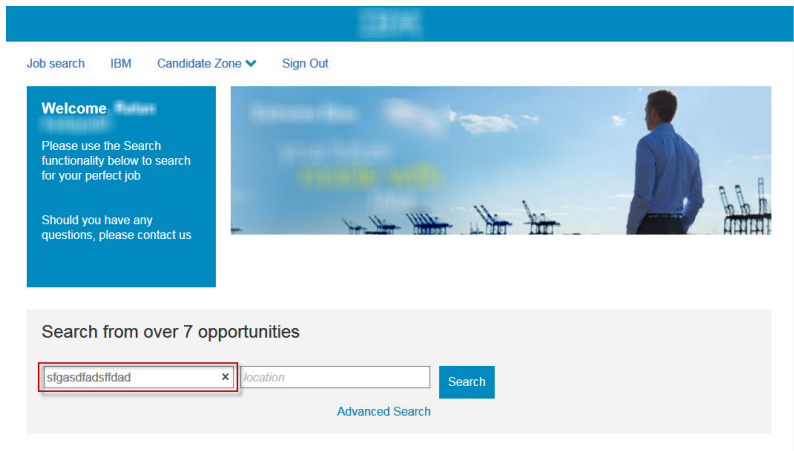
Job Search Field - No Matches Message

The Keyword field on the Responsive Talent Gateway landing page previously displayed the message **No matches** if the search did not find a match from the predefined fields it checks against for type ahead purposes. This was confusing to candidates as they believed that no reqs matched their search criteria; which was not true. In order to avoid confusion, **No Matches** no

longer displays and the candidate can continue by selecting **Search**.
No matches is not displayed when the entered text does not result in any suggestions. Even if the



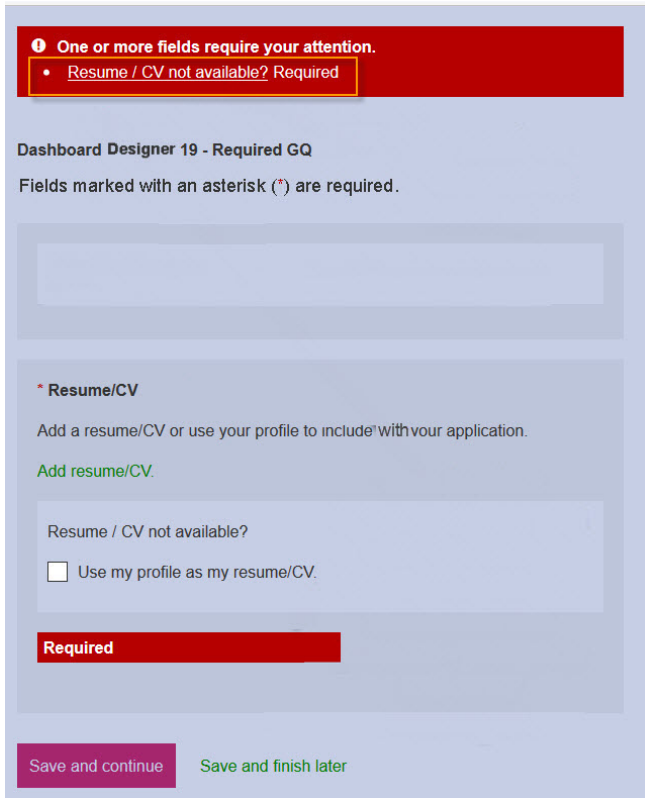
text entered is gibberish and there are no suggestions that can be displayed.



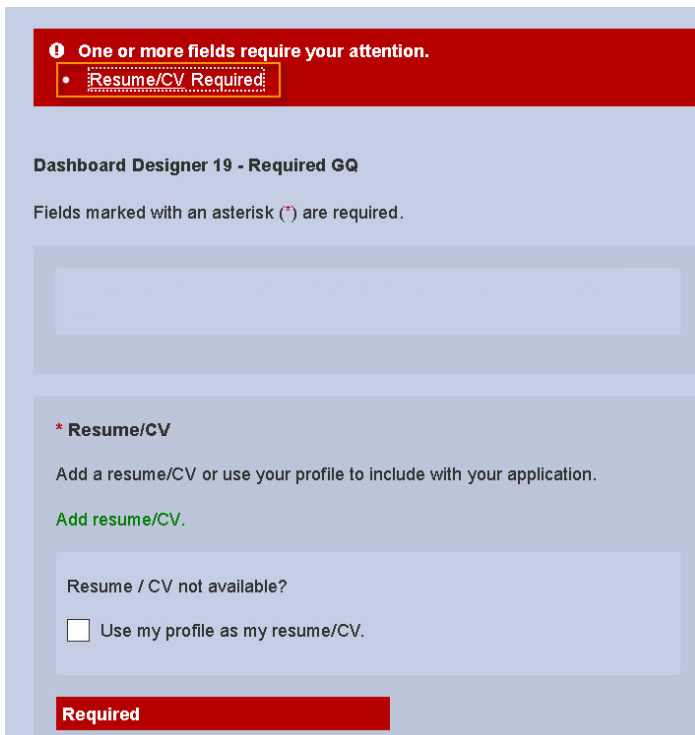
RTC Internal Reference # 92250.

Responsive Apply - Error Message

An error message displays when candidates skip the addition of the Resume/CV during the application process. The error message previously displayed was **Resume / CV not available? Required**. This message was sometimes displayed despite adding a resume/CV.



Starting this release to reduce confusion and improve candidate experience, the error message now displays **Resume / CV Required**. This message displays only when the resume/CV is not added during the application process.



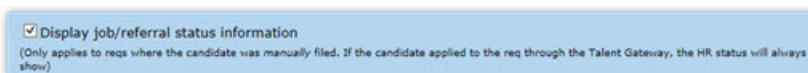
RTC Internal Reference # 92902

Responsive Apply - Job Cards

Starting this release, when a candidate is moved from one req to another req by a BrassRing user or RAM action, the Submitted Application job card remains for the original req and the HR Status Category that displays is updated to Company Not Interested.

Notes

- This job card behavior applies only when candidates are **MOVED** and does not apply to the **COPY** action workflow.
- If your organization customized the **HR Status Category of Company Not Interested**, the revised category name displays.
- The original req's card does not display the Withdraw/Reactivate actions and the Add files option is hidden on the Application Details page.
- If "Display job/referral status information" is selected, the job card for the displays for the secondary req and the appropriate HR status category displays.
 - This setting can be enabled via **Workbench > Tools > HR Statuses > Edit the status > Talent Gateway and Agency Manager** settings.



Manual Move Example

- Sally Smith applied to Req 123BR. The Recruiter moves Sally out of Req 123BR and into Req 456BR. Sally's job card for Req 123 is still visible in the **Candidate Zone** but the **HR Status Category** displays **Company Not Interested**.
- John Johnson applied to Req 123BR. The Recruiter copies John into Req 456BR. Because John was copied and **NOT MOVED**, the job card for Req 123BR displays the same **HR Status Category** as it did previously and it is **NOT** update to **Company Not Interested**.

Rules Automation Manager Example

- Sally Smith applied to req 123BR; which is an evergreen req. The RAM has the action to move candidates to matching hiring reqs. Sally matched to hiring req 456BR. Her job card for req 123BR will still be visible on the Candidate Zone but the HR Status Category displayed displays Company Not Interested.
- John Johnson applied to req 123BR; which is an evergreen req. The RAM copies John into req 456BR. Because John was copied and not moved, the job card for req 123BR displays the same HR Status Category as it did previously. (It does not update to Company Not Interested.)

RTC Internal Reference # 93669.

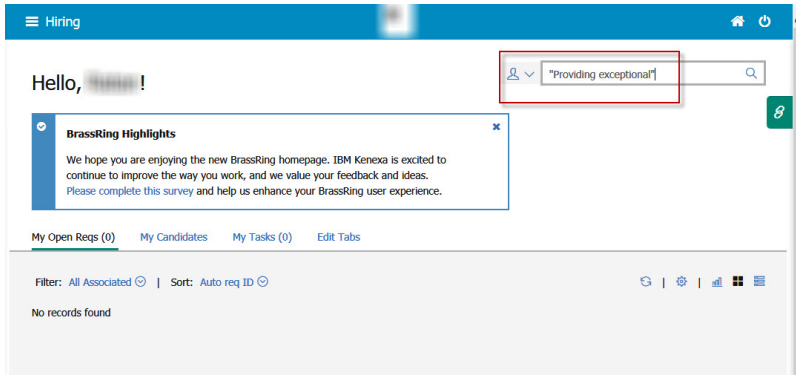
New User Interface

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

Candidate Quick Search - New Search Operators

Starting this release, double quotation marks are allowed in the quick search field of the BrassRing New User Interface. Users can search for an exact phrase by providing the phrase within the double quotation marks.

If a user would like to do a partial search on a word, that user should **NOT** use double quotation marks. Example: searching for "Jav" does not return candidates with Java in their resume because there is no exact match.



In addition, when BrassRing users search candidates from the Quick Search option in the New User Interface, the default search operator is **AND**. The default search operator that was previously used **OR** displayed unexpected search results and caused users to browse back to the Classic User Interface to complete searches.

When using Boolean search, users must use upper case operators (AND/OR) instead of lower case operators (and/or).

RTC Internal Reference # 89901, 92430.

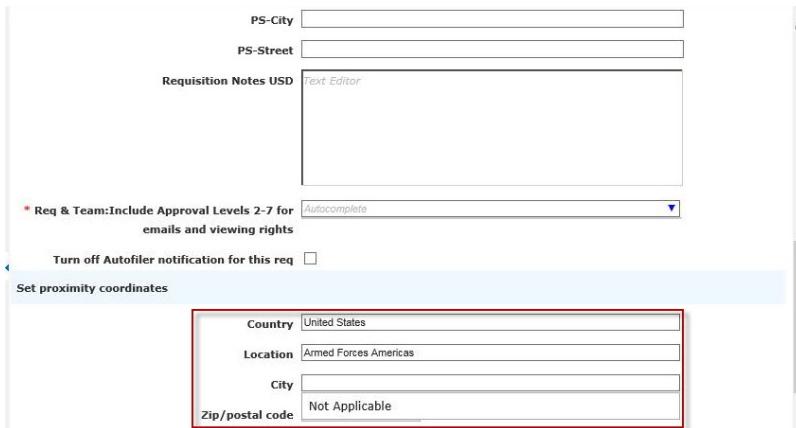
BrassRing Support - Old Support Information

It was reported BrassRing users received obsolete contact information for BrassRing Support in an email after they scheduled a standard report. The information included an obsolete support phone number and information about the User Resource Center that is no longer available. This deviation is adjusted now. Users are provided with current information, including the URLs for the **Support Portal** where they can find all BrassRing support related information.

RTC Internal Reference # 91907.

Reqs - New Cities

Starting this release, two new cities are available for the proximity search for the states of Armed Forces Americas, Armed Forces Europe, Armed Forces Pacific. APO and FPO were added as cities and are available for selection when creating requisitions.



RTC Internal Reference # 91039.

Lead Manager

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

Lead Profile - Lead Name

The **Lead name** now displays in the Lead Profile page.

Lead Profile - Lead Name

When Lead Manager users edit a Lead Profile page, the Lead Profile page now displays the **Lead Name**.

- **Previous Lead Profile Page**

- **New Lead Profile Page with Lead Name**

RTC #78747

Lead Profile - Clearing Duplicate Leads

Lead Profile - Clearing Duplicate Leads

When multiple leads are uploaded by the Bulk Parsing feature, there is a possibility of duplicate leads. Duplication of leads can be reviewed by going to **Hamburger Menu > Review Bulk Parsing**. A new button **Update Profile and proceed to next** is now available on the Bulk Parsing Review page. Users can compare the duplicate leads with the existing lead profile or parsed resume, update the duplicate profile and then select **Update profile and proceed to next** to move on to the next duplicate lead in the list. Users can alternately, select **Update profile and return to list** or **Discard profile**. By selecting the **Update profile and return to list**, users can see the list of duplicates instead of moving to the next duplicate lead directly, by selecting **Discard Profile**, users can discard the duplicate profile.

Lead Manager

IBM

< Back

Bulk parsing review

Review the profiles in conflict with those already existing in the system. Update the existing profiles or discard the new parsed profile.

1 of 2 lead profiles in conflict >

Type Address 1

Address 2:

Type Address 2

Country:

United States

Select State/Region/Province:

Select State/Region/Province

City:

Type City

Postal/Zip Code:

Type Postal/Zip Code

LinkedIn URL:

Type LinkedIn URL

Facebook URL:

Type Facebook URL

Twitter URL:

Type Twitter URL

Display: Existing lead profile

Home Number:

United States

Social media:

Submission Type: Bulk Parsing

Area of Interest:

Resume

Apr_07_2016.docx

Uploaded on Nov 08, 2017

Update profile and proceed to next Update profile and return to list Discard profile Cancel

RTC Internal Reference # 78744

Configurable Changes

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

Responsive Apply

The current release does not include any configurable changes for Responsive Apply. Configurable features must be configured or turned on to be visible and available to users.

New User Interface

The current release does not include any configurable changes for New User Interface. Configurable features must be configured or turned on to be visible and available to users.

Lead Manager

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

Confidential Leads

This release introduces support for the **Confidential Leads** feature in Lead Manager in the **STAGING** environment **ONLY** with the release to **Production** following in December. The **Confidential Lead** feature allows **Confidential Lead Administrators** to designate and track **Confidential** leads for executive type or sensitive roles. Administrator can also add privileged users access to view specific **Confidential Leads**. Other users will not be able to view **Confidential Leads** in Lead Manager. **Confidential Leads** are not added to **Watson Campaign Automation (WCA)**.

Note: When leads are marked as **Confidential** they cannot be changed back to **public**.

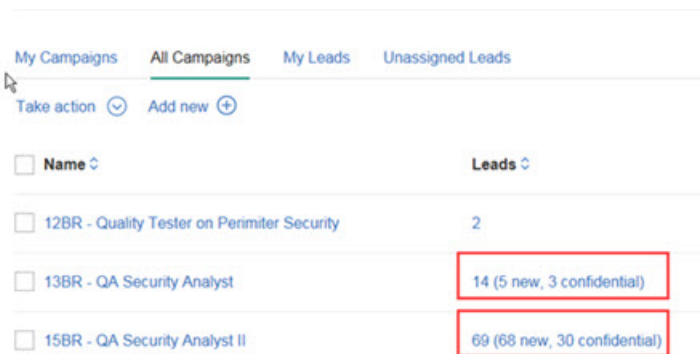
Confidential Lead Feature:

When leads are marked as **Confidential**, viewing these leads is automatically restricted in both Lead Manager and the lead is removed from **Watson Campaign Automation** to ensure they are not inadvertently included in mass mailings. **Confidential Leads** can then be tracked within Lead Manager just as any other lead would be, but the associated lead profiles are not accessible by non-confidential users. **Confidential Lead** profiles are only accessible to those Lead Manager users who have **Confidential Administrator** or **Confidential View** privileges and are assigned to the lead's record.

Note: Before you configure the **Confidential Feature**, read and review the “Lead Manager Considerations” on page 24 and the Known Issues sections and remember that when a lead is marked **Confidential**, the lead cannot be switched back to being public.

Confidential Lead Details

Lead's marked as **Confidential** cannot be viewed, accessed, or edited by Lead Manager users without the **Confidential** privileges and management of confidential leads is restricted by the **Leads - Confidential** privileges. Lead Manager users with no confidential lead privileges see a number enclosed in parentheses next to the number of confidential leads within a campaign on Campaign:Lead Grid pages but cannot access or view the confidential leads.



Name	Leads
12BR - Quality Tester on Perimeter Security	2
13BR - QA Security Analyst	14 (5 new, 3 confidential)
15BR - QA Security Analyst II	69 (68 new, 30 confidential)

Linking BrassRing candidates and Lead Manager leads is different and interactions with Watson Campaign Manager operate differently. See Linking in the Confidential Workflow.

For example, a Lead Manager user with the **Leads - Confidential (Administrator)** logs into Lead Manager. This Administrator manages multiple **Confidential Lead Teams** which means that this Administrator can take action (view, edit, and reassigned) on all the confidential leads within those **Confidential Lead Teams**.

Confidential Lead Workflow - Exceptions

For Lead Manager users with Confidential privileges, the basic Lead Manager workflow remains the same with the following exceptions:

- **Confidential Leads** can be linked only to **BrassRing secure candidates**. Select BrassRing Secure Candidates Feature to learn more about secure candidates. Administrators must ensure that they have the appropriate privileges in **both** BrassRing and Lead Manager when they are making leads confidential. Because linking **BrassRing** candidates and **Lead Manager** leads is contingent on the Lead Manager user privileges, refer to Linking in the Confidential Workflow and Known Issues.
- The **Confidential Lead** feature introduces a new concept, the **Confidential Lead Team**. Each **Confidential Lead** has its own **Confidential Team**.
 - Lead Manager **Confidential Administrators** assign **Confidential Team Members** in the **Confidential Permissions** section of a **Confidential Lead** profile page.
 - Only **Confidential Team Members** can view the **Confidential Permissions** section of a **Confidential Lead** profile page.
 - **Confidential Administrators** can also reassign **Confidential Team Members** from one **Confidential team** to another using Reassigning Leads.

Lead Manager users with **Confidential Lead - View** and **Leads - Confidential (Administrator)** privileges, can view **Confidential Leads** on the following pages:

- **Campaigns**
- **Lead Grids**
- **Bulk Upload**
- **Lead Profile**

Confidential Lead Privileges

Lead Manager users with the **Leads - Confidential (Administrator)** privilege can make a lead **Confidential** and determine who can be on the **Confidential Lead Team** and therefore who can view the **Confidential Leads**.

Lead Manager users with the **Leads - Confidential (View)** can view **Confidential Lead Profiles** if they are also **Confidential Team Members**.

Lead Manager users with the **Leads - Confidential (Bulk Reassign)** can reassign **Confidential Leads** to different **Confidential Lead team members** within the Lead Manager application.

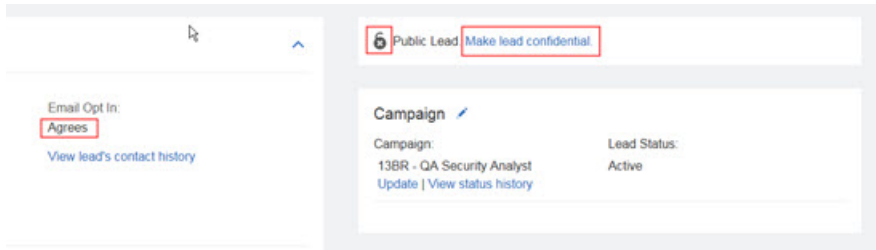
Confidential Lead Workflow - Making Leads Confidential

Lead Manager users with the **Leads - Confidential (Administrator)** privilege are the only ones who can make Leads **Confidential**.

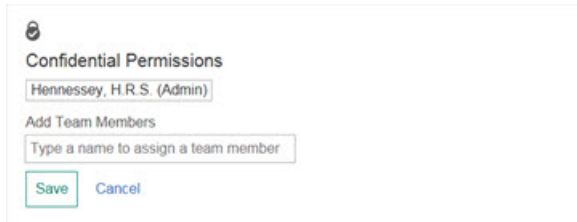
Note: When leads are marked as **Confidential**, they cannot be changed back to public. Additionally, when a lead is made **Confidential** their **Watson Campaign Automation** record is removed.

To make a lead **Confidential**, the **Confidential Administrator**:

- Browses to the lead's profile page. In the upper right corner of the lead profile page,
 - An unlocked icon indicates the lead's public status
 - The **Make Lead Confidential** indicates the lead's public status
 - The **Email Opt In** section is set to **Agrees**

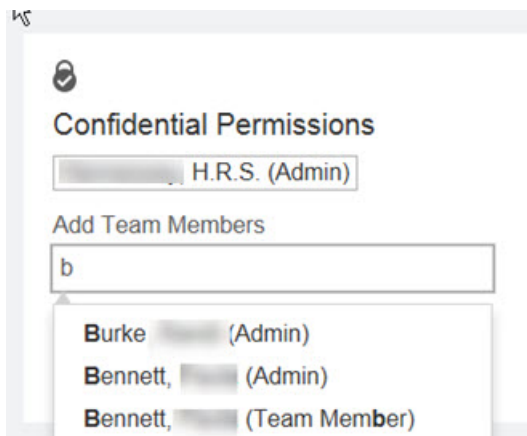


- Selects **Make Lead Confidential**. The **Confidential Permissions** section opens.

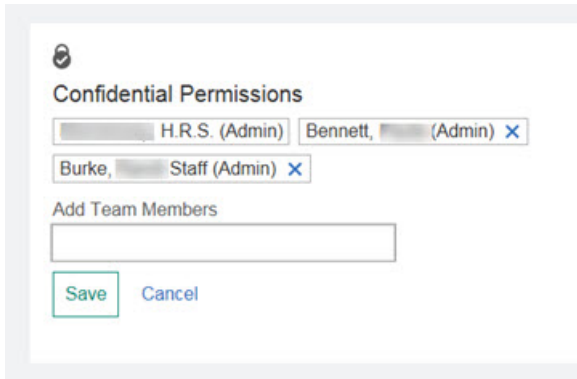


- Begins entering a team member name in the Add team Members text box. Entering text activates auto complete, and a list of potentially matching team members displays in the drop-down menu.

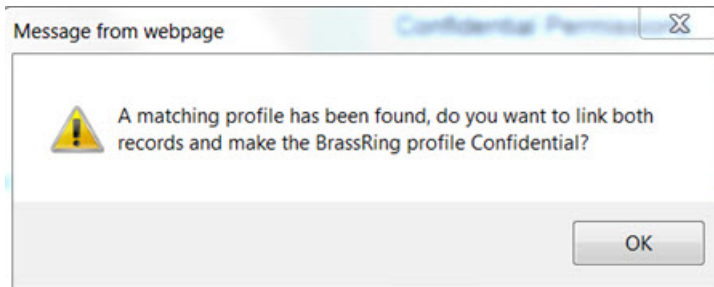
Note: Only Lead Manager users with **Leads - Confidential (View)** or **Leads - Confidential (Administrator)** privileges display in the auto complete drop-down menu.



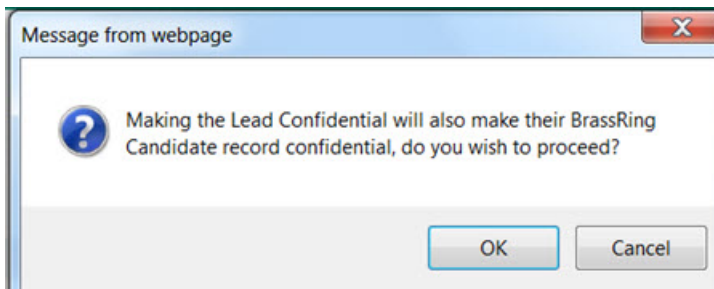
- Selects one or more names from the auto complete list to add leads to the **Confidential Team**.



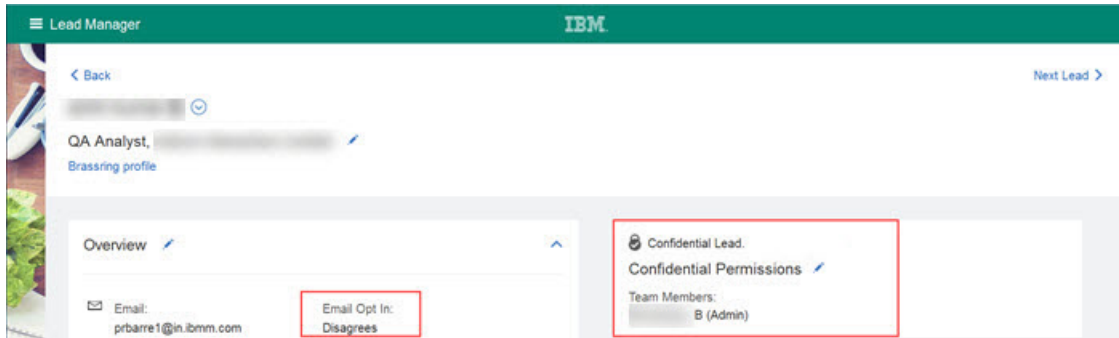
- Selects **Save**. If a corresponding BrassRing profile is found, a modal opens stating that a matching profile has been found and requests permission to make the BrassRing profile confidential.



- Selects **OK**. A model opens stating that making the lead confidential will make the BrassRing Candidate record confidential and asks permission to proceed.



- Selects **OK**. The lead is made **Confidential** and the **Confidential Permissions** section displays.
 - A locked icon indicates the lead's **Confidential** status
 - The **Confidential Lead** designation
 - The **Email Opt In** section is set to **Disagrees**



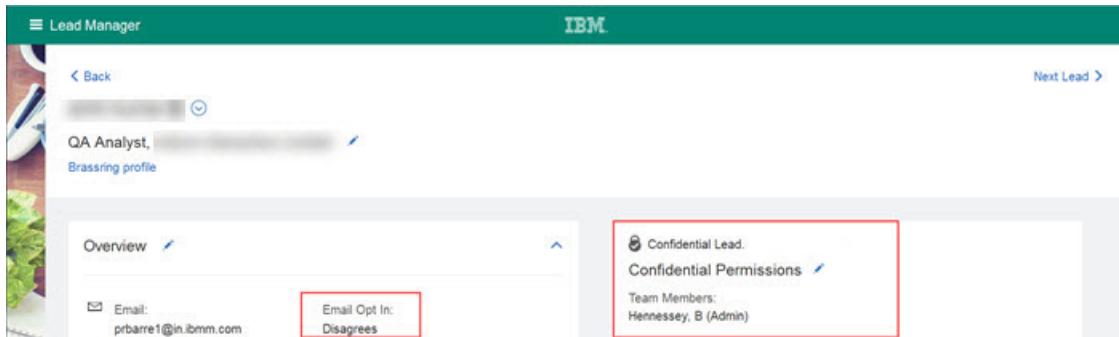
Confidential Lead Profile Page

The Lead Profile page now displays a **Confidential Permissions** section. The **Confidential Permissions** section is only visible when the lead is marked **Confidential** and the Lead Manager users who are viewing the lead profile page have both the **Leads - Confidential (View)** user privileges and are **Confidential Team members**. The **Confidential Permissions** section shows:

- A lock icon for each Confidential Lead



- A list of **Confidential Team members** who have viewing privileges for the lead



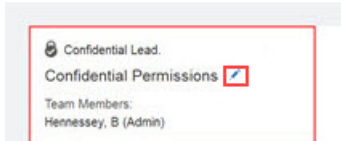
In the **Overview** section for the Email Opt in for **Confidential Leads**, the word **Disagrees** indicates that you cannot send email communications to confidential leads. If a Lead Manager user tries to send communications to **Confidential Leads**, an alert displays indicating the system cannot send an email.



Adding Confidential Team Members

Lead Manager Administrators with the **Leads - Confidential (Administrator)** privilege create and maintain the **Confidential Team members** for each **Confidential Lead**. To add **Confidential Team Members**, the **Confidential Administrator**:

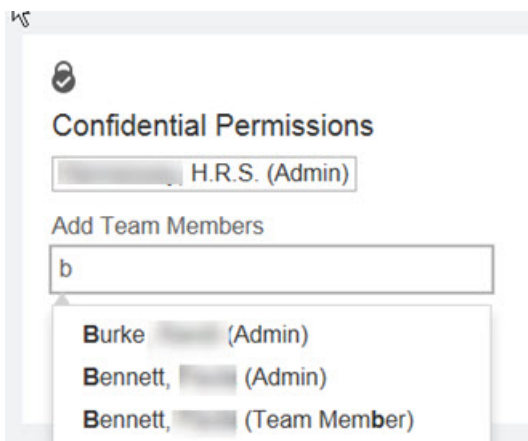
- Selects the edit icon in the **Confidential Permissions** section of the **Confidential Lead** profile.



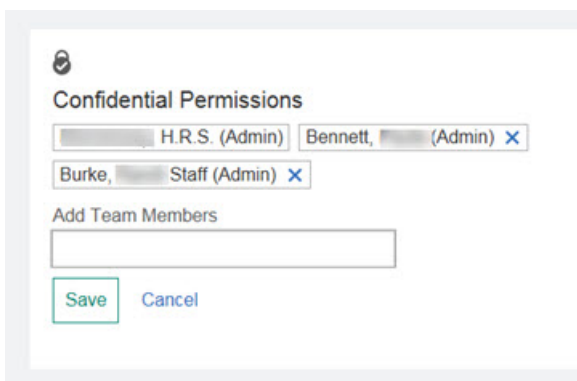
The **Confidential Permissions** section opens in edit mode.

- Begins entering a team member name in the Add team Members text box. Entering text activates auto complete, and a list of potentially matching team members displays in the drop-down menu.

Note: Only Lead Manager users with **Confidential** privileges display in the auto complete drop-down menu.



- Selects one or more names from the auto complete list to add the leads to the **Confidential Team**.



- Selects **Save**.

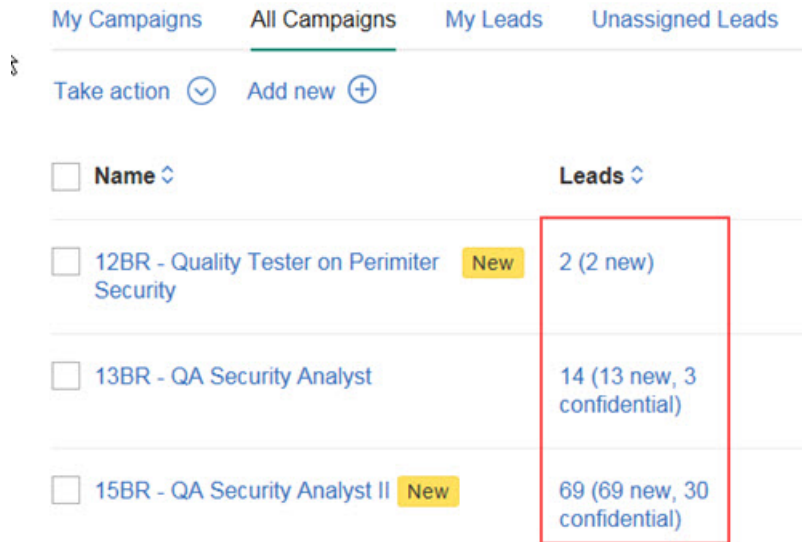
Lead Manager Users without Confidential Privileges

For Lead Manager users who do **Not** have confidential privileges, **Confidential Leads** are hidden from view in:

- **Campaigns**
- **Lead Grids**
- **Bulk Upload**

However, Lead Manager users who do **Not** have **Confidential** user privileges, they can see a count of **Confidential Leads** that display on the:

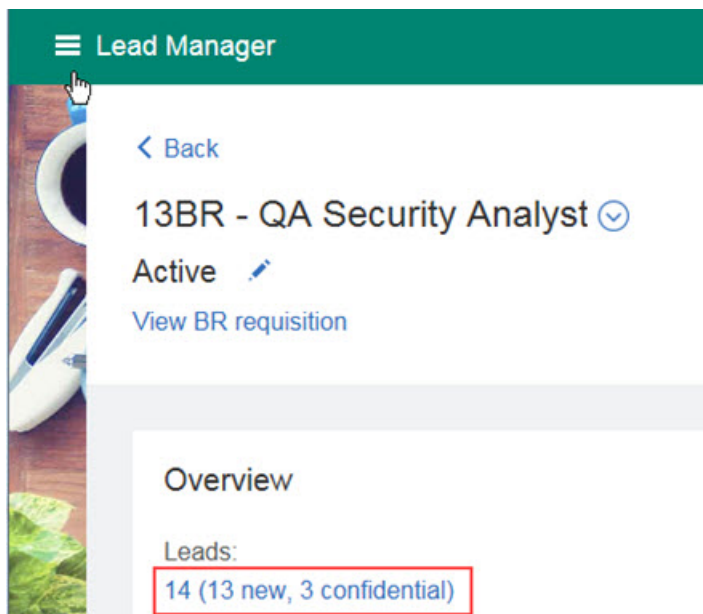
- All Campaigns page in the **Leads** column and in the grid view.



The screenshot shows a table with columns for 'Name' and 'Leads'. The 'Leads' column contains counts of new and confidential leads for three campaigns. A red box highlights the 'Leads' column data.

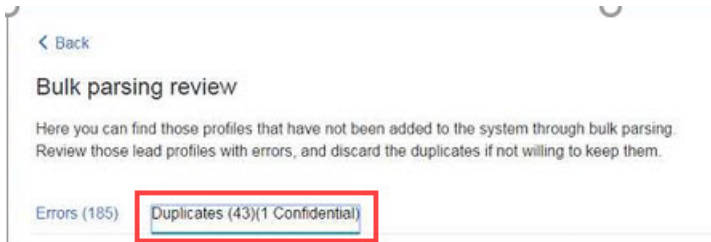
Name	Leads
<input type="checkbox"/> 12BR - Quality Tester on Perimeter Security New	2 (2 new)
<input type="checkbox"/> 13BR - QA Security Analyst	14 (13 new, 3 confidential)
<input type="checkbox"/> 15BR - QA Security Analyst II New	69 (69 new, 30 confidential)

- Total Leads section for each individual Campaign.

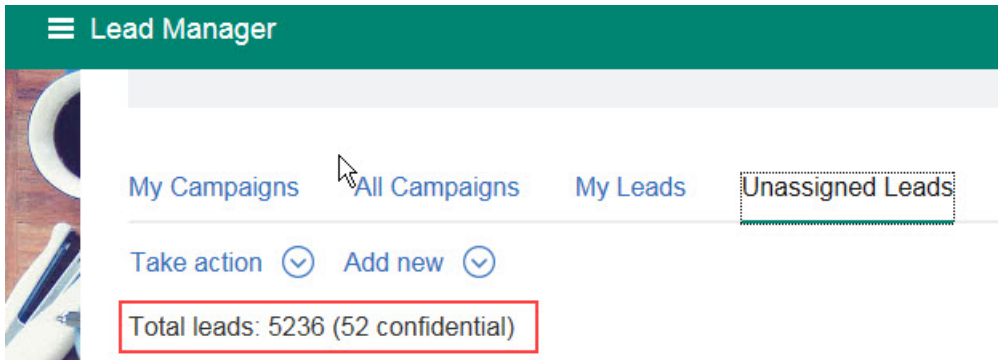


The screenshot shows the 'Lead Manager' interface. The top bar is green with a hamburger menu icon and the text 'Lead Manager'. Below it, there is a 'Back' button, the campaign name '13BR - QA Security Analyst' with a dropdown arrow, the status 'Active' with an edit icon, and a 'View BR requisition' link. The 'Overview' section shows 'Leads: 14 (13 new, 3 confidential)', with the count highlighted by a red box.

- Bulk Parsing Review page.



- Unassigned Lead grid page in the **Total Leads** section and in the grid view.



In other words, users without **Confidential** privileges can see this count of **Confidential Leads** but cannot access the record of the **Confidential Leads**.

RTC Internal Reference Epic RTC #70449; RTC #67552; RTC #70457; RTC #70459; RTC #70462; RTC #70464; RTC #70466; RTC# 70555; RTC #70557; RTC #70561, RTC #70563; RTC #70564; RTC #70565; RTC #73587; RTC #76371; RTC #78928; RTC #80995; Epic RTC#81896; RTC #85413.

Reassigning Leads and Bulk Upload in the Confidential Workflow:

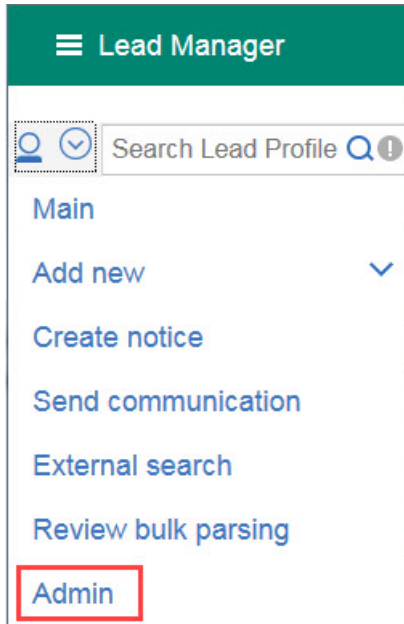
Reassigning Confidential Leads and Uploading using Bulk Upload in the Confidential Workflow are outlined here.

Reassigning Confidential Leads

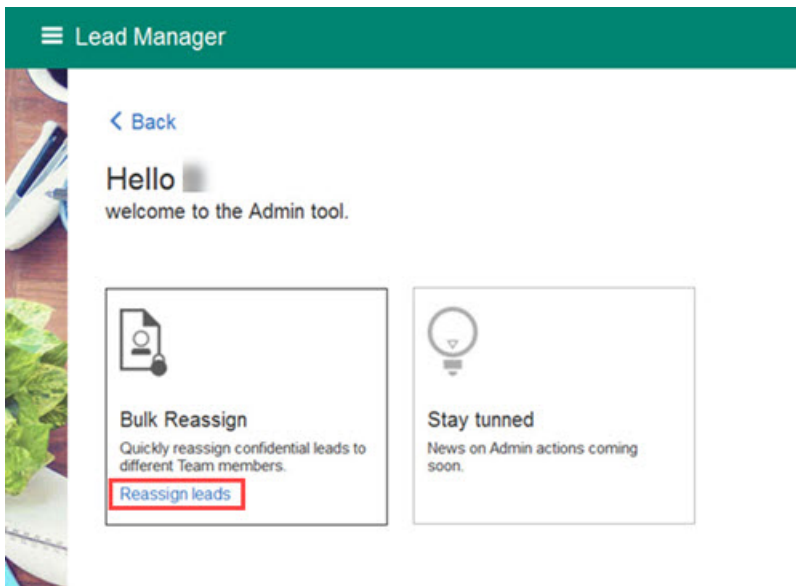
Lead Manager users with the **Leads - Confidential (Bulk Reassign)** can administer reassignment of **Confidential Leads** within **Lead Manager**. This provides a quick way to update multiple records when a user leaves the organization or simply has a role change and no longer should be assigned to Confidential Leads.

Note: When reassigning **Confidential Leads** leads, the user privilege for the **Confidential Team Members** in the **From** entry and the **To** entry must match. For example, only a Leads - Confidential (Bulk Reassign) user can reassign confidential leads to another Admin user. On the main Lead Manager page, the user:

- Selects **Admin**.



The Admin tool page opens.



- Selects **Reassign Leads**. The Bulk Reassign page opens.

Bulk Reassign
 All confidential leads from selected team member will be reassigned to a new team member. Previous team member will no longer have access to his confidential leads.

From:

To:

Reassign Cancel

- Enter the **Confidential Team Members** name in the **From** and **To** fields.
- Selects **Reassign**. The **Confidential Leads** are reassigned to the new team member. The new user replaces the existing user on the team and all other team members remain unchanged.

Uploading Confidential Leads

When a Lead Manager user uploads leads and uses **Add Lead**, **Bulk Parsing**, or **Excel, Upload resume**, **External Search** import flows, the system recognizes if the uploading lead is a duplicate of an existing confidential lead. If the user uploading the leads is not a member of the **Confidential team**, an error that alerts the user exists and is confidential. The alert also gives the user the option to return to the dashboard or remain on the current page.

When **Bulk Parsing** is used to upload leads, the user receives an alert in the email sent when the parsing completes. The alert notifies the user that one of the uploaded leads existed and is confidential and that the duplicate lead was not created.

Linking in the Confidential Workflow:

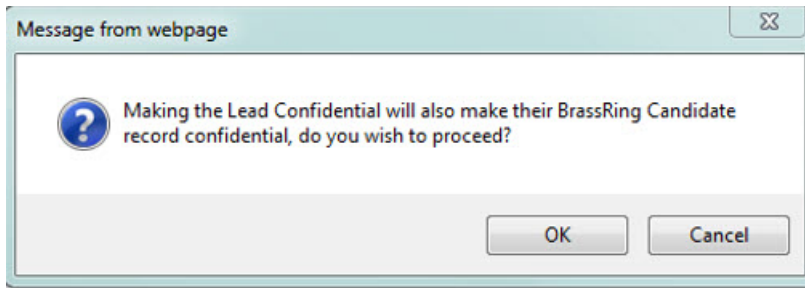
Linking BrassRing candidates and Lead Manager Confidential leads in the **Confidential workflow** can produce multiple outcomes.

Linking BrassRing Candidates and Lead Manager Leads

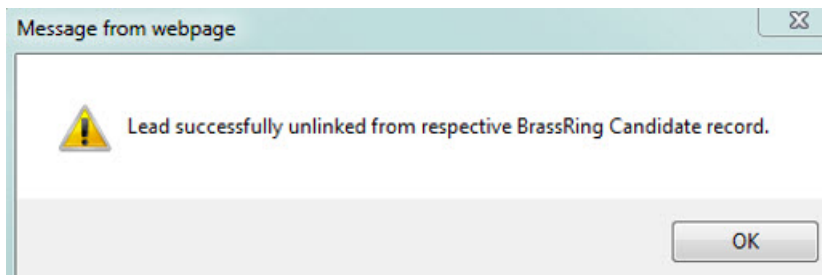
Linked BrassRing candidates and Lead Manager Leads must be either both public or both confidential. Clients must ensure that **Confidential Lead Administrators** have the appropriate privileges in **both** BrassRing and Lead Manager to make sure they aren't blocked when marking candidates or leads confidential.

In this scenario, **Confidential Lead Administrators** have both BrassRing and Lead Manager confidential privileges and the BrassRing and Lead Manager accounts are linked. To mark the lead confidential and unlink the account, a typical workflow might look like this:

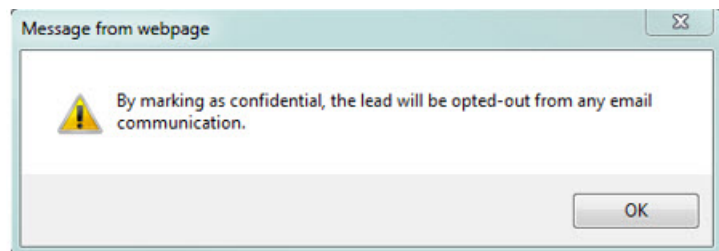
- Public BrassRing candidate is sent to Lead Manager.
- **Confidential Lead Administrators** marks this lead as **Confidential** and selects **Save**.
- System responds and requests the Administrator to confirm that they want to make both the Lead Confidential and the BrassRing Candidate confidential (secure).



- Administrator selects **Cancel** and system prompt opens.



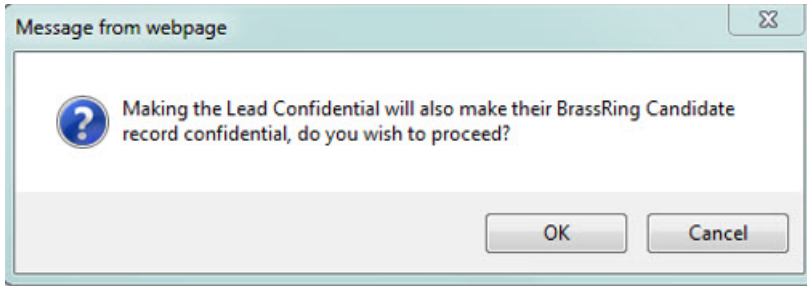
- Administrator selects **OK**.
- System prompts:



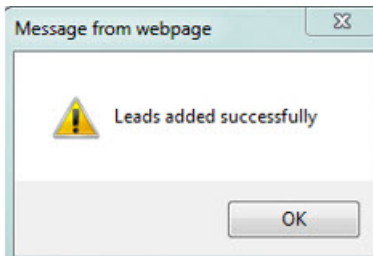
- Administrators selects **OK**
- **Result:** Lead is marked as confidential, Candidate is Public, and the records are no longer linked.

In this scenario, **Confidential Lead Administrators** have both BrassRing and Lead Manager confidential privileges and the BrassRing and Lead Manager accounts are linked. To mark the lead confidential and mark the BrassRing account confidential (secure), a typical workflow might look like this:

- Public BrassRing candidate is sent to Lead Manager.
- **Confidential Lead Administrators** marks this lead as **Confidential** and selects **Save**.
- System responds and requests Administrator to confirm that they want to make both the Lead Confidential and the BrassRing Candidate confidential.



- Administrator selects **OK**.
- System responds with confirmation.



- Administrator selects **OK**.
- **Result:** Lead is marked as confidential, Candidate is marked secure, the accounts are linked, and lead is removed from Watson Campaign Automation.

Note: If a Lead Manager Administrator has Lead Manager **Confidential** privileges but **NOT** BrassRing confidential privileges, and the accounts are linked, when the lead is made **Confidential**, the accounts are no longer linked.

At present there are some known issues and limitations regarding linking, see Known Issues.

Lead Manager Considerations:

Clients who incorporate the **Confidential Leads Workflow** must keep in mind the following potential impacts on their existing workflows.

Confidential Leads Rules

When the **Confidential Leads Workflow** is enabled, clients must be aware that there are some rules and limitations that might impact their existing workflows.

- When BrassRing Talent Records are made confidential, the Talent Records cannot be made public again.
- When a saved lead is made confidential, it cannot be made public again.
- Linked BrassRing candidates and Lead Manager Leads must be either both public or both confidential. Confidential lead records cannot be linked to BrassRing public records. Administrators must ensure that they have the appropriate privileges in **both** BrassRing and Lead Manager when marking candidates and leads as confidential. If the Administrator does not have the appropriate privileges in both BrassRing and Lead Manager, the records cannot be linked.
- The BrassRing RAM trigger for **Add Lead to Lead Manager** is always blocked if the candidate is confidential.
- Confidential Leads are automatically opted out from email and the contact information is deleted from **Watson Campaign Automation**. In other words, email communication cannot be

sent to Confidential Leads. Email communication includes mass mailings, individual emails sent from the lead profile, or from the lead profile page **Take Action > Send Communication** action.

- A confidential lead must always have at least one Administrator on the team.
- The functionality of **HR Status** and **auto-deletion of lead** applies to Confidential Leads. For example, if a candidate's **HR Status** triggers a notification to Lead Manager and that **HR Status** is configured in Lead Manager to **auto-delete the lead**, the lead is deleted.
- Counts of confidential records on grids are visible to **all** users, regardless of whether the user has privileges to open or edit the lead profile. The only exception is in Search Results, where only the total count of leads are listed, not a breakout of with the confidential count.
- Confidential Leads are not available in **Data Insight Tool** regardless of a user's privileges.
- When **Confidential Administrators** make an existing public lead confidential, the user sees this prompt:
 - There is no version control setting; Lead Manager Confidential Privileges are not available to clients in **Production**. Epic functionality will be made available by deploying privileges to **Staging or Production** so clients can configure it.
 - The privileges of **Leads - Confidential (Administrator)** and **Leads - Confidential (View)** apply only to the viewing of the Confidential section of the lead profile. A Lead Manager user with the **Leads - Confidential (Administrator)** is the only user who can edit the Confidential Lead in the **Confidential Permissions** section. Lead Manager users with the **Leads - Confidential (View)** retains rights to edit all **other** sections of the lead profile.

How do clients get this feature?:

Confidential Lead configuration is controlled by IBM Kenexa BrassRing Workbench user type privilege settings.

Configuring Confidential Leads

There are three user privileges for Confidential Leads:

Note: A temporary version control setting determines whether all project features are available. Only clients who have this version control setting turned on are able to see the new user type settings and any other related features.

- **Leads - Confidential (Administrator)**
 - The **Leads - Confidential (Administrator)** user privilege allows:
 - **Administrators** to make Lead Manager leads confidential. **Administrators** marking leads as confidential are automatically included in the list of users with access to the **Confidential Leads**. At least one **Administrator** must be associated with the **Confidential Lead** record.
 - **Administrators** to add or remove which Lead Manager Team Members can view **Confidential Leads**.

Note: When the **Leads - Confidential (Administrator)** privilege is enabled, the **Leads - Confidential (View)** is simultaneously enabled.

- **Leads - Confidential (Bulk Reassign)**
 - The **Leads - Confidential (Bulk Reassign)** privilege allows:
 - **Confidential Lead Manager users** to reassign **Confidential Leads** to different team members within the Lead Manager application.
- **Leads - Confidential (View)**
 - The **Leads - Confidential (View)** privilege allows:
 - **Administrators** to determine who can view and have access to **Confidential Leads** only in the Confidential section of the lead profile.

Note: Lead Manager users with **Edit** view privileges retain their rights to edit all other sections of the lead profile.

Assigning Confidential Lead User Privileges

By default, all three of the **Confidential Lead Privileges** are disabled (unchecked). Administrators can select one or all three of the **Confidential Lead** privileges. Lead Manager Administrator:

- Browses to **Tools > Users > > User Types > Lead Manager**.
- Selects the **Edit type permissions** pencil icon for the user type name you want to edit. The Set Name and Function modal opens.
- Selects the pencil icon for **Lead Manager**. The Set Privileges modal opens.
- Selects a check box to enable one or more of the **Lead Manager privileges**.

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

Known Issues - Confidential Leads:

The following known issues and limitations in the **Confidential Lead** workflow between Lead Manager and BrassRing currently occur.

When a Lead Manager public lead is sent to BrassRing (req folder, working folder, or contact) and is not currently linked as a BrassRing candidate, the BrassRing system searches for a match in order to link the lead and the candidate. These scenarios outline potential outcomes of system searches for a match:

- If the search locates a matching record that is already marked as Secure/Confidential and the Lead Manager user has **Leads - Confidential (Administrator)** and **BrassRing Secure Candidate** privileges, and the Lead Manager user selects **Yes**, the system links the records, makes the lead **Confidential** and opt outs the lead from receiving communication in **Watson Campaign Automation**.
- If the search locates a matching record that is already marked as Secure/Confidential and the Lead Manager user has **Leads - Confidential (Administrator)** privilege but does not have **BrassRing Secure Candidate** privileges, the system informs the Lead Manager user that they do not have the privileges to link the accounts and recommends the user contact the Lead Manager administrator.
- If the search locates a matching record that is already marked as Secure/Confidential and the Lead Manager user has **Leads - Confidential (View)** privileges but does not have **BrassRing Secure Candidate** privileges, the system informs the Lead Manager user that they do not have the privileges to link the accounts and recommends the user contact the Lead Manager administrator.
- If the search locates a matching record that is already marked as Secure/Confidential and the Lead Manager user has **Leads - Confidential (View)** privileges and has **BrassRing Secure Candidate** privileges, the system informs the Lead Manager user that they do not possess the privileges to link the accounts and recommends the user contact the Lead Manager administrator.
- If the search locates a matching record that is already marked as Secure/Confidential and the Lead Manager user has **NO Leads - Confidential (View)** privileges but has **BrassRing Secure Candidate** privileges, the system informs the Lead Manager user that they do not possess the privileges to link the accounts and recommends the user contact the Lead Manager administrator.
- If multiple public leads are sent to BrassRing and there is at least one matching **BrassRing Secure Candidate**, the system blocks the entire transaction.
- Current functionality remains the same. In other words, when Lead Manager users link Lead Manager public leads and BrassRing public candidates, both records remain public and retain opt-in status for email communication in **Watson Campaign Automation**.

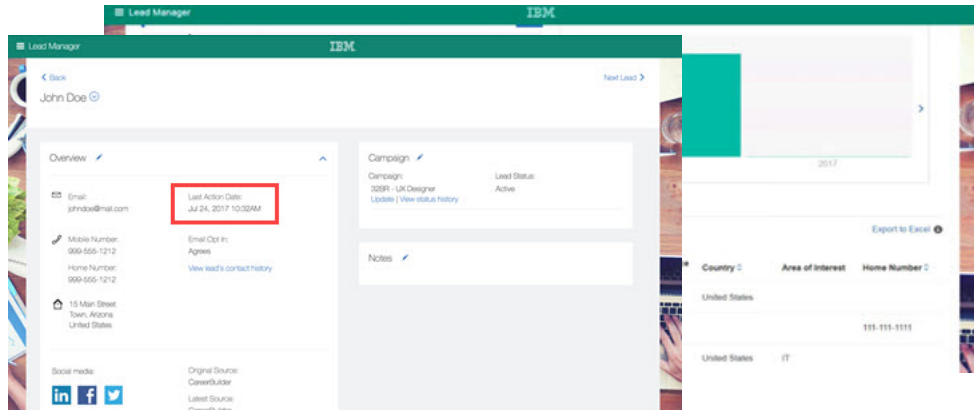
Lead Profile - Last Action Date

As a sourcer, Lead Manager users need to know when an action was last taken on a lead. To ensure leads are not forgotten about or contacted too frequently, a new standard field **Last Action Date** field

now displays on the **Lead Profile** page. The **Last Action Date** field shows Lead Manager users when an action was last taken on a lead. By default, this field does not synchronize with Watson Campaign Automation (WCA) but can be configured to synchronize with WCA. By default, the **Last Action Date** field is searchable and outputable and will be available for reporting in the Data Insight Tool (DIT) in a future release.

Lead Profile - Last Action Date

A new standard field **Last Action Date** is now available that displays in the **Overview** section on the **Lead Profile** page. The field can also be configured to be a column on the **Lead Grid** and **Search Results** pages. For existing leads, this field is pre-populated with the **Last Modified Date** on initial configuration and updates as actions occur. Administrators may also update the User Type privileges for this field, like other standard fields.



The **Last Action Date** is updated to the current date when any of the following actions are taken on the Lead's profile record:

- Lead profile is added, edited, or saved.
- Lead is added to a campaign.
- Lead status is updated.
- Notes are added to the Lead profile.
- Lead is sent a communication.
- Lead is added to BrassRing.
- Lead is updated via stacking, Excel upload, Bulk Parsing or there is an External Search import.
- Lead status is updated via a RAM trigger.

The Last Action Date standard field has been added into the Lead Fields: **Workbench >> Tools > Lead Manager > Administer Lead Fields > .**

Administrators may also update User Type privileges for this field, like other standard fields.

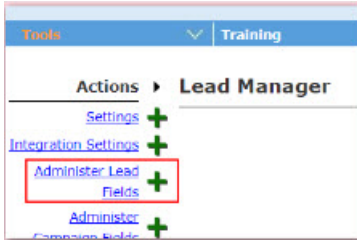
How do clients get this feature?:

The **Last Action Date** field is a standard Lead Manager field and is configure in BrassRing Workbench

Configuring the Last Action Date Standard Field

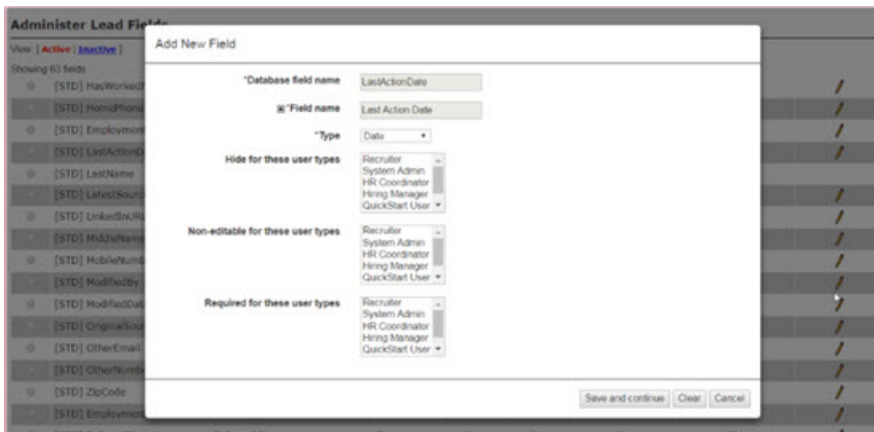
Lead Manager Administrator:

- Browses to **Tools > Lead Manager > Administer Lead Fields.**

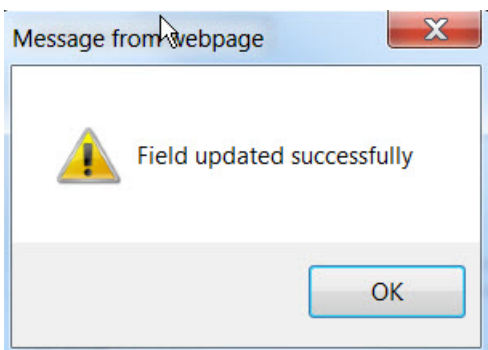


- Selects **Add New Field**. The Add New Field modal opens. Completes all fields in the modal.
-

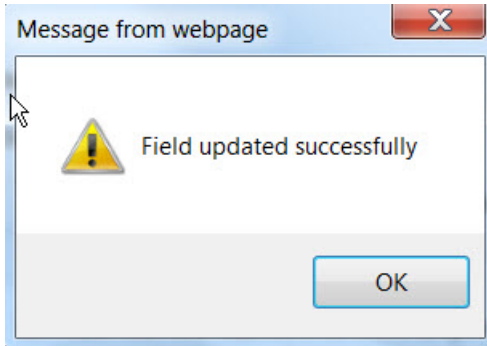
Note: Database Field names in Lead Manager and Watson Campaign Automation must match exactly.



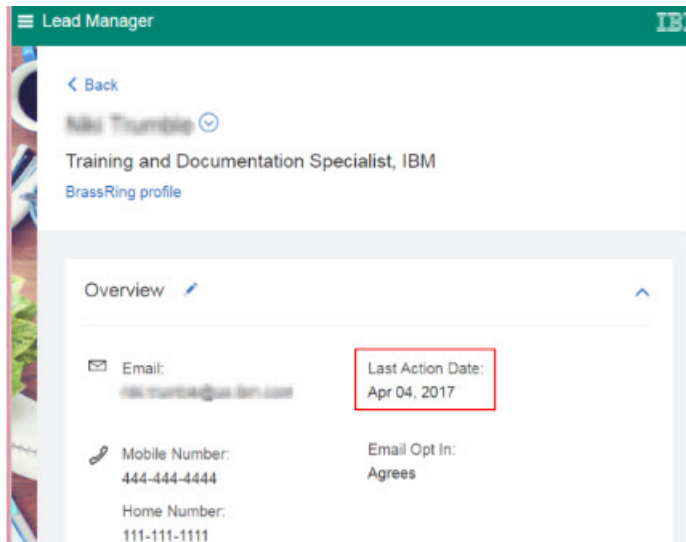
- Selects **Save and Continue**. A message confirming a successful update opens.



- Selects **Save**. A message confirming a successful update opens.



- Selects **OK**. The **Last Action Date** now displays on the **Lead Profile**.



Adding Last Action Date Field to Lead Grids

Lead Manager Administrator:

- Browses to **Tools > Lead Manager > Configure Listing Grids**.



- Selects the **Last Action Date** field for the Listing Grid.

Grid Configuration

View: [Active | Inactive] Configure Lead Listing Grid

Listing grid name: Lead Grid Name:

#	Selected field	Custom column label
1	Lead Name	
2	Down [STD] EmailAddress	Column Label: <input type="text"/> English
3	Up Down [STD] EducationSchoolName	Column Label: <input type="text"/> English
4	Up Down [STD] LastActionDate	Column Label: <input type="text"/> English
5	Up Down [STD] EducationAreaOfStudy	Column Label: <input type="text"/> English
6	Up Down [STD] EducationLevel	Column Label: <input type="text"/> English
7	Up Down [STD] EmploymentCompany	Column Label: <input type="text"/> English
8	Up Down [STD] EmploymentJobTitle	Column Label: <input type="text"/> English

- Selects **Save**.
- The **Last Action Date** displays on the Lead Grid.

My Campaigns All Campaigns My Leads **Unassigned Leads**

Take action Add new

Total leads: 2

<input type="checkbox"/>	Name	Email	School Name	Last Action Date	Education Level	Company
<input type="checkbox"/>	Dean, Jirany	jrdean@univ.wisc.edu		Oct 03, 2017		
<input type="checkbox"/>	Trumble, Aki	aki.trumble@univ.wisc.edu	University of Wisconsin Show More	Apr 04, 2017	Bachelors	IBM

BrassRing Workbench

The current release of IBM Kenexa BrassRing on Cloud includes the following configurable features for IBM Kenexa BrassRing Workbench. Configurable features must be configured or turned on to be visible and available to users.

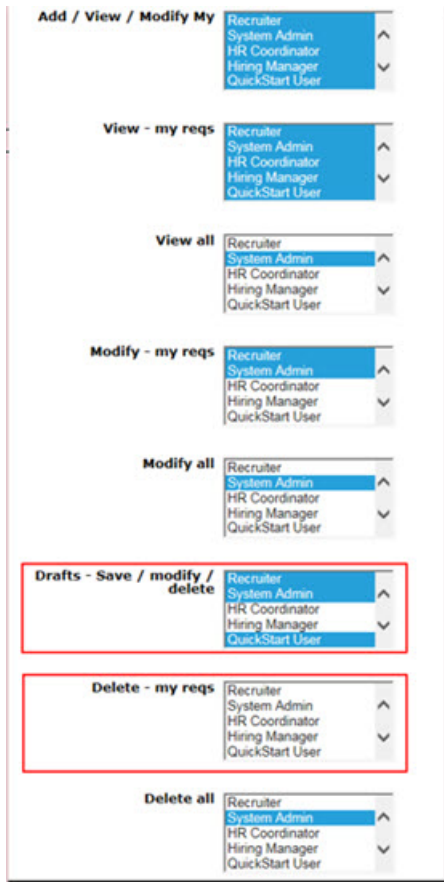
BrassRing Workbench Changes

This release introduces the following BrassRing Workbench configurable changes.

Candidate Form Attributes - Delete My Forms

Starting this release, clients can configure a form attribute to allow user types to delete candidate forms that are associated to reqs that they have a my req relationship with. In order to provide this permission, the Edit Form attribute page has new configuration options. Following are the changes that are made in the Edit form attributes screen:

- Save as draft Save / modify / delete is changed to **Drafts - Save / modify / delete**. This privilege is applicable only to DRAFT forms. Forms in draft automatically have the 'my' context tied to it.
- A new **Delete - my reqs** is added. This shows the **Delete Form** action for the candidate forms associated to the reqs that the user is associated to **my reqs**.

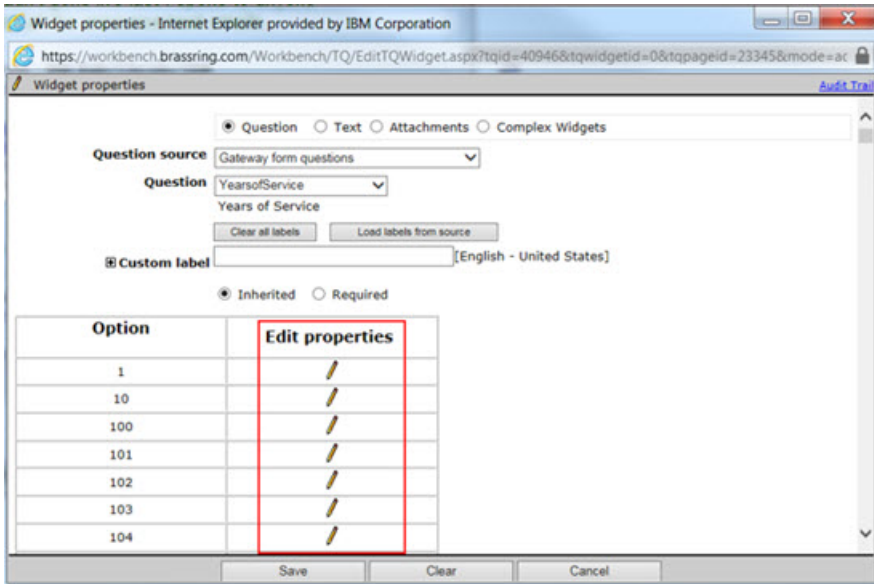


RTC Internal Reference # 90349.

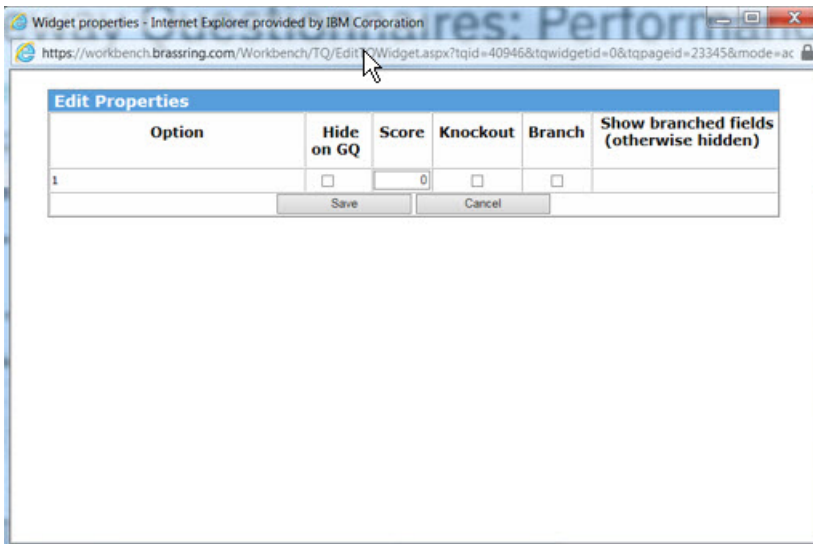
Gateway Questionnaires - Performance Issues

When the number of options in a Gateway Questionnaire field exceeded 400, performance issues were reported by clients. This was specifically around Editing the GQ page where the field was located. In order to improve the performance, starting this release, if there are more than 400 options in a field on the GQ, instead of displaying all options, an **Edit** action displays. When the user selects Edit, they can configure each option. If the number of the options is less than 400, then this change is not applicable.

Administrator browses to **Tools > Gateway Questionnaires > Edit > Pages > Edit Widget** to edit or add a question widget by picking a question that has over 400 options.



Selects **Edit Property**.



RTC Internal Reference # 90469

Client Settings - Hide Client Setting

A client settings **ReportsStandardURL** is moved to hidden status. This client setting is no longer available for IBM Workbench users to edit or update.



RTC Internal Reference # 93143.

Data Insight Tool - SFTP Configuration

Based on client request, starting this release, IBM Workbench users can configure up to 5 SFTP sites to which the clients' respective Data Insight Reports are posted. Before this release, clients were only allowed to configure one SFTP site.

Global and franchise clients often need to keep data separate and rely on multiple SFTP sites to do so. This feature allows those clients to keep the data separate by dictating which SFTP site the DIT data is sent.

Multiple SFTP sites helps clients that do not have the technical resources or financial means to create XML integrations. Those clients can “integrate” with multiple vendor SFTP sites or send DIT data to multiple folders for storage.

Browse to **Client Settings** > [select the configure button for the **Data Insight Tool - Enable FTP setting**]

The screenshot shows the 'Edit client settings' window with the following configuration options:

- Custom Reports Have Been Localized**: No Yes
- Data Insight Tool**: No Yes
- Data Insight Tool - Display form field name**: Display name and database name
- Data Insight Tool - Enable FTP Download**: **Configure** (highlighted with a red box)
- Data Insight Tool URL**: https://qa4dit.BR.swglab.ibm.com/PhxWebHost/
- DaysAck**: 30
- Default action for Move/Copy Candidates to Req**: Copy Move
- Default action for Move/Copy to Req - HR status retention**: Do not retain any HR status data
- Display inactive options in edit mode for Reqs and Candidate forms**: No Yes
- Display Responsive UI for eLinks**: No Yes
- Display Skills and Resp. fields for apply using**: Profile builder resume Any resume/CV type
- DisplayElinkLogo**: None
- Document templates (.doc/docx) - remove extra line break(s) caused by non-satisfying**: No Yes

Buttons at the bottom: Save, Revert to saved, Cancel

To add a new or additional SFTP site,

1. select **Add New FTP** from the **Configured FTPs** field and proceed to fill in the required fields. The value entered into the Configuration Name field is what BrassRing users see in the Data Insight Tool when picking a Delivery Type.
2. Select **Test & Save**

Configure DIT FTP Settings [Audit Trail](#)

Enable FTP Download No Yes [Help](#)

Configured FTPs

Hosted By Client Kenexa

Configuration Name

Server Name

Protocol

User Name

Password

Port

Folder

Encryption Type No Encryption PGP

IBM strongly recommends enabling Encryption for the security of your data.

Encryption Key User ID

Encryption Public Key

Encryption File Extension

Encryption Sign Encrypt No Yes

Compression No Yes

Maximum Retry Attempts

To view the settings for an existing SFTP site, select the **Configured FTP** option to refresh the page to view the settings.

Configure DIT FTP Settings [Audit Trail](#)

Enable FTP Download No Yes [Help](#)

Configured FTPs

Hosted By Client Kenexa

Configuration Name

Server Name

Protocol

User Name

Password

Port

Folder

Encryption Type No Encryption PGP

IBM strongly recommends enabling Encryption for the security of your data.

Encryption Key User ID

Encryption Public Key

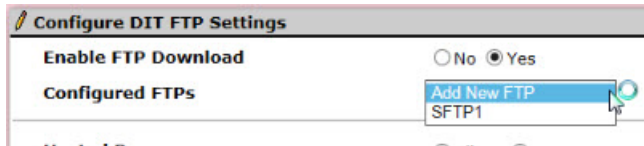
Encryption File Extension

Encryption Sign Encrypt No Yes

Compression No Yes

Maximum Retry Attempts

While users generate or schedule a DIT report (either an ad hoc report or a scheduled report) Data Insight Tool users can select one of the configured SFTP sites to post the generated reports. As you add SFTP sites, the sites are visible in the drop-down menu.



RTC Internal Reference # 77959

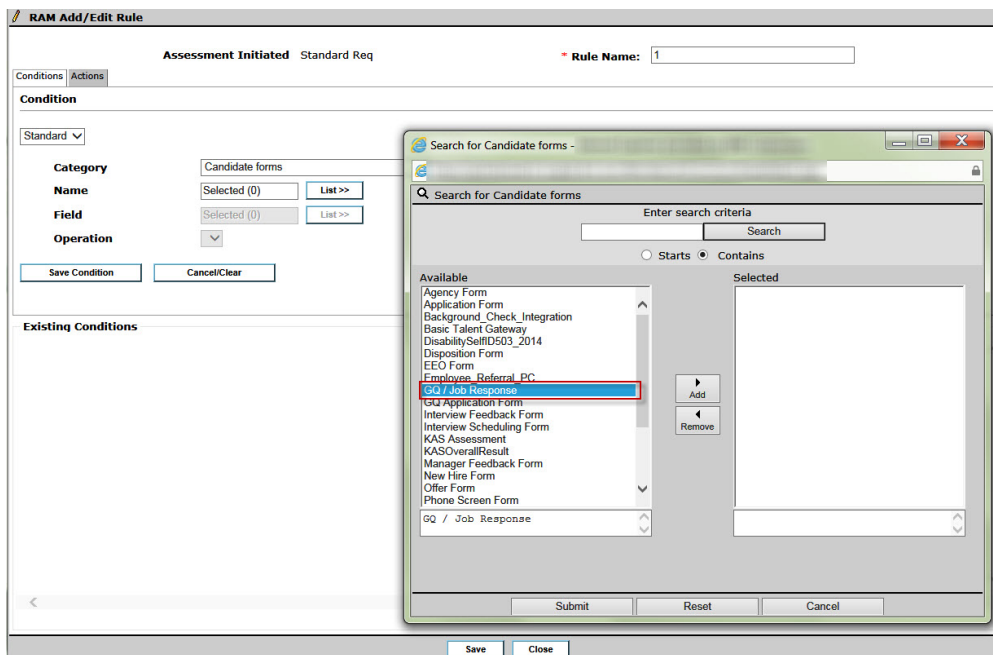
Rules Automation Manager - New Candidate Form Option

Starting this release, Workbench users creating and editing RAM triggers will be able to select a new candidate form option for RAM trigger conditions called **GQ / Job Response** (Checks the TG job response form or GQ job response form on the candidate's Talent Record). The new option is available for selection only for the following triggering mechanisms with a candidate and req context.

- Assessment Initiated
- Candidate Form (per cand/req form)
- Document Subsidiary Form
- HR Status
- HR Status Req Options

The triggering mechanism of **Talent Recrod Viewed** is not supported as it might not always have a req context. In the case where a candidate applies more than once to the same requisition, and there are multiple job response forms, the field value from the most recent form is used when configured for that condition.

Note: A RAM trigger rule does not allow conditions on the **Talent Gateway** form and **GQ / Job Response** form in the same rule.



RTC Internal Reference #91760.

Short Messaging Service (SMS)

The **SMS** feature within Brassring allows users to send **SMS** text messages to one or multiple candidates simultaneously.

Learn More about SMS Configuration

When SMS messages are sent to candidates, a record of the SMS text message and the message content is stored in the candidate's Talent Record Action Log and within their communications.

Select this link to access the **SMS Text Messaging** document that contains the following topics:

- An Overview of SMS in BrassRing
- SMS Work-flows
- Configuration Steps
- Candidate Experience
- BrassRing User Experience
- Things to Know

BrassRing offers integrations with three SMS aggregation vendors:

- Clickatell
- mGage
- Whispir

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